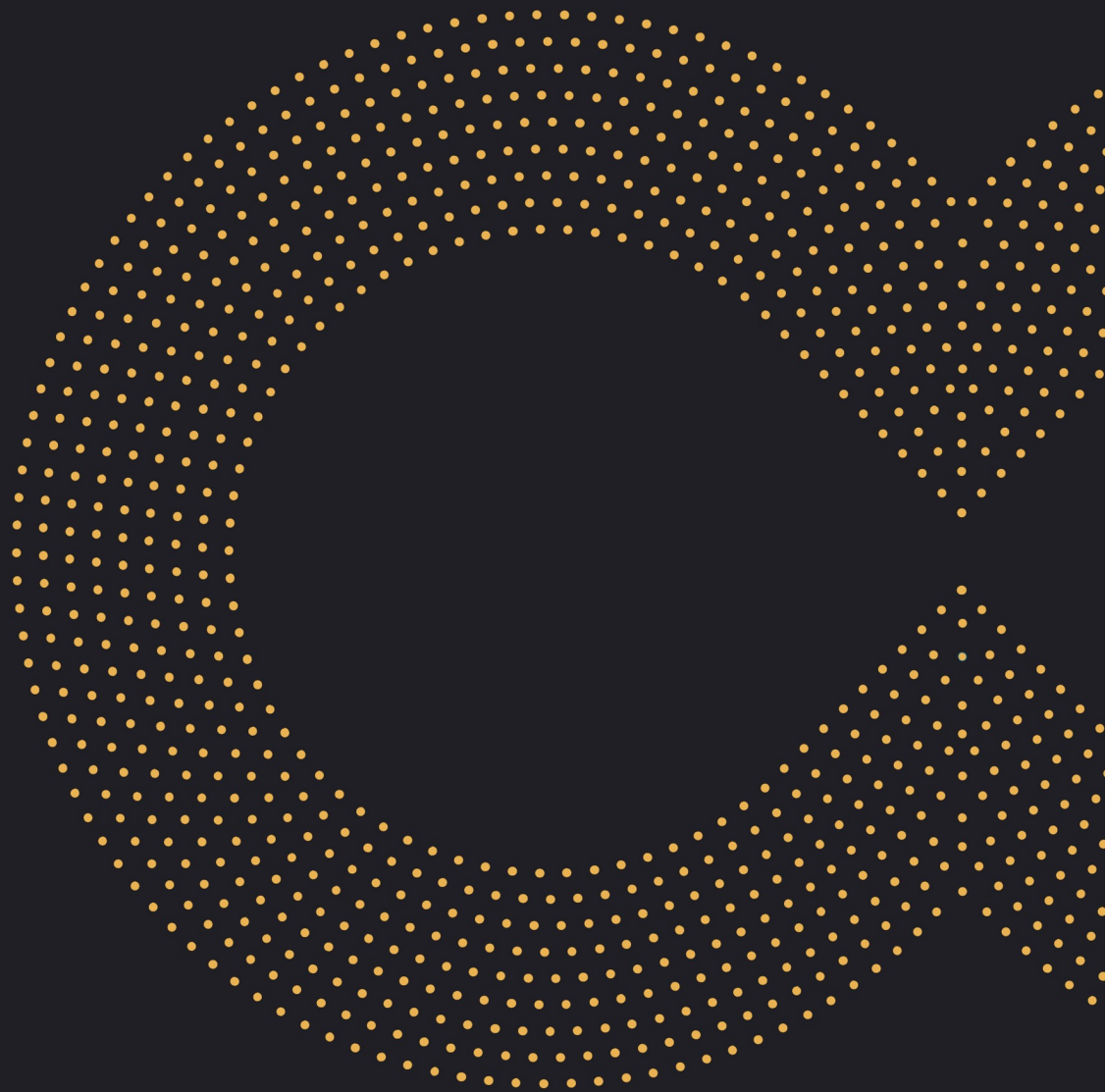


∞drive save

Administrator Guide

Backup Management



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1. Getting started configuring your workspace

As an Oodrive account holder with administrative rights, you have been made administrator of one or more administration modules on your company's workspace.

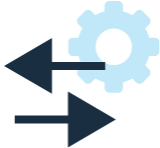




As a result, you are responsible for configuring a certain number of options relating to the behavior of applications offered to your organization's employees.

Several administration modules may be available to you in the Oodrive Suite portal, depending on how these responsibilities have been assigned within your company.

Some administration modules are shared between all Oodrive solutions and allow you to configure and monitor your workspace as a whole :

Shared administration modules	
Access Management 	<ul style="list-style-type: none"> Configuration of workspace access and authentication Access documentation
User Management 	<ul style="list-style-type: none"> Management of workspace users Access documentation
Custom Graphics Management 	<ul style="list-style-type: none"> Configuration of the workspace name, logos and colors Access documentation
Activity Tracking 	<ul style="list-style-type: none"> Activity tracking for all workspace users Access documentation
Administration of Legal Notices 	<ul style="list-style-type: none"> Management of legal notices and approval by workspace users Access documentation

Other administration modules are dedicated to a specific solution. These modules allow you to configure each application according to the needs of your organization :

Solution-specific administration modules	
Sharing Administration 	<ul style="list-style-type: none"> • Module dedicated to Oodrive Work_share and Oodrive Work • Configuration of options for sharing and collaboration applications • Monitoring of user activities Access documentation
Work Administration 	<ul style="list-style-type: none"> • Module dedicated to Oodrive Work • Teamspace management Access documentation
Backup Management 	<ul style="list-style-type: none"> • Module dedicated to Oodrive Save • Configuration of savesets and backup policies for your user base Access documentation
Oodrive Media Administration 	<ul style="list-style-type: none"> • Module dedicated to Oodrive Media • Configuration of the Media Library application Access documentation
Oodrive Meet Administration 	<ul style="list-style-type: none"> • Module dedicated to Oodrive Meet • Configuration of meeting options Access documentation

An administrator guide is available for each of these modules in order to assist you in configuring your workspace, depending on your role.

Please note: Only Oodrive technical support can be responsible for assigning and modifying administration rights. As a result, the administration modules to which you have access depend on the configuration defined by Oodrive support and its main point of contact within your company.

1.1. Compatibility

Please visit the following web page on Oodrive Save software compatibility:

The Oodrive Save solution is compatible with the .NET Framework v4.5.2 and the TLS 1.2 protocol. TLS versions 1.0 and 1.1 are no longer supported.

Please also note that only versions 7.4 and later of the Oodrive Save PC client respond to actions performed in the Backup Management module.

1.2. Log in to your workspace

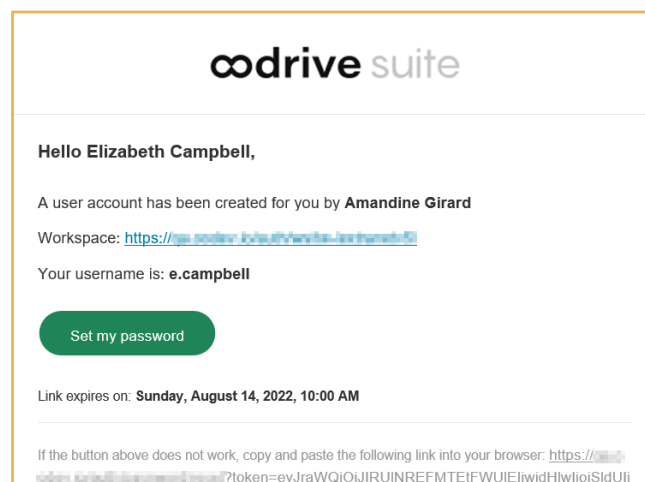
There are two ways to log in to your workspace:

- using your Oodrive login credentials
- using your company login credentials

The login options available on your workspace depend on your Access Management module settings.

Log in with your Oodrive login credentials

1. Retrieve the username emailed to you when your account was created and click **Set my password**.



2. You will be redirected to a browser page asking you to set a password and confirm it before clicking **Validate**.
3. Click **Log in** to access the login page.

Please note: If the Oodrive login field is not displayed, click **Log in using your login credentials** to access it.

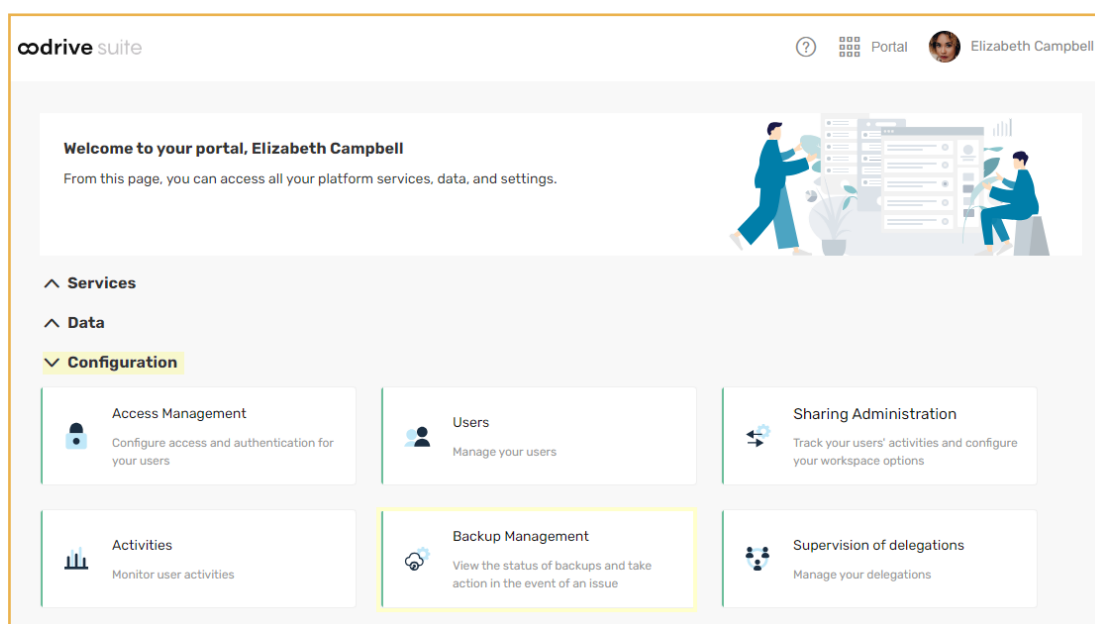
4. Enter your username and click **Next**.
5. Enter the password you have just specified, then click **Log in**.

Careful: After 5 failed login attempts, a security code will automatically be sent via email. This code will be required in addition to your password.

If you have forgotten your password, click **Forgot your password?**

If two-factor authentication has already been configured on your workspace, you will also be asked to enter the code received on your mobile device.

6. Next, you will access the Oodrive Suite portal, where you will find all the applications and configuration modules to which you have access.



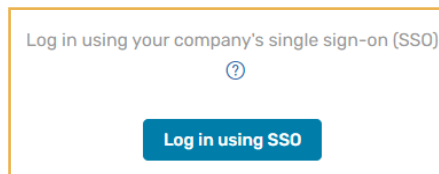
To return to the portal at any time, click on **Portal** in the upper-right corner of the page, then select **Portal**.

Please note: As a security measure, you will be automatically logged out of your session after 30 minutes of inactivity. You can extend your session by clicking **Continue to browse** when the logout warning appears on the screen.

Log out at any time by clicking on your name in the upper-right corner of the page, then on **Logout**.

Log in with your company login credentials

1. Click the **Log in using SSO** button.



If the button is not available, click **Log in using your company's single sign-on (SSO)**

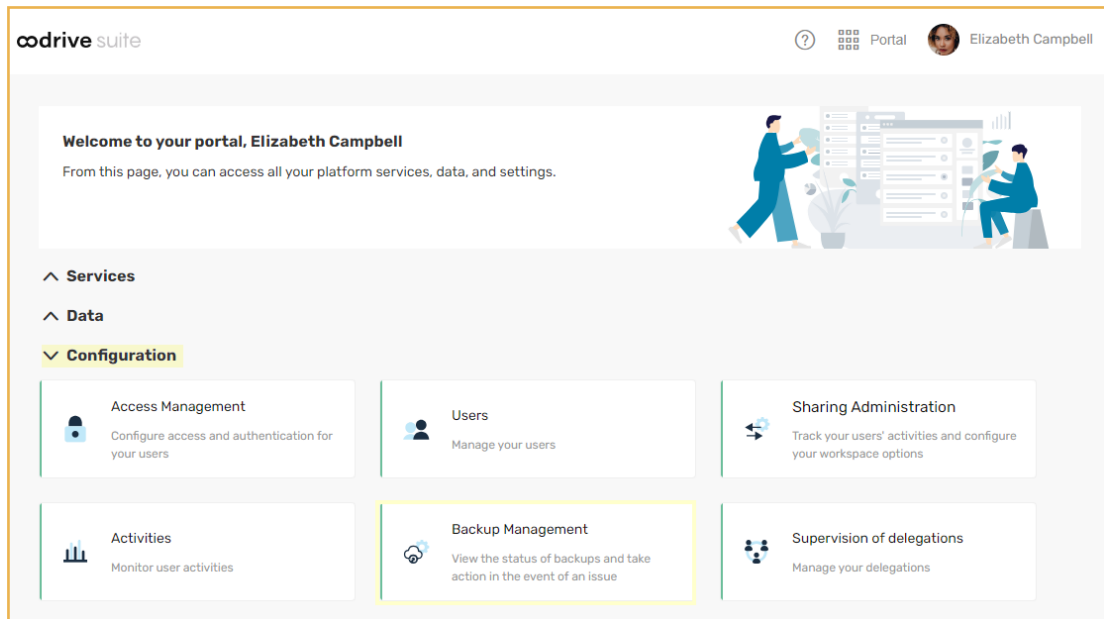
2. Enter your company login credentials and click **Log in**.

A screenshot of the Oodrive login interface. At the top, the "Oodrive" logo is displayed. Below it, the text "Sign in with your organizational account" is shown. There are two input fields: the first is for an email address, containing the placeholder "someone@example.com", and the second is for a password, labeled "Password". A blue "Sign in" button is located at the bottom of the form. The entire form is enclosed in a thin orange border.

If you have forgotten the password associated with your company username, please contact your company's IT administrator.

If two-factor authentication has already been configured on your workspace, you will also be asked to enter the code received on your mobile device.

3. Next, you will access the Oodrive Suite portal where you will find all the applications and configuration modules to which you have access.



To return to the portal at any time, click on  in the upper-right corner of the page, then select **Portal**.

Please note: As a security measure, you will be automatically logged out of your session after 30 minutes of inactivity. You can extend your session by clicking **Continue to browse** when the logout warning appears on the screen.

Log out at any time by clicking on your name in the upper-right corner of the page, then on **Logout**.

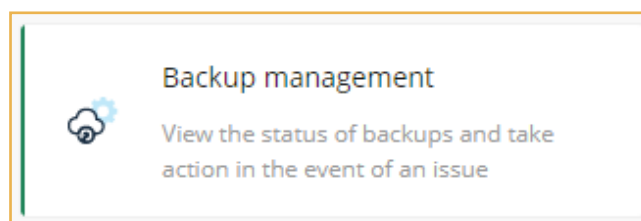
1.3. Overview of the Backup Management module

Please note: This Administrator guide focuses on configuring the Backup Management module. For a complete overview of the silent mass deployment process for Oodrive Save, please refer to the deployment documentation.

As a user with administrative rights, you are responsible for backup management in your company. This role involves the configuration of backup sets and policies for your user base, the management of security settings, and the supervision of backup and recovery actions.

Configuration	Management	Supervision
<ul style="list-style-type: none"> • Manage a user's backup sets • Create and assign backup policies • Launch the backup of an existing set 	<ul style="list-style-type: none"> • Enable, modify or disable restricted access • Edit the addresses configured for backup alerts 	<ul style="list-style-type: none"> • View backup statistics for your user base over the last 24 hours • Search for users and view their backup sets • View the action history

Careful: Only versions 7.0 and later of Oodrive Save respond to actions performed in the Backup Management module. In order to benefit from the full range of features, we recommend that you update all desktop clients in your user base to the latest version of Oodrive Save.



1.4. Browse the Backup Management Module

Using the browser tabs along the top of the page, you can quickly access all sections of the Backup Management module.



1.5. Search for a user

In the search bar in the **Users** section, enter a user's last name, first name or email address, or the title of a backup policy. The results display the user(s) meeting the search criteria.

Filter users

Filter the list of users to check users with a specific status or schedule state.

There are two ways of filtering your list of users:

- From the module's dashboard, click on one of the four backup statuses.
- From the **Users** section, click **Filter** and fill in the search form.

Note: To remove the applied filters, click on the small white cross to the right of their description.

You can also modify the order in which your users are displayed. By default, the list is ordered alphabetically by last name. Click on the **Last name**, **Id**, **Policy**, **Version** or **Last backup date** column headings to sort the list according to these specific criteria.

2. Creating backup policies

Backup policies let you apply the same backup settings to a set of users. You can therefore manage all backups in your user base in a centralized way.

In order to avoid losing backup sets and user data, we recommend that you think through the associations between your users and backup policies before creating custom backup sets or policies, while keeping the following rules in mind:

- When a user who already has a backup history and settings is added to a backup policy, this data is irreversibly erased and replaced with data related to the new policy.
- When a user is removed from a backup policy, their account retains the settings related to their old policy and their backup history. However, this data will be permanently lost if the user is added to a new backup policy.

Note: To add users to a backup policy, the following conditions must be met:

- Users have an active account.
- Users have version 7.4.0 or later of the Oodrive Save PC client.
- Users are not yet associated with an existing backup policy.

2.1. Step 1: Create and configure the backup policy

1. Go to the **Backup policies** section.
2. Click **Create policy**.
3. In the **Backup policies** field, enter the name of your new backup policy.
4. Check the options you wish to activate:
 - To allow users to launch backups themselves, check **Authorize user to backup locally**.
 - To allow users to restore their data, check **Authorize user to restore**.
 - To display the Oodrive Save application interface when the Windows session starts, check **Display application when it starts**.
 - To display the Oodrive Save application splash screen when the Windows session starts, check **Display splash screen**.
 - To display the Oodrive Save application interface when launching a backup, check **Display the information window when the backup starts**.
 - To set this policy as your default policy, check **Define as default policy to add new users automatically**.
5. Click **Create**.

Once the policy has been created, it appears in the list of backup policies. If you chose to set it as your default policy, a floppy disk icon appears next to its name to help you identify it quickly.

You can now add backup sets to your new policy and associate users with it.

2.2. Step 2: Create a backup set

This step details how to add a backup set to your policy. Repeat it as many times as necessary to add other backup sets to your policy.

Please note: For performance reasons, it is strongly recommended that you limit the amount of data backed up to a maximum of 1 TB per backup set. If you want to back up a larger volume of data, we recommend that you divide it between several sets.

Step 1: Create the set

1. Go to the **Backup policies** section.
2. Click on the policy for which you wish to create a new backup set.
3. In the side panel on the right, click **New set**.

This takes you to the new backup set wizard.

4. Enter the name of your new backup in the **Name of the set** field.
5. Choose a storage location (online or local).

If you choose local storage, you need to specify the path to the location in the **Backup location** field. The path must end with the character “\”.

6. Check the **Enable offline backup** option to activate the temporary local backup of data sets in the event of a loss of network connection.

If the option is enabled:

- The backup is only performed if the data for backup accounts for 20% or less of the total capacity of the user’s hard disk.
- Online synchronization occurs automatically as soon as the network connection is restored.
- The temporary backup directory will be found in the “OoBackup” folder in the installation directory of the user’s desktop client.

7. Click **Next** to confirm your configuration and access the add items menu.

Step 2: Choose files to back up

1. Click **Add**.
2. Enter the data paths to protect in the **Location** field:
 - Each line represents an item for backup.
 - When backing up a folder, the path must end with the character “\”.
 - You cannot back up the root of a network path.

Careful: Remember that the backup set you are created will be available for a set of users; local files and folders may vary. For this reason, we recommend that you use environment variables when composing paths to locations.

For example:

- to select the “Documents” directory for a set of users, use the expression: **%userprofile%\Documents**
- to select all directories synchronized from OneDrive on users' computers, use the **%onedrive%** variable

Changing the retention settings

Location

To add directories to the selection, please enter a location followed by “\”

%userprofile%\Documents\

1 locations, including 0 error(s) and 0 duplicate(s) removed

Type ↓	Name	Location
Folder	Documents	%userprofile%\Documents\

Validate

The syntax for the path entered is checked automatically in order to identify errors and remove duplicates.


Note: Since version 7.7.0, Oodrive Save can back up files on volumes for which data deduplication is activated.

3. Click **Validate**.

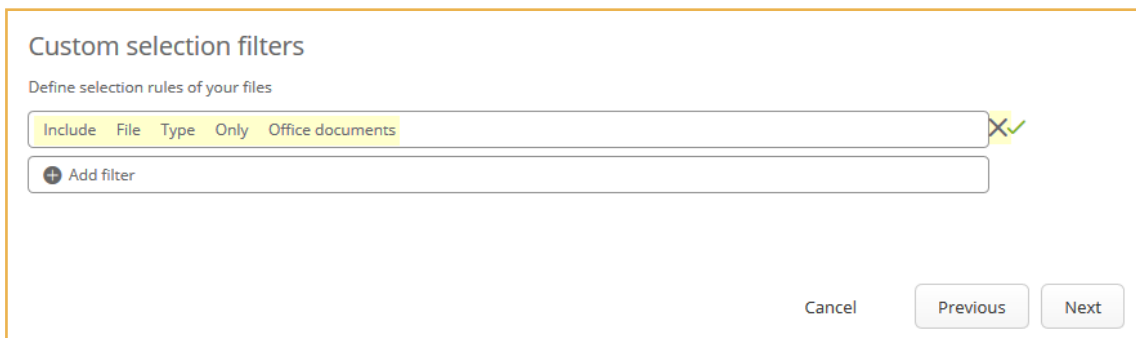
The location of the data displays in the **New backup set** window.

Apply exclusion or inclusion filters

1. In the **New backup set** window, click **Add filter** in the **Custom selection filters** section.
2. Choose whether to **Include** or **Exclude** by clicking on the drop-down menu.
3. Select the type of items to filter: **File**, **Folder**, **Any**.
4. Continue to refine the filter using the fields provided.

An information button  appears where a field requires a specific entry format. Hover over the information button to view the entry instructions.

5. Confirm your rule by clicking **+** to its right.



Careful: Clicking **X** removes your filter.


6. Repeat the process to add other filters.
7. Once you have finished, confirm your filters by clicking **Next**.

Step 3: Schedule backups

There are two types of backups: manual or scheduled.

Manual backups can be launched at any time, as needed, while scheduled backups run automatically and on a recurring basis, according to a predefined schedule.

1. Click **Add** to create a new schedule.
2. In the **New item** window, configure your backup schedule by entering:
 - The **Number of backups** to keep. This number must be between 1 and 60.
 - The backup **Frequency**: daily, weekly, monthly or continued.
 - The time and day of the backup; or alternatively, the time between each backup.
3. Confirm your choice by clicking **Add**.
4. Add as many schedules as necessary. You can add up to 10 schedules for a single backup set.

Note: If several schedules exist for the same backup set, you can reduce the number of manual backups saved, or choose not to save any. To do this, click on the edit icon  and edit the number of manual backups to keep.
5. Click **Finish** to validate your schedule and create the backup set.

The new set is created and a message is displayed, asking you whether to launch a backup for this set. If you do not wish to wait for the next scheduled backup, click **Yes** to launch an immediate backup.

2.3. Step 3: Define users

Once the backup policy has been defined, you must associate users with their assigned backup policy.

Users are created and managed from the platform's Users module. When a new user is created on the platform, they appear automatically in the **Users** section of the Backup Management module.

Technical Requirements:

- Users have an active account.
- Users have version 7.4.0 or later of the Oodrive Save PC client.
- Users are not yet associated with an existing backup policy.

Careful: To associate the user with a new policy, you must first remove the user from their current backup policy. Be aware that this action irreversibly erases the history and existing data for the user (backup sets, backups, notifications).

1. Go to the **Users** section.
2. In the list of users, check all users that you wish to add to the backup policy.

Name	Id	Policy	Version	Last backup date
<input checked="" type="checkbox"/> Gordon Mary	m.gordon		8.1.0	7/1/20, 9:30 AM
<input type="checkbox"/> Lefebvre Brigitte	b.lefebvre		8.2.0	
<input checked="" type="checkbox"/> Lopez Jane	j.lopez		8.1.0	
<input checked="" type="checkbox"/> Reynolds Allison	a.reynolds		8.1.0	
<input type="checkbox"/> Roberts James	j.roberts	External Consultants Policy	8.2.0	
<input type="checkbox"/> Rousseau Matthieu	m.rousseau	External Consultants Policy	8.2.0	
<input type="checkbox"/> Smith Kevin	k.smith	PMI Policy	8.2.0	
<input type="checkbox"/> Thompson Bob	b.thompson		8.1.0	
<input checked="" type="checkbox"/> Walker Jennifer	j.walker		8.1.0	

Users selected : 4 [Unselect users](#)

Name	Login	
Gordon Mary	m.gordon	⊗
Reynolds Allison	a.reynolds	⊗
Lopez Jane	j.lopez	⊗
Walker Jennifer	j.walker	⊗

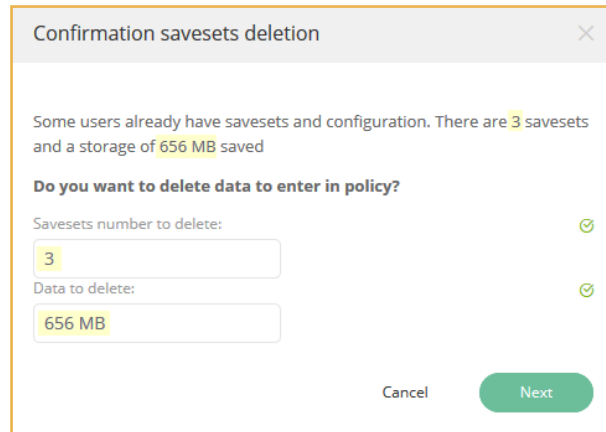
[Add to a policy](#)

3. In the side panel on the right, click **Add to a policy**.

Note: If the **Add** button is disabled, this means that one or more selected users are already associated with another backup policy or have a version of the Oodrive Save application that is earlier than 7.4.0 so cannot be added to a new backup policy.

4. If some of the selected users already have backup sets, a warning message shows the number of existing sets and the volume already backed up for all of the selected users. You are then prompted to confirm the complete deletion of the data before you can continue.

Enter the number of sets and the volume of data to delete, then click **Next**.



A confirmation dialog box titled "Confirmation savesets deletion" with a close button (X) in the top right corner. The dialog contains the following text: "Some users already have savesets and configuration. There are 3 savesets and a storage of 656 MB saved". Below this, it asks "Do you want to delete data to enter in policy?". There are two input fields: "Savesets number to delete:" with the value "3" and "Data to delete:" with the value "656 MB". To the right of each input field is a green checkmark icon. At the bottom right, there are two buttons: "Cancel" and "Next".

Careful: This action will result in the complete deletion of the backup history for the selected users.


5. Select a backup policy, and click **Add**.

The selected users are now associated with the backup policy. You can view the Policy column in the user list to find out which backup policy each user is associated with.

3. Managing backup policies

3.1. Edit a backup policy

Rename a policy

1. Go to the **Backup policies** section and click on the policy you wish to rename.
2. In the side panel on the right, click on the Edit icon .
3. Modify the name of your policy.
4. Click **Update** to save your changes.

Modify a policy configuration

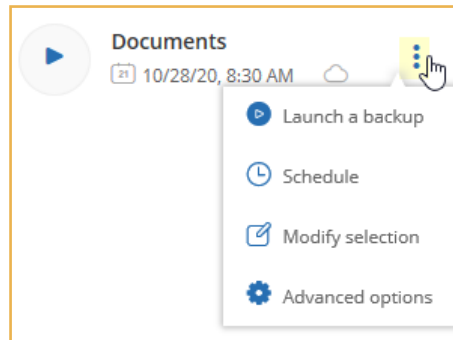
You can make changes to the configuration options of a backup policy at any time after creating it.

1. Go to the **Backup policies** section and click on the backup policy you wish to modify.
2. In the side panel on the right, click on the **Configuration** tab.
3. In the **Advanced options** section, click **Update**.
4. Make changes as desired.
5. Click **Update** to save your changes.

Edit a backup set

From the **Backup policies** section, you can click on a policy to view all of the backup sets linked to it and make changes to them:

1. Go to the **Backup policies** section and click on the backup policy of your choice.
2. In the side panel on the right, click on the **Backups** tab.
3. Identify the backup set you wish to edit and click on the three small dots located on its right:



4. Make changes as desired:
 - To **edit backup schedules** for a set, click **Schedule**.
 - To **edit the backup selection**, click **Modify selection**.
 - To **configure offline backup**, click **Advanced options**.

Note: If some of your users have custom sets, please note that you can edit them in the same way from the information forms of the users in question.

Remove a user from a policy

It is possible to remove a user from their backup policy.

This action will not delete the user's history: the user's account will therefore retain any backup sets, backups, notification settings and reports previously created. However, this data will be permanently lost if the user is added to a backup policy again.

1. From the **Backup policies** section, select the backup policy you want to edit.
2. Click on the **Users** tab.
3. Click on the trash icon to the right of the user that you wish to remove.
4. Confirm removal of the user by clicking **Remove**.

Note: It is also possible to remove a policy directly via a user's information form. To do this, click on the cross to the right of the backup policy, then confirm removal of the policy by clicking **Remove**.


3.2. Set the default backup policy

If you want to automate the association of users with a backup policy, you can create a default policy.

Once a default backup policy has been set, all new users will be associated with that policy automatically when their account is created.

1. Go to the **Backup policies** section and click on the backup policy you wish to define as your default policy.
2. In the side panel on the right, click on the **Configuration** tab.
3. In the **Advanced options** section, click **Update**.
4. Enable the **Define as default policy to add new users automatically** option.
5. Click **Update**.

A floppy disk icon indicates the current default policy.

Marketing Policy	2
General Policy 	4
PM Policy	2

Please note: If you had already set another default policy, you must confirm your choice to replace it.


The former default policy will keep its associated users. If you want to associate these users with the new default backup policy, you will need to do it manually.

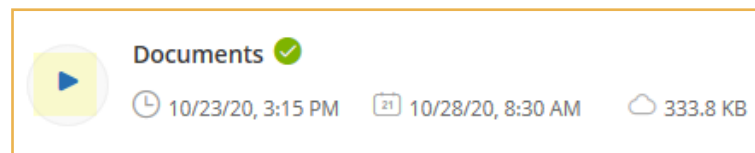
If you no longer want your users to be automatically added to a backup policy, return to the advanced options of the default policy and disable the **Define as default policy to add new users automatically** option.

3.3. Back up manually

You can launch a manual backup for a backup set. For example, if a scheduled backup has been missed, you can choose to launch it manually.

You can launch a manual backup for all users in the policy, or for one specific user only.

1. Go to the backup sets:
 - If you wish to launch the backup for **all users** in a policy, go to the **Backup policies** section and select this policy.
 - If you wish to launch the backup for **one user only**, go to the **Users** section and click on the relevant user.
2. From the **Backups** tab, identify the set for which you wish to launch a backup and click on the manual launch button .



3. If you have several schedules, choose the one whose backup you wish to keep.
4. Click **OK** to launch the backup.

An hourglass appears in place of the manual launch button, indicating that the backup is in progress.

3.4. Clean blocks when scheduling a local backup

In order to optimize storage space when making local backups, you can start a block cleaning process when scheduling or manually launching a backup.

1. Go to the **Backup policies** section and select a policy.
2. In the side panel on the right, identify a backup set with a local storage location.
3. Click on the three small dots to the right of the backup set and select **Schedule**.

- Click on the toggle switch in the **Optimize local storage** column to activate cleaning.

Type	Settings	Backup	Status	Optimize local storage ⓘ
Manual	-	7		
Daily	Mon. Tue. Wed. Thu. Fri. at 08:30	7		

Cancel Save

- Click **Save**.

Once you activate this option, block cleaning will be performed at the end of the backup. The operation may take several minutes.

You can return to the scheduling options for a backup at any time to activate or deactivate local storage optimization.

4. Managing custom configurations

It is possible to manage users requiring a specific configuration on a case-by-case basis. In this case, the user is not associated with any backup policy and the custom configurations are made from the user's information form.

You can access a user's information form by clicking on the user of your choice in the **Users** section. From a user's information form, you can:

- Create and manage the user's backup sets,
- Enable or disable restricted access.

4.1. Create a backup set from a local file manager

You can select items for backup directly from a user's local file manager without using a remote access tool.

This feature is only available for users who are not part of a backup policy.

Before you can access a user's local file manager, you need to check that:

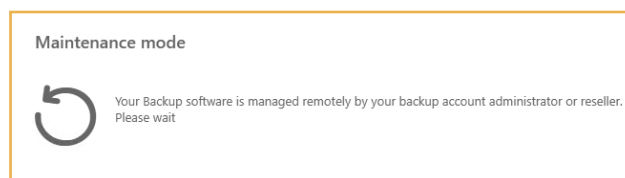
- The Oodrive Save PC client is running on the user's machine.
- Remote viewing access permissions are enabled on the user's PC client.

Note: Remote viewing access permissions are enabled by default. If a user has disabled this option, they can re-enable it from the Configuration menu of the Oodrive Save PC client, even when restricted access is enabled.

Step 1: Connect to the local file manager

1. From the **Users** section, click on the user for whom you wish to create a set.
2. Click **Connect**, to the right of the user name.

Once the connection has been established, your user will be notified of this fact on their PC client and will be asked not to take any action during the operation:



Step 2: Create the set

1. Click **New set**.

This takes you to the new backup set wizard.

2. Enter the name of your new backup in the **Name of the set** field.
3. Choose a storage location (online or local).

If you choose local storage, you need to specify the path to the location in the **Backup location** field. The path must end with the character “\”.

4. Check the **Enable offline backup** option to activate the temporary local backup of data sets in the event of a loss of network connection.

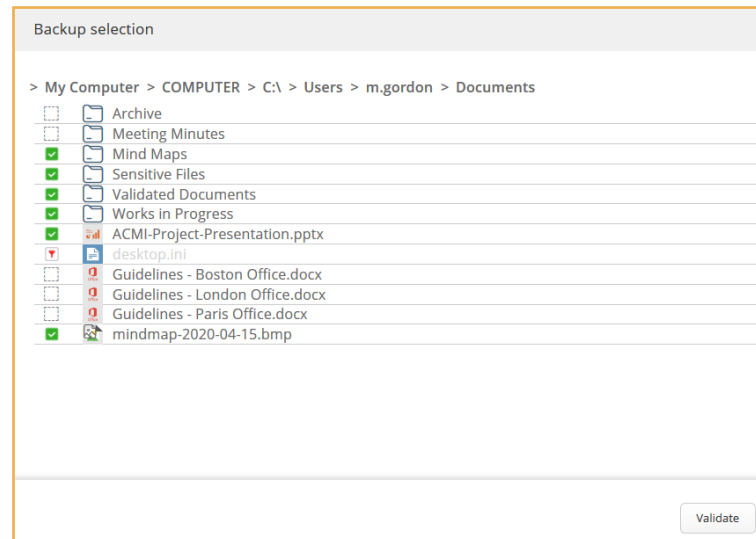
If the option is enabled:

- The backup is only performed if the data you want to back up accounts for 20% or less of the total capacity of the user’s hard disk.
- Online synchronization occurs automatically as soon as the network connection is restored.
- The temporary backup directory will be found in the “OoBackup” folder in the installation directory of the user’s desktop client.

5. Click **Next** to confirm your configuration and access the add items menu.

Step 3: Choose files for backup in the local file manager

1. Click **Browse the computer's files**.
2. Select the items for backup in the user's local file manager.



Please note: For performance reasons, it is strongly recommended that you limit the amount of data backed up to a maximum of 1 TB per backup set. If you want to back up a larger volume of data, we recommend that you divide it between several sets.


3. When you are finished, click **Validate** to confirm your selection.

The location of the selected data will be displayed in the New backup set window.

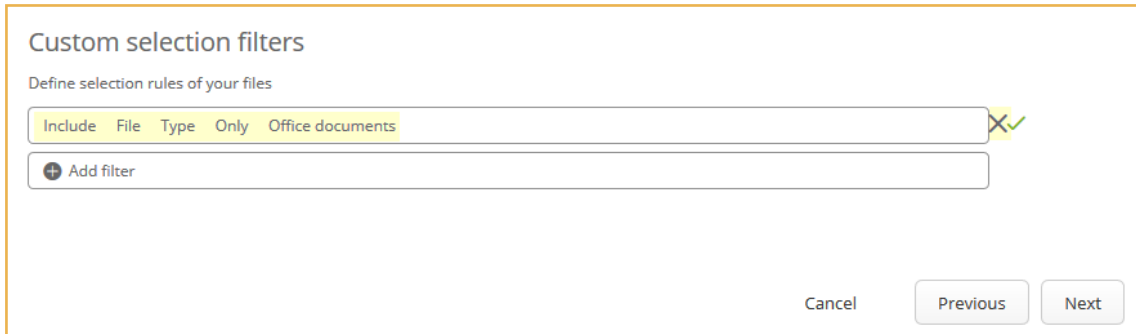
Note: You can also manually enter paths for the data you want to back up. To do this, click **Add** in the **New backup set** window.

Apply exclusion or inclusion filters

1. In the **New backup set** window, click **Add filter** in the **Custom selection filters** section.
2. Choose whether to **Include** or **Exclude** by clicking on the drop-down menu.
3. Select the type of items to filter: **File**, **Folder**, **Any**.
4. Continue to refine the filter using the fields provided.

An information button  appears where a field requires a specific entry format. Hover over the information button to view the entry instructions.

5. Confirm your rule by clicking **+** to its right.



Careful: Clicking **X** removes your filter.


6. Repeat the process to add other filters.
7. Once you have finished, confirm your filters by clicking **Next**.

Step 4: Schedule backups

There are two types of backups: manual or scheduled.

Manual backups can be launched at any time, as needed, while scheduled backups run automatically and on a recurring basis, according to a predefined schedule.

1. Click **Add** to create a new schedule.
2. In the **New item** window, configure your backup schedule by entering:
 - The **Number of backups** to keep. This number must be between 1 and 60.
 - The backup **Frequency**: daily, weekly, monthly or continued.
 - The time and day of the backup; or alternatively, the time between each backup.
3. Confirm your choice by clicking **Add**.
4. Add as many schedules as necessary. You can add up to 10 schedules for a single backup set.

Note: If several schedules exist for the same backup set, you can reduce the number of manual backups saved, or choose not to save any. To do this, click on the edit icon  and edit the number of manual backups to keep.

5. Click **Finish** to validate your schedule and create the backup set.

The new set is created and a message is displayed, asking you whether to launch a backup for this set. If you do not wish to wait for the next scheduled backup, click **Yes** to launch an immediate backup.

You can now click **Disconnect** to the right of the user name to exit the remote desktop access.

4.2. Configure restricted access

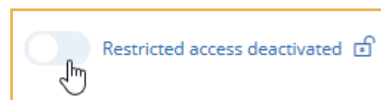
Restricted access is a secure mode that prevents any interaction with backup sets or Oodrive Save's advanced menus from the user's computer, in order to protect it against malicious activity and ransomware.

When a user wishes to manage their backup sets, they can temporarily disable restricted access on their computer using a password sent to them by their backup administrator. Restricted access is automatically re-enabled after 10 minutes of inactivity, or if the desktop client window is closed.

Restricted access is enabled manually from the individual user's information form.

Please note: Once the user has been added to a backup policy, you can no longer edit the restricted access status.

1. From the **Users** section, click on the user you wish to configure restricted access for.
2. From the **Backups** tab, click on the toggle switch to enable restricted access.



3. In the Activating restricted access window, enter your email address or the address of another backup administrator.

This address will be used to renew the restricted access password if it is forgotten.

Careful: You must never enter the address of the backup user, as an attacker with access to this address could then recover this password and disable restricted access.

4. Set the password that will temporarily disable restricted access:
 - The password must contain at least 8 characters.
 - It must contain one uppercase letter, one digit and one special character.

Note: Be sure to keep a record of this password: if you forget it, you will need to set a new one.

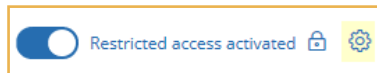
5. Re-enter the supplied password.

6. Configure the actions that are possible when restricted access is enabled:

- Check **Authorize backup** to enable the user to launch a backup when restricted access is enabled.
- Check **Authorize restore** to enable the user to restore a backup set when restricted access is enabled.

7. Confirm the activation or modification of restricted access by clicking **Activate**.

Once restricted access has been enabled, you can make changes to its settings by clicking on the cog icon, which now appears to the right of the lock icon.



Disable restricted access at any time by clicking on the toggle switch again.

5. Monitoring backup and recovery activities

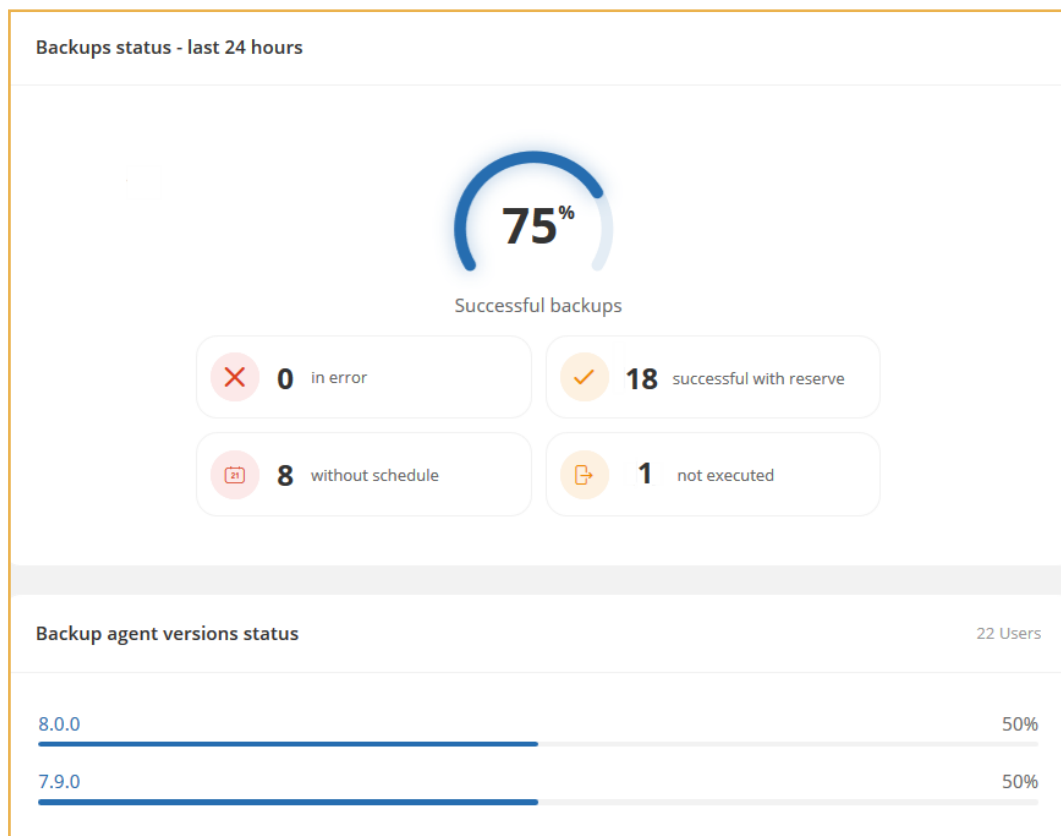
As a backup administrator, you monitor backup and recovery activities for your user base, and take action wherever necessary.

You can:

- Track the status of backups
- Manage automatic alerts and reports
- View backup configuration reports
- View backup and recovery reports
- Monitor actions that have affected your users

5.1. Track the status of backups

The Backup Management module dashboard gives you access to backup statistics for your user base from the past 24 hours:



These statistics change in real time, and you can click on a backup status for direct access to the relevant list of users.

- To correct a **backup in error** or **successful backup with reserve**: view the backup reports for the relevant users. The information provided by the report may help you to identify and correct the issue.
- To correct a **Backup not executed**: ensure that the computer(s) of the relevant users(s) are running, and launch a manual backup.

5.2. Manage automatic alerts and reports

You can manage the auto-send settings for backup alerts and reports. You can:

- Enable or disable the sending of reports and alerts,
- Set thresholds to trigger the sending of reports or alerts,
- Specify recipients of reports and alerts.

You can manage the auto-send settings for the following alerts and reports:

Reports	Error alerts	Storage alerts
<ul style="list-style-type: none"> • Backup report • Backup errors report • Automatic recurring backup set selection analysis 	<ul style="list-style-type: none"> • Ransomware detection • Missed schedules • Files not backed up • Backup of empty folders 	<ul style="list-style-type: none"> • Storage media integrity issues • Reduced storage • 80% overstorage alert • 100% overstorage alert

You can manage these settings via the backup policy for all users linked to it, or from the information form for all users not linked to any policy.

1. To manage alerts and notifications, go to the alert management window:

For users of a backup policy:

- Select the backup policy in the **Backup policies** section.
- From the **Configuration** tab in the side panel on the right, go to the **Alerts and reports** section and click **Update**.

For a specific user:

- Select the user of your choice in the **Users** section.
- From the **Information** tab of the user's information form, go to the **Alerts** section and click **Edit**.

2. In the **Edit alerts** window, set the alerts and reports the user should receive, checking the related **User** box.
3. If you wish to add other recipients, enter their email addresses in the **Other e-mail recipient** field and press **+**.

Please note: If you want to be notified when significant changes to a backup set are detected, we invite you to set up the three following alerts:

- **Send an alert when the number of files that are no longer saved exceeds ... % of the selection**
- **Send an alert when one or more selected folders are empty**
- **Send an alert when storage space is reduced by ... %**

4. If necessary, set thresholds that will automatically trigger the sending of alerts.

5. Click **Save**.

5.3. View backup configuration reports

The backup configuration report contains all information associated with a user's account and backup configurations. If you are a Reseller, this report can be used as a contractual document to present to your customers.

1. Click on the **Users** tab along the top of the page.
2. Click on the user whose configuration report you wish to view to access their information form.
3. Go to the **Information** tab and click **View configuration report**.

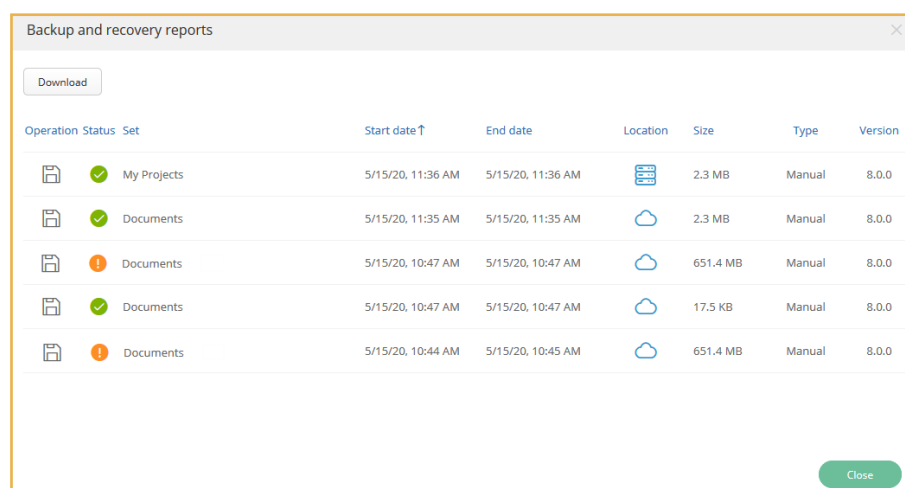
The backup configuration report opens in a new browser tab.

4. You can save the configuration report or print it directly from your browser:
 - To save the report on your machine, right-click on the document and select **Save as...**
 - To print the report, press **Ctrl+P** and configure your print settings.

5.4. View backup and recovery reports

You can view the history of a user's backup and recovery reports.

1. Go to the **Users** section.
2. Click on the user of your choice to go to their information form.
3. Go to the list of backup and recovery reports:
 - To view all of a user's backup and recovery reports (all sets combined), go to the **Information** tab and click **View backup reports**.
 - To view **the backup and recovery reports for one set in particular**, click on the three dots to the right of the set name and select **Reports**.
4. The **Backup and recovery reports** window opens, allowing you to view the various backup and recovery reports.



Operation	Status	Set	Start date	End date	Location	Size	Type	Version
		My Projects	5/15/20, 11:36 AM	5/15/20, 11:36 AM		2.3 MB	Manual	8.0.0
		Documents	5/15/20, 11:35 AM	5/15/20, 11:35 AM		2.3 MB	Manual	8.0.0
		Documents	5/15/20, 10:47 AM	5/15/20, 10:47 AM		651.4 MB	Manual	8.0.0
		Documents	5/15/20, 10:47 AM	5/15/20, 10:47 AM		17.5 KB	Manual	8.0.0
		Documents	5/15/20, 10:44 AM	5/15/20, 10:45 AM		651.4 MB	Manual	8.0.0

Note: By default, reports are ordered by date, but you can click on a column heading to sort reports according to the criterion of your choice.

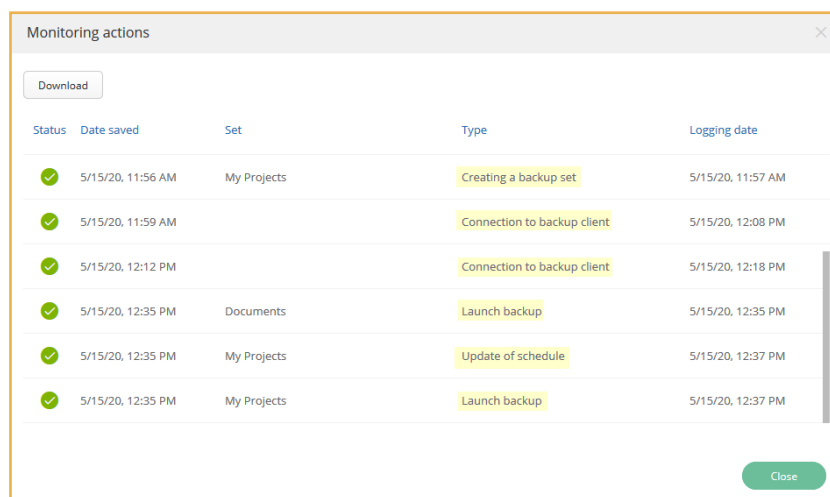
5. Click on a report to display its details in a new browser tab.

If you wish to download a list of backup and recovery reports in **.csv** format, click **Download** in the upper-left corner of the **Backup and recovery reports** window.

5.5. Monitor actions

Several backup administrators may intervene on a user's account. In order to monitor the various interventions, you can view all of the actions performed for a user or any of their backup sets.

1. Go to the **Users** section.
2. Click on the user of your choice to go to their information form.
3. Go to the Monitoring actions window:
 - To view **all of the actions** performed for a user, go to the Information tab and click Monitoring activities.
 - To view **only the actions performed on one backup set in particular**, click on the three dots to the right of the set name and select **Actions**.
4. The **Monitoring actions** window opens, allowing you to view all actions that have affected the user.



Status	Date saved	Set	Type	Logging date
✓	5/15/20, 11:56 AM	My Projects	Creating a backup set	5/15/20, 11:57 AM
✓	5/15/20, 11:59 AM		Connection to backup client	5/15/20, 12:08 PM
✓	5/15/20, 12:12 PM		Connection to backup client	5/15/20, 12:18 PM
✓	5/15/20, 12:35 PM	Documents	Launch backup	5/15/20, 12:35 PM
✓	5/15/20, 12:35 PM	My Projects	Update of schedule	5/15/20, 12:37 PM
✓	5/15/20, 12:35 PM	My Projects	Launch backup	5/15/20, 12:37 PM

This screen lets you view:

- The history of actions performed from the Backup Management module,
- The status of each of these actions, indicating whether or not the action was logged by the application on the user's computer.

5. Filter the various actions in the list according to their **Status**, **Date saved**, **Type** and **Logging date** by clicking on the column titles.

If you wish to download a list of actions in **.csv** format, click **Download** in the upper-left corner of the **Monitoring actions** window.

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