

User Guide

# CloudAlly Box User Guide



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# Preface

## Welcome

### About this Guide

Thanks for selecting CloudAlly Backup for Box. CloudAlly ensure that your organization's data is well protected and always available for swift restore to keep your business operational and your employees productive. We empower end users to correct their own mistakes, and give application administrators, IT leadership and audit teams the confidence and proof that your data is appropriately backed up, safe and ready for recovery. CloudAlly strives to build real relationships with our customers and deliver exceptional service.

We hope this User Guide will help your organization to utilize cloud advancements, aimed at preventing critical business data loss. Our mission is to develop & support advanced software, and to provide better service to our customers. If you ever have a question or need additional help, please contact us at [support@cloudally.com](mailto:support@cloudally.com) or search our Knowledge Base at <https://support.cloudally.com>.

## Audience

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

## What's in this Guide

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

## Configuration

### Prerequisites

To administer the CloudAlly Backup for Box environment, the following are required:

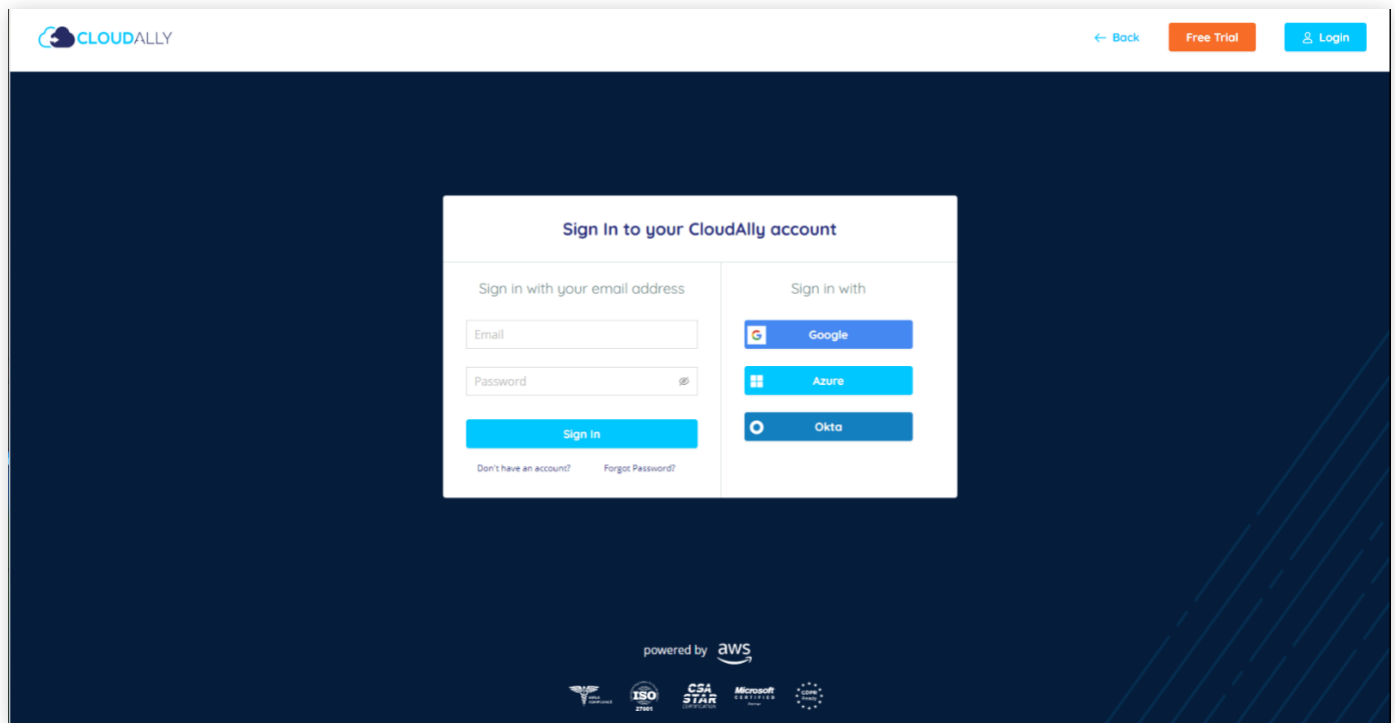
- Box Subscription
- Box Admin account (the co-admin accounts are not suitable for the backup)

# Create and Access Your CloudAlly™ Account

## Sign Up/Sign In from the CloudAlly Home Page

In your Internet browser open [www.cloudally.com](https://www.cloudally.com) and click **Log In** link.

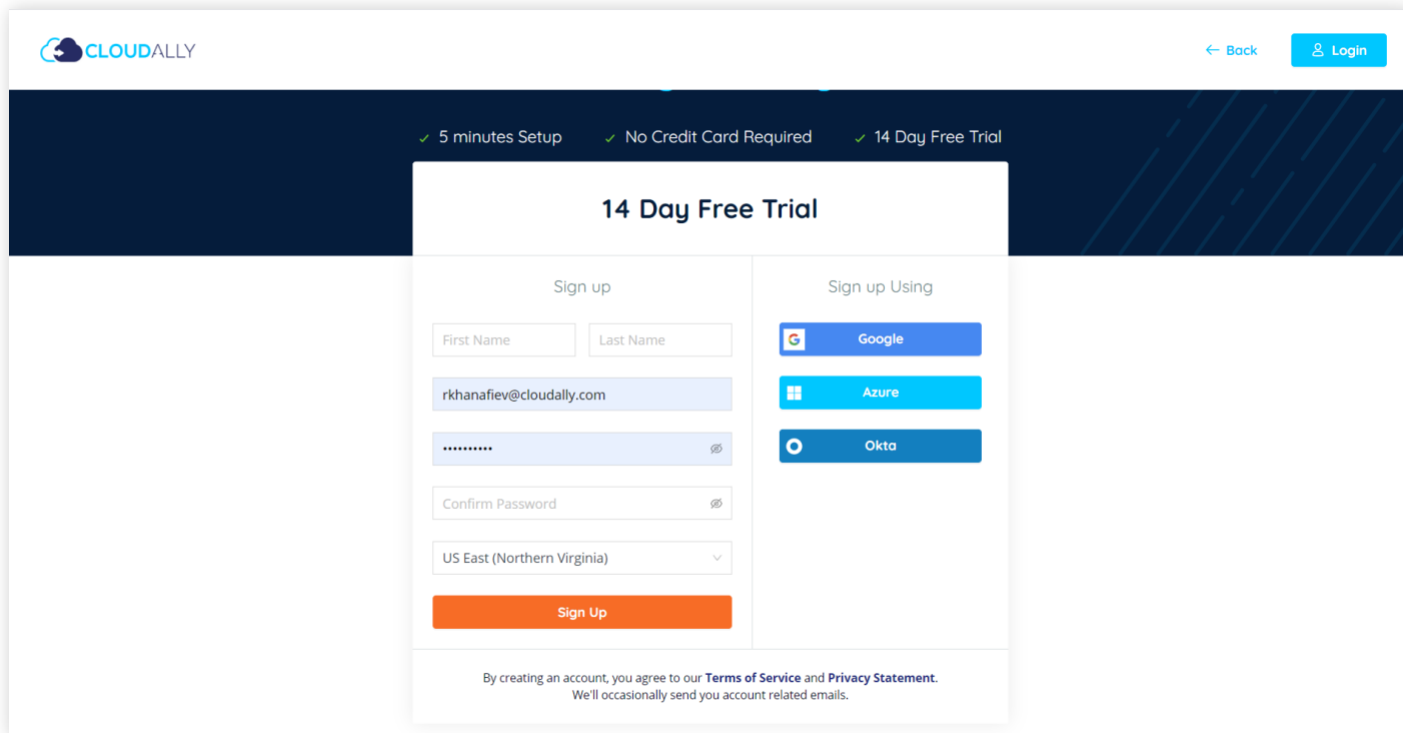
The *Sign In* page is displayed.



The screenshot shows the CloudAlly Sign In page. At the top left is the CloudAlly logo. At the top right are links for 'Back', 'Free Trial', and 'Login'. The main content area has a dark blue background with a white sign-in form in the center. The form is titled 'Sign In to your CloudAlly account'. It has two columns. The left column is for signing in with an email address, featuring input fields for 'Email' and 'Password', a 'Sign in' button, and links for 'Don't have an account?' and 'Forgot Password?'. The right column is for signing in with social or enterprise providers, featuring buttons for 'Google', 'Azure', and 'Okta'. At the bottom of the page, there is a 'powered by AWS' logo and several certification logos including ISO 27001, CSA STAR, Microsoft Certified, and others.

Click Don't have an account link.

The *Sign Up* page is displayed.



The screenshot shows the CloudAlly Sign Up page. At the top, there's a navigation bar with the CloudAlly logo on the left, a 'Back' link, and a 'Login' button. Below the navigation bar, a dark blue banner contains three green checkmarks and text: '5 minutes Setup', 'No Credit Card Required', and '14 Day Free Trial'. The main content area is titled '14 Day Free Trial' and is divided into two columns. The left column is for 'Sign up' and contains fields for 'First Name', 'Last Name', 'Email' (pre-filled with 'rkhanafiev@cloudally.com'), 'Password', 'Confirm Password', and a 'Location' dropdown menu (pre-selected with 'US East (Northern Virginia)'). An orange 'Sign Up' button is at the bottom of this column. The right column is for 'Sign up Using' and features three social login buttons: 'Google', 'Azure', and 'Okta'. At the bottom of the form, a disclaimer states: 'By creating an account, you agree to our Terms of Service and Privacy Statement. We'll occasionally send you account related emails.'

Fill-in the form and click the **SIGN UP** button.

**Note:** In addition to the primary AWS data centers available in the dropdown menu "Location", we also offer a "Bring Your Own Storage" (BYOS) option on request. This allows you to store backups in your own AWS S3 buckets, S3 compatible storage service, Azure or Google Cloud Platform. Please contact [support@cloudally.com](mailto:support@cloudally.com) for more information.

Your trial account is created and an email containing your activation link is sent to your email address. But the email will be sent only for credential based authorization. Click on the activation link contained in the email you receive, to activate your account.

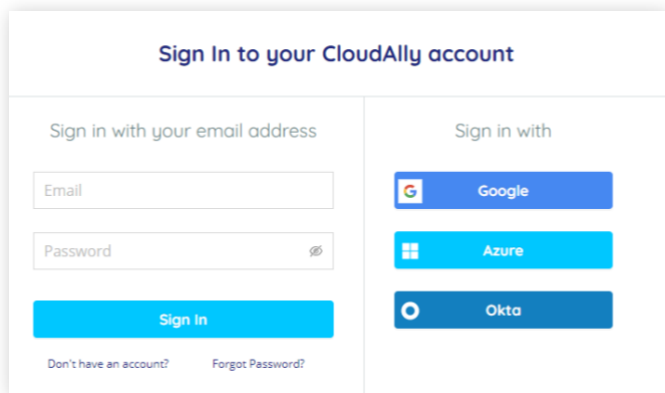
Once your account is activated, you are redirected to the CloudAlly login page. Enter your email address/password and click the **SIGN IN** button to login and access your CloudAlly account.

You can also enable Two-factor authentication to provide additional security. For more information, see the [Two-Factor Authentication](#) section.

# Reset your password

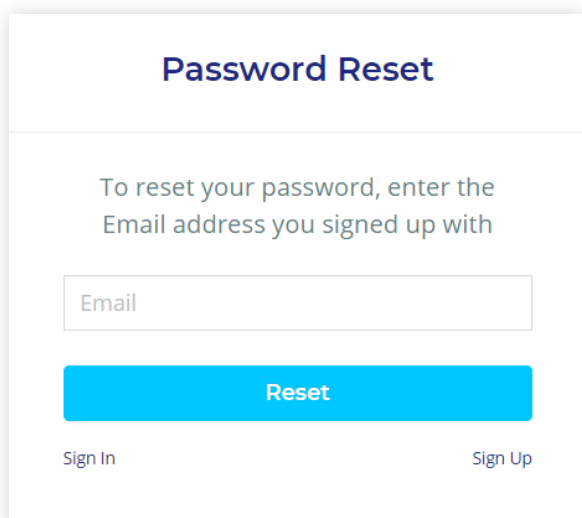
If you do not remember your password, you can easily reset it by the Password Reset function.

1. Click the link **Forgot Password?** to start the process of your password reset.



The form is titled "Sign In to your CloudAlly account". It is divided into two main sections. The left section, "Sign in with your email address", contains an "Email" input field, a "Password" input field with a toggle icon, a blue "Sign In" button, and links for "Don't have an account?" and "Forgot Password?". The right section, "Sign in with", features three social login buttons: "Google" (with the Google logo), "Azure" (with the Azure logo), and "Okta" (with the Okta logo).

The Password Reset page will appear



The form is titled "Password Reset". It contains a message: "To reset your password, enter the Email address you signed up with". Below this is an "Email" input field. A large blue "Reset" button is positioned below the input field. At the bottom of the form, there are two links: "Sign In" on the left and "Sign Up" on the right.

2. In the Email field enter the email address that you have used to sign up.
3. Click the button **Reset** and the window Password Reset will appear.  
If you don't want to reset your password, you can create a new account. Click **Sign Up** for creating a new account.

## Password Reset

To reset your password, enter the Email address you signed up with



Thank you. **An email has been sent to you.** Please follow the email instructions in order to complete your password reset.

An email will be sent to you. Check your email inbox, follow the email instructions and complete your password reset.

The *email instruction* is displayed.

Hi partner1@cloudrein.com,  
Account ID: [REDACTED]

A request to reset your password has been made by [REDACTED]

If you approve this request, please click the following link to complete the password reset: [Reset Password](#)

If you have not requested a password reset, please ignore this message.

Thank you,

CloudAlly support team

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

## Change Your Password

Your password has expired,  
please update it

Save

Cancel

4. Enter your new password in the fields **New Password** and **Confirm New Password** and Click the button **Save**. The button **Cancel** is not available.

After reset the password you go back the window *Sign In to your CloudAlly account*.

## Box Backup Task Settings

Box is a powerful file storage and collaboration platform but lacks the ability to recover files that have been accidentally or maliciously destroyed. Once the Trash Folder is purged, your data is gone forever. Our automated daily Box backup service ensures your folders and files are backed up daily to secure Amazon S3 storage and available for recovery from any point in time with a few simple clicks. We backup Box.com files & folders so you don't lose your important business data.

**Note:** An Admin account is required in order to backup all Box user accounts, including admins and co-admin accounts. Note that a co-admin accounts cannot gain access to admin and other co-admin accounts' data and can't be used to create backup tasks.

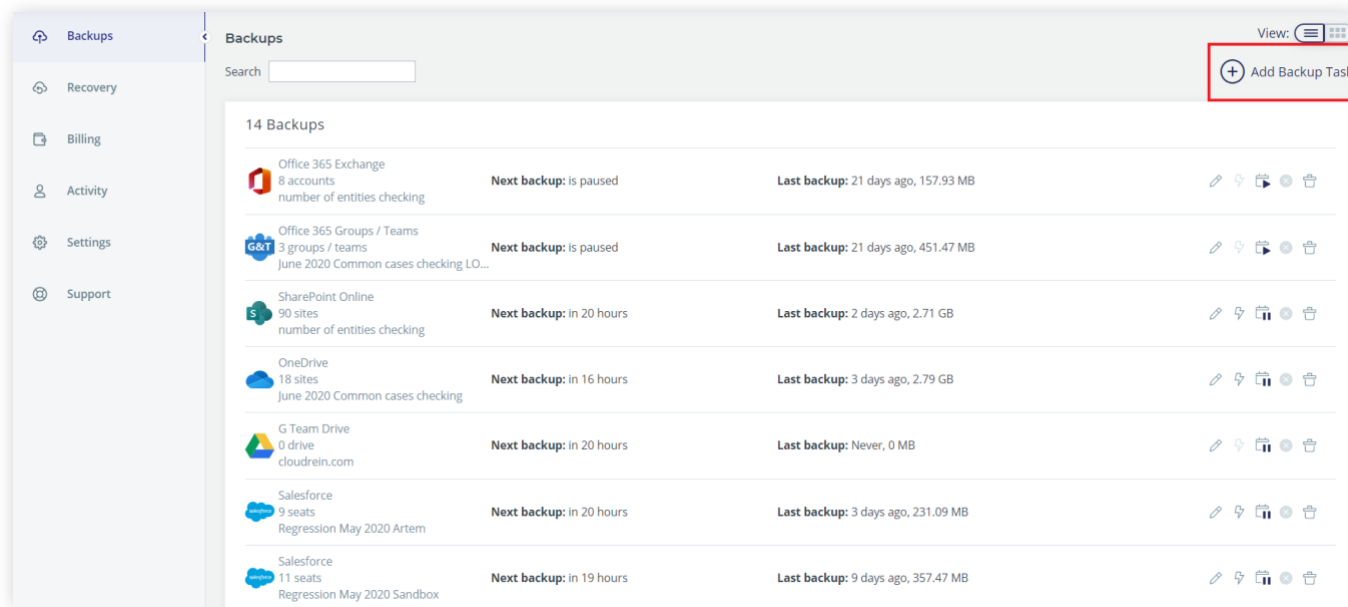
CloudAlly's Box backup includes files and folders. With a few simple clicks, you can activate backups for all or selected users.

# Activate New Box Backup Task

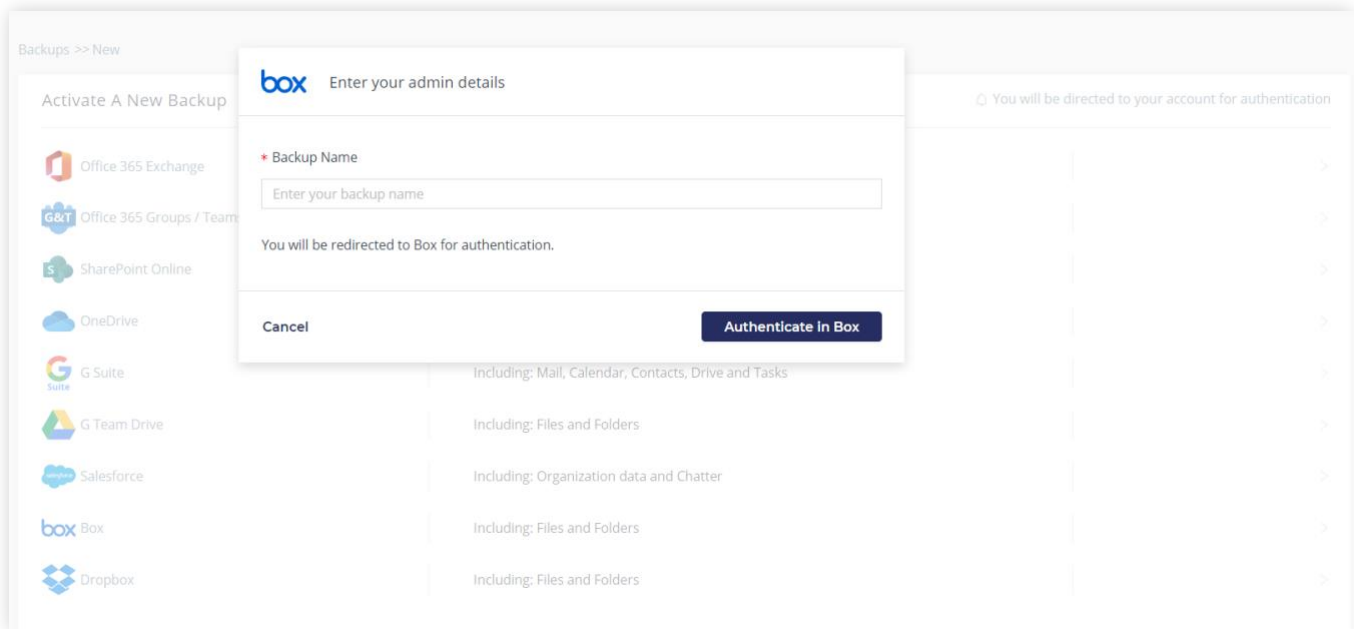
Activating a new backup process varies from account to account. This section details the process of creating new backup accounts for Box.

Perform the following procedure to create a backup account for Box:


1. Sign in to your CloudAlly account or click on the **Backups** menu item in the Navigation Panel if you are already signed in
2. Click on + Add Backup Task on the Backups page






- Click on the **Box** option. The Box Backup Task Settings screen appears:



- Fill-in the name of the backup task. This name is used in the notifications and reports and it can be changed later.
- Click **Authenticate** in Box button to begin the authorization process. You will be redirected to the Box authorization page. An Admin account is required in order to backup all Box user accounts including admins and co-admin accounts.
- Enter your Box credentials and login into your admin or co-admin account.
- Click on **Grant access to Box** to allow CloudAlly to backup your data.
- You will be redirected to the Backup Task page, where you can adjust the settings of the backup.


Test 


Backups >> Test


 Connected  


### Backup Settings


The automatic addition/deletion of an account, site, domain, table or drive can affect your monthly or annual billing amount


☒ Index all data for Search 

☒ Automatically activate new users 

☐ Retain auto-archived backups for  days before deleting 

Backup Datacenter 


Retention Period 


EU (Ireland) 

Unlimited

Backup Frequency

Backup Hour (UTC)

Daily 


22:00 

Cancel Save




In this page you can adjust the backup settings and activate backups for the Box users. Please see the sections below for the detailed procedures.

## Backup Settings

This set of options enable you to preset the backup options for the selected account.


Test  **1**


Backups >> Test


 Connected  


### Backup Settings


The automatic addition/deletion of an account, site, domain, table or drive can affect your monthly or annual billing amount


☒ Index all data for Search  **3**

☒ Automatically activate new users  **4**

☐ Retain auto-archived backups for  days before deleting  **5**

Backup Datacenter 


Retention Period 


EU (Ireland) 

Unlimited


Backup Frequency

Backup Hour (UTC)

Daily 

22:00 

Cancel Save

1. You can change the name of the backup task by clicking the  button next to it.
2. The indicator to the right of the Box logo displays whether the CloudAlly application was able to connect to the specified Box account. In case the authentication token granted for the CloudAlly application becomes invalid (e.g. it expires due to inactivity, if you put the backup task on pause for a long time), the green **Connected** indicator changes to the red **Disconnected**. In order to grant our application a new token you can click on the indicator to open the authentication dialog and repeat the authentication.

**Note:** CloudAlly's authorization process can use SSO and requires an Admin account.

3. In order to provide the granular search and restore functions, the data is unencrypted temporarily to build the search index. Once the index is built, both the data and the index are encrypted. By default, **Index all data for Search** check box is checked and your archives will be indexed for use in the granular search and restore function. If you want to uncheck the **Index all data for Search** you will need to contact [support@cloudally.com](mailto:support@cloudally.com). This will disable the granular search and restore function but you can still browse backups via date.
4. Select the check box adjacent to **Automatically detect and activate new users** field, if you want to automatically activate backup for new users added to the system in the future. If you do not select this option, you will need to manually activate the backups for the new users as they are added.
5. The checkbox **Retain auto-archived backups** allows you to specify whether you want to remove the auto-archived backups and for how long you want to keep them. Backups will be auto-archived when the account is deleted. Enter the number of days to retain the auto-archived account data or leave blank to retain it indefinitely. This will not affect manually paused backups.
6. The fields **Backup Datacenter** and **Retention Period** are “display only” and their values can't be changed here.

The **Backup Datacenter** field displays the Data Center location you have selected during your sign up with CloudAlly.

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

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

If you want to change these fields, please contact [support@cloudally.com](mailto:support@cloudally.com).

7. Click the drop-down list adjacent to **Backup hour (UTC)** field and select the backup hour.
8. Click the drop-down list adjacent to **Backup frequency** field and select the backup frequency. Also adding more frequent backups is possible via support request. Available options are the following:
  - Daily
  - Every 3 Days
  - Weekly
9. Click the **Save** button to save the backup details.

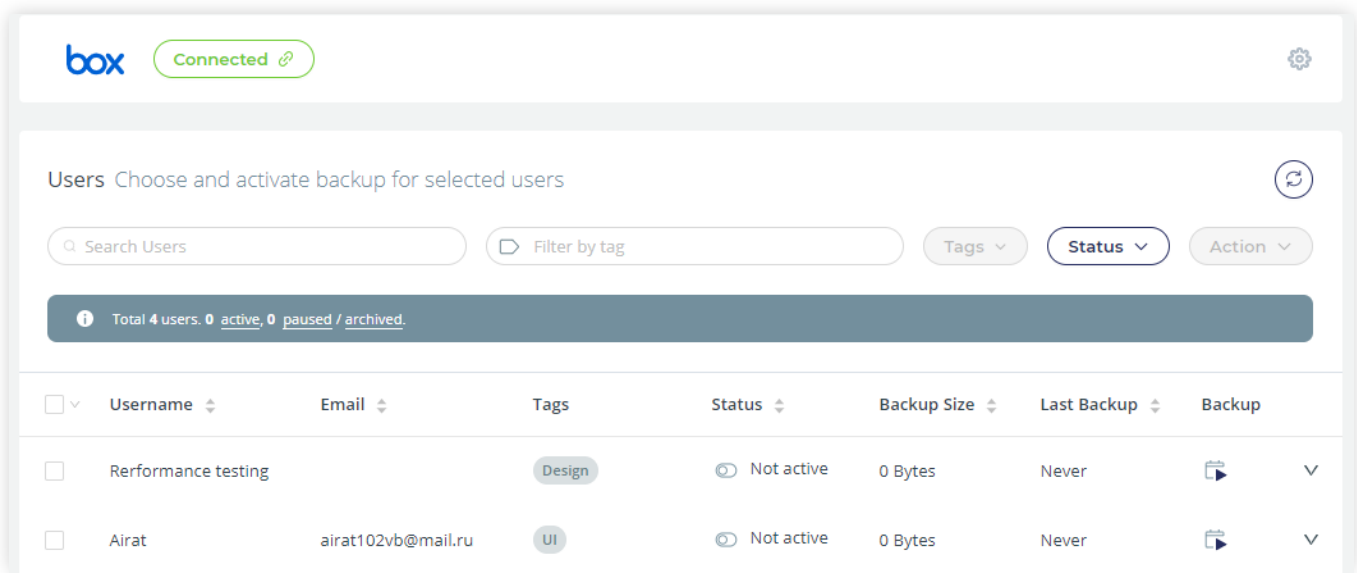
## Activate and Manage backups of User accounts

This section explains the process of managing your Box backup tasks.

If you are not in the Box backup task Settings page, then do the following:

1. Click the **Backups** menu item from the Navigation Panel.
2. The *Backup Tasks* page is displayed.
3. Click the **Box** icon from the list or enter a keyword in the **Search** field to find a specific task.
4. The Box backup task settings page is displayed.

Below the Backup Settings section you can find the Users' accounts management section.



The screenshot shows the 'Users' section of the Box backup task settings page. At the top, there's a 'box' logo and a 'Connected' status indicator. Below this, the heading 'Users' is followed by the instruction 'Choose and activate backup for selected users'. There are search and filter controls: 'Search Users', 'Filter by tag', 'Tags', 'Status', and 'Action'. A summary bar indicates 'Total 4 users. 0 active, 0 paused / archived.' Below this is a table with columns: Username, Email, Tags, Status, Backup Size, Last Backup, and Backup. Two users are listed: 'Performance testing' with tag 'Design' and 'Airat' with tag 'UI'. Both are 'Not active' with '0 Bytes' backup size and 'Never' last backup.

<input type="checkbox"/>	Username	Email	Tags	Status	Backup Size	Last Backup	Backup
<input type="checkbox"/>	Performance testing		Design	Not active	0 Bytes	Never	▼
<input type="checkbox"/>	Airat	airat102vb@mail.ru	UI	Not active	0 Bytes	Never	▼

The *Box backup task settings* page displays all the Box accounts available for the administrator account you are using. The page displays the details such as Username, Email, Status, Backup Size, Last Backup date, and provides the means to filter the accounts and control the associated backup tasks.

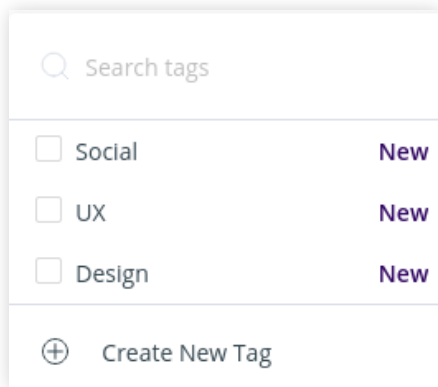
You can filter accounts using the following options:

- Enter a keyword in the **Search** field and click **Refresh** link to view all the accounts with the entered keyword.
- Filter accounts by statuses such as **All**, **Not active**, **Scheduled**, **Success**, **In Process**, **Failed**, **Pause**, **Archived**, etc.

You can also use tags to quickly filter the accounts.

The button **Tags** needs for searching existing tags. By default it is not active. To active the button **Tags** you need to select at least one account with the checkbox on the left of it.

Click the button **Tags** and the following screen will appear.



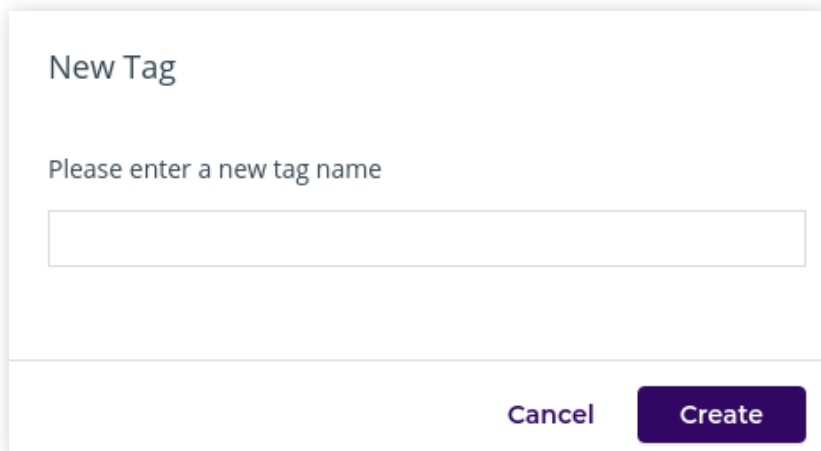
A dropdown menu titled 'Search tags' with a magnifying glass icon. It contains three items: 'Social' with a checkbox and the word 'New' in purple; 'UX' with a checkbox and the word 'New' in purple; and 'Design' with a checkbox and the word 'New' in purple. At the bottom is a button with a plus icon and the text 'Create New Tag'.

To search your existing tags you can enter a tag name in the field **Search tags**.

For creating new tags follow the instructions below:

1. Click **Create New Tag** to add a new tag.

The pop-up will appear where you can enter a new tag name



A pop-up form titled 'New Tag'. It contains a text input field with the placeholder text 'Please enter a new tag name'. At the bottom right are two buttons: 'Cancel' and 'Create'.

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

To apply tags for your accounts, select at least one account with the checkbox on the left of it.

1. Click the button **Tag**.
2. Choose needed tag for your accounts.
3. Click the button **Apply**.

In the field **Filter by tag** you can enter a tag name and filter your account by tags.


To filter your accounts by tags you need to choose the needed tags in the field **Filter by tag**.

And then you can see your filtered accounts.

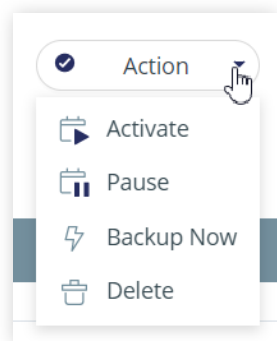
**Users** Choose and activate backup for selected users 🔄

🔍 Search Users 🗑 UI x Tags ▾ Status ▾ Action ▾

📌 Displaying 1 user out of 4. Clear filters ✕

<input type="checkbox"/> ▾	Username ▾	Email ▾	Tags	Status ▾	Backup Size ▾	Last Backup ▾	Backup
<input type="checkbox"/>	Airat	rat102vb@mail.ru	UI	🔒 Not active	0 Bytes	Never	 ▾

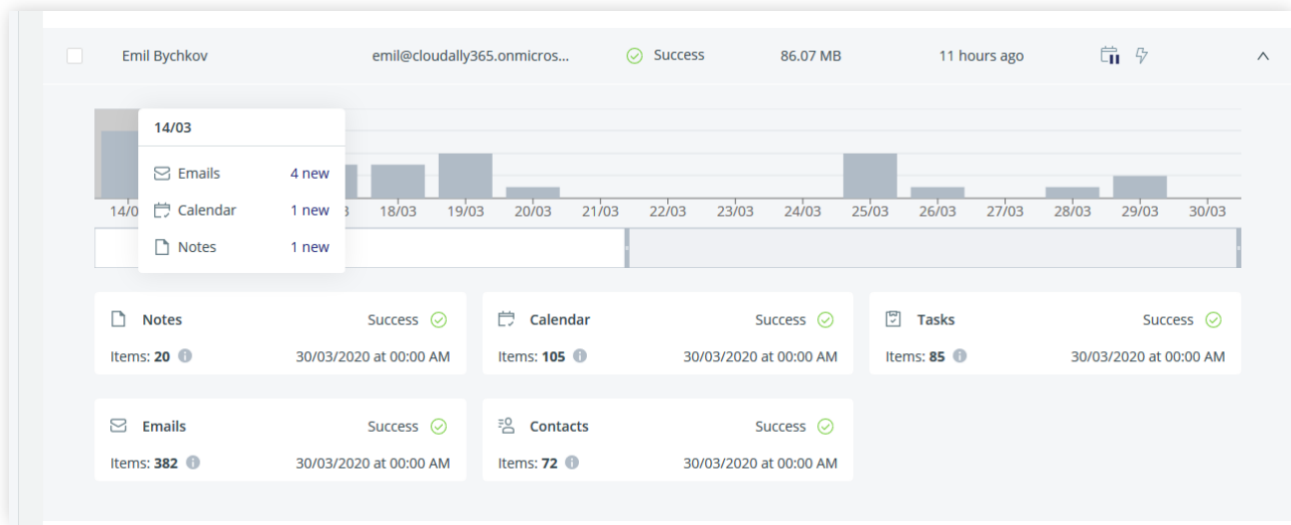
For making actions on the users. You need once to select at least one account with the checkbox on the left of it, you can also perform the following from the **Action** drop-down menu:



- Click the **Activate** link to enable backup in all the selected accounts
- **Pause** – to pause the backup procedures on the selected accounts
- **Backup now** – to schedule the backup immediately. The backup in this case starts as soon as a backup processing machine is available (may take several minutes)
- **Delete** – remove the backup task and backup data for the selected accounts. The data is not deleted immediately, the removal task is scheduled for the next available machine.

## View statistics of backups with Drilldown feature

By clicking the  button to the right of the user account you can open the Drilldown menu:








In the Drilldown menu you can find the diagram of the past backups and the tiles with brief summary of the backup outcomes.

The diagram depicts the number of items backed up each day. By hovering your mouse over a column in the diagram you can see the number of items backed up in each service. This number includes all new and changed items, so it may be greater than the total number of items in the backup. You can select the date range of the chart with the sliders underneath it. The maximum range displayed is 30 days.

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

## Quick Actions on Accounts

You can perform the following actions on your Box Accounts, by clicking the corresponding icons:

- Click the  icon to pause the backup process.
- Click the  icon to start/restart the backup process.
- Click the  icon to run backup immediately.
- Click the  icon to cancel backup process.
- Click the  icon to delete the backup task. Please note that if you delete a backup task, all the associated backup data is removed.

# Restore & Download Your Box Accounts

The Restore & Download option enables you to restore your backed up data. You can perform the following procedure to Restore & Download your Box accounts:


1. Click the **Recovery** element from the Navigation Panel.

The *Restore & Download* page is displayed with all your active backup account details.


### Restore & Download

#### Active Backup Accounts


Search


**Salesforce** | 1 seat  
Non-profit


>


**Salesforce** | 9 seats  
Regression May 2020 Artem


>


**Salesforce** | 2 seats  
Regression May 2020 Leonid

>


**Salesforce** | 11 seats  
Regression May 2020 Sandbox

>


**Salesforce** | 4 seats  
Renat3

>

There is the restore & download status window on the bottom of the page.



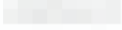



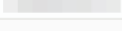
2. Click **Box** backup task from which you wish to recover the data.

The Restore or download Box active accounts page is displayed.

### Restore or download Box active accounts

Restore & Download - Box

Listed below are the accounts within your Box account backed up by CloudAlly, ready for restore and download.

ACCOUNT	FIRST BACKUP	LAST BACKUP	ACTION
Search <input type="text"/> <input type="button" value="X"/> All <input type="button" value="v"/>			
	9 minutes ago	9 minutes ago	>
	251 days ago	136 days ago	>
	103 days ago	93 days ago	>
	103 days ago	93 days ago	>
	92 days ago	51 days ago	>
	188 days ago	57 days ago	>
	252 days ago	252 days ago	>

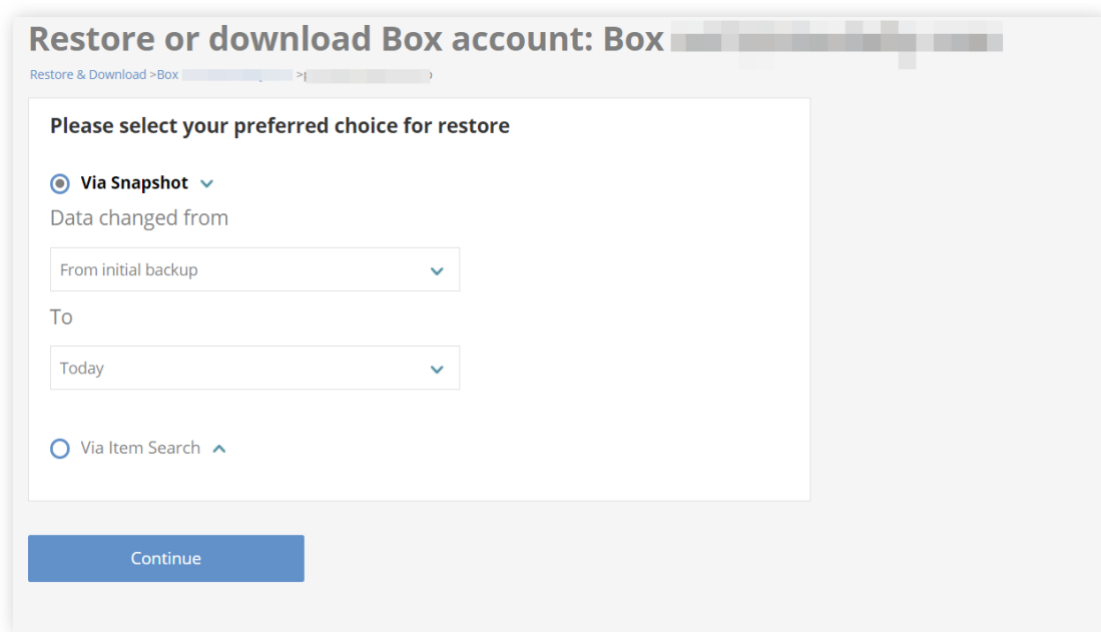
View 1 - 7 of 7
 << Page 1 of 1 >>

This page displays all your Box accounts backed up by CloudAlly with the details such as Account name, First Backup date, Last Backup date, and available Actions. Your backed-up data is ready for download, from this page.

You can filter the listed accounts using following options:

- Enter a keyword in the **Search** field and all the accounts with the entered keyword are displayed.
  - Filter accounts by statuses such as **All, Active, Not Active, Scheduled, Paused, Backed-up in another task, Archived** and **In Process**, from the drop-down list.
3. From the Actions column, click the account which you want to restore and download.

The Restore or download Box account: <account name> page is displayed.



**Restore or download Box account: Box**

Restore & Download > Box

**Please select your preferred choice for restore**

☒ **Via Snapshot** ▾

Data changed from

From initial backup ▾

To

Today ▾

☐ Via Item Search ▲

**Continue**

4. Select your preferred choice for restore by selecting the radio buttons adjacent to the required option. Available options are the following:
- Via Snapshot
  - Via Item Search

## Restore or Download Via Snapshot

1. Click the text fields adjacent to **Data changed from** and **To** fields to select the From and To dates from the calendar, if you have selected **Via Snapshot** option.

**Restore or download Box account: Box [REDACTED]**

Restore & Download >Box [REDACTED]

Please select your preferred choice for restore

☒ **Via Snapshot** ▾

Data changed from

From initial backup ▾

To

Today ▾

☐ Via Item Search

November 2019

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

Continue

2. The list of backup snapshots for the selected account is displayed. Select the archive from which you want to restore the data.

**Restore or download from Box [REDACTED] archive**

Restore & Download >Box [REDACTED] > snapshots

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

DATE	ITEM	ACTION
<input type="checkbox"/> Oct 7 2019 05:20 AM	Box	<a href="#">Q</a>
<input type="checkbox"/> Oct 6 2019 05:17 AM	Box	<a href="#">Q</a>
<input type="checkbox"/> Oct 5 2019 05:15 AM	Box	<a href="#">Q</a>
<input type="checkbox"/> Oct 4 2019 05:20 AM	Box	<a href="#">Q</a>
<input type="checkbox"/> Oct 3 2019 05:26 AM	Box	<a href="#">Q</a>
<input type="checkbox"/> Oct 2 2019 05:17 AM	Box	<a href="#">Q</a>
<input type="checkbox"/> Oct 1 2019 05:13 AM	Box	<a href="#">Q</a>
<input type="checkbox"/> Sep 30 2019 05:18 AM	Box	<a href="#">Q</a>
<input type="checkbox"/> Sep 29 2019 05:10 AM	Box	<a href="#">Q</a>
<input type="checkbox"/> Sep 28 2019 05:21 AM	Box	<a href="#">Q</a>
<input type="checkbox"/> Sep 27 2019 05:13 AM	Box	<a href="#">Q</a>
<input type="checkbox"/> Sep 26 2019 05:22 AM	Box	<a href="#">Q</a>
<input type="checkbox"/> Sep 25 2019 05:25 AM	Box	<a href="#">Q</a>
<input type="checkbox"/> Sep 24 2019 05:15 AM	Box	<a href="#">Q</a>

3. You can restore the entire snapshot by clicking the **Restore** or **Download** buttons at the bottom of the page.

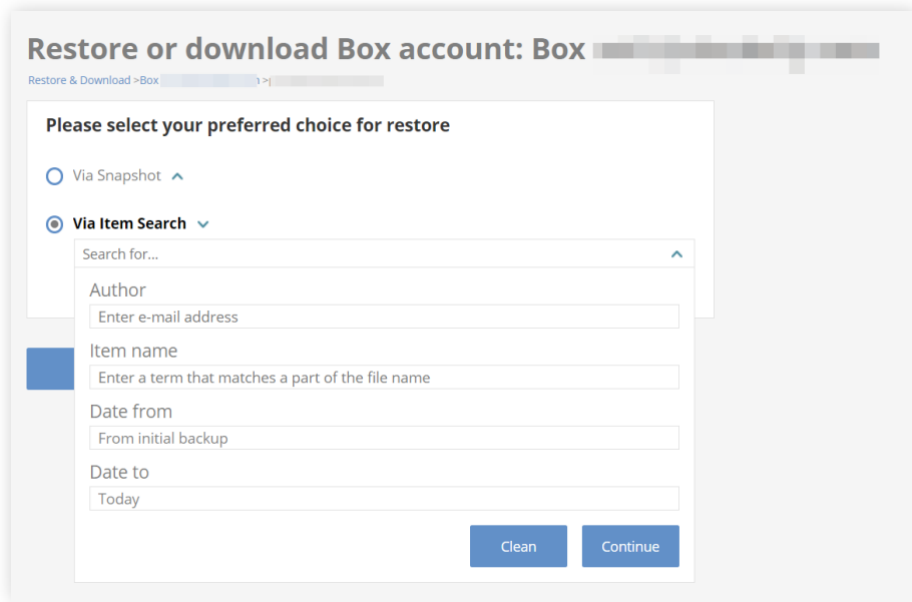
- Alternatively, you can click the  button to drill-down into the snapshot and view the item level structure of the backup data. There you can select one or more items for recovery.

[illegible]

5. Once you select a snapshot (if you wish to recover all the data in the backup), or an item/items (if you wish to recover only selected items), the buttons **Restore** and **Download** become available.
  - a. If you click the **Restore** button, the restore confirmation dialog window appears.
  - b. If you click the **Download** button, the download confirmation dialog window appears.
6. Please follow to the section **Confirm the Restore or Download** below in order to complete the process.

## Restore or Download Via Item Search

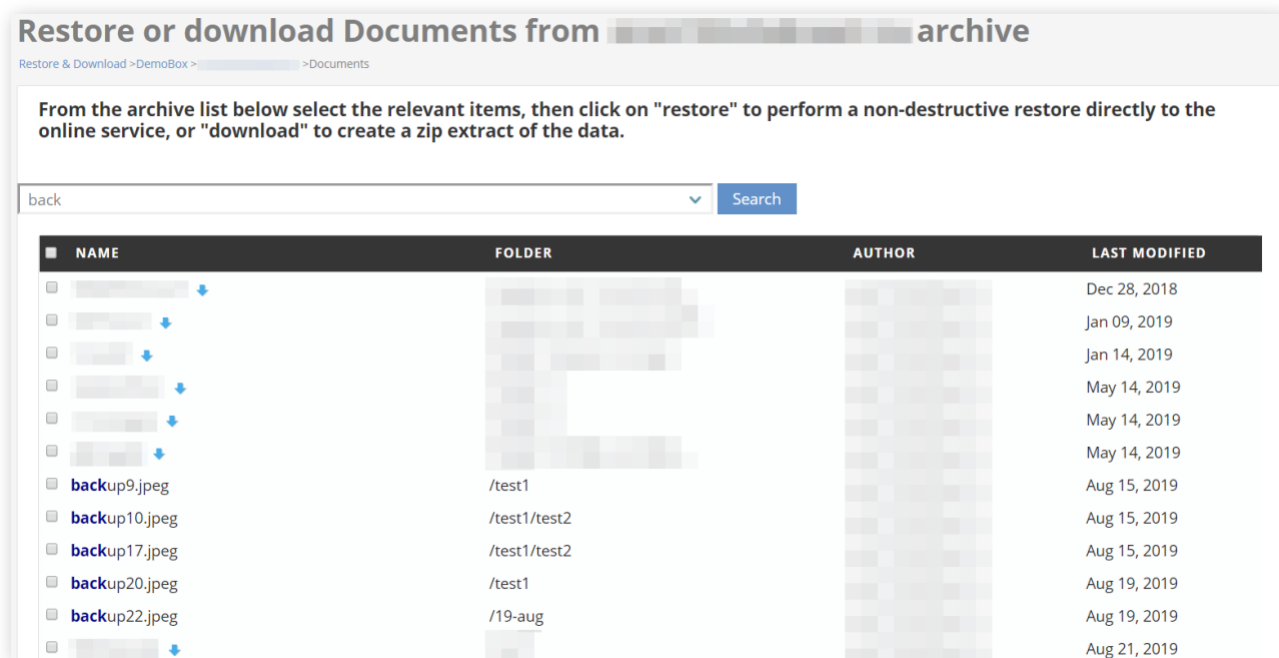
1. Enter the search phrase to search for an item in Box account.



For advanced search options click the ▼ icon and provide the following details in the drop-down form:

- **Author:** Enter a name or email address of the author of the document.
- **Item name:** Enter a term that matches with the part of the file name.
- **Date from:** Enter the date from the initial backup, from which you want to download the data.
- **Date to:** Enter a date until which the data need be searched.

2. Click the **Continue** button.



NAME	FOLDER	AUTHOR	LAST MODIFIED
[Redacted]	[Redacted]	[Redacted]	Dec 28, 2018
[Redacted]	[Redacted]	[Redacted]	Jan 09, 2019
[Redacted]	[Redacted]	[Redacted]	Jan 14, 2019
[Redacted]	[Redacted]	[Redacted]	May 14, 2019
[Redacted]	[Redacted]	[Redacted]	May 14, 2019
[Redacted]	[Redacted]	[Redacted]	May 14, 2019
backup9.jpeg	/test1	[Redacted]	Aug 15, 2019
backup10.jpeg	/test1/test2	[Redacted]	Aug 15, 2019
backup17.jpeg	/test1/test2	[Redacted]	Aug 15, 2019
backup20.jpeg	/test1	[Redacted]	Aug 19, 2019
backup22.jpeg	/19-aug	[Redacted]	Aug 19, 2019
[Redacted]	[Redacted]	[Redacted]	Aug 21, 2019

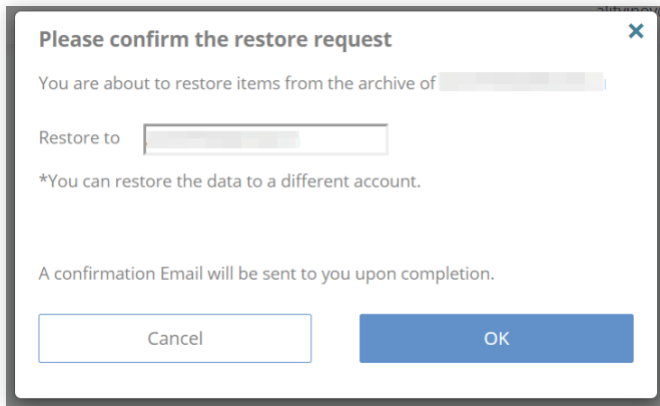
The *Restore or download Documents from <account name> archive* page is displayed. This page displays the search results with the details such as name, folder, author, and last modified date.

Select the check box adjacent to the required items to be restored or downloaded. When at least one item is selected the buttons **Restore** and **Download** become available.

Please follow to the section **Confirm the Restore or Download** below in order to complete the process.

## Confirm the Restore or Download

If you click the **Restore** button, the restore confirmation dialog window appears

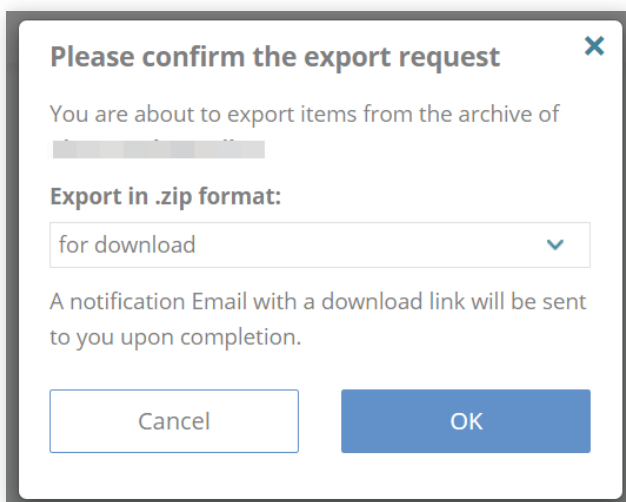


The dialog window is titled "Please confirm the restore request" with a close button (X) in the top right corner. The text inside reads: "You are about to restore items from the archive of [redacted]". Below this is a "Restore to" field with a text input box containing [redacted]. A note below the field states: "\*You can restore the data to a different account." Further down, it says: "A confirmation Email will be sent to you upon completion." At the bottom, there are two buttons: "Cancel" and "OK".

**Note:** You can restore the data to a different account but within the same domain.

1. By default, data will be restored to the same account, but you can restore to another account by changing the account name to which the data needs to be restored in the **Restore to** field.
2. Click the **OK** button. The selected backup data will be restored to the specified account. When the recovery process is complete the results summary is sent to your email.

If you click the **Download** button, the download confirmation dialog window appears








































The dialog window is titled "Please confirm the export request" with a close button (X) in the top right corner. The text inside reads: "You are about to export items from the archive of [redacted]". Below this is a section titled "Export in .zip format:" followed by a dropdown menu showing "for download" with a downward arrow. Further down, it says: "A notification Email with a download link will be sent to you upon completion." At the bottom, there are two buttons: "Cancel" and "OK".




1. Click the drop-down list and select the storage. Available options are the following: For Download, to your Amazon S3, to your Azure Blob, to your Box.com, to your Dropbox, to your Amazon S3 Compatible, to your GCP Storage. If you select options other than "For Download", you may be asked for additional credentials and/or access tokens for the selected storages.
2. Click the **OK** button. The download instructions are sent to your registered email address. The download link is valid only for 72 hours.

Once the Restore/Download process has been initiated, you can view the current status in the *Restore & Download Status* section in the *Restore & Download* page with the details such as Type, Source, Date, Status, and Action.

## Restore & download status

TYPE	SOURCE	DATE	STATUS	ACTION
Restore	Regression May 2020 Artem	Jul 10, 2020	In process	   
Restore	Regression May 2020 Artem	Jul 09, 2020	In process	   
Restore	Regression May 2020 Artem	Jul 07, 2020	In process	   
Restore	Regression May 2020 Artem	Jul 07, 2020	In process	   
Restore	Regression May 2020 Artem	Jul 07, 2020	In process	   
Restore	Regression May 2020 Artem	Jul 03, 2020	In process	   
Restore	Regression May 2020 Artem	Jul 03, 2020	In process	   
Download	Smoke June 2020	Jul 02, 2020	In process	      
Download	Smoke June 2020	Jul 02, 2020	In process	      
Download	Smoke June 2020	Jul 02, 2020	In process	      
Download	number of entities checking	Jun 29, 2020	In process	      
Download	number of entities checking	Jun 24, 2020	In process	      
Download	number of entities checking	Jun 22, 2020	In process	      
Restore	number of entities checking	Jun 22, 2020	In process	   
Download	number of entities checking	Jun 22, 2020	In process	      


View 1 - 15 of 85      << < Page 1 of 6 > >>

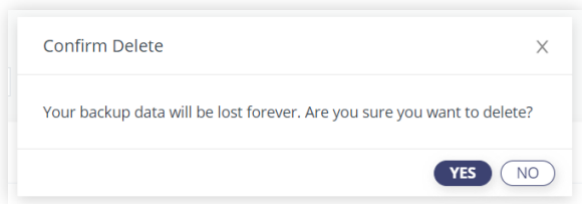
In the Action column, you can click on the  icon to view the details in a popup window. You can also click the  icon and click **Yes** in the *Confirm Cancellation* window to cancel the ongoing process. To download click on the  icon.

# Remove CloudAlly Backup

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

## Remove an Entire Backup Service

To remove an entire backup service, click the  icon adjacent to the backup service you want to remove, from the *Backups* page.



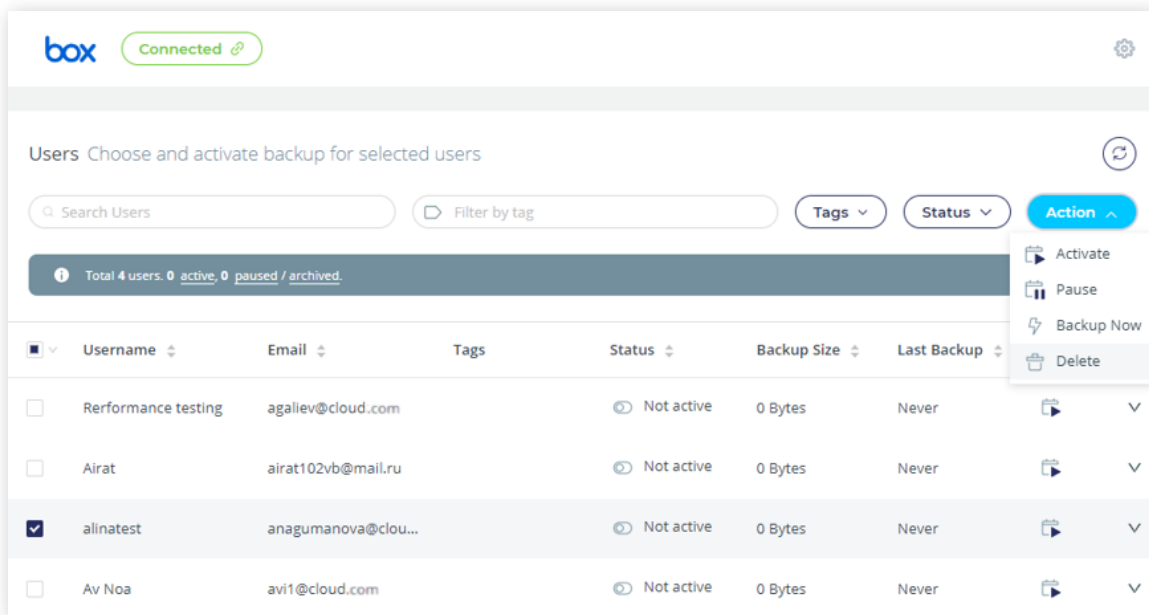
The *Confirm Delete* pop-up window is displayed with a warning message. Click the **YES** button. The selected backup service is removed from your account. To prevent backup mistaken deletions there is grace period in 7 days after it your backup will be deleted.

## Remove an Individual User Backup

To remove an individual user, perform the following procedure:

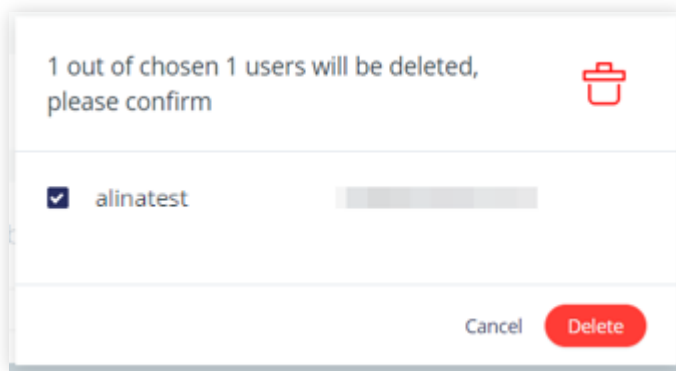
1. Click the backup service from which you want to remove the user.

The *backup task settings* page is displayed.



2. Mark the checkbox of the user that you want to remove. Click the **Delete** button in the Actions menu:

The pop-up window is displayed with a list of accounts selected for removal.



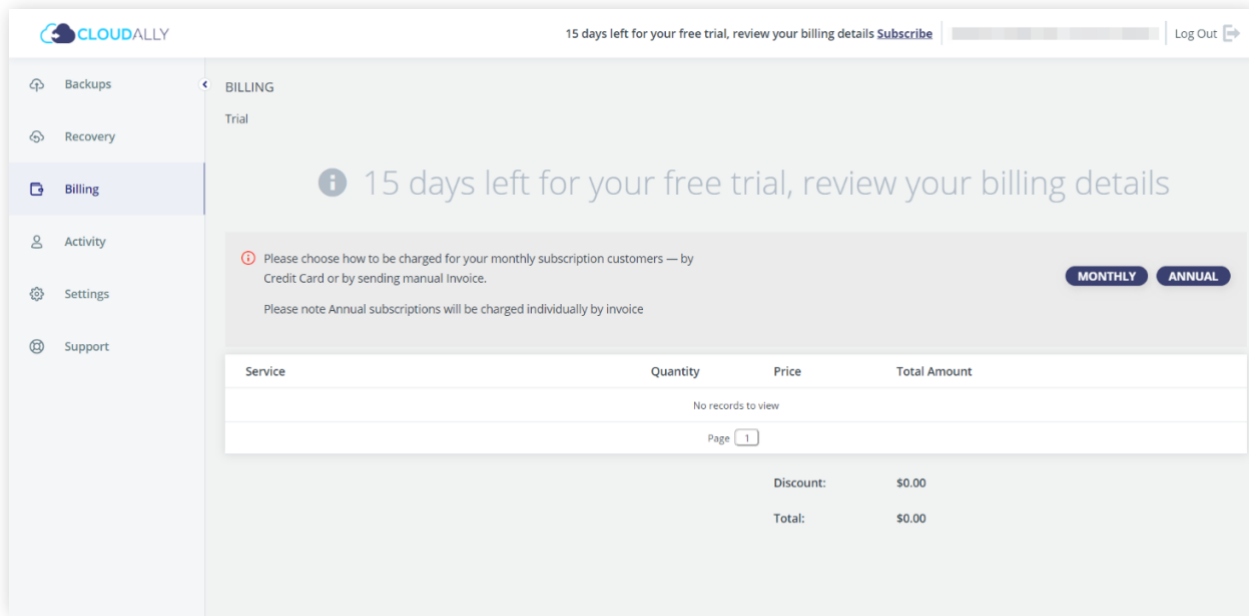
3. Click the **Delete** button.

The selected users are removed from your account.

# Manage Payments and Subscriptions

Once the trial period has ended, you need to subscribe to the CloudAlly service to access and manage your backups. To subscribe to a plan, perform the following procedure:

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



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

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

3. Click **MONTHLY** or **ANNUAL**, depending on your requirements.

**BILLING**

Billing >> Payment details

Trial

▼ Add new card details

Card Holder's Name:

Card Number:

**ADD NEW CARD**

▼ Billing Details

Currency:  Title:

\* First Name:  \* Last Name:

\* Billing Email:  Company Tax Id:

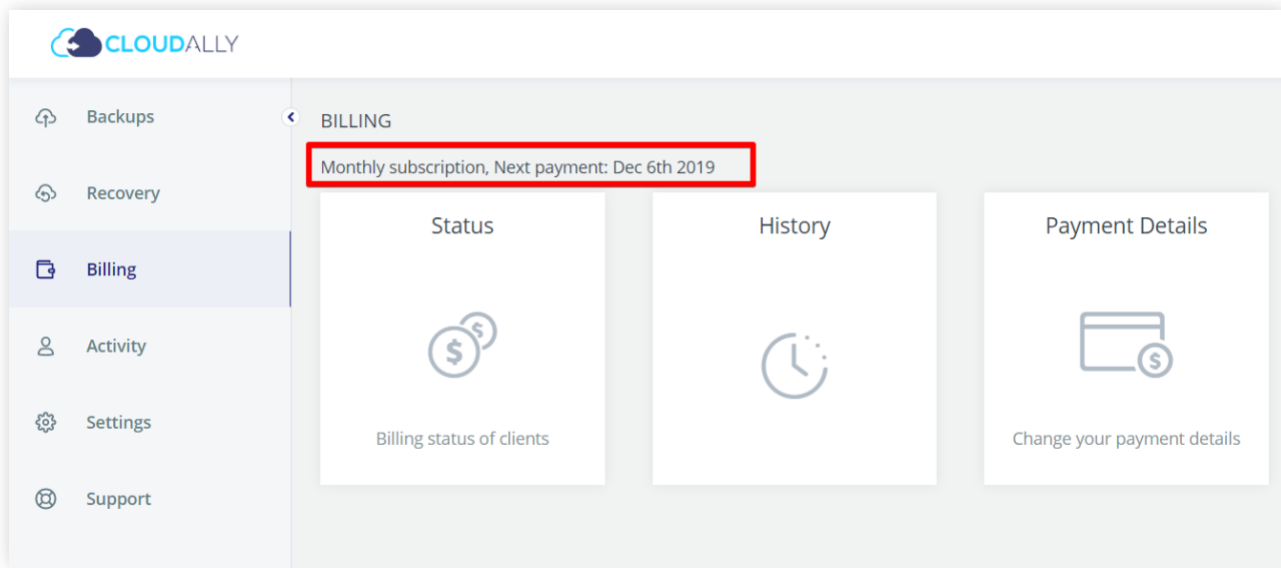
\* Company Name:  \* Address Line 1:

Address Line 2:  Address Line 3:

4. You are redirected to the **Payment Details** page. Fill in the billing and credit card details and finish the subscription process. Please refer to the section dedicated to the Payment details page for more information.
- **Monthly Subscription:** CloudAlly's billing is handled by a PCI compliant payment processor. To finalize your subscription, enter your card details and general billing information and then click **Subscribe**. The initial payment will be charged at the end of your 2-week trial period. A payment receipt will be emailed to you after each monthly charge is taken.
  - **Annual Subscription:** You will receive a confirmation message that your request has been submitted. You will then receive an email from support asking that you confirm your annual subscription request. Once confirmed, CloudAlly will email an invoice to you payable in 30 days by credit card, PayPal or bank transfer.

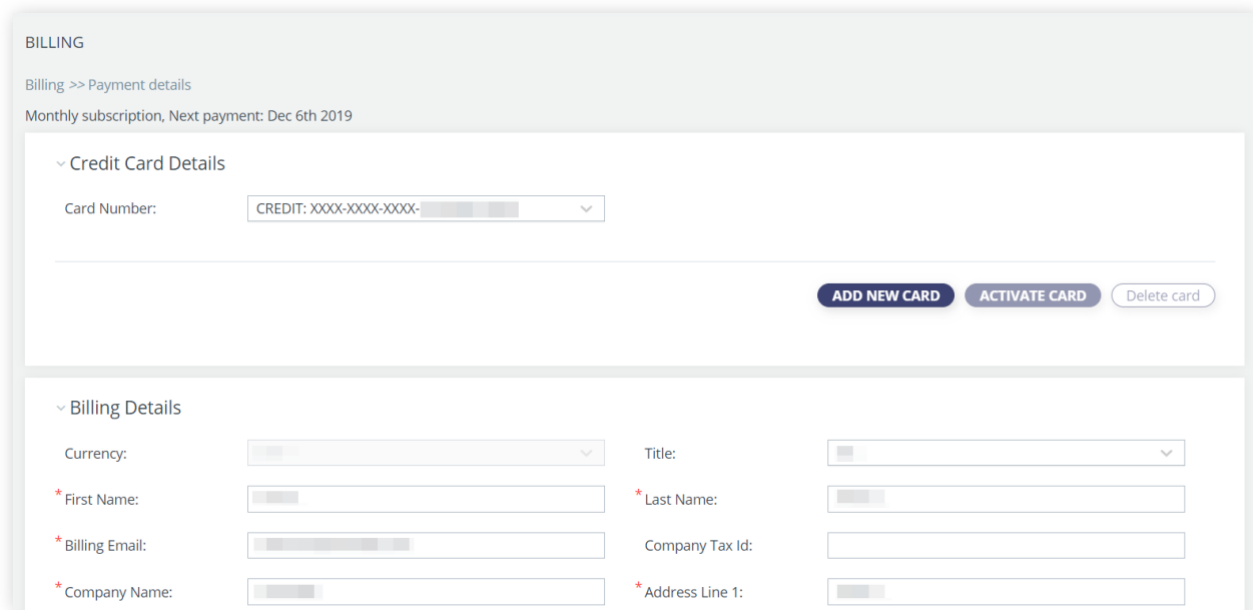
**Note:** The monthly payments are processed automatically once you provide the required information in the Billing details section and your credit card is valid. To disable the automatic payment processing please contact our support team. If you do so, you will start receiving monthly invoices for the payments.

After subscription, the **Billing** page displays additional billing management options and gives a brief summary of the payment result for the current payment period and the next payment date:



# Payment Details

The **Payment details** page contains the information used for billing. You can update the credit card details and the billing details in the two sections of the page:



**BILLING**

Billing >> Payment details

Monthly subscription, Next payment: Dec 6th 2019

▼ Credit Card Details

Card Number:

**ADD NEW CARD** **ACTIVATE CARD** Delete card

▼ Billing Details

Currency:

Title:

\* First Name:

\* Last Name:

\* Billing Email:

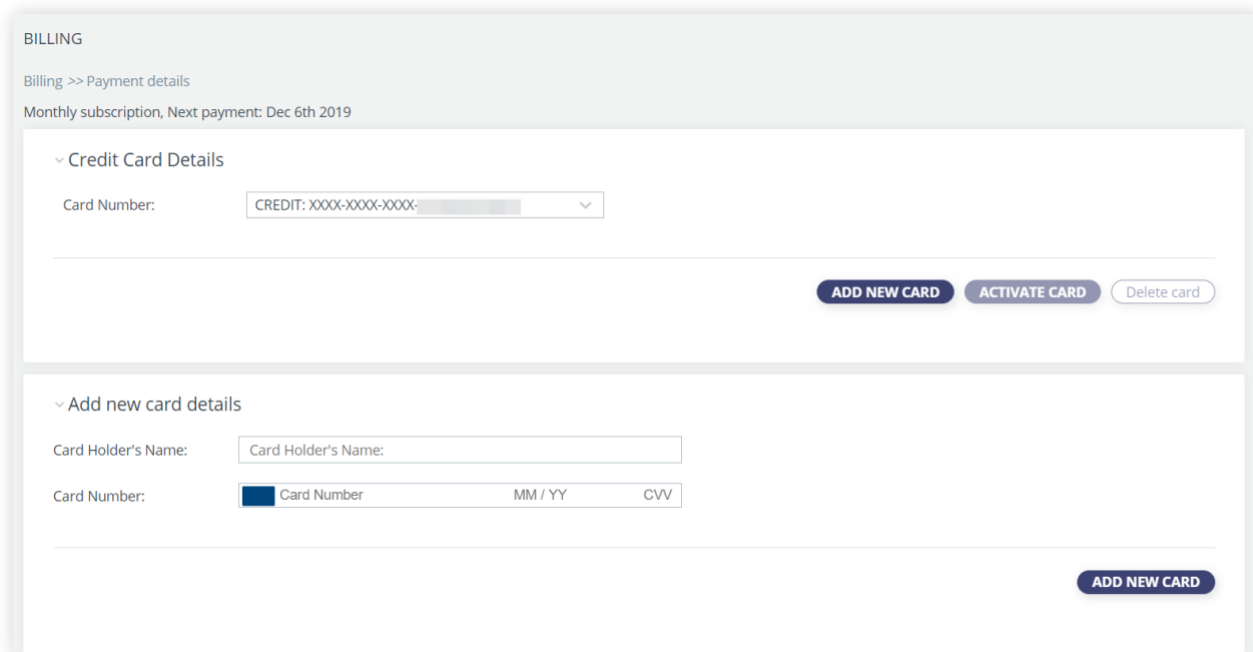
Company Tax Id:

\* Company Name:

\* Address Line 1:

## Add New Card

The **Add New Card** option enables you to define your card information for subscription payment. Perform the following procedure to create a new payment method:



**BILLING**

Billing >> Payment details

Monthly subscription, Next payment: Dec 6th 2019

▼ Credit Card Details

Card Number:

**ADD NEW CARD** **ACTIVATE CARD** Delete card

▼ Add new card details

Card Holder's Name:

Card Number:

**ADD NEW CARD**

1. Under the Cards field, click the **ADD NEW CARD** button.

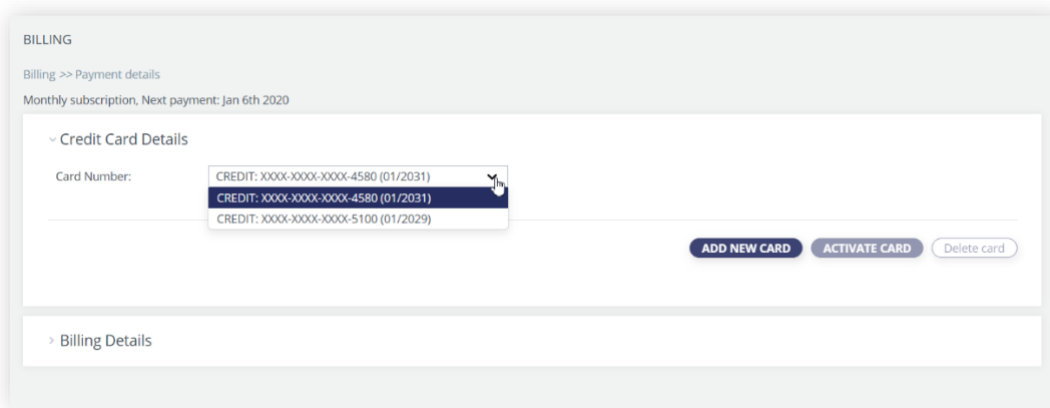
2. Enter the card details such as Card Number, CVV, Card holder's name, and card expiry date.
3. Click **ADD NEW CARD** button.

The new card information is saved. You can use this card after card activation.

### Update Billing Details

You can switch the payment method used in the billing process. To change your existing payment method, perform the following procedure:

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



The **Billing details** section displays the billing information such as Currency, Title, Name, Billing email, etc.

4. Scroll down for more fields of the Billing details section. In the Company Tax ID field indicates your company tax ID.

Due to Value-added tax (VAT) Israel companies must include their Tax Id. Therefore the field Company Tax Id is mandatory for Israel and without the filled out field our company will not be able to provide the services.

▼ Billing Details

Currency:

Title:

\* First Name:

\* Last Name:

\* Billing Email:

Company Tax Id:

\* Company Name:

\* Address Line 1:

Address Line 2:

Address Line 3:

\* Country:

\* City:

\* Zip Code/Postal Code:

\* Phone number:

Email Invoice/Receipt: ☒ Link ☐ Attachment

UPDATE BILLING DETAILS

5. Edit/update the required fields. Please note that the fields marked with the \* symbol are mandatory.
6. Click the **UPDATE BILLING DETAILS** button.
7. The updates are saved.

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

**Note:** You can change the billing currency by contacting our support team.


# Status

This page displays the next payment forecast for the upcoming payment date. The details include Service type and backup name, Quantity, Unit Price, and the Total Amount.

## BILLING

Billing >> Status

Monthly subscription, Next payment: Mar 6th 2020

 Payment forecast: \$41.00, Due on Mar 6th 2020

Service	Quantity	Unit Price	Total Amount
Exchange, Active (DemoBackup)	10 mailboxes	\$3.00	\$30.00
Box, Active (DemoBox)	820.78 MB	\$2.00	\$2.00
Dropbox, Active (DemoDropbox)	11.48 MB	\$2.00	\$2.00
SharePoint, Active (Sharepoint Demo)	633.72 MB	\$2.00	\$2.00
OneDrive, Active (OneDrive Demo)	164.32 MB	\$2.00	\$2.00
Groups & Teams, Active (Groups Demo)	7.21 GB	\$3.00	\$3.00

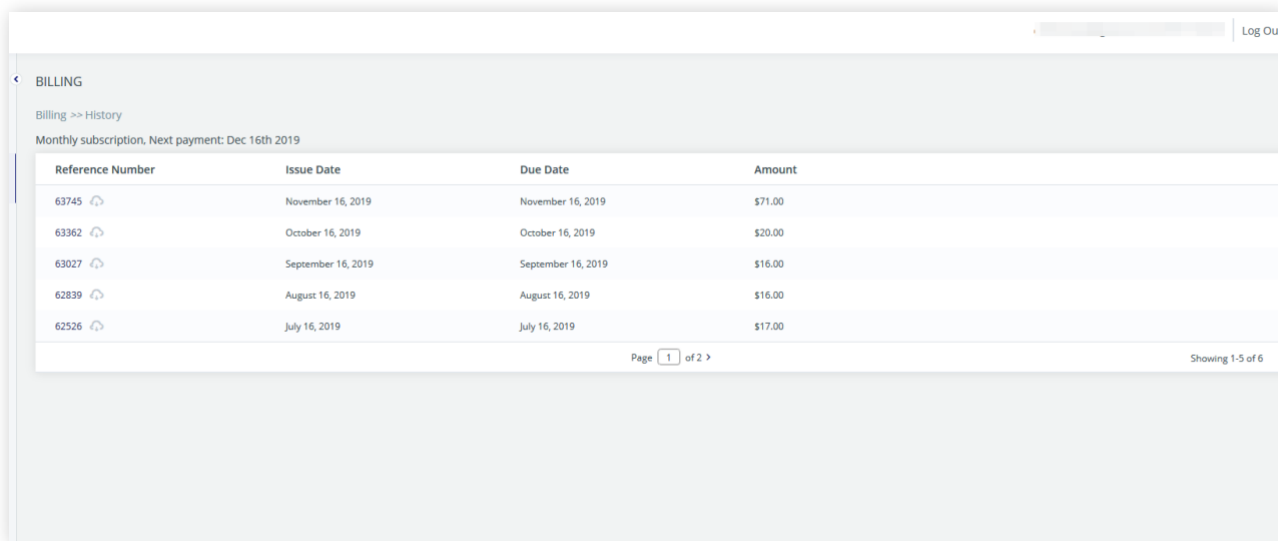
Page  of 1

Showing 1-6 of 6






**Total: \$41.00**

# History

This page displays the history of payments.




The screenshot shows a web interface for the 'BILLING' section. It includes a 'Log Out' link in the top right corner. Below the 'BILLING' header, there is a breadcrumb 'Billing >> History' and a note 'Monthly subscription, Next payment: Dec 16th 2019'. A table displays the payment history with columns for Reference Number, Issue Date, Due Date, and Amount. The table lists five payments from July to November 2019. At the bottom of the table, it indicates 'Page 1 of 2' and 'Showing 1-5 of 6'.

Reference Number	Issue Date	Due Date	Amount
63745 	November 16, 2019	November 16, 2019	\$71.00
63362 	October 16, 2019	October 16, 2019	\$20.00
63027 	September 16, 2019	September 16, 2019	\$16.00
62839 	August 16, 2019	August 16, 2019	\$16.00
62526 	July 16, 2019	July 16, 2019	\$17.00

Page 1 of 2 > Showing 1-5 of 6

By clicking on the invoice number, you can download the invoice file. An example of an invoice/receipt is displayed below:



To: [redacted]@gmail.com  
Washington, United States


CloudAlly Ltd.  
Tax ID: 51459 [redacted]  
www.cloudally.com  
j@cloudally.com

**Proforma Invoice 6114**  
Certified Copy

30 Oct 2019  
Due by 31 Oct 2019

QTY	Description	Price	Total
1	backup	1.00 USD	1.00 USD
	Subtotal		1.00 USD
	VAT 0%		0.00 USD
	<b>Total payable</b>		<b>1.00 USD</b>

Bank (BANK [redacted] t: [redacted])

Signature: CloudAlly Ltd  
c.n 514596667 

DIGITALLY SIGNED  
Created by Green Invoice

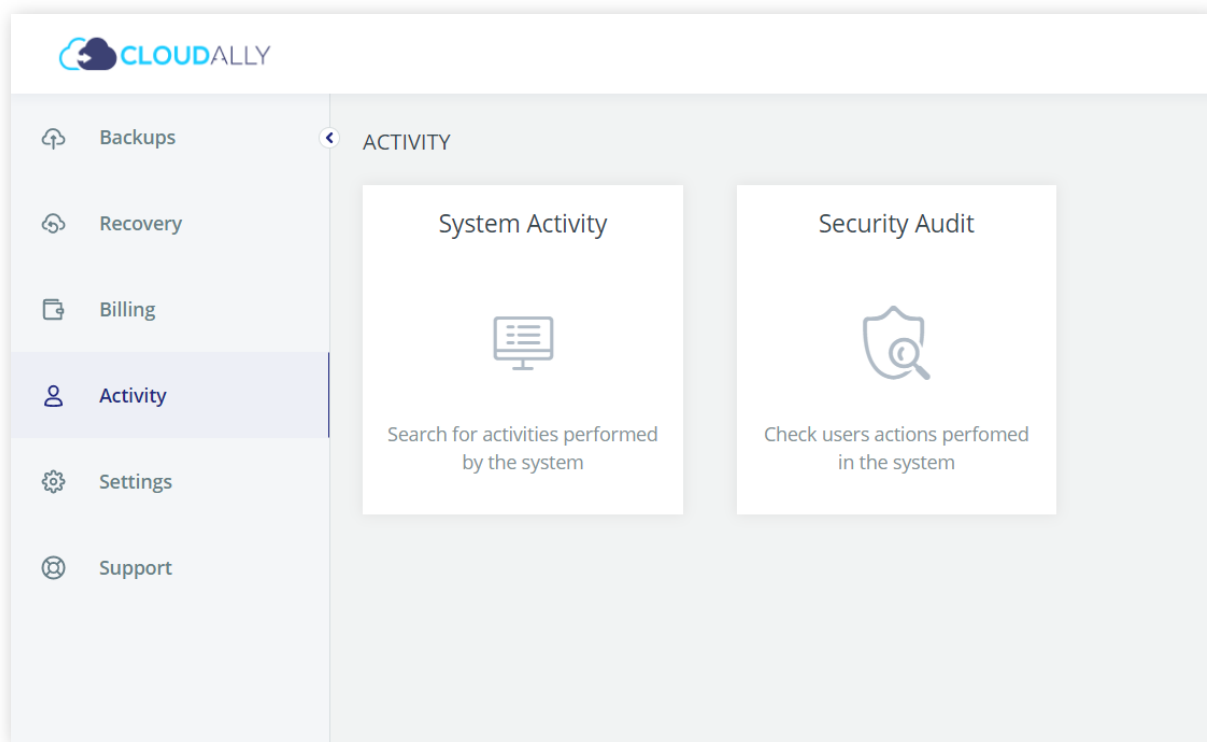
Proforma Invoice 6114 page 1 of 1

Please note that the invoice/receipt above is given only as an example and is issued for an account using other backup solution. The invoice provides details on the number of backed up accounts or the amount of stored data, and the total amount paid. It also displays the payment method used.

# Manage Your CloudAlly Account

This section guides you through the processes of managing your CloudAlly account activity, account settings, password, setting up two-factor authentication, and manage users.

## View the Account Activity



The Activity section enables you to view your CloudAlly account activity including System Activity and Security Audit. You can access this section by clicking the Activity element from the navigation pane.











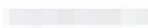





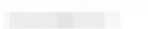


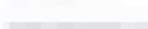


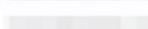


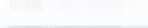





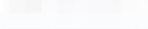




## System Activity


The System Activity page displays your account activity with the details such as Date, Activity, Service, Account, and Description.


ACTIVITY

Activity >> System activity

Show: From:  To:  User Activity:  Status:

Date	User Activity	Service	Status	Task	Item	
Nov 29 2019 06:15 AM	Backup	 Office 365 Exchange (...)	Completed	DemoBackup		
Nov 29 2019 06:15 AM	Backup	 Office 365 Exchange (...)	Completed	DemoBackup		
Nov 29 2019 06:15 AM	Backup	 Office 365 Exchange (...)	Completed	DemoBackup		
Nov 29 2019 06:15 AM	Backup	 Office 365 Exchange (...)	Completed	DemoBackup		
Nov 29 2019 06:15 AM	Backup	 Office 365 Exchange (...)	Completed	DemoBackup		
Nov 29 2019 05:23 AM	Backup	 Box	Completed	DemoBox		
Nov 28 2019 06:14 AM	Backup	 Office 365 Exchange (...)	Completed	DemoBackup		
Nov 28 2019 06:14 AM	Backup	 Office 365 Exchange (...)	Completed	DemoBackup		
Nov 28 2019 06:14 AM	Backup	 Office 365 Exchange (...)	Completed	DemoBackup		
Nov 28 2019 06:14 AM	Backup	 Office 365 Exchange (...)	Completed	DemoBackup		
Nov 28 2019 06:14 AM	Backup	 Office 365 Exchange (...)	Completed	DemoBackup		
Nov 28 2019 05:16 AM	Backup	 Box	Completed	DemoBox		


This page provides you the means to filter and search the list of backup tasks, export the list as a CSV file and to view more details on any backup task. The latter can be achieved by clicking the  button. The Info pop-up displays the backup execution time, the size of the stored data and the number of entities and the summary of the backup execution:

 Info
 ×

EXECUTION TIME: Nov 29 2019 05:23 AM

DATA SIZE: 815.77 MB

NUMBER OF ENTITIES: 5

DESCRIPTION: Box Completed (  , 5 items, 312.19 KB delta data size, 0 minutes).

## Security Audit

The Security Audit page provides information about all the security related actions that have happened in your CloudAlly account. The actions that are displayed are the sign-ins, password changes, failed sign-ins, etc. The information includes the date of the event, the type of activity, the status of the activity, the account performing the activity and the description.

ACTIVITY

Activity >> Security audit

Show: From:  To:  User Activity: All Status: All Reset Export

Date	User Activity	Status	Performed By	Description
Nov 29 2019 02:41 PM	Sign-in	Completed		Open ID (GOOGLE) Sign In (OK) Chrome fro...
Nov 28 2019 05:50 PM	Sign-in	Completed		Open ID (GOOGLE) Sign In (OK) Chrome fro...
Nov 27 2019 03:44 PM	Sign-in	Completed		Open ID (GOOGLE) Sign In (OK) Chrome fro...
Nov 27 2019 10:54 AM	Sign-in	Completed		Open ID (GOOGLE) Sign In (OK) Chrome fro...
Nov 26 2019 04:17 PM	Sign-in	Completed		Open ID (GOOGLE) Sign In (OK) Chrome fro...
Nov 21 2019 02:00 PM	Sign-in	Completed		Open ID (GOOGLE) Sign In (OK) Chrome fro...
Nov 21 2019 11:06 AM	Sign-in	Completed		Open ID (GOOGLE) Sign In (OK) Chrome fro...
Nov 21 2019 10:25 AM	Sign-in	Completed		Open ID (GOOGLE) Sign In (OK) Chrome fro...
Nov 20 2019 03:36 PM	Sign-in	Completed		Open ID (GOOGLE) Sign In (OK) Chrome fro...
Nov 20 2019 01:09 PM	Sign-in	Completed		Open ID (GOOGLE) Sign In (OK) Chrome fro...

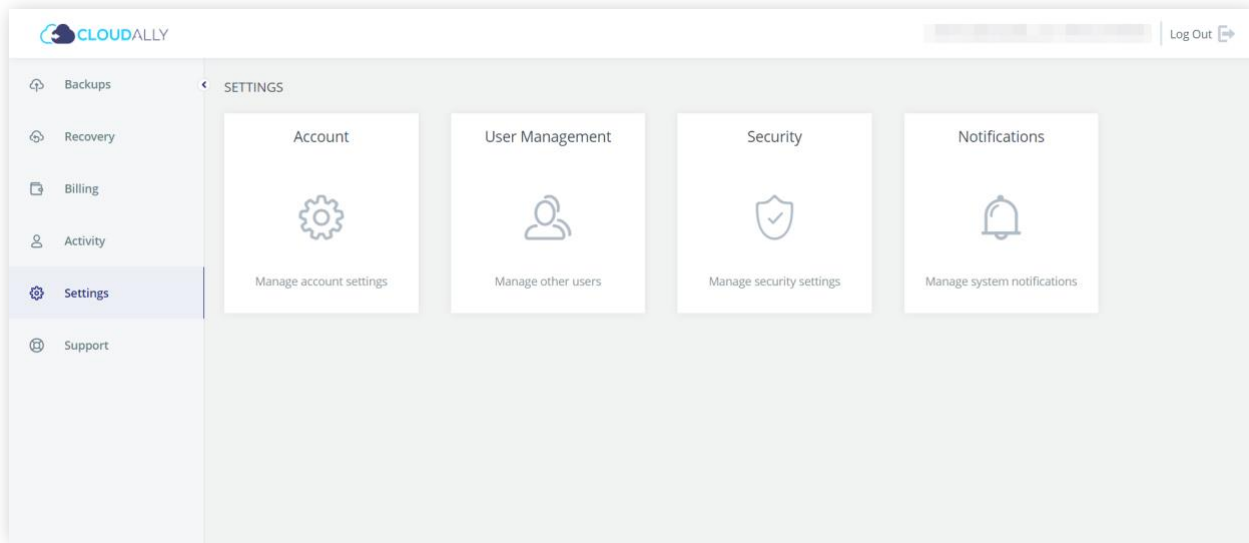
Page 1 > Showing 1-10

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

# Manage Your CloudAlly Settings

The Settings page provides you with tools to control your CloudAlly account and accounts of the users in your account. The Settings section consists of 4 sub-sections:

- Account
- User Management
- Security
- Notifications



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

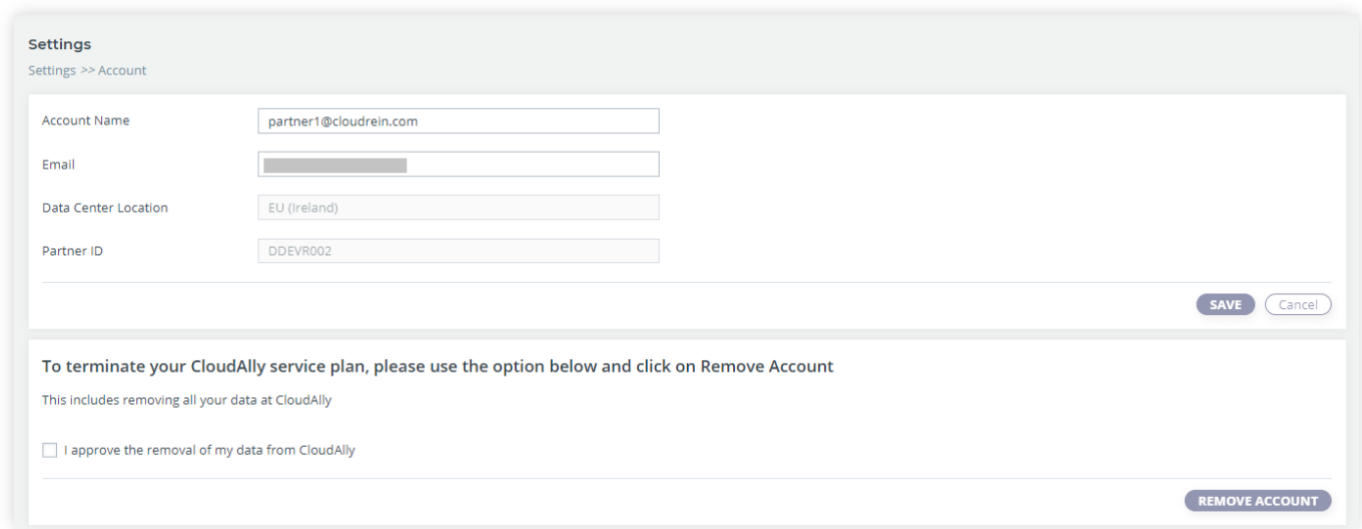
# Account settings

This page allows you to change the name of your account and the email address. You can only change the Data Center Location by contacting our support team. Finally, this page also allows you to terminate your CloudAlly account. Please note that if you terminate your CloudAlly account, the data from all your backups will be deleted.

To update/change your CloudAlly account details, perform the following procedure:

1. Click the **Settings → Account** element from the Navigation Panel of the CloudAlly web application.

The *Settings >> Account* page is displayed.



The screenshot shows the 'Settings >> Account' page. It contains four input fields: 'Account Name' with the value 'partner1@cloudrein.com', 'Email' (redacted), 'Data Center Location' with the value 'EU (Ireland)', and 'Partner ID' with the value 'DDEV002'. There are 'SAVE' and 'Cancel' buttons. Below these fields is a section titled 'To terminate your CloudAlly service plan, please use the option below and click on Remove Account'. It includes a sub-header 'This includes removing all your data at CloudAlly' and a checkbox labeled 'I approve the removal of my data from CloudAlly'. A 'REMOVE ACCOUNT' button is at the bottom right of this section.

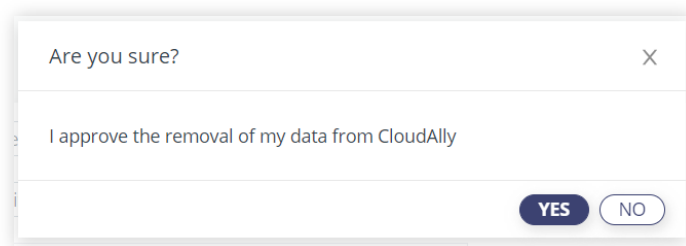
2. Update the **Account Name** and/or **Email**.
3. Click the **SAVE** button to save the details.

## Canceling Your CloudAlly Service Plan

To cancel your CloudAlly service plan, perform the following procedure:

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

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



The screenshot shows a confirmation pop-up window titled 'Are you sure?'. It contains a checkbox labeled 'I approve the removal of my data from CloudAlly'. At the bottom, there are 'YES' and 'NO' buttons.

2. Click **YES** button to confirm the cancellation.

# User Management

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

SETTINGS


Settings >> User Management

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

+ Add new user

Email	Type	2FA Authentication	
[Redacted]	Google	[?]	
[Redacted]	Email	[?]	[Edit] [Remove]

Page 1 of 1 Showing 1-2 of 2

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

SETTINGS

Settings >> User Management >> New user

Email: [Redacted] Type: Email

Password: [Redacted] Role: Custom

Operations

☐ General

- ☐ Update CloudAlly account settings and unsubscribe from CloudAlly
- ☐ View billing page and manage payment details
- ☒ View support page
- ☒ View account activity
- ☒ Show all support tickets
- ☐ Manage Notifications
- ☒ View backups page

☐ Backup Tasks

- ☐ Activate new backup tasks
- ☐ Modify backup tasks
- ☐ Delete backup tasks
- ☒ Pause backup tasks
- ☒ Execute backup tasks

Services

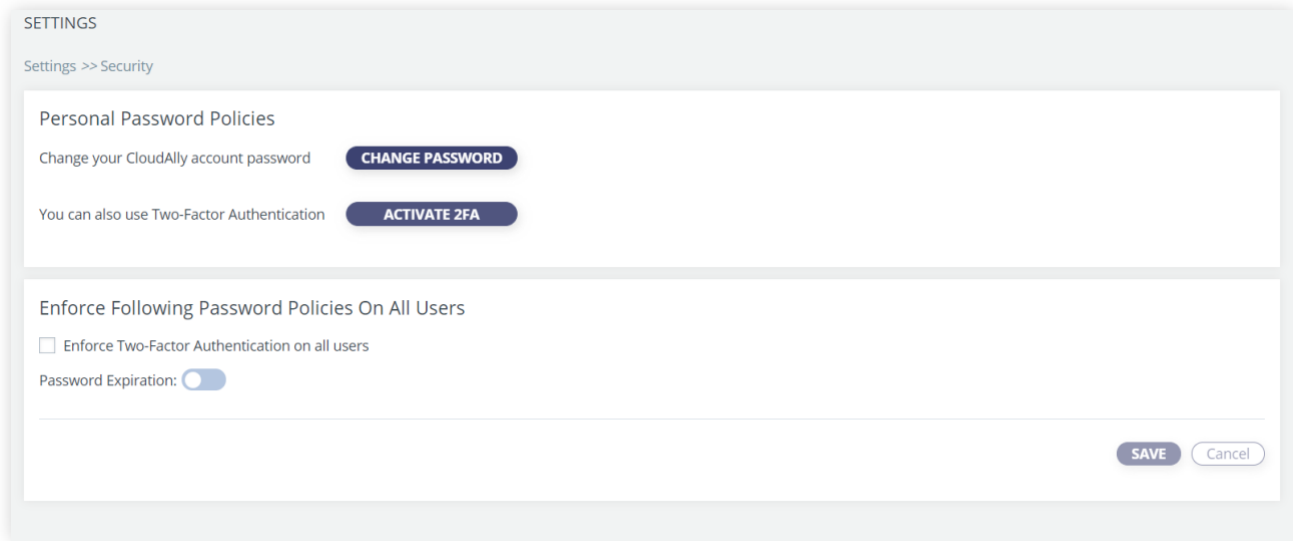
☐ All

- ☐ Office 365 Exchange
- ☐ Office 365 Groups / Teams
- ☐ SharePoint Online
- ☐ OneDrive
- ☐ Salesforce
- ☒ Dropbox
- ☒ Box
- ☒ G Suite
- ☒ G Team Drive
- ☐ IMAP
- ☐ SimpleDB

**Note:** Please note that selecting the role “Administrator” enables all services and operations.

In order to save the changes please scroll to the bottom of the page and click the **SAVE** button.

## Security Settings



SETTINGS

Settings >> Security

**Personal Password Policies**

Change your CloudAlly account password **CHANGE PASSWORD**

You can also use Two-Factor Authentication **ACTIVATE 2FA**

**Enforce Following Password Policies On All Users**

☐ Enforce Two-Factor Authentication on all users

Password Expiration: ☒

**SAVE** **Cancel**

The **Security** settings page provides the means to update your password or set up two-factor authentication.

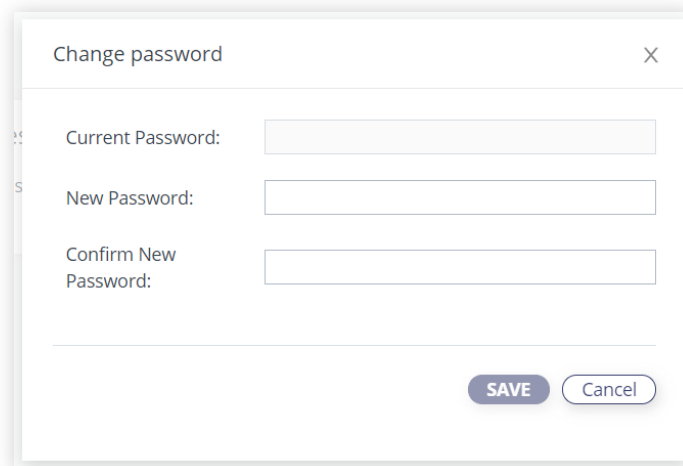
The bottom section allows you to enforce certain security policies for your users' accounts. With the **Enforce Two-Factor Authentication** option you can make the two-factor authentication mandatory for all the users in your account. By setting the **Password Expiration**, you can enable the password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

## Changing your CloudAlly password for credential-based authorization

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

1. From the Settings >> Security page
2. Click the **CHANGE PASSWORD** button in the Personal Password Policies panel.

The *Change password* pop-up is displayed.



Change password X

Current Password:

New Password:

Confirm New Password:

**SAVE** **Cancel**

3. Enter the current password in the **Current Password** field.

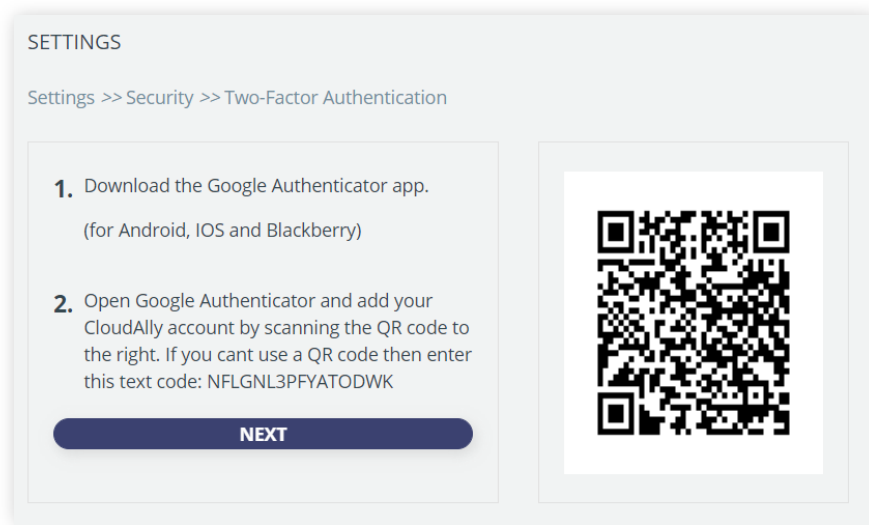
4. Enter the new password in the **New Password** field.
5. Reenter the new password in the **Confirm New Password** field.
6. Click **SAVE** button to save the new password. You can now use this password to access your CloudAlly account.

## Two-Factor Authentication

Two-factor authentication provides additional security to your CloudAlly account and your backup data. Perform the following procedure to enable two-factor authentication:

1. Click the **ACTIVATE 2FA** element from the Navigation Panel of the CloudAlly web application.

The Two-Factor Authentication page is displayed.



2. Download an Authenticator app, depending on your platform (Android or iOS).
3. Open the Authenticator app and add your CloudAlly account by scanning the QR code provided in the CloudAlly web application.

If you cannot use a QR code, then enter the text code provided in the CloudAlly web application.

A six-digit code is generated.

4. Click the **NEXT** button.

Enter the 6-digit code that the application generated.

5. Click the **ENABLE** button to complete the process of activating the Two-factor authentication.

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

# Notifications Settings

This page provides a set of tools for control over the flow of the notifications. Here you can control the general settings of the notification, such as the frequency of reports (daily or weekly), their detail level (full or failures only), whether it is attached to the report email, or provided via a link.

Also, this page displays the summary of the recipients' notification settings. You can add a new recipient with the

 **Add new recipient** button or edit/delete an existing one with the   buttons.

SETTINGS

Settings >> Notifications

Summary Report

Summary Report ☒


Report Type: ☒ Full Report ☐ Failures Only





















Provide as: ☒ CSV Attachment ☐ Download Link

Report Frequency:

SAVE

Send Notifications To:

 Add new recipient

Email	Display Name	Summary Report	Recovery Notification ⓘ	Exceptions Notification ⓘ	Action
		✓	✓	✓	 
			✓		 
		✓	✓		 
			✓	✓	 
		✓		✓	 
		✓	✓	✓	 
		✓	✓	✓	 
			✓		 
		✓	✓	✓	 
		✓		✓	 

Setting up a new recipient is simple:

1. Click the **+ Add new recipient** button
2. Enter the **Email** of the recipient and the **Display name**. The Display name is used in the report email to address the recipient.
3. Select the required notification types.
4. Click **SAVE** button to create the new recipient. You may need to scroll to the bottom of the page in order to find the **SAVE** button.

**Settings**  
Settings >> Notifications >> New E-mail report

**User Info**

Email  Display Name

**Notifications**

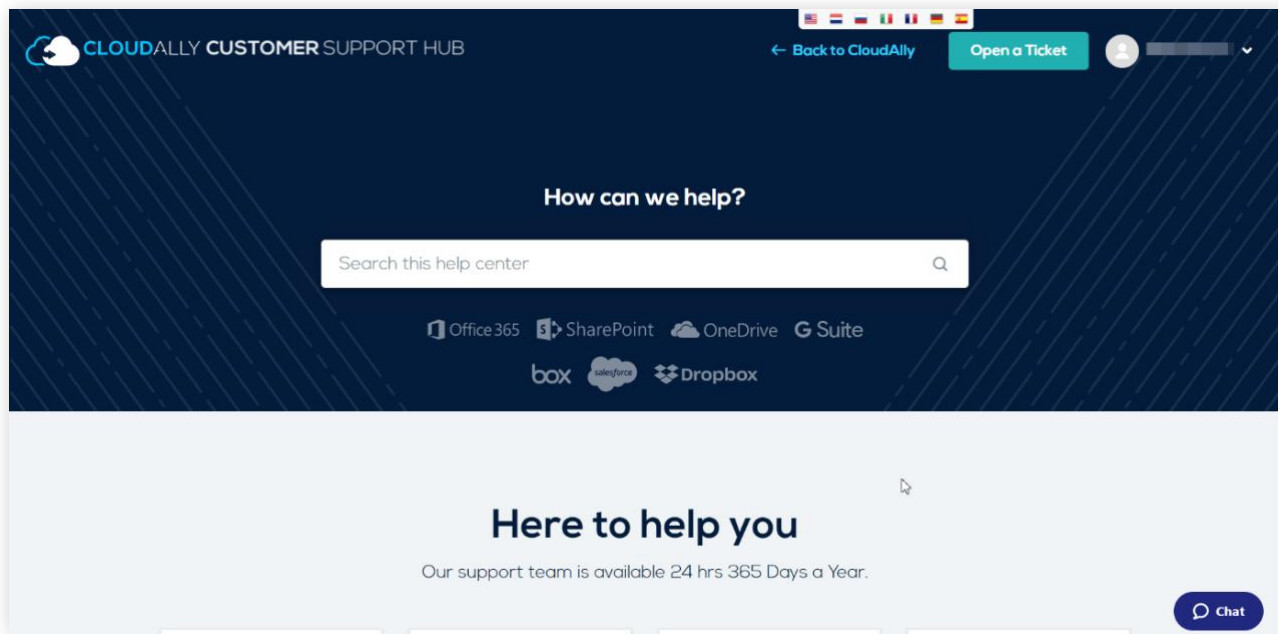
☐ Summary Report ☐ Recovery Notification ☐ Exceptions Notification ☐ Auto Discovery Notification

**SAVE** **Cancel**

An example of a new recipient set-up screen

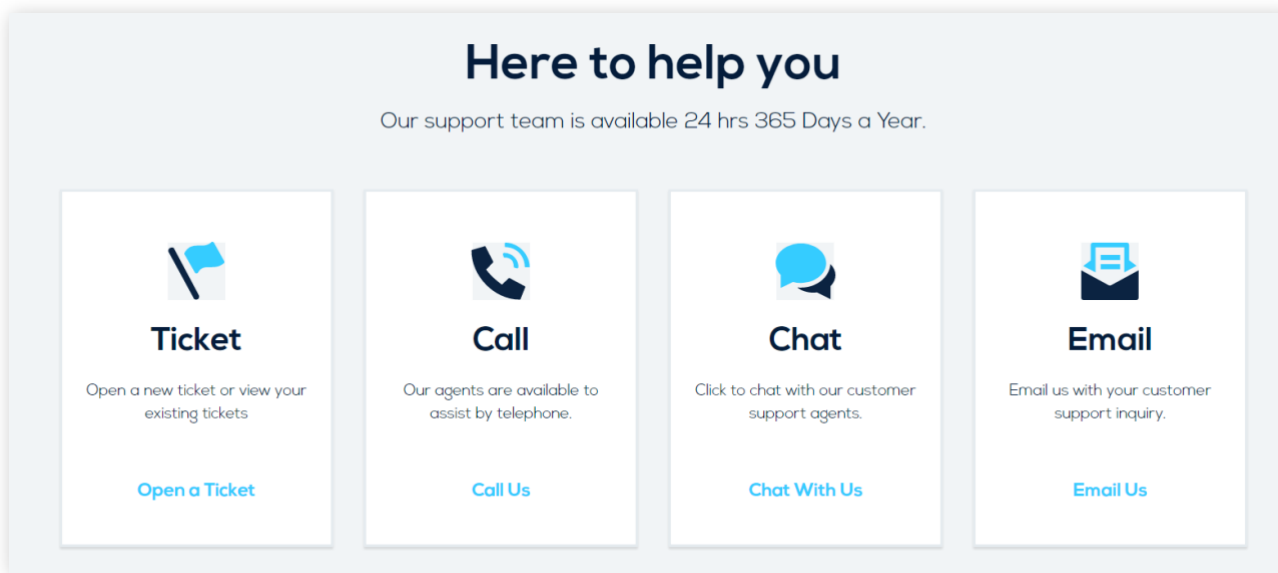
# Support pages

The Support entry of the Navigation Panel redirects you to our support hub.



In the support hub you can find articles covering some of the most common questions and providing instructions.

Please feel free to contact our support engineers using a method that is the most convenient for you: via email, by phone, or in the text chat. Open a ticket and the support team will contact you to help you with any question or problem.



Browse the articles, instructions and tutorials in the Help Topics section. These materials are especially useful for new users as they explain the settings and procedures of backup activation, management and recovery.

## Help Topics



**Getting Started**



**My Account**



**Backup Solutions**



**User Guides**



**Videos**



**Copyright & Legal**

# Helpful Resources

## About CloudAlly

Founded in 2020 as one of the world's first cloud-to-cloud backup services for Google Apps and Salesforce, CloudAlly led the industry with the first commercially available Microsoft Office 365 cloud backup in Q1 2014. ISO 27001 and HIPAA certified, CloudAlly adheres to industry standard best practices for information security management, including EU-GDPR compliance.

## Knowledge Base

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

## Support

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

## Privacy

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

## Security

CloudAlly provides a secure online backup solution with internationally recognized accreditation for information security management. Read how we protect your data at <https://www.cloudally.com/cloud-backup-solutions/secure-online-backup>.

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