Metalogix

SharePoint Backup Version 6.1 Advanced Installation Guide

Publication Date: August 05, 2016

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Technical Support

For information about Metalogix Technical support visit http://metalogix.com/support.

Technical support specialists can be reached by phone at 1.202.609.9100.

The level of technical support provided depends upon the support package that you have purchased. Contact us to discuss your support requirements.

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About This Guide

The Advanced Installation Guide provides information on the installation, upgrading, and removal procedure of Metalogix SharePoint Backup in various SharePoint farm configurations.

Installation and configuration issues

When you install Metalogix SharePoint Backup, the installer creates a new Web application policy that grants full control to every Web application in the farm, and then assigns this policy to the Backup Service account.

This version of Metalogix SharePoint Backup includes changes to the way that permissions are handled in differential backup and restore. When you upgrade to the current version, you should immediately perform a differential backup to accurately capture any permissions changes.

If you add a Web application to the farm after you install Metalogix SharePoint Backup, you should restart all of the Backup Service instances in the farm.

Considerations

Here are a few general considerations about SharePoint Backup to keep in mind:

- When you specify a backup set location, the full path of the location, including the backup set folder and the file name of any contents, must be less than 255 characters. If the path name is too long, backups may complete successfully, but restore operations fail. If a restore operation fails and the error message indicates that the file does not exist in the source directory, verify that the path is less than 255 characters.
- When you perform an out-of-place restore of any item, the full path of the item, including the item file name, must be less than 255 characters.
- If you use "Restore" or "Quick Restore" to restore in place and the target item already exists or is in the site or site collection recycle bin, a duplicate item may appear. Alternatively, an error may occur during the restore process. When you restore an item in place, you should ensure that the items that you are restoring do not exist in the site recycle bin, or the site collection recycle bin.
- When searching for items in a backup set, if there is a large number of matches for a given search term, some items that match the search term may not be included in the search results.
- The Management Service maintains a cache of the members of the farm administrators group. If you create a new farm administrator, the new administrator does not have rights to existing backup sets until the Management Service refreshes its cache. Normally, the Management Service refreshes the cache every five minutes. You can also use the Services control panel to restart the Management Service to force it to rebuild its cache.
- If ActiveX Scripting is set to prompt, Metalogix SharePoint Backup help may not load properly, and the help window displays a blank screen.

Considerations for Tivoli Storage Manager

Here are a few considerations for users using Tivoli Storage Manager:

- If you use a Tivoli Storage Manager (TSM) virtual client node as a backup location and the TSM storage pool runs out of free space, Metalogix SharePoint Backup encounters errors. You should ensure that the TSM storage pool that hosts a backup location does not run out of free space.
- If you import a backup stored in a TSM virtual client node, you can only perform in place restores from that set.

Management Console considerations

Here are a few things to consider about your management console:

- When the Management Console host is a Windows 2008 Server computer, an access denied error may appear when you try to stop or start the Backup Service. The error appears due to the User Account Control (UAC) group policy. You can either use the Run As command to run the Backup Service as the user <*domain*>\Administrator or you can disable the User Account Control: Run all administrators in Admin Approval Mode local security policy.
- If you archive a backup set and remove it from the backup set storage location, the Metalogix SharePoint Backup repository database contains cached information about the original location of the backup set. If you move the backup set to a new location and then import the backup set, you should close and then restart the Management Console before you restore SharePoint objects from that backup set.

- If the SQL Server Browser Service is stopped or is disabled on the computer that hosts the repository database, the error message "An error occurred connecting to the Repository Database. Please verify the preferences are set correctly for Repository Database Connection." appears. The Management Console relies on the SQL Server Browser Service to connect to the repository database. Restart the SQL Server Browser Service and start the Management Console again.

Backup Service considerations

Here are a few things to consider about the backup service:

- If you deploy a new a solution (WSP file) to your SharePoint farm while one or more Backup Service instances are running, you must restart all of the Backup Service instances before you create or perform a backup or an error message may appear.
- If a backup or restore job is in progress and the computer that hosts the Backup Service is rebooted, queued jobs may not start. If this occurs, restart all Backup Service instances to start the queued jobs.

Self-Service Recovery considerations

Here are a few things to consider about Self-Service Recovery:

- When you use the Self-Service Recovery feature to locate and retrieve files, Metalogix SharePoint Backup can only retrieve files from backup sets created by the same version of the product. This version retrieves files from backup sets created by this same version. To ensure that users can retrieve files with the Self-Service Recovery feature, you should perform a full backup of the content as soon as possible when you upgrade Metalogix SharePoint Backup.

FAST Search Service Considerations

Here are a few things to consider about the FAST search service:

- Metalogix SharePoint 2010 has limited support for SharePoint FAST Search, this is a result of the FAST search being installed in an external server on which the Backup service cannot be installed. As a result only the following features are supported for SharePoint 2010:
  - Search service application Administration database
  - Search service application Crawl database
  - Search Service application Property database

  SharePoint Backup is also able to backup and restore the metadata related with Content indexes for these Databases.
- Metalogix SharePoint 2013 has a merged version of the SharePoint Search and FAST Search Server for SharePoint search engines. As a result, SharePoint Backup is able to cover backup and restores of the following search Databases:
  - Search Administration database
  - Analytics Reporting database
  - Crawl database
  - Link database

  Here, the entire search service is part of the Backup product itself.

Farm backup and restore considerations

Here are a few things to consider about performing a farm backup and restore:

- If a SharePoint server with the Backup Service installed also hosts Microsoft SQL Server, you must ensure that the SQL Server VSS Writer component starts properly. If it does not, the Backup Service cannot back up the server components. The VSS Writer must start properly even if the SQL Server is not used as part of the farm.
- If the SharePoint farm includes multiple search services that are both running simultaneously, the servers that host the services do not properly register them with the VSS Writer. You should remove the duplicate search services from your environment to let the VSS Writer connect to the servers.
- Farm backup does not back up all of the SharePoint components. The WSS_Logging database does not appear in the list of selectable components, and it cannot be backed up by Metalogix SharePoint Backup.
- If you restore a database that uses alternative authentication, you may need to manually restore the database connection with your SharePoint farm.
- When you perform a farm backup, the Backup Service contacts the SQL Servers that host both the repository database and the SharePoint content databases. If any SQL Server is unavailable or has not yet finished startup, or if one of the databases is not yet available, the farm backup may fail. Ensure that all of the SQL Servers have completely started, then repeat the backup.
- Metalogix SharePoint Backup relies on VSS to perform farm backups. Due to restrictions in the way that VSS works, only one VSS differential backup of a given component can be in use at any given time. If a different product performs a full backup with VSS, the existing differential backup is no longer valid.
- If you use a scheduled farm backup with differential backups to back up a SharePoint component and then use another product that uses VSS to perform a backup of the same component, Metalogix SharePoint Backup detects the use of the other product and automatically performs a full backup instead of a differential backup.
- If you use another product that supports differential backups with VSS and you use Metalogix SharePoint Backup to perform a farm component backup, you may interfere with the other product. If you use multiple products that use VSS to perform backups, you should only use full backup farm backups in Metalogix SharePoint Backup.
- If you select particular components or component types for a farm backup operation, then add a new component to your SharePoint farm, Metalogix SharePoint Backup does not add the component to an existing backup job automatically. If you add a content database, Web application, configuration database, or service application to the farm, you should create a new farm backup operation to back up the new component. If the operation includes all farm components, the backup includes new components automatically.
- If the certificates for your SharePoint farm are configured to prohibit certificate export or if certificate export requires a password, Metalogix SharePoint Backup is unable to back the certificates up.
- If you enable database mirroring in SharePoint and SharePoint uses the mirrored database, farm component backups do not include SharePoint search components. If this occurs, Metalogix SharePoint Backup displays a warning when the backup occurs.
- It is important to note that restoring a backup of a SharePoint farm and its objects can only be done on the same version of SharePoint from which the Backup was taken.

Learning about the requirements

You can install Metalogix SharePoint Backup on any computer that meets or exceeds the hardware, software, and permission requirements. When you install multiple components on a single host computer, the computer should meet or exceed all of the requirements for the components.

Consider the following requirements when you install Metalogix SharePoint Backup in a typical environment:

- Learning about the SharePoint requirements
- Learning about the Management Console requirements
- Learning about the Management Service requirements
- Learning about the Backup Service requirements
- Learning about the Self-Service Recovery feature requirements
- Learning about the Management Service permission requirements

SharePoint Requirements

To use Metalogix SharePoint Backup, you must have at least one Microsoft SharePoint farm installed and configured. The farm can be any of the following versions:

- Microsoft SharePoint Foundation 2010
- Microsoft SharePoint Server 2010
- Microsoft SharePoint Foundation 2013
- Microsoft SharePoint Server 2013
- Microsoft SharePoint Server 2016

TIP	To perform a farm component backup, your SharePoint farm must have SharePoint 2010, 2013, or 2016 installed.

Management Console requirements

You can install the Metalogix SharePoint Backup Management Console alone or in concert with the other components.

TIP	If you install the Management Console with any other Metalogix SharePoint Backup components, you must use a version of Windows Server. Windows Vista, or Windows 7, Windows 8, Windows 8.1 can only host the Management Console.

The computer where you install the Management Console must meet the following minimum requirements:

- 2.0 GHz or faster CPU.
- 2 GB or more memory. The required memory size varies, depending on the size of the SharePoint objects you back up.
- 50 MB free hard disk space.
- Microsoft .NET framework 4.0.
- Monitor capable of displaying 16-bit or more colors at a resolution of 1024 X 768 or higher.
- One of the following Windows versions:
    - Windows Server 2008 SP2

- Windows Server 2008 R2
- Windows Server 2012
- Windows Server 2012 R2
- Windows Vista SP2
- Windows 7
- Windows 8
- Windows 8.1

The Management Console user does not need to be a member of the local administrators group.

Management Service requirements

You install the Metalogix SharePoint Backup Management Service automatically when you install the other components. The computer that hosts the Management Service always hosts the Metalogix SharePoint Backup Management Console.

The computer where you install the Management Service must meet the following minimum requirements:

- 2.0 GHz or faster CPU.
- 2 GB or more memory. The required memory size varies, depending on the size of the SharePoint objects you back up.
- 50 MB free hard disk space.
- Microsoft .NET framework 4.0.
- Monitor capable of displaying 16-bit or more colors at a resolution of 1024 X 768 or higher.
- One of the following Windows versions:
  - Windows Server 2008 SP2
  - Windows Server 2008 R2
  - Windows Server 2012
  - Windows Server 2012 R2

In addition, the Management Service stores preferences and other information in a repository database. You specify the Microsoft SQL Server host for the database when you install the Metalogix SharePoint Backup components. The SQL Server host that you select should be one of the following:

- Microsoft SQL Server 2005 SP3
- Microsoft SQL Server 2008 SP1
- Microsoft SQL Server 2008 R2
- Microsoft SQL Server 2012
- Microsoft SQL Server 2014

Backup Service Requirements

Install the Backup Service on every SharePoint Web Front End (WFE) server and database server in the SharePoint 2010, 2013, or 2016 farms that you back up.

Hardware and Software Requirements for the Backup Service

Any server that hosts the Backup Service must meet the following requirements:

- 2.0 GHz or faster CPU.
- 2 GB or more memory. The required memory size varies, depending on the size of the SharePoint objects you back up.
- 50 MB free hard disk space.

- Microsoft .NET framework 4.0.
- One of the following Windows versions:
  - Windows Server 2008.
  - Windows Server 2008 R2.

Permission Requirements for the Backup Service User Account

When you install the Backup Service, you specify a user account that the Backup Service uses to access the farm.

The Backup Service account that you specify requires the following permissions to perform backups and restores:

Windows permissions

The Backup Service account must have write permissions to the installation folder on the WFE and to the folder where you store backup sets. To perform Farm Backups of SharePoint 2010, 2013, or 2016 farm. Tthe Backup Service account must also be a member of the local administrators group on the server that hosts the Backup Service.

On SharePoint 2010, 2013, or 2016 farms, the Backup Service user account must also be able to perform Microsoft Volume Shadow Copy Service (VSS) operations on the computer that hosts the Backup Service. Normally, members of the local administrators group have these permissions, but they can be removed by a group policy setting. If your group policy settings make changes to the local administrator group privileges, you should ensure that the Backup Service user has the following privileges:

- Act as part of the operating system
- Backup files and directories
- Create a token object
- Log on as a service
- Manage auditing and security log
- Restore files and directories
- Take ownership of files and other objects

SharePoint permissions

If the SQL Server is a part of the farm, the Backup Service account must be a member of the SharePoint farm administrators group.

If the farm uses a standalone SQL Server, there is no SharePoint farm administrators group on the server.

SQL Server permissions

Metalogix SharePoint Backup needs access to all SharePoint databases to perform farm content backups.

You should manually grant these permissions for the Admin Content and SharePoint Config databases to the Backup Service user account before you install the Backup Service.

For all other databases, you can manually grant these permissions, or the Backup Service timer job can grant the permission automatically.

When it runs, the Backup Service creates a SharePoint timer job. The job is named Metalogix SharePoint Backup Confirm Backup Service Permissions. The Backup Service queues the job immediately when it creates the job. In addition, the timer job is scheduled to run at the beginning of every hour. Depending on

the state of your timer job queue, execution of the timer job may be delayed. If desired, you can use the SharePoint Central Administration page to check the job status.

The timer job assigns the db_owner role on every SharePoint database to the Backup Service user account that you specify. In addition, the timer job assigns the Full Control policy for every Web application in the farm to the Backup Service user account.

The timer job ensures that the Backup Service can access every SharePoint database to perform backups. Normal SharePoint operations, including creating a new Web application or a service application, can create new databases. If you disable the job, you must manually assign permissions for the new databases or backups can fail.

When you perform an operation that creates a new database, you can use the SharePoint 2010, 2013, or 2016 timer job controls to manually start the job. You can also wait until the start of the next hour for the job to run on schedule.

Self-Service Recovery requirements

The Metalogix SharePoint Backup Self-Service Recovery feature lets site collection administrators restore the backed up content for which they are responsible.

To restore content, the user must currently be a site collection administrator. In addition, the user must have site collection administrator privileges for the content before the backup occurs.

You can deploy the feature to any Web Front End (WFE) in your SharePoint farm. When you configure Metalogix SharePoint Backup for your farm, you can automatically deploy the feature to the farm.

Management Service permission requirements

The user account that you specify for the Metalogix SharePoint Backup Management Service must have the following permissions:

- Must be a local administrator on the computer that hosts the Management Service.
- Must be a member of the db_owner role for the repository database.
- To perform farm backups of SharePoint 2010, 2013, or 2016 farms, the account must be a member of the SharePoint farm administrators group.

You specify the database to use as the repository database when you install the Management Services.

In addition, when you install Metalogix SharePoint Backup, the installer also assigns the permissions required to access the Microsoft Volume Shadow Copy Service (VSS) to the farm account and to the account that you specify for the Backup Service.

For more information about the VSS permissions, see the Microsoft article *Security Considerations for Requesters* at: http://msdn.microsoft.com/en-us/library/aa384604(VS.85).aspx.

Installing and deploying Metalogix SharePoint Backup

You can install and deploy Metalogix SharePoint Backup in any network environment. You must have at least one Microsoft SharePoint farm deployed to use Metalogix SharePoint Backup.

- Learn about the architecture and components.
- Review the requirements.
- View the installation instructions.

Installing Metalogix SharePoint Backup

Metalogix SharePoint Backup helps you to back up and restore the content of SharePoint 2010, 2013, and 2016 farms, as well as the farm components that make up your SharePoint 2010, 2013, and 2016 farms. Before you can use Metalogix SharePoint Backup, you must select one or more computers to host the product components and install it on those computers. The computers that host the components must meet minimum requirements for the components that you install. For more information about the requirements, see the section titled Learning about the requirements.

For more information about installing Metalogix SharePoint Backup on a "standalone" SharePoint server or a "basic install" of SharePoint 2010, 2013, or 2016, see the section titled Installing on a standalone SharePoint server.

TIP	The account that you use to install Metalogix SharePoint Backup must not have Windows User Account Control (UAC) enabled when you install. If UAC is enabled, the installation cannot finish successfully.

Use the Metalogix SharePoint Backup installation kit to install the product. You can install Metalogix SharePoint Backup on any computer that meets or exceeds the product requirements.

When you download the installation kit from the Metalogix Web site, double click on the following .exe file to begin installation:

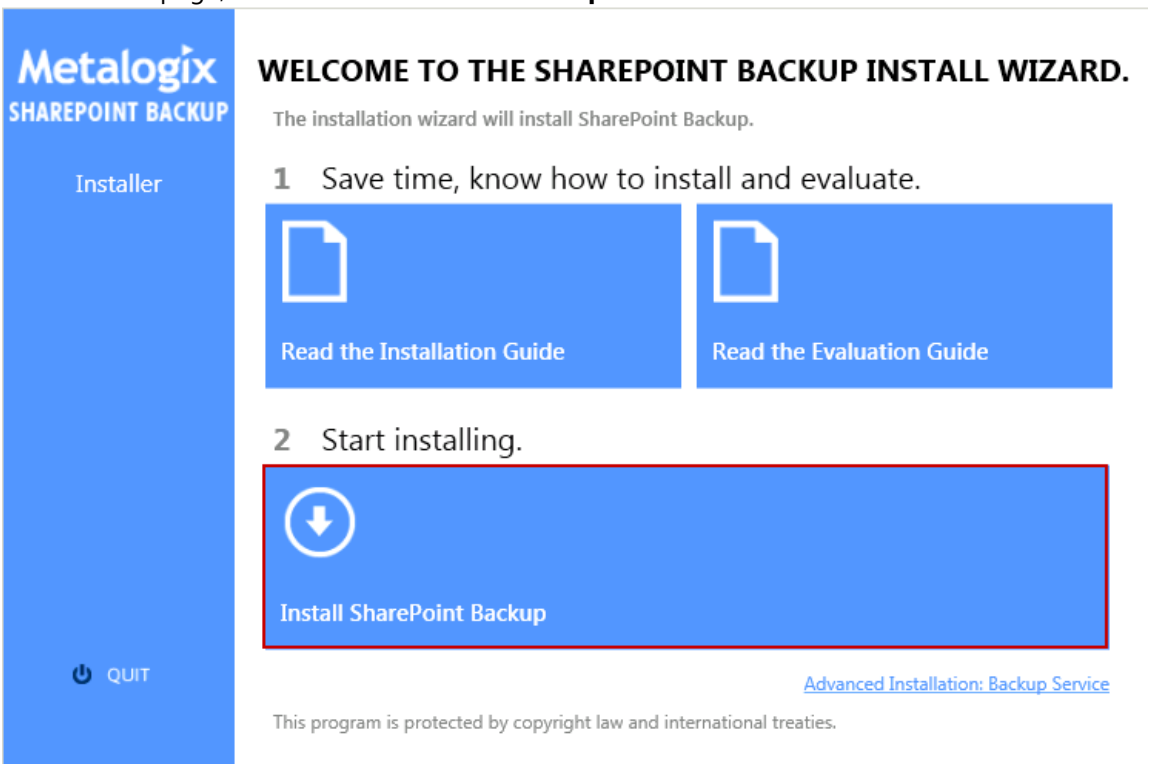
MetalogixBackupInstallationKit.exe

To install all of the Metalogix SharePoint Backup components on a single computer

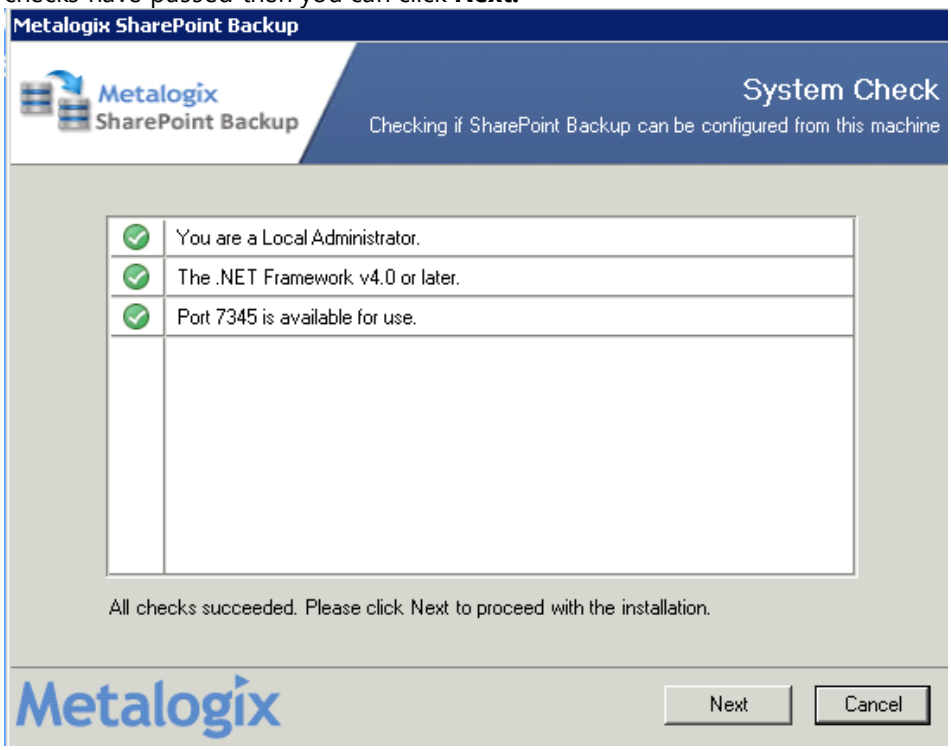
1. Log on to the computer where you want to install Metalogix SharePoint Backup. You should use a user account that is a member of the local administrators group on the computer. In addition, the account that you use must have the sysadmin role assigned for the SQL Server instance that hosts the Metalogix SharePoint Backup repository database.
2. ***If you downloaded the Metalogix SharePoint Backup Installation Kit***, use the following steps. ***If you obtained the installation kit on a disc***, continue with step 3.
   a. Use Windows Explorer to locate the installation kit file, and then double-click the file.
   b. Continue to step 4.
3. ***If you obtained the Metalogix SharePoint Backup Installation Kit on a disc***, use the following steps:
   a. Insert the disc into your computer.

b. ***If the setup program does not start automatically***, double-click Metalogix.SharePointBackup.BootStrapper.exe in the installation disc.

4. On the Install page, click **Install SharePoint Backup**.

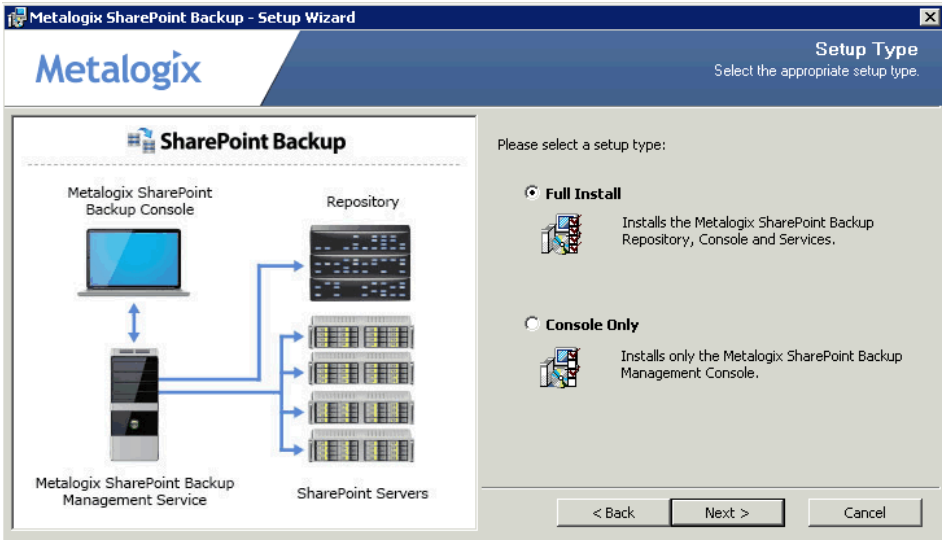


5. The Metalogix SharePoint Backup installation wizard will open and automatically run a System Check. Once the check has completed, you will either have to address the checks that did not pass, or if all checks have passed then you can click **Next.**

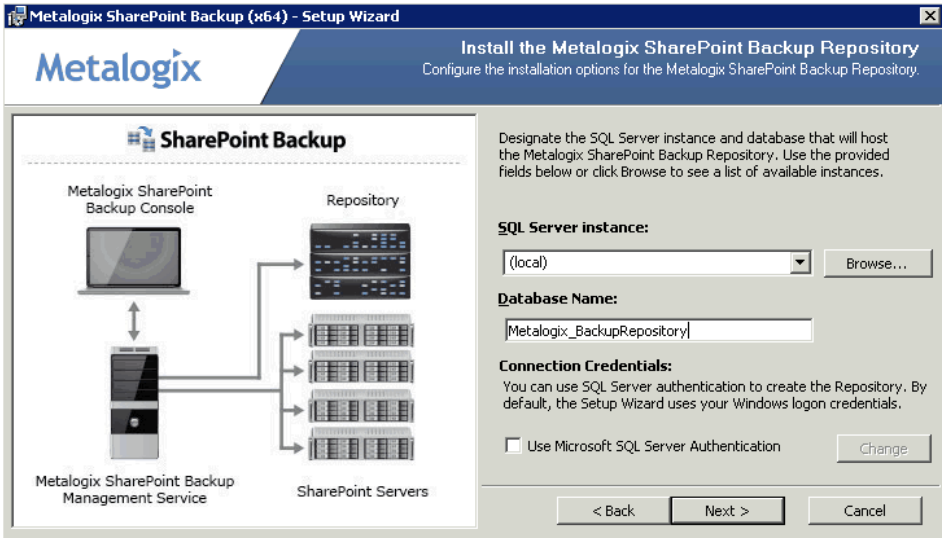


6. You will now see the Welcome page, click **Next**.

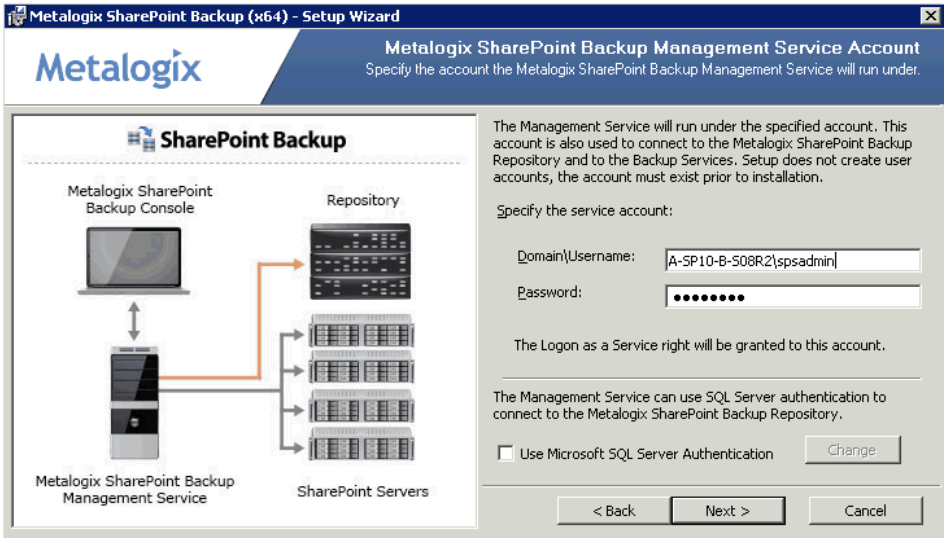
7. On the License Agreement page, review the terms of the license agreement, and then click **I accept the terms in the license agreement**, then click **Next**.
8. On the Destination Folder page, select a location to install the components, and then click **Next**.
9. On the Setup Type page, click **Full Install** to install all Metalogix SharePoint Backup components on a single computer or click **Console Only** to install only the Metalogix SharePoint Backup Management Console, and then click **Next**.



10. ***If you chose to install all of the components and the Microsoft firewall is enabled on the host computer,*** the Microsoft Firewall Enabled page reminds you to open the required ports for the Management Service. Click **Continue**.
11. ***If you chose to install all of the components,*** search for and then select a SQL Server instance and database name for the repository database. You can also specify the credentials that the Setup wizard uses to connect to the SQL Server. Click **Next**.



12. In the Metalogix SharePoint Backup Management Service Account page, specify SQL Server Authentication credentials that the Management Service uses to connect to the repository database, and then click **Next**.



13. In the Ready to Install the Program page, click **Install**.
14. In the Setup wizard Completed page, click **Finish**. If you leave **Launch Console** selected, the Metalogix SharePoint Backup Management Console starts.

Installing on a standalone SharePoint server

When you install Microsoft SharePoint, you can choose to perform a "standalone" or basic install on a single server that hosts all of the SharePoint components. The installer optimizes the component settings on a standalone SharePoint farm for the standalone environment. If you install Metalogix SharePoint Backup on a standalone farm, you must make certain changes to these settings to give Metalogix SharePoint Backup access to both the farm components and its own components.

TIP	When you install on a multi-server farm, you do not need to make these changes. The changes are required only for standalone or basic installations of SharePoint 2010, 2013, or 2016.

You must make these changes to your standalone SharePoint server before you install Metalogix SharePoint Backup. Until you make the changes, Metalogix SharePoint Backup cannot complete the Configuration wizard and install the Backup Service.

Backup Installation on SharePoint 2010 or 2013 Farms

Before you install Metalogix SharePoint Backup on a standalone SharePoint 2010, 2013, or 2016 server, you should make the following changes to your SharePoint farm in the SQL Server Configuration Manager:

- Enable TCP/IP for the SQL Server instance. The instance name is *<server name>* \SHAREPOINT.
- Enable Named Pipes for the SQL Server instance.

In the Services Control Panel, do the following:

- Set the startup type of the SQL Server Agent to Automatic.
- Set the startup type of the SQL Server Browser to Automatic.

- Start or restart the SQL Server Agent.

You can then install Metalogix SharePoint Backup and run the Configuration wizard. For more information about installing, see the section titled Installing Metalogix SharePoint Backup.

When you have completed the Configuration wizard, immediately quit the Metalogix SharePoint Backup Management Console. In the Services Control Panel, you should change the login account for the SharePoint VSS Writer service to LocalSystem then restart the service.

Before you install Metalogix SharePoint Backup, the SharePoint VSS Writer service runs as Local Service. As part of the Configuration wizard, Metalogix SharePoint Backup issues the command stsadm registervsswriter, which changes the account. When you set the service to run as LocalSystem, you are returning the service to its original settings.

After making the changes, you can use Metalogix SharePoint Backup normally.

Installing the Backup Service manually

When you add a farm to your Metalogix SharePoint Backup installation, the Configuration wizard lets you install a copy of the Backup Service on the SharePoint Web front end (WFE) servers and database servers.

If your disaster recovery planning includes farm backups of SharePoint 2010 farms, you must install the Backup Service on every WFE and every database server in your SharePoint farm.

When you use the Configuration wizard, you must install the Backup Service on at least one WFE.

TIP	The first Backup Service that you install must always be on a WFE server.

You should normally use the Configuration wizard to install the Backup Service on every WFE and every database server in your SharePoint farm.

You can also use the Metalogix SharePoint Backup Management Console to install the Backup Service on WFE hosts in the SharePoint farm. In addition, if you add a WFE or a database server to your farm, you can use the Management Console to install the Backup Service on the new server.

Finally, you can use the Metalogix SharePoint Backup installer to install the Backup Service on the WFE or database server directly. To do so you must be able to log in to the server with an account that is a member of the administrators group on the server.

When you install a Backup Service, you select the WFE server or database server to install on. You also specify the user name and password that the Backup Service uses to run. The user account that you specify must have specific permissions for the farm. For more information about the permissions that the Backup Service user account requires, see the section titled Backup Service Requirements.

Backup Service Permission Requirements

The account you use as the service account for the Backup Service must have the following permissions:

- Member of the local administrators group on the WFE host.
- Member of the farm administrators group in the SharePoint farm.
- Must have at least db_owner permissions for all SharePoint content databases, including the admin content and SharePoint config databases.

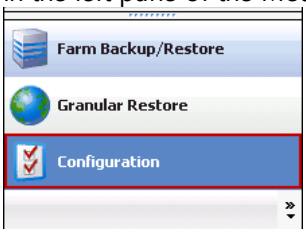
TIP	***If the account that you use is not a SQL Server system administrator***, you should use the SQL Server Management Studio to grant the account access to the repository database that you specified when you installed Metalogix SharePoint Backup. The default database name is MetalogixSPBackupRepository.

Installing the Backup Service Using the Management Console

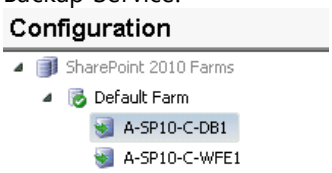
You use the Install Backup Service dialog box to install the Backup Service on a WFE or a database server.

To install the Backup Service on a WFE or a database server with the Management Console

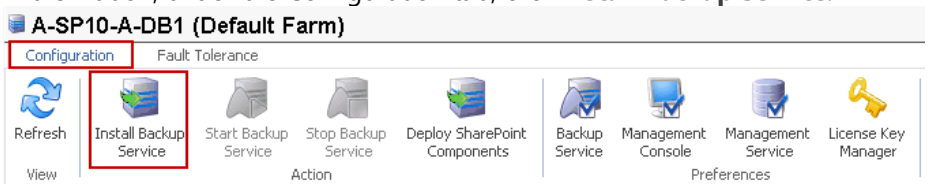
1. In the left pane of the Metalogix SharePoint Backup Management Console, click **Configuration**.



2. In the Configuration pane, click the name of the WFE or database server where you want to install the Backup Service.



3. In the ribbon, under the Configuration tab, click **Install Backup Service**.



4. In the Install Backup Service dialog box, enter the credentials of the account that the Backup Service should use. Specify the user name in <*domain name*>\<*user name*> format.

5. Click **Install**
6. In the Information dialog box, click **OK**.

Installing the Backup Service Using the Installer

To use the Metalogix SharePoint Backup installer to install the Backup Service on a WFE or a database server, you must first log in to the server with an account that is a member of the local administrators group.

To use the Metalogix SharePoint Backup installer to install the Backup Service

1. ***If you downloaded the Metalogix SharePoint Backup Installation Kit***, use the following steps. ***If you obtained the installation kit on a disc***, continue with step 3.
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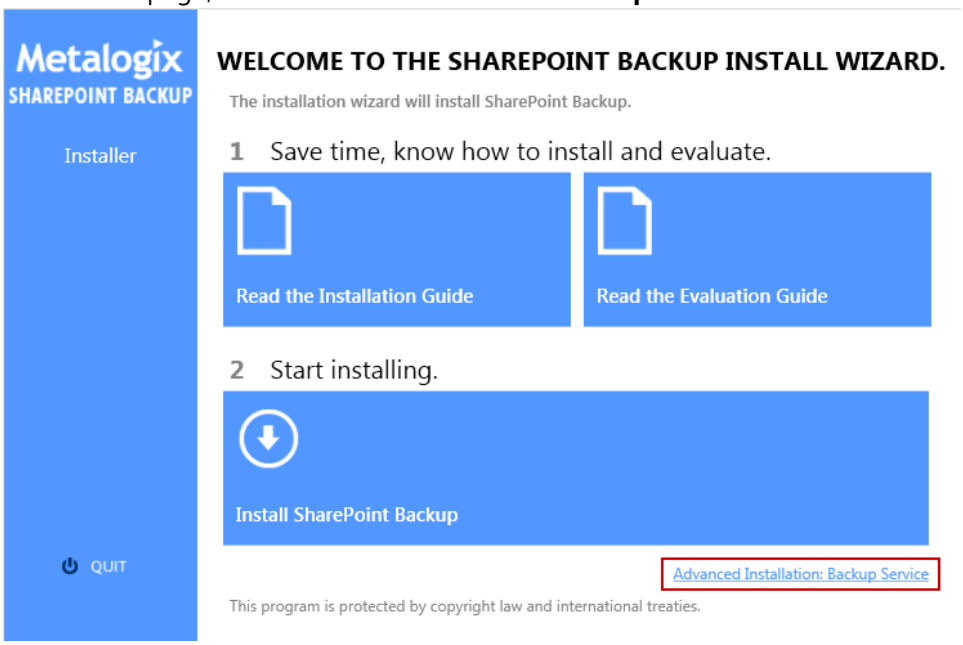
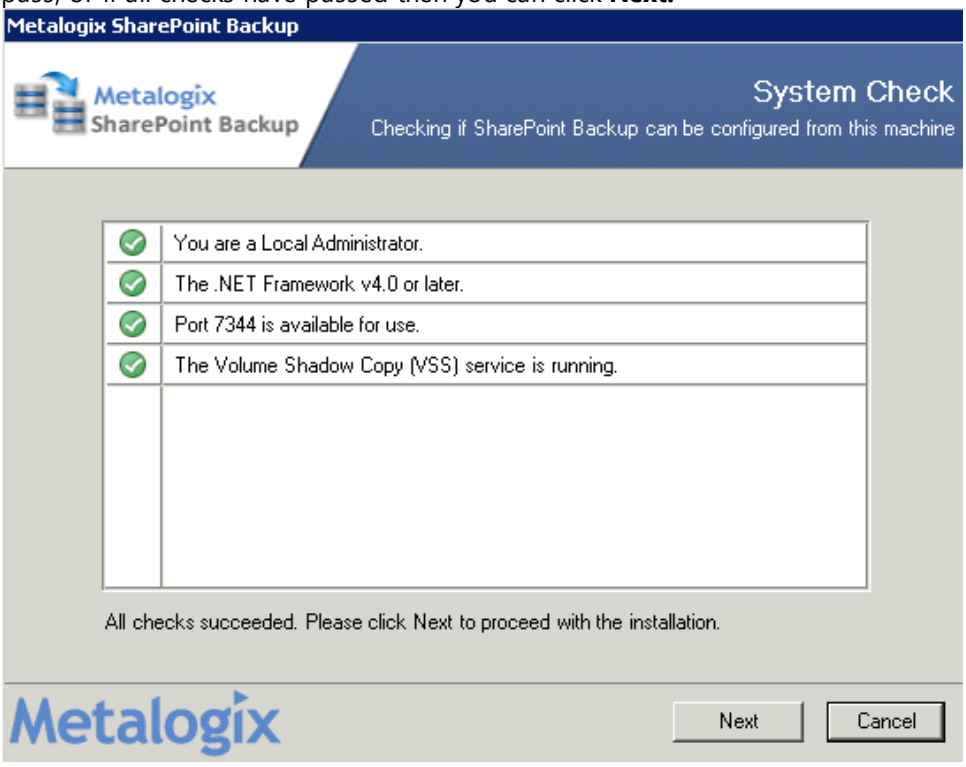
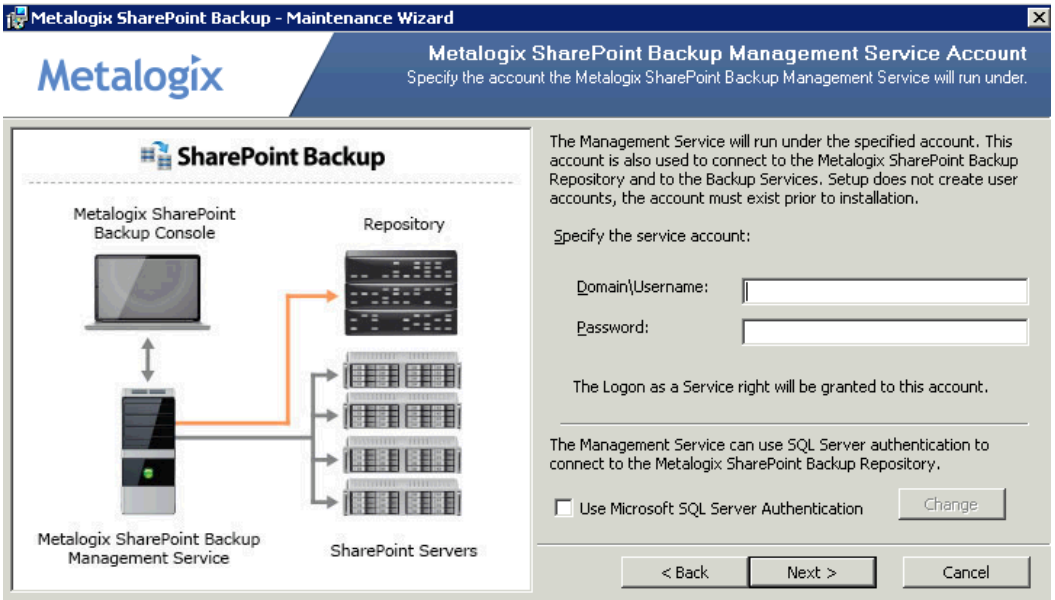
    c. Insert the disc into your computer.
2. ***If the setup program does not start automatically***, double-click Metalogix.SharePointBackup.BootStrapper.exein the installation disc.
3. In the Install page, click **Advanced Installation: Backup Service**.



4. The Metalogix SharePoint Backup installation wizard will open and automatically run a System Check. Once the check has completed, you will either have to address the checks that did not pass, or if all checks have passed then you can click **Next.**



5. The Setup wizard Welcome page, will open, click **Next**.
6. On the License Agreement page, read the license agreement, then if you agree with the terms of the license, click **I accept the terms in the license agreement**, then click **Next**.
7. On the Destination Folder page, you can click **Change** to specify a custom folder. Click **Next**.
8. On the Metalogix SharePoint Backup Service Account page, enter the credentials of the account that the Backup Service should use. Specify the user name in<*domain name*>\<*user name*> format. Click **Next**.



8. On the Service Location page, enter the computer that hosts the Metalogix SharePoint Backup Management Service. You can enter the IP name, NetBIOS name, or IP address of the host. Click **Next**.
9. On the Ready to Install the Program page, click **Install**.
10. On the Setup wizard Completed page, click **Finish**.

Managing licenses

Metalogix SharePoint Backup activates your license key during its installation by contacting a Metalogix server. Metalogix SharePoint Backup will periodically refresh the activation as it runs.

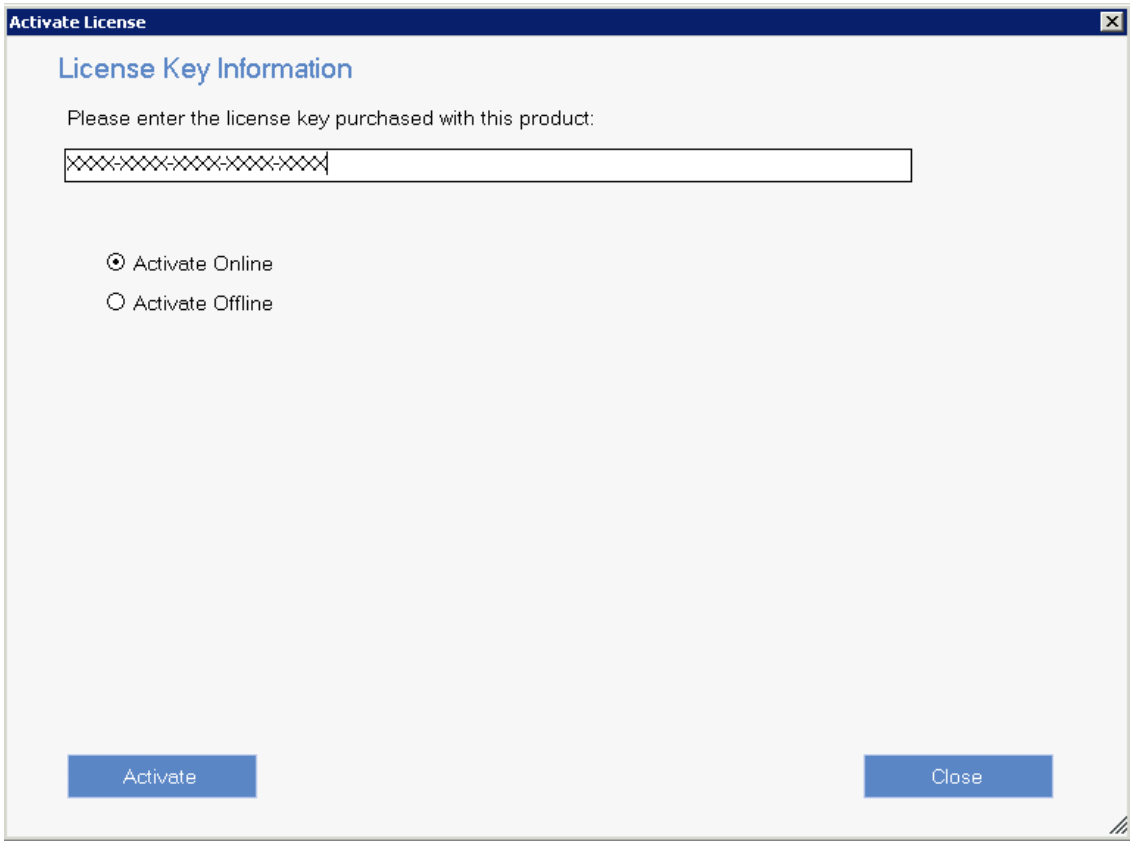
For customers without an Internet connection or who want to review the information that is being sent to Metalogix, offline activation is available. Installations using offline activation must be manually refreshed every 365 days.

Your license is based on the number of servers that you want to back up within your farms. If the server does not have a valid license, Metalogix SharePoint Backup does not collect data from that server.

Activating a License Key

The first time that you open the SharePoint Backup Management Console, you will be prompted to activate a license key. Follow these steps in order to activate your license key:

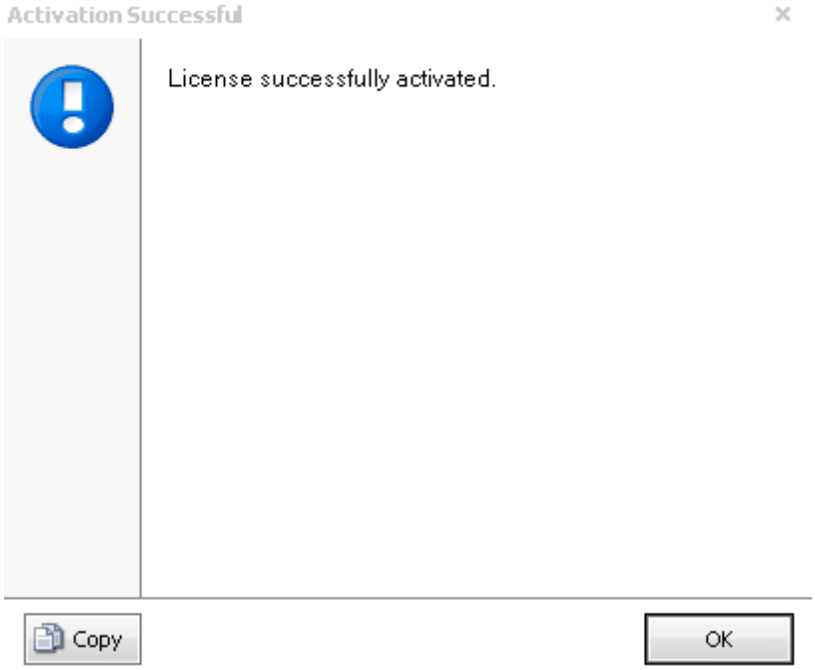
1. Enter the license key with which you wish to Activate the product.
2. If you want to activate the license online, select **Activate Online**, and then click **Activate**. If you want to activate the license offline, select **Activate Offline** and follow the steps in the Activate Offline section.



Offline activation is available for customers without an Internet connection or who want to review the

information sent to Metalogix. Note that installations using offline activation must be manually refreshed every 365 days.

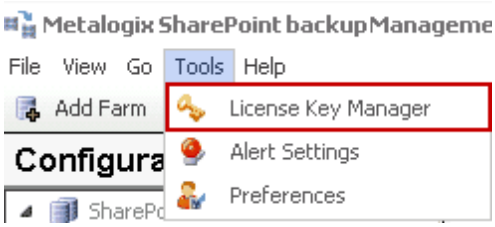
3. Click **Activate**. Metalogix SharePoint Backup displays a message with the status of your activation.



How do I view the licensed servers?

You use the Manage Licenses dialog box to view the servers that have licenses assigned to them. In the Manage Licenses dialog box, servers with licenses assigned have selected check boxes.

To view your licensed servers, open the Management Console, and then click **Tools** > **License Key Manager**.



The Manage Licenses dialog box will open. You can now choose to manage your licenses or activate new ones.

Updating a license key

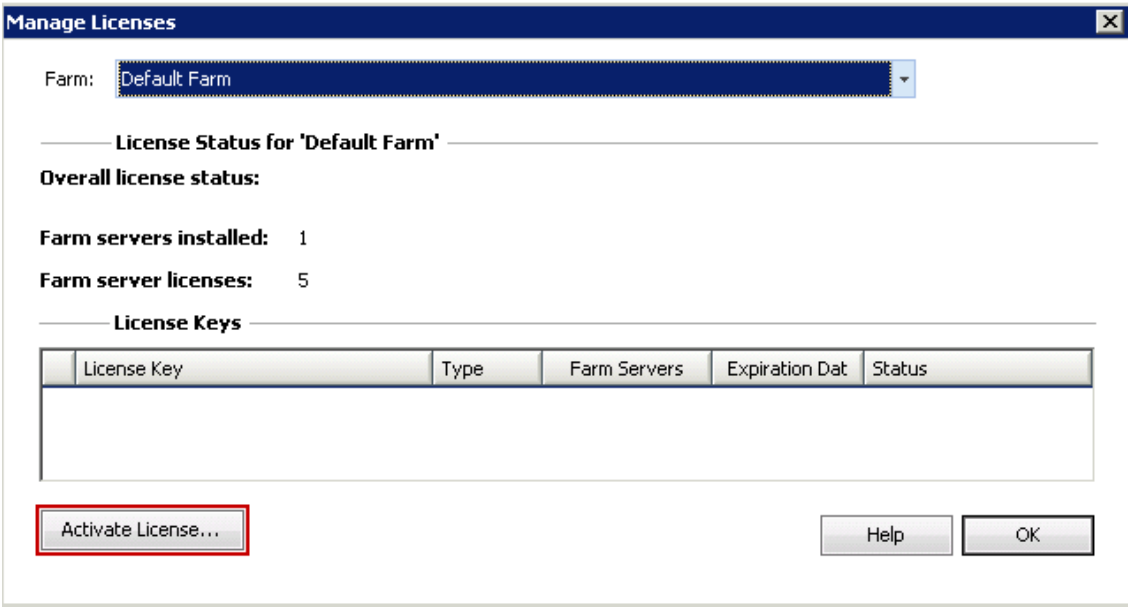
The Activate License dialog box lets you enter your new Metalogix SharePoint Backup license key. You must have a valid license key equal to or greater than the number of SharePoint servers you want to monitor.

How do I update or add a license?

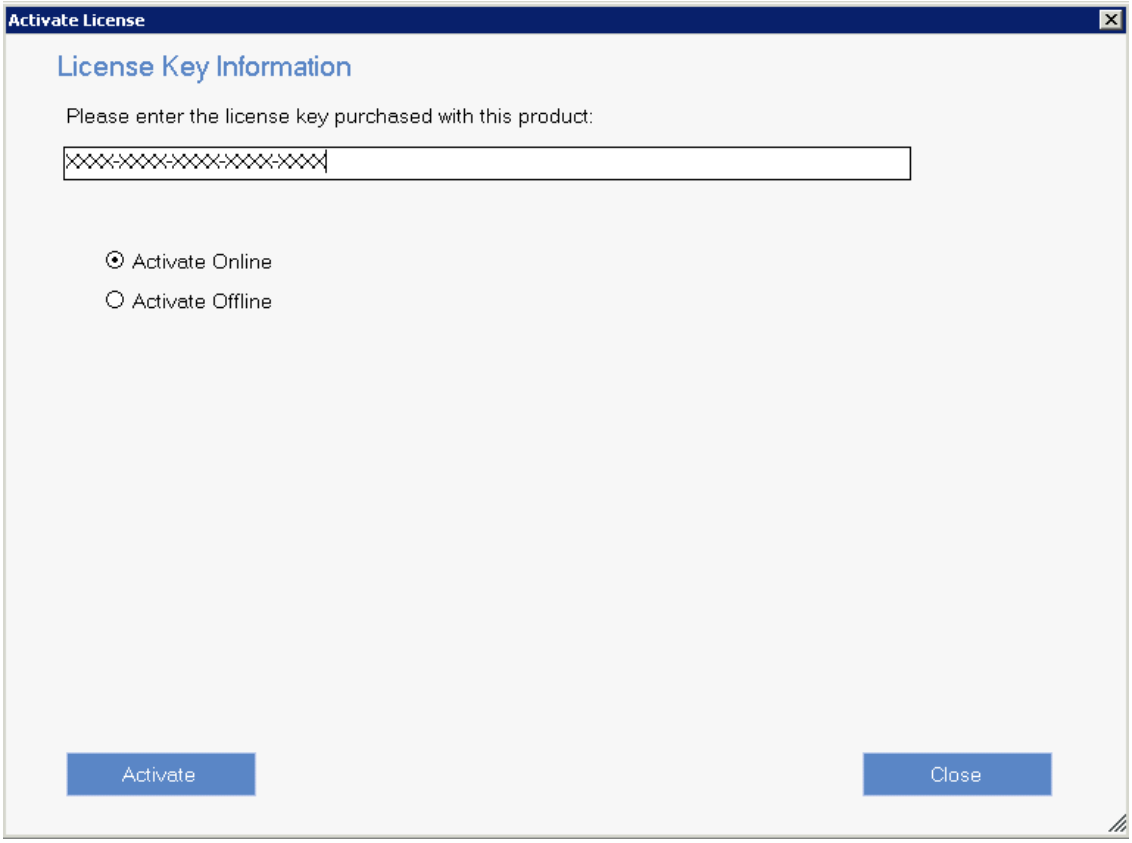
You may need to update a license when you increase the number of servers you want to monitor and you receive another license from Metalogix.

To update a license

1. In the Management Console, click **Tools** > **License Key Manager** or click **Help** > **Activate**.
2. In the Manage Licenses window, click **Activate License**.

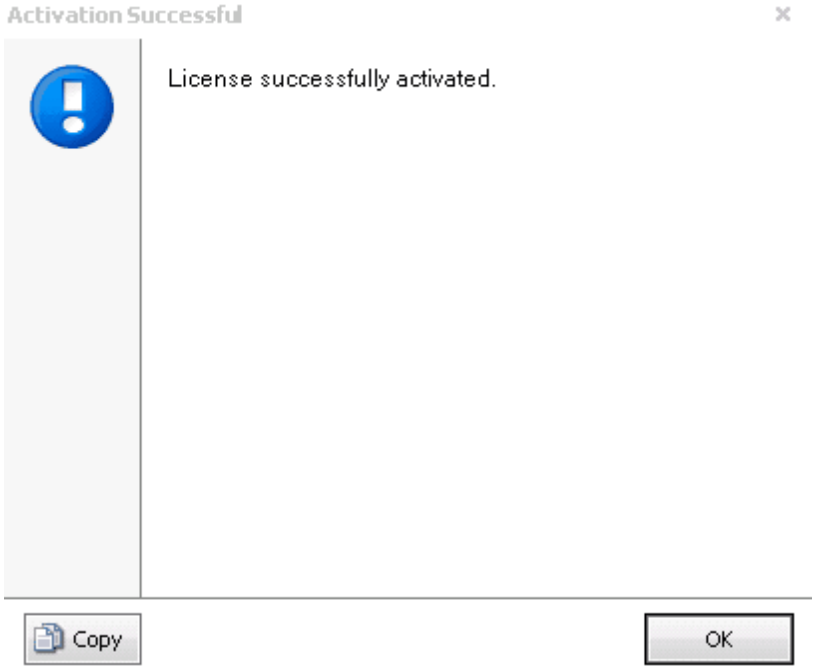


3. In the Activate License dialog box, enter the license key.
4. If you want to activate the license online, select **Activate Online**, and then click **Activate**. If you want to activate the license offline, select **Activate Offline** and follow the steps in the Activate Offline section.



Offline activation is available for customers without an Internet connection or who want to review the information sent to Metalogix. Note that installations using offline activation must be manually refreshed every 365 days.

5. Click **Activate**. Metalogix SharePoint Backup displays a message with the status of your activation.



Upgrading Metalogix SharePoint Backup

You can upgrade your existing Metalogix SharePoint Backup deployment to the current version to access the new and improved features available.

You can upgrade Metalogix SharePoint Backup version 5.0 and later to this version.

TIP	This version of Metalogix SharePoint Backup cannot upgrade backup sets from versions earlier than 5.0. If you used a version earlier than 5.0 to create a backup set, contact Metalogix Technical Support at http://metalogix.com/support for assistance to upgrade the backup set

Upgrading from version 5.0 and later

NOTE: If you are upgrading from Version 5.0 or 5.1 of SharePoint Backup to Version 6.0 or higher, you must follow the instructions available in the Upgrade Scenario Guide.

The following steps will assist you in upgrading your edition of SharePoint Backup from version 4.0 and later versions.

1. Ensure the computers on which you want to upgrade Metalogix SharePoint Backup meet or exceed the product requirements. See the following topics:
   - Learning about the requirements
   - SharePoint Requirements
   - Management Console Requirements
   - Management Service Requirements
   - Backup Service Requirements
   - Self-Service Recovery feature Requirements
   - Management Service Permission Requirements
2. Ensure that the account that you use to log onto the computers that host the Metalogix SharePoint Backup components have administrator privileges on the repository database.
3. Identify the upgrade path your environment requires. For more information, see What upgrade options are available? section.
4. Temporarily disable any scheduled jobs and allow any currently running or queued backup/mount and link/restore operations to complete.
5. ***If you deployed the Metalogix SharePoint Backup Self Service Recovery Web part solution***, remove the Web part and use the SharePoint administration tools to retract the solution package.
6. Close all open applications on the Metalogix SharePoint Backup component hosts.
7. Ensure that the .NET framework 4.0 is running on the target computer.
8. Upgrade your installation to Metalogix SharePoint Backup using the appropriate path. For more information, see the Upgrading From Version 5.0 and Later section.
9. ***If you plan to use farm backups for your SharePoint 2010, 2013, or 2016 farm,*** use the Management Console to deploy additional Backup Service instances on every Web front end (WFE) and database server in the farm. For more information about this installation, see the section titled Installing the Backup Service Manually.

10. ***If you plan to use the new Self-Service Recovery feature,*** use the Management Console to deploy the Self-Service Recovery components manually. For more information about this installatiosn, see the section titled Installing the Self-Service Recovery feature.

Available Upgrade Options

Metalogix SharePoint Backup includes the following components:

- Management Console
- Repository database
- Management Service
- Backup Service

The type of upgrade that you need to perform depends on your environment. The following table helps you choose between a full or custom upgrade path.
After the upgrade is complete, you must restart the Management Console.

Environment	Upgrade Strategy	Description
Simple environment, where the Management Console, the repository database, and the Management Service all reside on the same computer	Full	You can use the installer to upgrade a simple environment. See Upgrading a Full Insatllation
Multiple Management Console instances in an environment.	Custom	An installation with multiple Management Console instances requires both a Full Install and Console-only installations to upgrade. See Upgrading a Full Installation? and Performing a Custom Upgrade.
Manually deployed Backup Service	Custom	You can remotely or manually upgrade manually installed Backup Service instances. See Upgrading a Deployed Backup Service. The installed Backup Service should always be the same version as the Management Service and Management Console.

How do the Backup Service upgrade paths differ?

Upgrading the Backup Service may slow the normal operations of the SharePoint servers that host the Backup Service. You should consider upgrading previously deployed Backup Service installs off-hours during a single time period according to your corporate change policies. The first time that you start the Management Console when the upgrade is complete, the Management Console prompts you to remotely upgrade a previously deployed primary Backup Service automatically.

See the section titled Upgrading a Deployed Backup Service?

If you remotely deployed the Backup Service instances, the first time that you run the Management Console after the upgrade is complete, the Management Console prompts you to upgrade the primary Backup Service. This version of the Management Console and Management Service for SharePoint Backup require the same version of the Backup Service. If you do not upgrade when prompted no backup or restore operation can occur.

If you manually deployed the Backup Service, you can remotely deploy the upgrade. You can also run the Backup Service setup program on the computer that hosts the Backup Service to manually upgrade the service.

Upgrading a Full Installation

You can use the full install to upgrade your installation to this version of Metalogix SharePoint Backup if you have a centralized deployment or if you are upgrading from a trial installation. This process assumes you can upgrade all deployed Backup Service instances during the same time period.

In a full installation, all of the Metalogix SharePoint Backup management components are installed on the same physical computer. These components include the following:

- Repository database
- Management Service
- Management Console

Once you perform the upgrade, scheduled backups do not run successfully until you upgrade the Backup Service instances. After you upgrade the management components, you can use the Management Console to upgrade the Backup Service instances.

To perform a full install upgrade

1. Perform a full install to upgrade the management components to the new version. When prompted during the install, verify the name of the repository database. For more information about installing, see the section titled Installing Metalogix SharePoint Backup.
2. Upgrade all previously deployed Backup Service instances. See the section titled Upgrading a Deployed Backup Service?

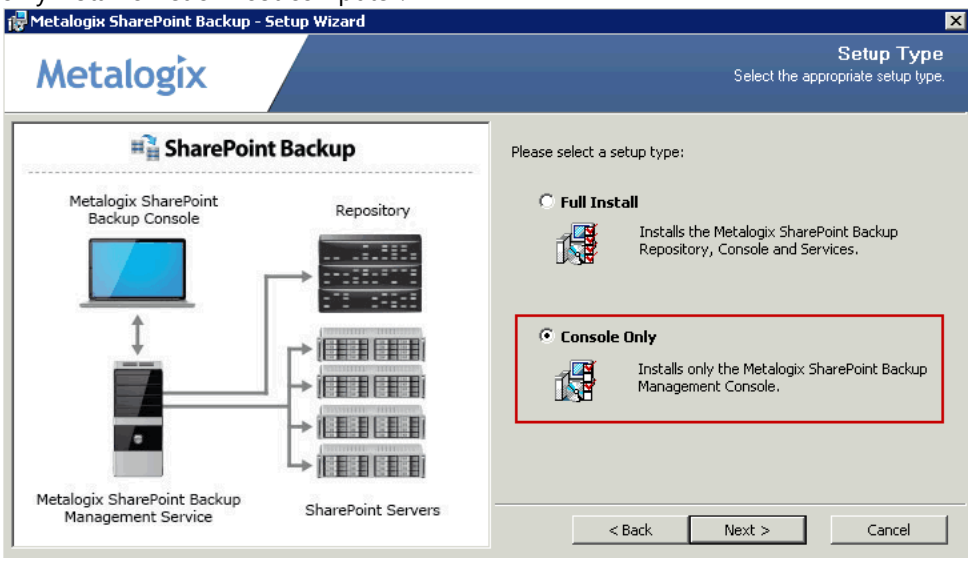
Performing a Custom Upgrade

When you upgrade a custom environment, you first perform a full installation to upgrade the core components. After this update is complete, you can use the Console-only install to upgrade any additional Management Console installations that share a single Management Service and repository database. Finally, you upgrade all deployed Backup Service instances.

To perform a custom upgrade:

1. Perform a full install to upgrade the management components to the new version. When prompted during the install, verify the name of the repository database. For more information about installing, see the section titled Installing Metalogix SharePoint Backup.
2. Upgrade all previously deployed Backup Service instances. See the section titled Upgrading a Deployed Backup Service?

3. Upgrade all existing installations of the Management Console by performing a Management Console-only install on each host computer.



Upgrading a Deployed Backup Service

You can use the Management Console to upgrade a deployed Backup Service. You can also use the setup program to manually upgrade a Backup Service.

When you use the Management Console to upgrade the Backup Service, you can upgrade either the primary Backup Service or all Backup Service instances. If you choose to upgrade only the primary Backup Service, you must use the Metalogix SharePoint Backup installer on each Backup Service host to manually upgrade the secondary Backup Service instances.

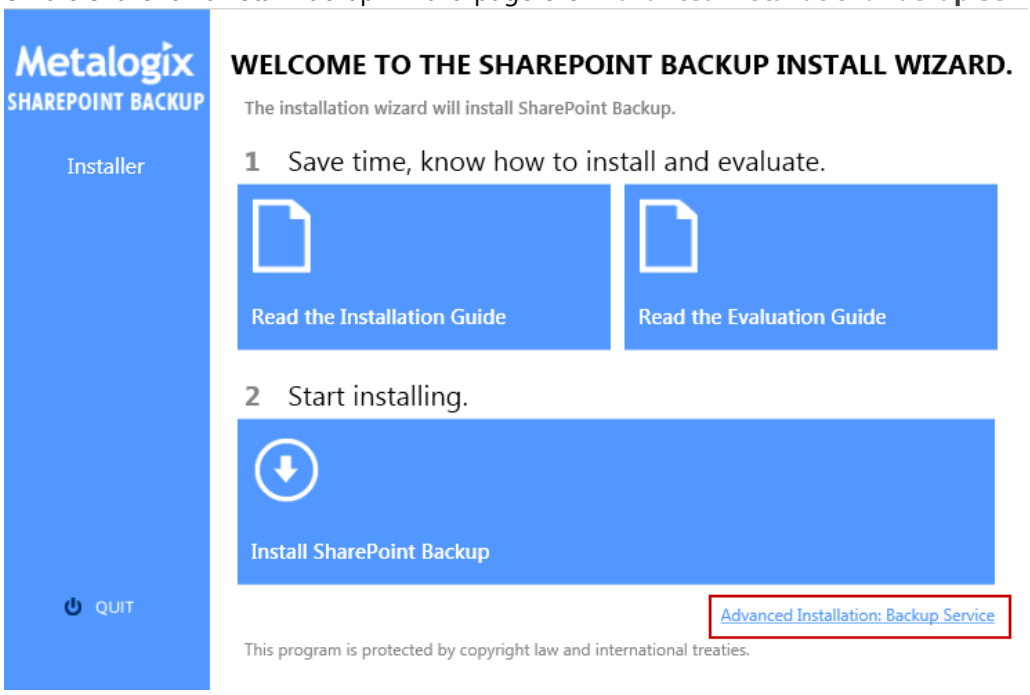
To use the Management Console to upgrade all Backup Service instances

1. Upgrade the Management Console and Management Service to the current version.
2. Run the Management Console. The Management Console lists the Backup Service deployments and prompts you to upgrade them. You can upgrade the primary Backup Service or all Backup Service instances.

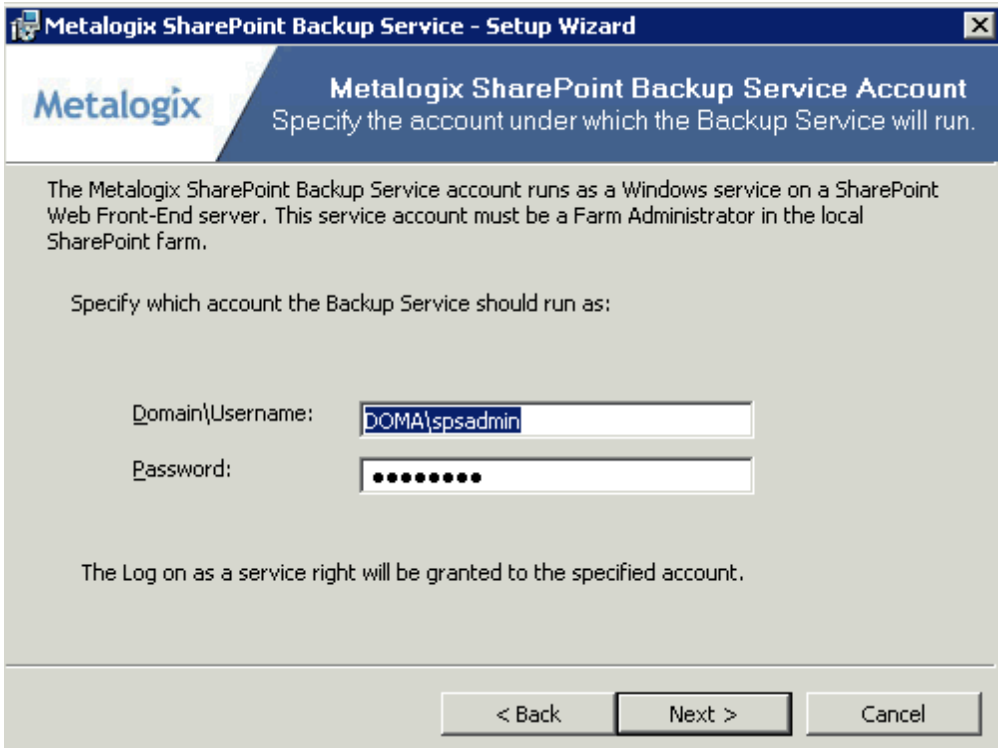
To use the installer to manually upgrade a Backup Service

1. Log on to the computer where you want to upgrade the Backup Service. You should use a user account that is a member of the local administrators group on the computer.
2. Do one of the following:
   - ***If you downloaded the Metalogix SharePoint Backup installation kit,*** use the Windows Explorer to locate the installation kit file, and then double-click the file. You can locate the file name in the table above. In the Metalogix SharePoint Backup Installation Kit dialog box, click **Continue**, then in the Select the folder dialog box, click **OK**. If the installation kit prompts you to create the folder, click **Yes**. When prompted, click **OK** to start setup.
   - ***If you obtained the Metalogix SharePoint Backup installation kit on a disc,*** insert the disc in your computer. If the setup program does not start automatically, double-click **Setup.exe** in the installation disc.

3. On the SharePoint Install Backup Wizard page click **Advanced Installation: Backup Service**.



4. In the Upgrade wizard for Metalogix SharePoint Backup Service page, click **Next**.
5. In the License Agreement page, if you agree with the terms of the license agreement, click **I accept the terms in the license agreement**, then click **Next**.
6. In the Destination Folder page, select a location to install the components, then click **Next**.
7. In the Metalogix SharePoint Backup Service Account page, specify the credentials that the Backup Service uses to run, and then click **Next**.



8. In the Service Location page, specify the location of the Management Service that the Backup Service connects to.

9. In the Ready to Install the Program page, click **Install**.
10. In the Setup wizard Completed page, click **Finish**.

Upgrading the Self-Service Recovery Web Part

When you upgrade Metalogix SharePoint Backup, you can use the Deploy SharePoint Components dialog in the Management Console to upgrade the Self-Service Recovery feature.

For information about using the Deploy SharePoint Components dialog to deploy the Self-Service Recovery feature manually, see the section titled Installing the Self-Service Recovery feature.

Configuring Metalogix SharePoint Backup

Once you configure Metalogix SharePoint Backup for your environment, you can perform the following tasks:

- Opening the Management Console
- Connecting a standalone Management Console to the Management Service
- Configuring Metalogix SharePoint Backup for your farm
- Installing the self-service recovery feature

When the Management Console connects to a particular Management Service, it determines whether you already configured the Management Service. If the Management Service is not yet configured, the Configuration wizard runs. When you run the Configuration wizard, you locate the SharePoint Web front end (WFE) servers and database servers in the farm and install the Backup Service on them. You also define the backup locations for the farm.

Opening the Management Console

You use the Metalogix SharePoint Backup Management Console to configure Metalogix SharePoint Backup and to back up and restore SharePoint content.

When you open the Management Console, it checks for a connection to the Metalogix SharePoint Backup Management Service. If the Management Console cannot connect to the Management Service or if no Management Service is configured, the Management Console prompts you to select the Management Service that it should use. When you install Metalogix SharePoint Backup, you can choose to launch the Management Console when the installer quits.

If you are using a trial license or a license that is soon expiring, the Management Console warns you that the license is nearing its expiration date. You can contact Metalogix to purchase an updated license key.

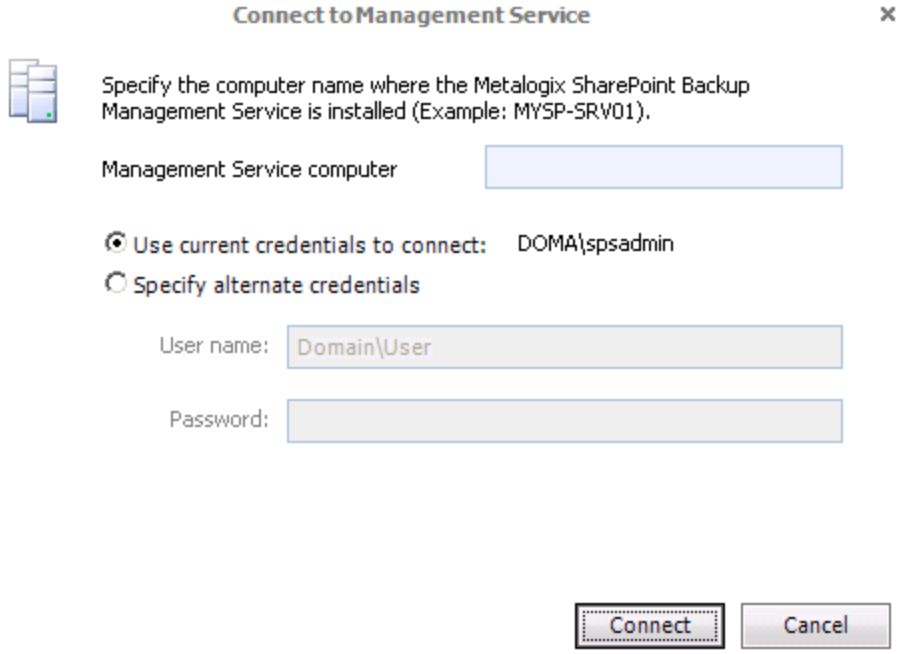
You use the Windows Start Menu to open the Metalogix SharePoint Backup Management Console.

To open the Management Console

1. At the Microsoft Windows desktop, click **Start** > **All Programs** > **Metalogix** > **Metalogix SharePoint Backup** > **Metalogix SharePoint Backup**.
2. If you installed only the Management Console, the Connect to Management Services dialog box appears.

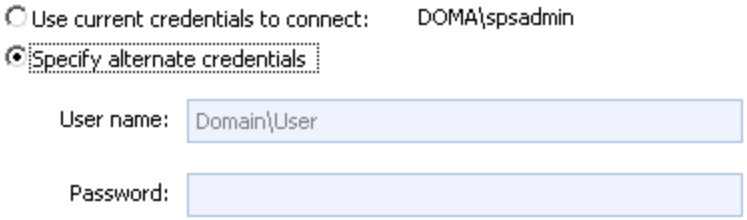
To choose the Management Service for a Console-only installation

1. In the Management Services Connected dialog box, select Add, to add a management service.



2. In the Management Service Computer dialog box, specify the name or IP address of the computer that hosts the Management Service for the farm.

3. Specify the credentials that the Management Console uses to connect to the Management Service. You can click **Use current credentials to connect** to use the credentials of the logged-in user, or you can click **Specify alternate credentials** and enter a user name and password to use.



4. Click **Connect** to finish connecting to the Management Service Computer.

Connecting a Management Console to the Management Service

When you install the Metalogix SharePoint Backup, you can choose to install the Management Console on a computer with no other components. ***If you install only the Management Console,*** you must specify the computer that hosts the Management Service before you can use the Management Console.

You can connect more than one Management Console to a single Management Service.

If the Management Console is not on the computer that hosts the Management Service, the Management Console prompts you to add a Management Service host the first time you open the Management Console.

When it connects to the Management Service, the Metalogix SharePoint Backup Management Console prompts you to add a farm if none exists in the Metalogix SharePoint Backup repository database.

When you specify the name of the Management Service host, you should use one of the following formats:

- DNS name
- NetBIOS name
- IP address

If you installed the Metalogix SharePoint Backup Management Console and the Management Service on the same computer, the Management Console contacts the local Management Service automatically.

Permissions required for the Backup Management Console

The Metalogix SharePoint Backup Management Console uses the SharePoint and Active Directory permissions of the currently logged in user to back up or restore SharePoint objects. If the currently logged in user is unable to access content, the user is unable to back up or restore that content.

TIP	Only users that are members of the SharePoint farm administrators group can perform farm backups.

Configuring Metalogix SharePoint Backup for your farm

If the Metalogix SharePoint Backup Management Console and Management Service are hosted on the same computer, the first time you open the Management Console, the Welcome to Metalogix SharePoint Backup window appears.

If you use a standalone Metalogix SharePoint Backup Management Console, the first time you open the Management Console, the Add Farm dialog box appears. The Add Farm dialog box lets you add a new farm and specify the Management Service to use. If the farm that you specify is not yet configured, the Welcome to Metalogix SharePoint Backup window appears.

The Welcome window lets you configure Metalogix SharePoint Backup. When you start using the product, you must do the following:

- Connect Metalogix SharePoint Backup to the SharePoint farm.
- Install one or more Backup Service instances.
- Optionally deploy the Self-Service Restore feature.
- Configure the Metalogix SharePoint Backup licenses.
- Configure the Metalogix SharePoint Backup settings.
- Set up alerts and notifications.
- Configure grooming and fault tolerance settings.

Use the Configure Metalogix SharePoint Backup wizard to perform all of these tasks. You can also use the Configuration wizard to discover your SharePoint farm, select a Web front end (WFE) server to host the Backup Service, and specify the Backup Service preferences.

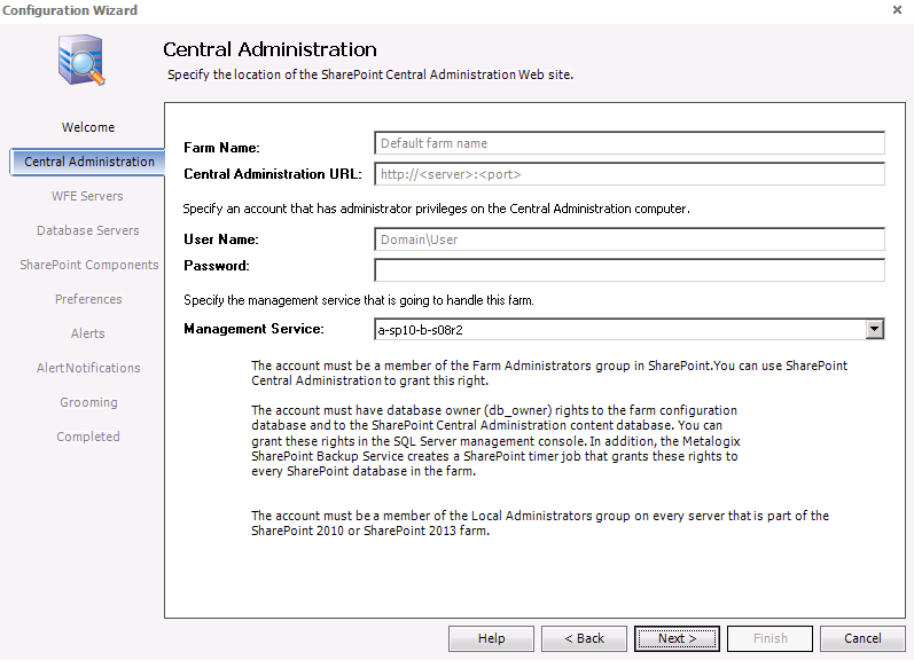
When you start the Management Console, it connects to the Management Service and determines if the Management Service is properly configured. If it is not configured, the Management Console starts the Configuration wizard.

Specifying the Central Administration settings

Use the Configuration wizard to specify how Metalogix SharePoint Backup connects to the farm that you want to back up. Use the Central Administration page in the wizard to specify the Central Administration page URL for the farm. You also specify the credentials that Metalogix SharePoint Backup uses to connect to the farm.

How do I specify the URL and the account to use?

You use the Central Administration page of the Configuration wizard to specify the SharePoint site URL and the account to use.



To specify the SharePoint site URL and account

1. In the Central Administration page of the Configuration wizard, give your farm a name.
2. Enter the URL of the Central Administration site for the SharePoint farm in the Central Administration URL field.
3. Type the name and password of the account that Metalogix SharePoint Backup should use to connect to the Management Service for the farm in the **User Name** and **Password** fields.
4. Select the Management Service that will handle the farm that will be added.
   Note: If this is the first time that a farm will be added, this section is grayed out.
   Click **Next**.
5. In the Web application use policy modification required dialog box, click **OK**.

What permissions does the specified account require?

The specified account needs the following permissions:

- Must be a member of the SharePoint farm administrators group.
- Must be a local administrator on the computer that hosts the Backup Service.
- Must have at least db_owner permissions for all SharePoint content databases, including the Admin Content and SharePoint Config databases

You can also use the tab to specify a separate account with the required SharePoint permissions. This ability to specify two accounts gives you the ability to specify the accounts with the needed permissions

and work within your security model so you do not need a single account with all the required permissions.

TIP	***If the account that you use is not a SQL Server system administrator***, you should use the SQL Server Management Studio to grant the account access to the repository database that you specified when you installed Metalogix SharePoint Backup. The default database name is MetalogixSPBackupRepository.

Selecting the WFE servers where you want to install the Backup Service

The WFE Servers page of the Configuration wizard lists the Web front end (WFE) servers in your SharePoint farm. If your SharePoint farm includes one or more separate database servers, the Database Servers page lists the database servers.

Metalogix SharePoint Backup uses the Backup Service instances that you install to back up the SharePoint objects that you specify in the farm.

If your disaster recovery planning includes farm backups of SharePoint 2010, 2013, or 2016 farms, you must install the Backup Service on every WFE and every database server in your SharePoint farm.

When you use the Configuration wizard, you must install the Backup Service on at least one WFE.

TIP	The first Backup Service that you install must always be on a WFE server.

You should normally use the Configuration wizard to install the Backup Service on every WFE and database server in your SharePoint farm.

You can use the Database Servers page to install the Backup Service on standalone database servers in your SharePoint farm. For more information about the Database Servers page, see Selecting the Database Servers to Install the Backup Service On.

You can also use the Metalogix SharePoint Backup Management Console to install the Backup Service on WFE hosts in the SharePoint farm. In addition, if you add a WFE or a database server to your farm, you can use the Management Console to install the Backup Service on the new server.

Finally, you can use the Metalogix SharePoint Backup installer to install the Backup Service on the WFE or database server directly. To do so, you must be able to log in to the server with an account that is a member of the administrators group on the server. For more information about installing the Backup Service, see Installing the Backup Service manually.

When you install a Backup Service, you select the WFE server to install on. You also specify the user name and password that the Backup Service uses to run. The user account that you specify must have specific permissions for the farm. For more information about the permissions that the Backup Service user account requires, see Backup Service Requirements.

The SharePoint Services Web Application Service must be operating on the WFE where you install the Backup Service. If the server does not have the Web Application Service active, you can use the SharePoint Central Administration page to install it.

In the WFE Servers page of the Configuration wizard, review the selected servers, then click **Next**.

Can I manually install additional Backup Service instances?

Normally, you should not need to manually install additional servers. The WFE Servers page lets you install on every WFE server in the farm.

If you add a WFE or a database server, you can manually install an additional Backup Service in the Configuration tab in the Management Console. For more information about manually installing the Backup Service, see Installing the Backup Service manually.

Selecting the Database Servers to Install the Backup Service on

The Database Servers page of the Configuration wizard lists the standalone database servers in your SharePoint farm. A standalone database server hosts one or more SharePoint database components, but does not host a Web front end (WFE).

Metalogix SharePoint Backup uses the Backup Service instances that you install to back up the SharePoint objects that you specify in the farm.

If your disaster recovery planning includes farm backups of SharePoint 2010, 2013, or 2016 farms, you must install the Backup Service on every WFE and every database server in your SharePoint farm.

When you use the Configuration wizard, you can install the Backup Service on any database servers in the farm.

TIP	The Database Servers page only appears if your farm includes one or more database servers that do not also host a WFE.

You should normally use the Configuration wizard to install the Backup Service on every database server in your SharePoint farm.

You can also use the Metalogix SharePoint Backup Management Console to install the Backup Service on WFE hosts in the SharePoint farm. In addition, if you add a WFE or a database server to your farm, you can use the Management Console to install the Backup Service on the new server.

Finally, you can use the Metalogix SharePoint Backup installer to install the Backup Service on the WFE or database server directly. To do so, you must be able to log in to the server with an account that is a member of the administrators group on the server. For more information about installing the Backup Service, see Installing the Backup Service manually.

When you install a Backup Service, you select the database server to install on. You also specify the user name and password that the Backup Service uses to run. The user account that you specify must have specific permissions for the farm. For more information about the permissions that the Backup Service user account requires, see Backup Service Requirements.

In the Database Servers page of the Configuration wizard, review the selected servers, then click **Next**.

Can I manually install additional Backup Service instances?

Normally, you should not need to manually install additional servers. The Database Servers panel let you install on every database server in the farm.

If you add a database server, you can manually install an additional Backup Service in the Configuration tab in the Metalogix SharePoint Backup Management Console. For more information about installing the Backup Service manually, see Installing the Backup Service manually.

Installing the Self-Service Recovery feature

Metalogix SharePoint Backup Management Console can restore content in place from any content from a farm backup. Only members of the farm administrators group can use the Management Console to restore content from a farm backup.

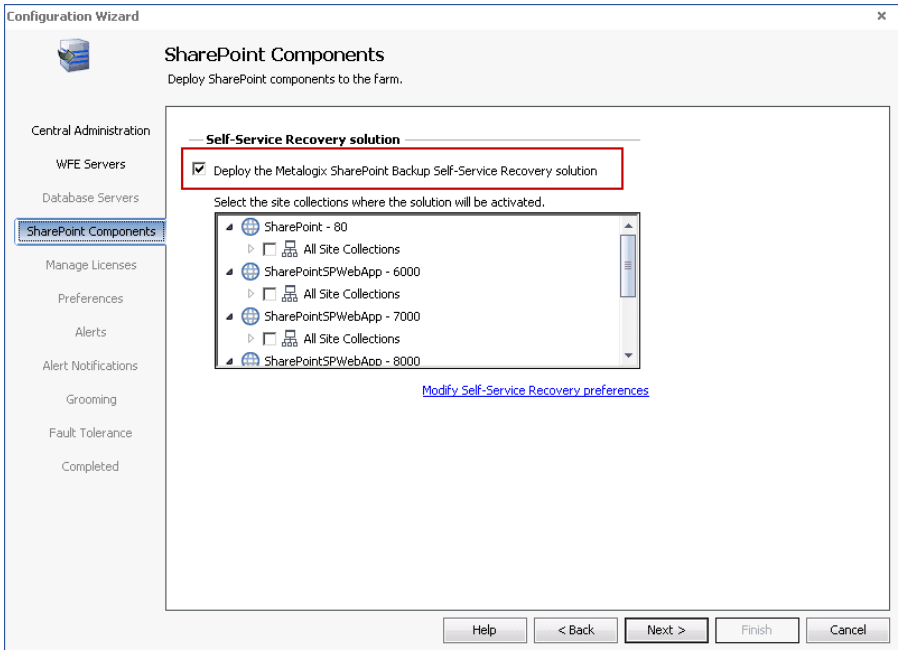
When you install the Self-Service Recovery feature, Metalogix SharePoint Backup does the following automatically:

- Copy the Self-Service Recovery SharePoint Solution package (.WSP file) to the SharePoint farm solution store.
- Deploy the solution to the Web application that is the parent of any site collections that you specify.

- Activate the deployed solution as a SharePoint feature on the site collections.

The Self-Service Recovery feature is optional. You do not have to install it to use Metalogix SharePoint Backup. You should deploy the Self-Service Recovery feature on every site collection where you want to use it.

You can use the SharePoint Components page in the Configuration wizard to select the site collections where you want to let users access the Self-Service Recovery feature.



If you want to deploy the Self-Service Recovery feature, in the SharePoint Components page, you can select the **Deploy the Metalogix SharePoint Backup Self-Service Recovery solution** check box, then select the check boxes for the site collections and sites where you want to deploy Self-Service Recovery.

If you do not want to deploy the Self-Service Recovery feature, in the SharePoint Components page, you can clear the **Deploy the Metalogix SharePoint Backup Self-Service Recovery solution** check box.

After you deploy the Self-Service Recovery feature, you can configure the Self-Service Recovery settings in each site collection where you want to use it.

If you need to, you can click **Modify Self-Service Recovery preferences** to configure the Self-Service Recovery settings.

For more information about the Self-Service Recovery settings, see Configuring the Self-Service Recovery settings.

When you have configured the settings, you can click **Next** to continue.

How do I upgrade the Self-Service Recovery feature?

When you upgrade Metalogix SharePoint Backup, you can use the Deploy SharePoint Components dialog in the Management Console to upgrade the Self-Service Recovery feature.

Configuring the Self-Service Recovery Settings

Use the Metalogix SharePoint Backup Management Console to configure the following settings for the Self-Service Recovery feature:

Management Service host name

You can specify the name of the Management Service host that the Self-Service Recovery feature should access. If you change the Management Service host name, the Self-Service Recovery feature uses backups from that Metalogix SharePoint Backup deployment. If that Metalogix SharePoint Backup does not backup the site collection, no content appears in the Self-Service Recovery feature in the site collection.

When you specify the Management Service host name, you can use any of the following formats:

- Machine name
- Fully-qualified name
- IP address

Management Service port

The port that the Self-Service Recovery feature should use to contact the Management Service. You should ensure that your network configuration allows the Self-Service Recovery to use this port in order to access the Management Service. If you change the Management Service port here, you must also change the Management Service port on the Management Service.

Number of items that appear when you browse backed-up content

You can specify how many items appear in the Self-Service Recovery feature when you browse the backed-up content. The more items that appear in the list, the longer it takes SharePoint to display the page.

Number of items that appear when you search for content

You can specify how many items appear in the Self-Service Recovery feature when you search for backed-up content. The more items that appear in the list, the longer it takes SharePoint to display the page.

The ULS logging level that Self-Service Recovery uses

When it encounters an error, the Self-Service Recovery feature logs the error to the SharePoint Unified Logging System (ULS) logs. You can specify the level of the content added to the ULS logs. You can select one of the following log levels:

- Undefined
- Exception
- Critical
- Warning
- Informational

When you select a level, items of that level and more serious are added to the ULS logs.

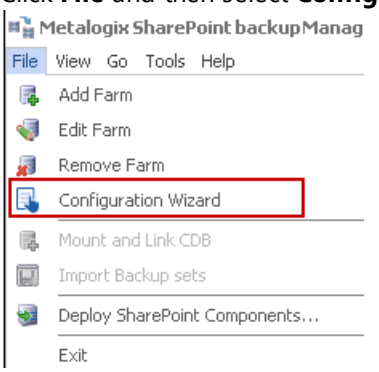
How do I configure the Self-Service Recovery settings?

You use the Metalogix SharePoint Backup Self-Service Recovery Settings dialog box in the Management Console to configure the Self-Service Recovery settings. You can configure the settings when you deploy the Self-Service Recovery feature or at a later time.

To configure the Self-Service Recovery settings in the Configuration wizard

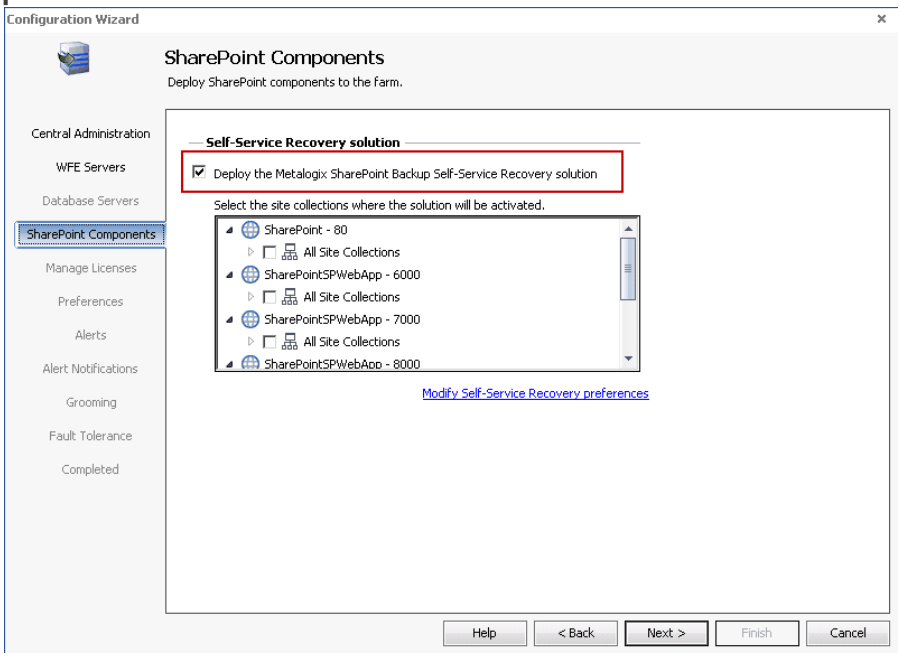
1. Open the configuration wizard within the SharePoint Backup console by doing one of the following:

- Click **File** and then select **Configuration Wizard** from the drop down list

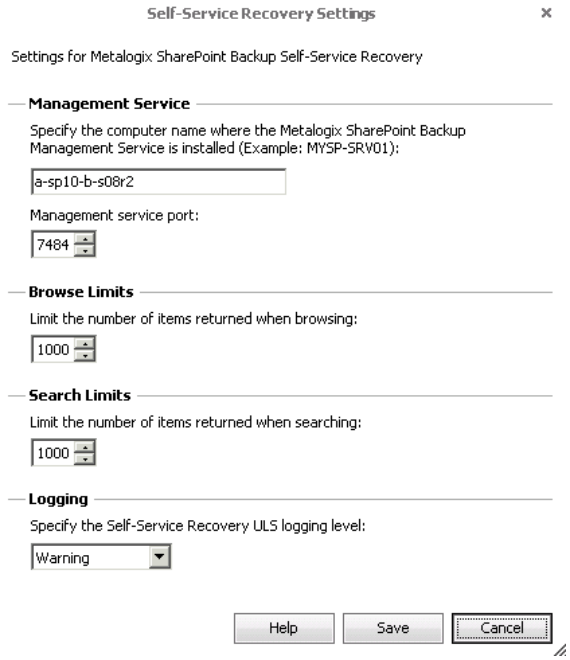


- Click the **Configuration Wizard** icon, found in the upper ribbon of the console.

2. When you use the Configuration wizard, the SharePoint Components page lets you deploy the Self-Service Recovery feature. In the SharePoint Components page, click **Modify Self-Service Recovery preferences**.



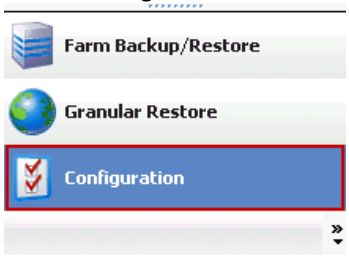
3. In the Self-Service Recovery Settings dialog box, configure the settings, then click **Save**.



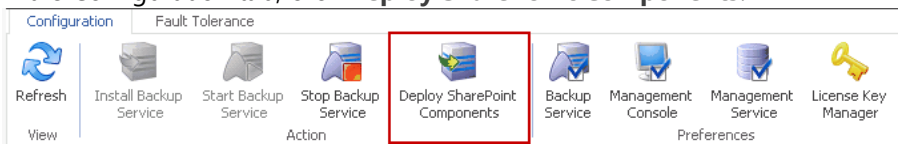
4. In the Configuration wizard, in the SharePoint Components page, click **Next** to continue the wizard.

To configure the Self-Service Recovery settings

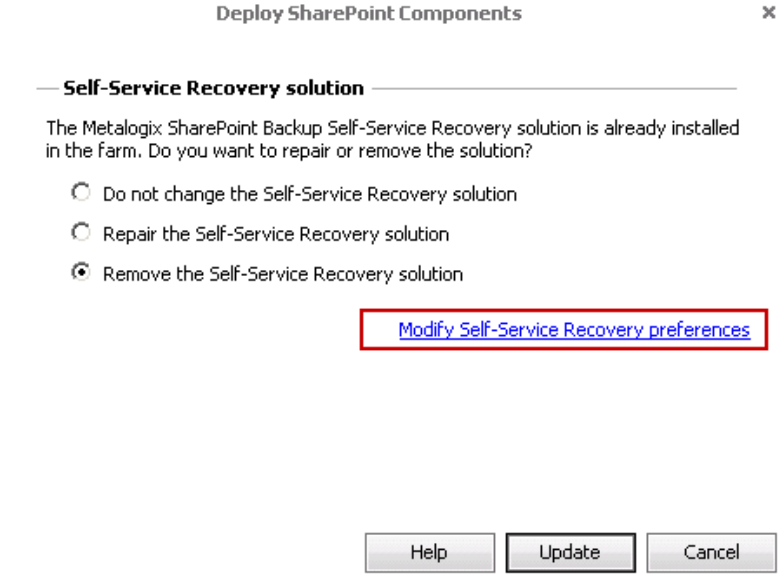
1. In the Management Console, click **Configuration**.



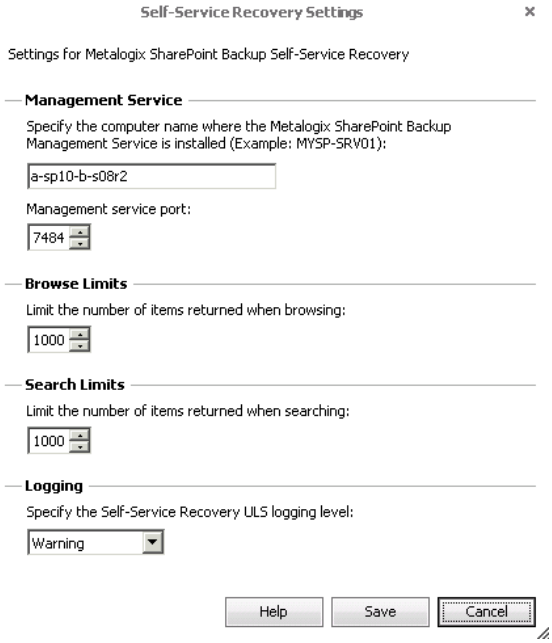
2. In the Configuration tab, click **Deploy SharePoint Components**.



3. In the Deploy SharePoint Components dialog box, click **Modify Self-Service Recovery preferences**.



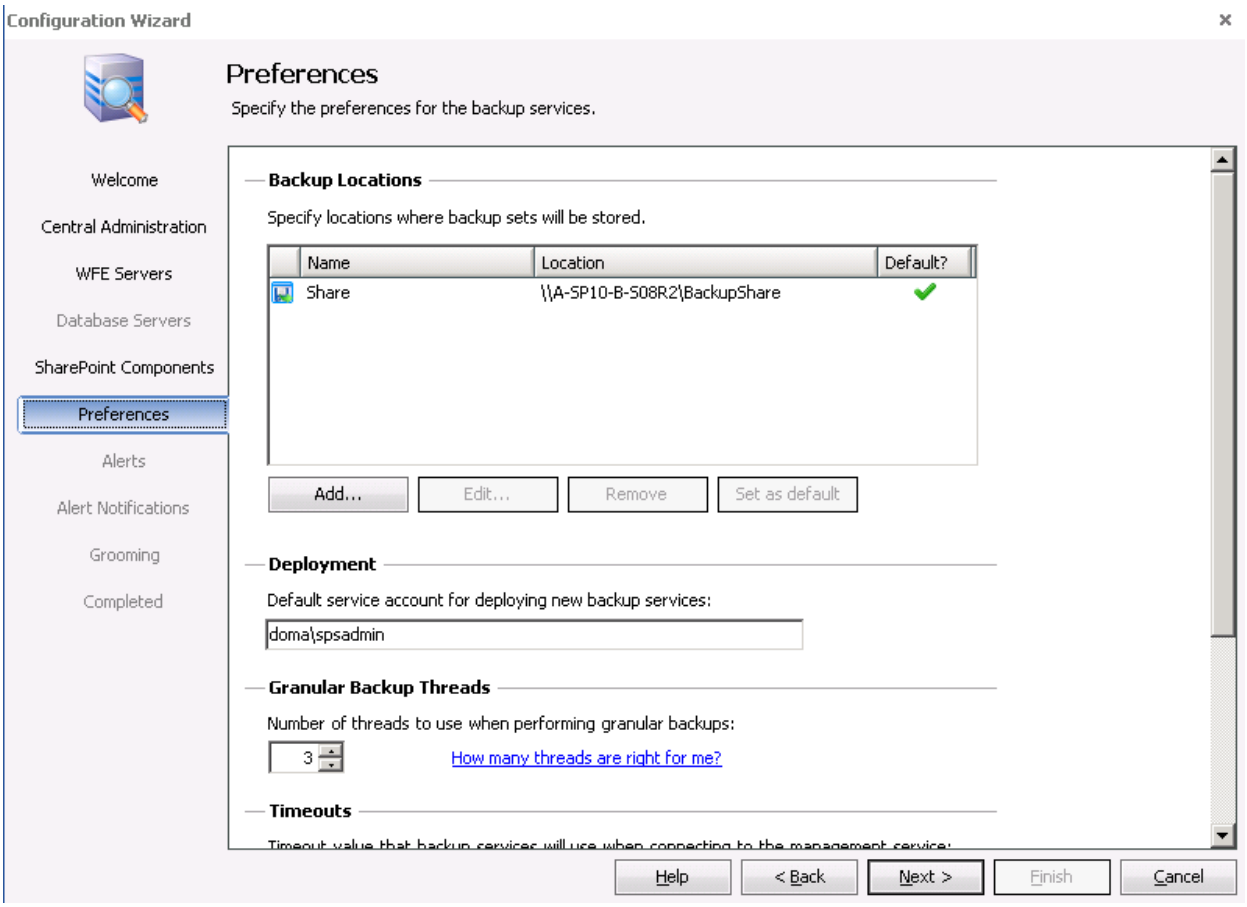
4. In the Self-Service Recovery Settings dialog box, configure the settings, then click **Save**.



5. In the Deploy SharePoint Components dialog box, click **Cancel**.

Specifying the Backup Service preferences for a new farm

The Preferences page of the Configuration wizard lets you specify the Metalogix SharePoint Backup Backup Service options.



You can specify the following items:

- Where to store your backed up content
- The service account that each Backup Service uses on each host.
- The timeout value that a Backup Service uses when it connects to the Management Service.
- The port that the Management Service uses to communicate with the Backup Service on each host.
- The debug logging setting.

Use the Preferences dialog box to make changes to the preferences for an existing farm. For more information about changing preferences for an existing farm, see Specifying the Backup Service preferences.

You can back up content from your SharePoint farms to a network location that you specify with a UNC path. You can also back up content to a Tivoli Storage Manager (TSM) client node, Azure and/or Amazon account. You must set up a TSM virtual server client node, Azure and/or Amazon account before you can back up to these options.

TIP	If you remove a backup location that Metalogix SharePoint Backup uses to store data in TSM, removing the location removes references to the data in Metalogix SharePoint Backup. In addition, Metalogix SharePoint Backup sets the data objects to Inactive in TSM but does not automatically delete the data itself. If you need to delete the data from TSM, you should use the TSM management tools to do so.

The maximum number of threads is 32, while most environments use fewer threads. When you configure the number of threads, you must balance the backup performance with the performance of the farm as a

whole. Determining the number of threads appropriate for your environment requires experiments to determine the best mix for your specific needs. For more information about configuring the number of threads, see Specifying the Backup Service preferences.

When you specify the timeout value, you determine how long a Backup Service should wait for the Management Service to respond when it tries to connect. When the time that you specify expires, the Backup Service stops trying to connect and logs an error. You specify the timeout in seconds.

The Management Service uses the port that you specify to communicate with each Backup Service that you install. You should make sure that the firewall settings on your network allow the Management Service to reach every Backup Service that you install.

The Backup Service normally logs its actions. You can control the level of detail that the Backup Service uses in logging. When you enable debug logging, the Backup Service creates debug logs in addition to regular logging. The additional detail in these logs can assist Metalogix Technical Support. If a problem occurs, you can use the Management Console to send the Backup Service log files to Metalogix Technical Support at http://metalogix.com/support.

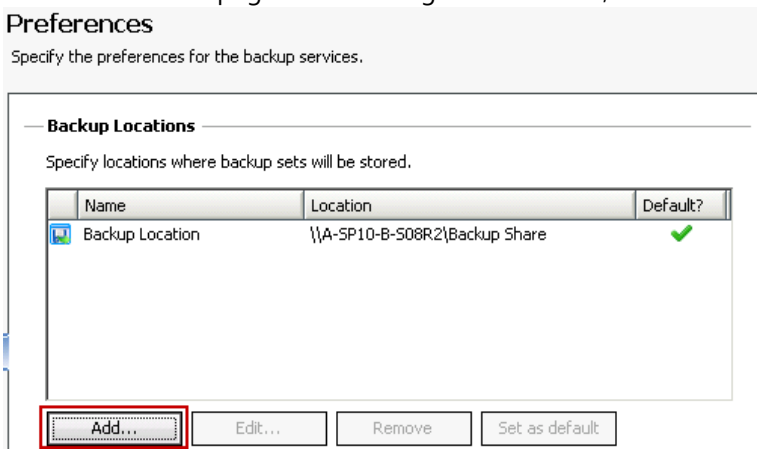
The maximum size of a debug log is 4 MB. When the log file reaches this maximum, Metalogix SharePoint Backup automatically stores the log. Metalogix SharePoint Backup keeps the active log and one stored log, meaning that the maximum log size on any Backup Service host is 8 MB.

How do I choose where to store backed up content?

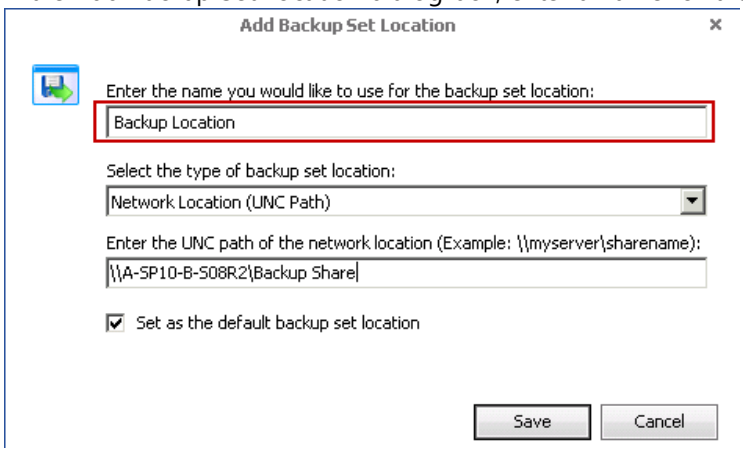
You use the Preferences page of the Configuration wizard to choose a backup location and to select the default service account.

To add a backup location

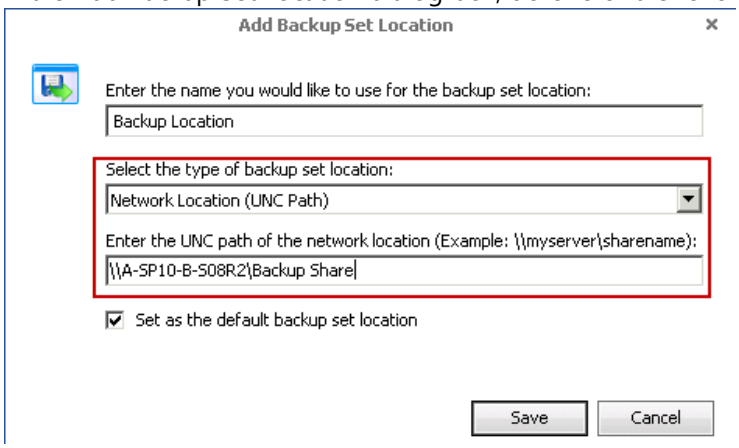
1. In the Preferences page of the Configuration wizard, click **Add**.



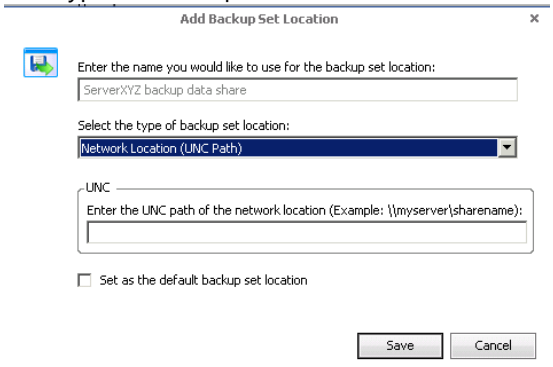
2. In the Add Backup Set Location dialog box, enter a name for the backup location.



3. In the Add Backup Set Location dialog box, do one of the following:

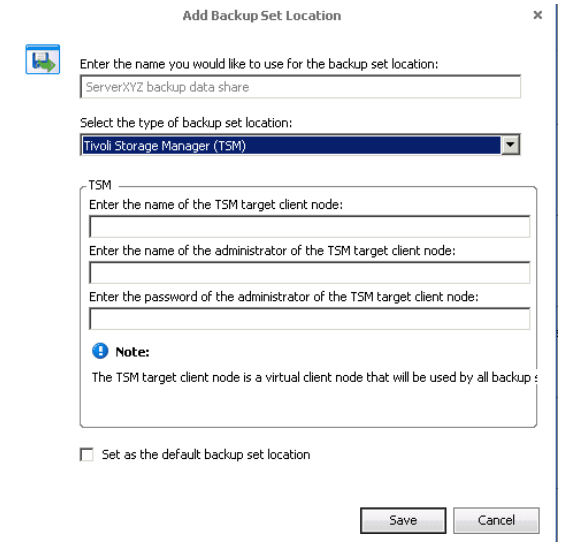


   - If you want to use a network volume to store backed up information from SharePoint, select **Network Location (UNC Path)** from the Select the type of backup set location drop-down list, then type the UNC path of the location in the **Enter the UNC path of the network location** field.

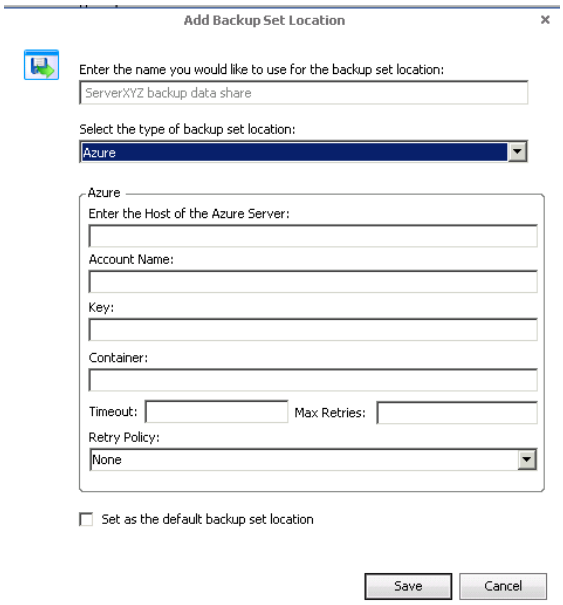


   - If you want to use a Tivoli Storage Manager (TSM) virtual client node to store backed up information from SharePoint, select **Tivoli Storage Manager (TSM)** from the Select the type of backup set location drop-down list, then specify the client node Metalogix SharePoint Backup

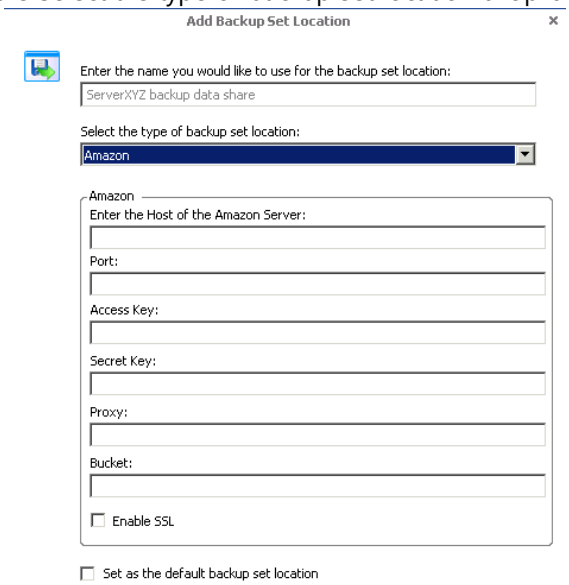
should use in the **Enter the name of the TSM target client node** field.



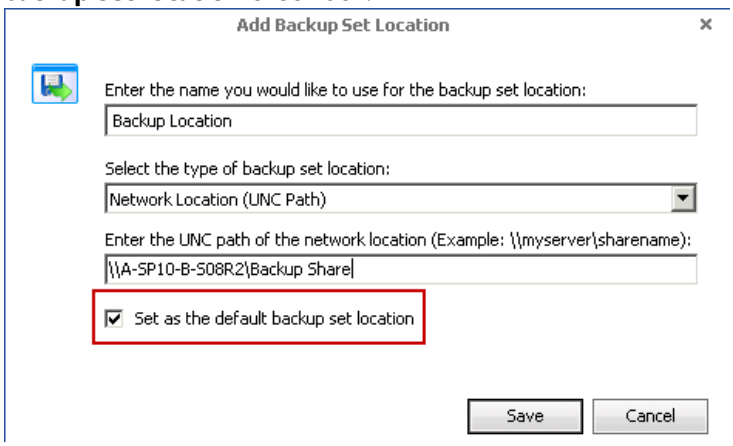
- If you want to use Azure to store backed up information from SharePoint, select **Azure** from the Select the type of backup set location drop-down list, then specify the Host and Account information.



- If you want to use Amazon to store backed up information from SharePoint, select **Amazon** from the Select the type of backup set location drop-down list, then specify the Host information.



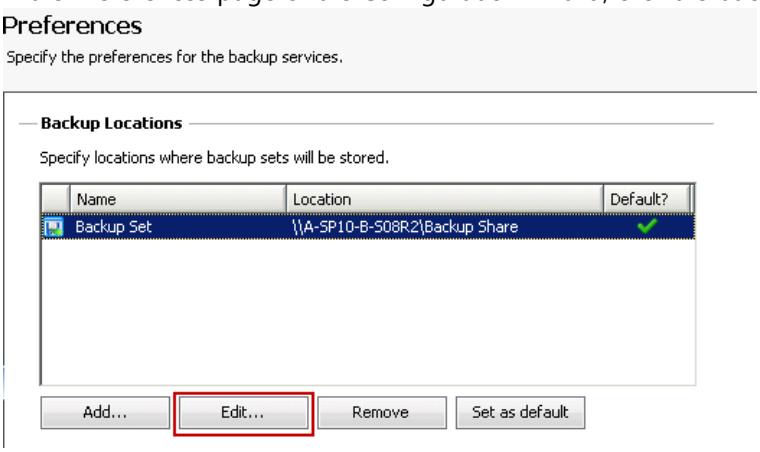
4. If the new location should be the default location for backup sets, select the **Set as the default backup set location** check box.



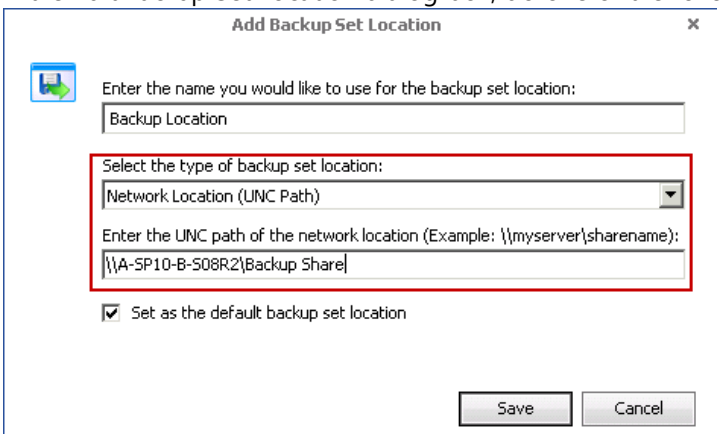
5. Click **OK**.

To edit a backup location

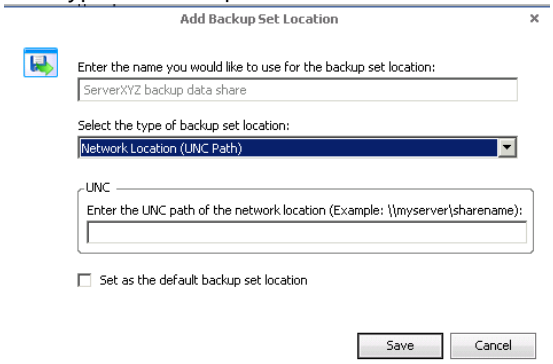
1. In the Preferences page of the Configuration wizard, click the backup set to edit, then click **Edit**.



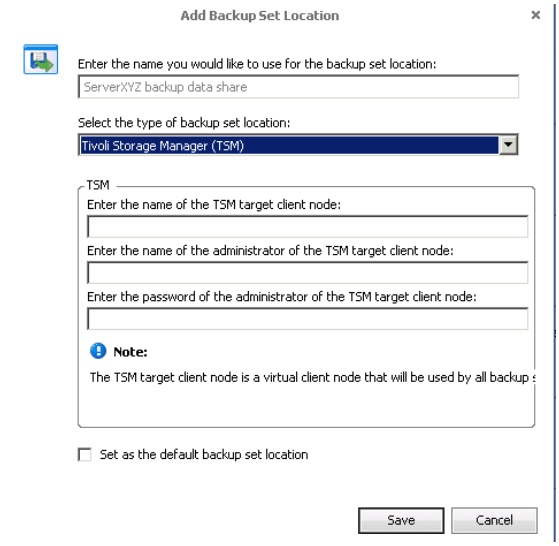
2. In the Edit Backup Set Location dialog box, enter a name for the backup location.
3. In the Edit Backup Set Location dialog box, do one of the following:



- If you want to use a network volume to store backed up information from SharePoint, select **Network Location (UNC Path)** from the Select the type of backup set location drop-down list, then type the UNC path of the location in the **Enter the UNC path of the network location** field.

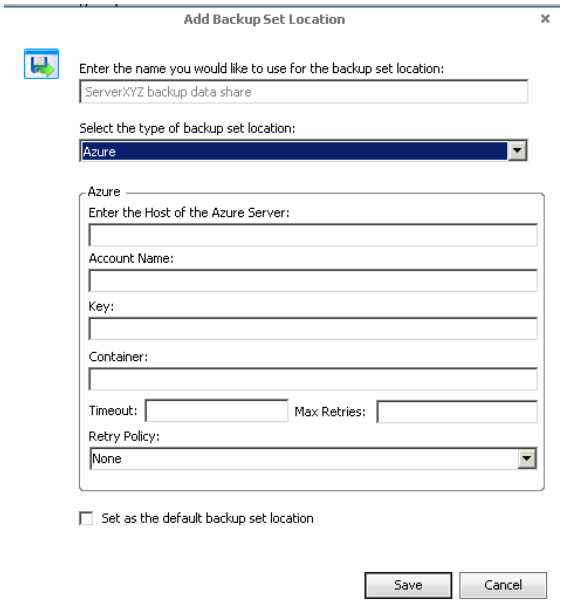


- If you want to use a Tivoli Storage Manager (TSM) virtual client node to store backed up information from SharePoint, select **Tivoli Storage Manager (TSM)** from the Select the type of backup set location drop-down list, then specify the client node Metalogix SharePoint Backup should use in the **Enter the name of the TSM target client node** field.

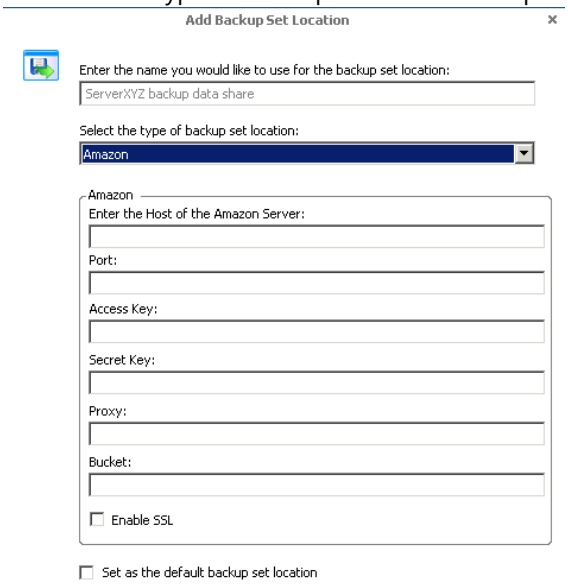


- If you want to use Azure to store backed up information from SharePoint, select **Azure** from the Select the type of backup set location drop-down list, then specify the Host and Account

information.



- If you want to use Amazon to store backed up information from SharePoint, select **Amazon** from the Select the type of backup set location drop-down list, then specify the Host information.

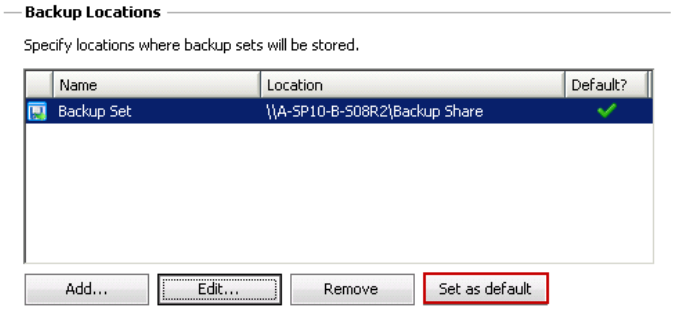


4. Click **OK**.

To set a backup location as the default

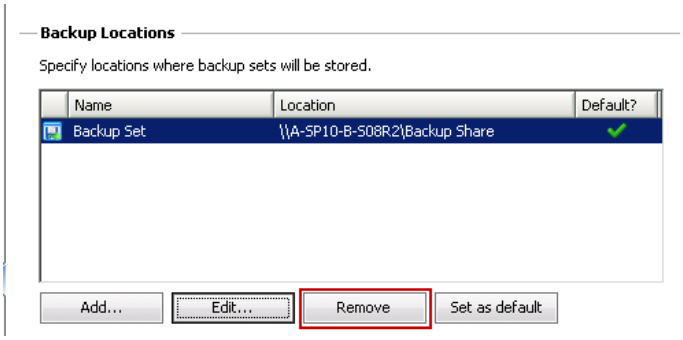
1. In the Preferences page of the Configuration wizard, click the backup set to set as the default.

2. Click **Set as default**.

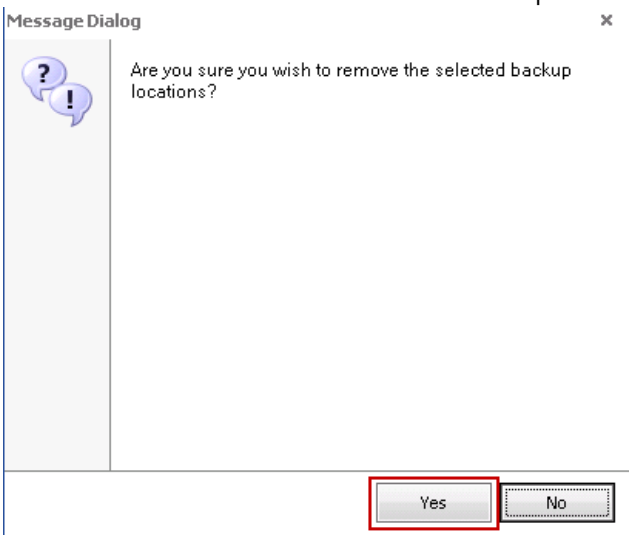


To remove a backup location

1. In the Preferences page of the Configuration wizard, click the backup set to remove.
2. Click **Remove**.



3. Metalogix SharePoint Backup prompts you to confirm that you want to remove the backup location. If you remove the backup location, any sets stored in that location are not deleted. You must manually delete the sets. Click **Yes** to remove the backup location.



How do I set the default service account?

You use the Preferences page in the Configuration wizard to set the default account that the Backup Service uses.

To set the default service account

- In the Preferences page of the Configuration wizard, in the Deployment area, enter the default account for Metalogix SharePoint Backup to use when for new Backup Service instances. You should

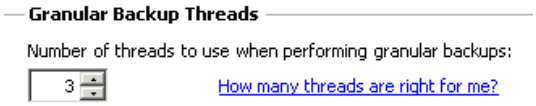
enter the account in <*domain name*>\<*account name*> format.

How do I set the number of Threads used when performing granular backups?

You use the Preferences page in the Configuration wizard to set the number of threads used for granular backup.

To set the number of Granular Backup Threads used

- On the Preferences page of the Configuration wizard, in the Granular Backup Threads area, enter the number of threads that Metalogix SharePoint Backup should use to perform granular backups. You can type the number of threads used in the field, or use the up and down buttons to change the number of threads.

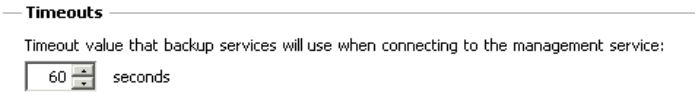


How do I configure the Backup Service timeout value?

You use the Preferences page in the Configuration wizard to set the Backup Service timeout value. The timeout value is in seconds.

To set the Backup Service timeout value

- In the Preferences page of the Configuration wizard, in the Timeouts area, enter the length of time that Metalogix SharePoint Backup should wait for successful communications. You can type the number of seconds in the field or use the up and down buttons to change the number of seconds.



How do I configure the port that the Management Service uses to communicate with the Backup Service?

You use the Preferences page in the Configuration wizard to set the port that the Management Service uses to communicate with the Backup Service.

To configure the port that the Management Service uses to communicate with the Backup Service?

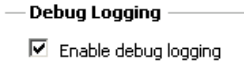
- In the Preferences page of the Configuration wizard, in the Ports area, enter the port that the Management Service uses to communicate with the Backup Service. You can type the number in the field or use the up and down buttons to change the number.

How do I configure debug logging?

You use the Preferences page in the Configuration wizard to enable and disable debug logging.

To configure debug logging

- In the Preferences page of the Configuration wizard, in the Debug logging area, select or clear the **Enable debug logging** check box.



What should I consider when I specify where to store backup sets?

Make sure the Backup Service account has write permission to the specified share and file location. In addition, make sure there is enough disk space available to store the backup sets and the network performance is optimal between the Backup Service instances and the backup set storage location.

You can review the Today page in the Management Console for disk space usage and availability. As needed, you can archive backup sets to make more disk space available. Later, if you need to restore objects from an archived backup set, you can import the archived backup set and then restore the objects.

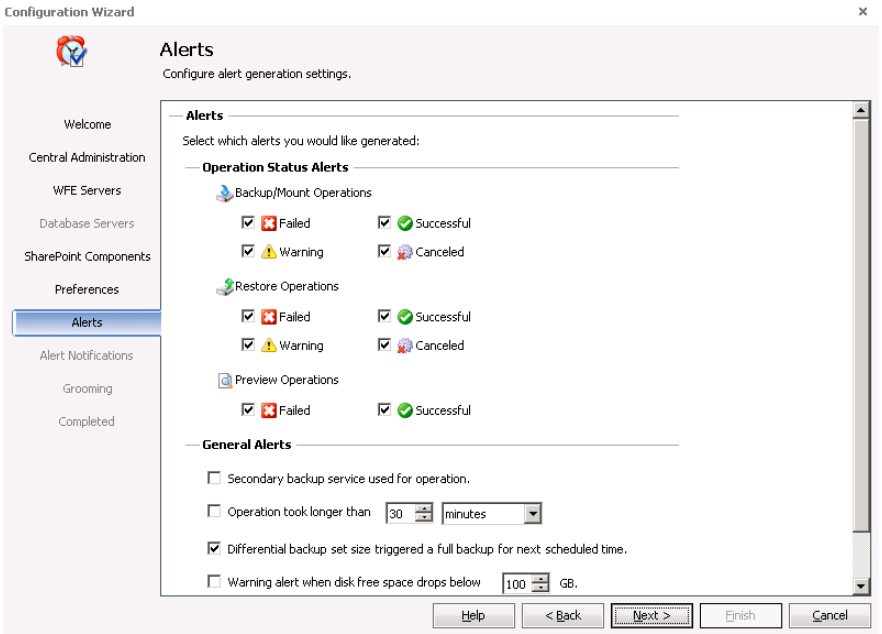
What permissions does the service account for the Backup Service require?

The specified account needs the following permissions:

- Must be a member of the SharePoint farm administrators group.
- Must be a local administrator on the computer that hosts the Backup Service.
- Must have at least db_owner permissions for all SharePoint content databases, including the Admin Content and SharePoint Config databases.

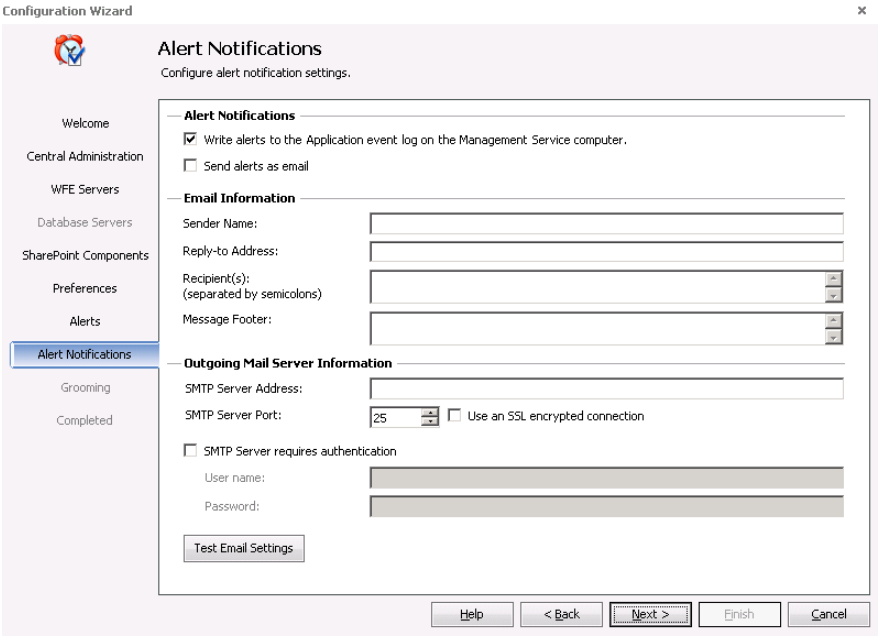
Configuring the alert settings

Metalogix SharePoint Backup generates an alert when a specified condition occurs. When Metalogix SharePoint Backup generates the alert, it can send an email to one or more email addresses that you specify, log the alert, or both. You can use the Alerts page in the Configuration wizard to choose the conditions that trigger an alert. When you have configured the alerts, you can click **Next** to continue in the wizard.



Configuring the alert notification settings

When Metalogix SharePoint Backup generates an alert, it can log the alert notification to the Application Event Log on the computer that hosts the Management Service, send an email to one or more addresses that you specify, or both. You can use the Alert Notifications page in the Configuration wizard to set up the alert notifications. When you have configured the settings, click **Next** to continue.



Configuring the grooming settings

If you choose, Metalogix SharePoint Backup can groom older alerts and backup sets automatically to conserve storage space. When it grooms data, Metalogix SharePoint Backup automatically removes the old data from the backup location or the alert log. You can use the Grooming tab in the Configuration wizard to set up the grooming options. After you set the options, you can click **Next** to continue.