User Guide

Microsoft 365:

Exchange, OneDrive, Sharepoint, Teams & Groups

Activating Backups

Microsoft 365

Table of Contents

1   Preface

1.1   About this Guide

Thank you for selecting CloudAlly Backup for Microsoft 365. Relax! All your Microsoft 365 data is now securely protected with easy recovery from data loss. CloudAlly comprehensively backs up your Microsoft 365 Exchange, OneDrive, Sharepoint, and Teams & Groups data on industry-leading AWS S3 storage. Our product's ethos is to provide feature-rich backup and recovery with security, ease of use, and flexibility woven in.

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

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

1.2   Audience

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

1.3   What's in this Guide

This guide is organized to help you find the information you need to manage CloudAlly Backup for Microsoft 365. It is divided into functional parts intended to support you as you manage your environment:
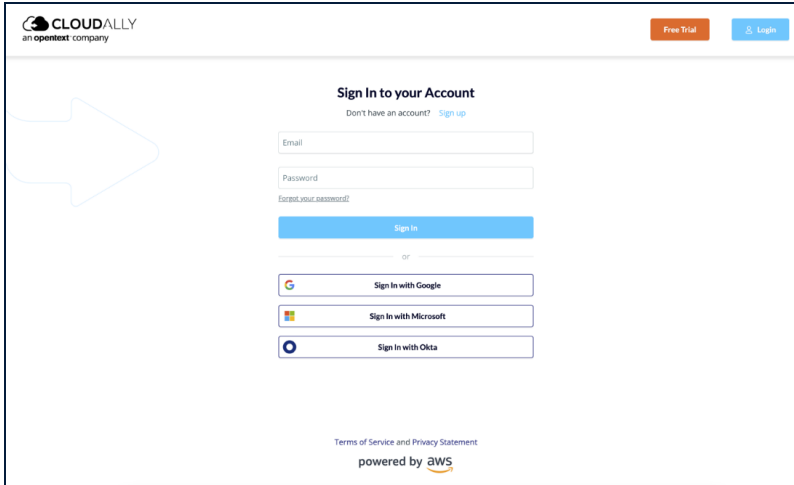
- Creating and Accessing Your CloudAlly Account
- Backing Up Your Data
- Recovering Your Backed Up Data
- Filtering and Viewing Drilldown Details
- Managing Your Account
- Managing Subscriptions and Payments

2 Creating and Accessing Your CloudAlly Account

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

2.1 Sign Up/Sign In from the CloudAlly Home Page

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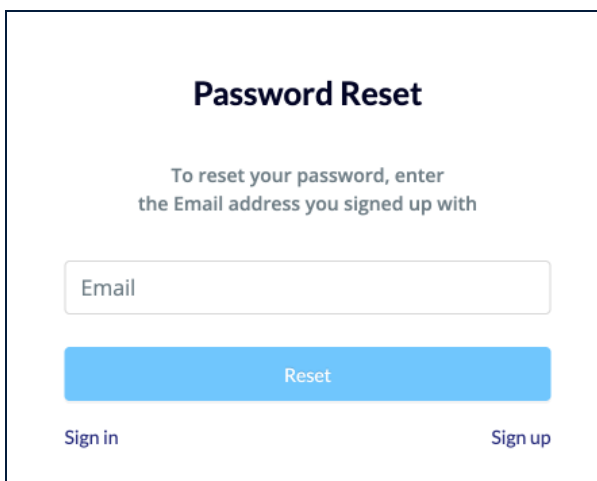
5. Your trial account is created, and an email containing your activation link is sent to your email address. Click on the activation link contained in the email you received to activate your account. If you sign up with Google, Azure, or Okta, the activation link will not be sent to you.

6. Once your account is activated, you are redirected to the CloudAlly *login* page. Enter your email address/password and click **Sign In** to login and access your CloudAlly Account.

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

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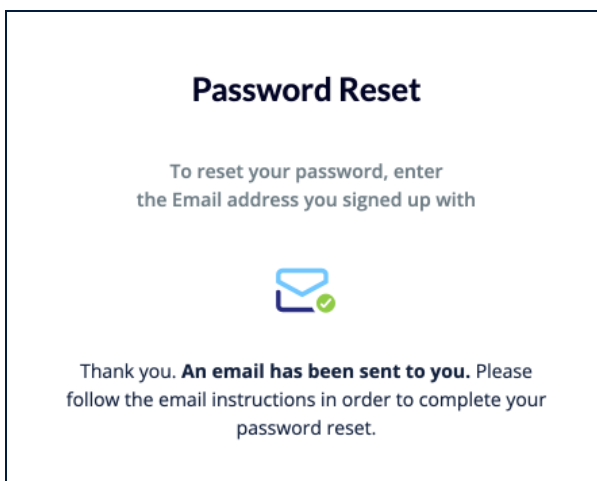
If you do not remember your password, you can easily reset it using the **Password Reset** function.

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

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:
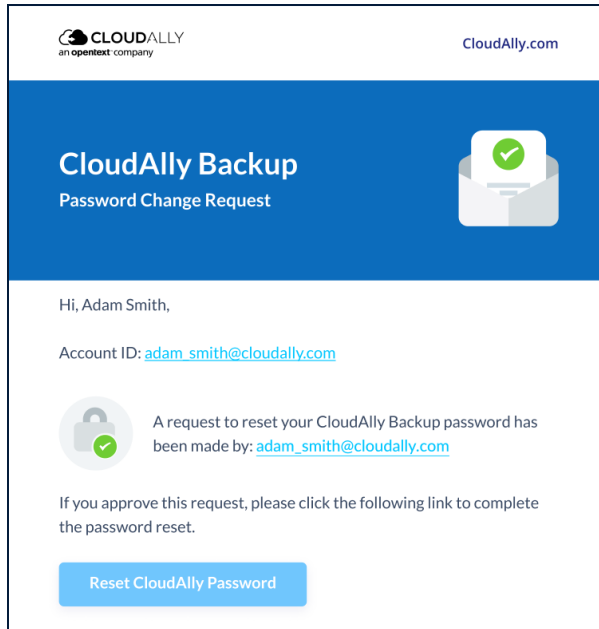
4. Click **Reset CloudAlly Password** to confirm the password reset, and the *Change Your Password* window will appear.
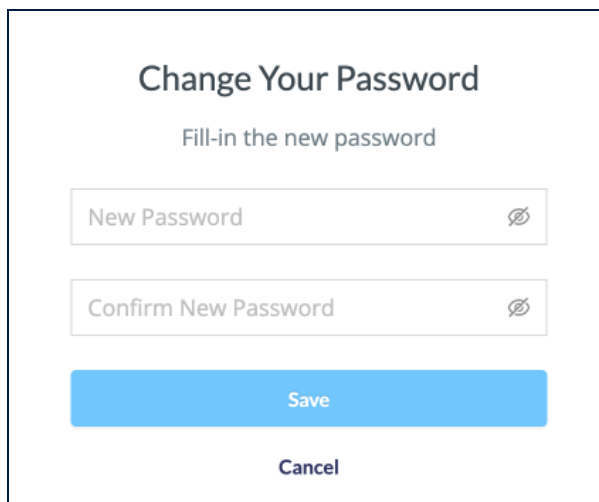
5. Enter your new password in the **New Password** field and again in the **Confirm New Password** field, and click **Save**.

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

3   Backing Up Your Microsoft 365 Data

Microsoft 365 lacks the daily backup and archiving process necessary for you to restore data after it has been manually or automatically removed from the recycle bin. CloudAlly automated daily Microsoft 365 backup service ensures that you can both quickly recover data from any point in time as well as export your archives for local storage.

CloudAlly's Microsoft 365 service backs up data from:

- Mail, Calendar, Contacts, Tasks and Notes (Microsoft Exchange)

- Conversations, Sites, Calendars and Channels (Microsoft Teams and Groups)

- All of your sites, files, and libraries (Microsoft OneDrive and Microsoft SharePoint)

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

3.1   Microsoft 365 Exchange

3.1.1   Creating a New Backup Task

To create a new CloudAlly backup task:

1. Sign in to your Account, or if you are already signed in, click the **Homepage** option in the Navigation Panel.

2. On the Homepage, click **+ Add Backup Task**.

The *Activate A New Backup* page is displayed:

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

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 CloudAlly support.

3.1.2   Configuring a Backup Task: Microsoft Exchange

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

1. You can change the name of the backup task by clicking ✎ .

2. The icon to the right of the Microsoft 365 logo displays whether the application was able to connect to the specified Microsoft 365 account. If the authentication token granted for the application becomes invalid (e.g., it expires due to inactivity because you put the backup task on pause for a long time), the green Connected icon changes to the red Disconnected. To grant the application a new token, click on the icon to open the authentication dialog, and repeat the authentication process.

3. By default, the "Index all data for Search" option is selected, which enables CloudAlly to provide you with its granular search and restore functionality. In the process, your data is temporarily decrypted for a brief period of time, and then re-encrypted once the index is built. If this goes against your company policy and you would like to disable automatic indexing, please contact support@cloudally.com.

4. In the Microsoft Exchange system, accounts can have an "Unlicensed" status (not to be confused with "Unlicensed product"). These can be the external accounts invited by users with an active license, accounts automatically generated for shared file storage, etc. You can find the license status of an account using the Admin Center. Check **Backup Unlicensed accounts** if you want CloudAlly to back up such accounts.

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

5. Backups are automatically archived when an entire site is deleted. The **Retain auto-archived backups** option allows you to retain them for a specified number of days, after which they will be deleted. Otherwise, the backups will be retained indefinitely.

6. The Automatically activate new mailboxes option instructs the system to detect new mailboxes, and begin backing them up automatically.

7. Create a new activation rule - see explanation [below](#).

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

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

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

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

10. Backup Frequency and Backup Hour

   a. Click the drop-down list adjacent to the **Backup Frequency** field and select how often you would like the backups to occur. The available options include:

      i. 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.

3.1.3   Activating Your Backups

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

1. Scroll down to the bottom of the screen where all of your account, team or site are listed.

> **Note:**   The screens below are from Microsoft 365 Exchange, but the functionality is identical for all of the Microsoft 365 applications.
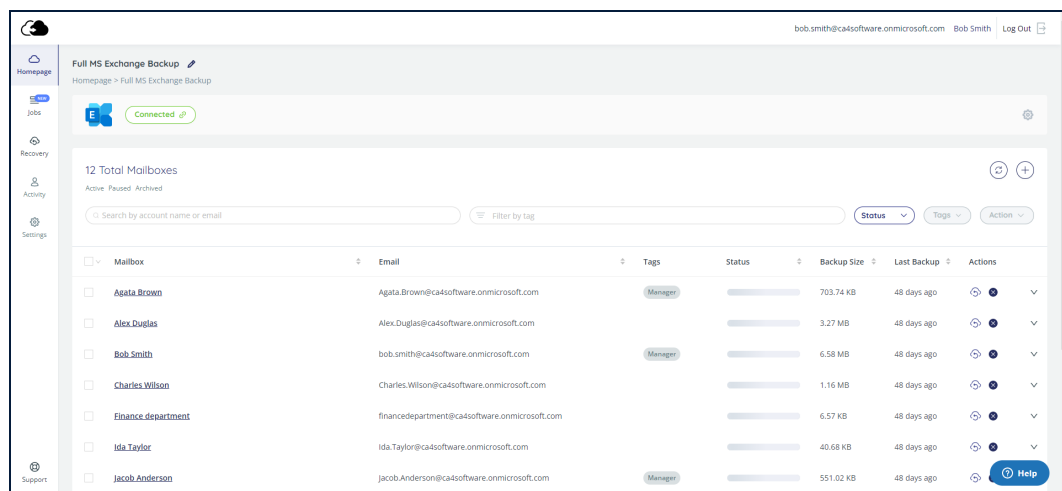
2. Select one or more account, team or site(s).

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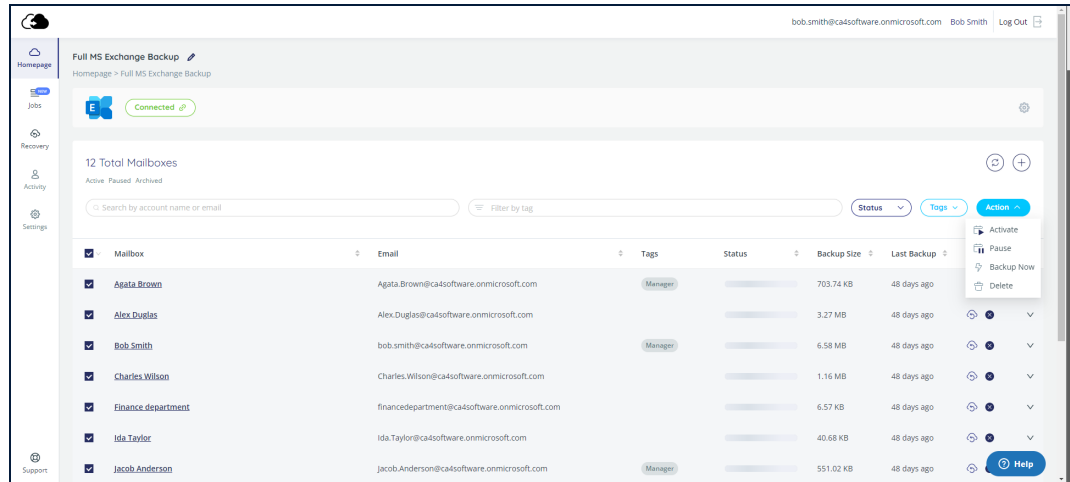
4. Alternatively, if you prefer to perform an immediate, on-demand backup, click **Action** > **Backup Now**.

3.1.4   Bulk Activation and Management

To create a new Activation Rule, click ⊕. The following *Bulk Activation and Management* screen appears:
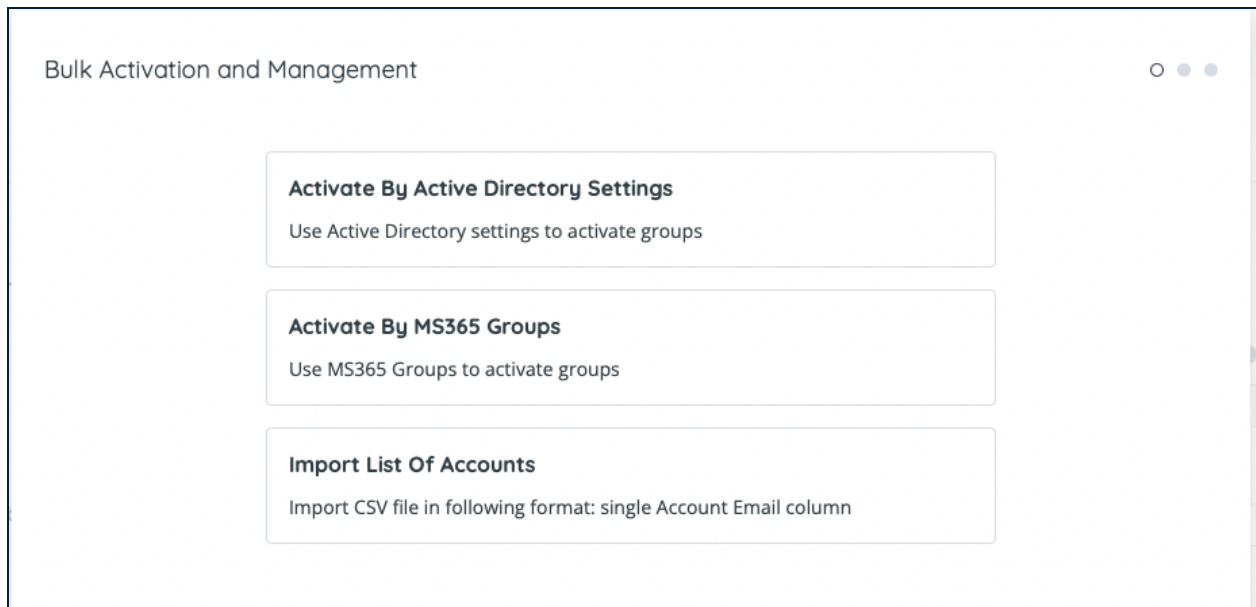
If you choose to activate by directory settings, the following screen appears next. Select the property that will be the basis for your new Activation Rule.
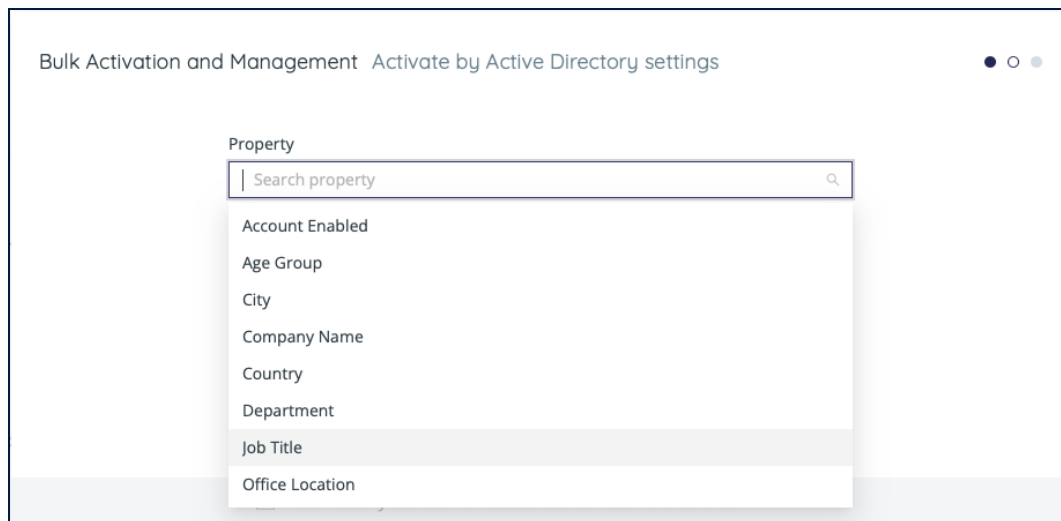
If you want to create a conditional activation rule, click **Automatically activate new accounts that match this condition,** and then click **Next**.
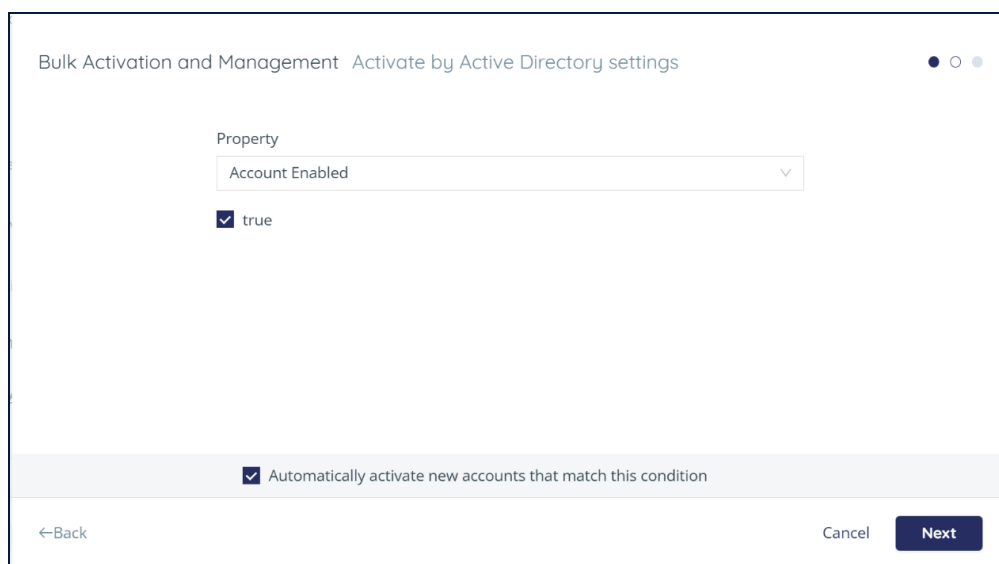
The following pop up will appear.

Please note, "Automatically activate ALL new accounts" is enabled in Settings. Do you want to disable it and keep only conditioned activation?

> **Continue To Automatically Activate ALL New Accounts**

> **Activate Only By Conditions Set Through Bulk Activation**

Cancel   **Confirm**
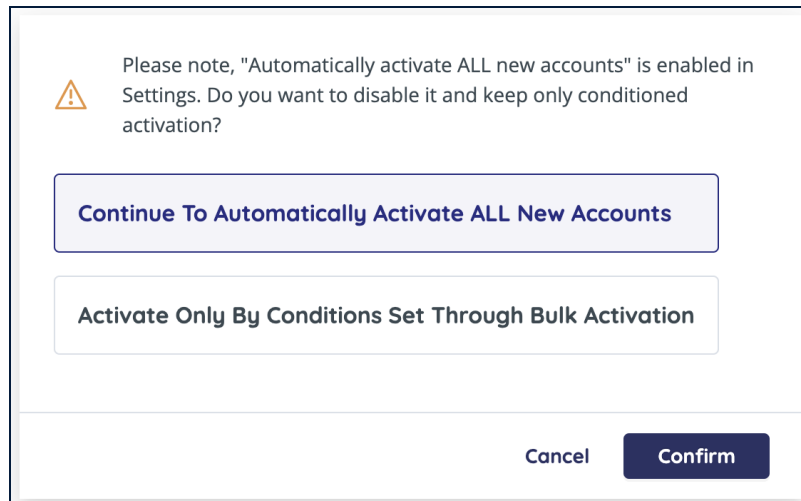
The pop up includes two available options for activation:

- Continue To Automatically Activate ALL New Accounts

- Activate Only By Conditions Set Through Bulk Activation

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

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

Bulk Activation and Management   Activate by Active Directory settings   ● ● ○

☑ Autotest   autotest@cloudally.com   Job Title   Autotest

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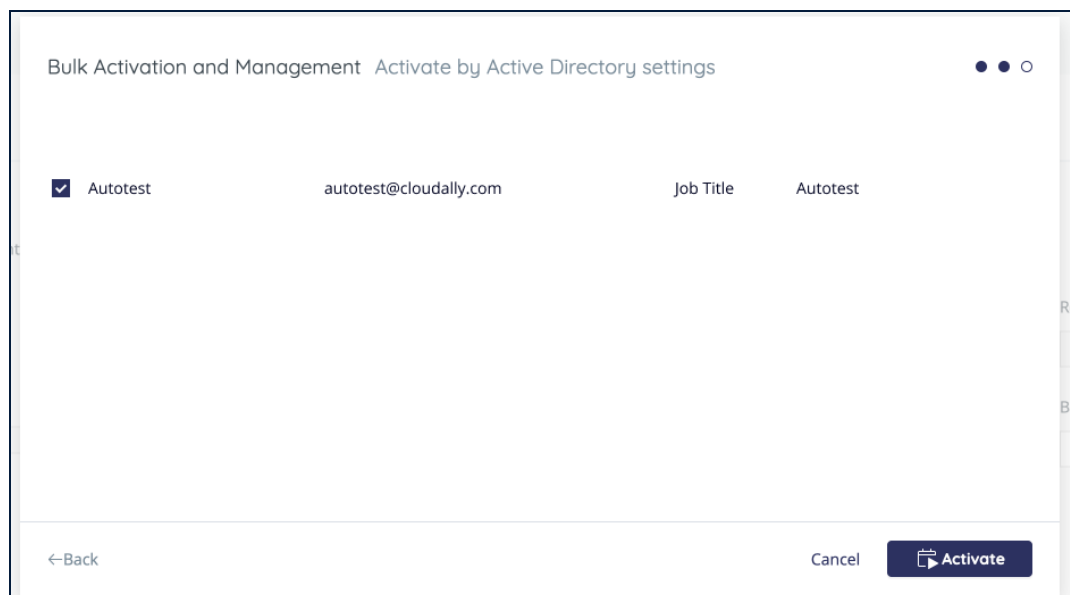
- ■ Click **Activate**. The selected accounts are activated, and if you have selected the Automatically activate new accounts that match this condition check box, the conditional activation rule is created.

- ■ If you choose to activate by Microsoft 365 Groups, the following screen appears next. Select the group(s) you would like to back up:

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

5. 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."

Bulk Activation and Management   Upload File With List Of Accounts   ● ○ ●

Drag & drop file or click in this area
CSV file with one column - email address, see **Sample**
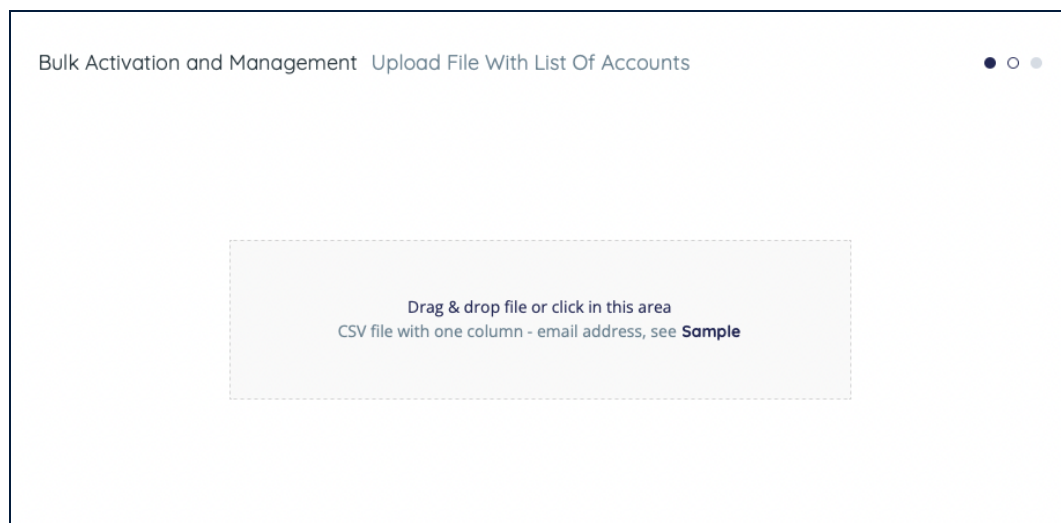
3.1.5   Backing Up a Public Folder

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

To back up a Public Folder:

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

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

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

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

3.1.6   Modifying the Settings of an Existing Backup

To modify an existing backup task:

1. Click the *Homepage* option from the Navigation Panel. The *Homepage* screen appears.
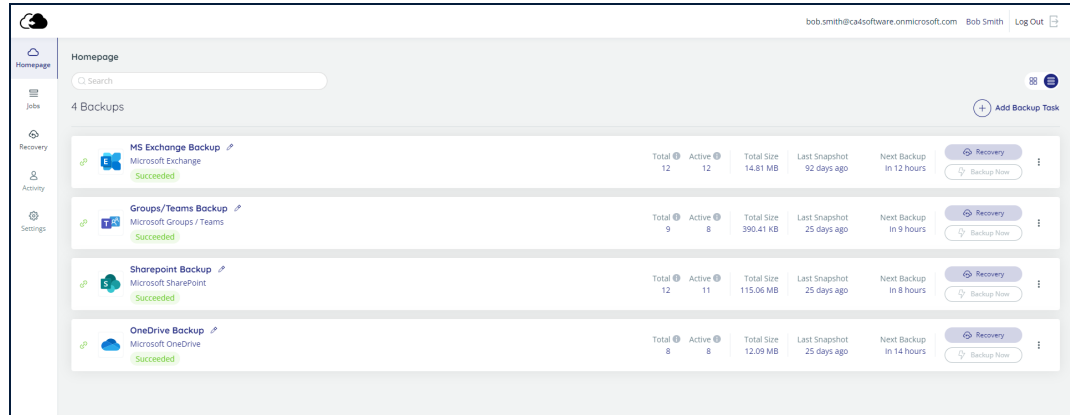
2. Click the particular Microsoft 365 icon from the list or enter a keyword in the Search field to find a specific task. The *Microsoft 365 Backup* page is displayed.

3. Click **Settings** ⚙ on the top-right section of the screen to see the backup settings.
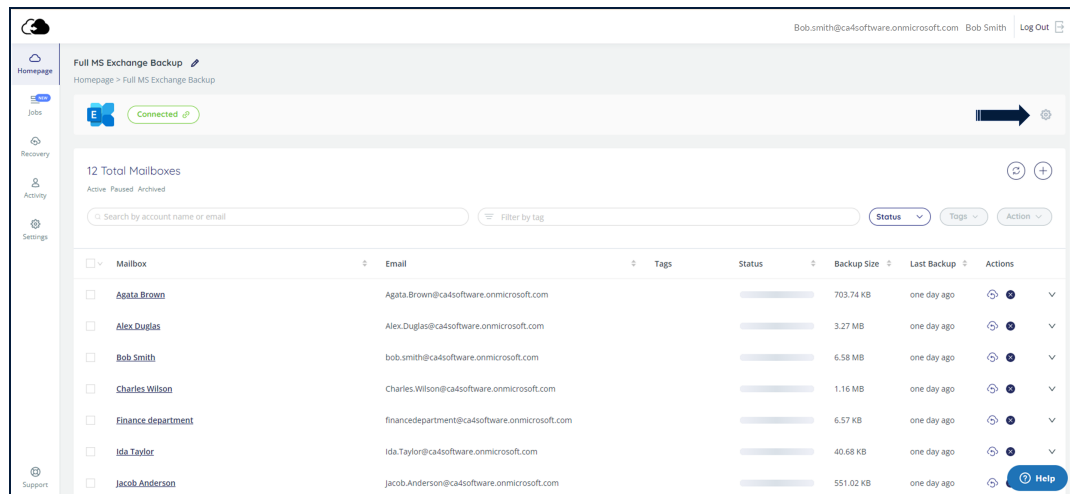
From here, it is possible to modify the fields described in ["Configuring a BAckup Task: Microsoft Exchange."](#)

3.1.7   Removing a Backup

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

3.1.7.1   Removing an Entire Backup Service

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

Microsoft 365 Exchange

The Confirm Delete pop-up window is displayed with a warning message.
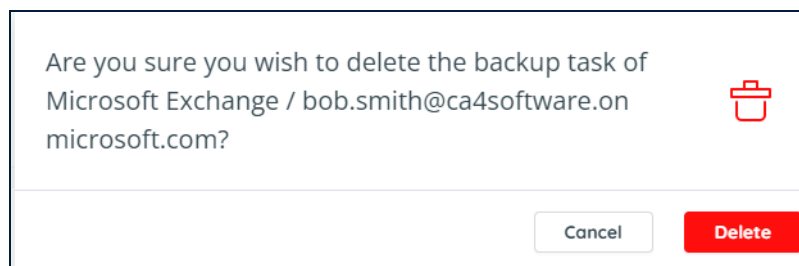
Click **Delete**. The selected backup service is removed from your account.

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

3.1.7.2   Removing an Individual Account, Team or Site

1. Click the backup service from which you want to remove the account, team or site. The backup task settings page is displayed.

2. Add a check next to the item that you want to remove. Click **Delete** in the

Actions menu.
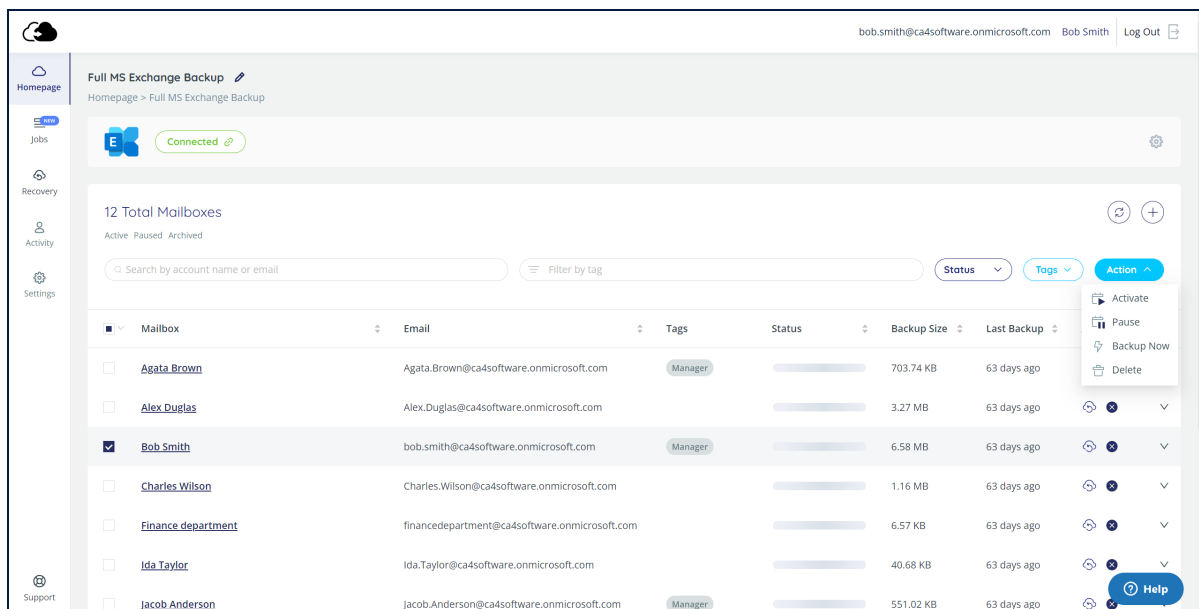
4. A pop-up window is displayed with a list of accounts selected for removal. Click **Delete**. The selected account, team or site are removed from your account.
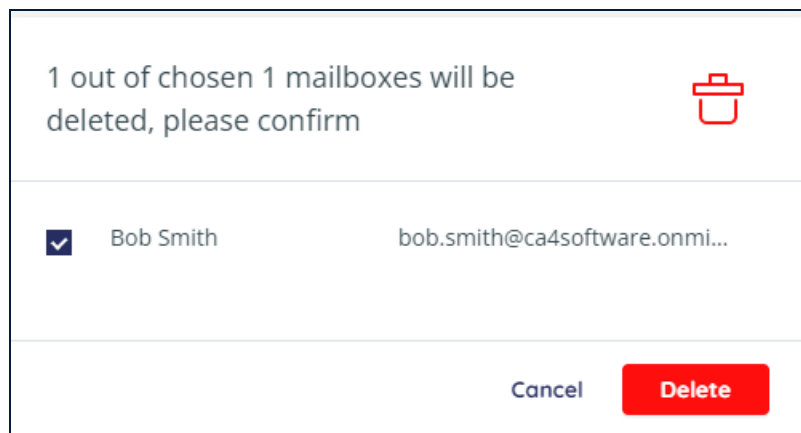
To prevent mistaken deletions, there is a grace period of 7 days after your backup is deleted.

3.2 Microsoft 365 OneDrive

3.2.1 Adding a OneDrive Backup Task

To create a new CloudAlly backup task:

1. Sign in to your Account, or if you are already signed in, click the **Homepage** option in the Navigation Panel.

2. On the Homepage, click **+ Add Backup Task**.

The *Activate A New Backup* page is displayed:

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

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

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

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

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

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

3.2.2   Configuring a OneDrive Backup Task
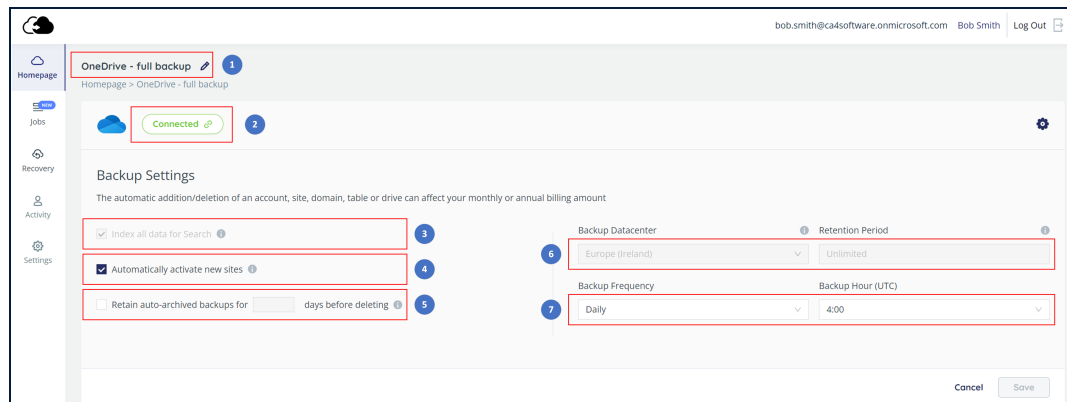

1. You can change the name of the backup task by clicking ✎ .

2. The icon to the right of the Microsoft 365 logo displays whether the application was able to connect to the specified Microsoft 365 account. If the authentication token granted for the application becomes invalid (e.g., it expires due to inactivity because you put the backup task on pause for a long time), the green Connected icon changes to the red Disconnected. To grant the application a new token, click on the icon to open the authentication dialog, and repeat the authentication process.

3. By default, the "Index all data for Search" option is selected, which enables CloudAlly to provide you with its granular search and restore functionality. In the process, your data is temporarily decrypted for a brief period of time, and then re-encrypted once the index is built. If this goes against your company policy and you would like to disable automatic indexing, please contact support@cloudally.com.

4. The Automatically activate new sites option instructs the system to detect new teams and groups, and activate them automatically.

5. Backups are automatically archived when an entire site is deleted. The **Retain auto-archived backups** option allows you to retain them for a specified number of days, after which they will be deleted. Otherwise, the backups will be retained indefinitely.

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

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

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

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

7. **Backup Frequency and Backup Hour**

    a. Click the drop-down list adjacent to the **Backup Frequency** field and select how often you would like the backups to occur. The available options include:

        i.   Daily

        ii. Every 3 days

        iii. Weekly

    b. Click the drop-down list adjacent to the **Backup Hour (UTC)** field and select the backup hour. Click **Save**

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

3.2.3   Activating a Backup Task

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

For instructions, see "[Activating Your Backups.](#)"

3.2.4   Modifying the Settings of an Existing Backup

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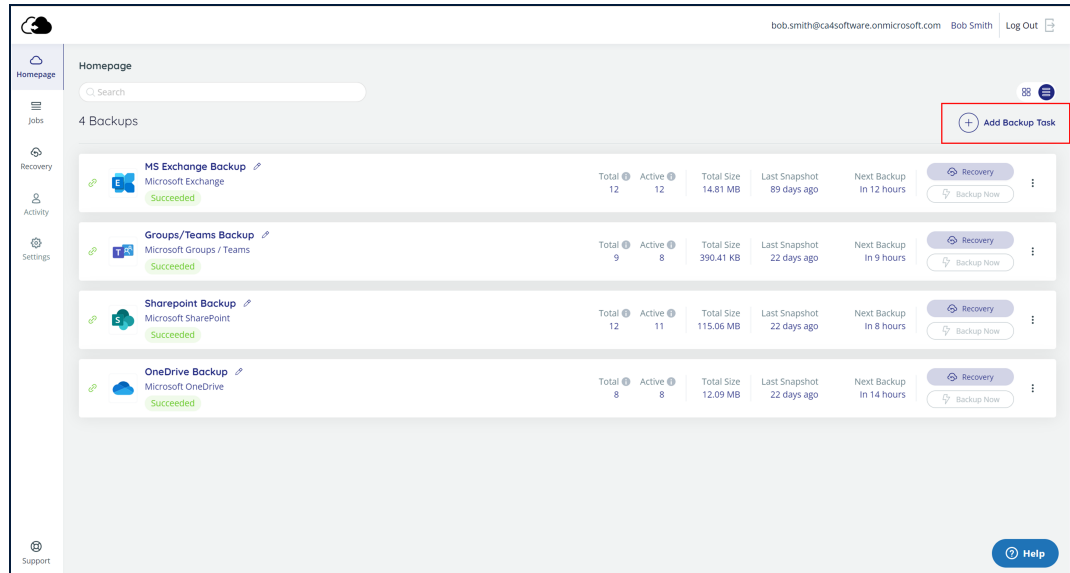
3.2.5   Removing a Backup

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

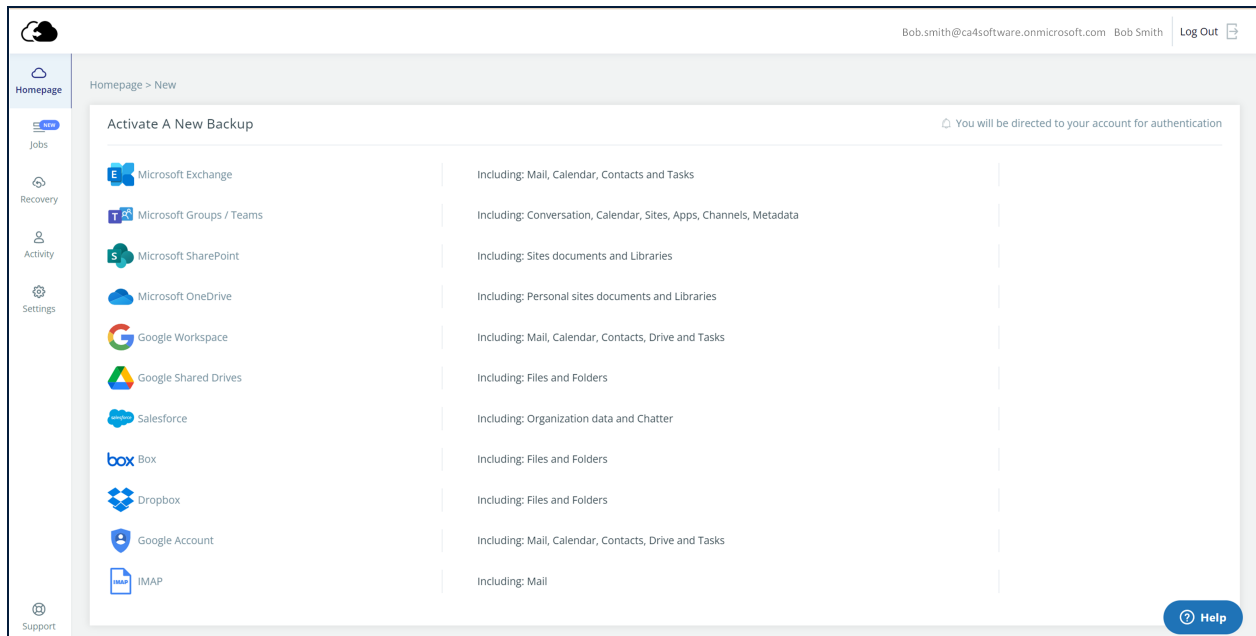## 3.3   Microsoft 365 SharePoint

3.3.1   Adding an Microsoft 365 SharePoint Backup Task

To create a new CloudAlly backup task:

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

MS 365 CE 22.4.1

CLOUDALLY
an **opentext** company
     Visit our [Customer Support Hub](#)
     Rev. Date: December 4, 2022

The *Activate A New Backup* page is displayed:

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

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

2. Add the SharePoint URL.

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

3. You will see the OAuth based authorization Click **Authenticate** to start the process of granting the access token. You will be redirected to the *Microsoft sign-in* page. Enter Global Admin credentials to sign in to your Microsoft account.
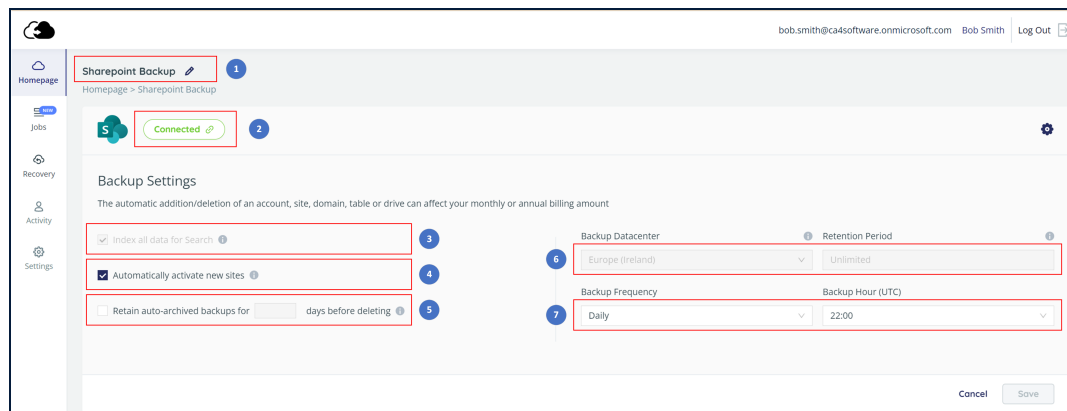
> **IMPORTANT!**
>
> The user that you enter **must** have Global Admin permissions.

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

3.3.2   Configuring an Microsoft 365 SharePoint Task

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

1. You can change the name of the backup task by clicking ✏ .

2. The icon to the right of the Microsoft 365 logo displays whether the application was able to connect to the specified Microsoft 365 account. If the authentication token granted for the application becomes invalid (e.g., it expires due to inactivity because you put the backup task on pause for a long time), the green Connected icon changes to the red Disconnected. To grant the application a new token, click on the icon to open the authentication dialog, and repeat the authentication process.

3. By default, the "Index all data for Search" option is selected, which enables CloudAlly to provide you with its granular search and restore functionality. In the process, your data is temporarily decrypted for a brief period of time, and then re-encrypted once the index is built. If this goes against your company policy and you would like to disable automatic indexing, please contact support@cloudally.com.

4. The Automatically activate new sites option instructs the system to detect new teams and groups, and activate them automatically.

5. Backups are automatically archived when an entire site is deleted. The **Retain auto-archived backups** option allows you to retain them for a specified number

Visit our Customer Support Hub

of days, after which they will be deleted. Otherwise, the backups will be retained indefinitely.

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

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

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

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

7. **Backup Frequency and Backup Hour**

   a. Click the drop-down list adjacent to the **Backup Frequency** field and select how often you would like the backups to occur. The available options include:

      i. Daily

      ii. Every 3 days

      iii. Weekly

   b. Click the drop-down list adjacent to the **Backup Hour (UTC)** field and select the backup hour. Click **Save**

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

3.3.3   Activating a Backup Task

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

For instructions, see "[Activating Your Backups.](#)"

3.3.4   Modifying the Settings of an Existing Backup

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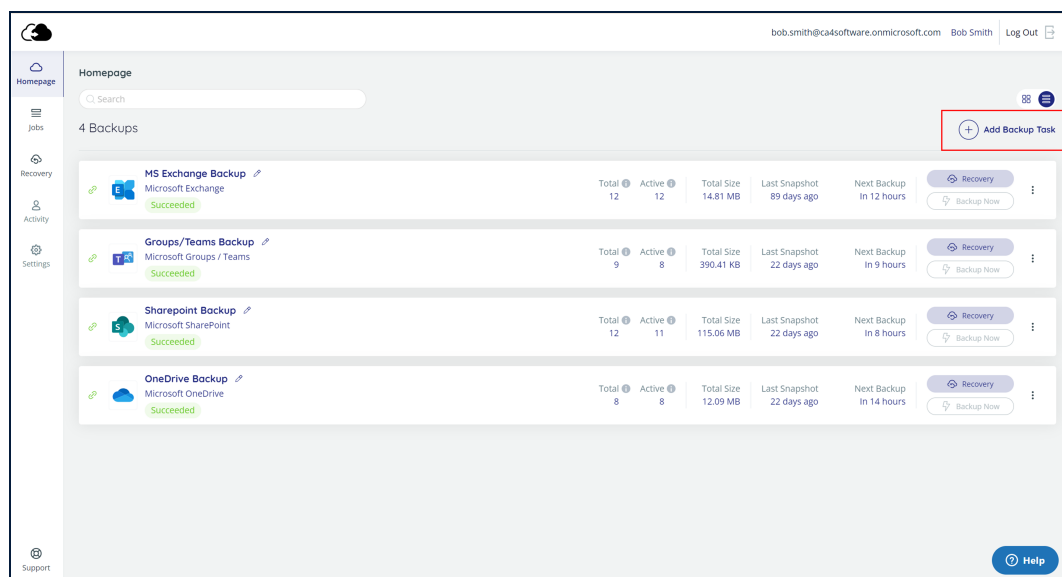
3.3.5   Removing a Backup

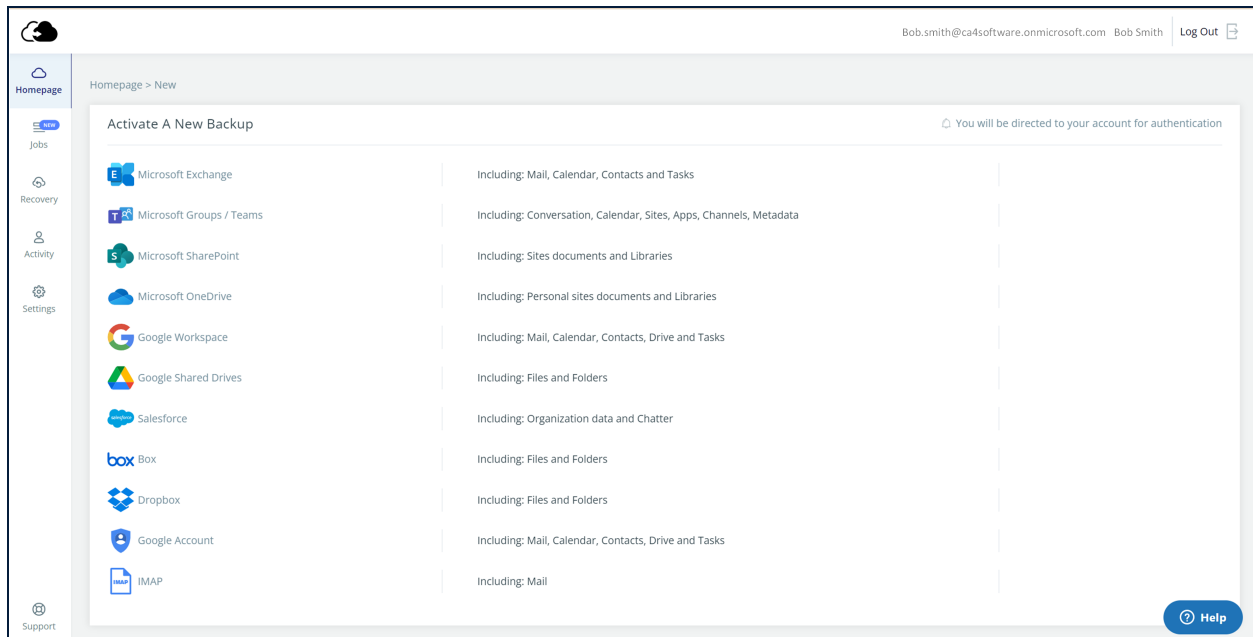See instructions in ["Removing a Backup."](#)

3.4   Microsoft 365 Teams & Groups

3.4.1   Adding an Microsoft 365 Teams & Groups Backup Task

To create a new CloudAlly backup task:

1. Sign in to your Account, or if you are already signed in, click the **Homepage** option in the Navigation Panel.

2. On the Homepage, click **+ Add Backup Task**.

The *Activate A New Backup* page is displayed:

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

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 CloudAlly support.

3.4.2   Configuring an Microsoft 365 Teams & Groups Backup Task

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

1. You can change the name of the backup task by clicking ✎ .

2. The icon to the right of the Microsoft 365 logo displays whether the application was able to connect to the specified Microsoft 365 account. If the authentication token granted for the application becomes invalid (e.g., it expires due to inactivity because you put the backup task on pause for a long time), the green Connected icon changes to the red Disconnected. To grant the application a new token, click on the icon to open the authentication dialog, and repeat the authentication process.

3. By default, the "Index all data for Search" option is selected, which enables CloudAlly to provide you with its granular search and restore functionality. In the process, your data is temporarily decrypted for a brief period of time, and then re-encrypted once the index is built. If this goes against your company policy and you would like to disable automatic indexing, please contact support@cloudally.com.

4. The Automatically activate new groups/teams option instructs the system to detect new teams and groups, and activate them automatically.

5. Backups are automatically archived when an entire site is deleted. The **Retain auto-archived backups** option allows you to retain them for a specified number of days, after which they will be deleted. Otherwise, the backups will be retained indefinitely.

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

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

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

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

7. **Backup Frequency and Backup Hour**

a. Click the drop-down list adjacent to the **Backup Frequency** field and select how often you would like the backups to occur. The available options include:

          i. 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.

3.4.3   Activating a Backup Task

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

For instructions, see "[Activating Your Backups.](#)"

3.4.4   Modifying the Settings of an Existing Backup

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

3.4.5   Removing a Backup

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

4   Recovering Your Backed Up Data

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

1. There are two ways to perform a one-click full mailbox recovery:

    a. From the Homepage, on the Microsoft 365 backup that you would like to restore or export, click **Recovery.**

    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.
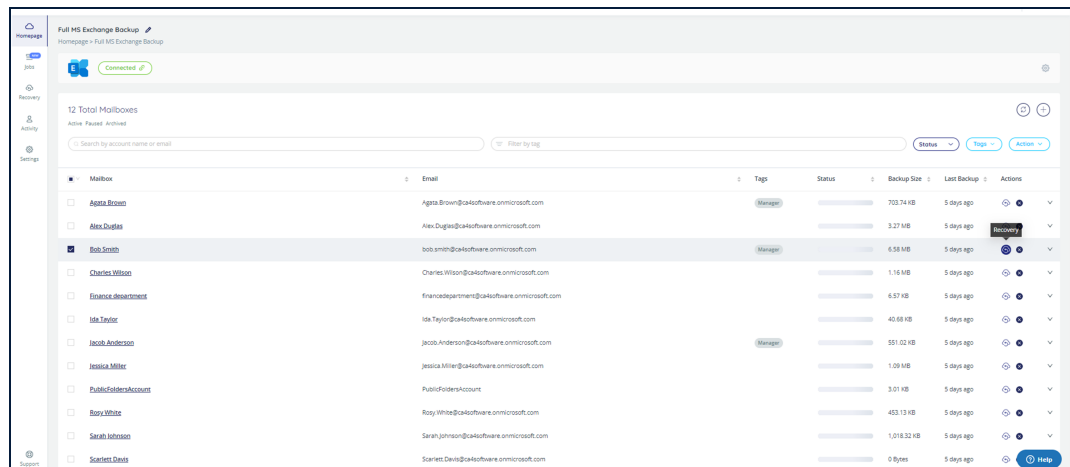
3. Click **Full Mailbox Recovery**.
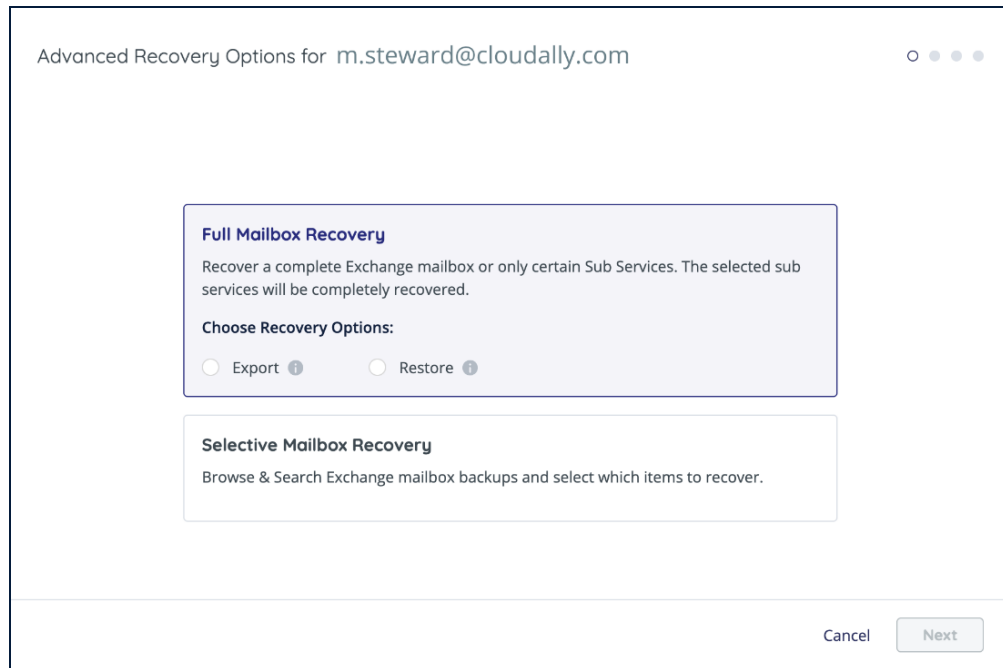
The subsections below explain about the two options: Export or Restore.

4.1.1   Exporting Your Backed Up Data

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

CLOUDALLY
an **opentext** company

Visit our Customer Support Hub
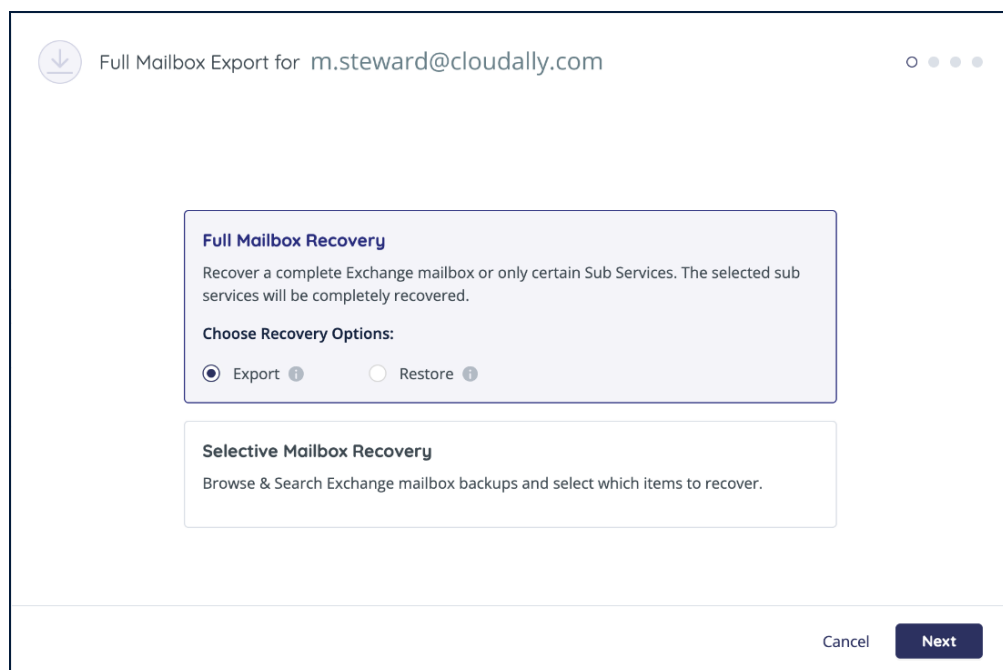
2. Choose the backup you want to export.

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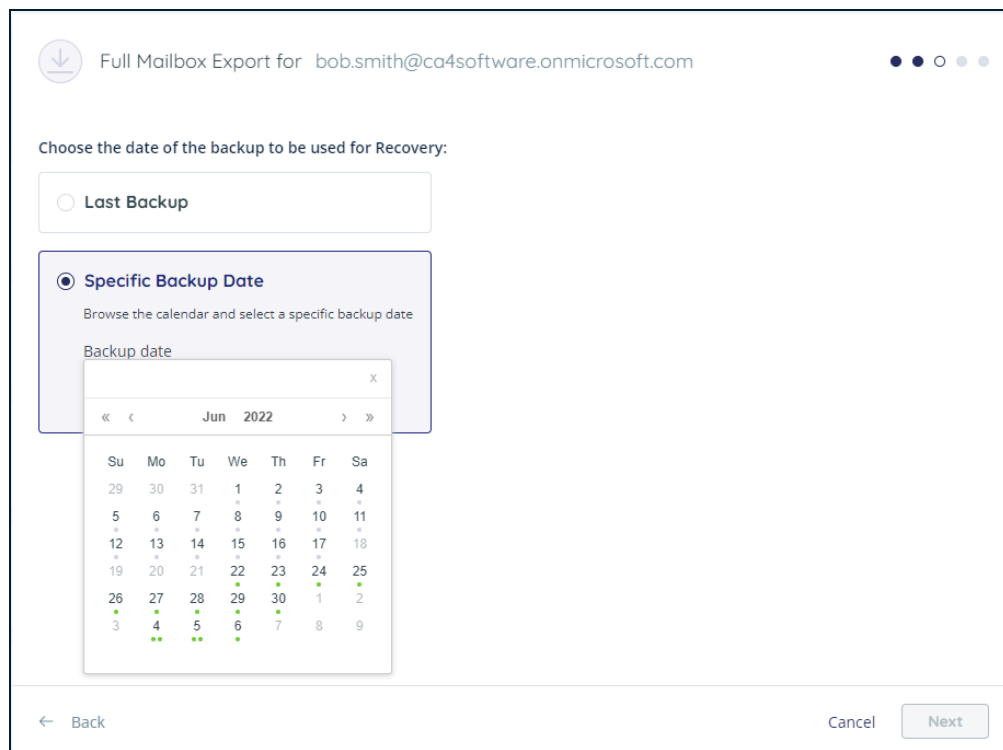
Dot Color		Meaning
🟢	Green	Successful backup
🟠	Orange	Partially successful backup
🟢🟢	Two dots	Multiple backups on that date

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.
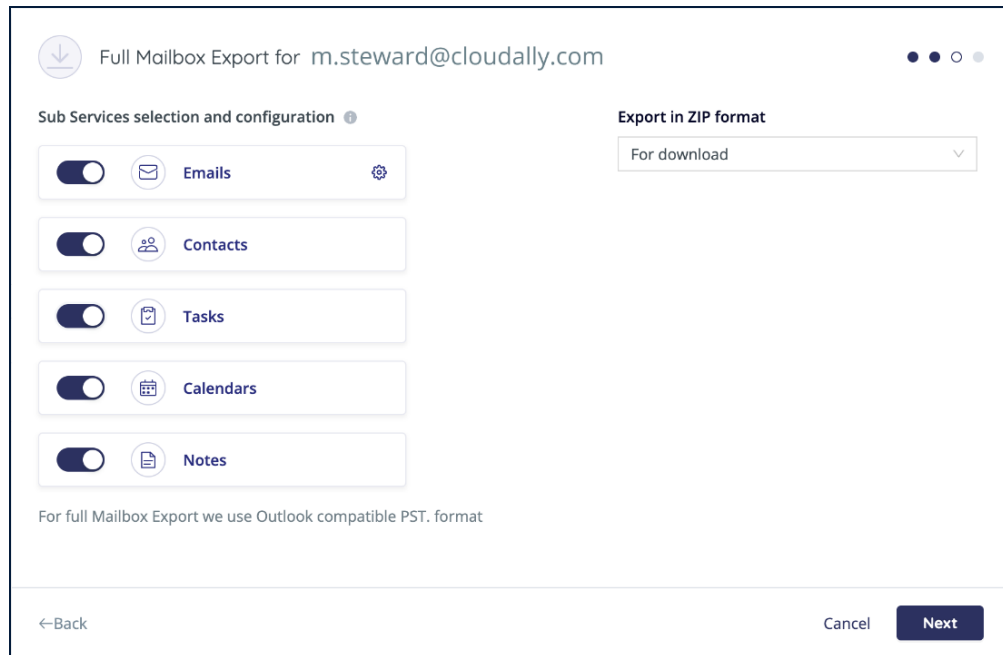
4. Select the settings icon ⚙ next to the Emails sub-service. The following options are available:

    a. **Legal holds**: Choose this option if you want to export all legal / litigation holds placed on this mailbox using Microsoft's Exchange Online Archive (EOA) service.

    b. **Export deleted items**: recover items that were deleted in the past, even those that are no longer in the Deleted or Recoverable Items folders.

    c. **Use 20 GB chunks for .ps**t: 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.

Visit our Customer Support Hub
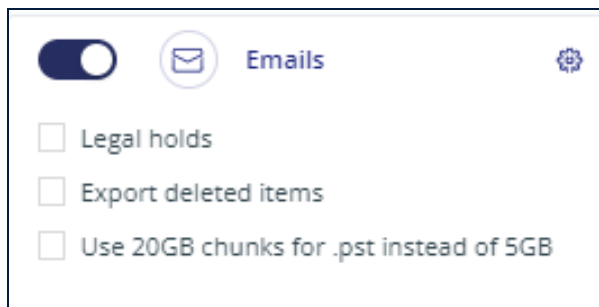
5. Select the export ZIP destination, such as direct download, Amazon S3, Azure Blob, Box, Dropbox, AWS S3 Compatible (if you are bringing your own storage) or Google Cloud Platform. Depending on which option you choose, there will be other data to complete (e.g., Bucket Name, Access Key and Secret Key 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**.)
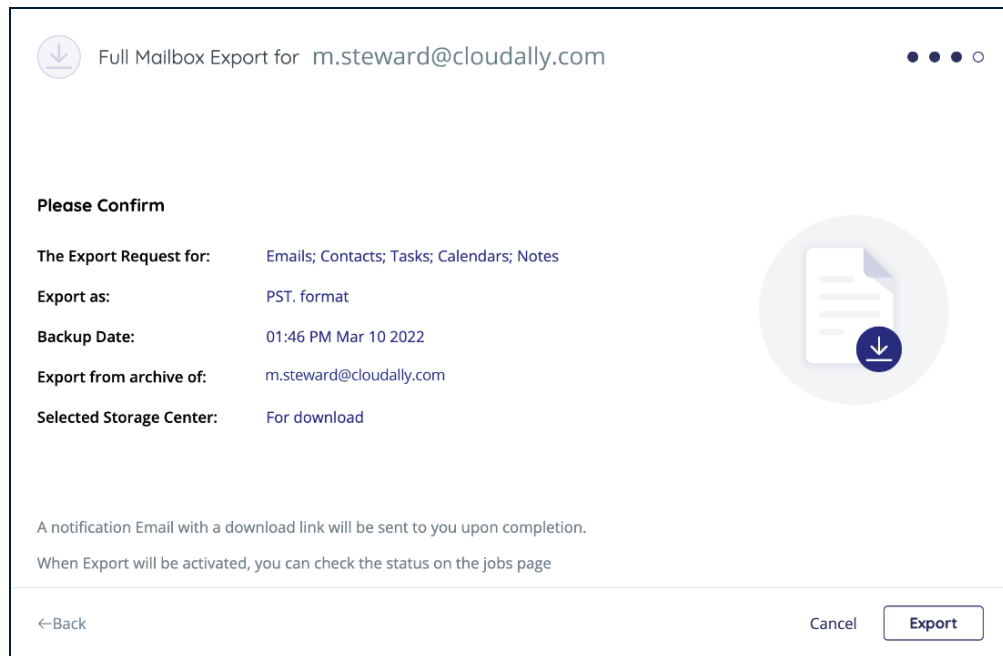
7. Check the *Jobs* page to track the progress of your job. See "Tracking Recovery Tasks on the Jobs Page" on page 73 for details.

8. When the export is complete, click **Download Results**.
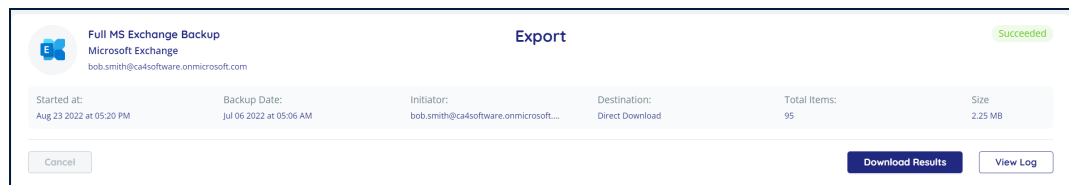
A new page will open which will enable you to download your data file.
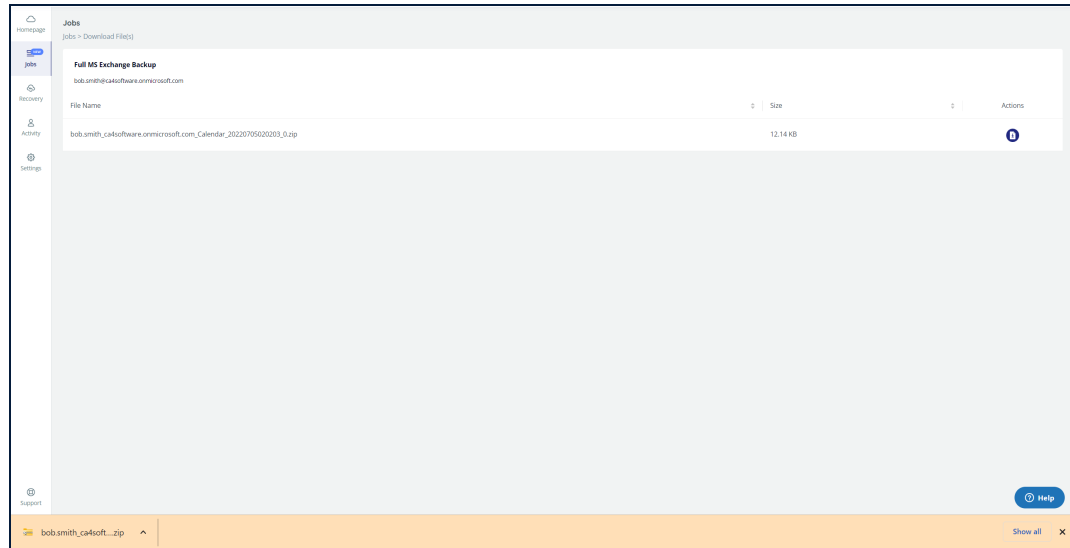
4.1.2 Restoring Your Backed Up Data

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.

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

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.
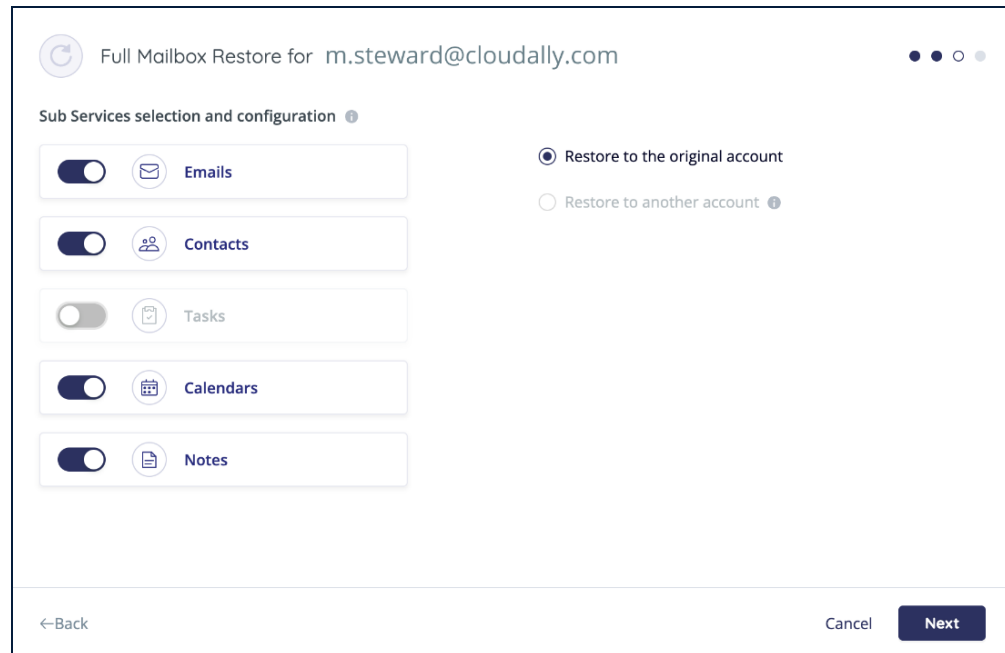
4. Choose where to restore your backup to:

    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. 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**.)

6. Check the *Jobs* page to track the progress of your job. See "Tracking Recovery Tasks on the Jobs Page" for details.

7. After the restore task completes, you will receive a Confirmation Report by email.

4.2   Microsoft 365 Exchange: Using the New Recovery Page

4.2.1   Navigating to the Recovery Page

There are two ways to get to the recovery page:

■   From the *Homepage*, locate a backup task, and click its name.
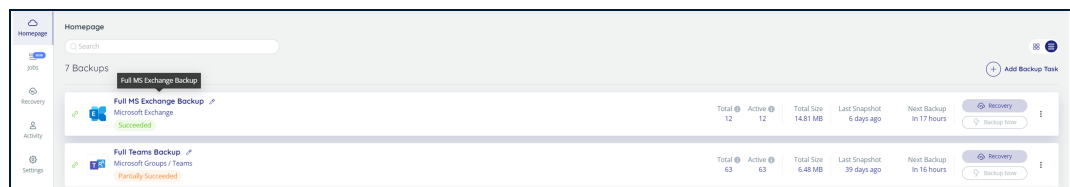
■   And then click the name of the mailbox.
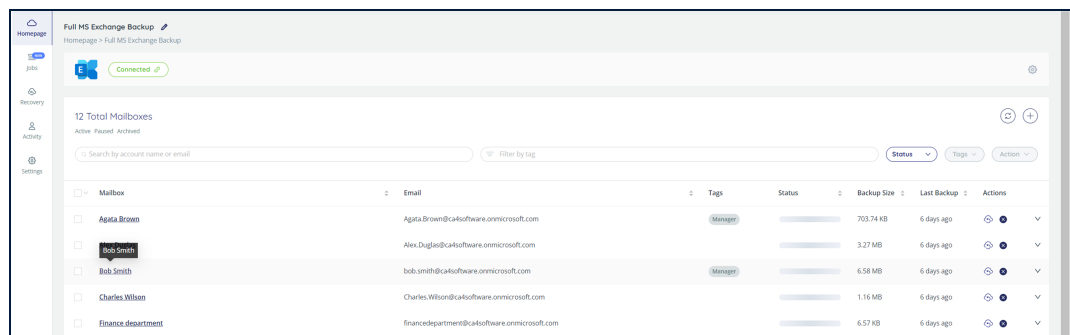
■   Or, if you are on the home page, click **Recovery**

- 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**
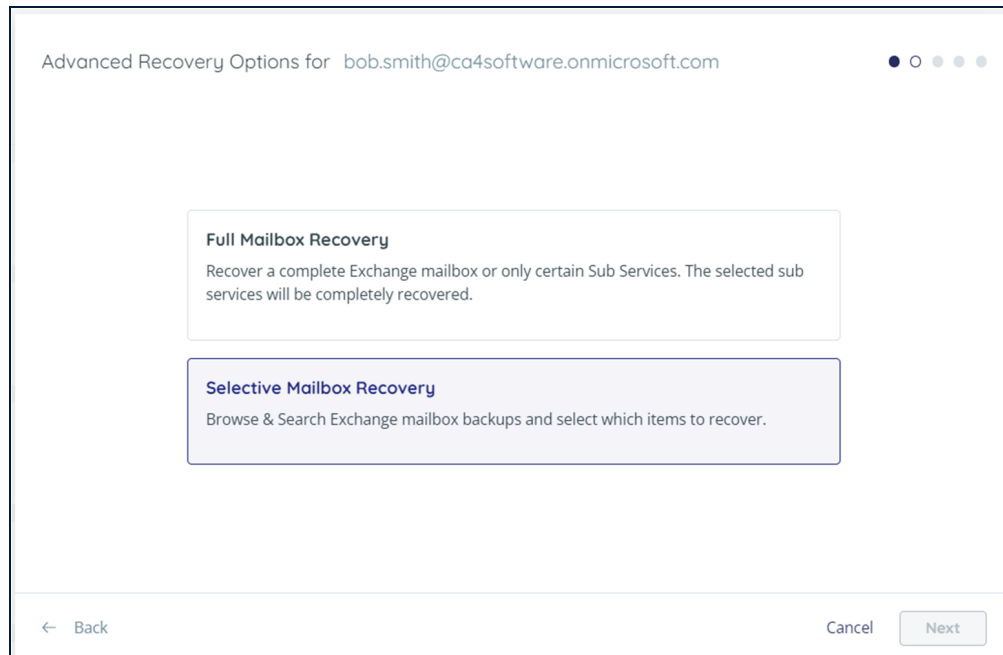
4.2.2 Choosing a Backup Date

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.
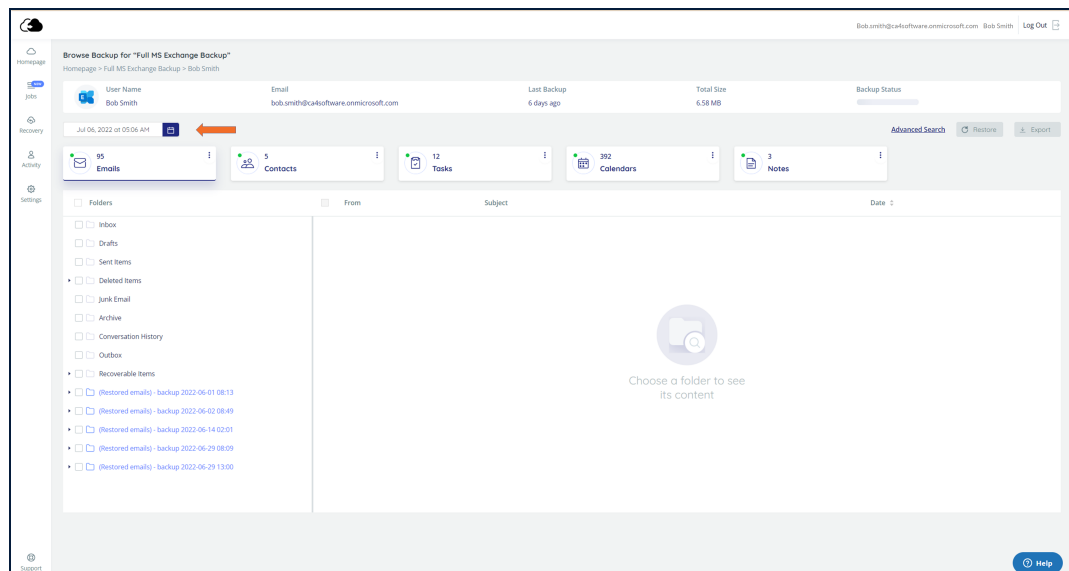
The green dots indicate that one or more successful backups were performed on that day, and an orange dot indicates a partial backup. Two dots indicate that multiple backups were performed on that day.
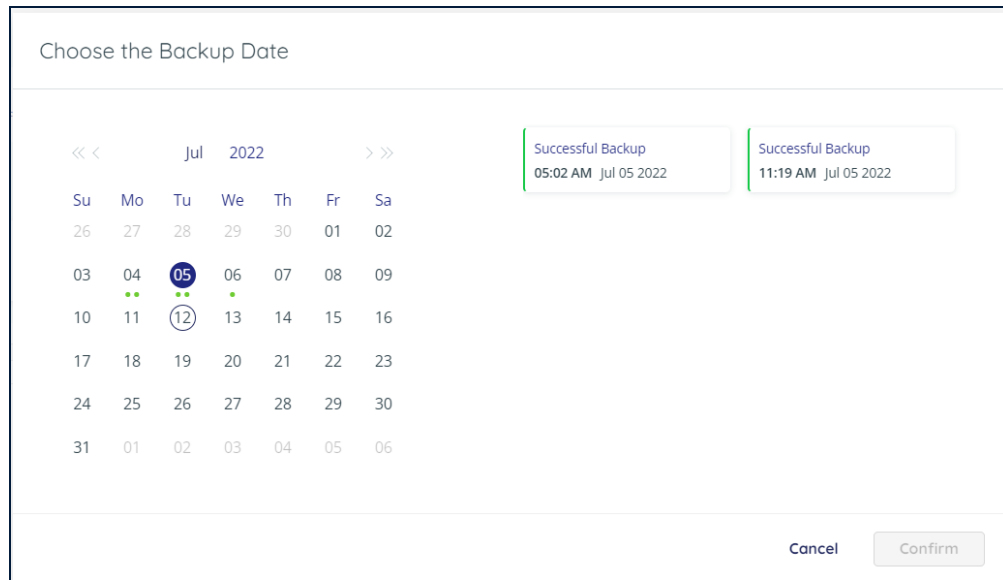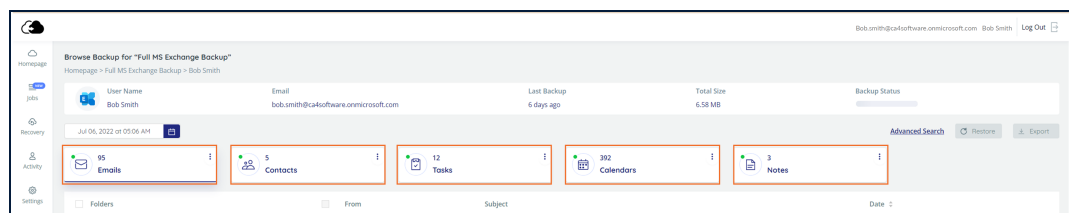
Dot Color		Meaning
🟢	Green	Successful backup
🟠	Orange	Partially successful backup
🟢🟢	Two dots	Multiple backups on that date

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

4.2.3   Browsing Your Backups

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

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

■   Each of the cards also has a green or red status indicator, which lets you know whether the sub-service was successfully backed up.

Choosing Items to Restore or Export

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

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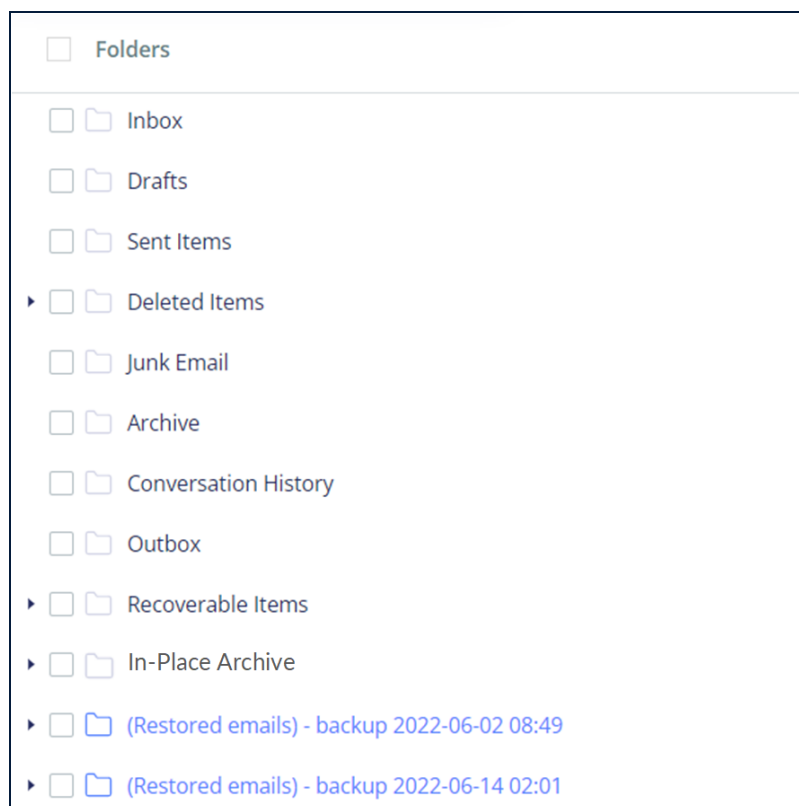

In addition to the usual folders, such as Inbox, Sent Items, and Deleted Items, at the bottom of the list you will find the Recoverable Items folder, and the In-Place Archive folder (if it has been activated) followed by the CloudAlly Restored folders with a blue label.

4.2.3.1   Email

- Select the Inbox to see its contents.
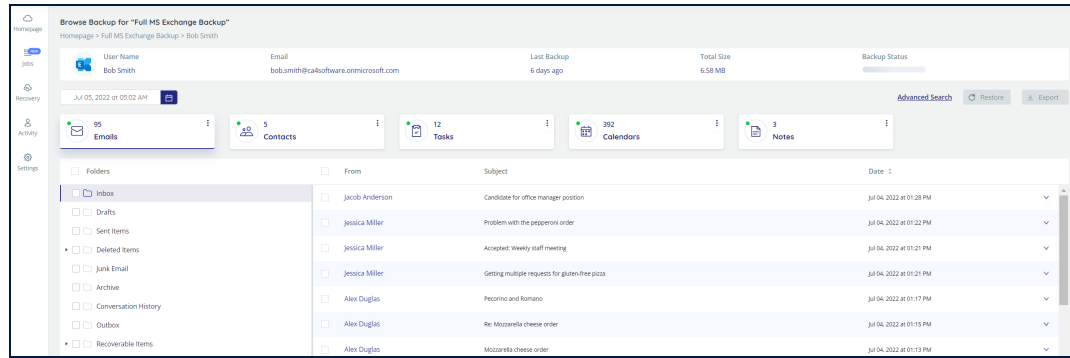
- You can choose one or more messages, or you can choose the entire Inbox.

    - To restore everything, all of the folders and their contents, click **Folders**.

   - Or, select the menu in the Email card, and then **Select All**.
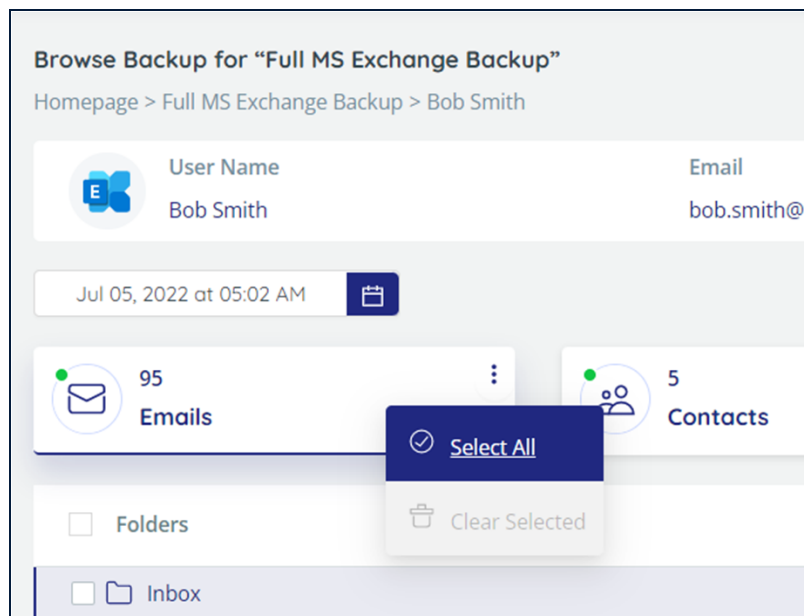
- If you looking for a specific email, click the arrow of the email to see the first line of the message.

> **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 CloudAlly account administrator.

Visit our Customer Support Hub
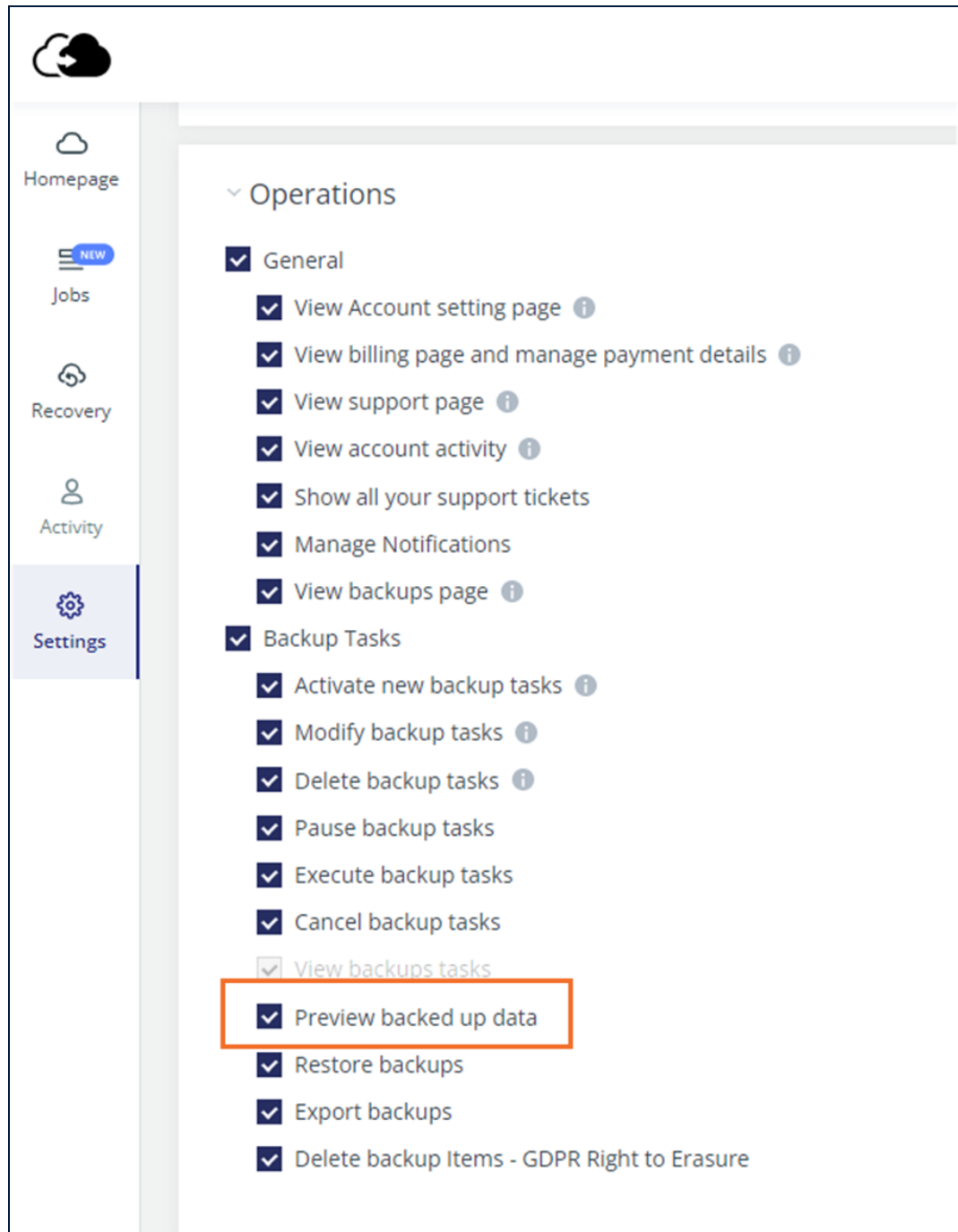
4.2.3.2   Contacts

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.
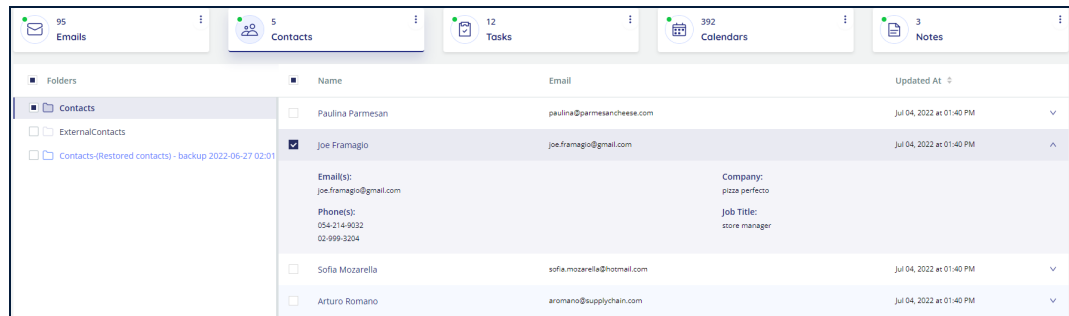
4.2.3.3   Tasks

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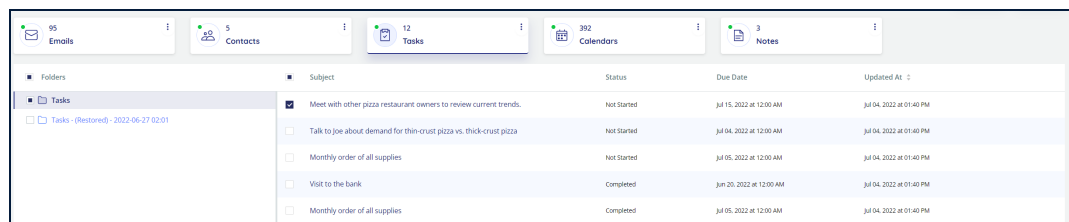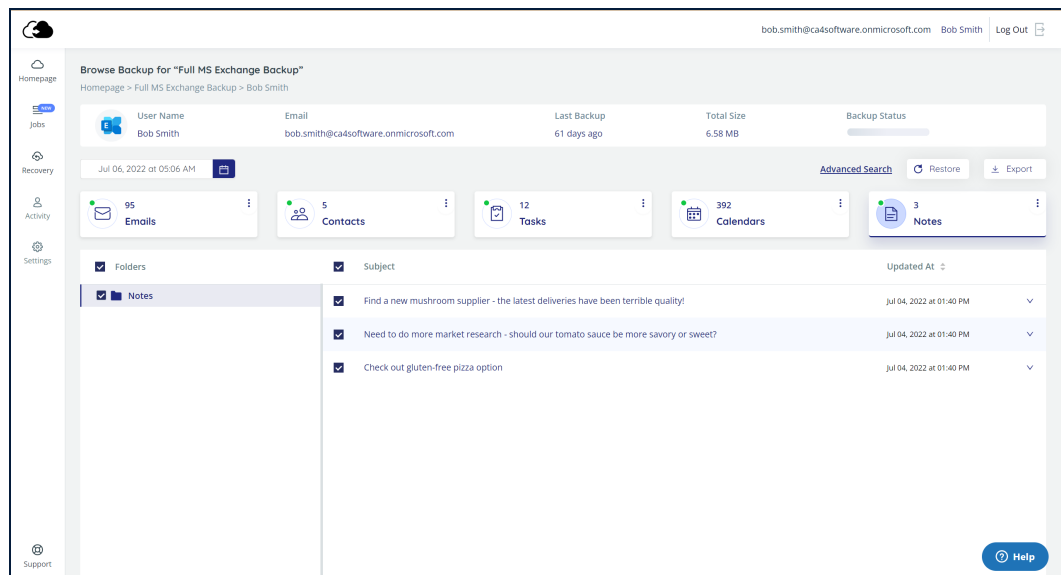

4.2.3.4   Calendar

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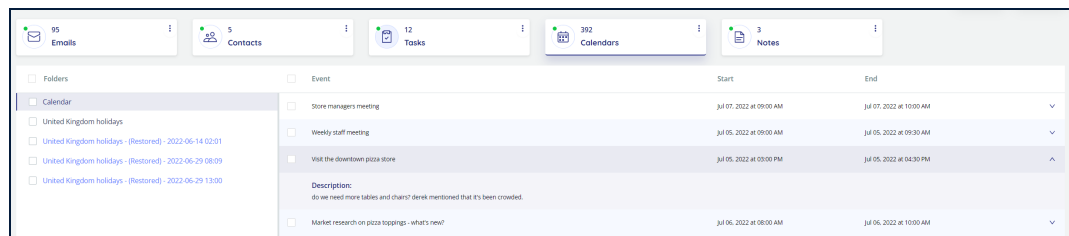
4.2.3.5   Notes

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

If you are restoring your Emails. you will see the following screen:
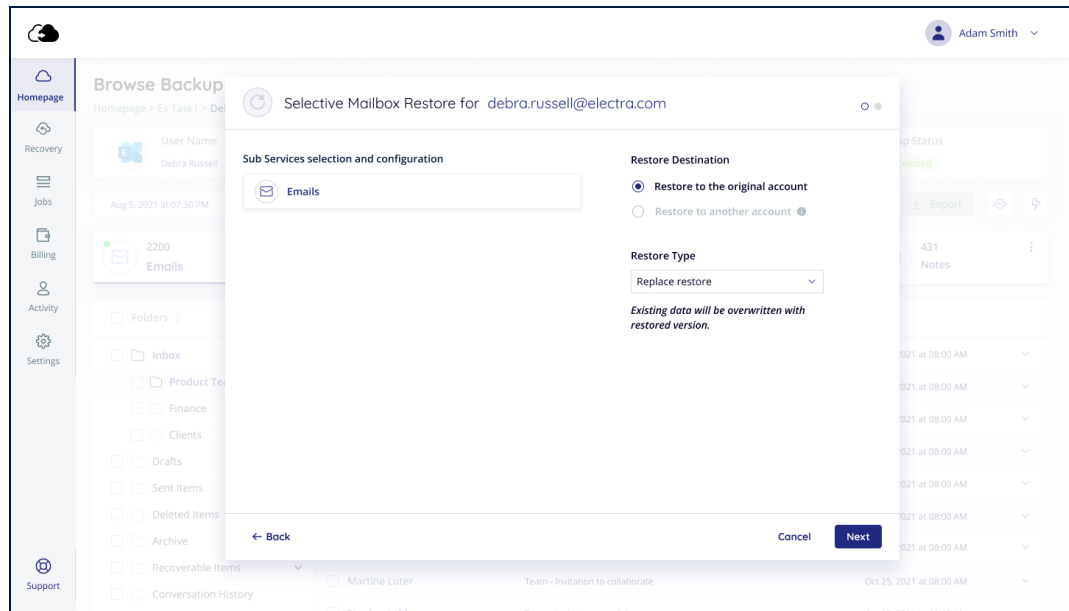
Restore Destination

You you will have the option of:

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

Restore Type

You will have the option of:

- **Non-destructive restore**
- **Replace restore**: Emails that are in the live account are over-written by emails in the snapshot version.

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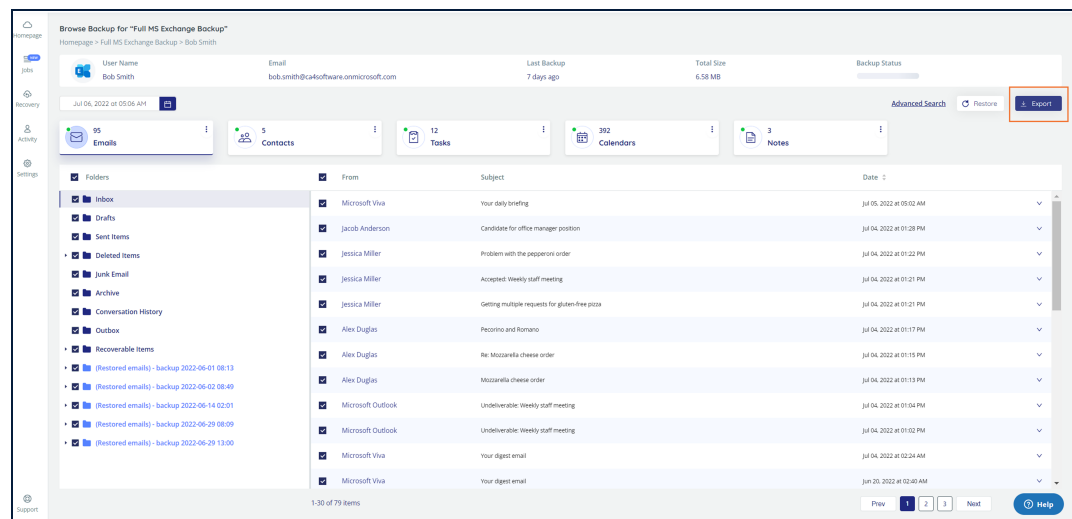
■   When you export multiple sub-services, the format will be a single PST file.
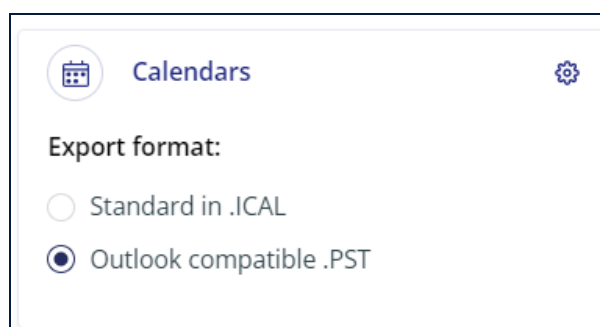

■   When you export a single sub-service, you can choose to customize the export format in the following ways.

   •   If you click the settings icon ⚙ next to the Email sub-service, you can choose the export format: EML or PST.

- You can also choose to have larger, 20 GB .pst files, instead of 5 GB files.
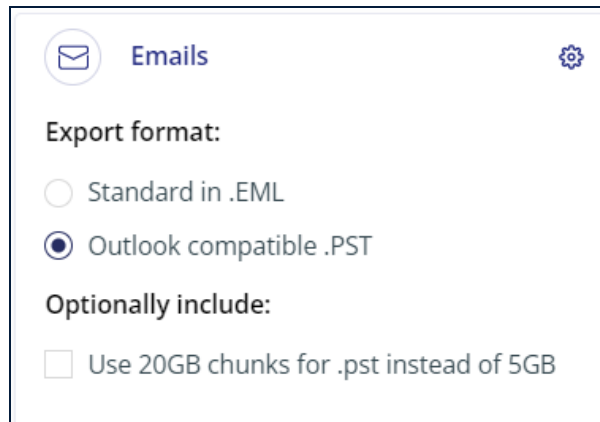
- The settings icon ⚙ next to calendars allows you to choose the format of the download file: iCAL or PST.

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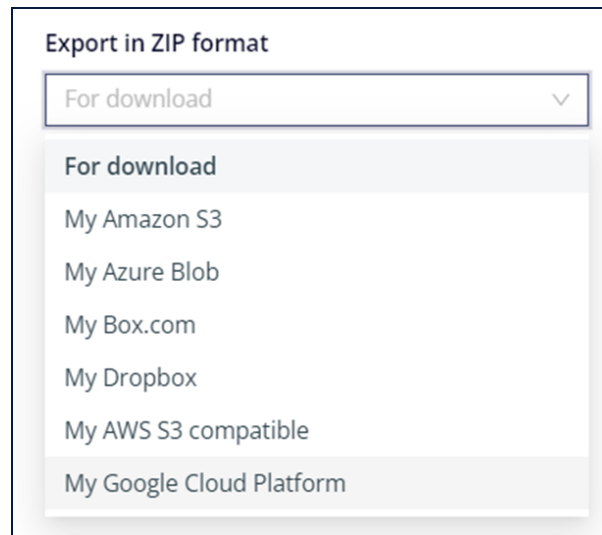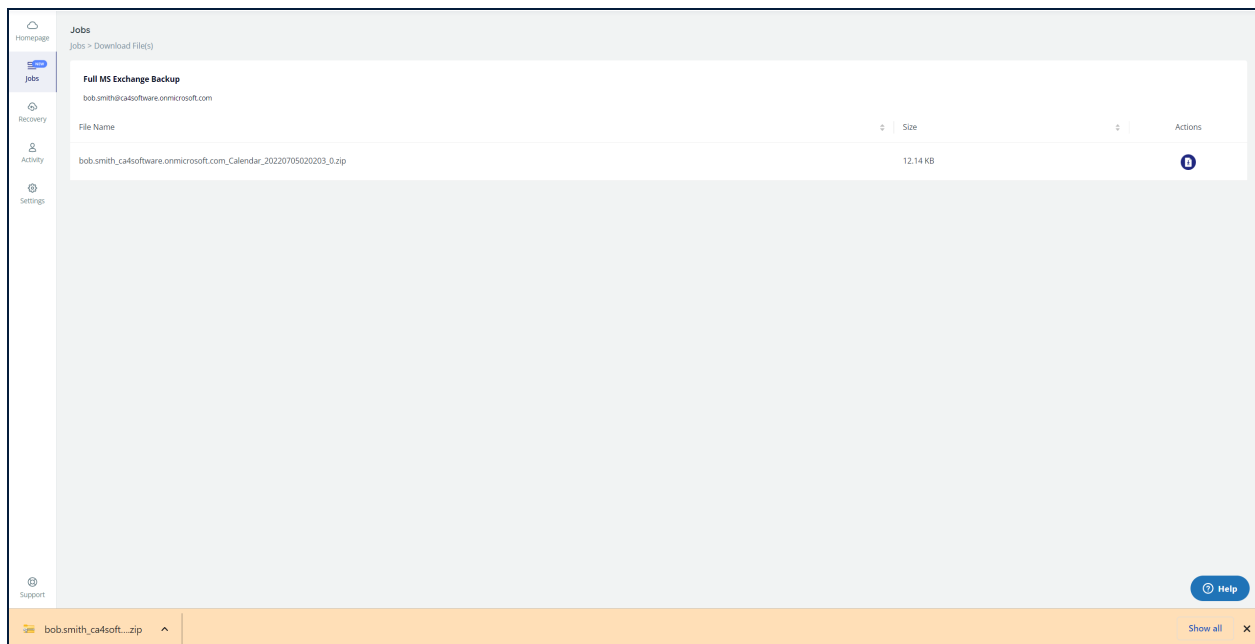

> **Note:** The default "for download" option exports the file to your local storage device.

- ■ Check the *Jobs* page to track the progress of your job. "Tracking Recovery Tasks on the Jobs Page" on page 73

- ■ When the export is complete, click **Download Results**.
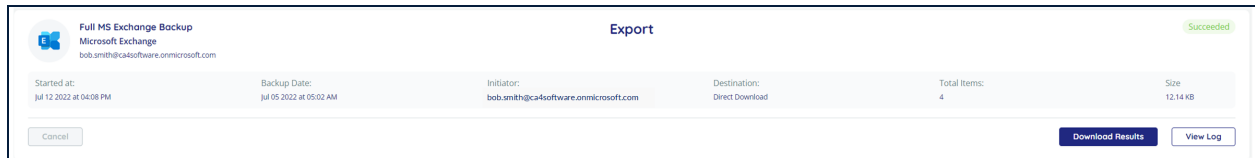
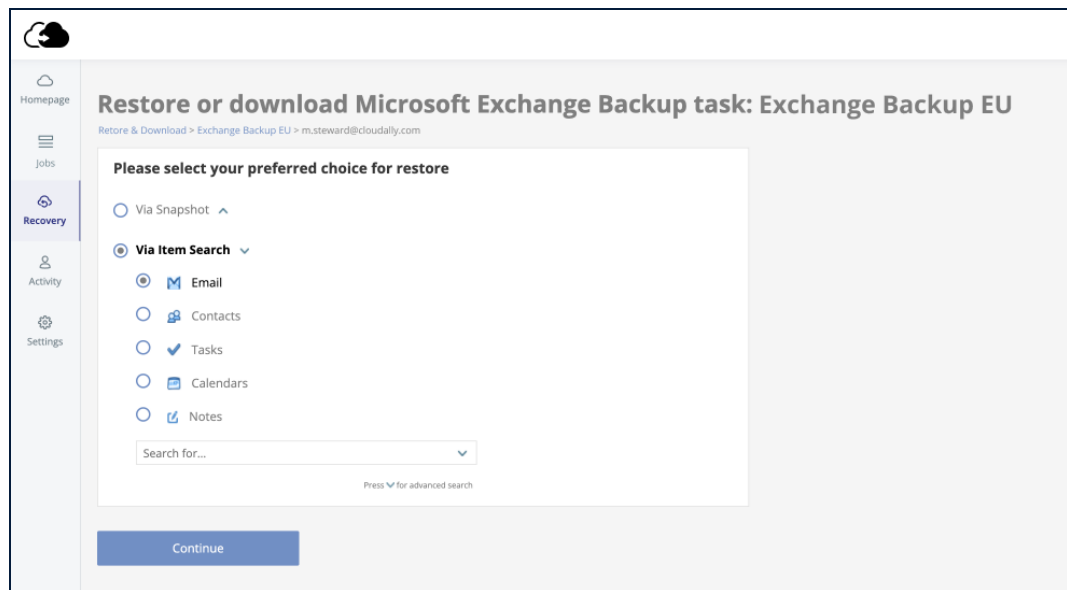A new page will open which will enable you to download your data file.

4.2.6 Advanced Search

To perform a granular, keyword search, click **Advanced Search**.
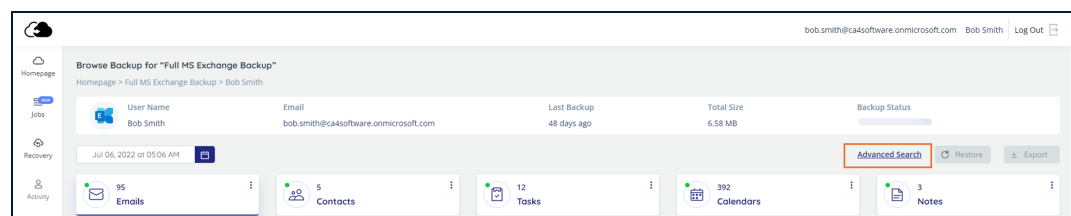
You will see the following screen:

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

- **Email** – Enter a keyword in the Search for field. For advanced search options, click ⌄ and provide the following details in the drop-down form:

  - **From**: Enter a name or email address from which the email was received.

  - **To**: Enter a name or email address to which the email was sent.

  - **Subject**: Enter a keyword that matches any text in the email subject.

  - **Date from / Date to**: Enter the date range of the emails you would like to restore.

- **Contacts**: Enter a name in the Search for field.

- **Tasks**: Enter a keyword in the Search for field.

- **Calendars**: Enter a keyword in the Search for field. For advanced search options, click ⌄ and provide the following details in the drop-down form:

  - **Description**: Enter all or part of the event description.

  - **Owner**: Enter the user name or the email address

  - **Date from / Date to**: Enter the date range of the calendar you would like to restore.

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

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

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

To recover your backed up data:

1. Click **Recovery** from the Navigation Panel. The *Restore & Download* page is displayed with all your active-backup account details.
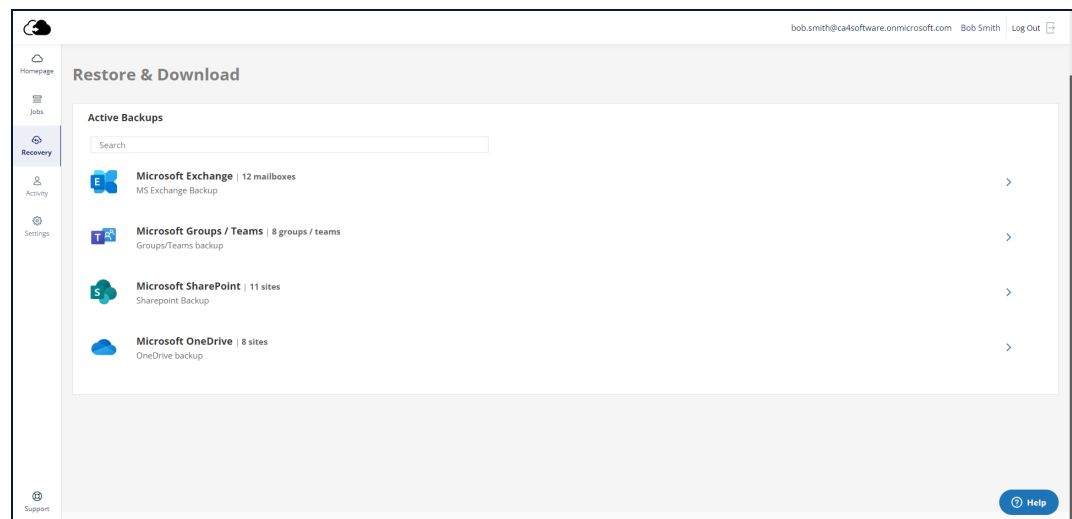
2. Click the OneDrive or SharePoint backup task from which you wish to recover the data. The *Restore or Download Active Mailboxes* page is displayed.
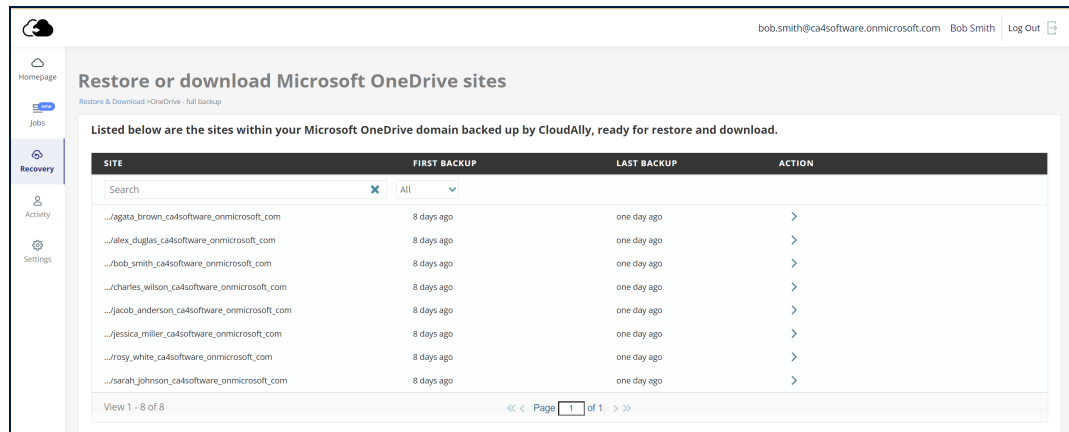
This page displays all your OneDrive and SharePoint domains backed up with the details such as Site name, First Backup date, Last Backup date, and available Actions. Your backed-up data is ready for download, from this page.

■ You can filter the list using the following options:

- Filter by statuses such as All, Active, In Process, Not Active, Scheduled, Paused, Backed-up in another task, or Archived, from the drop-down list.

- Or: search by part or all of the Site name.

■ Click the › icon at the end of the line of the site which you want to restore or export (download).

The *Restore or download Microsoft* page is displayed.
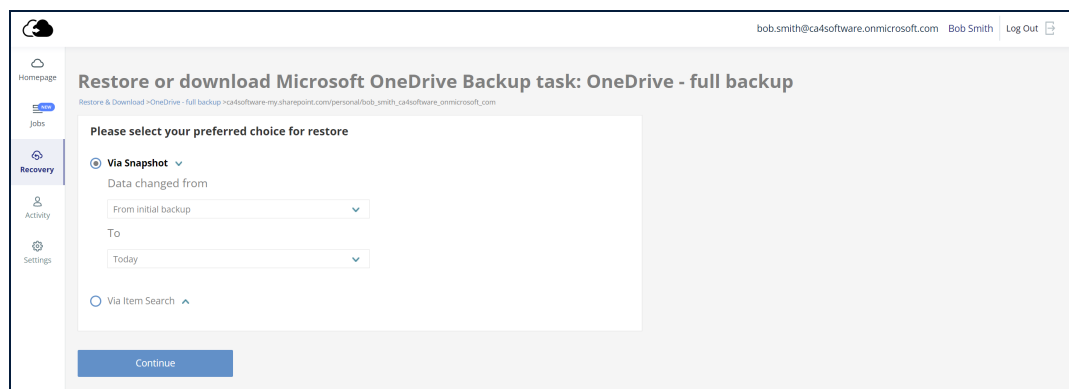
■ Select the radio button for your preferred restore method:

- Via Snapshot (see [Via Snapshot)](#)

- Via Item Search (see [Via Item Search](#))

4.3.1   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.
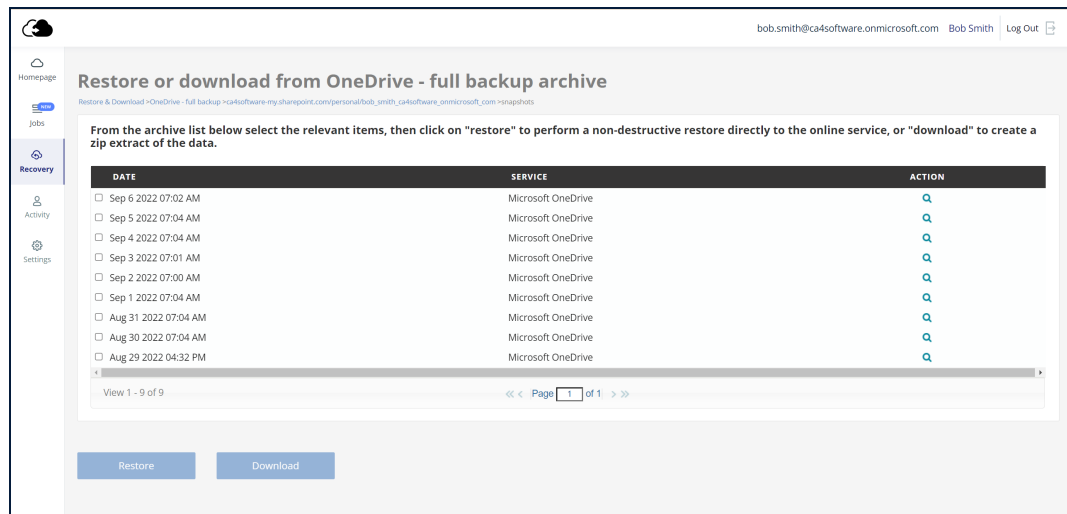
3. Alternatively, you can click 🔍 in the Action column to drill down into the snapshot and view the structure of the backed up data. There you can select one or more items for recovery.

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.

4.3.1.1   Restore - **OneDrive or SharePoint**

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

   a. Do you want to restore to another tenant? If so, provide the address of the administrator, the password, and the site to restore to.

b. 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?

c. Or do you want to perform an in-place restore? You have three options for doing so:

     i. Over-write the existing live data

     ii. Only restore new files – existing files will not be over-written

     iii. Add the restored files to the existing files

d. When you have completed the confirmation form, click OK.

Please confirm the restore request ✕

You are about to restore items from the archive of **ca4software-my.sharepoint.com/personal/bob_smith_ca4software_onmicrosoft_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 |

---

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."

4.3.1.2   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 |
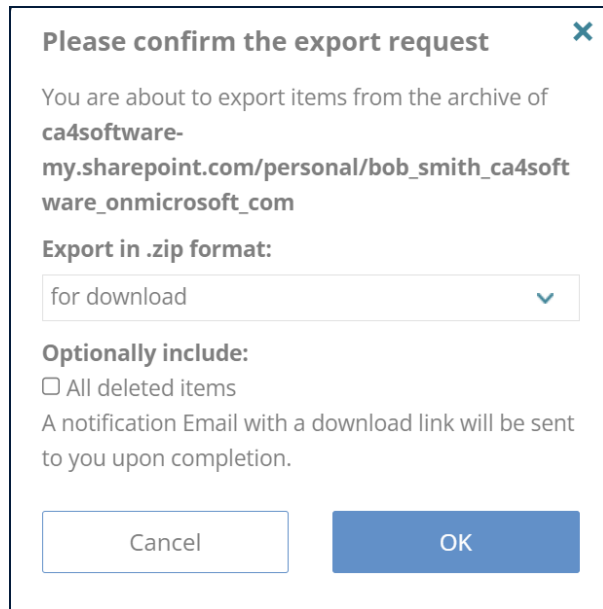
2. Click the drop-down list and select one of the following storage locations:

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

CLOUDALLY

an **opentext** company
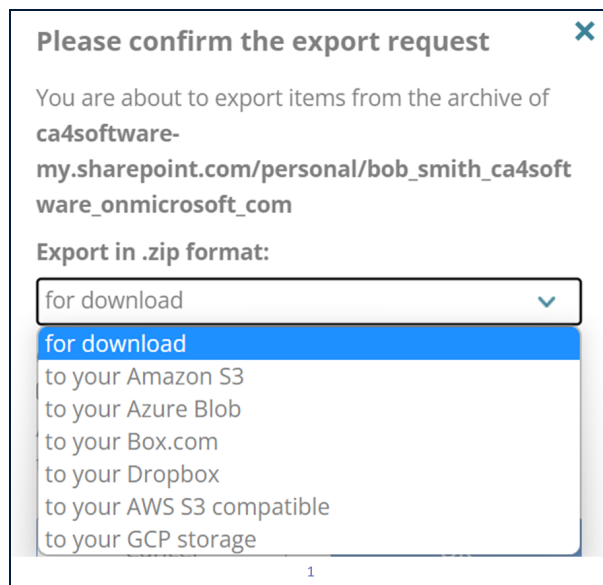
3. If you select options other than "for download," you may be asked for additional credentials and/or access tokens for the selected storage locations.

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.
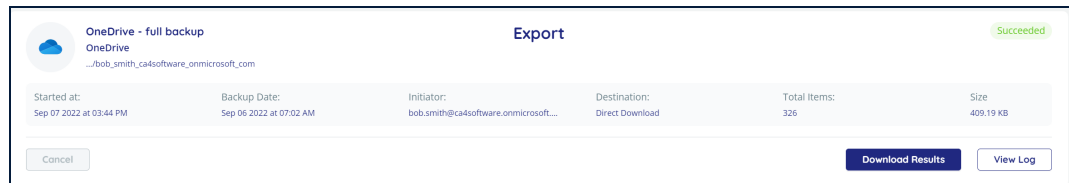
6. Click **Download Results**, and a page will open, where you can access your backup file.
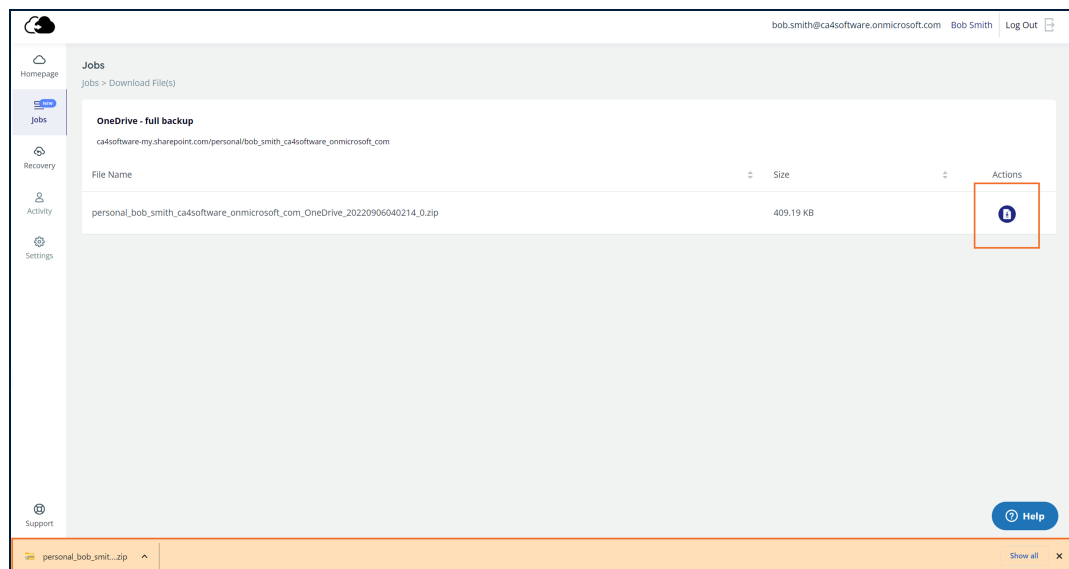
4.3.2   Restore or Download Via Item Search - OneDrive or SharePoint

1. Select **Via Item Search**, and enter a word or phrase to search on.

2. Or, click the arrow ⌄ to the right of the search bar, and enter search criterion in any of the Advanced fields: Author, filename or date.
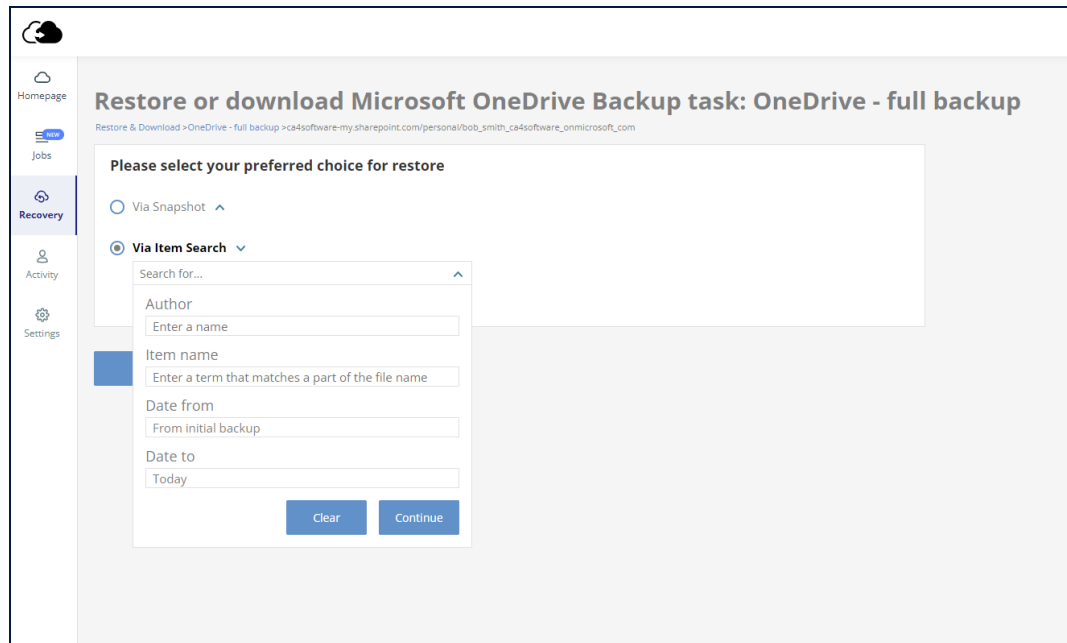
3. Click **Continue**. The *Restore or download* page is displayed, showing the search results with details such as **Date**, **Subject**, and **Folder Type, Name and Date**. The details columns are different for different types of restored items.

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   Using the Recovery Menu: Microsoft 365 Teams & Groups

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

To recover your backed up data:

1. Click **Recovery** from the Navigation Panel. The *Restore & Download* page is displayed with all your active-backup account details.
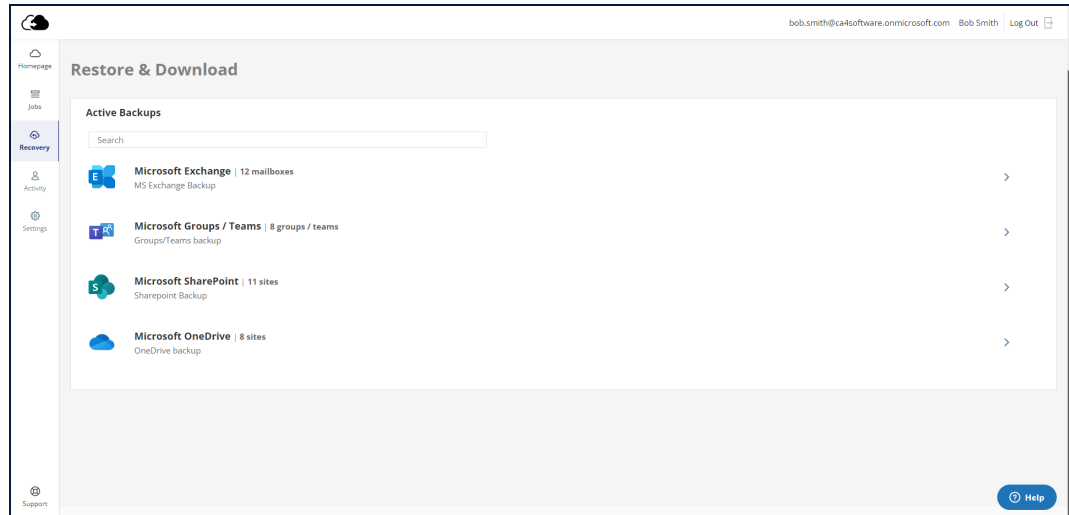
2. Click the Teams / Groups backup task from which you wish to recover the data. The *Restore or Download Microsoft 365 Active Mailboxes* page is displayed.
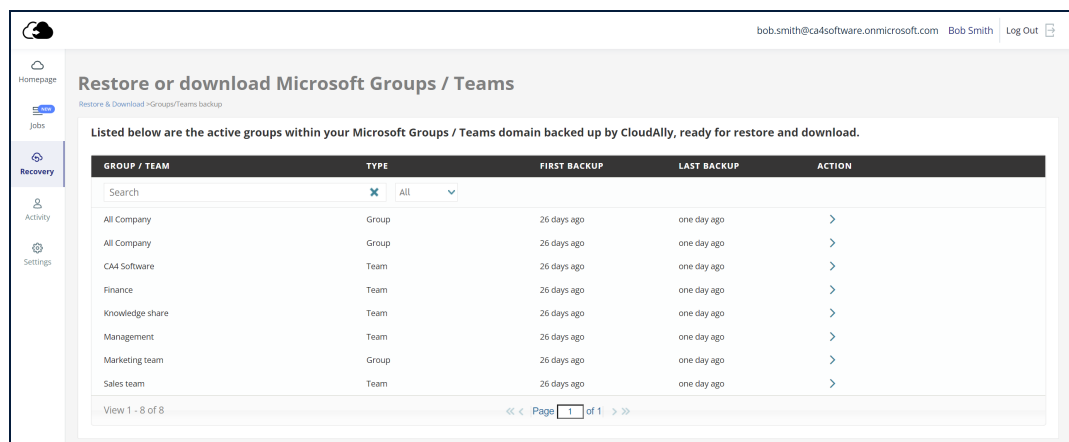
This page displays all your Teams & Groups backed up with the details such as Team/Group name, First Backup date, Last Backup date, and available Actions. Your backed-up data is ready for download, from this page.

■ You can filter the list using the following options:

  • Filter by statuses such as All, Active, In Process, Not Active, Scheduled, Paused, Backed-up in another task, or Archived, from the drop-down list.

  • Or: search by part or all of the Team/Group name.

■ Click the ⟩ icon at the end of the line of the account, team or site which you want to restore or export (download).

The *Restore or download Groups/Teams* page is displayed.
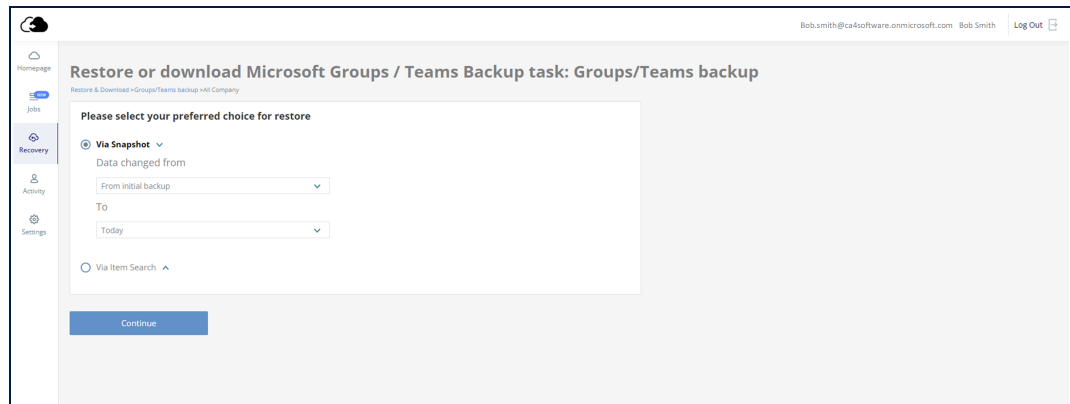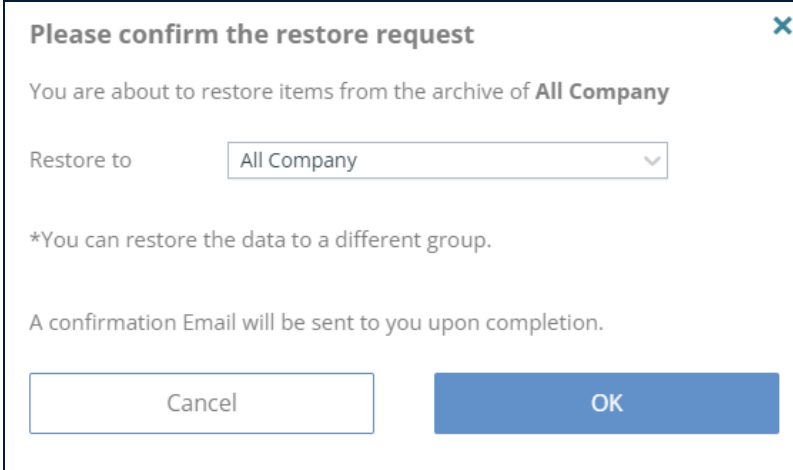
■ Select the radio button for your preferred restore method:

  • Via Snapshot

  • Via Item Search

4.4.1   Restore or Download Via Snapshot

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

4.4.1.1   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**.

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."

4.4.1.2   Export/Download - Teams & Groups

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

4.4.2   Restore or Download Via Item Search - Teams & Groups

1. Select one of the following options:
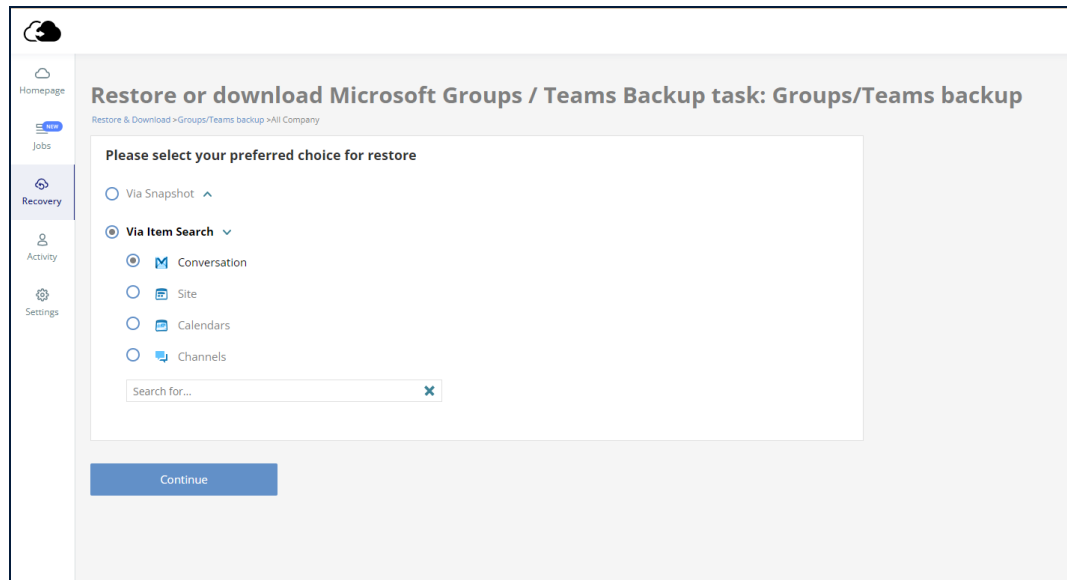
- ■ **Conversation**: Enter a keyword in the Search for field.

- ■ **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.

4.5 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**.

4.5.1 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.
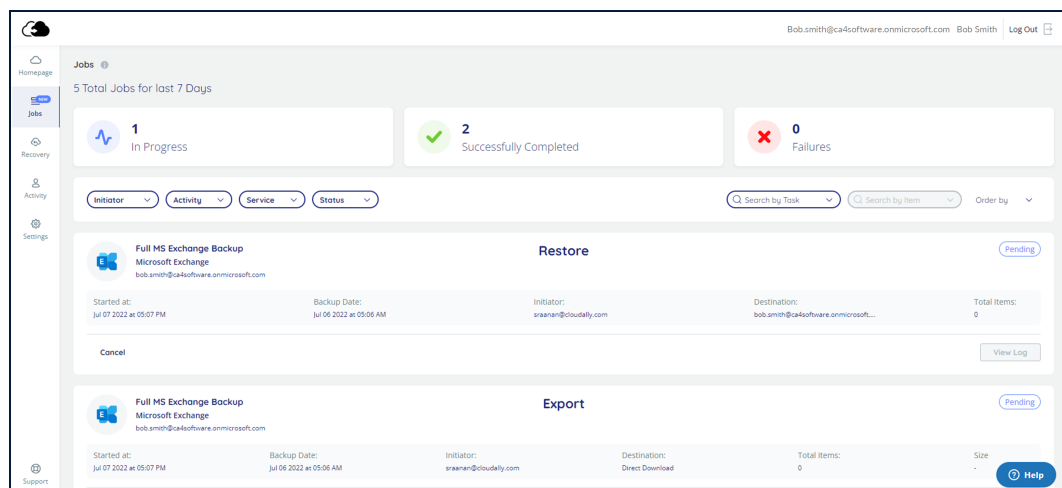
To see a list of jobs that have any of these 3 statuses, click on the status, and your results will be filtered accordingly

4.5.2   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:

  - Microsoft Exchange

  - Teams/Groups

  - One Drive

  - SharePoint

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

- ■ Latest First
- ■ Oldest First

4.5.3   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.

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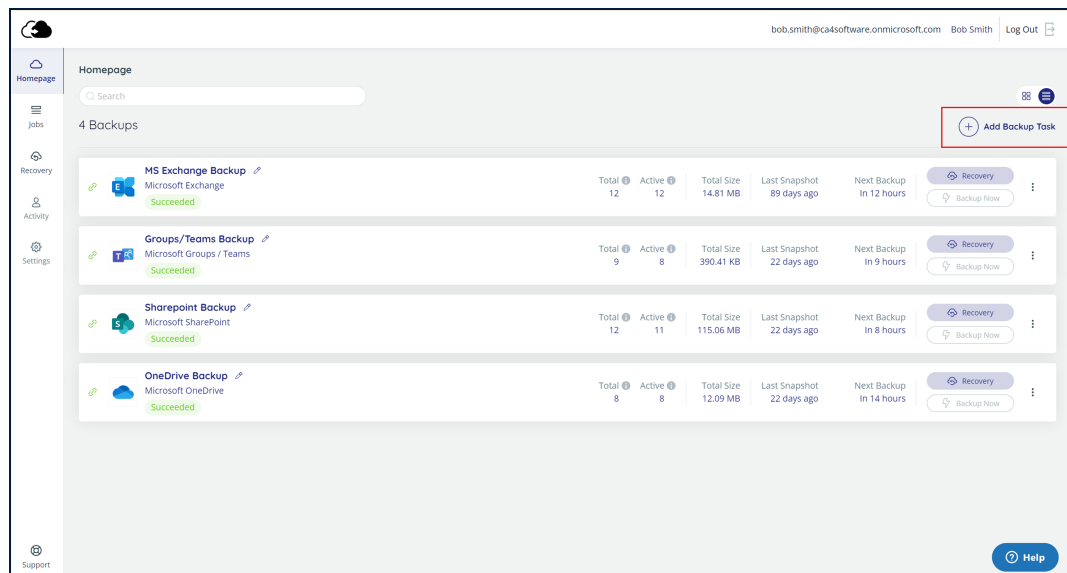
2. Click the Microsoft 365 icon from the list or enter a keyword in the Search field to find a specific task. The *Microsoft 365 Backup* page is displayed.

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

5.1.1   Filtering Using Names or Statuses

You can filter accounts using the following options:

- Enter a search phrase in the *Search by* field to view all the accounts, teams or sites with the entered keyword.

- Filter by statuses such as Not Active, Scheduled, Success, In Process, Failed, Paused, Archived, or Partial.

5.1.2   Filtering Using Tags

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

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

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

1. Select at least one account, team or site.
2. Click **Tags**, and the following screen appears.
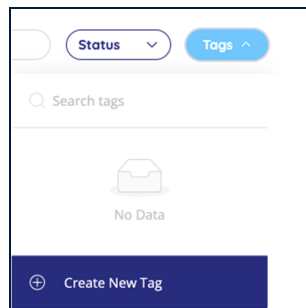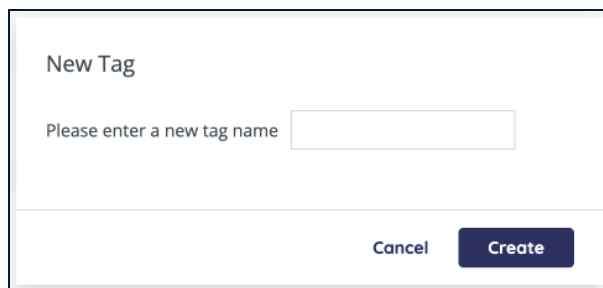
3. To search your existing tags, enter a tag name in the **Search tags** field.

5.1.3   Creating a New Tag

To create a new tag:

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

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

To apply tags to your account, team or sites:

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

5.1.4 Filtering by Tag

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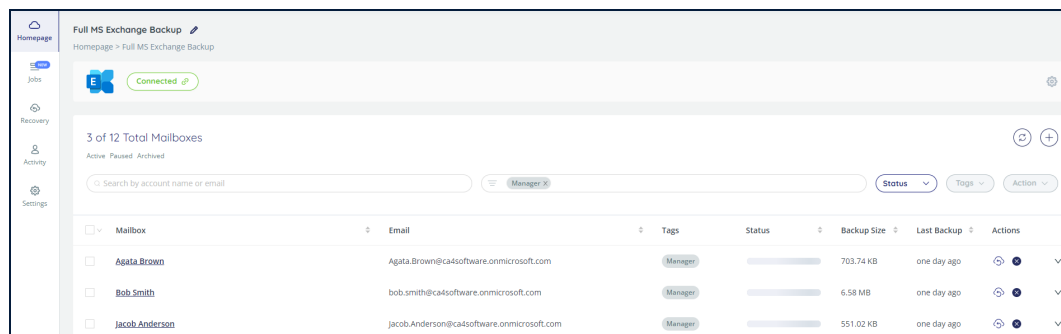
5.1.5 Actions

To perform actions on a account, team or site, select at least one of them on the list, and the **Action** button will be enabled. Click **Action** to see the following drop-down menu:
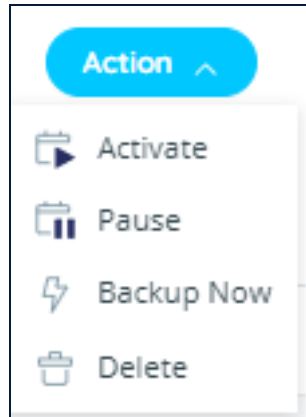
- ■   **Activate** enables backup in all the selected account, team or sites.

- ■   **Pause** halts the backup procedures on the selected account, team or sites.

- ■   **Backup now** starts the backup immediately. The backup in this case starts as soon as a backup processing machine is available, which may take several minutes.

- ■   **Delete** removes the backup task and backup data for the selected account, team or sites.

5.2   Viewing Backup Statistics with the Drill-down Feature

Select an account, team or site, and click the ⌄ button on the right-hand side of the row. This option enables you to drill down to the backup history dashboard.
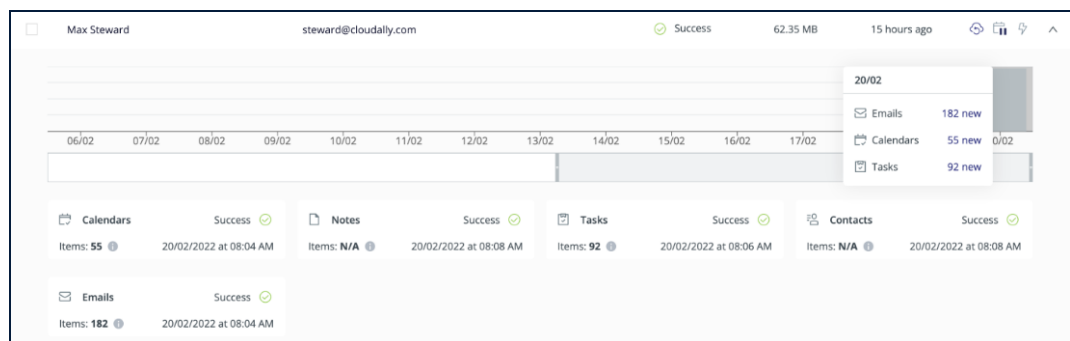
When you drill down, you can find a diagram describing past backups, and a brief summary of the backup outcomes.

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.
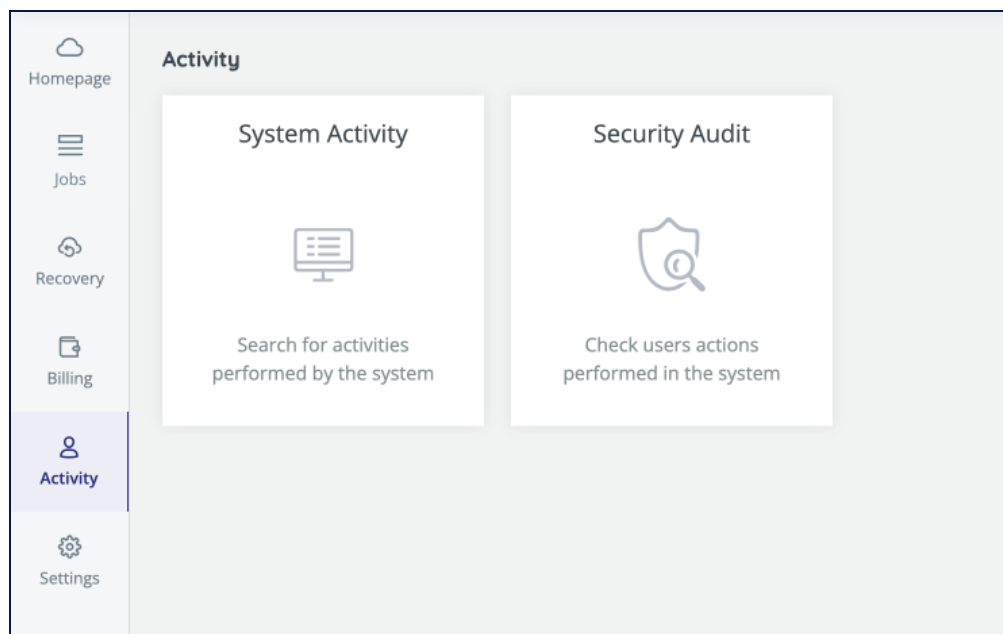
6.1.1   System Activity

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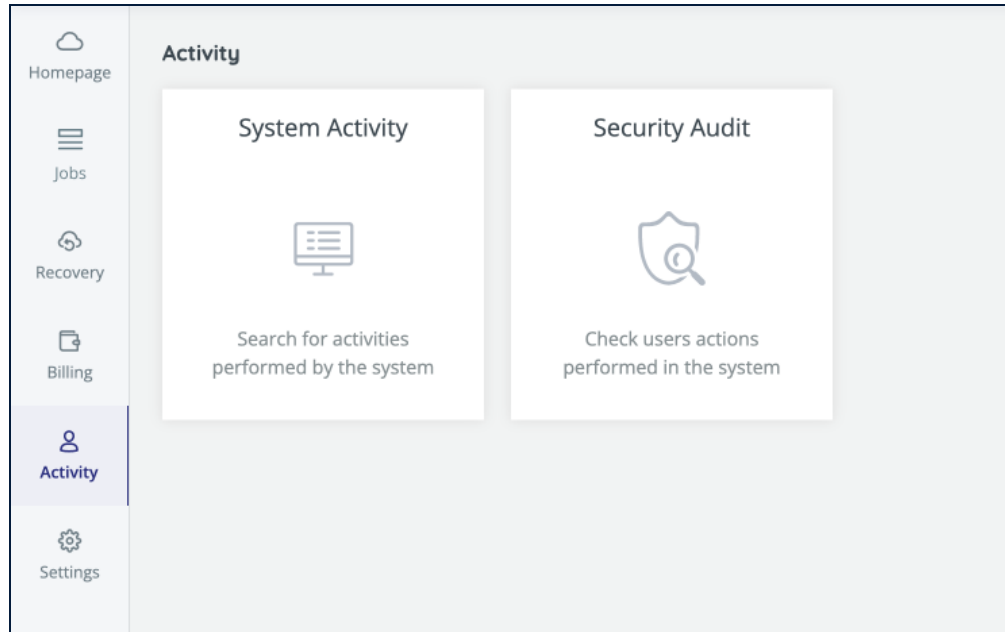
The *System Activity* page displays your account activity, with details such as Activity, Date and Time, Service, Sub-Service, Status, Task Name, and Item.

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 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:
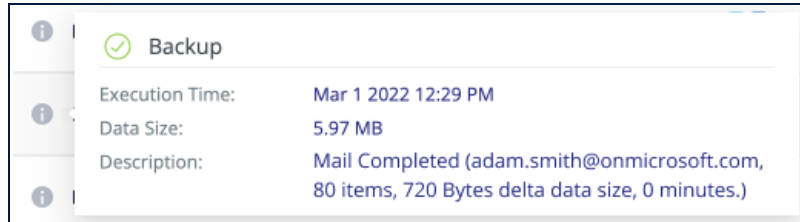
6.1.2   Security Audit

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

6.2 Managing Your Account Settings

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

- Account
- User Management
- Security
- Notifications

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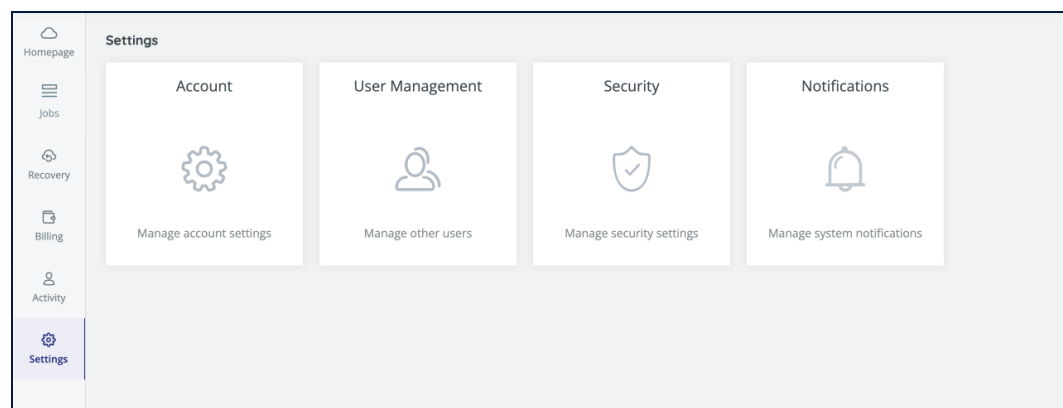
6.2.1 Account Settings

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

To update or change your account details:

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

1. You can update the Account Name and/or Email.

2. Click **SAVE**.

6.2.2   Canceling Your CloudAlly Subscription

To cancel your subscription:

1. Select the check adjacent to the "I approve the removal of my data from
    CloudAlly" field and click **REMOVE ACCOUNT**.

2. The *Are you sure?* pop-up window is displayed with a confirmation request.

3. Click **YES** to confirm the cancellation.

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

6.3   User Management

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

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.

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

6.4 Security Settings

The *Security Settings* page enables you to:

■ Update your password

■ Set up two-factor authentication

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

- 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.

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.

Settings

Settings >> Security >> Two-Factor Authentication

1. Download the Google Authenticator app.

(for Android, IOS and Blackberry)

2. Open Google Authenticator and add your CloudAlly account by scanning the QR code to the right. If you cant use a QR code then enter this text code: VOLLIK2IWTQ6QMPM

NEXT
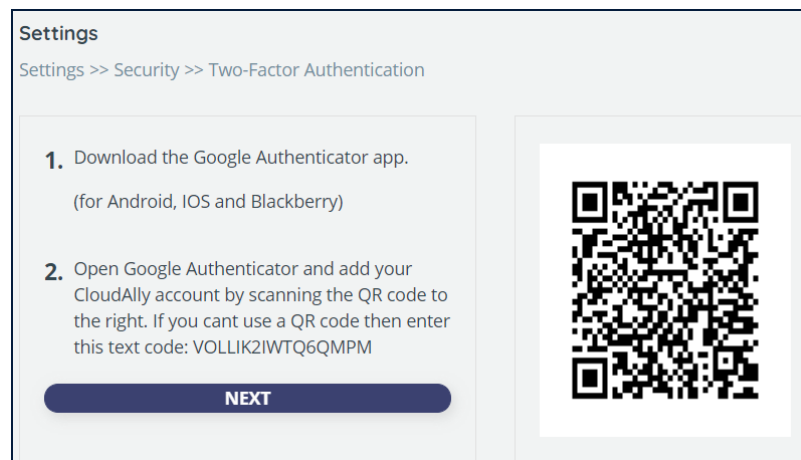
7. Download an Authenticator app, depending on your platform.

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 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.

 To set up Okta:

1. On the **Settings** > **Security** > **SAML** tab, add the URL to the SAML Identity Provider Metadata file.

2. Or, you can upload the file itself.

3. Click **Activate**.
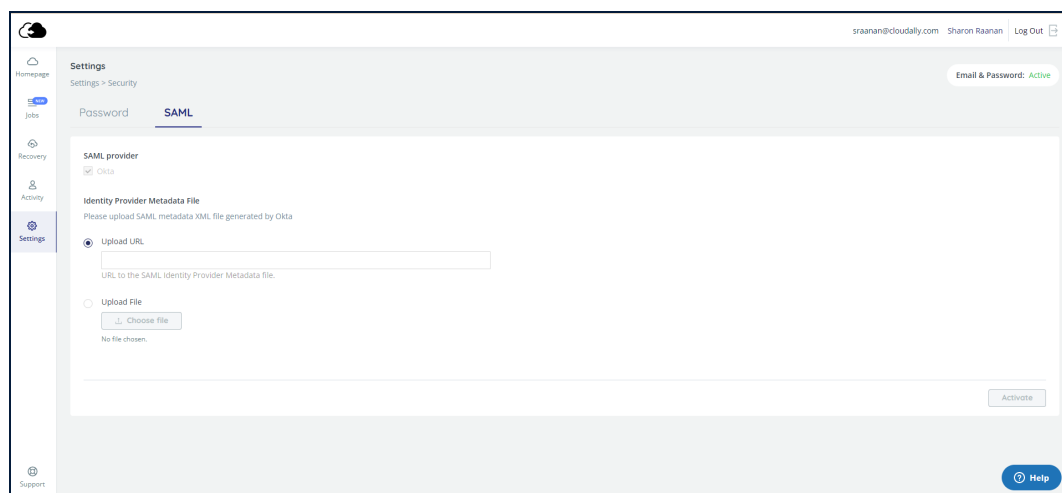
For further instructions, see the [CloudAlly Okta User Guide](#).

6.4.4   IP Restrictions

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

Setting Up IP Restrictions

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

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

1. In the *Settings* panel, click **Security**, and then **IP Restrictions**.
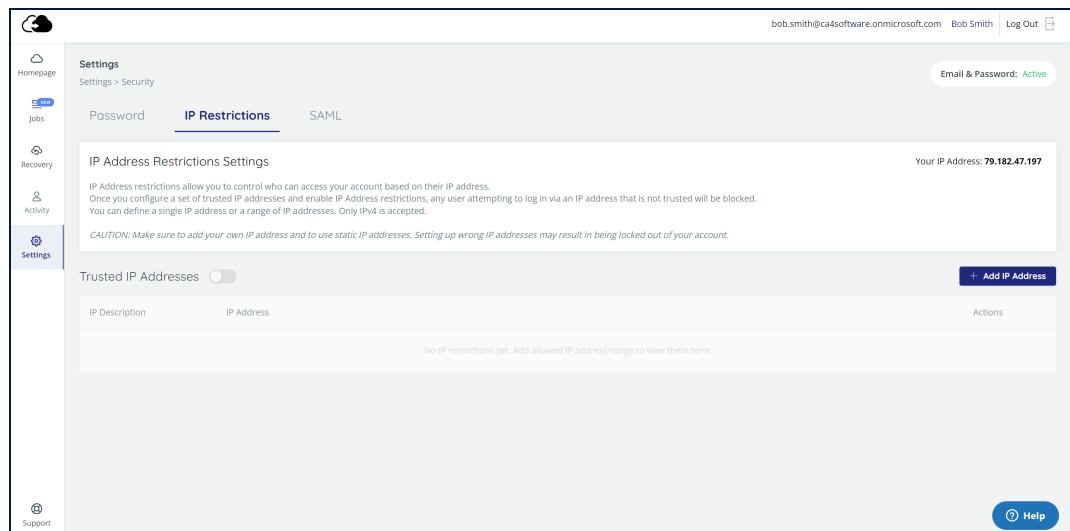
2. Click **+ Add IP Address.**

3. Enter one or more IP addresses:

    a. Enter individual addresses separated by commas, and an optional description.

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.

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.
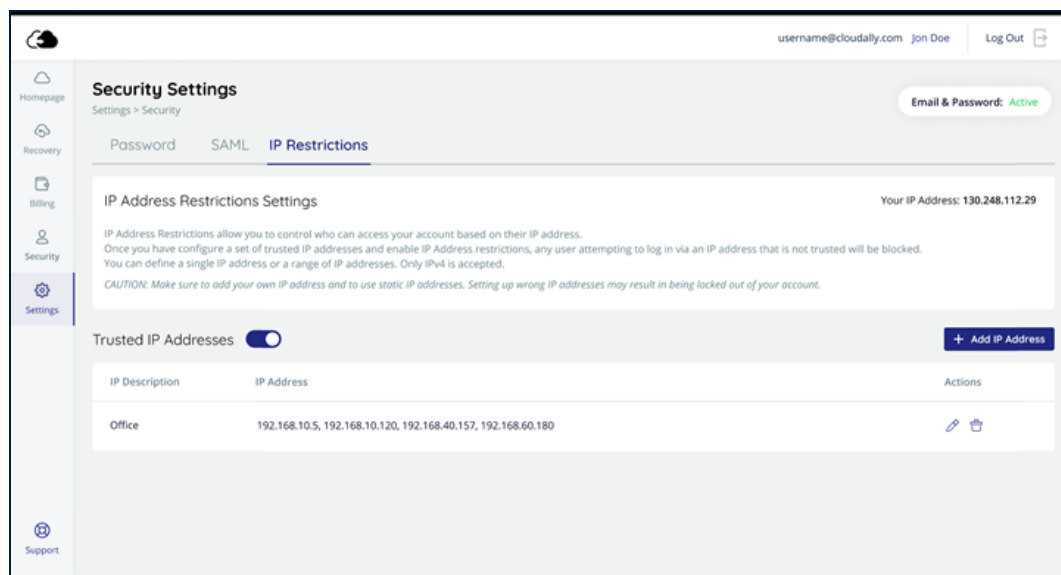
You can edit your list of addresses by clicking ✏, or delete ones that you no longer want on your trusted list by clicking 🗑.

> **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:
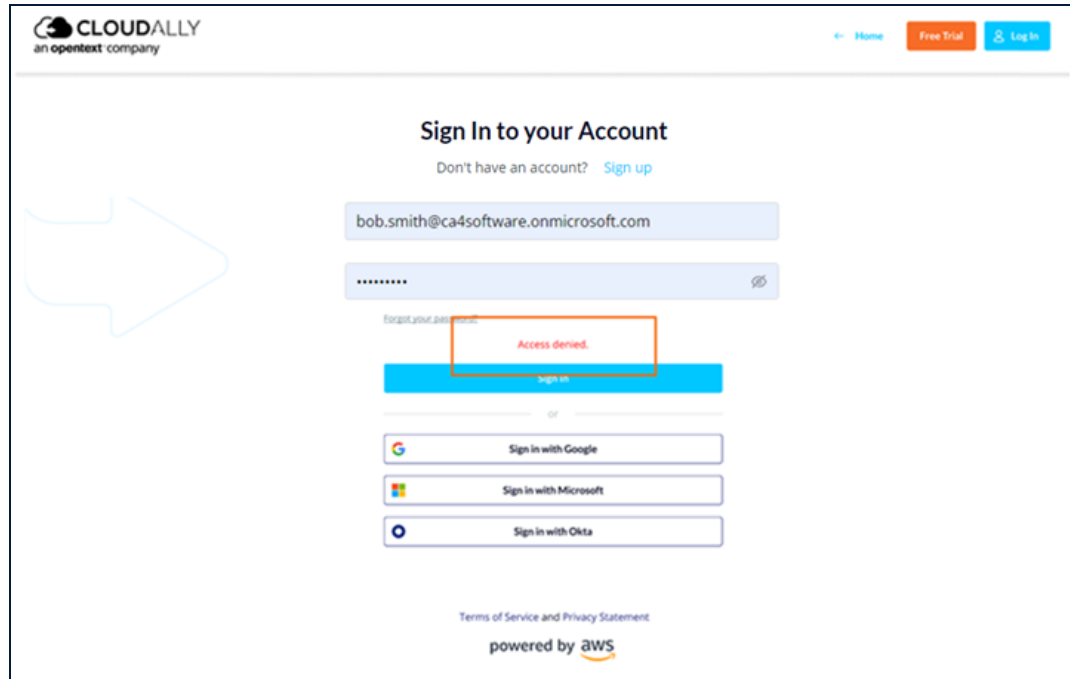
6.4.5   Email Notifications

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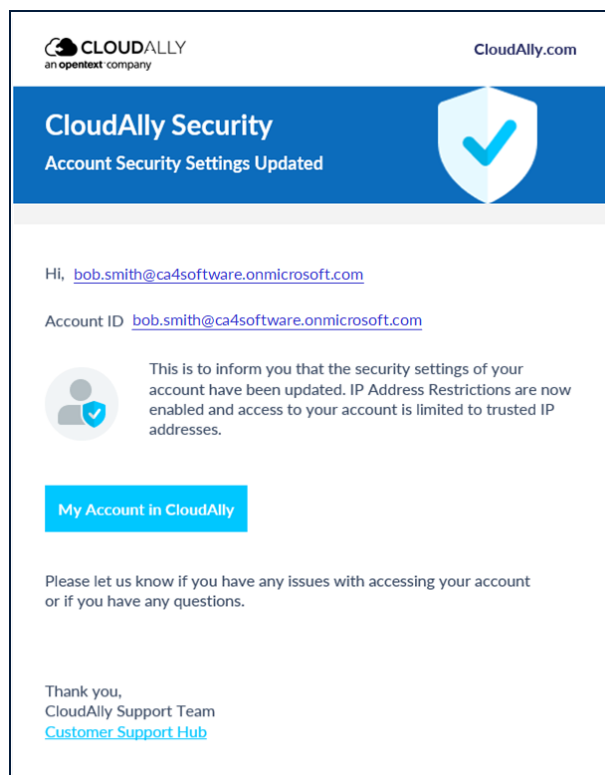
6.5   Notifications Settings

This menu option enables you to manage your system notifications.

From the Navigation Panel, click **Settings** > **Notifications**.
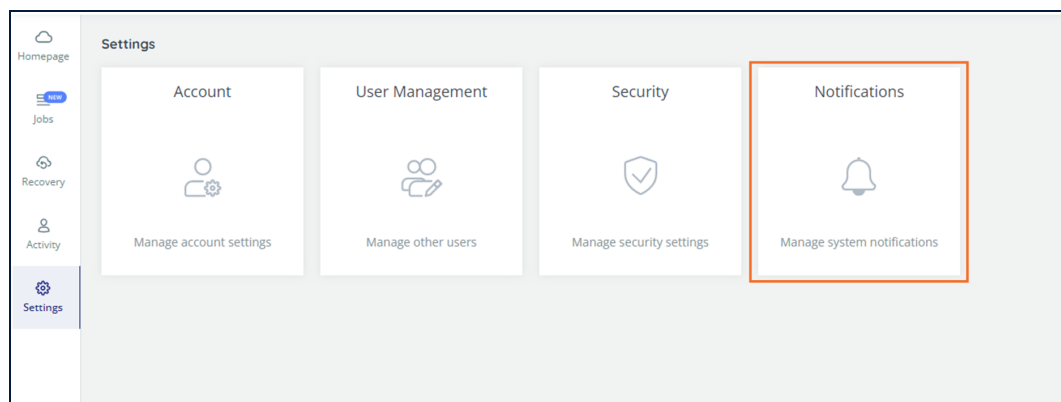
The following screen will appear:
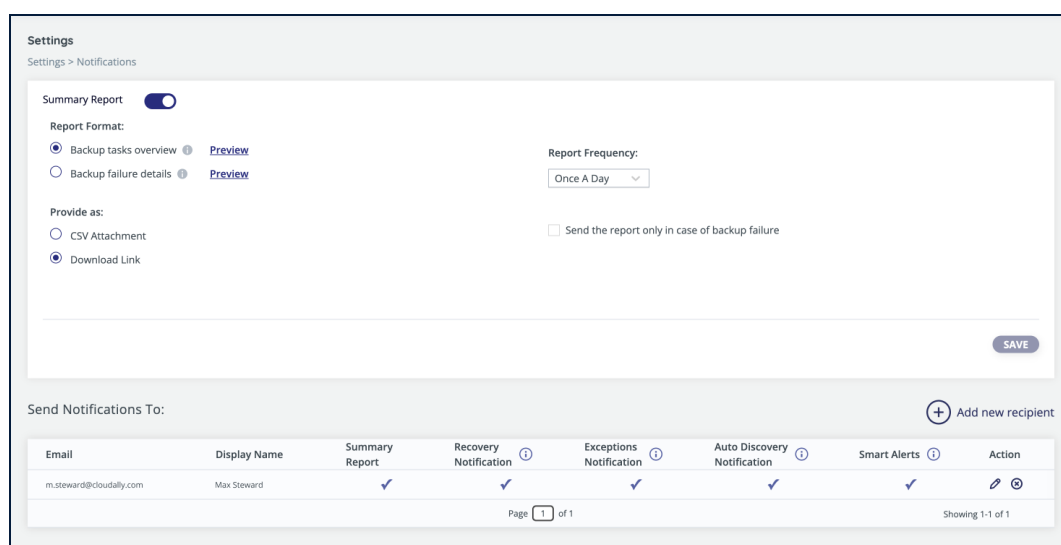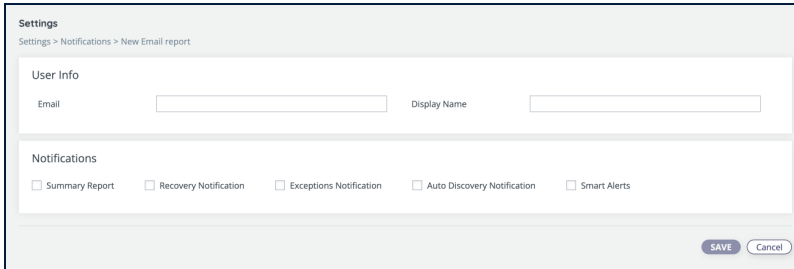
The top of the screen enables you to configure the following options:

- 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 > New Email report

User Info

Email   Display Name

Notifications

☐ Summary Report   ☐ Recovery Notification   ☐ Exceptions Notification   ☐ Auto Discovery Notification   ☐ Smart Alerts

SAVE   Cancel

6.5.1
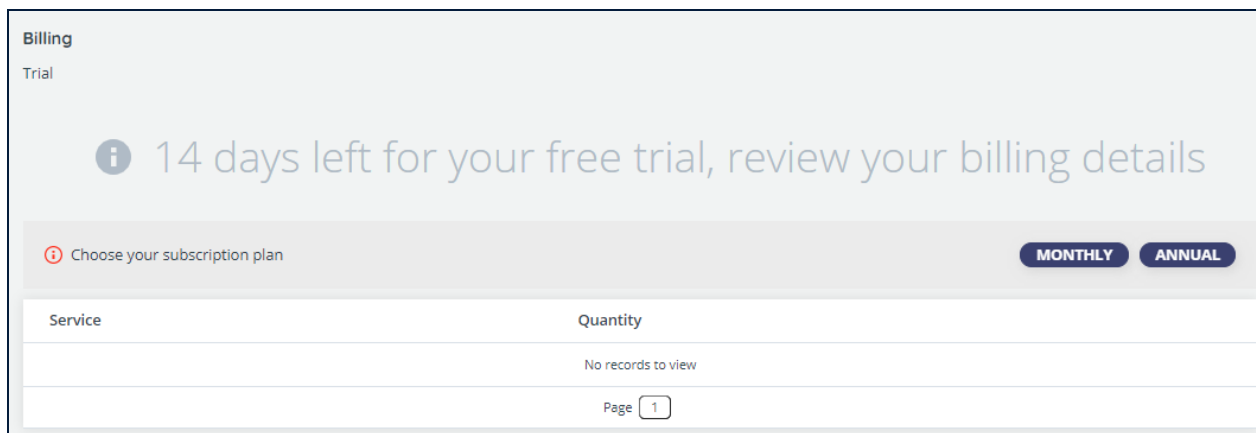
7   Managing Subscriptions and Payments

7.1   Subscribing to CloudAlly

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

To subscribe to a plan:

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

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

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

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

You are redirected to the *Payment Details* page. Fill in the billing and credit card details to finish the subscription process. Refer to 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. After you are charged each month, a receipt will be emailed to you.

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

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

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

7.1.2   Annual Subscriptions

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

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

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

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

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

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

7.2   Payment Details
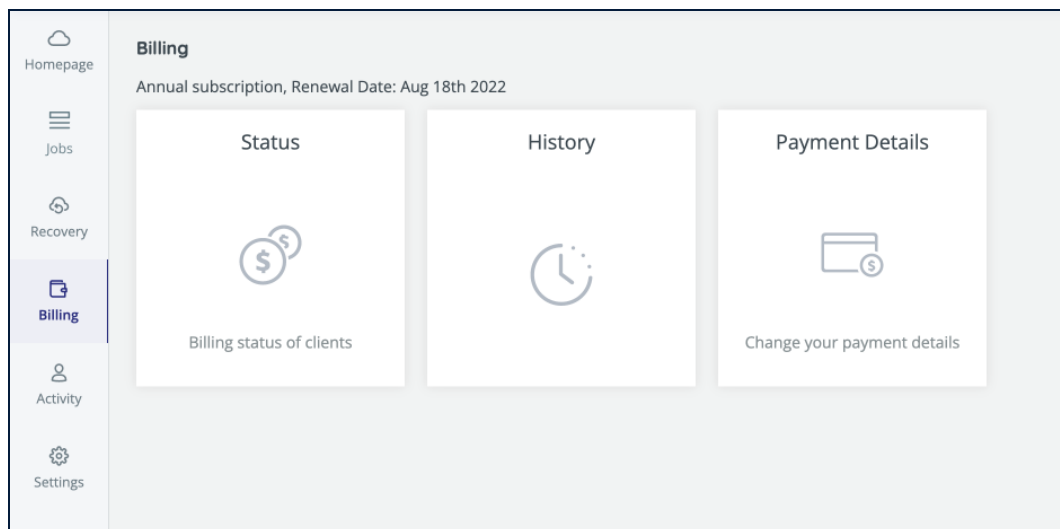
The *Payment Details* page contains the information used for billing.

7.2.1   Monthly Subscriptions

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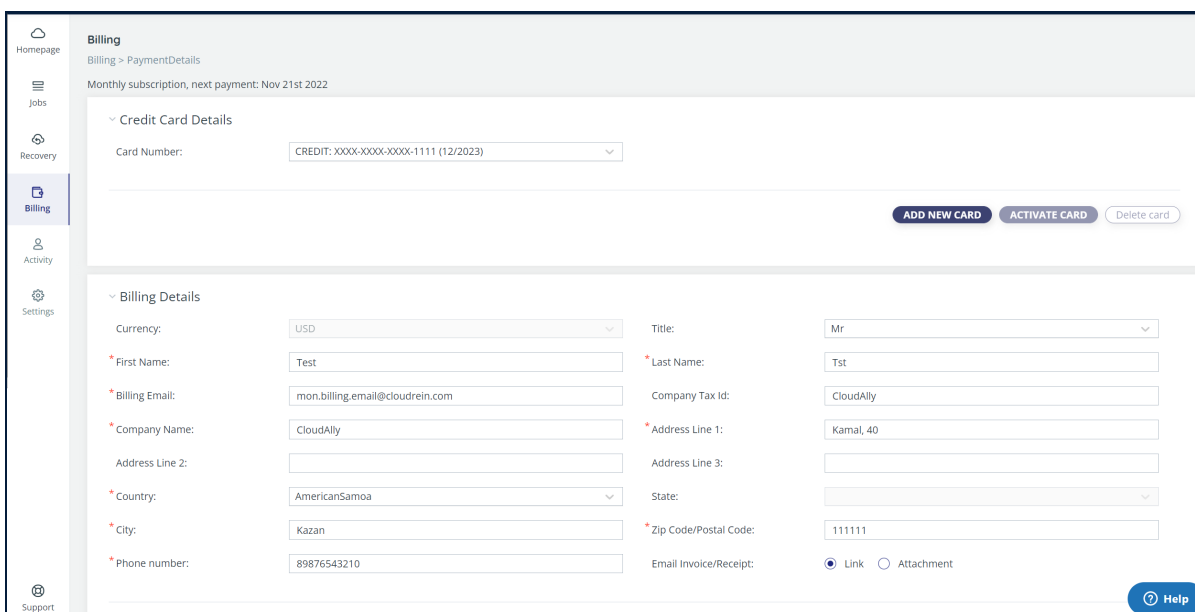
7.2.1.1   Add New Card

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

To create a new payment method:
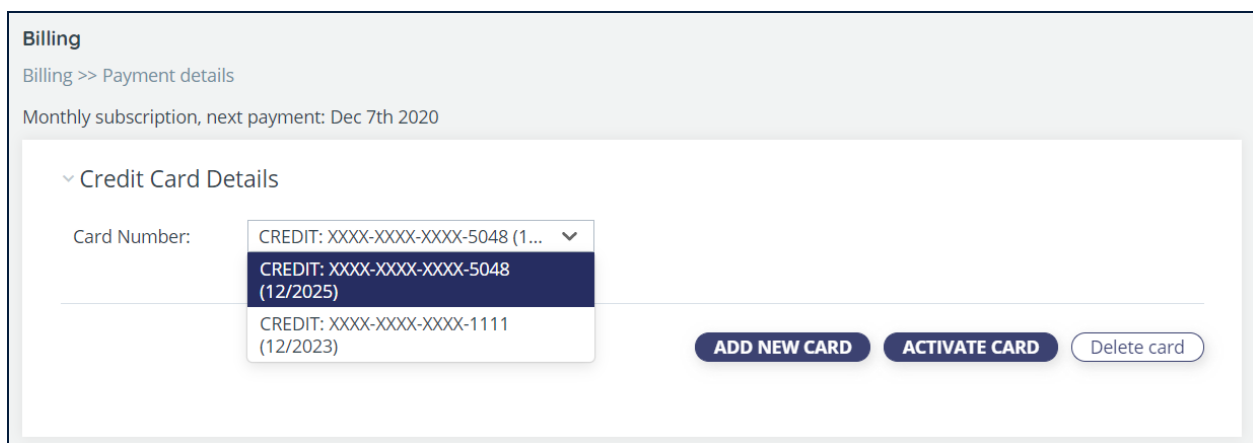
1. Click **ADD NEW CARD.**
2. Enter the card details such as Card Number, CVV, Card holder's name, and card expiry date.
3. Click **ADD NEW CARD**.

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

7.2.1.2   Change Payment Method

To change your existing payment method:

1. Click the drop-down list and select the payment method from the Cards Number drop-down list.

2. Click the payment method from the list (the screen shot below depicts choosing a different credit card).

3. Click **ACTIVATE CARD** to set the selected card as the preferred payment method.

Billing

Billing >> Payment details

Monthly subscription, next payment: Dec 7th 2020

⌄ Credit Card Details

Card Number:	CREDIT: XXXX-XXXX-XXXX-5048 (1... ⌄		
	CREDIT: XXXX-XXXX-XXXX-5048 (12/2025)		
	CREDIT: XXXX-XXXX-XXXX-1111 (12/2023)	**ADD NEW CARD** **ACTIVATE CARD** Delete card

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

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

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

5. Update the required fields. The fields marked with the * symbol are mandatory.

6. Click **UPDATE BILLING DETAILS**.

7. The updates are saved.

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

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

7.2.2   Annual Subscriptions

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

7.3   Billing Status

Annual Subscription

When you have paid your annual subscription, this page displays the next payment forecast for the upcoming payment date. The details include Service type and backup name, Quantity, Unit Price, and the Total Amount.
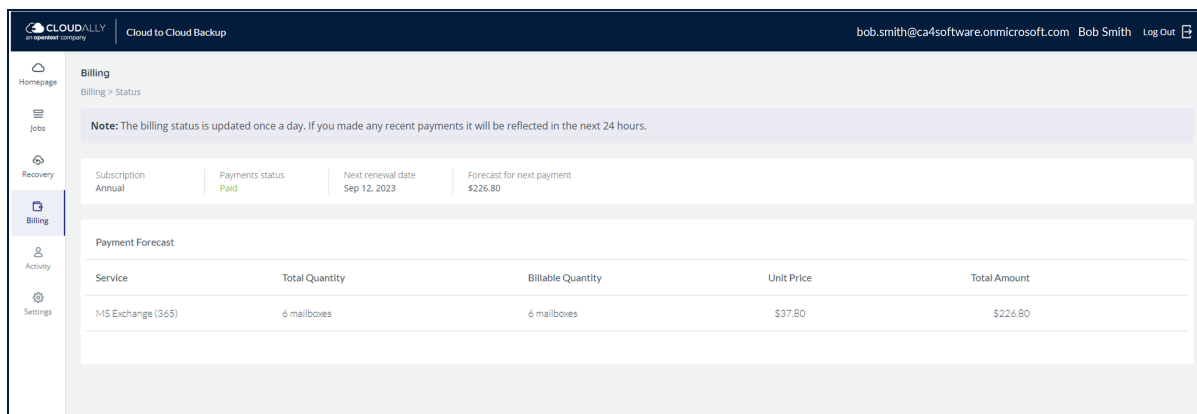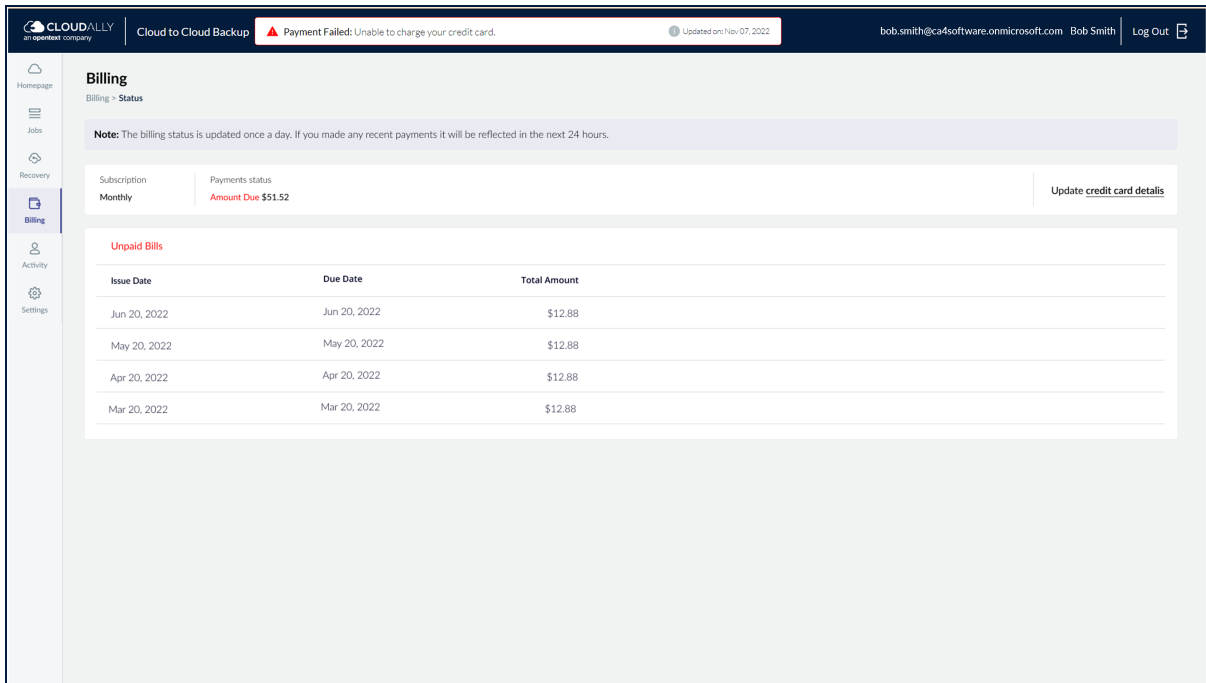
If you have neglected to pay your annual subscription, the status will look like this:
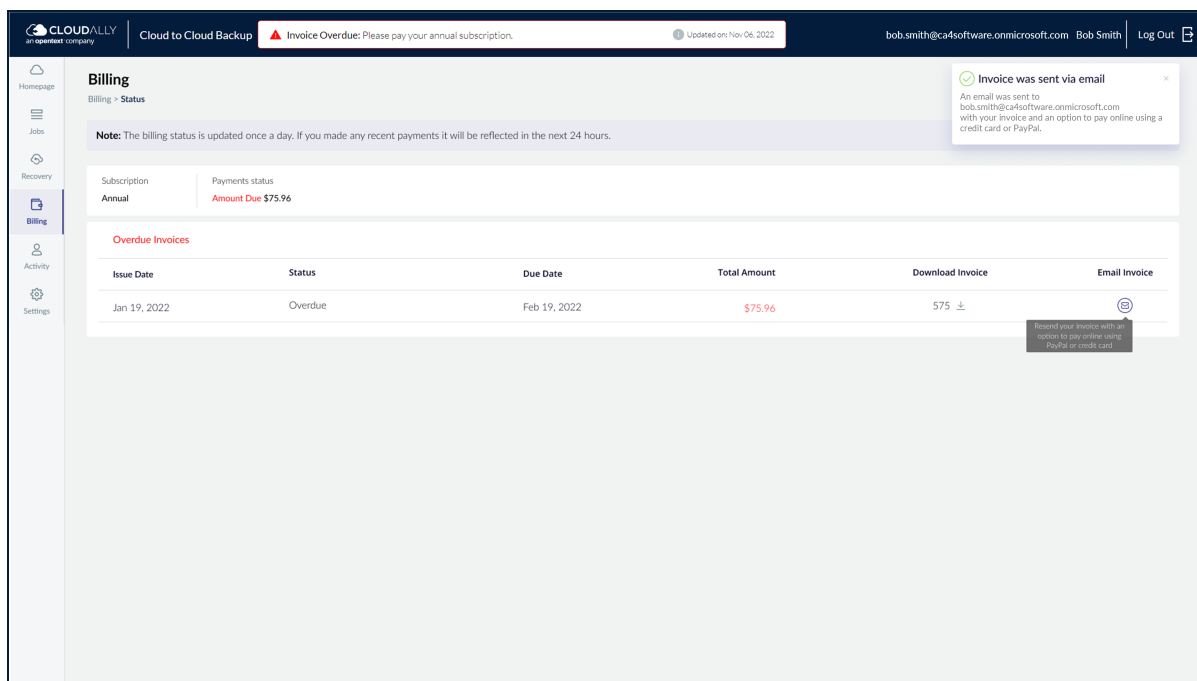
You can click ⬇ to download the invoice, or you can click ⊜ to receive an email version of your invoice, with the option to pay online either by PayPal or credit card.

Monthly

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

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

7.4   History

This page displays the history of payments.

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	$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.

CLOUDALLY

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

Certified Copy

26 Apr 2021

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 ✎ to the right of the user's name. For a new user, the notification options will appear when you define the new user's details.

3. Click "View billing notification messages" on or off.
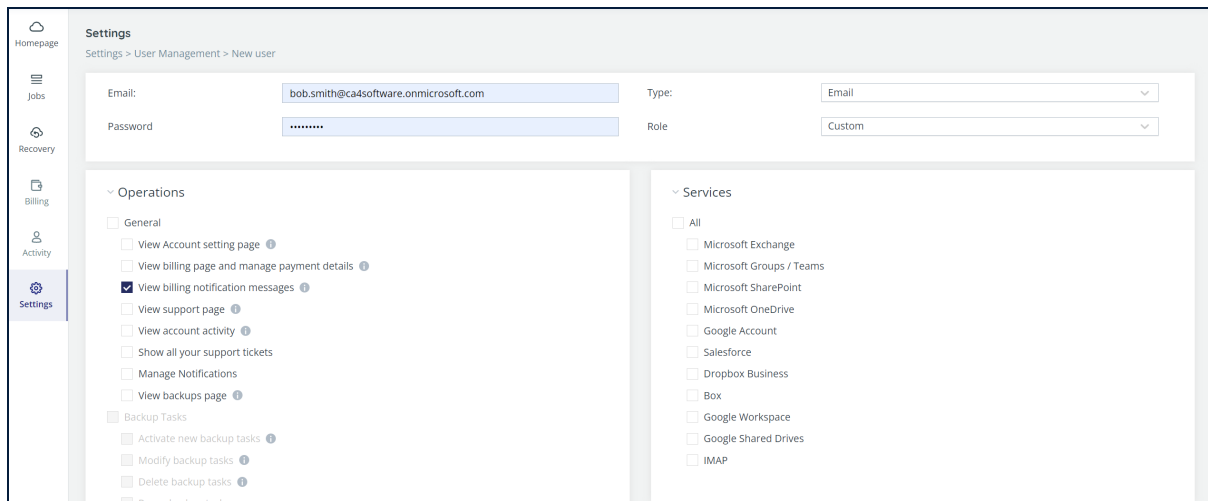
8   Helpful Resources

8.1   About CloudAlly

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

8.2   Knowledge Base

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

8.3   Support

Support - If you have any question or need further help, do not hesitate to contact us via email at 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.
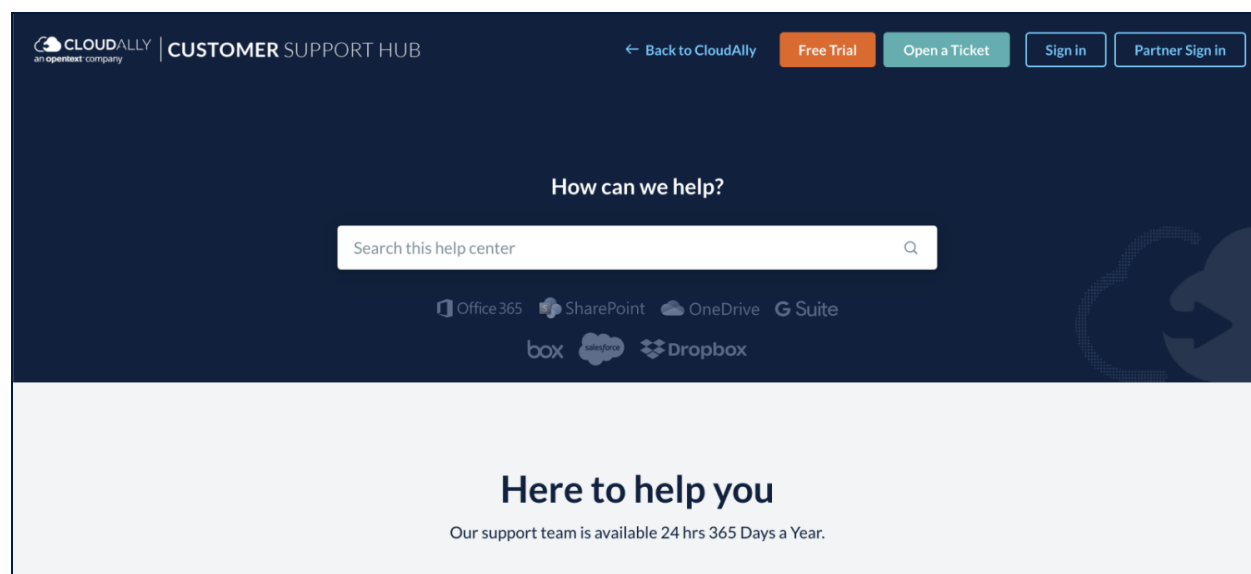
CloudAlly provides multi-channel support options:

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	Call	Chat	Email
Open a new ticket or view your existing tickets	Our agents are available to assist by telephone.	Click to chat with our customer support agents.	Email us with your customer support inquiry.
Open a Ticket	Call Us	Chat With Us	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	Copyright & Legal

10   Glossary

M

My Term

My definition

CLOUDALLY

an **opentext** company

Visit our Customer Support Hub

11   Index

U