



Quest[®] NetVault[®] Backup Plug-in *for Microsoft Office 365 12.1*

User's Guide



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Legend

- **WARNING:** A WARNING icon indicates a potential for property damage, personal injury, or death.
- ⚠ **CAUTION:** A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.
- i **IMPORTANT NOTE, NOTE, TIP, MOBILE, or VIDEO:** An information icon indicates supporting information.

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Introducing NetVault Backup Plug-in for Microsoft Office 365

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NetVault Backup Plug-in for Microsoft Office 365: at a glance

Quest® NetVault® Backup Plug-in for Microsoft Office 365 (Plug-in for Microsoft Office 365) increases confidence in the recoverability of data that you produce using Microsoft Office 365 (Office 365). Office 365, which provides software as a service (SaaS), is a cloud-based service. The plug-in lets you create flexible backup policies that can account for multiple recovery scenarios. Through a web-based user interface (WebUI) and automated workflow process, the plug-in offers a centralized way to set up, configure, and define backup and restore policies for Office 365. Through integration with a range of backup devices, your data is protected and stored offsite to meet your disaster-recovery and business-continuity goals.

The plug-in enables Full and Incremental Backups and Restores of your Outlook account in Office 365. Using the plug-in ensures that you have backups stored in an accessible location as part of your regular backup process. To manage the size of backups and accommodate network bandwidth, your backups can include or exclude the various items as part of the backup process.

Key benefits

- **Increases confidence and reduces risk while subscribing to Office 365:** The plug-in lets you create backup policies that are flexible enough to account for various recovery scenarios.

The plug-in's backup features include:

- Protection for individual, shared, and resource mailboxes
- Full and Incremental Backups while data is online and accessible

By relying on the plug-in to implement backup policies, you can focus on more critical tasks without risking your ability to recover what is needed if a failure occurs. In addition, the IT manager's confidence is increased by knowing that email is protected, no matter what.

- **Speeds up restores to reduce downtime:** With the plug-in, you select what must be restored and the backup set to restore from, and the plug-in automatically performs the restore.

Additional restore features include:

- Full and Incremental Restores
- Restores of individual, shared, and resource mailboxes
- **Ensure business continuity:** With offsite backups being an important part of the data-protection for business-critical applications, the plug-in takes advantage of NetVault Backup's integration with a range of backup devices. NetVault Backup lets you select which backup device to store the backup on.

To address the lack of native backup and flexible recovery abilities for user data, such as the 30-limitation of deleted email, you can use the plug-in to implement a more robust backup and recovery implementation. The plug-in also ensures that your data is protected if a user's mailbox becomes corrupted.

- **Eliminate backup windows and reduce storage:** The plug-in gives you the confidence that your email environment is protected and stored offsite for disaster-recovery purposes. At the same time, it frees administrators from having to be available 24x7 because less-experienced personnel can initiate restores, thus reducing downtime and improving business continuity.

Feature summary

- Protection for individual, shared, and resource mailboxes
- Full and Incremental Backups while data is online and accessible
- Full and Incremental Restores
- Restores of individual, shared, and resource mailboxes
- Point-and-click WebUI
- Relocation of mailbox during restore

Target audience

This guide is intended for users who are responsible for the backup and recovery of Office 365. Familiarity with Office 365 administration is assumed. Advanced knowledge of Office 365 is useful for defining an efficient backup-and-recovery strategy.

Recommended additional reading

Quest recommends that you have the following **Office 365 documentation** available for reference when setting up and using this plug-in: <https://docs.microsoft.com/en-us/Office365/> and [https://technet.microsoft.com/en-us/library/dn127064\(v=office.14\).aspx](https://technet.microsoft.com/en-us/library/dn127064(v=office.14).aspx)

The following documentation is also available:

- *Quest NetVault Backup Installation Guide:* This guide provides details on installing the NetVault Backup Server and Client software.
- *Quest NetVault Backup Administrator's Guide:* This guide explains how to use NetVault Backup and describes the functionality common to all plug-ins.
- *Quest NetVault Backup CLI Reference Guide:* This guide provides a description of the command-line utilities.

You can download these guides from <https://support.quest.com/technical-documents>.

Installing and removing the plug-in

- [Installation prerequisites](#)
- [Installing or upgrading the plug-in](#)
- [Removing the plug-in](#)

Installation prerequisites

You can install the plug-in on any pure 64-bit Windows Server-based NetVault Backup Server or Client that supports the Microsoft .NET Framework, version 4.5 or later.

- **Verify that Microsoft .NET Framework is installed:** The server that you use must support version 4.5 or later of the .NET Framework.
- **Install NetVault Backup Server or Client software:** At a minimum, the NetVault Backup Client software must be installed on the server. For instructions on installing the NetVault Backup Server or Client software, see the *Quest NetVault Backup Installation Guide*.
- **Ensure that the server or client has access to a high level of internet bandwidth:** Because the data that is backed up resides on a cloud-based server and is downloaded to local storage media, Quest recommends that you install the plug-in on a client or server that has high internet bandwidth.

Installing or upgrading the plug-in

- 1 Access the **NetVault Configuration Wizard** or **Manage Clients** page.

i **NOTE:** If the selected clients are all the same type, you can use the configuration wizard to install the plug-in on multiple clients at the same time. From the **Manage Clients** page, you can only select one client for plug-in installation.

- To access the **NetVault Configuration Wizard** page:
 - a In the Navigation pane, click **Guided Configuration**.
 - b On the **NetVault Configuration Wizard** page, click **Install Plugins**.
 - c On the next page, select the applicable clients.
 - To access the **Manage Clients** page:
 - a In the Navigation pane, click **Manage Clients**.
 - b On the **Manage Clients** page, select the applicable machine Server, and click **Manage**.
 - c On the **View Client** page, click the **Install Plugin** button (🔍).
- 2 Click **Choose Plug-in File**, navigate to the location of the “.npk” installation file for the plug-in, for example, on the installation CD or the directory to which the file was downloaded from the website.

Based on the OS in use, the path for this software may vary on the installation CD.

- 3 Select the file entitled “**O365-x-x-x-x-WindowsPure64.npk**,” where **xxxx** represents the version number, and click **Open**.
- 4 To begin installation, click **Install Plugin**.
After the plug-in is successfully installed, a message is displayed.

Removing the plug-in

- 1 In the Navigation pane, click **Manage Clients**.
- 2 On the **Manage Clients** page, select the applicable client, and click **Manage**.
- 3 In the **Installed Software** table on the **View Client** page, select **Plug-in for Microsoft Office 365**, and click the **Remove Plugin** button (🗑️).
- 4 In the **Confirm** dialog box, click **Remove**.

Configuring the plug-in

- Using the Office 365 admin portal to obtain configuration details
- Entering the configuration details in the plug-in

Using the Office 365 admin portal to obtain configuration details

Before initiating a backup, you must obtain configuration information from your Office 365 admin portal, and enter the information in the configuration section for the plug-in.

- 1 Access your Office 365 admin portal at <https://portal.microsoftonline.com/>, and open the **Admin** app.
- 2 In the navigation pane on the left, click **Admin centers**, and then select **Azure Active Directory** from the list.
- 3 In the **Azure Active Directory admin center**, under **All services**, click **Azure Active Directory**.
- 4 In the **MANAGE** section, click **App registrations**, and then click **New application registration**.
- 5 Complete the following fields:
 - **Name:** Enter a name for the NetVault Backup plug-in, such as **PluginOffice365**.
 - **Application type:** From the list, select **Web app/API**.
 - **Sign-on URL:** Enter the URL that you use for interacting with NetVault Backup, such as `https://<machineName>:8443`.
- 6 Click **Create**, and note the **Application ID** listed on the page that appears.

Quest strongly recommends that you record this information, for example by copying it to a text file and saving that file.
- 7 Click the **Settings** icon, and then click **Required permissions** in the **API ACCESS** section.
- 8 On the **Required permissions** tab, click **Add**.
- 9 Choose one of the following options:
 - **Select an API:** To use this method, select **Microsoft Graph**, and then click **Select**.
 - **Select permissions:** To use this option, complete the following steps:
 - a Select the **APPLICATION PERMISSIONS** and **DELEGATION PERMISSIONS** check boxes to select all listed options, and then click **Select**.

You must select all options at this point.
 - i | IMPORTANT:** If you use the Select permissions option, you cannot change the settings by clearing the permissions-related check boxes at a later time.
 - b On the **Add API access** tab, click **Done**.

The program grants permission to the items listed in the permissions sections.

- c To assign permissions to the Plug-in *for Microsoft Office 365* after the plug-in is configured, click **Grant permissions** on the **Required permissions** tab, and click **Yes** when the confirmation message appears.
- 10 On the **Settings** tab, in the **API ACCESS** section, click **Keys** to create passwords for the plug-in to use.
- 11 Enter a description, select an expiration date, click **Save**, and note the information in the **VALUE** box.

Quest strongly recommends that you record this information, for example by copying it to the same text file that you created and saved earlier.
- 12 Click **Create**, and note the **Application ID** listed on the page that appears.

Quest recommends that you record this information, for example by copying it to a text file and saving that file.

i | **IMPORTANT:** You cannot retrieve this key at a later time. If you do not record it for reference when you configure the plug-in, you have to generate a new key.
- 13 To identify the domain name used for Office 365, click **Azure Active Directory** again in the navigation pane on the left.
- 14 Click **Overview**, and note the domain name.

Quest recommends that you record this information, for example by copying it to a text file and saving that file.

Entering the configuration details in the plug-in

After you have identified application ID, password, and domain name, you must enter the information in the configuration section for the plug-in.

- 1 In the Navigation Pane, click **Create Backup Job**, and click **Create New** next to the **Selections** list.
- 2 In the selection tree, open the applicable client node.
- 3 Click **Plug-in for Microsoft Office 365**, and select **Configure** from the context menu.
- 4 On the **Office 365 Credentials** tab, complete the following fields using the information that you recorded during the previous process, [Using the Office 365 admin portal to obtain configuration details](#).
 - **Application Domain**
 - **Application ID**
 - **Application Password**
- 5 To save the settings, click **OK**.

With the account properly configured, you can click the **Plug-in for Microsoft Office 365** node to display the available mailboxes.

Backing up data

- [Defining a backup-and-recovery strategy](#)
- [Adding patterns to use for exclusion and inclusion of mailbox folders](#)
- [Performing backups](#)

Defining a backup-and-recovery strategy

The purpose of creating Office 365 backups is to recover a mailbox that is damaged from media failure or data corruption. Reliable use of backup for recovery requires a strategy that maximizes data availability and minimizes data loss, while accounting for defined business requirements.

A strategy is divided into two pieces: a backup piece and a restore piece.

- The backup piece defines the type and frequency of backups that are required to meet the goals for availability of the database and for minimizing data loss.
- The restore piece defines who is responsible for performing restores, and how restores should be performed to recover from the particular type of damage or failure.

Your backup plan should define at what intervals the backups are performed, how backups are stored, how long backups are retained, and how the backup media are reused.

The plug-in provides the following types of backup:

- **Full Backups only:** You can choose to perform only Full Backups if the backup size is small, backup window is not an issue, or storage media is not a constraint. In such scenarios, you can schedule Full Backups every night or every N hours depending on the frequency of updates.

If a failure occurs, the plug-in is only required to restore a single saveset.

- **Full and Incremental Backups:** For quicker backups and minimum use of storage media, you can include Full and Incremental Backups in your strategy. For example, you can schedule Full Backups every Sunday and Incremental Backups every day or every N hours depending on the frequency of updates.

If a failure occurs, the plug-in is required to restore data from the recent Full Backup and each Incremental Backup in the backup sequence. The restore might take longer if several Incremental savesets have to be restored. For example, if the failure occurs on Saturday, the plug-in is required to restore the Full Backup taken on Sunday and Incremental Backups taken from Monday through Friday.

Adding patterns to use for exclusion and inclusion of mailbox folders

In addition to selecting mailboxes from the backup selection tree, you can create and store patterns of mailbox folders that you want to include and exclude for all selected user mailboxes that you back up. When you specify patterns to exclude or include, or both, the plug-in stores them with a Backup Selection Set. When you submit a backup job, you can select the set with the stored patterns. The plug-in then populates the backup list with mailboxes whose folder names meet the specified inclusion and exclusion patterns. There is no limit to the number of patterns that you can specify. Be aware that the plug-in gives priority to exclusions.

- 1 In the Navigation Pane, click **Create Backup Job**, and click **Create New** next to the **Selections** list.
- 2 In the selection tree, open the applicable client node.
- 3 Click **Plug-in for Microsoft Office 365**, and select **View Inclusion/Exclusion** from the context menu.
The plug-in adds two subnodes, **Mail Folder Exclusions** and **Mail Folder Inclusions**, to the **Office 365** node.
- 4 To specify an exclusion pattern, which takes priority over inclusion patterns, complete the following steps:
 - a Click **Mail Folder Exclusions**, and then select **Exclude Mail Folder Pattern**.
 - b In the **Enter exclude pattern** dialog box, type the pattern to exclude, and click **OK**.
Use a Portable Operating System Interface (POSIX) regular expression (regex) to create an exclusion pattern. For example, if you want to exclude the **Junk E-Mail** folder, type **Junk***.
- 5 To specify an inclusion pattern, complete the following steps:
 - a Click **Mail Folder Inclusions**, and then select **Include Mail Folder Pattern**.
 - b In the **Enter include pattern** dialog box, type the pattern to include, and click **OK**.
Use a POSIX regex to create an inclusion pattern. For example, if you want to include all **FolderXXX** folders, type **Folder???**.

The plug-in lists an informational node with the new patterns below the corresponding subnodes. When you set up a backup job, you can select or clear the applicable patterns.
- 6 When you are finished, click **Save**, enter a name in the **Create New Set** dialog box, and click **Save**.
The name can contain alphanumeric and nonalphanumeric characters, but it cannot contain non-Latin characters. On Windows, there is no length restriction. However, a maximum of 40 characters is recommended on all platforms.

Performing backups

A backup using the plug-in includes the steps outlined in the following topics:

- [Selecting data for a backup](#)
- [Setting backup options](#)
- [Finalizing and submitting the backup job](#)

Selecting data for a backup

You must use sets—Backup Selection Set, Backup Options Set, Schedule Set, Target Set, and Advanced Options Set—to create a backup job.

Backup Selection Sets are essential for Incremental Backups. Create the Backup Selection Set during a Full Backup, and use it for Full and Incremental Backups. The backup job reports an error if you do not use a Selection Set for the Incremental Backup. For more information, see the *Quest NetVault Backup Administrator's Guide*.

i | TIP: To use an existing set, click **Create Backup Job**, and select the set from the **Selections** list.

- 1 In the Navigation pane, click **Create Backup Job**.

You can also start the wizard from the Guided Configuration link. In the Navigation pane, click **Guided Configuration**. On the **NetVault Configuration Wizard** page, click **Create backup jobs**.

- 2 In **Job Name**, specify a name for the job.

Assign a descriptive name that lets you easily identify the job when monitoring its progress or restoring data. The job name can contain alphanumeric and nonalphanumeric characters, but it cannot contain non-Latin characters. On Windows, there is no length restriction; however, a maximum of 40 characters is recommended.

- 3 Next to the **Selections** list, click **Create New**.

- 4 In the list of plug-ins, open **Plug-in for Microsoft Office 365**, locate the **Outlook** node, and do one of the following:

- To include all mailboxes in the selection set, select the **Outlook** node.
- To select specific mailboxes, expand the **Outlook** node, and select the applicable mailboxes.

- 5 Click **Save**, enter a name in the **Create New Set** dialog box, and click **Save**.

The name can contain alphanumeric and nonalphanumeric characters, but it cannot contain non-Latin characters. On Windows, there is no length restriction. However, a maximum of 40 characters is recommended on all platforms.

Setting backup options

The next step involves creating the Backup Options Set or selecting an existing one.

i | TIP: To use an existing set, in the **Plugin Options** list, select the set that you want to use.

- 1 Next to the **Plugin Options** list, click **Create New**.

- 2 In the **Backup Type** section, select the applicable option.

- **Full Backup:** A Full Backup performs a complete backup of the selected mailbox, including its folders, messages, mailbox settings, and rules.
- **Incremental Backup:** An Incremental Backup backs up all data changed in the selected mailbox since the last occurrence of a Full or Incremental Backup.

For more information, see [Defining a backup-and-recovery strategy](#).

- 3 If you want to use parallel streams to increase the speed of backup jobs, select the **Enable multi-streaming** option, and then indicate the number of threads and streams.

If the number of mailboxes included in a selection set is less than the specified number of streams, the plug-in automatically adjusts the number of streams.

- 4 If you want to be able to pause a backup and have it resume from the point at which it was stopped, select the **Enable Restartable backup** option.

This option lets you manually interrupt a backup job; it does not restart a backup job that has failed.

- 5 If you want to exclude the attachments from messages, select the **Exclude attachments in backup** option.

By default, the plug-in includes attachments from backup jobs. Excluding attachments reduces the size of the backup and increases the speed at which it is processed.

- 6 To save the set, click **Save**.
- 7 In the **Create New Set** dialog box, specify a name for the set, and click **Save**.

The name can contain alphanumeric and nonalphanumeric characters, but it cannot contain non-Latin characters. On Windows, there is no length restriction; however, a maximum of 40 characters is recommended.

Finalizing and submitting the backup job

- 1 Use the **Schedule**, **Target Storage**, and **Advanced Options** lists to configure any additional required options.
- 2 Click **Save** or **Save & Submit**, whichever is applicable.

i | **TIP:** To run a job that you have already created and saved, select **Manage Job Definitions** on the Navigation pane, select the applicable job, and click **Run Now**.

You can monitor progress on the **Job Status** page and view the logs on the **View Logs** page. For more information, see the *Quest NetVault Backup Administrator's Guide*.

Restoring data

- [Selecting data for a restore](#)
- [Setting restore options](#)
- [Finalizing and submitting the restore job](#)
- [Relocating a mailbox during the restore process](#)

Selecting data for a restore

- 1 On the Navigation pane, click **Create Restore Job**.
- 2 On the **Create Restore Job—Choose Saveset** page, select **Plug-in for Microsoft Office 365** from the **Plugin Type** list.
- 3 To filter the items displayed in the saveset table further, use the **Client**, **Date**, and **Job ID** lists.
The table displays the saveset name (job title and saveset ID), creation date and time, and size. By default, the list is sorted by creation date.
- 4 In the saveset table, select the applicable item.
When you select a saveset, the following details are displayed in the **Saveset Information** area: Job ID, job title, server name, client name, plug-in name, saveset date and time, retirement setting, Incremental Backup or not, Archive or not, saveset size, and snapshot-based backup or not.
- 5 Click **Next**.
- 6 On the **Create Selection Set** page, select the data that you want to restore.

i | **NOTE:** Although the plug-in supports multi-stream backup jobs, it does not support multi-streaming restore jobs.

Setting restore options

On the **Create Selection Set** page, click **Edit Plugin Options**, and configure the following parameters on the **Office 365 Restore Options** tab:

- **Restore mailbox to particular folder:** If you want to specify a specific location to restore the selected mailbox folder to, select this option and enter the name of the folder.
- **Restore mailbox settings:** To include the settings and rules associated with the selected mailboxes, select this option.
- **Include attachments in restore:** If attachments were included in the backup, select this option if you want to include the attachments in the restored version of the mailbox.
- **Exclude attachments in restore:** If attachments were included in the backup, select this option if you want to exclude the attachments from the restored version.

- **Restore attachments to User's OneDrive account:** If attachments were included in the backup, select this option if you want to include the attachments in the restored version and send them to the user's Microsoft OneDrive account.

i | IMPORTANT: To use this option, you must have a SharePoint license to perform a restore to a OneDrive account.

Finalizing and submitting the restore job

The final steps include setting additional options on the Schedule, Source Options, and Advanced Options pages, submitting the job, and monitoring the progress through the Job Status and View Logs pages. These pages and options are common to all NetVault Backup Plug-ins. For more information, see the *Quest NetVault Backup Administrator's Guide*.

- 1 To save the settings, click **Ok**, and then click **Next**.
- 2 In **Job Name**, specify a name for the job if you do not want to use the default setting.
Assign a descriptive name that lets you easily identify the job when monitoring its progress. The job name can contain alphanumeric and nonalphanumeric characters, but it cannot contain non-Latin characters. On Windows, there is no length restriction; however, a maximum of 40 characters is recommended.

- 3 In the **Target Client** list, select the machine on which you want to restore the data.

i | TIP: You can also click **Choose**, and then locate and select the applicable client in the **Choose the Target Client** dialog box.

- 4 Use the **Schedule**, **Source Options**, and **Advanced Options** lists to configure any additional required options.
- 5 Click **Save** or **Save & Submit**, whichever is applicable.

You can monitor progress on the **Job Status** page and view the logs on the **View Logs** page. For more information, see the *Quest NetVault Backup Administrator's Guide*.

Relocating a mailbox during the restore process

To complete the relocation process, perform the following steps.

- 1 After the prerequisites have been met, click **Create Restore Job**.
- 2 From the **Plugin Type** list, select **Plug-in for Microsoft Office 365**.
- 3 Select the applicable mailbox from the backup saveset, and click **Next**.
- 4 On the **Create Selection Set** page, click the mailbox that you want to rename, and select **Relocate** from the context menu.
- 5 In the **Rename/Relocate** dialog box, enter the new location for the mailbox in the **Relocate** box, and click **Ok**.
- 6 Continue with the restore procedure as explained in [Setting restore options](#) and [Finalizing and submitting the restore job](#).

The mailbox is restored with its new name to the original location as a subset of the original mailbox.

Troubleshooting

This topic describes some common errors and their solutions.

Table 1. Troubleshooting

Error message	Explanation
<ul style="list-style-type: none"> • Failed to add backup record • Failed to write index of backup to the database <p>These messages indicate that the selected data was backed up, but the job's index information was not properly added by NetVault Backup to its database. Without this index information, the data cannot be properly restored.</p>	<p>Method 1: Open the Manage Devices page, select the backup media, and click Scan. NetVault Backup stores index information for backup jobs in two locations: in the NetVault Database and on the media targeted by the backup. When you scan the backup media, the index information is added to the NetVault Database. To verify that the information was added, open the Manage Job Definitions page, and locate the specific job. If you can run the job now, the scan process has corrected the problem.</p> <p>Method 2: If the scan has failed, run the backup job again.</p>

We are more than just a name

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