

SOS ServerSave

Installation and
User Guide



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Chapter 1: Introduction

1.1 What is SOS ServerSave?

Welcome to the **SOS ServerSave Server Edition** User Guide. This guide briefly describes the **SOS ServerSave Application Suite** and the how components work together. Of course, we also show you how to install each application. To learn about the features, product details, and usage, see the user guide for each application.

SOS ServerSave Application Suite

The **SOS ServerSave Application Suite** consists of these applications:

- **ImageCreator** - Create and recover bare metal images of your systems
- **ImageStream** - designed specifically to backup large image files created by **ImageCreator**, this program is typically installed on a *staging machine*
- **Exchange Granular Recovery (EGR)** - used to recover data from your Exchange .EDB file at a message level or for full hardware migration projects
- **Management Agent** – With this administrative tool you can create universal backup policies, manage client machines, and create reports.
- **Online Backup** – Perfect for workstations, laptop fleets, backup and protect data from the source.

SOS ServerSave enables you to:

- Create live backups while you work.
- Schedule automatic backups of files and folders only, or include applications and operating system
- Restore your system to a previous state
- Backup and recovery of entire folders or individual files
- Save backup files to any disk device, removable media, network location, or the SOS cloud
- Remote access to recover your system and data
- Perform a quick and simple bare metal system restore
- Perform *Exchange Granular Recovery* for your email server, including to individual message recovery

Backup Image Staging

Because system image files can be large, you should not save backup images on production application environments, but rather on *staging* machines. Staging is, quite simply, a temporary data storage space. Although it isn't mandatory, we recommend that you designate and configure one of your computers as a staging server.

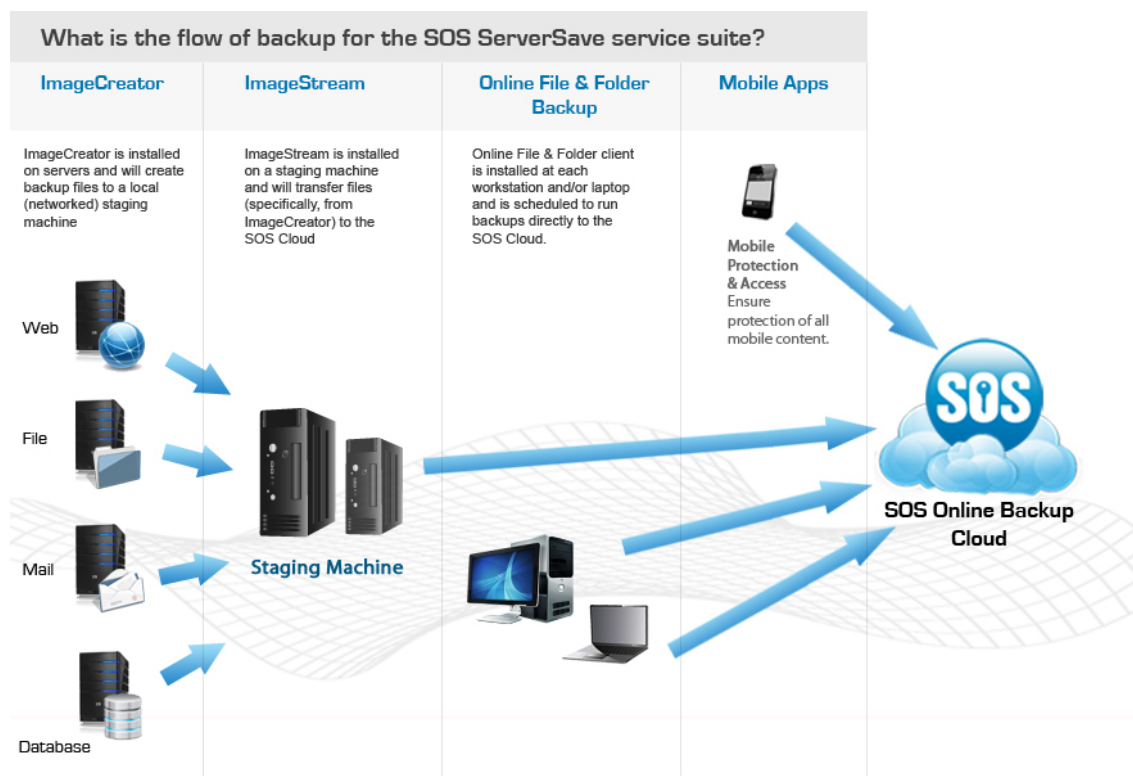


Figure 1: Typical backup data flows

System Recommendations for Staging Server

The staging server can be quite modest, such as a Windows 7 workstation with 8GB of memory, but with enough free space to handle the backup images and files you'll be sending to this machine before going up to the SOS website. The backup process design will minimize the impact to mission-critical production resources.

1.2 Getting Help

If you have a problem that cannot be solved by following the procedures in this guide, please contact technical support for assistance using any of these methods:

Telephone	877-896-3611
Email	info@sosonlinebackup.com
Website	http://www.sosonlinebackup.com/online-backup-service/computer-backup-support.htm

1.3 SOS ServerSave Licensing

SOS ServerSave licensing is based on the number of computers you are protecting using the software. If you are using **SOS ServerSave** to backup 100 computers, you will require 100 licenses.

Chapter 2: System Requirements

To run properly, **SOS ServerSave** must run on systems having minimum specifications, which we list below.

2.1 Supported Operating Systems

- Windows XP and later
- Windows® Server 2003 and later:
- Support for Windows® 64 bit Operating Systems

2.2 Supported File Systems

SOS ServerSave Server Edition supports the following file systems: FAT32, FAT32X, NTFS and Dynamic Disks.

2.3 Supported Storage Media

SOS ServerSave Server Edition supports the following storage media: any disk drive including network drives, SAN, NAS, iSCSI, SCSI, USB or FireWire or optical media including CD/DVD/Blu-Ray.

Chapter 3: Installing SOS ServerSave

3.1 Choosing Components

SOS ServerSave is a suite of applications that offers many options for backup and recovery. **SOS ServerSave** offers two choices for the foundation of your backup solution. You can backup individual files, or capture an image of an entire disk. When considering which one is best, ask yourself:

- Do I need to choose the files and folders I want to backup?
- In the event of a catastrophic disk failure, do I need to retain the settings in the operating system?
- Do I have a small amount of local disk space to store my backup images?
- Is this backup for an email server, database, or back-end server?

If the answers to all of these questions is no, then Online Backup may be adequate for you. Otherwise, you should choose **ImageCreator** along with **ImageStream** to create a disk image and backup the entire disk.

If your backup requirements are more complex, then we recommend that you install **ImageCreator** and **ImageStream**. You can install the **Management Agent**, you can create universal backup policies, manage client machines, create reports, and more. For example, if you're backing up a Microsoft™ Exchange Email server and would like precise recovery and migration control, then you will want to install and configure **Exchange Granular Recovery**.

IMPORTANT: Online Backup and ImageStream cannot be installed together, and ImageStream must be installed and run first, prior to Exchange Granular Recovery.

3.2 Download ServerSave

Then follow these steps to install and become familiar with the **SOS ServerSave** portal:

1. First, download the SOS Online Backup Installer file from:

<http://www.sosonlinebackup.com/pcauthority/serversave/serversave.exe>.
2. Save the file to your computer and launch it.
3. When the login window appears, simply login with the **Username** and **Password** for your account (you may find these in your welcome e-mail message).

4. The **ServerSave Applications Suite** portal will appear. In it, you'll find a number of icons to the applications for **SOS ServerSave**. Initially, all applications will have a **Not Installed** status above the icon. Of course, this status will change to **Installed** as you install and configure each application.

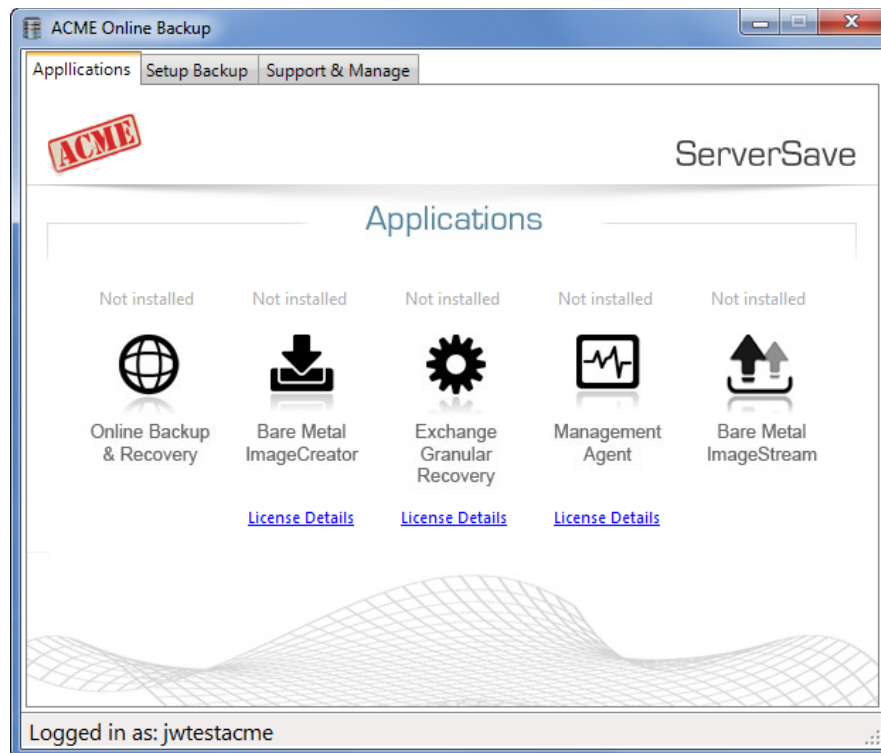


Figure 2: ServerSave Portal Window

5. Along the top of the window, you'll find two additional tabs, **Setup Backup** and **Support & Manage**.
6. Click on the **Setup Backup** tab to view images that represent several different backup scenarios. Clicking on these images will display windows with buttons that launch the same installers found on the **Applications** tab.
7. Click the **Support & Manage** tab to find links for support and ordering more space or licenses. You can also view your account summary. Click the **Go to Web Portal** link to access your account page.
8. Return to the **Applications** tab to begin installing applications.

Chapter 4: ImageCreator

The chapter covers the installation, configuration and use of the **ImageCreator** application. Naturally, we begin with installation.

4.1 Installing ImageCreator

Follow these steps to install this application:

1. Click the **BareMetal ImageCreator** icon.
2. In the next window, click the **Download** button. You will see the progress of the download until it reaches the end, after which a message will appear indicating “Download Completed.”
3. Click **OK** to return the **ServerSave Portal**,
4. Next, click the **Install App** button to launch the installation wizard:

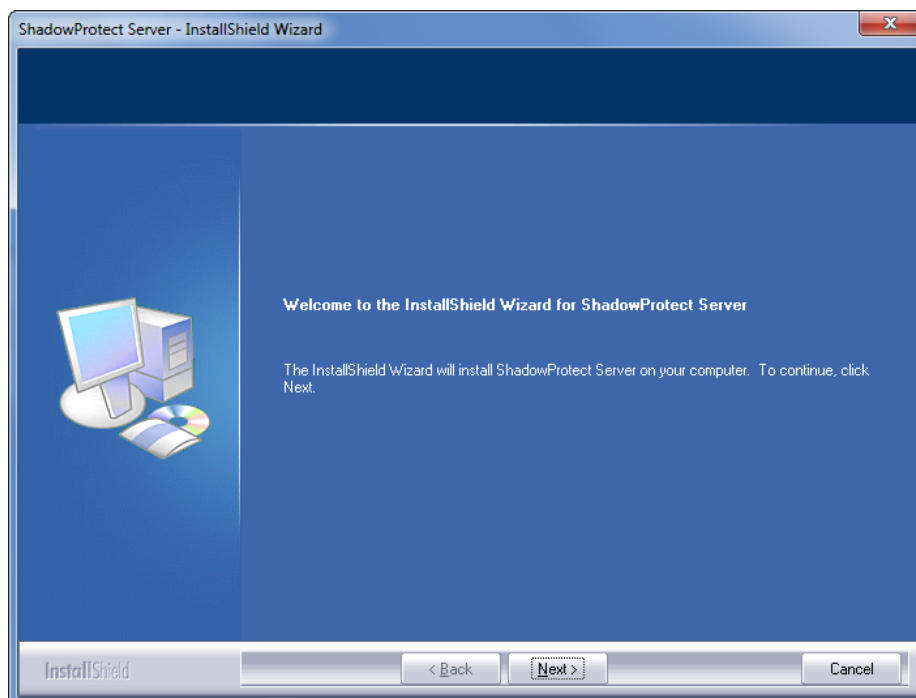


Figure 3: First step in ImageCreator installation

5. Click the **Next** button to continue, and then choose the option to **accept the terms in the license agreement** and click **Next** once more.

6. If you want the simplest installation and you have plenty of disk space, choose the **Complete** setup option.
7. Choose the **Custom** setup option if you want to change the installation directory, or to install only some of the components.
8. Accept the default **Complete** setup, or you can choose to customize the setup by clicking the **Custom** radio button and clicking **Next**.
9. In the next step, you may optionally choose a different destination folder by clicking the **Change** button. Otherwise, accept the default path by clicking the **Next** button.
10. In the next step, you'll see a selection screen that looks like the figure below:

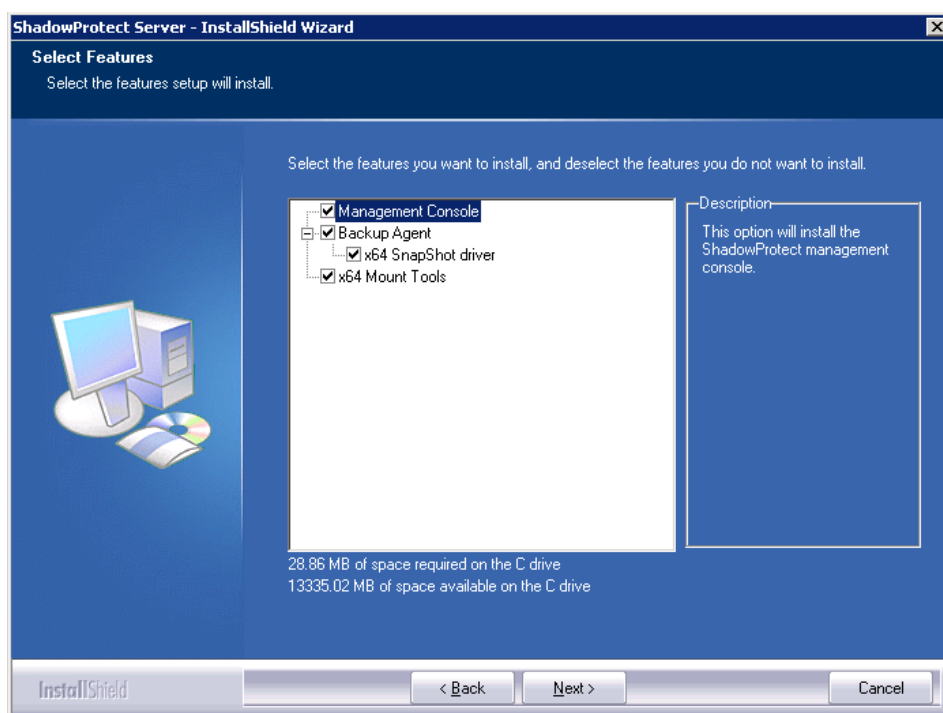


Figure 4: ImageCreator component selection

11. Uncheck the boxes adjacent to any components you don't want to install. If you don't have a 64-bit computer, then you can uncheck the "x64" boxes to save on some disk space.
12. Review the disk space consumption statistics at the bottom of the panel, and then click the **Next** button to move on to the last step of the wizard. Once there, consider if you need to click the **Back** button and review the installation settings. Otherwise, click **Install** to launch the installation script.
13. After a few moments, a window will appear to indicate that the installation is complete. Since this application will not function properly until you perform a restart, we recommend

that you restart immediately. If necessary, you can defer a restart until later. Simply click the radio button having the label **No, I will restart my computer later**.

14. If you take our recommendation to restart immediately, you'll want to close any other applications first, then click the **Finish** button to restart.
15. After rebooting the computer, launch the application by choosing **Start > All Programs > Shadow Protect > Shadow Protect Server**. After a brief moment, the application window will appear.



IMPORTANT: We recommend that you use continuous incremental when setting up your very first backup. See the ***ImageCreator User Guide, ServerEdition*** to learn how to use this application to perform backups.

Chapter 5: ImageStream

ImageStream is a tool for configuring automatic file backups for storage in the **SOS ServerSave** cloud. After choosing files and folders for backup, you configure a backup schedule. You can set the backup to run daily, weekly, or monthly.

Continuous Incremental Backups

Initially, the backup will copy each and every one of the files and folders you specify. After that, any subsequent backups will only copy items that have been changed since the last backup. This is what we call *continuous incremental backup*.

On-the-Spot backups

You can also perform immediate, on-the-spot backups, which might be important after making especially valuable changes to some of your files. And, at any time, you can restore your files and folders-either by choosing individuals file or an entire backup set. Learn more in the sections below.

The chapter covers the installation, configuration and use of the **ImageStream** application. Naturally, we begin with installation.

5.1 Installing ImageStream

In this section we describe how to install the **ImageStream** application. Please take the following into consideration:

IMPORTANT

- **Online Backup** and **ImageStream** cannot be installed together.
- For **Exchange Granular Recovery (EGR)** to function properly, you must install **ImageStream** first.
- If **EGR** support is your only requirement for this tool, then it's unnecessary to perform any additional configuration of **ImageStream** after you complete the installation.

Follow these steps to install **ImageStream**:

1. To install this application, click the **ImageStream** icon and then, in the next window, click the **Download** button. You will see the progress of the download until it reaches the end, after which a message will appear indicating "Download Completed."

2. Click **OK** to return the **ServerSave Installer**, and then click the **Install App** button to launch the installation wizard.
3. After a few moments, a window will appear to prompt you to install the application:

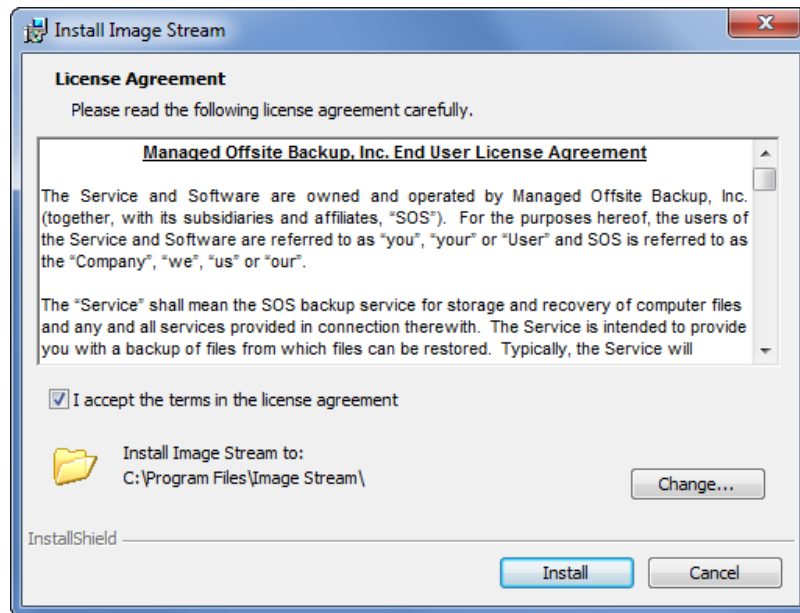


Figure 5: First step in the ImageStream installation selection

4. Check the box (if it's empty) to acknowledge that you accept the terms of the license agreement.
5. Though we don't recommend it, you can opt to click the **Change** button to choose a different installation folder.
6. Click the **Install** button to launch the wizard, which may take a few minutes to run.
7. You'll know the application is ready when the login window appears (see figure):

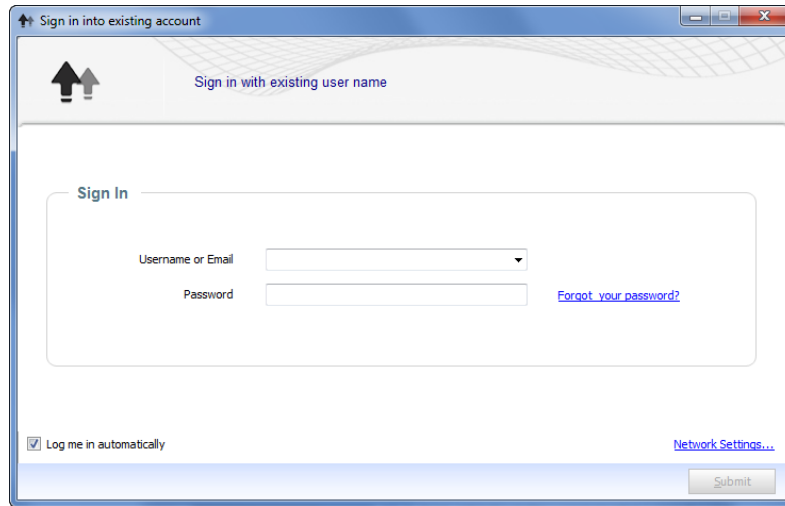


Figure 6: The ImageStream login window

8. Here, enter your **SOS ServerSave Username** and **Password** and click the **Submit** button. After a few moments, the application main window will appear, confirming that your installation is complete.



IMPORTANT: If you're installing **ImageStream** merely as support for **Exchange Granular Recovery**, it is unnecessary to proceed with any configurations within **ImageStream**. You may simply exit the tool.

5.2 Launching ImageStream

To launch **ImageStream**, you can either:

- Click the **ImageStream** icon in the **ServerSave Portal**, or
- From the Windows™ **Start Menu**, choose **Programs > ImageStream > ImageStream**

The figure below depicts the main window for **ImageStream**:

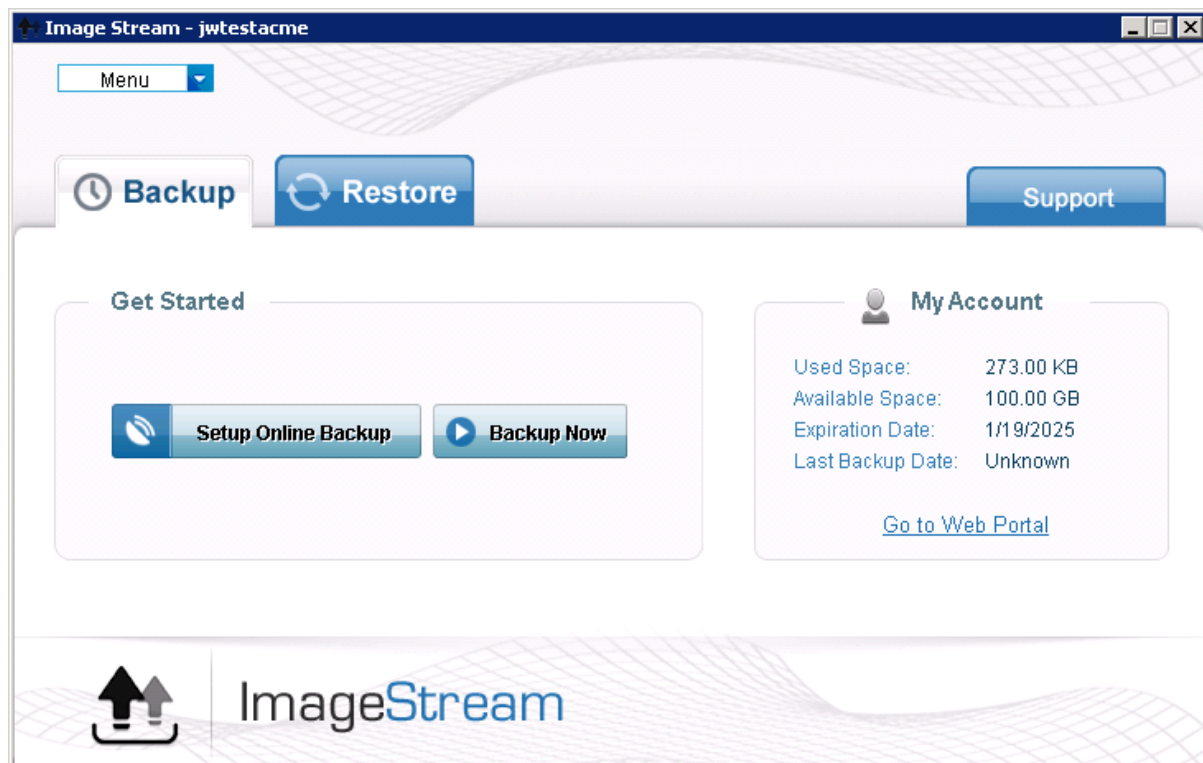


Figure 7: The ImageStream Main Window

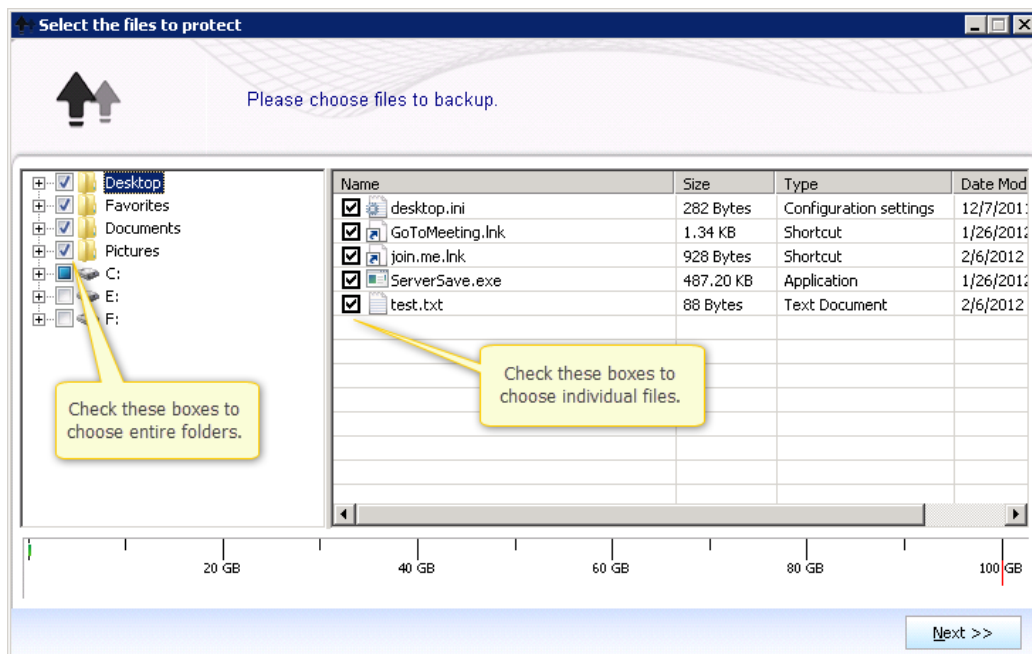
Take a moment to survey all of the elements in this window:

- The **Backup**, **Restore** and **Support** tabs
- The **Menu** in the upper left corner
- The contents of the **Backup** tab are visible when the window first appears
- In the **Backup** tab, locate the **Setup Online Backup** and **Backup Now** buttons
- Also, take note of the **My Account** section-which includes a link to the Web Portal.

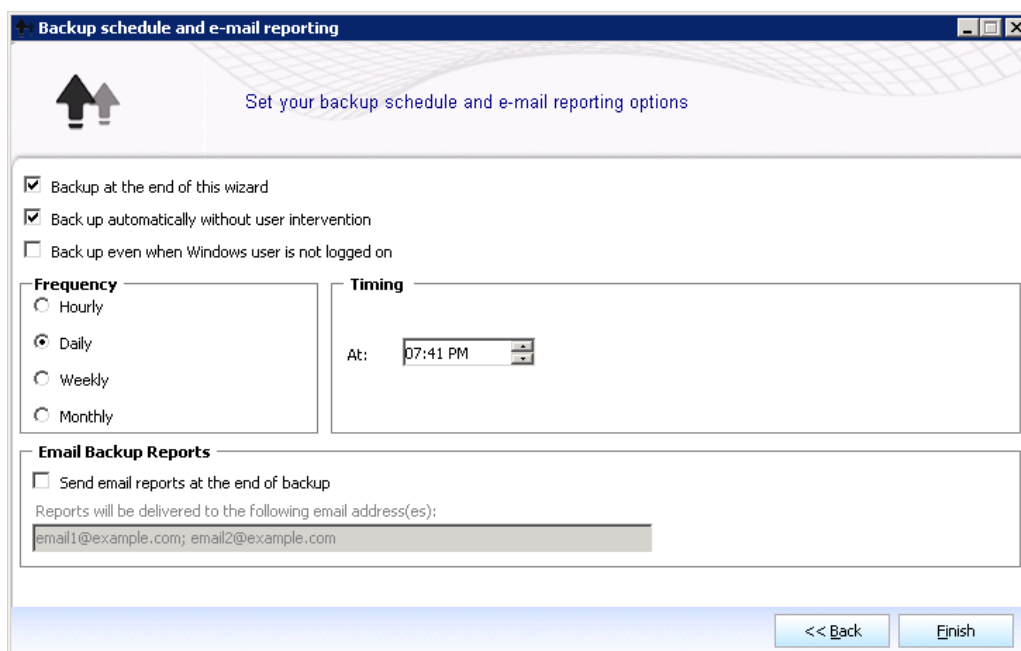
5.3 Configuring Online Backup

Setting up an online backup with **ImageStream** is quite simple: you choose files and folders, decide upon a schedule, and optionally choose to receive email reports. Follow these steps to configure an online backup:

1. In the **Backup** tab, click the **Setup Online Backup** button.
2. In the window that appears, you can select folders and / or individual files that you want to backup. See the figure below for visual cues. In consideration of performance and space constraints, we do not recommend backing up an entire drive with ImageStream (e.g., C:\).



3. When you're happy with the file and folder selections, click the **Next** button in the lower left corner of the window.
4. In the next window, you may configure the scheduling. Notice the default settings, and then decide if you need to make any changes.



5. Uncheck **Backup at the end of this wizard** if you would rather wait to perform the backup at the time you schedule.
6. Uncheck **Backup automatically without user intervention** if you would rather receive a prompt before the backup begins. If you leave a check in this box, the backup will run in the background at the time you schedule.
7. Check the box **Backup even when Windows user is not logged on** if you would like the backup to run when the computer is running without an active user login.
8. Notice the **Frequency** and **Timing** sections. The default **Frequency** is **Daily**, and the **Timing** is set to the time at which **ImageStream** was open. You can change the **Timing** by editing the hour, minutes and AM/PM setting.



IMPORTANT: Large, frequent backups may cause a significant decrease in computer performance.

9. If you prefer, you can change the frequency to **Hourly** and then select the number of **Hours** indicating how often you want the backup to occur. It's important to realize that large, frequent backup sets may slow the computer down.
10. Alternatively, you could choose **Weekly** and then choose a time and day, or choose **Monthly** and select the time of day and the day of the month on which to perform the backup.
11. Optionally, you can check the box **Send email reports at the end of backup** to send a backup status report to the email address that you specify the text box immediately below.
12. Click **Finish** to complete the schedule setup.

5.4 Immediate Backup

If you want to perform a backup now, simply go to the **Backup** tab and click the **Backup Now** button. This backup will go into online storage along with any other backups. (It will appear in the listing between the backups that run on the regular schedule.)

5.5 Restoring Files

It's also quite easy to restore your files. Follow these steps:

1. Click the **Restore** tab, and then click the **Online Restore** button.
2. In the window that appears, you can configure several settings to search for backups.

Image Stream

Step 1: Search for backups to recover from

On this calendar, please click a date. Only backups that were run before and up to this date will be included in your search results.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	1	2	3
4	5	6	7	8	9	10

Today: 2/8/2012

Refresh recovery data

What size is it (KB)?

< []

What type is it?

All Files and Folders (*.*)

All or part of the filename

[]

When you click 'Next', you will see all the files you have backed up that are of any size, are of any file type and have any filename.

Cancel Next >>

3. The most important setting is the date. Move the calendar arrows and then choose a particular date. The search will look for all backups that were taken on or before this date.
4. You can also restrict your search by size (such as > 1,000 KB) and file type (such as Movie Clip, *mpeg)
5. To be very specific in your search, you can also enter all or part of a filename.
6. Click **Next** to continue. In the next step, you'll encounter a listing of the files and folders that meet the search criteria from the previous step. Choose the specific files and / or folders to restore or simply check the topmost checkbox to restore the entire backup.
7. Click **Next** to move on to the last step. Choose either the **Default location** or **New location**. The default location is the original path of the files. If you choose **New** location, then also click the ellipsis button (...) to select a new folder location. You can also create a **New Folder**.
8. Optionally, you can indicate that you want to **Save new location as Default**, which will save the new folder location as the restoration path for this backup set.
9. Also, you can uncheck the box **Include original path**. This will cause the restore operation to place all of the files into a single folder, instead of preserving the original folder structure.
10. Click **Finish** to begin the restore operation.

11. When the restore is complete, a window will appear to display the results. You'll see a count of the successfully recovered files and also a count of any files that were unrecoverable. Click the **Details** button to view the restore report, or click the **Close** button to exit.

5.6 My Account and the Web Portal

On the right side of the **ImageStream** main window, you'll see the **My Account** section. There you will find several items of important information:

- **Used Space** – This is the amount of space that all of your backups presently consume in your SOS ServerSave account
- **Available Space** – This is the amount of space remaining in your SOS Server save account.
- **Expiration Date** – This is the date on which you should renew your SOS Server license.
- **Last Backup Date** – Displays the date of the very last backup sent to the cloud by ImageStream.

5.7 Options Menu

In the upper left corner of the **ImageStream** main window, you'll see the **Menu** drop-down list. Click the down arrow to display a list of options:

- **Classic View** – Select this menu choice to switch to the classic interface.
- **Options** – Choose this menu item to launch the **Options** window, which we describe in detail below.
- **Logout** – Choose this item to exit and logout of **ImageStream**.
- **About** – Select this item to view information about the version of **ImageStream** copy that you are running on your computer.

5.8 ImageStream Options

In the options **Menu** (upper left corner of the **ImageStream** main window), click the **Options** item to view the **Options** window. There you'll encounter a number of settings categories, each of which we describe below. When you're done configuring these settings, click the **Save** button to commit your changes and exit. Click **Cancel** to discard any changes.

5.8.1 Caching Options

ImageStream provides you with three types of cache performance options:

- **Use ImageStream Intellicache** – this is the default option, which optimizes for a balance between local cache size and backup speed.
- **Retransfer Entire File** – Choose this option to maintain the smallest local cache footprint, but realize that the backup speed will be slower.
- **Use Binary Compression** – All files will be stored in a local cache, which might be fine if you maintain sufficient disk space for this cache. Backups will run the fastest when you select this option.

5.8.2 Change Password

To change your password, click the **Change Password** item in the listing and then:

1. Enter your **Current password**.
2. Enter your **New password**.
3. Enter your new password once more in the **Confirm new password** text box.

5.8.3 Email Backup Reports

You can change the email address to which backup reports are sent. To do so, click the **Email Backup Reports** item in the listing and then enter the new address in the text box. You can also uncheck the box if you no longer want any reports to be sent at all.

5.8.4 Folders

ImageStream uses several local folders, each of which you may change to meet your local storage needs:

- **Recovery folder** – this folder will contain all files that you restore (see the *Recovering Files* section above).
- **Temp folder** – this is a temporary storage area for the ImageStream application.
- **Cache folder** – this is the cache folder (see the *Caching Options* subsection above).

- **Packages folder** – this folder contains any packages that will be sent up to the SOS ServerSave cloud.

5.9 Getting Help

Click the **Support** tab to view links to the **SOS ServerSave** support website. You can:

- Chat with a member of the support staff
- Access the knowledge base and FAQs (<http://kb.sosonlinebackup.com>)
- Submit a support ticket
- View tutorial videos

Chapter 6: Management Agent

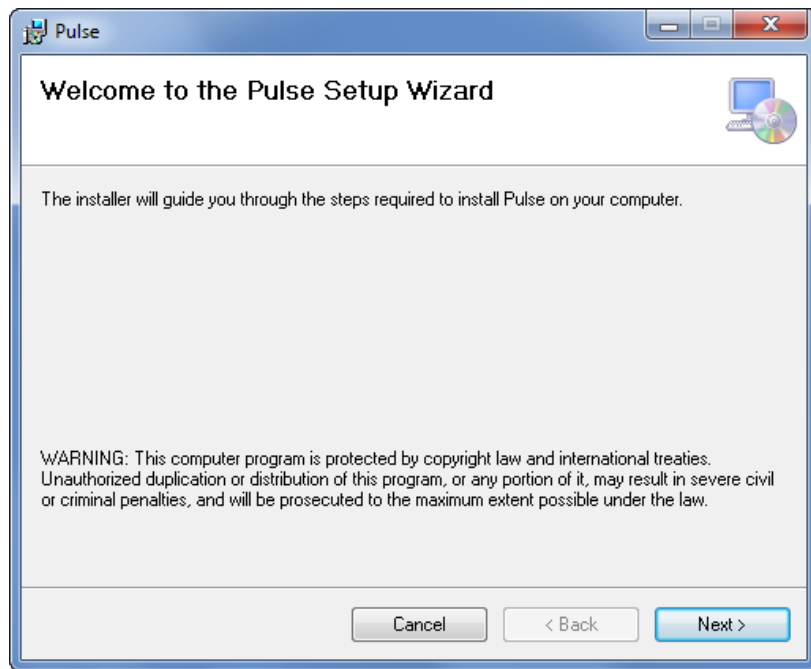
The chapter covers the installation, configuration and use of the **Management Agent Service** and web page. You need to install the management agent before you can use the **Central Admin Portal** on the **Partner Dashboard**. So, naturally, we begin with installation.

IMPORTANT: The **Management Agent** runs as a Windows™ service, which must be installed under an administrative account. So, in preparation, you should know the username and password for one of the administrator accounts on the computer where you will be installing the management agent. See your network administrator for additional help.

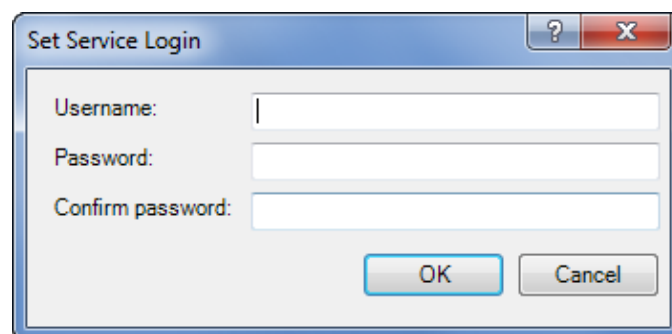
6.1 Installing the Management Agent

Follow these steps to install the **Management Agent** service:

1. First, you'll need to place the license file onto your computer. Below the **Management Agent** icon, click the link **License Details**.
2. In the small window that appears, you'll see a **Serial Number**—which is also the license key for your installation. On your keyboard, press and hold the CTRL key, and then press the C key to copy the **Serial Number** license key. Or, right-click over the **Serial Number** and select **Copy** from the menu.
3. Click the **Close** button to return to the **ServerSave Portal**.
4. Click the **Management Agent** icon and then, in the next window, click the **Download** button. You will see the progress of the download until it reaches the end and a message will appear indicating "Download Completed."
5. Click **OK** to return the **ServerSave Portal**, and then click the **Install App** button to launch the installation wizard (which may take several minutes to load):



6. Click the **Next** button to go on. Then, paste the serial number you copied before into the **Key** field.
7. In the next step, you might first check the amount of disk space by clicking the **Disk Cost** button. Then, optionally choose a different destination folder by clicking the **Browse** button, choosing a folder, and clicking **OK**. Click the **Next** button to move to the next step.
8. Click the **Back** and **Next** buttons to review the installation settings.
9. Click the **Next** button to launch the installation script. After a few moments, the **Set Service Login** window will appear:



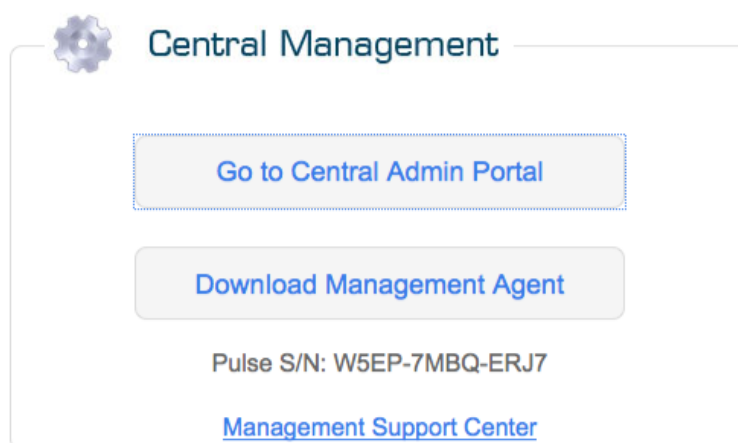
10. In this window, you will need to enter the **Username** and **Password**, for a local administrator account. Also re-enter that password in **Confirm** password field.

11. After a few moments, a window will appear to indicate that the installation is complete. Click the **Finish** button to launch the software.

6.2 Using the Central Admin Portal

After you install the Management Agent, you're ready to manage your accounts, users, backups, and client installations. Follow the steps below to access the portal and configure the settings.

1. Login with your **Username** and **Password**.
2. Locate the **Central Management** section of the Partner Dashboard.



3. Click the button **Go to Central Admin Portal**: <http://dashboard.sosonlinebackup.com/>
4. Once you're in the portal, you find a number of items that you can manage:
 - a. Users
 - b. Client Machines
 - c. Backup Accounts
 - d. Deployments
 - e. Events & Reports
 - f. Backup Policies

We cover each of these in the sections below.

6.2.2 Users

You can add new users and manage all users by following these simple steps:

To add a user

1. Find and click the **Add a User** link in the **Users** section of the portal.
2. In the **Add new entry** page, start by entering the **Username**.
3. Also enter the **Full Name**, **Company**, **Primary Email** and **Primary Phone**.
4. Optionally, enter the other fields.
5. Click **Insert** to commit and save this as a new **User** profile.

To manage users

1. Find and click the **Manage Users** link in the **Users** section of the portal.
2. In the **Add new entry** page, start by entering the **Username**.
3. Find the user profile that you want to edit, and click **Details**.
4. In the **Details** page, you view the user profile information. You can also click **View Backup Policies** or **View Client Commands** (see the relevant sections below in this chapter).
5. To return to the main portal page, locate and click the **Back to the home page** at the top of the page.

6.2.3 Client Machines

If any of your client machines have a management agent running, you can see the first five machines in the **Client Machines** section. You can view the **Details** of the machines shown in the listing, or click **More Client Machines** to see the complete listing. Follow these simple steps to review the machines:

1. Click the **More Client Machines**.
2. Click **Details** for the machine that you want to review.
3. On the **Details** page, in addition to backup specifications for that machine, you can view **Client Deployments**, **Client Logs**, **ClientMachineDetails** and **Backup Sessions**.
4. Click **Show All Items** to return to the listing.
5. To exit from any page, click the **Back to home page** link at the top.

6.2.4 Backup Accounts

You can review all of your accounts in the **Backup Accounts** section. You can view the **Details** of by clicking the link for any of accounts; or, click **More Accounts** to see the complete listing. Follow these simple steps to review the accounts:

1. Click the **More Accounts**.
2. Click **Details** for the account that you want to review.
3. On the **Details** page, in addition to general account information, you can view **Client Deployments, Events and Backup Sessions**.
4. Click **Show All Items** to return to the listing.
5. To exit from any page, click the **Back to home page** link at the top.

6.2.5 Deployments

You can review all of your deployments in the **Deployments** section. You can view the **Details** of by clicking the link for any of deployments; or, click **More Deployments** to see the complete listing. Follow these simple steps to review the deployments:

1. Click the **More Deployments**.
2. Click **Details** for the deployment that you want to review.
3. On the **Details** page, in addition to general deployment information, you can view **Test Policies, Client Commands, and Events**.
4. Click **Show All Items** to return to the listing.
5. To exit from any page, click the **Back to home page** link at the top.

You can also change the backup policy for a deployment. Read more about backup policies below. To change the policy for a deployment, follow these simple steps:

1. Click the **More Deployments**.
2. Click **Edit** next to the deployment for which you want change the backup policy.
3. The **Edit Object** page will appear quite similar to the Details page (above).
4. Locate the **Backup Policy Applied** setting, click the drop-down menu, and select the policy that you want to apply.

5. Click **Update** to apply the new backup policy to this deployment. (Click **Cancel** to exit without saving.)
6. Click **Show All Items** to return to the listing.
7. To exit from any page, click the **Back to home page** link at the top.

6.2.6 Events & Reports

In this section, you'll find links to review **Backup Sessions**, **Events**, and **Event Types**. The method for accessing each of these is quite similar to those for the other sections of the portal. Follow these simple steps:

1. Click the link (**Backup Sessions**, **Events**, or **Event Types**).
2. Click **Details** for item that you want to review.
3. Review the information on the **Details** page.
4. Click **Show All Items** to return to the listing.
5. To exit from any page, click the **Back to home page** link at the top

6.2.7 Backup Policies

With this feature, you can manage backup policies and create a new policy. There are many configurable properties of a backup policy, so we first describe how to create a backup policy.

Creating a Backup Policy

To create a backup policy, follow these steps:

1. Click the **Create New Policy**.
2. In the **Add new entry** page, take a moment to review all of the attributes.
3. First, click the **Policy Active** checkbox. Later, you can edit this policy and uncheck the box if you want to temporarily disable the policy.
4. Specify the **Activation Date** on which you want the policy to take effect.
5. Specify the **Created** date (today).
6. Enter a **Description** for this policy.

7. In the **Backup Set** field, enter folders and files that you want to include in the backup set. You need to list folders in a separate section, and files in another, according to this convention:

```
[FOLDERS]
C:\Users\sos\desktop\sample

[FILES]
C:\Users\sos\desktop\pulsesetupvs_1.2.1
```

8. Choose a **Backup Interval**, **Backup Time**, and the **Pulse Admin Account**.
9. Click **Insert** to add the backup policy and return the main page. (You may click **Cancel** to exit without saving.)
10. To exit from any page, click the **Back to home page** link at the top.

Manage Backup Policies

You can also manage backup policies by reviewing, editing, or deleting them. To manage backup policies, and perhaps apply a backup policy that you recently added, follow these steps:

1. Click the **Manage Backup Policies**.
2. For each policy in the listing, you may **Edit**, **Delete**, or simply review the **Details**.
3. At the top of the page, you can also filter on **Policy Active**, **Backup Interval**, **Backup Time**, or **Pulse Admin Account**. Simply choose the filter settings from the drop-down menus.
4. To review a policy, click **Details**. You can review the details and also view **Client Deployments** and **Backup User Accounts** for this policy.
5. To change a backup policy, click **Edit** and then follow the guidance given in the section above. When you're happy with the changes, click the **Update** button to commit them.
6. Click **Delete** to remove a backup policy. In the **Delete Policy** page, click the **Delete** link, and then click **OK** to confirm that you want to delete the policy.
7. Click **Show All Items** to return to the listing.
8. To exit from any page, click the **Back to home page** link at the top.

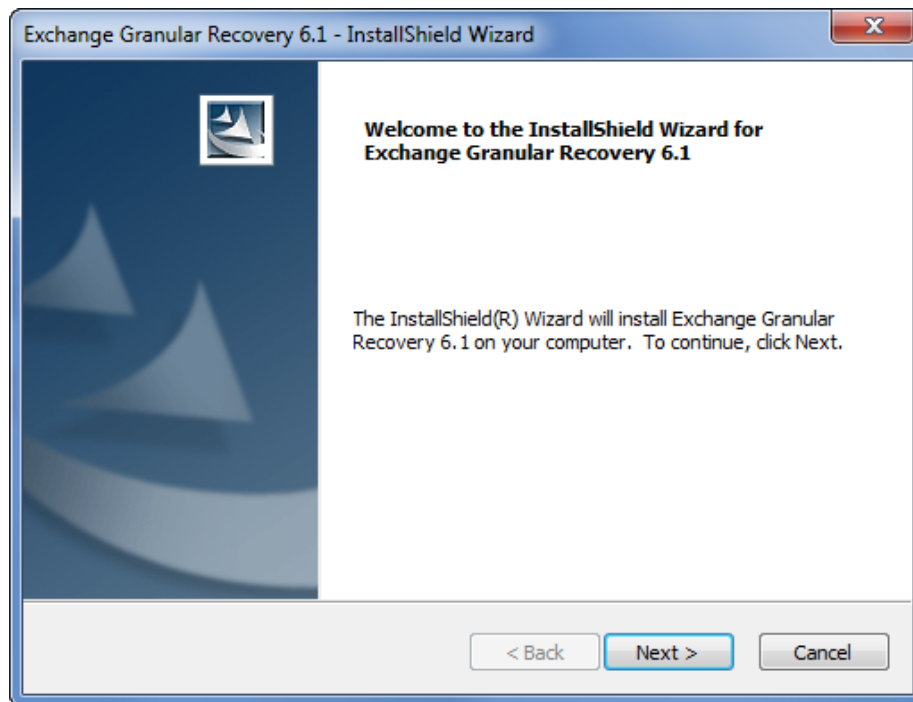
Chapter 7: Exchange Granular Recovery (EGR)

The chapter covers the installation, configuration and use of the **Exchange Granular Recovery (EGR)**. Naturally, we begin with installation.

7.1 Installing EGR

Important: You must install **ImageStream** prior to the installation of EGR.

1. First, you'll need to place the license file onto your computer. Below the **Exchange Granular Recovery** icon, click the link **License Details**.
2. In the small window that appears, click the link **Save your license to the file**.
3. In the file window that appears, choose a folder (or click **New folder** to create a new folder), enter an easy-to-remember **File** name, and click the **Save** button to return to the ServerSave Portal.
4. Click the **Exchange Granular Recovery** icon and then, in the next window, click the **Download** button. You will see the progress of the download until it reaches the end and a message will appear indicating "Download Completed."
5. Click **OK** to return the ServerSave Portal, and then click the **Install App** button to launch the installation wizard (which may take several minutes to load):



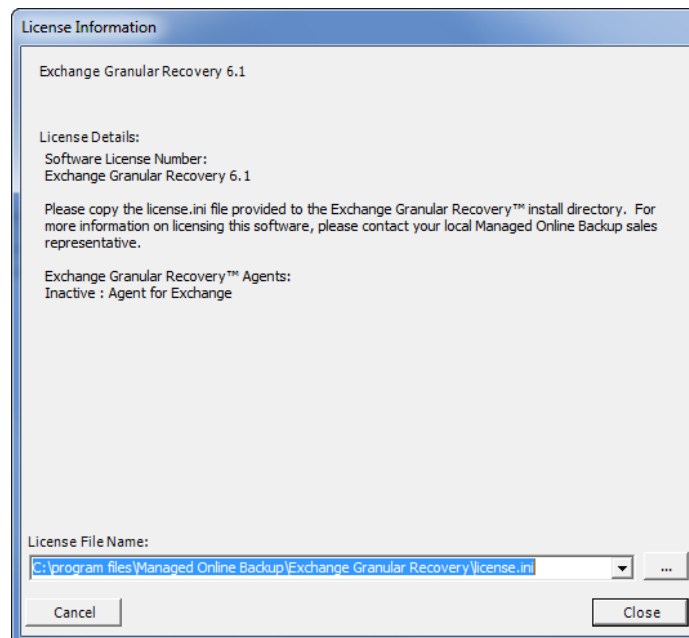
6. Click the **Next** button to continue, and then click **Yes** accept the terms in the license agreement and click **Next** once more.
7. In the next step, enter the **User Name** and also a **Company Name**. If you only want this software to be available for this operating system user account, then choose the radio button option **Only for me**; otherwise leave the default.
8. When you are sure of these changes, click the **Next** button to move onto the next step in the wizard.
9. In the next step, you may optionally choose a different destination folder by clicking the **Browse** button, choosing a folder, and clicking **OK**.
10. Click the **Back** and **Next** buttons to review the installation settings.
11. Click the **Next** button to launch the installation script.
12. After a few moments, a window will appear to indicate that the installation is complete. Click the **Finish** button to launch the software.
13. You will now need to install **Microsoft Exchange Server MAPI Client Collaboration Data Objects 12.1**, which you may find here:

<http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=1004>

14. Now, you'll need to activate the software by finding linking the license key file (see above). Return to the **ServerSave Portal** and click the **Exchange Granular Recovery** icon. The main

window will open, and also a second smaller window will appear to indicate that the license file has not been installed.

15. If you know the location of the license file on your computer, then click the **License Info** button, to display this dialog window:



16. Click the button with the ellipsis (...), locate the license file, and then click the **Close** button.

 **IMPORTANT:** See the *Exchange Granular Recovery User Guide* to learn how to use this application to perform backups.

Chapter 8: Online Backup & Recovery

The chapter covers the installation, configuration and use of the Online Backup & Recovery. Naturally, we begin with installation.

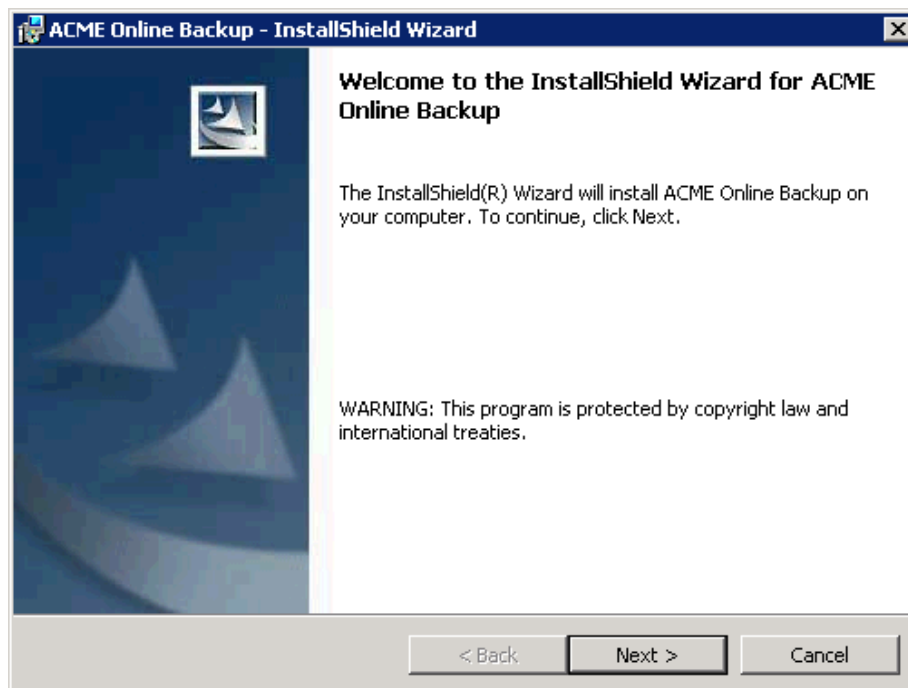
8.1 Installing Online Backup & Recovery



IMPORTANT:

- **Online Backup** and **ImageStream** cannot be installed together.
- You might need to disable all anti-virus and anti-spyware applications prior to installation.

1. Click the **Online Backup & Recovery** icon and then, in the next window, click the **Download** button. You will see the progress of the download until it reaches the end and a message will appear indicating “Download Completed.”
2. Click **OK** to return the ServerSave Portal, and then click the **Install App** button to launch the installation wizard:



3. Click the **Next** button to continue, and then choose the option to **accept the terms in the license agreement** and click **Next** once more.
4. In the next step of the wizard, you can choose a different destination folder by clicking the **Change** button. Otherwise, accept the default path by clicking the **Next** button.
5. In the next (and last) panel of the wizard, consider if you need to click the **Back** button and review the installation settings. Otherwise, click **Install** to launch the installation script.
6. After a few moments, a window will appear to indicate that the installation is complete. Click the **Finish** button to launch the software. You will encounter this dialog window:



7. Decide if you want to change any **Network Settings** and, optionally, check the boxes **Remember my login on this computer** and **Log me in automatically**. Then, enter your **SOS ServerSave Login** username and **Password** and click the **Login** button. After a moment, the application main window will appear, signaling that your installation is complete.



8.2 Using Online Backup

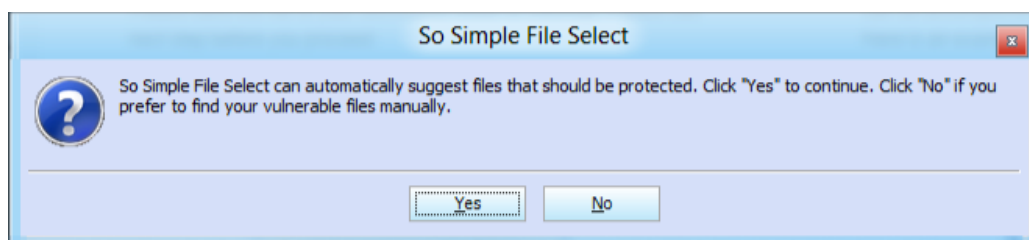


IMPORTANT: Before configuring your first backup, see the SOS Online Backup Knowledge Base article, *How to Modify Cache Settings*, which you can find here:

<http://kb.sosonlinebackup.com/article/AA-00532/0/How-to-modify-Cache-Settings.html>

Once the installation is complete, you can immediately configure and perform your first online backup. Follow these simple steps:

1. Find the **SOS Online Backup** item in your **Windows Start Menu**. A window will appear that containing several icons.
2. To schedule an online backup, click the **Backup Online** button. You be given a prompt asking if you would like the **So Simple** tool to automatically suggest which files you should protect.



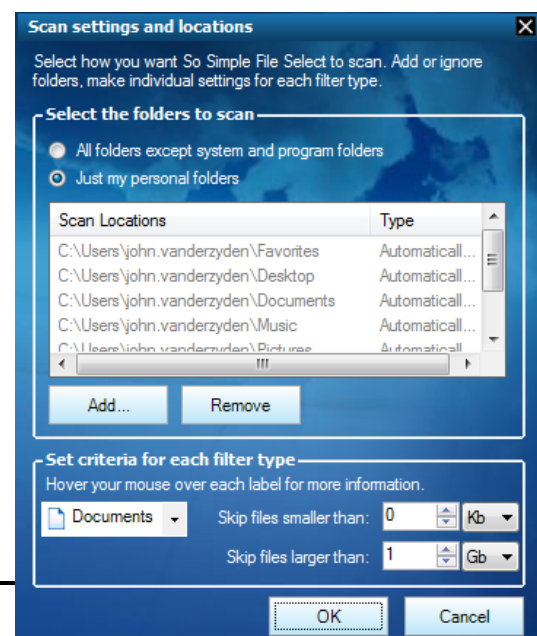
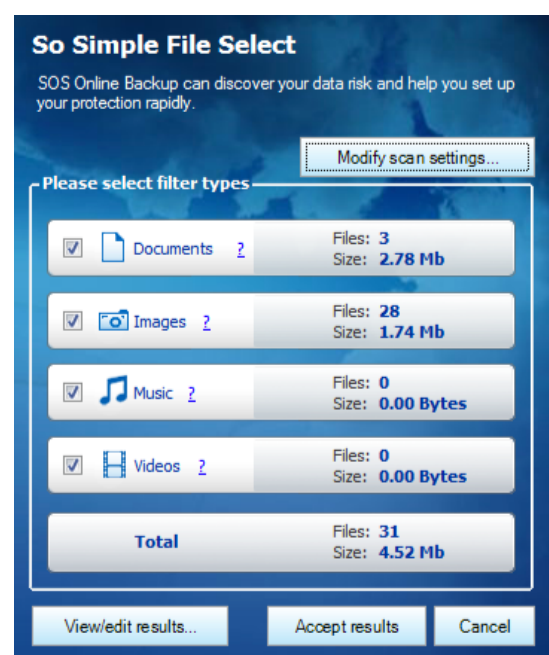
3. Click **No** if you want to choose the files yourself, and skip down to the subsection **Manual File Selection**.
4. If you click **Yes**, then continue reading in the section below, **Automatic File Selection**.

8.2.1 Automatic File Selection (So Simple File Select)

If you opt for automatic file selection, a window will appear to present you with a listing of backup recommendations.

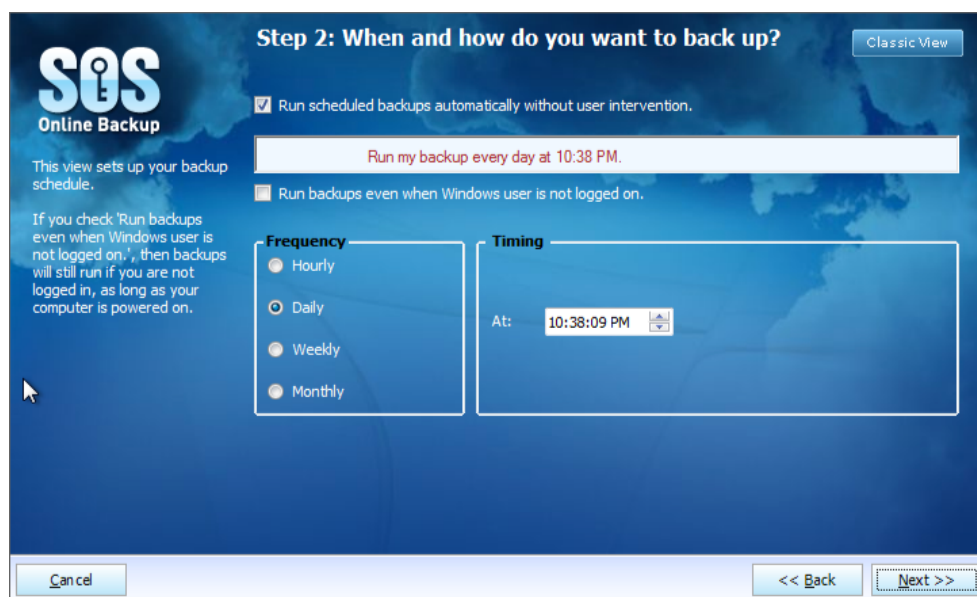
Follow these steps to configure an automatic file backup:

1. Four file categories are shown:
Documents, Images, Music, and Videos.
These files are found in your personal folders, and the scan results display the number of **Files**, file **Size** for each, as well as at **Total**.
2. You can exclude entire file categories by unchecking the box next to one or more categories.
3. You can edit the results by clicking the **View/edit results** button and then unchecking any of the files that you don't want to include.
4. Click **OK** to close the results window.
5. If you want to modify the scan, click the **Modify scan settings** button to display the settings window. The default folder setting is **Just my personal folders**, but you can choose to backup **All folders except system and program folders** (which will capture all additional files that have been added apart from those that run the operating system and applications).
6. You can also click on an item in the **Scan Locations** listing and then click the **Ignore**



button to remove that folder from the backup scan.

7. Alternatively, you can click the **Add** button to add a specific location to the scan.
8. At the bottom of the **Scan Settings** window, you can **Set criteria for each filter type**. In the documents drop-down menu, choose one of several file types: **Documents**, **Images**, **Music**, or **Videos**. For each type, choose the size for **Skip files smaller than** and **Skip files larger than**.
9. If you are happy with all of the settings, click the **OK** button to close the **Scan Settings** window, and then click **Accept Results** button, and then confirm your choice in the prompt window by clicking **Yes**.



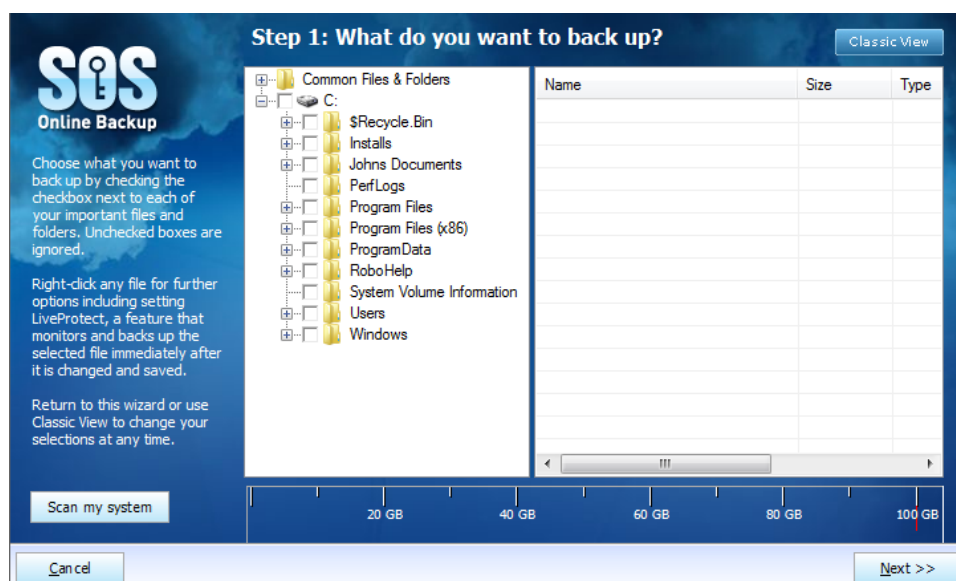
10. Here you may configure the time of day and the frequency at which the backups will occur.
11. Uncheck **Backup automatically without user intervention** if you would rather receive a prompt before the backup begins. If you leave a check in this box, the backup will run in the background at the time you schedule.
12. Check the box **Backup even when Windows user is not logged on** if you would like the backup to run when the computer is running without an active user login.
13. Notice the **Frequency** and **Timing** sections. The default **Frequency** is **Daily**, and the **Timing** is set to the time at which you opened the backup tool. You can change the **Timing** by editing the hour, minutes and AM/PM setting.
14. If you prefer, you can change the frequency to **Hourly** and then select the number of **Hours** indicating how often you want the backup to occur. It's important to realize that large, frequent backup sets may slow the computer down.

15. You can configure full automation for this backup by having the backup run even if you are not logged in to the computer. To do so, simply check the box for **Run backups even when Windows user is not logged on**. The backup will start at the time you specify, if the computer is running, and even if your local computer account is logged off.
16. Lastly in this step, consider if you would rather receive a prompt to start the backup. If so, then uncheck the box next to **Run scheduled backups automatically without user intervention**. Doing so will disable all of the options and you will need to start the backup manually each day at the time shown in the **Timing** box.
17. Click **Next** to move to the next step where, optionally, you can check the box **Send email reports at the end of backup** to send a backup status report to the email address that you specify the text box immediately below.
18. Click **Next** again to go on to the final step, where you can review the backup configuration. If you don't want to execute the backup immediately, then uncheck the Run backup now checkbox.
19. Click **Finish** to complete the setup. If you choose to start the backup, you should see a status message appear on your desktop to indicate that the backup has begun. Otherwise, your backup will run at the time you specified.

8.2.2 Manual File Selection

If you decide to select backup files yourself, you'll see that it only requires a few additional steps. You choose files and folders, decide upon a schedule, and optionally choose to receive email reports. Follow these steps to *manually* configure an online backup:

1. After choosing **No** at the **So Simple** prompt (see above), you'll encounter this window:



2. The left panel is a folder/file tree. To expand folders, click the **+** to the left of the folder; then click the folder to display the files in the right-hand window.
3. Place a check next to each folder and each file that you want to include in the backup.

Important: You may decide, after further consideration, that you would rather that the backup tool make the file choices for you. If so, then click the **Scan my system** button and follow the guidance in the section **Manual File Selection** above.

4. Click **Next** to move on the scheduling step, where you will encounter this window:

The screenshot shows the 'Step 2: When and how do you want to back up?' window of the SOS Online Backup application. The window has a blue background with a cloud pattern. On the left, there is a sidebar with the SOS Online Backup logo and some explanatory text. The main area contains several settings:

- A checkbox labeled 'Run scheduled backups automatically without user intervention.' which is checked. Below it, a text box says 'Run my backup every day at 10:38 PM.'
- A checkbox labeled 'Run backups even when Windows user is not logged on.' which is unchecked.
- A 'Frequency' section with four radio buttons: 'Hourly', 'Daily' (selected), 'Weekly', and 'Monthly'.
- A 'Timing' section with a label 'At:' followed by a time picker set to '10:38:09 PM'.

At the bottom of the window, there are three buttons: 'Cancel', '<< Back', and 'Next >>'.

5. Here you may configure the time of day and the frequency at which the backups will occur.
6. Uncheck **Backup automatically without user intervention** if you would rather receive a prompt before the backup begins. If you leave a check in this box, the backup will run in the background at the time you schedule.
7. Check the box **Backup even when Windows user is not logged on** if you would like the backup to run when the computer is running without an active user login.
8. Notice the **Frequency** and **Timing** sections. The default **Frequency** is **Daily**, and the **Timing** is set to the time at which you opened the backup tool. You can change the **Timing** by editing the hour, minutes and AM/PM setting.

9. If you prefer, you can change the frequency to **Hourly** and then select the number of **Hours** indicating how often you want the backup to occur. It's important to realize that large, frequent backup sets may slow the computer down.
10. You can configure full automation for this backup by having the backup run even if you are not logged in to the computer. To do so, simply check the box for **Run backups even when Windows user is not logged on**. The backup will start at the time you specify, if the computer is running, and even if your local computer account is logged off.
11. Lastly in this step, consider if you would rather receive a prompt to start the backup. If so, then uncheck the box next to **Run scheduled backups automatically without user intervention**. Doing so will disable all of the options and you will need to start the backup manually each day at the time shown in the **Timing** box.
13. Click **Next** to move to the next step where, optionally, you can check the box **Send email reports at the end of backup** to send a backup status report to the email address that you specify in the text box immediately below.
14. Click **Next** again to go on to the final step, where you can review the backup configuration. If you don't want to execute the backup immediately, then uncheck the **Run backup now** checkbox.
12. Click **Finish** to complete the setup. If you choose to start the backup, you should see a status message appear on your desktop to indicate that the backup has begun. Otherwise, your backup will run at the time you specified.

8.3 Using Online Restore

With Online Restore, you can recover and replace a file from a previous backup. If you have at least one backup set, then you can restore one or more files from that backup set. Follow these simple steps:

1. Find the **SOS Online Backup** item in your **Windows Start Menu**. A window will appear that contains several icons.
2. To restore from a previous backup, click the **Restore Online** button to display this window:

SOS Online Backup

Step 1: Search for backups to recover from Classic View

On this calendar, please click a date. Only backups that were run before and up to this date will be included in your search results.

Search by any or all of the criteria provided. The calendar displays in bold all dates on which backups were performed.

February, 2012						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	1	2	3
4	5	6	7	8	9	10

Today: 2/22/2012

What size is it (KB)?

What type is it?
 All Files and Folders (*.*)

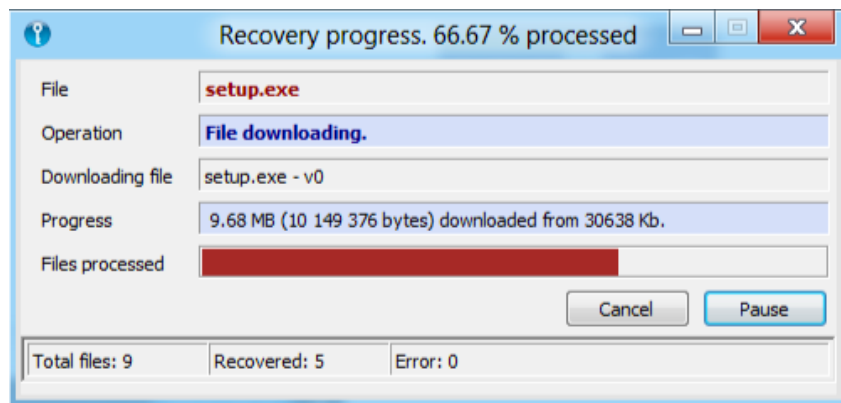
All or part of the filename

[Refresh recovery data](#)

When you click 'Next', you will see all the files you have backed up that are of **any size**, of **any file type** and have **any filename**.

Cancel Next >>

3. This tool will search for one or more files to recover. So, you must first choose a date. The search will look for backup sets on or before this date. You can also apply filters.
4. For example, you might be looking for an MPEG-4 Audio media file that you know to be greater than 250 MB in size. In this case you would select > 250000 KB for **What size is it?**, and select **MPEG-4 Audio (*.M4A)** for What type is it?
5. You may also specify **All or part of the filename** (e.g., entering "Present*" in this field would cause the search to look only for files beginning with "Present").
6. Click **Next**. You may receive an alert indicating that no matches were found. Change the date or the filters and try again. To clear the filters entirely, you can remove the size value and choose **All Files and Folders** from the **What type is it?** drop-down menu.
7. When the search is successful, you will encounter the **Select backup window**—which displays one or more files. Click the checkbox next to the files and folders that you want to restore, and click **Next**.
8. **Set your recovery location** step is the last step in the restore tool. You can accept the default location, or select **New location** and then click the ellipsis button (...) to choose a folder into which you want to place the files.
9. If you don't care to retain the original folder hierarchy, uncheck the **Include original path** box. Then click **Finish**.
10. After a moment, the restore process will begin. The process may take many minutes if you are restoring a large number of files. You will see updates in the **Progress** and **Files** processed fields of the **Recovery Progress** window. Finally, you will see an alert that the recovery process is complete. Click **Close** to exit this window and return to the **SOS Online Backup** window.



[END OF USER GUIDE]