

Metalogix® Backup for SharePoint 6.8

Advanced Installation Guide



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Legend

 **CAUTION:** A caution icon indicates potential damage to hardware or loss of data if instructions are not followed.

 **IMPORTANT, NOTE, TIP, MOBILE OR VIDEO:** An information icon indicates supporting information.

Metalogix® Backup for SharePoint

Updated July 2020

Version 6.8

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About This Guide

The Advanced Installation Guide provides information about the installation, upgrade, and removal of Metalogix Backup for SharePoint in various SharePoint farm configurations.

Installation and configuration issues

When you install Metalogix Backup for SharePoint, 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 Backup for SharePoint 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 Backup for SharePoint, you should restart all of the Backup Service instances in the farm.

Considerations

Here are a few general considerations about Metalogix Backup for SharePoint 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" 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 Backup for SharePoint help may not load properly, and the help window displays a blank screen.

Tivoli Storage Manager considerations

Tivoli Storage Manager (TSM) is a product from IBM that helps you to manage storage and backup on your enterprise network. If your enterprise network includes a TSM deployment, you can configure Metalogix Backup for SharePoint to store backup sets in TSM. Before you can use TSM as a backup location, you must configure it.

i | **NOTE:** Metalogix Backup for SharePoint supports the 32-bit versions 6.x and 7.x of the Tivoli Storage Manager (TSM), as well as 64-bit versions for 7.x and 8.x of TSM.

The steps to configure TSM in your environment depend on the version of TSM you have installed, and the way that your environment is configured. In general, though, you must do the following:

- Install and configure the TSM client software on every server in your SharePoint farm where the Backup Service is installed.
- On the TSM server, create a single virtual client node that the clients share.
- Grant access to the virtual client node to every server that hosts a Backup Service.
- In TSM, configure the options for the virtual client node. In addition to whatever options are appropriate for your deployment, you must set the option **backdel=yes**.
- In the Management Console, when you create a TSM backup location, you enter the name of the virtual client node where Metalogix Backup for SharePoint stores the backup data.

The default TSM filespace that Metalogix Backup for SharePoint uses is **IderaSPbackup**. For information about installing configuring TSM and configuring the TSM client options, see your TSM documentation set. For more information about creating a Backup Location, see [Specifying Backup Storage Locations](#).

i **TIP:** If you enable data grooming for a backup set that Metalogix Backup for SharePoint stores in TSM or if you manually delete the reference to a backup set that is stored in TSM from the Management Console, Metalogix Backup for SharePoint removes references to the data in Metalogix Backup for SharePoint. In addition, Metalogix Backup for SharePoint sets the data objects to Inactive in TSM. Metalogix Backup for SharePoint 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.

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 Backup for SharePoint 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 Backup for SharePoint 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 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 Backup for SharePoint 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 Backup for SharePoint.

FAST Search Service considerations

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

- 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

Metalogix Backup for SharePoint is also able to backup and restore the metadata related with Content indexes for these Databases.

- SharePoint 2013, 2016 and 2019 has a merged version of the SharePoint Search and FAST Search Server for SharePoint search engines. As a result, Metalogix Backup for SharePoint 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 Backup for SharePoint.
- 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 Backup for SharePoint 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 Backup for SharePoint 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 Backup for SharePoint 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 Backup for SharePoint.
- If you select particular components or component types for a farm backup operation, then add a new component to your SharePoint farm, Metalogix Backup for SharePoint 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 Backup for SharePoint 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 Backup for SharePoint 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.

Product requirements

You can install Metalogix Backup for SharePoint 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 Backup for SharePoint in a typical environment:

- [SharePoint Requirements](#)
- [Management Console requirements](#)
- [Management Service requirements](#)
- [Backup Service Requirements](#)
- [Self-Service Recovery requirements](#)

SharePoint requirements

To use Metalogix Backup for SharePoint, 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
- Microsoft SharePoint Server 2019

i | **TIP:** To perform a farm component backup, your SharePoint farm must have SharePoint 2010, 2013, 2016 or 2019 installed.

Management Console requirements

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

i | **NOTE:** If you install the Management Console with any other Metalogix Backup for SharePoint components, you must use a version of Windows Server. Windows 7, Windows 8, Windows 8.1 and Windows 10 can host only 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 4.5.2
- Monitor capable of displaying 16-bit or more colors at a resolution of 1024 X 768 or higher.
- One of the following Windows 64-bit versions:
 - Windows Server 2008 SP2
 - Windows Server 2008 R2
 - Windows Server 2012
 - Windows Server 2012 R2
 - Windows Server 2016
 - Windows Server 2019
 - Windows 7
 - Windows 8
 - Windows 8.1
 - Windows 10

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

i | **NOTE:** If the Metalogix Backup for SharePoint Repository will be located on a SQL Alias then the SQL Alias registry should be created for both 32-bit and 64-bit operation with the respective versions of the **cliconfg.exe** tool. Otherwise there could be a SQL server connection error problem.

Management Service requirements

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

What are the hardware and software requirements for the Management Service?

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 4.5.2
- 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 Server 2016
 - Windows Server 2019

What are the permission requirements for the Backup Service user account?

The user account that you specify for the 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, 2016 or 2019 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 Backup for SharePoint, 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](http://msdn.microsoft.com/en-us/library/aa384604(VS.85).aspx).

Backup Repository requirements

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 Backup for SharePoint components. The SQL Server host that you select should be one of the following:

- Microsoft SQL Server 2008 R2
- Microsoft SQL Server 2012
- Microsoft SQL Server 2014
- Microsoft SQL Server 2016
- Microsoft SQL Server 2017
- Microsoft SQL Server Express
- [optional] Latest version of SQL 2012 native client if TLS 1.2 or 1.1 connections are needed.

Backup Service requirements

Install the Backup Service on every SharePoint Web front end (WFE) server and database server in the SharePoint 2010, 2013, 2016 or 2019 farms that you back up.

What are the 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
 - Version 3.5 for SharePoint 2010

- Version 4.0 for SharePoint 2013
- Version 4.5 for SharePoint 2016
- One of the following Windows versions, either 32-bit or 64-bit:
 - Windows Server 2008
 - Windows Server 2008 R2
 - Windows Server 2012
 - Windows Server 2012 R2
 - Windows Server 2016
 - Windows Server 2019

What are the 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, 2016 or 2019 farms, the Backup Service account must be a member of the local Administrators group on the server that hosts the Backup Service.

On SharePoint 2010, 2013, 2016 or 2019 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 Administrators 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 Backup for SharePoint 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 Backup for SharePoint 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, 2016 or 2019 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 Backup for SharePoint 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 Backup for SharePoint for your farm, you can automatically deploy the feature to the farm.

i | **NOTE:** The Metalogix Self-Service Recovery solution is not supported for a Microsoft SharePoint 2019 farm.

Installing and deploying Metalogix Backup for SharePoint

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

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

Installing on a dedicated server

Metalogix Backup for SharePoint helps you to back up and restore the content of SharePoint 2010, 2013, 2016 and 2019 farms and the farm components that make up your SharePoint 2010, 2013, 2016 and 2019 farms. Before you can use Metalogix Backup for SharePoint, 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 [Product requirements](#).

For more information about installing Metalogix Backup for SharePoint on a "standalone" SharePoint server that hosts a basic install of SharePoint 2010, 2013, 2016 or 2019, see [Installing on a standalone SharePoint server](#).

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

How do I install Metalogix Backup for SharePoint?

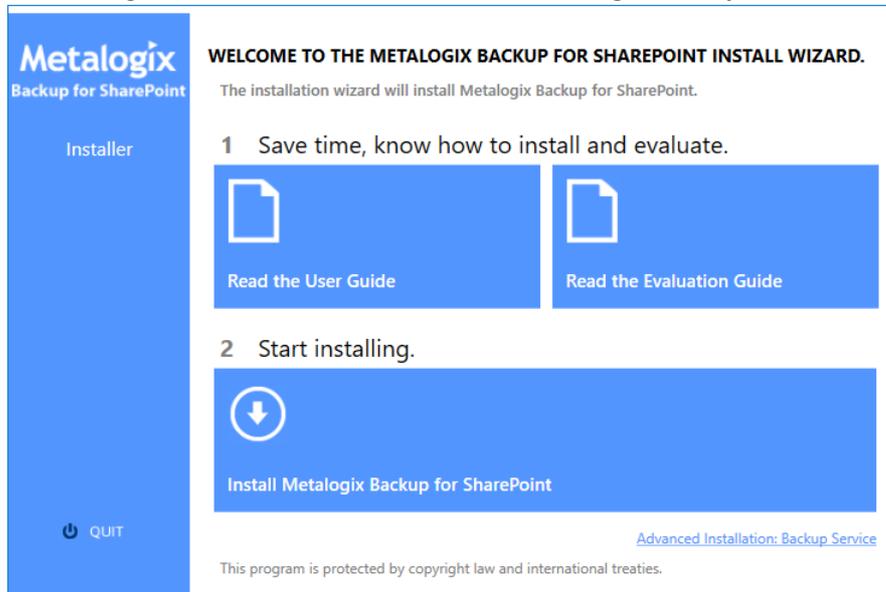
Use the Metalogix Backup for SharePoint Installation files to install the product. You can install Metalogix Backup for SharePoint on any computer that meets or exceeds the product requirements.

To install all of the Metalogix Backup for SharePoint components on a dedicated server

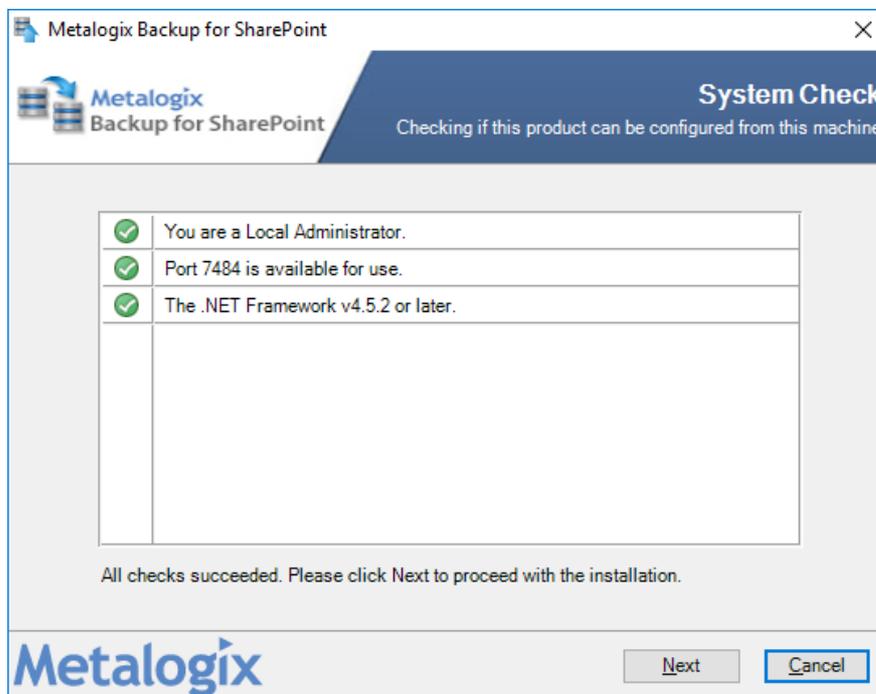
1. Log on to the computer where you want to install Metalogix Backup for SharePoint. You should use a user account that is a member of the local administrators group on the computer.

In addition, the account that you use must have the sysadmin role assigned for the SQL Server instance that hosts the Metalogix Backup for SharePoint repository database.

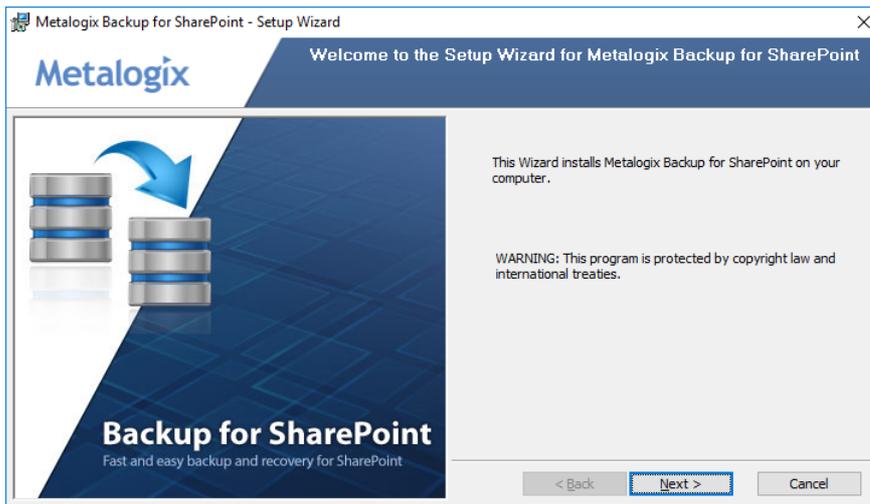
2. Unzip the installation files to a folder.
3. Locate and double click the **Metalogix Backup for SharePoint.exe** file.
4. Read the guides and then click the **Install Metalogix Backup for SharePoint** button.



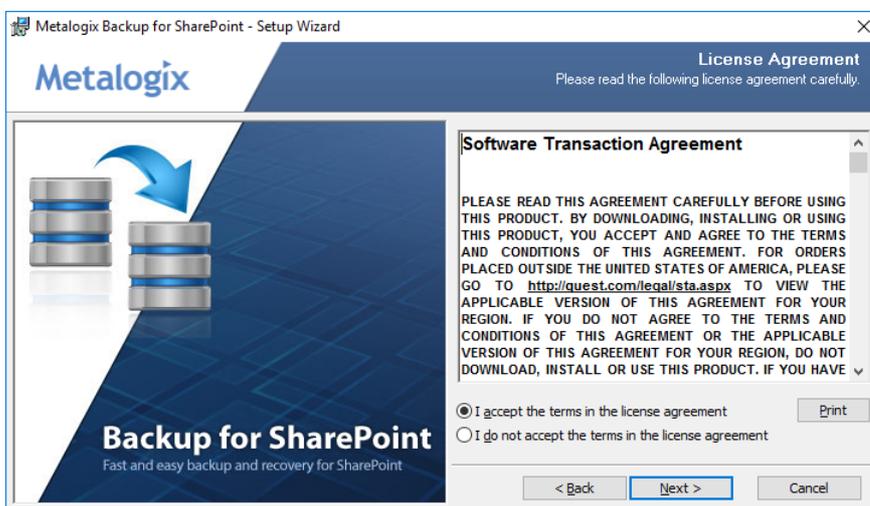
5. The **System Check** step appears. The Metalogix Backup for SharePoint installer bootstrap automatically runs a system check. Once the check has completed, you will either have to address the checks that did not pass.



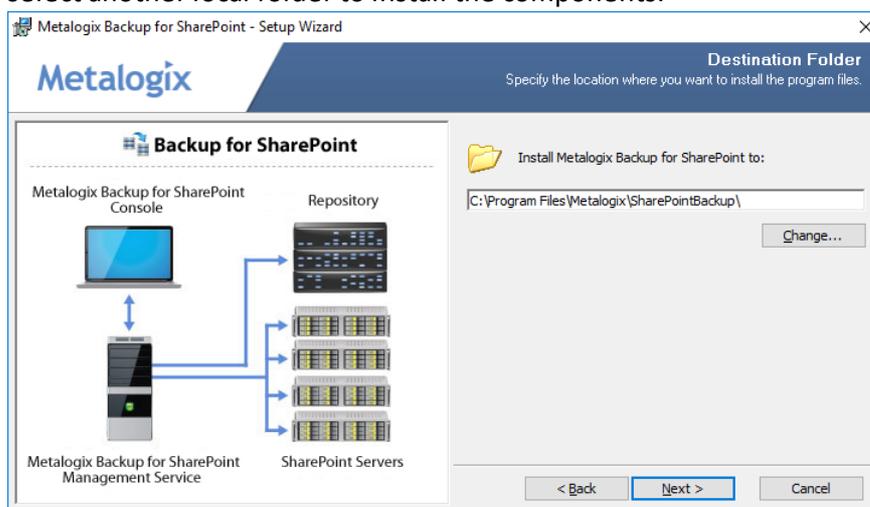
6. Click **Next**. The **Metalogix Backup for SharePoint - Setup Wizard** starts and the **Welcome** step appears.



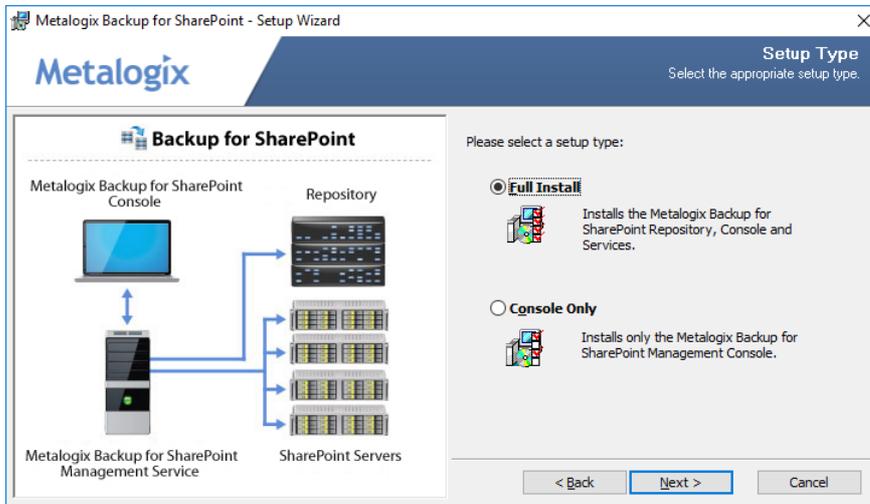
7. Click **Next**. The **License Agreement** step appears. Review the terms of the license agreement, and then click **I accept the terms in the license agreement**.



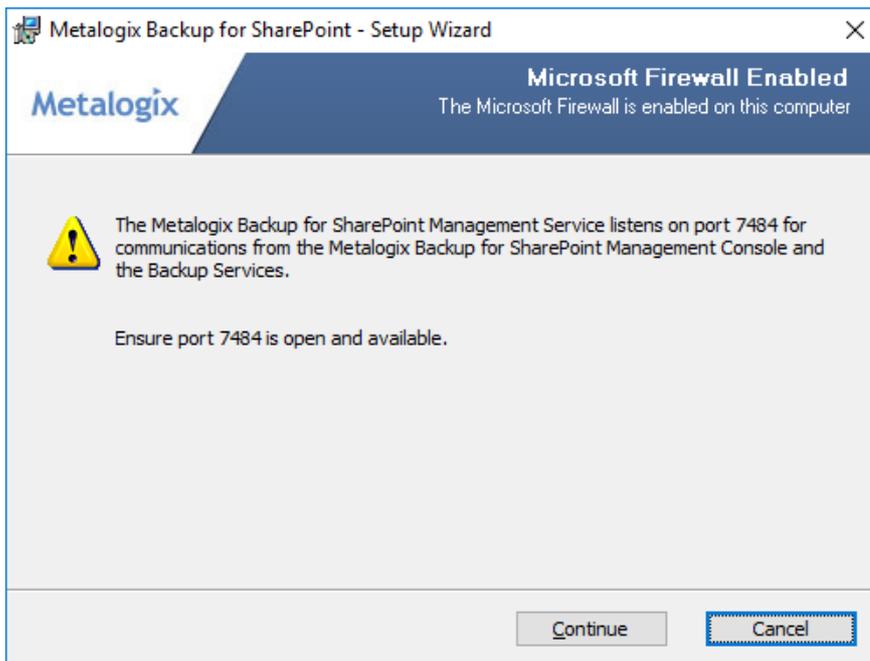
8. Click **Next**. The **Destination Folder** step appears. Accept the default location or click **Change** to select another local folder to install the components.



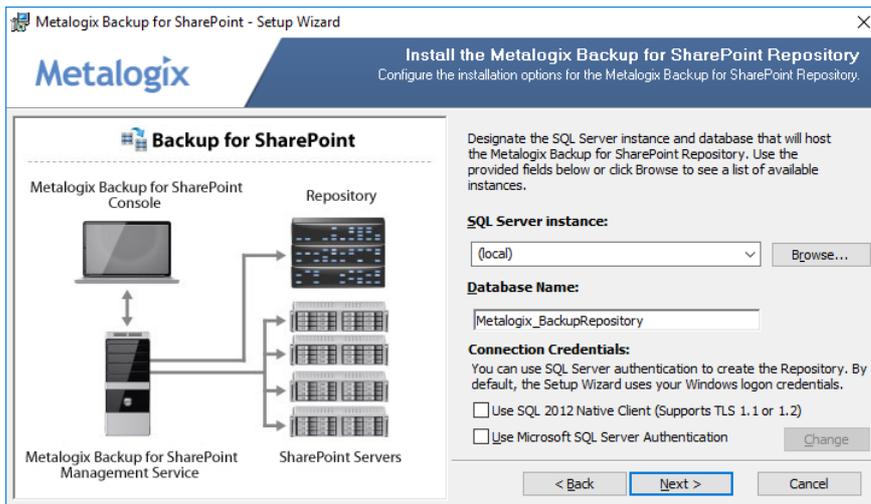
- Click **Next**. The **Setup Type** step appears. Click **Full Install** to install all Metalogix Backup for SharePoint components on a single computer or click **Console Only** to install only the Metalogix Backup for SharePoint Management Console.



- Click **Next**. If you selected **Full Install** 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.

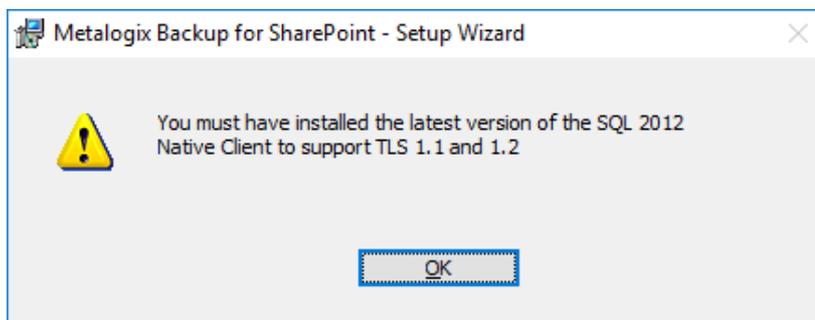


- Click **Continue**. The **Install the Metalogix Backup for SharePoint Repository** step appears.

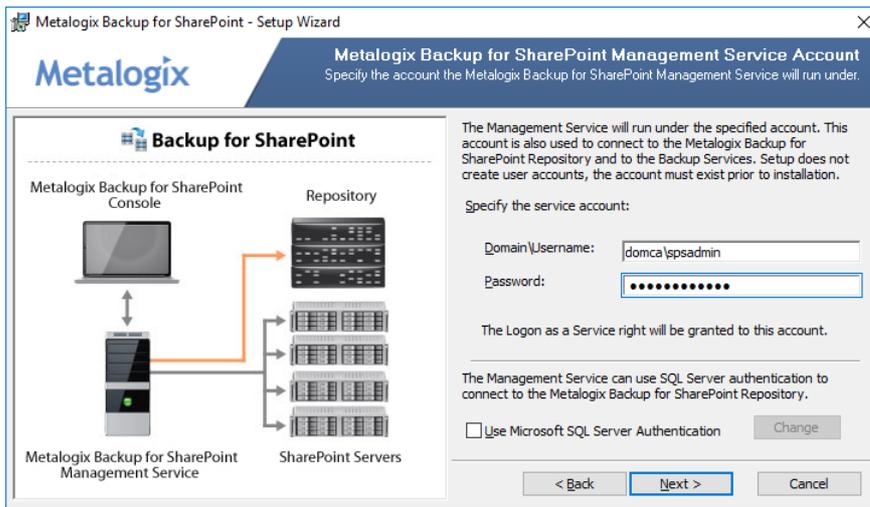


Enter the information as described below:

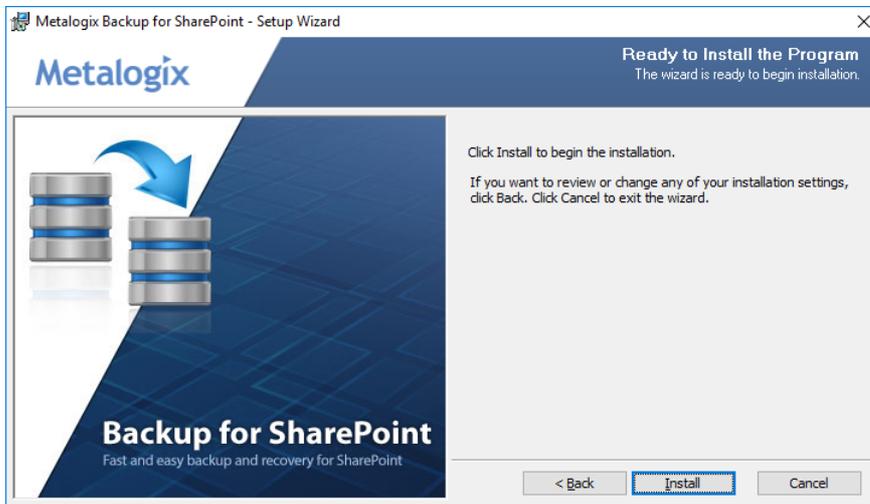
- a. **SQL Server instance** - locate a SQL Server instance that will host the repository. If the SQL server is co-located on the same computer, select **(local)** for SQL Server Instance.
- b. **Database Name** - accept the default name or enter a custom database name for the repository database.
- c. **Use SQL 2012 Native Client (Supports TLS 1.1 or 1.2)** - Select the check box if you want to use a TLS connection. When you select the check box, an information appears if you have not installed the SQL 2012 Native Client.



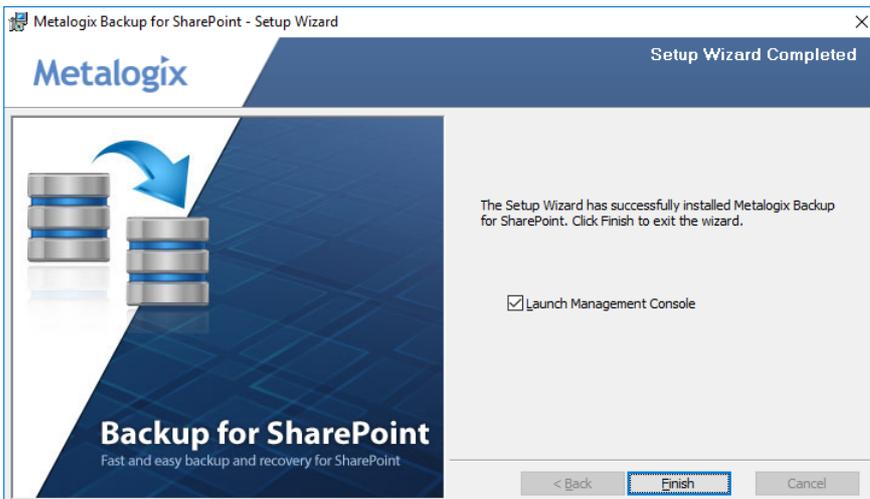
- d. **Use Microsoft SQL Server Authentication** - select this check box to specify the credentials that the Setup Wizard uses to connect to the SQL Server. Otherwise leave this check box unchecked to use the default Windows Authentication.
11. Click **Next**. The **Metalogix Backup for SharePoint Management Service Account** page appears. Specify the windows service account that will be used by the Management Service. If the SQL server requires SQL Server Authentication credentials then select Use Microsoft SQL Server Authentication and provide the credentials that the management service will use to connect to the repository database.



12. Click **Next**. The **Ready to Install the Program** step appears.



13. Click **Install**. When the installation completes, the **On Setup Wizard Completed** step appears. If you leave **Launch Management Console** selected, the **Metalogix Backup for SharePoint Management Console** starts.



14. Click **Finish** to close the **Metalogix Backup for SharePoint - Setup Wizard**.

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 Backup for SharePoint on a standalone farm, you must make certain changes to these settings to give Metalogix Backup for SharePoint access to both the farm components and its own components.

i | **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, 2016 or 2019.

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

- 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 Backup for SharePoint as described in the topic [Installing on a dedicated server](#) and run the Configuration wizard.

When you have completed the Configuration wizard, immediately quit the Management Console. In the Services Control Panel, change the login account for the SharePoint VSS Writer service to LocalSystem then restart the service. Before you install Metalogix Backup for SharePoint, the SharePoint VSS Writer service runs as Local Service. As part of the Configuration wizard, Metalogix Backup for SharePoint 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 Backup for SharePoint normally.

Installing the Backup Service

When you add additional components like a WFE server or a database server, you must install the Backup service on these components manually. 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.

There are two ways to install the Backup service manually:

- Use the Metalogix Backup for SharePoint Management Console

- Use the Metalogix Backup for SharePoint installer

i | **NOTE:** The first Backup Service that you install must always be on a WFE server. When you install a Backup Service you must specify the user name and password of the windows user account that is used by the Backup Service uses. The user account that you specify must have specific permissions for the farm.

Backup Service account Permissions

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 server.
- 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.

i | **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 Backup for SharePoint. The default database name is Metalogix_BackupRepository.

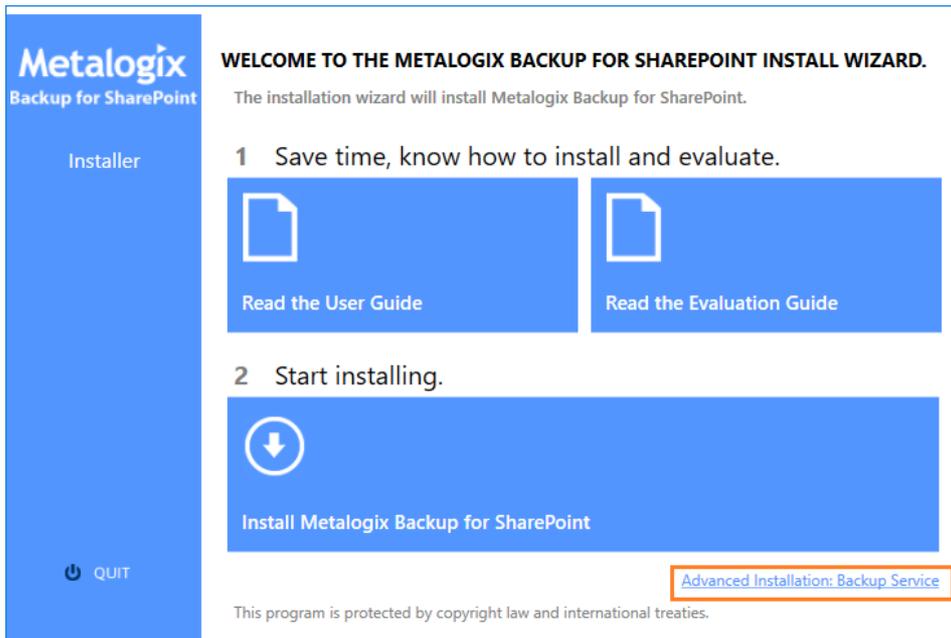
Steps to install the Backup Service with the Metalogix Backup for SharePoint installer

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

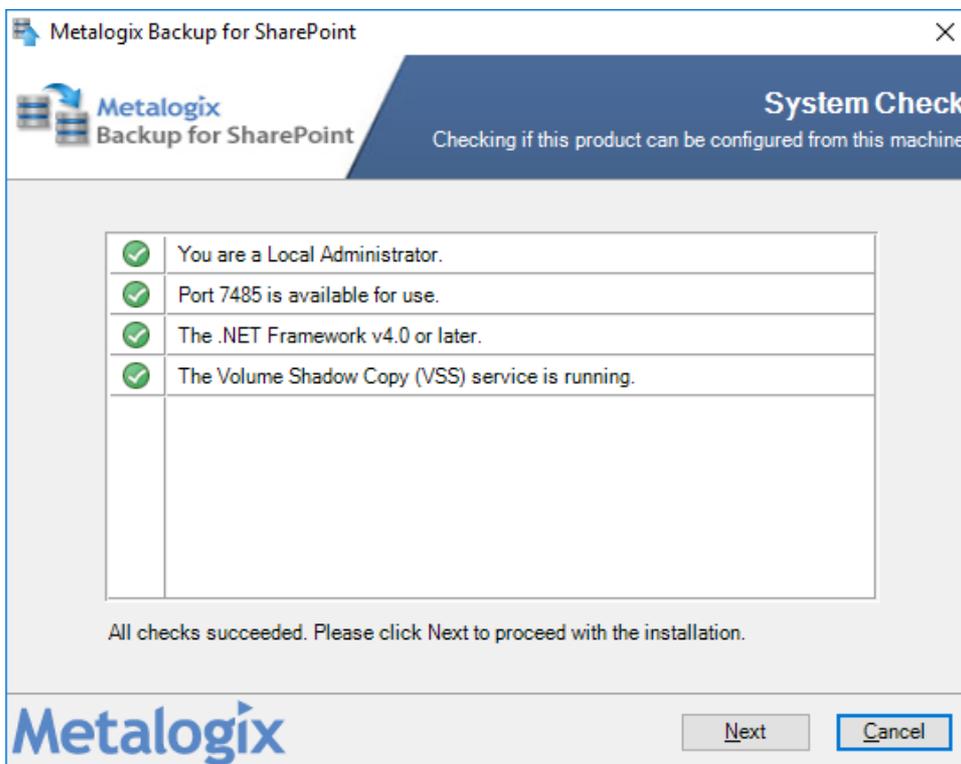
To use the Metalogix Backup for SharePoint installer to install the Backup Service

1. Use Windows Explorer to locate and double click the **Metalogix Backup for SharePoint.exe** file.

2. In the Install page, click **Advanced Installation: Backup Service**.

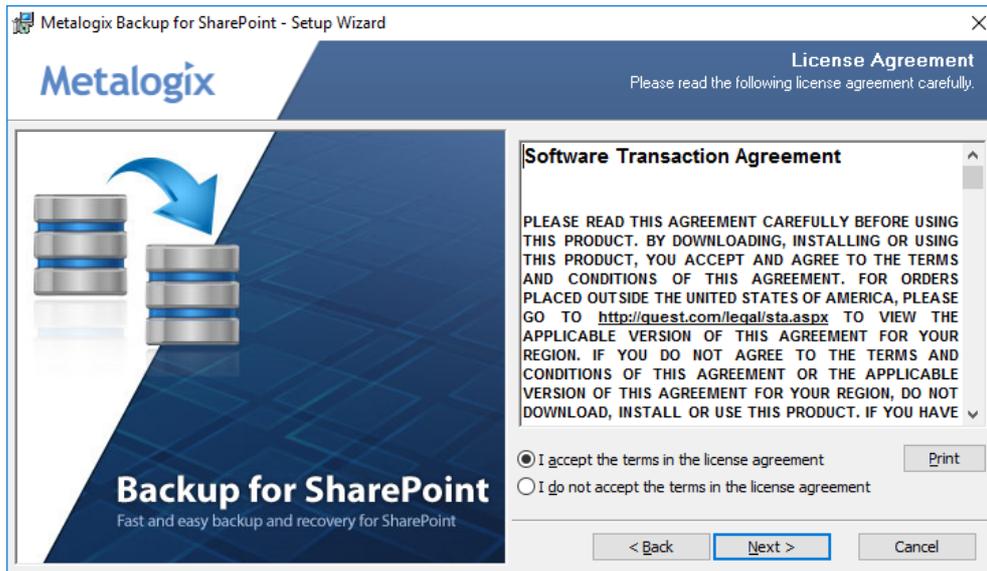


3. The **System Check** step appears. Metalogix Backup for SharePoint installation wizard automatically runs a system check. Once the system check has completed, you will either have to address the checks that did not pass and rerun the wizard, or if all checks have passed click **Next**.

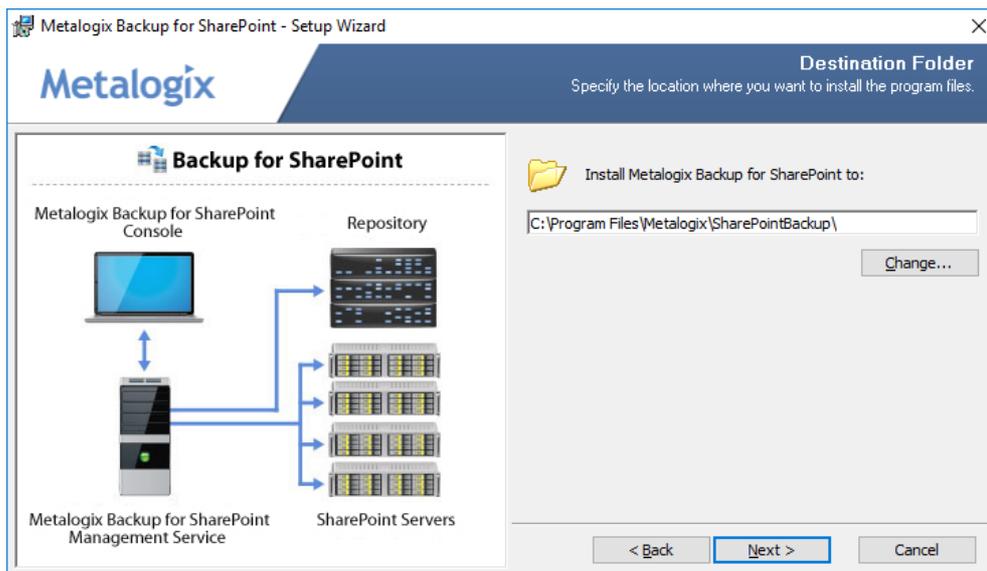


4. The **Metalogix Backup for SharePoint Service - Setup** wizard starts and the **Welcome** step appears.

5. Click **Next**. The **License Agreement** step appears. Read the license agreement and if you agree with the terms of the license, click **I accept the terms in the license agreement**.

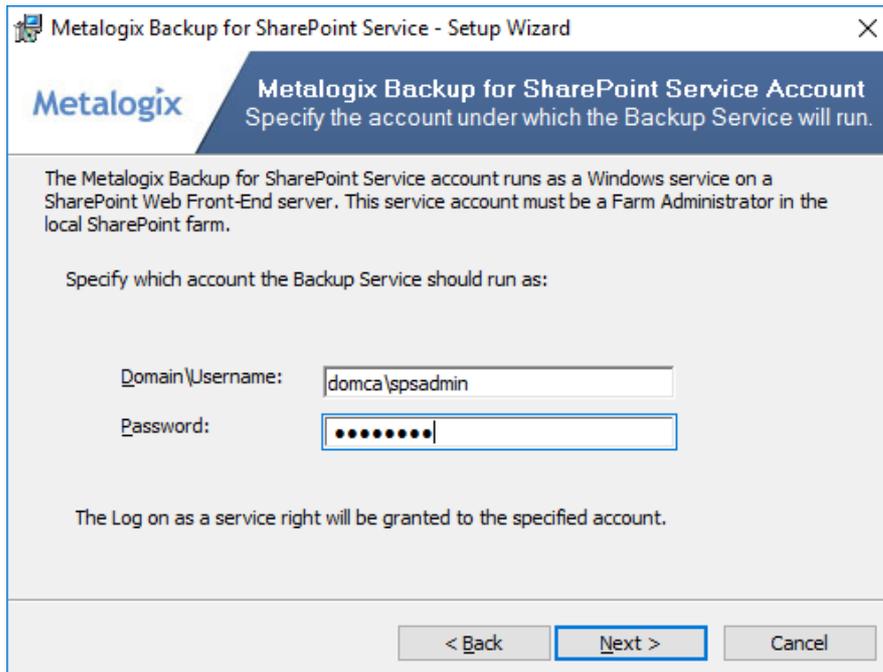


6. Click **Next**. The **Destination Folder** step appears. You can accept the default settings or click **Change** to specify a custom folder.



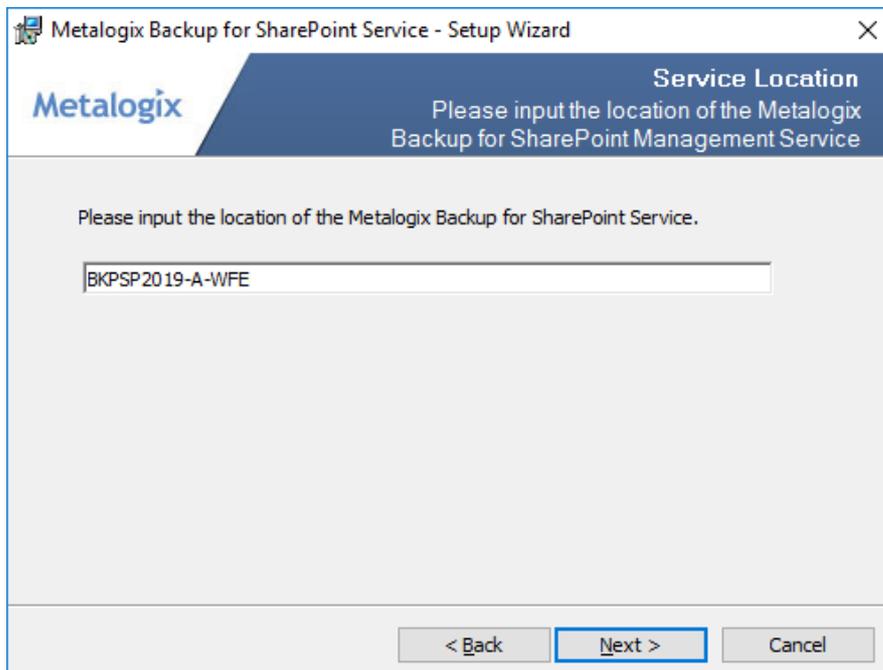
7. Click **Next**. The **Setup Type** step appears. Select Full Install to install

- Click **Next**. The **Service Account** step appears. Enter the credentials of the account that the Backup Service should use. Specify the user name in <domain name>\<user name> format.



The screenshot shows the 'Metalogix Backup for SharePoint Service - Setup Wizard' window. The title bar reads 'Metalogix Backup for SharePoint Service - Setup Wizard'. The window has a blue header with the Metalogix logo and the text 'Metalogix Backup for SharePoint Service Account Specify the account under which the Backup Service will run.' Below the header, there is a paragraph: 'The Metalogix Backup for SharePoint Service account runs as a Windows service on a SharePoint Web Front-End server. This service account must be a Farm Administrator in the local SharePoint farm.' Underneath, it says 'Specify which account the Backup Service should run as:'. There are two input fields: 'Domain\Username:' with the value 'domca\spsadmin' and 'Password:' with a masked password of ten dots. Below the fields, it states 'The Log on as a service right will be granted to the specified account.' At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted with a blue border.

- Click **Next**. The **Service Location** step appears. Enter the FQDN, NetBIOS name or IP address of the server that hosts the **Management service**.

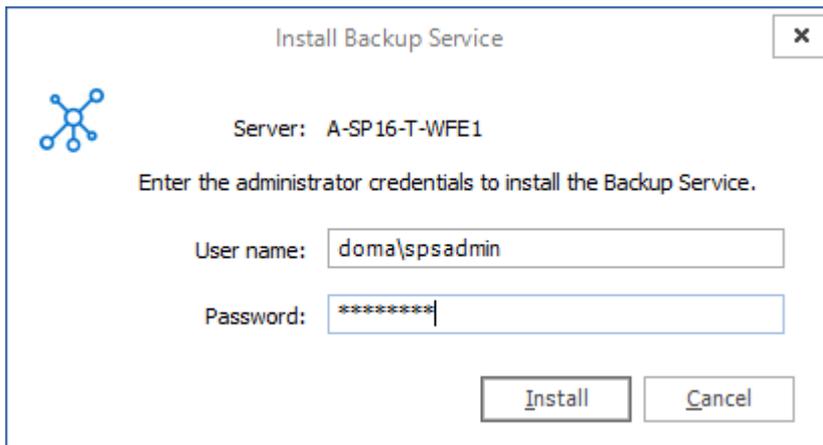


The screenshot shows the 'Metalogix Backup for SharePoint Service - Setup Wizard' window. The title bar reads 'Metalogix Backup for SharePoint Service - Setup Wizard'. The window has a blue header with the Metalogix logo and the text 'Service Location Please input the location of the Metalogix Backup for SharePoint Management Service'. Below the header, there is a paragraph: 'Please input the location of the Metalogix Backup for SharePoint Service.' There is one input field containing the text 'BKPSP2019-A-WFE'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted with a blue border.

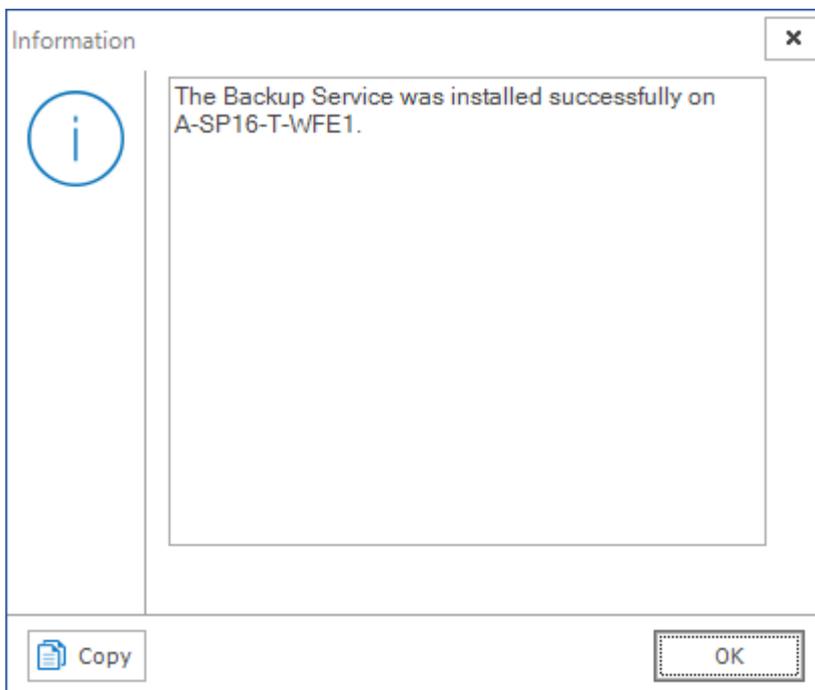
- Click **Next**. The **Ready to Install the Program** step appears. Click **Install** to begin the installation.
- In the **Setup Wizard Completed** step, click **Finish**.

Steps to install the Backup Service from the Management Console

1. From the Management Console workspace selector click **Configuration**.
2. In the **Configuration** pane, select the name of the WFE or another server where you want to install the Backup Service.
3. From the Configuration tab ribbon click **Install Backup Service**. The *Install Backup Service wizard* opens.



4. Enter the administrator credentials of the account that the Backup Service should use. Specify the user name in *<domain name>\<user name>* format.
5. Click **Install**. When the installation completes, the confirmation window opens.

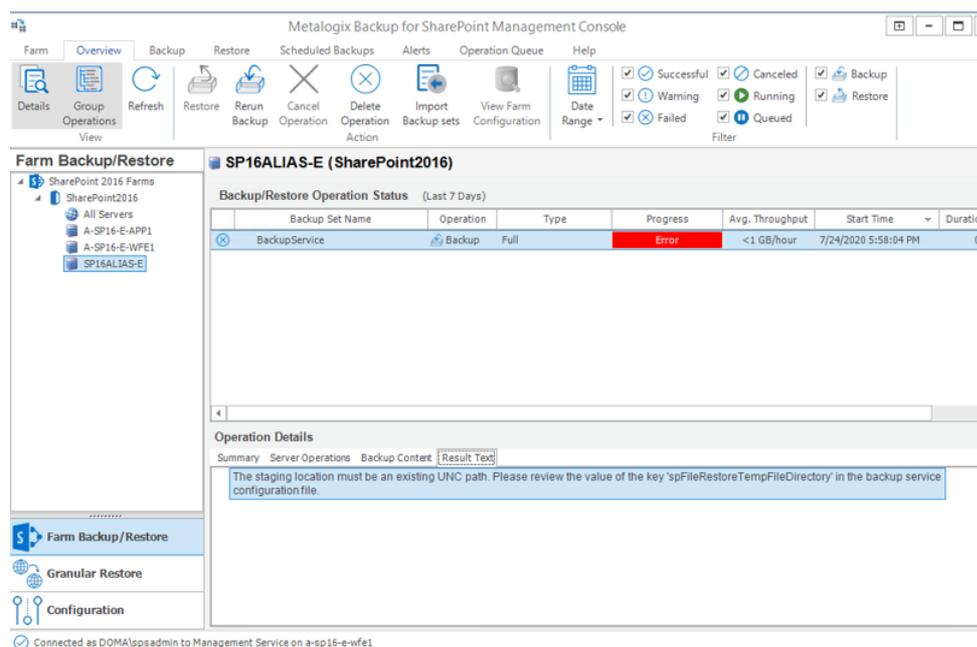


6. In the confirmation window, click **OK**.

Configuring the Backup Service staging location

The Backup Service uses a staging location to backup SharePoint data. During installation, the default location is configured as `C:\Users\\AppData\Local\Temp\` which is insufficient for a successful backup operation. You must specify a UNC path for the staging location.

If you specify an invalid UNC path during and upgrade or install you will get an error as shown below when you attempt a backup operation.



The error message appears in the Result Text tab of the Operations Detail pane: The staging location must be an existing UNC path. Please review the value of the key `spFileRestoreTempFileDirectory` in the Backup service configuration file.

Steps to review and change the staging location

1. Log in to the computer where Metalogix Backup for SharePoint has been installed.
2. Navigate to the Backup Service installation directory `C:\Program Files\Metalogix\SharePointBackupService`
3. Open the **PBBackupService.exe.config** file with Administrator privileges.
4. Inspect the **value** of the row **key=spFileRestoreTempFileDirectory**
5. If the value indicates a local path, you must change the path to a UNC path.
6. Save the changes to the configuration file and restart the **Backup Services**. If there are more instances of the backup Service on other computers, you must restart them as well.

Managing licenses

Metalogix Backup for SharePoint activates your license key during its installation by contacting a Metalogix server. Metalogix Backup for SharePoint 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 Backup for SharePoint does not collect data from that server.

i | **NOTE:** Trial licenses can be activated and reused after they have expired. You can add another trial license as well. Contact your Quest sales representative for more information.

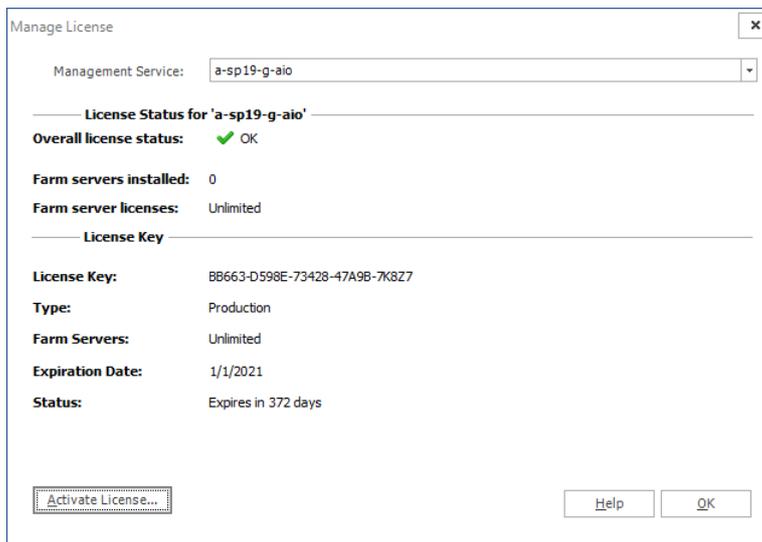
Steps to view the licensed servers

1. From the Management Console toolbar, click **Help > Manage License**.

or

From the Management Console workspace selector click **Configuration > Configuration tab > Manage License**.

2. From the Management Service drop down, select the server that hosts the management service to view the license status.

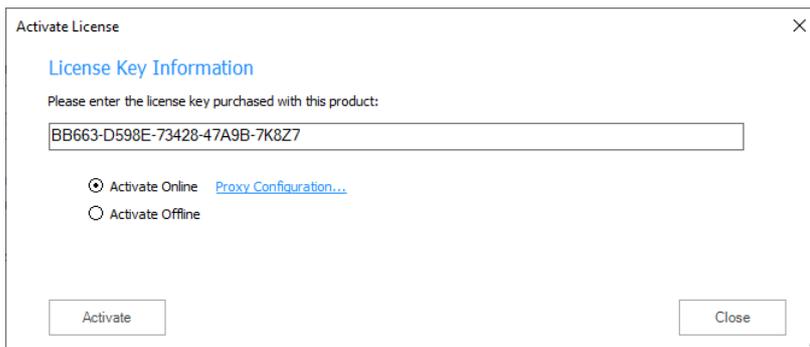


Steps to activate a License Key

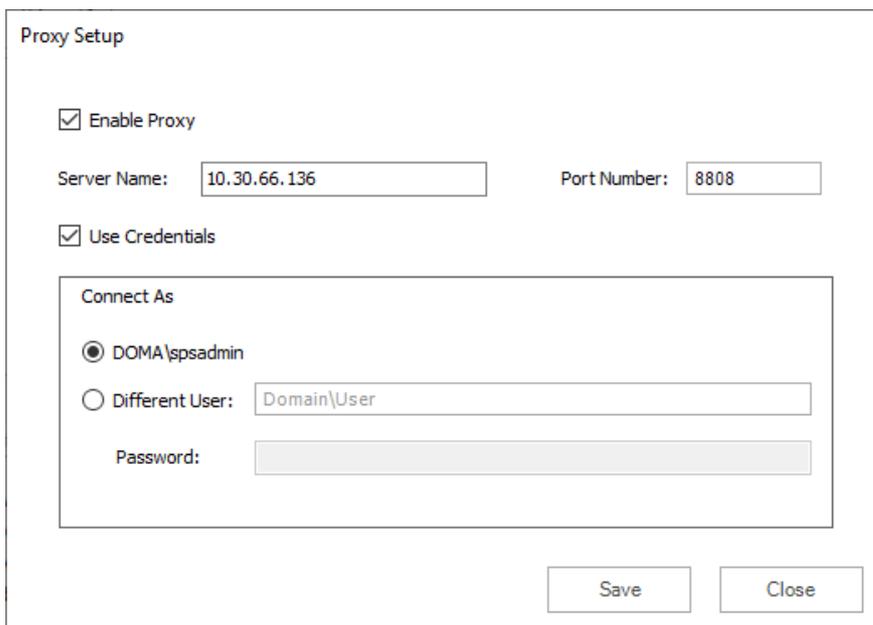
The first time that you open the Metalogix Backup for SharePoint Management Console, you will be prompted to activate a license key. Follow these steps to activate your license key:

Online activation

1. In the **Activate License** window, enter the license key.



2. If you want to activate the license online, select **Activate Online**, and then click **Activate**. If your computer is behind a firewall, click the **Proxy Configuration** link. The **Proxy Setup** dialog appears.



- a. Select **Enable Proxy**.
- b. In the **Server Name** field, enter the name of your proxy server.
- c. In the **Port Number** field, enter the port number of the proxy server.
- d. If your proxy server requires explicit login credentials, select **Use Credentials**.
- e. Choose the credentials of the logged in user or provide credentials of another user.

- f. Click **Save** to preserve the information, or click **Close** to return to the **License Key Information** dialog.
3. If the license key is validated successfully, the Metalogix Backup for SharePoint Management Console appears and the **Configuration Wizard** is displayed.

Offline activation

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

i NOTE: Installations using offline activation must be manually refreshed every 365 days.

1. In the **License Key** field, enter your license key.
2. Choose **Activate Offline**. The **License Information** page expands to display additional steps that are required.
3. **Step 1: Collect the activation data to the clipboard or to a file**
 - a. Select from the two options described below:

Option 1: Click **Copy Activation Data to Clipboard**. The activation data is saved to memory. Use this option if you plan to follow through with the subsequent steps immediately.

Option 2: Click **Save Activation Data to File**. The Windows File dialog appears. Use this option if you plan to activate the license at a later date.
 - b. Specify a file name for the activation data file.
 - c. Click **Save** to save the file to a location of your choice.
4. **Step 2: Submit collected data**
 - a. Click the URL provided. The **Offline Activation** web page appears.
 - b. Follow the instructions to get the **Activation Key file** (with the file extension DAT) is made available for download. Save this file to a location of your choice.
5. **Step 3: Paste Activation Response**
 - a. Click **Browse**. The Windows file dialog appears.
 - b. Locate the activation key file and click **Open**. The file appears in the **Activation Key File** field.
6. **Step 4: Activate offline**
 - a. Click the **Activate** button to complete the activation process.
7. Log out and log in again to access all licensed features.

Steps to update or add a license

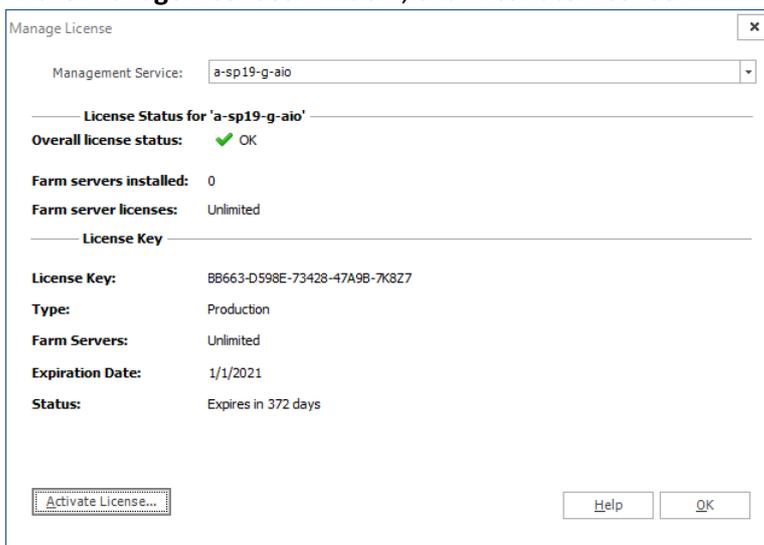
You may need to update a license when you increase the number of servers you want to monitor and you receive another license from Quest.

1. From the Management Console toolbar, click **Help > Manage License**.

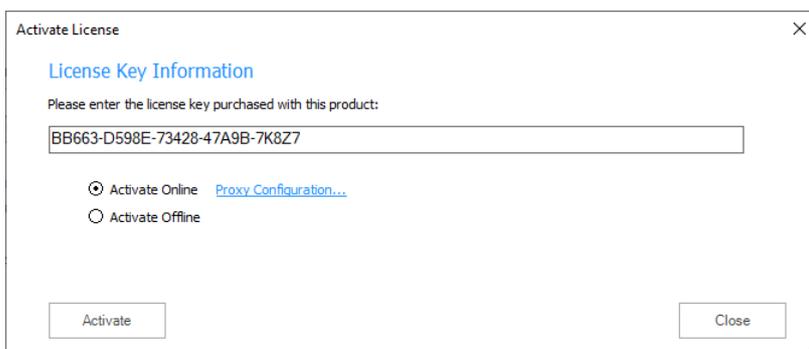
or

From the Management Console workspace selector click **Configuration > Configuration tab > Manage License**.

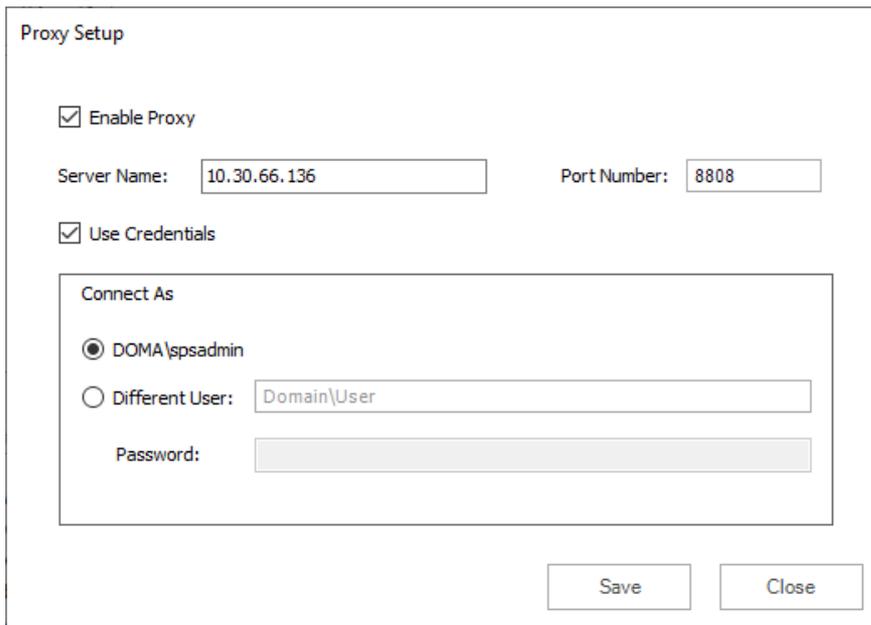
2. In the **Manage Licenses** window, click **Activate License**.



3. In the *Activate License* window, enter the license key.



4. If you want to activate the license online, select **Activate Online**, and then click **Activate**. If your computer is behind a firewall, click the **Proxy Configuration** link. The *Proxy Setup* window appears.



The image shows a 'Proxy Setup' dialog box. It has a title bar 'Proxy Setup'. Inside, there is a checked checkbox 'Enable Proxy'. Below it are two text boxes: 'Server Name:' containing '10.30.66.136' and 'Port Number:' containing '8808'. There is another checked checkbox 'Use Credentials'. Below that is a 'Connect As' section with two radio buttons. The first is selected and labeled 'DOMA\spsadmin'. The second is labeled 'Different User:' and has a text box containing 'Domain\User'. Below the radio buttons is a 'Password:' label and a text box. At the bottom right are two buttons: 'Save' and 'Close'.

- a. Select **Enable Proxy**.
 - b. In the **Server Name** field, enter the name of your proxy server.
 - c. In the **Port Number** field, enter the port number of the proxy server.
 - d. If your proxy server requires explicit login credentials, select **Use Credentials**.
 - e. Choose the credentials of the logged in user or provide credentials of another user.
 - f. Click **Save** to preserve the information, or click **Close** to return to the *Activate License* window.
5. If you want to activate the license offline, select **Activate Offline** and follow the steps outlined in the [Offline Activation](#) section.

i | **NOTE:** Offline activation is available for customers without an Internet connection or who want to review the information sent to Metalogix. Installations using offline activation must be manually refreshed every 365 days.

6. Metalogix Backup for SharePoint displays a message with the status of your activation.



Upgrading Metalogix Backup for SharePoint

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

i **TIP:** This version of Metalogix Backup for SharePoint 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 <https://support.quest.com> for assistance with upgrades.

In this topic:

- [Preparing for an upgrade](#)
- [Steps to perform a standard upgrade](#)
- [Steps to perform a custom upgrade](#)
- [Steps to upgrade the Backup Service instances](#)
- [Steps to use the Management Console wizard to upgrade all Backup Service instances](#)
- [Steps to use the installer wizard to manually upgrade a Backup Service](#)
- [Configuring the Backup Service staging location](#)
- [Upgrading the Self-Service Recovery feature](#)

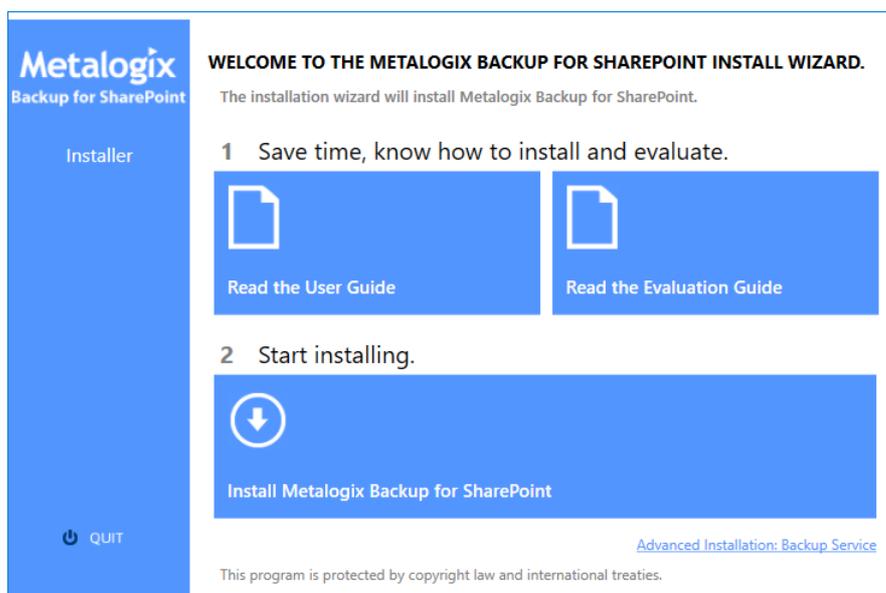
Preparing for an upgrade

1. Ensure the computers on which you want to upgrade Metalogix Backup for SharePoint meet or exceed the product requirements. For more information see [Product Requirements](#).
2. Ensure that the account that you use to log on to the computers that host the Metalogix Backup for SharePoint components also has administrator privileges on the repository database.
3. Identify the upgrade path your environment requires. For more information, see What upgrade options are available?
4. Temporarily disable any scheduled jobs and allow any currently running or queued backup/restore operations to complete.
5. Close all open applications on the Metalogix Backup for SharePoint component hosts.
6. Ensure that the .NET framework 4.0 is running on the target computer.

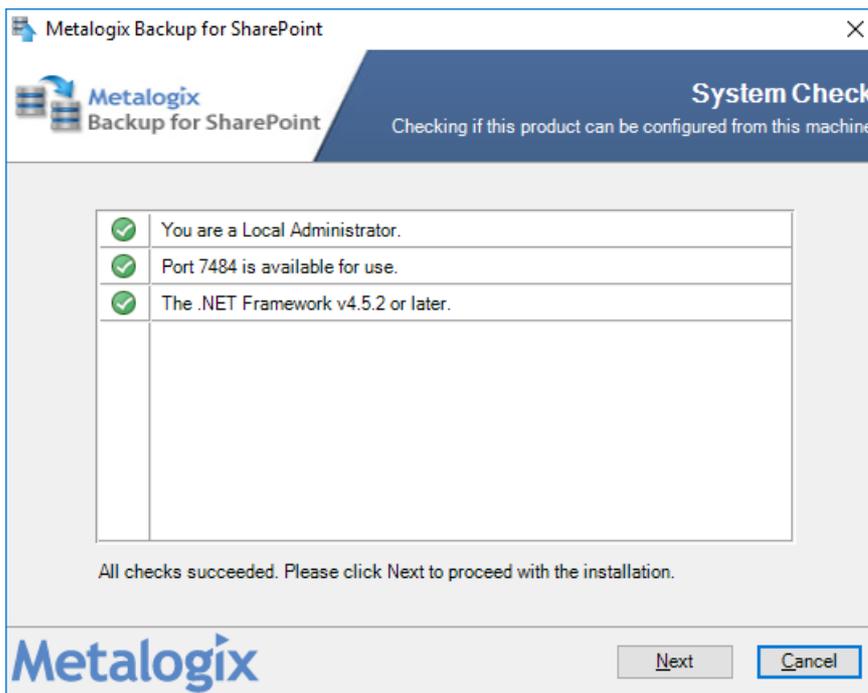
7. If you plan to use farm backups for your SharePoint 2010, 2013, 2016 or 2019 farm, use the Management Console to deploy additional Backup Service instances on every Web front end (WFE) and database server in the farm. For more information about this installation, see [Installing the Backup Service manually](#).
8. If you deployed the Metalogix Backup for SharePoint Self Service Recovery solution, remove the Web part and use the SharePoint administration tools to retract the solution package. 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 installation, see [Manually installing the Self-Service Recovery feature](#).
9. Upgrade your installation to Metalogix Backup for SharePoint by choosing the appropriate upgrade path:
 - a. **Standard upgrade** - In a single-server deployment, the Management Console, Repository database, Management Service and Backup Service are installed on the same computer. You can use the upgrade wizard to upgrade your installation to the new version of Metalogix Backup for SharePoint if you have a single-server deployment or if you are upgrading from a trial installation. See [Steps to perform a standard upgrade](#).
 - b. **Custom upgrade** - In a distributed deployment, the components will be on different computers. See [Steps to perform a custom upgrade](#).

Steps to perform a standard upgrade

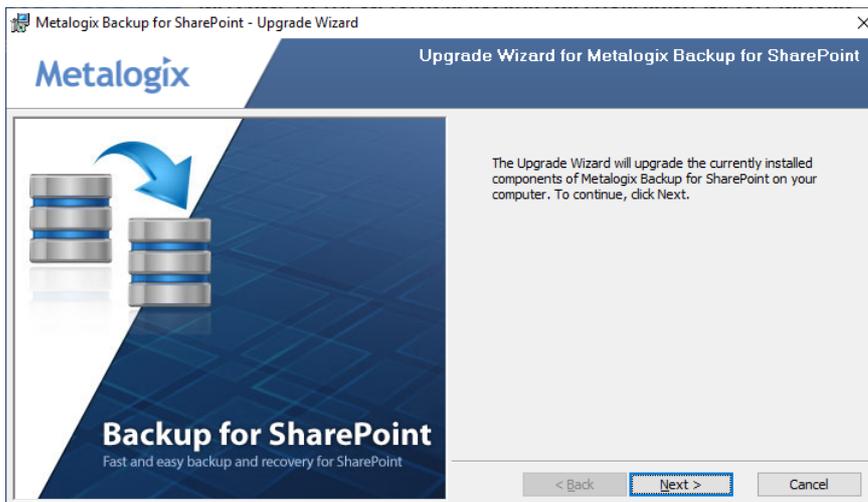
1. Log in to the computer where you want to install Metalogix Backup for SharePoint. You should use a user account that is a member of the local administrators group on the computer. In addition, the account that you use must have the sysadmin role assigned for the SQL Server instance that hosts the Metalogix Backup for SharePoint repository database.
2. Download and unzip the upgrade files to a folder.
3. Locate and double click the **Metalogix Backup for SharePoint.exe** file. The installer bootstrap window opens.



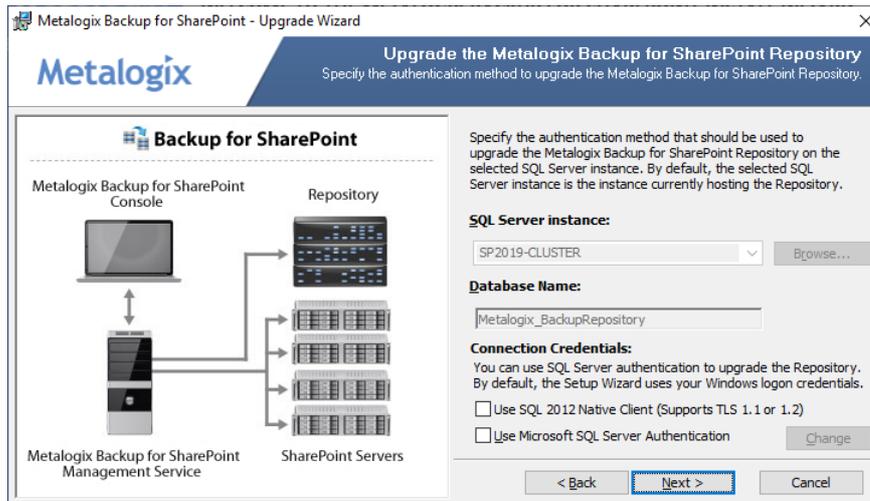
4. Click **Install Metalogix Backup for SharePoint**. The *System Check* window opens.



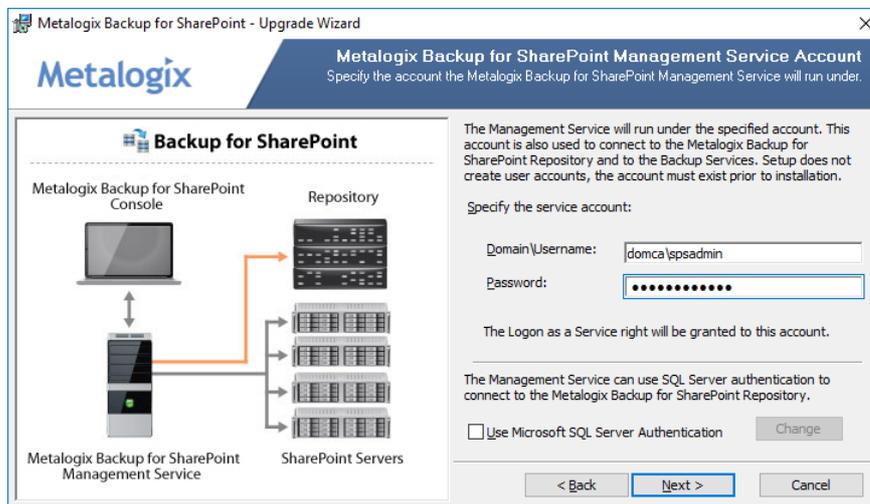
5. You must address the system check failures if any. When all checks succeed, click **Next**. The *Upgrade Wizard for Metalogix SharePoint* opens.



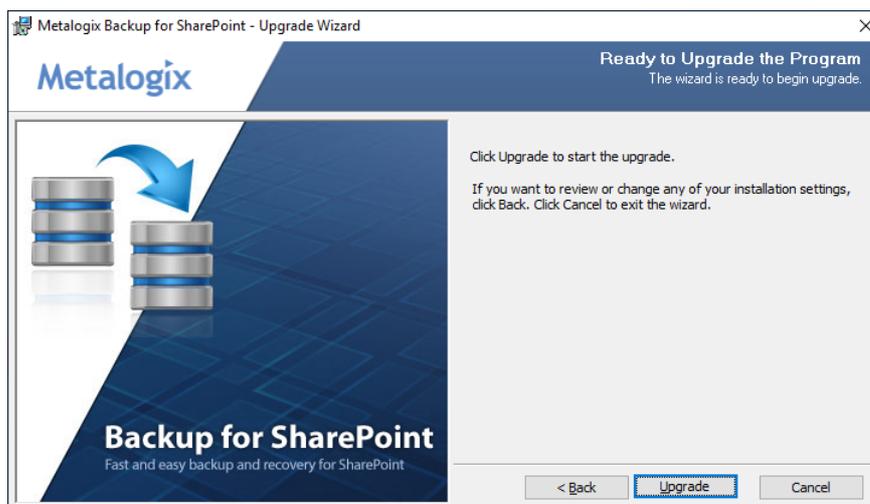
6. Click **Next**. The *Upgrade the Metalogix Backup for SharePoint Repository* window opens.



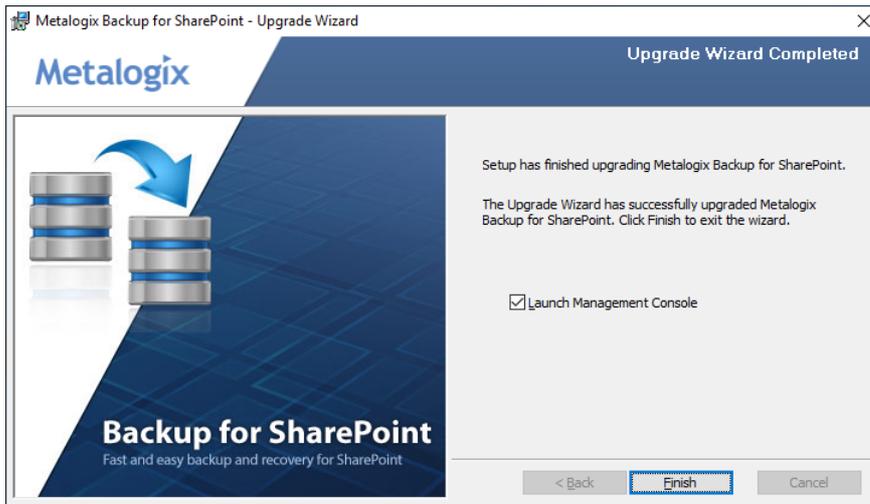
7. Click **Next**. The *Metalogix Backup for SharePoint Management Service Account* window opens.



8. Click **Next**. The *Ready to upgrade the program* window opens.



- Click **Upgrade**. Wait until the **Upgrade Wizard Completed** window opens.



- Select **Launch Management Console** and click **Finish**.
- Upgrade all previously deployed Backup Service instances. See [Steps to upgrade the Backup Service instances](#).

Steps to perform a custom upgrade

- Perform a standard upgrade on the primary host that has the Management Service. See [Steps to perform a standard upgrade](#).
- Upgrade all previously deployed Backup Service instances. See [Steps to upgrade the Backup Service instances](#).
- Upgrade additional installations of the Management Console by running the Metalogix Backup for SharePoint upgrade wizard on each host computer.

Steps to upgrade the Backup Service instances

The Management Console, Management Service and the Backup Service require the same version otherwise no backup or restore operation can occur. You can upgrade the Backup Service in two ways:

- Use the Management Console** - The first time that you open the Management Console after an upgrade, the Management Console prompts you to upgrade either the primary Backup Service or all Backup Services that lets you upgrade the services that you may have deployed on other machines. If you choose to upgrade only the primary Backup Service, you must use the Metalogix Backup for SharePoint installer on each Backup Service host to manually upgrade the secondary Backup Service instances.

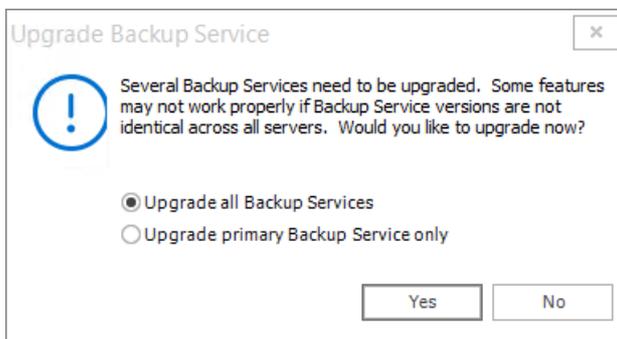
CAUTION: If you choose to upgrade all backup services using the Management Console service upgrade wizard, make sure that all the services use the same windows credentials. If you have deployed additional Backup services on other host computers with different windows credentials, then the choice to upgrade all backup services using the Management

Console will overwrite the windows credentials of all the services with the credentials that you specify in the upgrade wizard. If you have deployed additional Backup services on other host computers with different windows credentials, you can upgrade only the primary Backup Service using the Management Console service upgrade wizard, and then use the Metalogix Backup for SharePoint installer on each Backup Service host to manually upgrade the additional Backup Service instances.

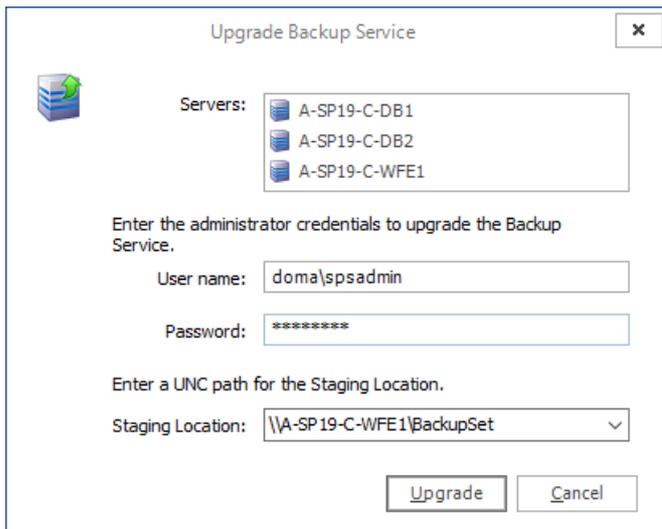
- **Use the Metalogix Backup for SharePoint installer** - You can also run the Metalogix Backup for SharePoint installer on each computer that hosts the Backup Service to manually upgrade the service. This method is particularly useful if each Backup service uses a different windows account credentials.

Steps to use the Management Console wizard to upgrade all Backup Service instances

1. Open the Management Console. The *Upgrade Backup Service* wizard opens when you open the Management Console for the first time after a standard upgrade.



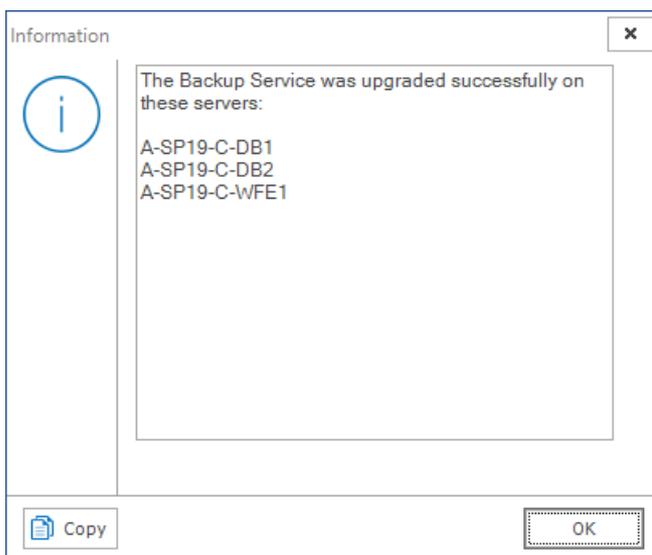
2. Choose an upgrade option as described below:
 - a. **Upgrade all Backup Services** - upgrades all Backup Services across all hosts where they are deployed.
 - b. **Upgrade primary Backup Service only** - upgrades only the primary Backup Service.
3. Click **Yes**. The *Backup Service configuration* window opens. If you select **No**, the Backup services will not be upgraded. You can open the wizard from the **Configuration** workspace in the Management console.



4. The Servers list displays all the servers where backup Services are installed. Enter the information as described below:
 - a. **User name** - the windows administrator account name used to run the service.
 - b. **Password** - the windows administrator account password.
 - c. **Staging Location** - enter or choose an existing UNC path. You cannot use a local path and you cannot leave this field empty.

! **CAUTION:** All Backup Service account credentials will be upgraded with the credentials you enter. If you have deployed additional Backup Services on other host computers with different account credentials, you must upgrade only the primary Backup Service using the Management Console service upgrade wizard, and then use the Metalogix Backup for SharePoint installer on each Backup Service host to manually upgrade the additional Backup Service instances.

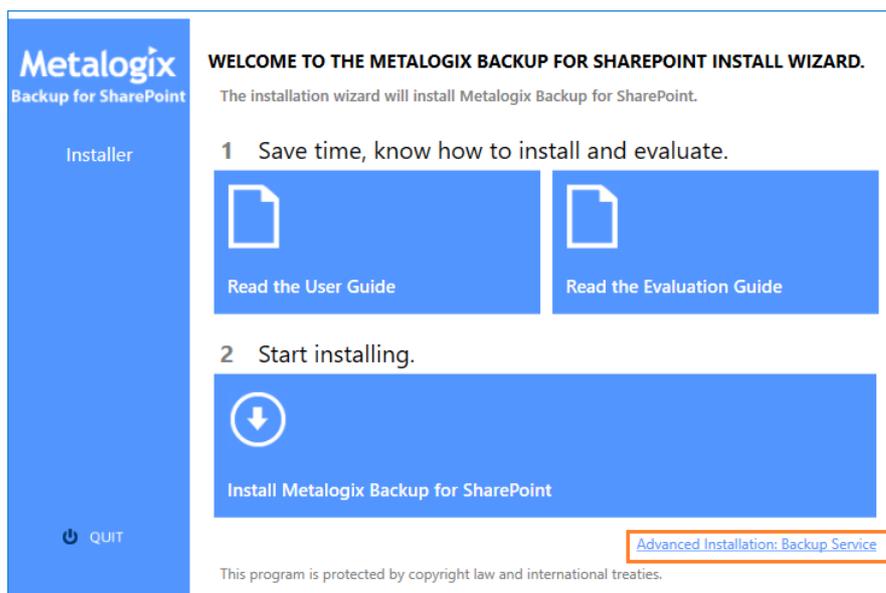
5. Click **Upgrade**. The confirmation window opens indicating the servers where the Backup Service was upgraded.



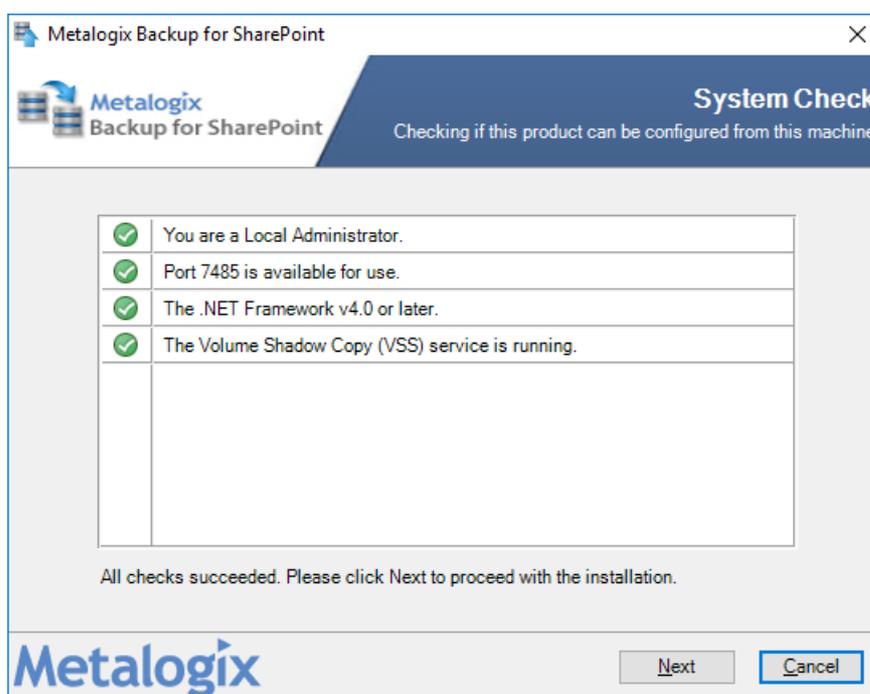
6. In the confirmation window, click **OK**.

Steps to use the installer wizard to manually upgrade a Backup Service

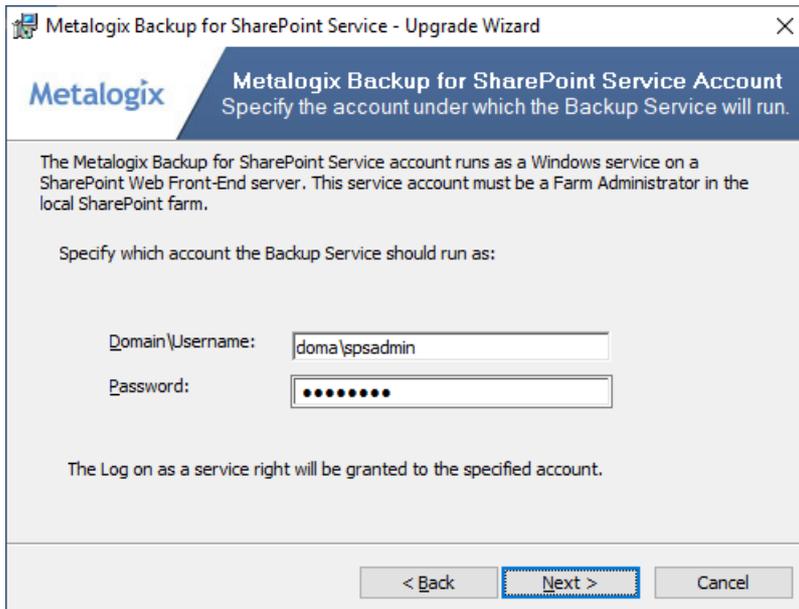
1. Log in to the computer where you want to install Metalogix Backup for SharePoint. You should use a user account that is a member of the local administrators group on the computer. In addition, the account that you use must have the sysadmin role assigned for the SQL Server instance that hosts the Metalogix Backup for SharePoint repository database.
2. Download and unzip the upgrade files to a folder.
3. Locate and double click the **Metalogix Backup for SharePoint.exe** file. The installer bootstrap window opens.



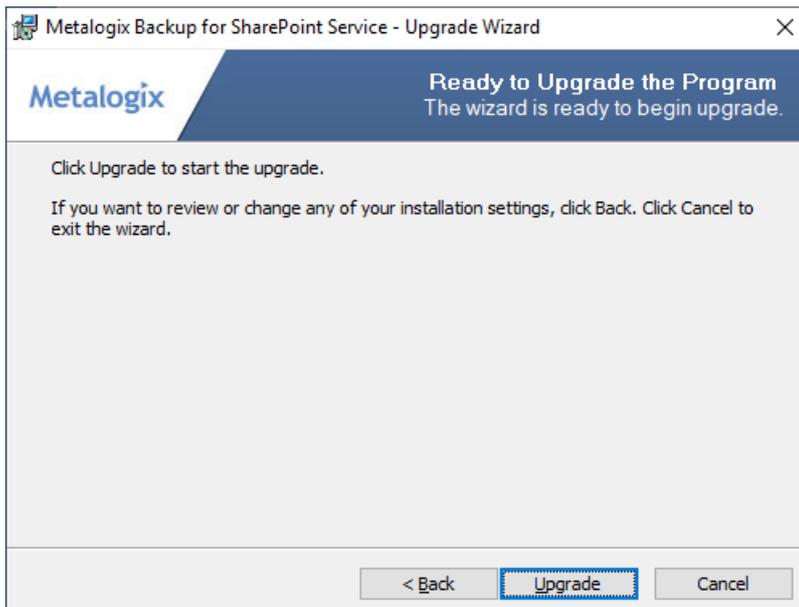
4. Click **Advanced Installation: Backup Service**. The *System Check* window opens.



5. You must address the system check failures if any. When all checks succeed, click **Next**. The *Metalogix Backup for SharePoint Service Account* window opens.



6. Click **Next**. The *Ready to Upgrade the Program* window opens.



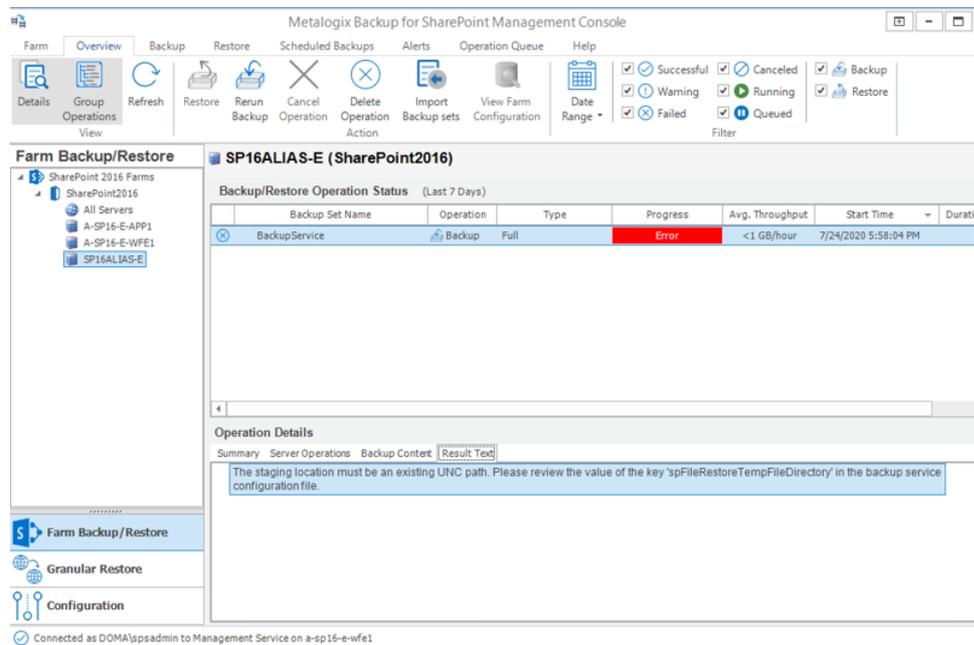
7. Click **Upgrade**. The *Setup wizard Completed* window opens.
8. Verify that the upgrade was successful and click **Finish** to close the wizard. Then click **Quit** to exit the installer bootstrap.

Configuring the Backup Service staging location

The Backup Service uses a staging location to backup SharePoint data. During installation, the default location is configured as `C:\Users\<username>\AppData\Local\Temp\` which is

insufficient for a successful backup operation. You must specify a UNC path for the staging location.

If you specify an invalid UNC path during and upgrade or install you will get an error as shown below when you attempt a backup operation.



The error message appears in the Result Text tab of the Operations Detail pane: The staging location must be an existing UNC path. Please review the value of the key `spFileRestoreTempFileDirectory` in the Backup service configuration file.

Steps to review and change the staging location

1. Log in to the computer where Metalogix Backup for SharePoint has been installed.
2. Navigate to the Backup Service installation directory `C:\Program Files\Metalogix\SharePointBackupService`
3. Open the **PBBackupService.exe.config** file with Administrator privileges.
4. Inspect the **value** of the row **key=spFileRestoreTempFileDirectory**
5. If the value indicates a local path, you must change the path to a UNC path.
6. Save the changes to the configuration file and restart the **Backup Services**. If there are more instances of the backup Service on other computers, you must restart them as well.

Upgrading the Self-Service Recovery feature

When you upgrade Metalogix Backup for SharePoint, 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 [Manually installing the Self-Service Recovery feature](#).

Configuring Metalogix Backup for SharePoint

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

- Opening the Management Console
- Connecting a standalone Management Console to the Management Service
- Configuring Metalogix Backup for SharePoint 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 Management Console to configure Metalogix Backup for SharePoint and to back up and restore SharePoint content.

When you open the Management Console, it checks for a connection to the 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 Backup for SharePoint, 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 Management Console.

To open the Management Console

1. At the Microsoft Windows desktop, click **Start > All Programs > Metalogix > SharePoint Backup > 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 Backup for SharePoint, 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 Management Console prompts you to add a farm if none exists in the Metalogix Backup for SharePoint 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 Management Console and the Management Service on the same computer, the Management Console contacts the local Management Service automatically.

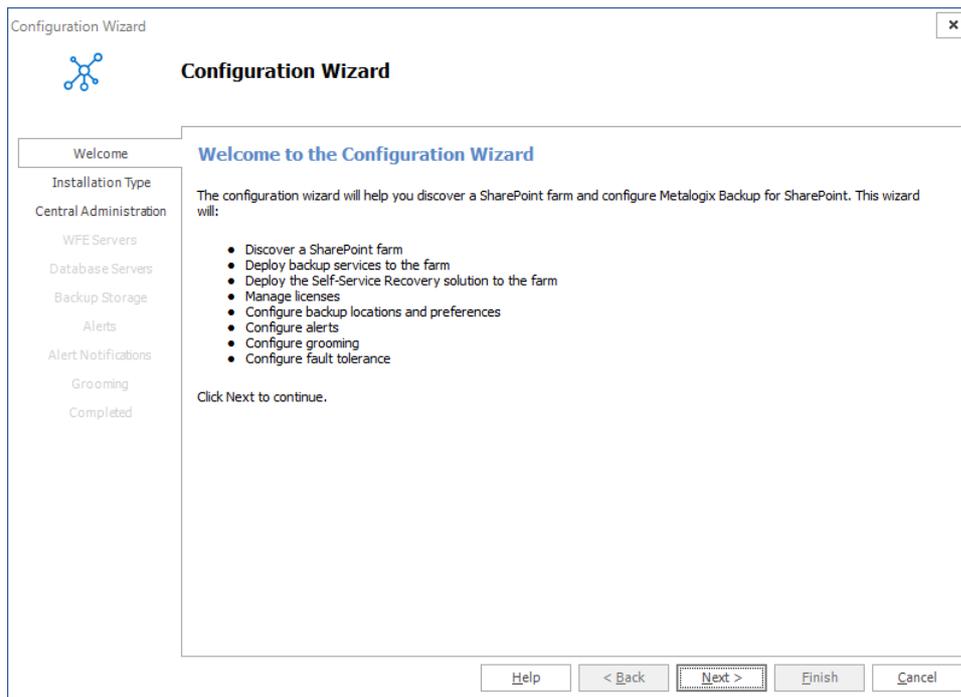
Permissions required for the Management Console

The 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.

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

Configuring Metalogix Backup for SharePoint for your farm

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



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

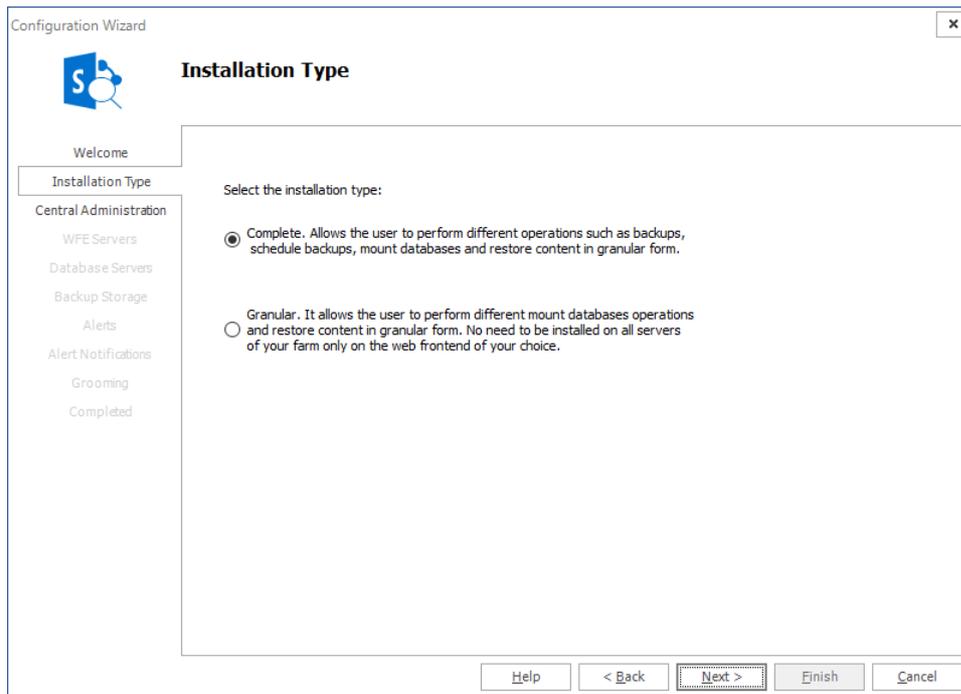
- Connect Metalogix Backup for SharePoint to the SharePoint farm.
- Install one or more Backup Service instances.
- Optionally deploy the Self-Service Restore feature.
- Configure the Metalogix Backup for SharePoint settings.
- Set up alerts and notifications.
- Configure grooming and fault tolerance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

Use the **Configuration 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.

Selecting the Installation Type

The first step is to choose the installation type.



There are two options:

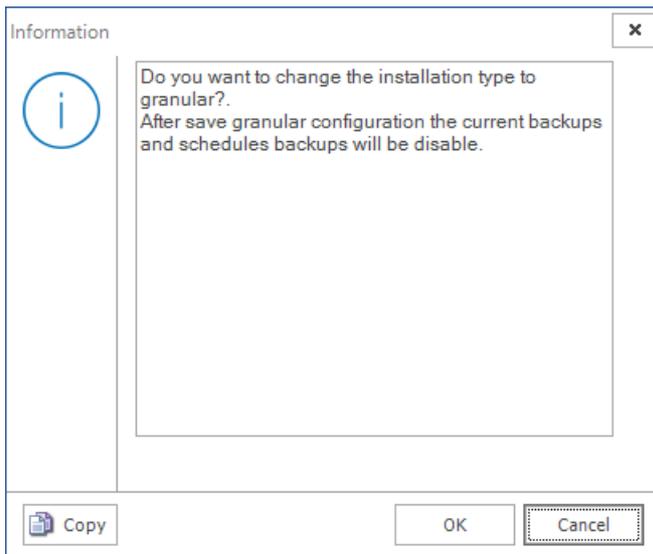
Complete You can perform the full range of operations on all SharePoint servers in a farm. You can perform various backups, you can schedule backups, mount databases and perform granular restore operations. Every time you add a farm and choose this option all other servers in the farm will allow the full set of operations.

Granular You can restrict the operations that can be performed on SharePoint servers in a farm with this option. Every time you add a farm using this option, every SharePoint server in that farm will be restricted to granular restore operations only. Backups and scheduled backups are not allowed.

Click **Next** to proceed.

If you choose the **Complete** option, the Central Administration window appears. For more information see [Specifying the Central Administration settings](#).

If you choose the **Granular** option, a confirmation dialog appears.



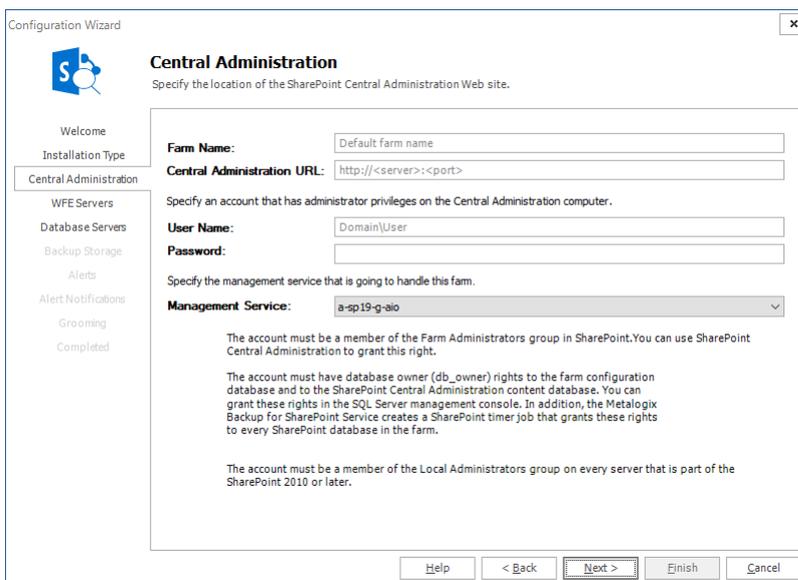
Click **OK**. The Farm Configuration window appears. For next steps see [Specifying Farm Connection Settings](#).

Specifying the Central Administration settings

Use the Configuration wizard to specify how Metalogix Backup for SharePoint 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 Backup for SharePoint uses to connect to the farm.

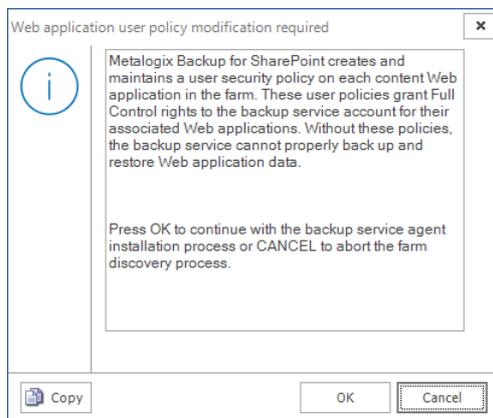
How do I specify the URL and the account to use?

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 Backup for SharePoint 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 manage the farm that will be added. Click **Next**.
5. In the **Web application user policy modification required** window, click **OK**.



What permissions does the specified account require?

The specified account needs the following permissions:

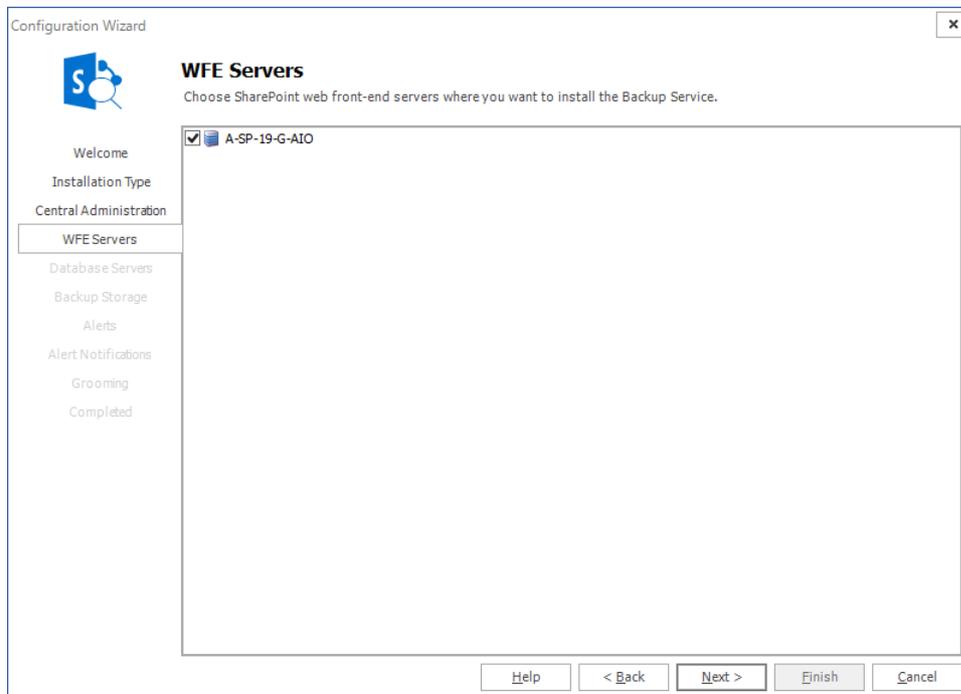
- Must be a member of the SharePoint farm administrators group.
- Must be a local administrator on the computer that hosts the Backup Service.
- Must have at least **db_owner** permissions for all SharePoint content databases, including the **Admin Content** and **SharePoint Config** databases

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.

i **NOTE:** *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 Backup for SharePoint. The default database name is Metalogix_BackupRepository..

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 Backup for SharePoint 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, 2016 or 2019 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.

i | **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 where you want to install the Backup Service](#).

You can also use the Metalogix Backup for SharePoint 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 Backup for SharePoint 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 [Learning about the 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.

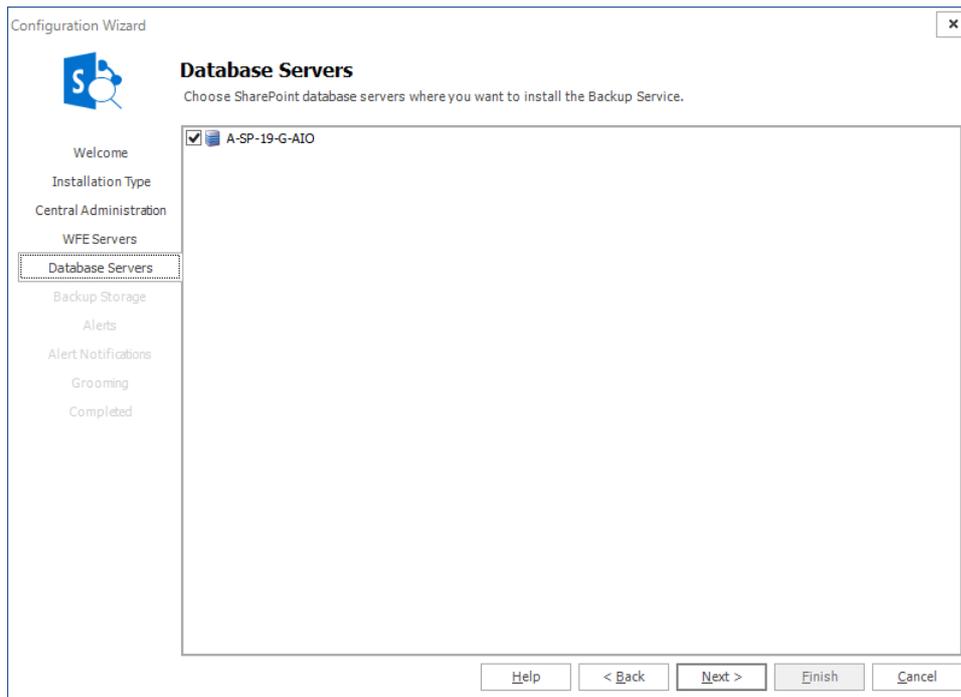
In the WFE Servers page of the Configuration wizard, review the selected servers, then click **Next**.

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 where you want to install the Backup Service

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 Backup for SharePoint 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, 2016 or 2019 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.

i **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 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 Backup for SharePoint 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**.

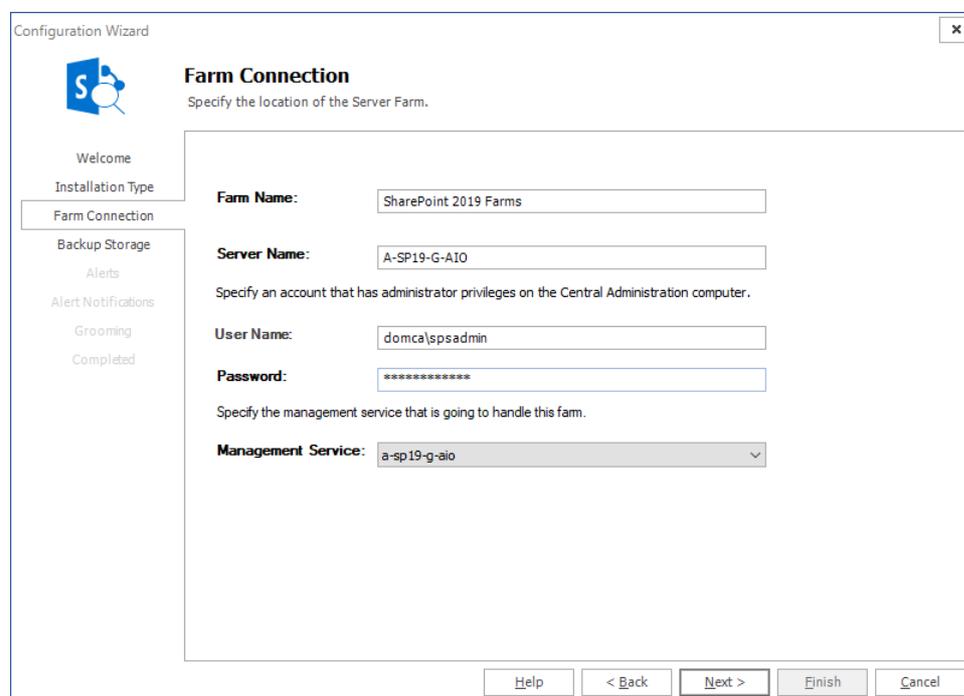
Can I manually install additional Backup Service instances?

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 Management Console. For more information about installing the Backup Service manually, see [Installing the Backup Service manually](#).

Specifying Farm Connection Settings

This window appears only when the **Granular** option has been selected in the **Installation Type** step of the Configuration Wizard.



The screenshot shows the 'Configuration Wizard' window with the 'Farm Connection' step selected. The window title is 'Configuration Wizard' and it has a close button (X) in the top right corner. The main content area is titled 'Farm Connection' with the subtitle 'Specify the location of the Server Farm.' On the left, there is a navigation pane with the following steps: Welcome, Installation Type, Farm Connection (selected), Backup Storage, Alerts, Alert Notifications, Grooming, and Completed. The main area contains the following fields and instructions:

- Farm Name:** SharePoint 2019 Farms
- Server Name:** A-SP19-G-AIO
- User Name:** domca\spsadmin
- Password:** [masked with asterisks]
- Management Service:** a-sp19-g-aio (selected from a dropdown menu)

Instructions include: 'Specify an account that has administrator privileges on the Central Administration computer.' and 'Specify the management service that is going to handle this farm.' At the bottom, there are buttons for Help, < Back, Next >, Finish, and Cancel.

To specify the SharePoint server account

1. In the Farm Connection page of the Configuration wizard, give your farm a name.
2. Type the name and password of the account that Metalogix Backup for SharePoint should use to connect to the Management Service for the farm in the **User Name** and **Password** fields.
3. Select the Management Service that will handle the farm that will be added.

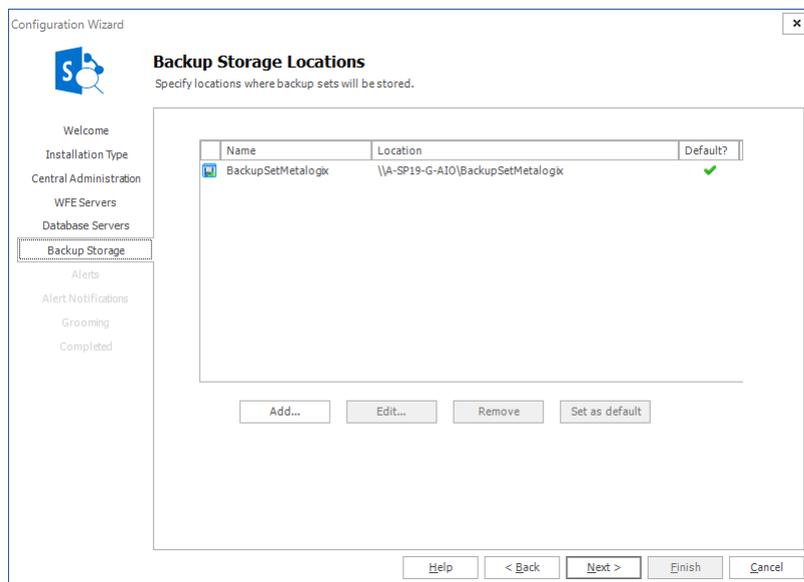
i | **TIP:** If this is the first time that a farm will be added, this section is grayed out.

Click **Next**.

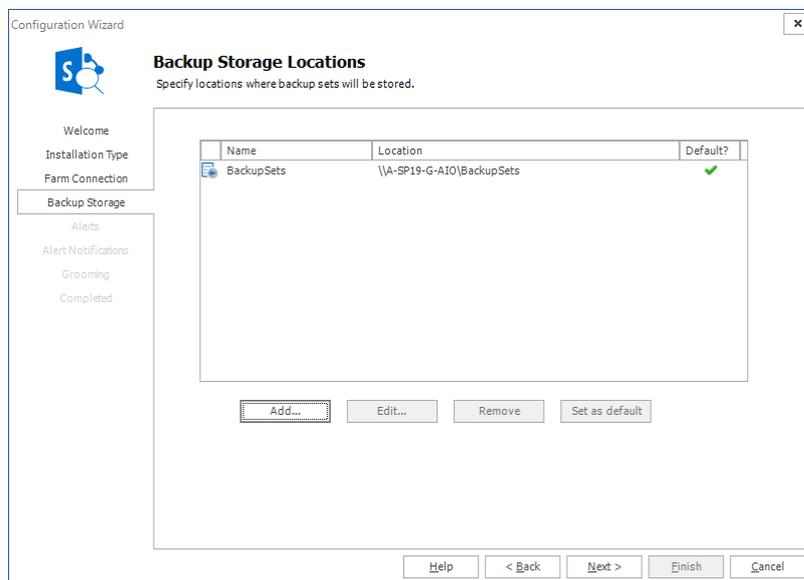
Specifying Backup Storage Locations

The Backup Storage Locations window is used to configure where farm backup sets will be stored.

Backup Storage Locations window for Installation Type = **Complete**



Backup Storage Locations window for Installation Type = **Granular**



To add a new Backup Location

1. Select the **Add** button to open the Add Backup Set Location dialog window.
2. Enter a name for the backup set location in the name field.
3. Select the backup set location type from the drop-down menu below. 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.

i **TIP:** If you remove a backup location that Metalogix Backup for SharePoint uses to store data in TSM, removing the location removes references to the data in Metalogix Backup for SharePoint. In addition, Metalogix Backup for SharePoint 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.

4. Provide the connection details for the chosen location type as required.

Example 1: Settings for Backup Set Location type = Network Location (UNC Path)

The screenshot shows the 'Add Backup Set Location' dialog box. The title bar reads 'Add Backup Set Location'. Inside the dialog, there is a text input field for the name, containing 'BackupSets'. Below it is a dropdown menu for the location type, set to 'Network Location (UNC Path)'. Underneath is a section for UNC paths with a text input field containing '\\A-SP19-G-AIO\BackupSets'. At the bottom, there is a checked checkbox labeled 'Set as the default backup set location'. 'Save' and 'Cancel' buttons are at the bottom right.

Example 2: Settings for Backup Set Location type = Tivoli Storage Manager (TSM)

The screenshot shows the 'Add Backup Set Location' dialog box. The title bar reads 'Add Backup Set Location'. Inside the dialog, there is a text input field for the name, containing 'tsm'. Below it is a dropdown menu for the location type, set to 'Tivoli Storage Manager (TSM)'. Underneath is a section for TSM with three text input fields: 'Enter the name of the TSM target client node:' containing 'SPBackup', 'Enter the name of the administrator of the TSM target client node:' containing 'tsmAdmin', and 'Enter the password of the administrator of the TSM target client node:' containing '*****'. Below these fields is a 'Note' section with an information icon and text: 'The TSM target client node is a virtual client node that will be used by all backup services in the farm. Ensure that the specified client node is registered in your TSM environment.' At the bottom, there is a checked checkbox labeled 'Set as the default backup set location'. 'Save' and 'Cancel' buttons are at the bottom right.

- Choose whether or not to set this location as the default for all backups by selecting the check box.
- Select **Save**.

To Edit an Existing Backup Location

To edit an existing backup location, highlight it from the locations list and select **Edit**. Then modify the configuration as required and select **Save**.

To Remove a Backup Location

To remove a backup location, select it from the locations list and click **Remove**. Then confirm your choice by selecting **Yes**.

To Change a Default Backup Set Location

To change the default backup set location, select the location from the locations list and click **Set as default**. A green check mark in the **Default?** column will indicate that the new backup location is set as default.

Configuring the Alert settings

Metalogix Backup for SharePoint generates an alert when a specified condition occurs. When Metalogix Backup for SharePoint 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 window in the Configuration wizard to choose the conditions that trigger an alert.

Alerts window for Installation Type = Complete

The screenshot shows the 'Alerts' window in the Configuration Wizard for a 'Complete' installation. The left sidebar lists the wizard steps: Welcome, Installation Type, Central Administration, WFE Servers, Database Servers, Backup Storage, Alerts (selected), Alert Notifications, Grooming, and Completed. The main area is titled 'Alerts' and contains the following sections:

- Alerts**: Select which alerts you would like generated:
- Operation Status Alerts**:
 - Backup/Mount Operations**:
 - Failed Successful
 - Warning Canceled
 - Restore Operations**:
 - Failed Successful
 - Warning Canceled
 - Granular Restore Operations**:
 - Failed Successful
 - Warning Canceled
- General Alerts**:
 - Warning alert when disk free space drops below 100 GB.
 - Error alert when disk free space drops below 10 GB.

At the bottom, there are buttons for Help, < Back, Next > (highlighted), Finish, and Cancel.

Alerts window for Installation Type = Granular

The screenshot shows the 'Alerts' window in the Configuration Wizard for a 'Granular' installation. The left sidebar lists the wizard steps: Welcome, Installation Type, Farm Connection, Backup Storage, Alerts (selected), Alert Notifications, Grooming, and Completed. The main area is titled 'Alerts' and contains the following sections:

- Alerts**: Select which alerts you would like generated:
- Operation Status Alerts**:
 - Backup/Mount Operations**:
 - Failed Successful
 - Warning Canceled
 - Restore Operations**:
 - Failed Successful
 - Warning Canceled
 - Granular Restore Operations**:
 - Failed Successful
 - Warning Canceled
- General Alerts**:
 - Warning alert when disk free space drops below 100 GB.
 - Error alert when disk free space drops below 10 GB.

At the bottom, there are buttons for Help, < Back, Next > (highlighted), Finish, and Cancel.

When you have configured the alerts, you can click **Next** to continue in the wizard.

Configuring the Alert Notification settings

When Metalogix Backup for SharePoint 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.

Alerts window for Installation Type = Complete

The screenshot shows the 'Alert Notifications' window in the Configuration Wizard. The left sidebar indicates the installation type is 'Complete'. The main content area is titled 'Alert Notifications' and includes the following sections:

- Alert Notifications:** Three checked options: 'Write alerts to the Application event log on the Management Service computer.', 'Send alerts as email.', and 'Enable Windows notifications.'
- Email Information:** Fields for 'Sender Name' (spsadmin@doma.com), 'Reply-to Address' (spsadmin@doma.com), and 'Recipient(s)' (spsadmin@doma.com). A 'Message Footer' dropdown is set to 'Information about MB45P'.
- Outgoing Mail Server Information:** Fields for 'SMTP Server Address' (10.18.37.134) and 'SMTP Server Port' (25). There is an unchecked checkbox for 'Use an SSL encrypted connection' and another unchecked checkbox for 'SMTP Server requires authentication' with 'User name' and 'Password' fields below it.

Buttons at the bottom include 'Test Email Settings', 'Help', '< Back', 'Next >', 'Finish', and 'Cancel'.

Alert Notifications window for Installation Type = Granular

The screenshot shows the 'Alert Notifications' window in the Configuration Wizard. The left sidebar indicates the installation type is 'Granular'. The main content area is titled 'Alert Notifications' and includes the following sections:

- Alert Notifications:** Three checked options: 'Write alerts to the Application event log on the Management Service computer.', 'Send alerts as email.', and 'Enable Windows notifications.'
- Email Information:** Fields for 'Sender Name' (spsadmin@doma.com), 'Reply-to Address' (spsadmin@doma.com), and 'Recipient(s)' (spsadmin@doma.com). A 'Message Footer' dropdown is set to 'Information about MB45P'.
- Outgoing Mail Server Information:** Fields for 'SMTP Server Address' (10.18.37.134) and 'SMTP Server Port' (25). There is an unchecked checkbox for 'Use an SSL encrypted connection' and another unchecked checkbox for 'SMTP Server requires authentication' with 'User name' and 'Password' fields below it.

Buttons at the bottom include 'Test Email Settings', 'Help', '< Back', 'Next >', 'Finish', and 'Cancel'.

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

Configuring the Grooming settings

If you choose, Metalogix Backup for SharePoint can groom older alerts and backup sets automatically to conserve storage space. When it grooms data, Metalogix Backup for SharePoint 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.

Grooming window for Installation Type = **Complete**

The screenshot shows the 'Grooming' window in the Configuration Wizard. The window title is 'Configuration Wizard' and the subtitle is 'Grooming'. The main text reads 'Configure backup set and alert grooming settings.' On the left, a navigation pane lists various steps: Welcome, Installation Type, Central Administration, WFE Servers, Database Servers, Backup Storage, Alerts, Alert Notifications, Grooming (highlighted), and Completed. The main area is divided into two sections: 'Backup Set Grooming' and 'Alert Grooming'. Under 'Backup Set Grooming', there are three radio buttons: 'Delete backup sets based on count: Retain the last 7 backup set(s)', 'Delete backup sets based on age: Retain the last 90 days of backup set(s)', and 'Check for expired backup sets every day at 05:00 AM'. The third option is checked. Below this is the text 'local time on the Management Service computer' and a checkbox 'Retain last 10 log files'. Under 'Alert Grooming', there are two radio buttons: 'Do not groom alerts' and 'Groom alerts older than 30 days'. The second option is selected. At the bottom, there are buttons for 'Help', '< Back', 'Next >', 'Finish', and 'Cancel'.

Grooming window for Installation Type = **Granular**

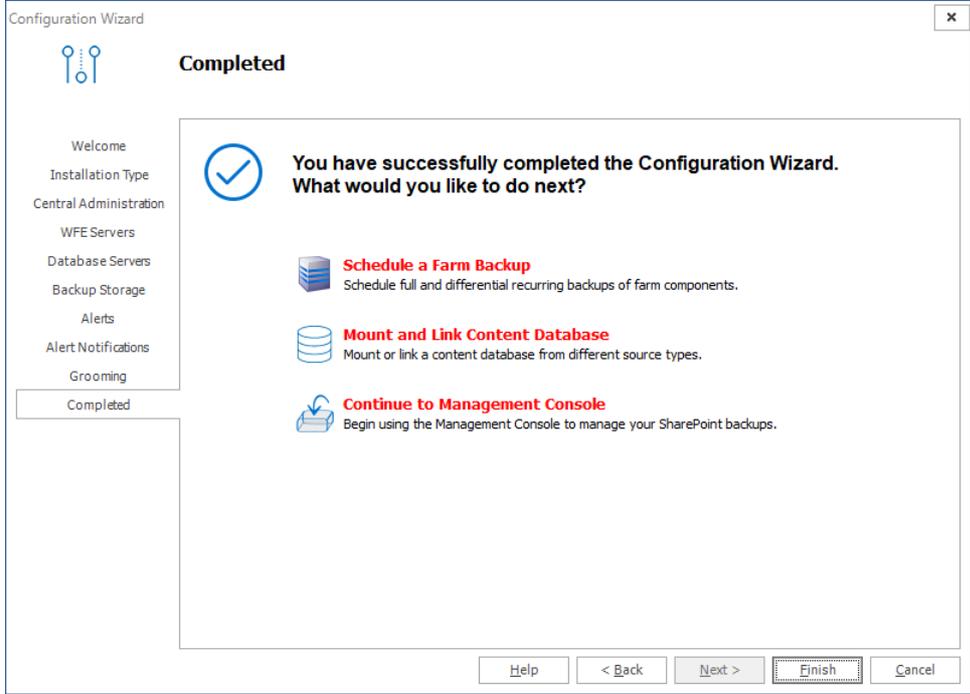
The screenshot shows the 'Grooming' window in the Configuration Wizard for the 'Granular' installation type. The layout is identical to the 'Complete' installation type window. The navigation pane on the left lists: Welcome, Installation Type, Farm Connection, Backup Storage, Alerts, Alert Notifications, Grooming (highlighted), and Completed. The 'Backup Set Grooming' section has the same three radio buttons, with 'Check for expired backup sets every day at 05:00 AM' selected. The 'Alert Grooming' section has the same two radio buttons, with 'Groom alerts older than 30 days' selected. The 'Next >' button is highlighted.

After you set the options, you can click **Next** to continue.

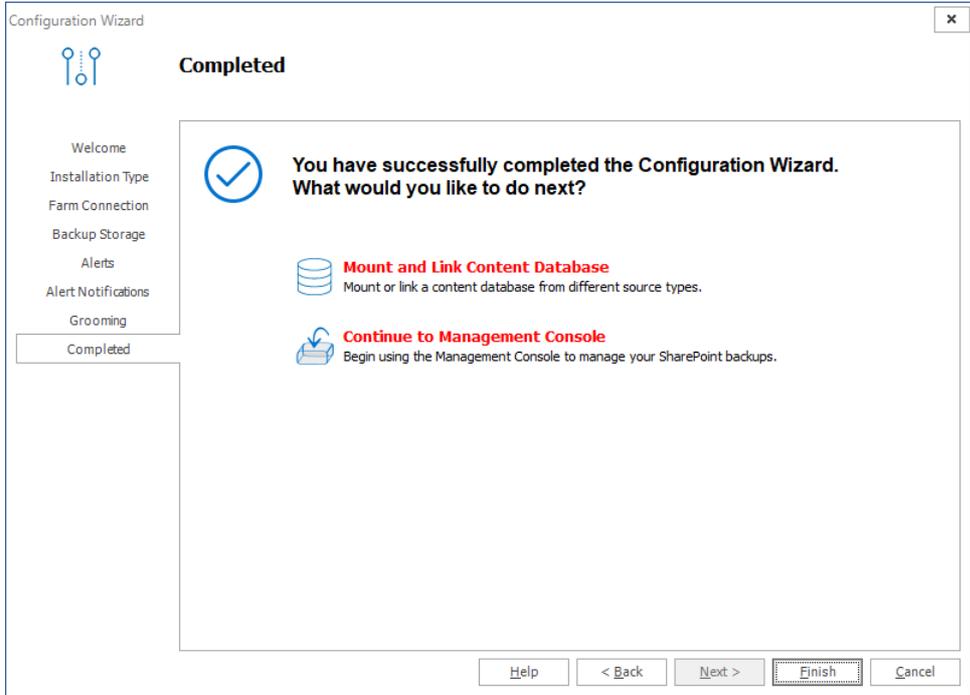
Completing the Configuration Wizard

The Completed tab displays the result of your installation choice.

Grooming window for Installation Type = Complete

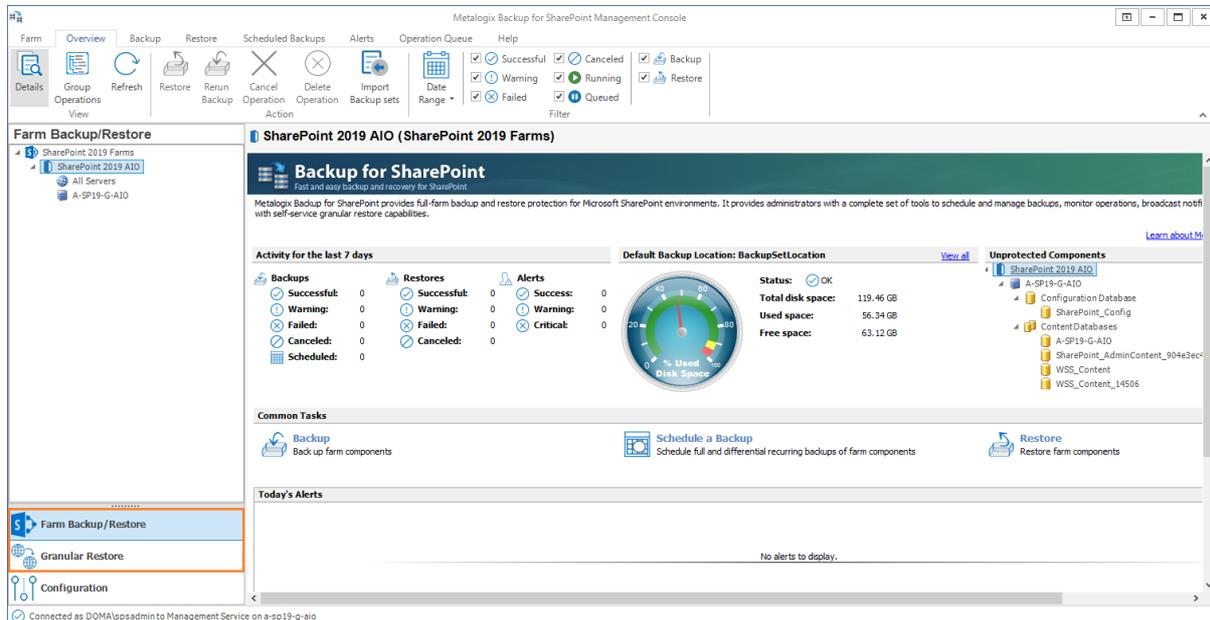


Grooming window for Installation Type = Granular

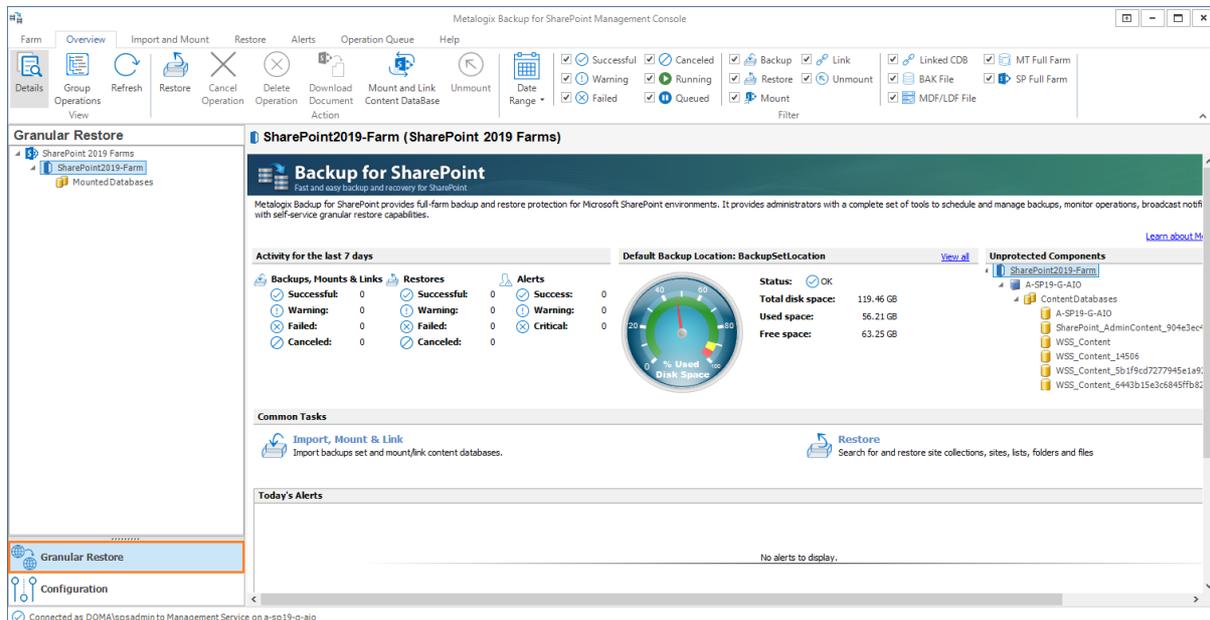


Click **Finish** to complete setting up your farm.

If you successfully added a farm with the **Complete** option then the **Backup/Restore** and the **Granular** options in the Metalogix Backup for SharePoint Management Console workspace selector are enabled.



If you successfully added a farm with the **Granular** option, only the Granular restore operations are enabled.



Deploying the Self-Service Recovery solution

The user must have adequate SharePoint permissions to access the library items. In addition, the user must have had adequate SharePoint permissions to access the item when it was backed-up.

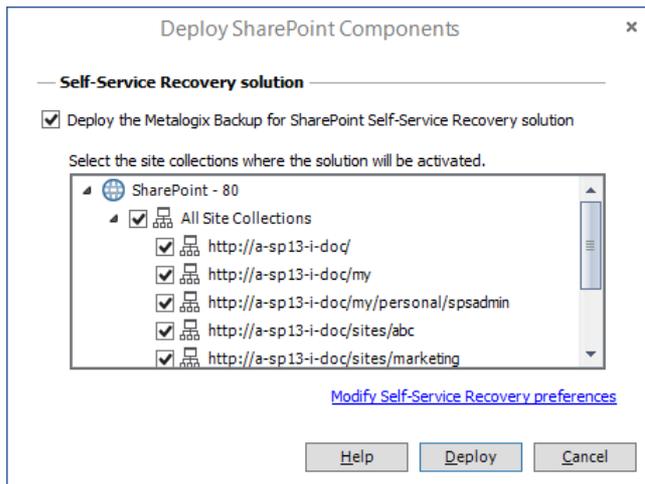
When you deploy the Self-Service Recovery feature, Metalogix Backup for SharePoint does the following automatically:

- Copies the Self-Service Recovery SharePoint Solution package (.WSP file) to the SharePoint Farm Solution store.
- Deploys the solution to the Web application that is the parent of any site collections that you specify.
- Activates the deployed solution as a SharePoint feature on the site collections.

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

Steps to deploy the Self-Service Recovery solution

1. Open the Management Console.
2. **OPTION 1**
 - a. From the Management Console workspace selector click either **Farm backup/Restore** or **Granular Restore**.
 - b. From the **Farms** tab, click **Deploy SSR**. The **Deploy SharePoint Components** dialog appears.
- OPTION 2**
 - a. From the Management Console workspace selector click **Configuration**.
 - b. From the **Configuration** tab, click **Deploy SSR**. The **Deploy SharePoint Components** dialog appears.
3. From the list of site collections, select the site collection where the solution will be activated.



i **NOTE:** To provide granular control, the Self-Service Recovery solution is installed as a common feature for the entire SharePoint farm. You can manually activate or deactivate the solution for each site collection.

4. Verify that the **Deploy the Metalogix Backup for SharePoint Self-Service Recover Solution** check box is selected.
5. Click **Deploy**. Otherwise click **Cancel** to exit the deployment.
6. If the deployment is successful, a confirmation dialog appears indicating the success of the deployment.

Configuring the Self-Service Recovery Settings

Use the Metalogix Backup for SharePoint 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 Backup for SharePoint deployment. If that Metalogix Backup for SharePoint 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:

- DNS name
- Fully-qualified name
- NetBIOS 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:

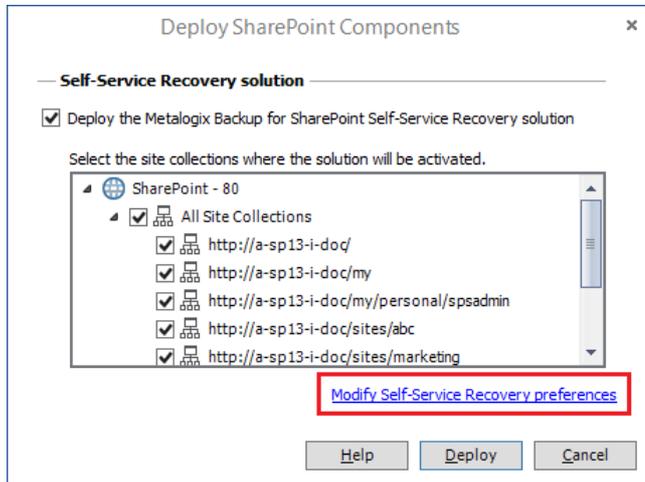
- Undefined
- Exception
- Critical
- Warning
- Informational

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

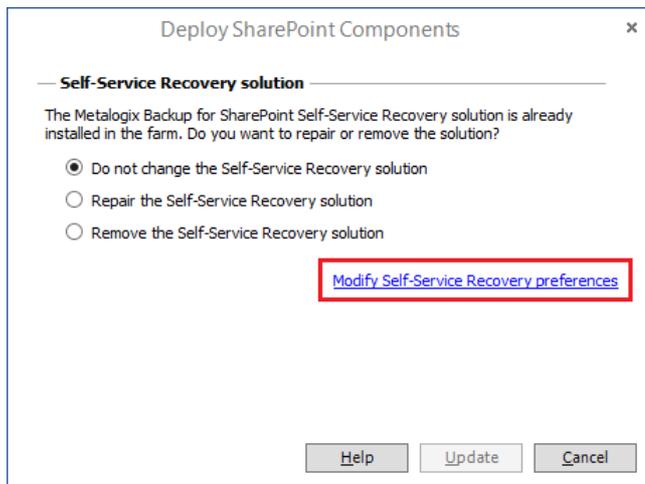
To configure the Self-Service Recovery settings

1. Open the Management Console.
 2. **OPTION 1**
 - a. From the Management Console workspace selector click either **Farm backup/Restore** or **Granular Restore**.
 - b. From the **Farms** tab, click **Deploy SSR**.
- OPTION 2**
- a. From the Management Console workspace selector click **Configuration**.

- b. From the **Configuration** tab, click **Deploy SSR**. The **Deploy SharePoint Components** dialog appears..
3. One of two **Deploy SharePoint Components** dialogs appear.
 - a. If the Self-Service Recovery solution is being deployed then the **Deploy SharePoint Components** dialog for a deployment appears.



- b. If the Self-Service Recovery solution has already been deployed then the **Deploy SharePoint Components** dialog for an update appears.



4. Click the **Modify Self-Service Recovery preferences** link.

5. In the **Self-Service Recovery Settings** window, configure the settings, then click **Save**.

Self-Service Recovery Settings x

Settings for Metalogix SharePoint Backup Self-Service Recovery

Management Service

Specify the computer name where the Metalogix SharePoint Backup Management Service is installed (Example: MYSP-SRV01):

a-sp10-b-s08r2

Management service port:

7484

Browse Limits

Limit the number of items returned when browsing:

1000

Search Limits

Limit the number of items returned when searching:

1000

Logging

Specify the Self-Service Recovery ULS logging level:

Warning

Help Save Cancel

6. In the Deploy SharePoint Components window, click **Cancel**.

About Us

We are more than just a name

We are on a quest to make your information technology work harder for you. That is why we build community-driven software solutions that help you spend less time on IT administration and more time on business innovation. We help you modernize your data center, get you to the cloud quicker and provide the expertise, security and accessibility you need to grow your data-driven business. Combined with Quest's invitation to the global community to be a part of its innovation, and our firm commitment to ensuring customer satisfaction, we continue to deliver solutions that have a real impact on our customers today and leave a legacy we are proud of. We are challenging the status quo by transforming into a new software company. And as your partner, we work tirelessly to make sure your information technology is designed for you and by you. This is our mission, and we are in this together. Welcome to a new Quest. You are invited to Join the Innovation™.

Our brand, our vision. Together.

Our logo reflects our story: innovation, community and support. An important part of this story begins with the letter Q. It is a perfect circle, representing our commitment to technological precision and strength. The space in the Q itself symbolizes our need to add the missing piece — you — to the community, to the new Quest.

Contacting Quest

For sales or other inquiries, visit www.quest.com/contact.

Technical Support Resources

Technical support is available to Quest customers with a valid maintenance contract and customers who have trial versions. You can access the Quest Support Portal at <https://support.quest.com>

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

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