Quest

Metalogix® Backup for SharePoint 6.12

User Guide

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Metalogix® Backup for SharePoint
Updated August 2023

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Metalogix® Backup for SharePoint
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Product Overview

Metalogix Backup for SharePoint is a powerful solution that automates your SharePoint backup protection and provides flexible SharePoint restore and recovery. Metalogix Backup for SharePoint features an intuitive Management Console and delivers a robust, efficient backup and restore solution that you can install in minutes.

Metalogix Backup for SharePoint provides comprehensive SharePoint backup and restore services through the following critical features:

- Automated backup of SharePoint 2013, 2016, 2019, and Subscription Edition farm components.
- Reduced time and size of backups using differentials to capture only those objects that changed since your last full backup.
- Powerful IntelliSearch™ for finding the backed-up content you need.
- Self-service SharePoint recovery through an intuitive Self-Service Recovery feature.
- Detailed restore capabilities and options for the specific objects you need.
- Comprehensive reporting and operation monitoring provided within the Management Console.
- Easy installation and use.

How does Metalogix Backup for SharePoint help me?

Microsoft SharePoint helps you to improve the efficiency of your organization through comprehensive content collaboration and management. A reliable and flexible backup and recovery solution is essential to protect your SharePoint content. Metalogix Backup for SharePoint provides the powerful solution that you need by helping you to back up your SharePoint content on a regular basis. You can back up frequently changing content more often to provide additional protection.

Finding and recovering lost content can be time consuming. Metalogix Backup for SharePoint solves these issues by providing a proactive solution that safely backs up your content and provides an intuitive Management Console to help you quickly locate and restore the backed-up content you need. The Self-Service Recovery feature provides the flexible restore solution you need to avoid delays and reduce your SharePoint administration costs. For SharePoint 2013, 2016, 2019 and Subscription Edition farms, Metalogix Backup for SharePoint lets you backup and restore the components that make up your farm.

Metalogix Backup for SharePoint incorporates proven SharePoint experience and knowledge in a comprehensive, automated, and effective solution. With Metalogix Backup for SharePoint, you can:

- Automate the SharePoint backup process to protect changing content.
- Reduce storage requirements for backed-up SharePoint objects.

- Quickly locate and recover backed-up SharePoint objects.
- Deliver self-service SharePoint content recovery to save time.
- Eliminate training needs with the intuitive Management Console, Self-Service Recovery feature, and wizards.
- Monitor and review backup and restore operations.

Using Metalogix Backup for SharePoint in your disaster recovery plans

Your plans for recovering from problems with your Microsoft SharePoint farm are a vital part of your SharePoint strategy. Metalogix Backup for SharePoint can be an important part of those plans. A disaster recovery plan is your expectation of and preparation for problems with your SharePoint deployment but is not as simple as backing up and restoring the servers that make up your SharePoint farm.

Disaster recovery is a business problem, not a technical one. Your disaster recovery plan must balance the business needs of your enterprise with the technical and financial costs required to implement the plan and answer the following questions:

- How long does it take?
- What can I afford to lose?
- What does it cost?
- How do I protect my SharePoint farms from disaster?

Backup and recovery is part of how you design and implement your disaster recovery plan. Backup and recovery are technical, process answers to a business question. These technical questions and their answers are important, but they are not the whole story. In fact, not all disaster recovery involves backup and restore. Some plans for disaster recovery can omit backup and restore capabilities entirely.

How are disaster recovery strategies designed, and how do they evolve over time?

Your SharePoint disaster recovery plan is a part of, and grows from, your larger business continuity plan. You create your business continuity plan based on a business impact analysis. The business impact analysis is in turn based on a risk analysis of your business operations.

You must prioritize your plans and the resources allotted to them based on the financial impact of executing the plan, and consider what happens if you do not implement the plan.

What disaster recovery-specific issues should I consider?

When you create your disaster recovery plan, there are some unique issues that you should consider, including the following:

Term	Definition	Comments
Recovery Point Objective (RPO)	The RPO is the point in time that is your target when you recover from a disaster. The RPO is measured in time before the present.	When you specify the RPO, answer the question, "How much data am I willing to lose?"
Recovery Time Objective (RTO)	The RTO is the goal a of time necessary to recover from a disaster. It is measured in time from the present.	When you specify the RTO, answer the question, "How long do I have to restore an agreed-upon level of functionality?
Disaster Recovery (DR) targets	The DR targets are the items in your SharePoint deployment that you protect from loss or failure.	Specify coarse or granular targets. You can mix levels of granularity, depending on the target. For example, you may need to protect an entire SharePoint farm in one deployment. In another, you may need to protect only a site collection, a Web application, a single site, or specified data. The DR plan must set priorities for the targets that it includes. Not all targets have equal importance to the farm or to users.

How does Metalogix Backup for SharePoint fit into a disaster recovery strategy?

Metalogix Backup for SharePoint helps you to execute your disaster recovery strategy. Before a disaster happens, you can use Metalogix Backup for SharePoint to back up the elements that make up your SharePoint farm. Depending on the version of SharePoint that you use, you can back up the farm components or the SharePoint objects themselves.

Metalogix Backup for SharePoint requires a functioning SharePoint farm for both backup operations and restore operations. As such, it is not suitable for all parts of your DR strategy. Metalogix Backup for SharePoint is not a high availability (HA) solution. It is also not intended for the portions of your DR plans that require low RTO or low RPO windows that measure in minutes rather than hours.

Which SharePoint farm components can you use Metalogix Backup for SharePoint to back up and restore?

Metalogix Backup for SharePoint can back up many of the components that make up your SharePoint farm. You can also restore these components when necessary. Metalogix Backup for SharePoint can back up and restore the following components, although not all of the following components can be restored in place:

- SharePoint configuration database
- SharePoint content databases
- Search components
- Search databases
- Service applications (with the exception of those listed below)
- .NET framework configuration
- Certificate store
- Internet Information Services (IIS) configuration
- IIS Metabase
- SharePoint registry entries
- SharePoint root
- SharePoint Web application roots

Metalogix Backup for SharePoint does not back up certain other components including the following Service Applications:

- Usage and Health data service application
- State Service application
- SP foundation subscription.

What factors affect Metalogix Backup for SharePoint performance?

The following factors can affect the performance of your Metalogix Backup for SharePoint deployment and thus can affect the RPO and RTO:

Backup location file performance

All content is backed-up to a UNC path or a Tivoli Storage Manager (TSM) virtual storage node that you specify when you create a backup job. Metalogix Backup for SharePoint performs extensive multi-stream, concurrent read and write activity. When you perform a farm backup, each farm member and SQL Server can initiate read/write activity separately. In a multi-server SharePoint farm, the performance of the backup location host can result in a significant bottleneck.

Network performance

As Metalogix Backup for SharePoint performs farm backups, it can transfer large amounts of data across your network to and from the backup location. A saturated network can slow Metalogix Backup for SharePoint performance dramatically.

Individual farm server performance

Metalogix Backup for SharePoint relies on the Metalogix Backup for SharePoint Service hosts and the farm servers to collect data. Performance impediments on the servers impact the performance of Metalogix Backup for SharePoint.

When you compress or encrypt backups, you increase the workload of the Metalogix Backup for SharePoint Service hosts. With modern, multi-core x64 systems, hardware performance is a relatively smaller issue.

How do farm backups fit into my disaster recovery plan?

You can perform farm backups for SharePoint 2013, 2016, 2019 and Subscription Edition farms. Farm backups help you to back up the following SharePoint items:

- Content databases
- Service applications
- Farm configuration information
- Search components

Farm backups use the Microsoft Volume Shadow Copy Service (VSS) to back up the components as your farm works.

Farm backup is a best fit in the following cases:

Use	Comments
Back up the entire SharePoint farm.	RPO is driven by the backup schedule. RPOs and RTOs are significantly shorter. Configuration data is included in the backup, but you use that data to perform a manual rebuild of the SharePoint environment.
Large scale backup of SharePoint content databases.	RPO is driven by the backup schedule. Lets you quickly restore content databases in place to recover lost or corrupt data.

Farm backups are a poor fit in the following cases:

Use	Comments
Bare metal restore scenarios.	Metalogix Backup for SharePoint helps you to back up critical farm components, but you must have a functioning SharePoint 2013, 2016, 2019 or Subscription Edition farm. Metalogix Backup for SharePoint does not protect the underlying operating system, the SQL Server installation, or any dependent systems.
Very high speed restore with a very low RTO.	Recovery speeds are limited by the ability to move backed-up data over the network from the backup location. In addition, optional decryption and decompression can add time to the process. Metalogix Backup for SharePoint is not a high availability (HA) solution.

Restoring and rebuilding from a farm backup

When disaster strikes, Metalogix Backup for SharePoint can help you to restore your SharePoint 2013, 2016, 2019 or Subscription Edition farm. When you use Metalogix Backup for SharePoint to restore, you must first have a functional, minimally-configured SharePoint 2013, 2016, 2019 or Subscription Edition farm. The restore procedures vary based on your specific environment.

What online guidance exists for restoring a farm?

The following articles may help you to develop your procedures when you restore:

- Restore a Web application.

    - Add content databases in SharePoint 2013, 2016, 2019 or Subscription Edition farm https://docs.microsoft.com/en-us/SharePoint/administration/add-a-content-database
    - Restore Web applications in SharePoint 2013, 2016, 2019 or Subscription Edition https://docs.microsoft.com/en-us/SharePoint/administration/restore-a-web-application
- Configuration-only restore.
    - Restore farm configurations in SharePoint 2013, 2016, 2019 or Subscription Edition https://docs.microsoft.com/en-us/SharePoint/administration/restore-a-farm-configuration
- Restore service applications in SharePoint 2013, 2016 or 2019 https://docs.microsoft.com/en-us/SharePoint/administration/restore-a-service-application
- Provision search.
    - Restore Search service applications in SharePoint 2013, 2016, 2019 or Subscription Edition https://docs.microsoft.com/en-us/SharePoint/administration/restore-a-search-service-application

How do I restore portable configuration settings in a configuration-only restore?

When you perform a configuration-only restore, you can restore the following settings:

- Antivirus configuration.
- Information rights management (IRM) configuration.
- Outbound e-mail settings (only when you perform an "overwrite").
- Customizations deployed as trusted solutions.
- Diagnostic logging configuration.

When you perform a configuration-only restore, use the following steps:

- Attach the source farm configuration database to a SQL Server deployment.
- Perform a configuration-only backup on the new farm with the Backup-SPConfigurationDatabase cmdlet. When you perform the backup, specify the SQL Server where the source farm configuration database is located.
- Perform a configuration-only restore with the Restore-SPFarm cmdlet using the backup that you created.

How do I restore the .NET framework configuration and IIS configuration?

You can restore the .NET framework configuration files and the Internet Information Service (IIS) configuration files out of place. When you perform the restore, you can use the restored files as a

guide to configure your settings in the .NET framework and in the IIS settings. It is not possible to safely replace these configuration files on your computer.

How do I restore the SharePoint registry?

You can restore the SharePoint registry out of place. When you perform the restore, you can use the restored files as a guide to configure your SharePoint registry settings in the registry editor. It is not possible to safely replace registry on your computer.

How do I restore the certificate store?

You can restore the Windows certificate store out of place to a location that you specify. You can use the Windows Certificate Manager to import the certificate file.

How do I restore a Web application and its content?

Use the following steps to restore a Web application and its content:

- Attach the restored content databases to the desired SQL Server instance or instances.
- Use the Configuration Browser in the Metalogix Backup for SharePoint Management Console to view the configuration settings in the backup set, and then use the settings as a guide to create the Web applications in SharePoint Central Administration.
- Use the Manage Content Database Settings tool in SharePoint Central Administration to remove the default database.
- Use the Add a Content Database tool in the SharePoint Central Administration page to attach the restored content databases. You can also use the Mount-SPContentDatabase cmdlet to attach the databases.

NOTE: You must attach each content database separately.

How do I restore a service application?

Service application instances can be restored via the Metalogix Backup for SharePoint product. No other manual configuration is required after the instance is restored.

How do I restore search?

Your search settings are unique, and so is the procedure that you use to restore search databases. You can restore search facilities out of place or in place.

When you perform an in-place restore, you can restore the search components as part of a larger restore of the entire farm. You include the search components when you select the farm components

to restore in the Metalogix Backup for SharePoint Management Console. You restore the farm components to a new SharePoint farm, replacing the existing components.

In general, you can use the following guidelines when you restore search out of place:

- Provision the search service on the new SharePoint farm. You can use the Configuration Browser in the Management Console to view the configuration settings in the backup set, and then use the settings as a guide for the new search settings.
- When the search service is built, do the following:
  - Stop the time service and the search service. The SharePoint Foundation Search service is named SharePoint Foundation Search v4. The SharePoint Office Search Service is named SharePoint Server Search 14.
  - Delete the search service application databases.
  - Restore the prior search databases and their index files out-of-place.
  - Reattach the restored database files to the desired SQL Server instance or instances.
  - Delete the existing index files.
  - Copy the restored index files to the index server. Make sure to copy the contents of the restored search, crawl, and query folders to the index server. You do not restore the folders themselves because the GUID for the new folders does not match the GUID for the restored folders.
- Restart the search service and the time service.
- Perform an incremental crawl of the site.

How do I restore the global assembly cache, the SharePoint root, or the SharePoint Web application roots?

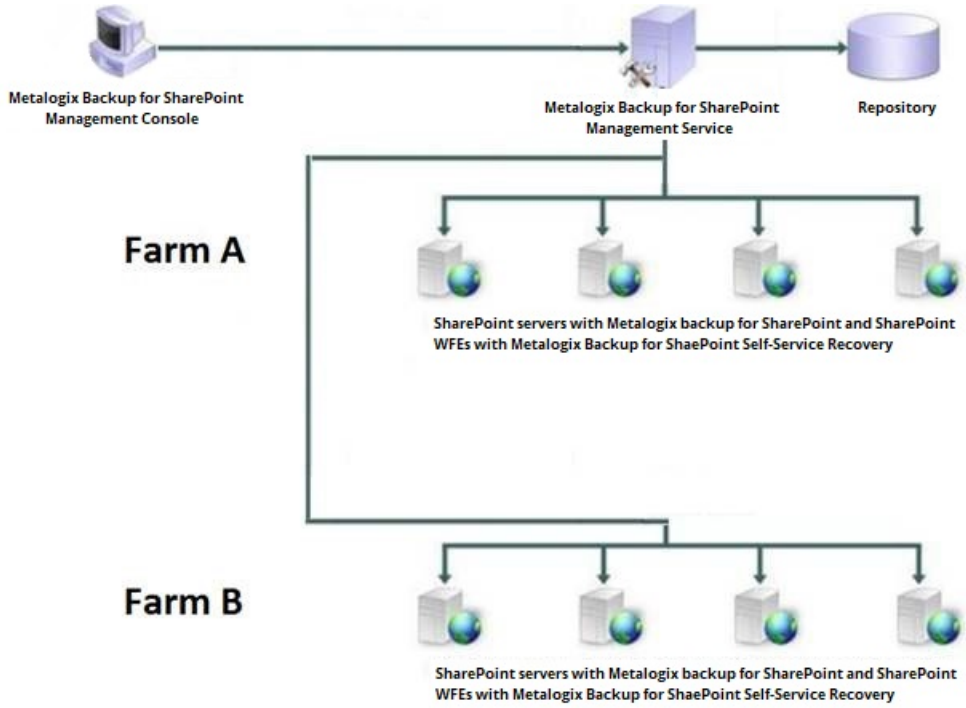
Normally, SharePoint itself manages the contents of the global assembly cache, the SharePoint root, and the Web application roots when you deploy and retract solutions within SharePoint. If you performed decentralized customizations of your SharePoint environment, you may need to perform additional steps to restore those customizations. A decentralized customization requires you to install files into these locations manually. Every decentralized customization is unique, and they may require you to perform additional steps to enable them.

When you restore the global assembly cache, the SharePoint root, or the Web application roots, Metalogix Backup for SharePoint restores the contents of the backup to a directory that you specify. You can then use the original setup instructions for your decentralized customization to perform the customization again, using the files that Metalogix Backup for SharePoint restored.

Components and Architecture

Metalogix Backup for SharePoint provides a robust, easy-to-use SharePoint backup and restore solution. Behind a friendly user interface, this product offers a unique architecture that is both flexible and extremely powerful. Metalogix Backup for SharePoint fits your environment, no matter how simple or complex.

The following diagram illustrates the product components.



Metalogix Backup for SharePoint uses the SharePoint and Active Directory permissions that you set in your environment to control access to content and to farm components.

How does Metalogix Backup for SharePoint address BLOB storage?

In SharePoint, a large majority of file data is stored as binary data streams known as BLOBs (binary large objects). Users can store BLOBs in a remote or external location to avoid using unnecessary space in the content database. Some versions of SQL Server provide remote BLOB storage (RBS) as an API set that facilitates this remote and external storage. You can also use an external BLOB storage medium (EBS) that runs parallel to your content database.

Metalogix Backup for SharePoint works seamlessly with Metalogix StoragePoint, the Metalogix BLOB storage solution. If your content is being externalized using StoragePoint, then you need to configure an endpoint in StoragePoint itself.

If you are using a BLOB storage system aside from Metalogix StoragePoint, then Metalogix Backup for SharePoint will ignore RBS and EBS data when performing a full farm backup. This is because a backup

endpoint cannot be setup, and therefore Metalogix Backup for SharePoint cannot recognize these storage databases.

Components

Metalogix Backup for SharePoint has a light, unobtrusive architecture that easily runs in your environment with minimal configuration. Metalogix Backup for SharePoint does not add to or modify any of your native SharePoint files or services when you install it. When needed, Metalogix Backup for SharePoint does make changes to permissions. For more information about permissions and requirements, see Learning about the requirements.

About the Metalogix Backup for SharePoint Management Console

The Metalogix Backup for SharePoint Management Console (abbreviated to **Management Console**) allows you to configure Metalogix Backup for SharePoint, view operation status and history, schedule automated backup activities, and perform other related functions. Comprehensive Summary pages for specified farms include a view of the backup status and recent backup and restore operations. You also use the Management Console to configure Metalogix Backup for SharePoint and to perform backup and restore tasks.

Multiple copies of the Management Console can all contact a single Management Service. You can let each of the SharePoint administrators in your environment collaborate to perform backup and restore operations. In addition, if your environment includes multiple SharePoint farms, each Management Console can connect to one or more of the farms simultaneously.

You can use the Metalogix Backup for SharePoint installer to install the Management Console and Management Service on a computer, or you can install the Management Console only. If you install only the Management Console, you must install the Management Service on another computer. The Management Console must be installed on a Web Front End (WFE).

About the Metalogix Backup for SharePoint Management Service

The Metalogix Backup for SharePoint Management Service (abbreviated to **Management Service**) receives requests from the Management Console and from the Self-Service Recovery feature. Based on those requests, the Management Service connects to one or more Metalogix Backup for SharePoint Service installations hosted on a SharePoint Web front End (WFE) or on a SharePoint database server and starts the requested operation.

You can install the Management Service on any computer in your network. The Management Service host does not need to be a part of the SharePoint farm, and can manage multiple farms at once. The host that you select should always be running so that it can contact and manage the Metalogix Backup for SharePoint Service when needed. Both the Management Service and the Management Console are installed when you perform a full install of Metalogix Backup for SharePoint. You cannot install only the Management Service.

The Management Service uses the Metalogix Backup for SharePoint repository database to store historical data. Each Management Service uses a separate repository database.

If you schedule an activity, the Management Service initiates the scheduled activity and records its progress and status.

About the Metalogix Backup for SharePoint Service

The Metalogix Backup for SharePoint Service (abbreviated to **Backup Service**) performs any backup and restore operations you request. When an on-demand or scheduled operation begins, the Management Service contacts the Metalogix Backup for SharePoint Service and initiates the operation. The Metalogix Backup for SharePoint Service uses the Microsoft Volume Shadow Copy Service (VSS) to back up SharePoint 2013, 2016, 2019 or Subscription Edition farm components. The Metalogix Backup for SharePoint Service uses the SharePoint object model to backup and restore granular SharePoint content on any SharePoint 2013, 2016, 2019 or Subscription Edition farm.

To perform Farm Backups for SharePoint 2013, 2016, 2019 or Subscription Edition farms, install the Metalogix Backup for SharePoint Service on every WFE and every Database Server in the farm.

The Metalogix Backup for SharePoint Service stores the objects that it backs up in backup sets. Specify a location where the Metalogix Backup for SharePoint Service stores the sets. You can specify a UNC location or a Tivoli Storage Manager (TSM) virtual client node.

Use the Management Console to discover your WFE hosts and standalone database server hosts and install the Metalogix Backup for SharePoint Service. You can also use the Metalogix Backup for SharePoint installer to manually install the service on a WFE host or database server host. You can only install one Metalogix Backup for SharePoint Service on each server, but the Metalogix Backup for SharePoint Service can be shared by multiple Management Service copies. You can back up content databases from a SQL Server host that is shared between farms as part of the relevant farms.

When it starts, the Metalogix Backup for SharePoint Service verifies connectivity to the farm and to the Web applications in the farm. To perform backups, the Metalogix Backup for SharePoint Service account must be assigned a full control policy for every Web application in the farm. When it starts, the Metalogix Backup for SharePoint Service assigns the required policies to the Metalogix Backup for SharePoint Service account. If you add a Web application to the farm, you should restart all of the Metalogix Backup for SharePoint Service copies so that the Metalogix Backup for SharePoint Service can grant privileges for the new Web application.

About the Repository Database

The Metalogix Backup for SharePoint repository database stores configuration information, backup and restore operation data, and statistical and other data that the Management Service collects. Each Management Service uses a separate repository database. A single SQL Server host can host multiple uniquely-named repository databases. The SQL Server that hosts the repository database does not need to be part of the SharePoint farm. The repository database does not store backed-up SharePoint content.

About the Self-Service Recovery Solutions

The Self-Service Recovery feature saves backup administrators time and effort while also giving site collection administrators fast, convenient access to their backed-up library items. You install the Self-Service Recovery feature when you configure Metalogix Backup for SharePoint for your farm.

Communications and Security

Depending on the configuration of your SharePoint farm and your enterprise network, many of the computers in your network can host the Metalogix Backup for SharePoint components. The components use encrypted TCP/IP communications to communicate with one another. Metalogix Backup for SharePoint encrypts all internal communications between components. If a component is not able to negotiate an encrypted communications channel, the communication fails. This helps to ensure the security of your SharePoint data.

Metalogix Backup for SharePoint uses the Microsoft .NET Windows Communications Foundation (WCF) services to secure communications. All communications channels use transport encryption and signing, and do not use non-FIPS encryption methods. All communications within Metalogix Backup for SharePoint are therefore FIPS-compliant.

You can customize the communications ports for each component if you choose. For assistance in changing the port, please visit the Metalogix Technical Support Web page at https://support.quest.com.

Ports Used During Metalogix Backup for SharePoint Setup

The following ports must be open during the installation and setup of Metalogix Backup for SharePoint:

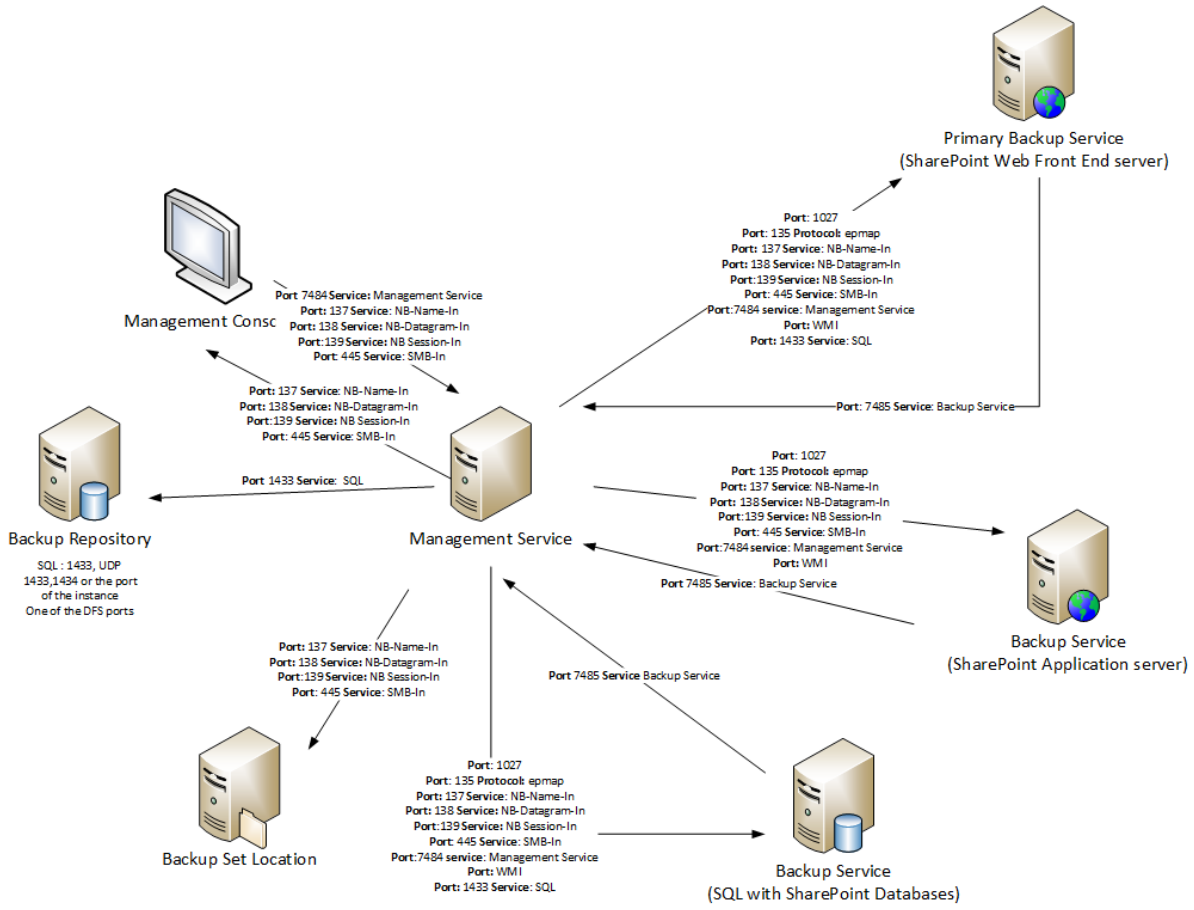
Port	Destination	Details
TCP 1433, UDP 1434, or custom	Management Service > Backup Repository	This port can be replaced if an instance or a non-default port is used for SQL server.
TCP 7484	Management Console > Management Service	This port should be open where the Management Service will be installed.
TCP 7485	Management Service > Backup Service	This port should be open where the Management Service and Backup Services will be installed.
TCP 137,138,139 or TCP/UDP 445	Management service > Backup Service Management Console > Management Service Management Service > SharePoint SQL Server	This port should be open where the Management Service and Backup Services will be installed.

	Management Service > Backup Set location	
TCP 1027	Management Service> WFE Management Service> APP Management Service> SQL	This port should be opened before the Configuration Wizard runs.
TCP 135 or epmap	Management Service> WFE Management Service> APP Management Service> SQL	This port should be opened before the Configuration Wizard runs.
WMI (port 135 and a second, random port)	Management Service> WFE Management Service> APP Management Service> SQL	These ports should be opened before the Configuration Wizard runs in order for farm configuration retrieval to take place. To set up a fixed port for WMI instead of using a random one, refer to the related article on MSDN: https://msdn.microsoft.com/en-us/library/bb219447(v=vs.85).aspx

Additionally, you should enable the Remote Administration option in the Windows Firewall for each server in the farm to let the Management Console contact the server. Some ports like 1027, epmap, WMI can be closed after the Configuration Wizard finishes installing and/or updating all components on the farm.

All of the Metalogix Backup for SharePoint components should be hosted by computers that are members of the same farm or by farms that have mutual trust relationships defined. Metalogix Backup for SharePoint encrypts Farm Backups with the AES-128 algorithm. AES-128 is FIPS-compliant.

The following image illustrates the ports, protocols and services used by Metalogix Backup for SharePoint during installation and setup:



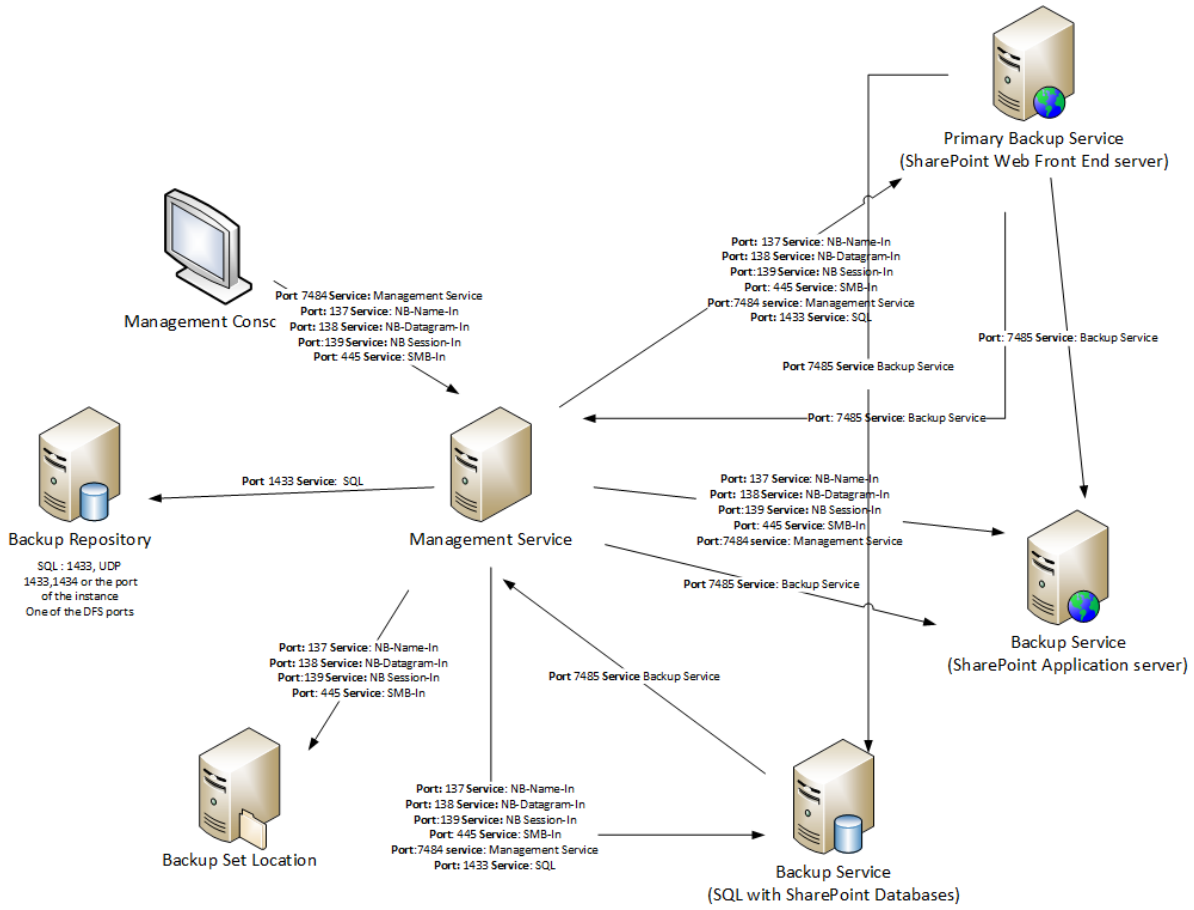
Ports Used for Backup Services

In order to use Metalogix Backup for SharePoint components for daily operations, the following ports need to be open:

Port	Destination	Details
TCP 7484	Management Console > Management Service	
TCP 7485	Management Service > Backup Service Primary Backup Service >Backup Service	
TCP 1433, UDP 1434, or custom	Management Service > Backup Repository	This port can be replaced if an instance or a non-default port is used for SQL server.

TCP 137,138,139 or TCP/UDP 445	Management service > Backup Service Management Console > Management Service Management Service > SharePoint SQL Server Management Service > Backup Set location	This port should be open where the Management Service and Backup Services will be installed.

The following image illustrates the ports that need to be open to perform Metalogix Backup for SharePoint operations:



Tivoli Storage Manager

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.

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 Defining the Backup Service preferences.

NOTE: 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.

3

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.

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.

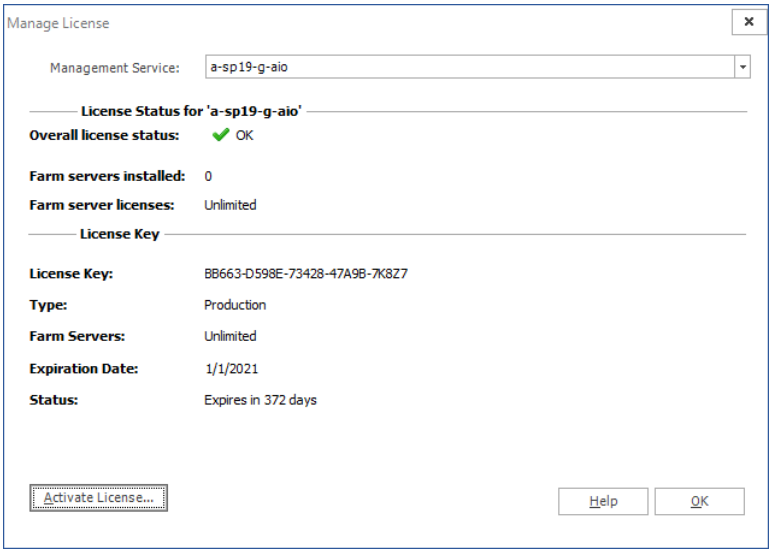
Steps to view the licensed servers

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.

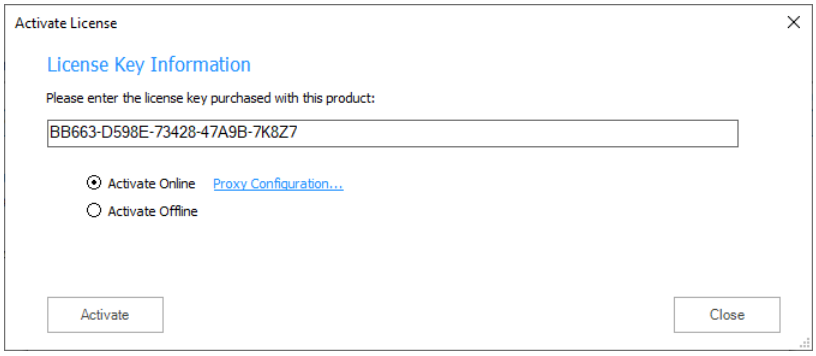


Steps to activate a License Key

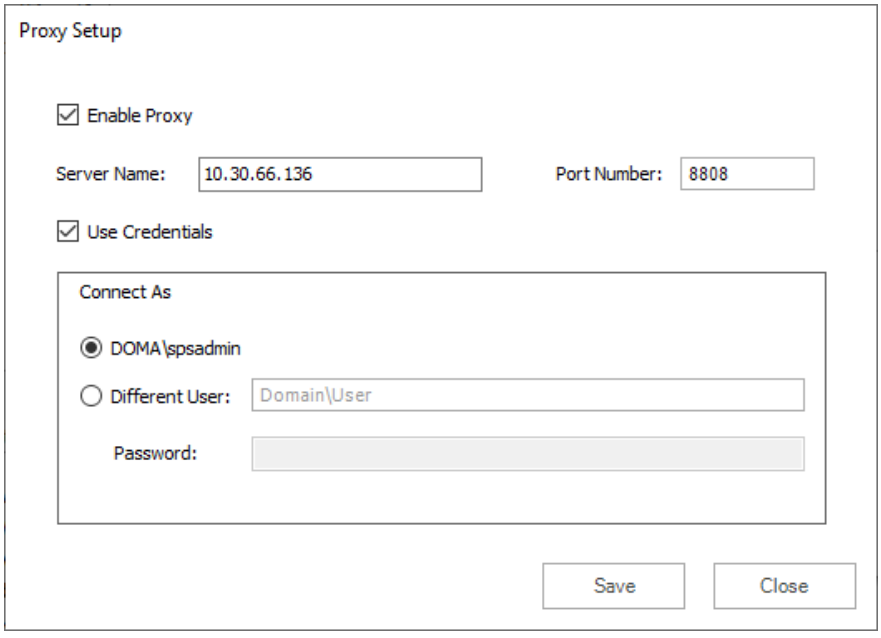
The first time that you open the Metalogix Backup for SharePoint Management Console, you will be prompted to activate a license key. Follow these steps to activate your license key:

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.

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

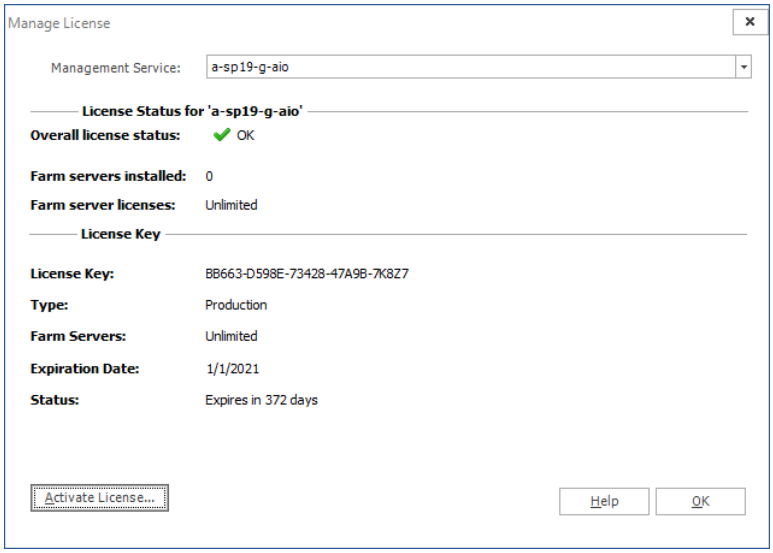
You may need to update a license when you increase the number of servers you want to monitor and you receive another license from Quest.

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

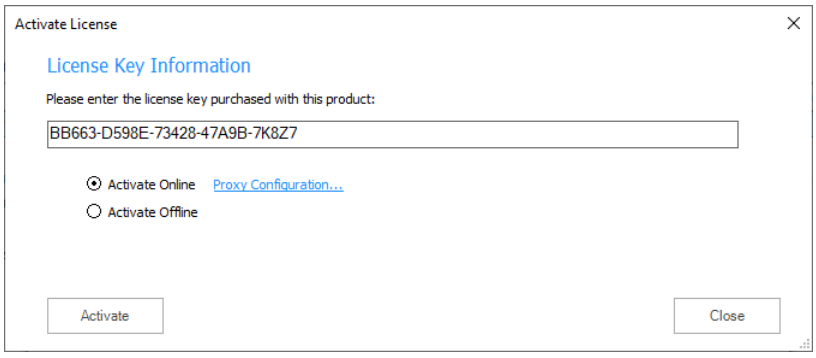
   or

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

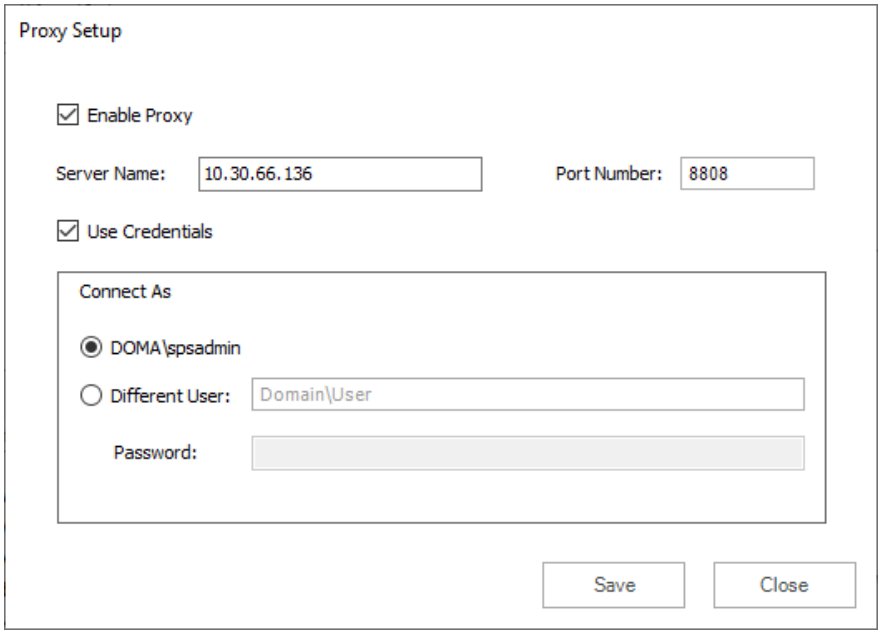
2. In the **Manage Licenses** window, click **Activate License**.



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.



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**.

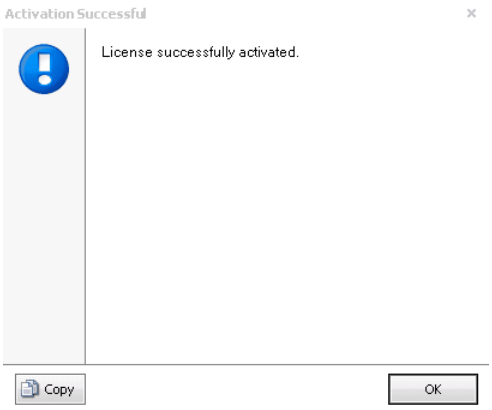
e. Choose the credentials of the logged in user or provide credentials of another user.

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.

> **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.



4

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. 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

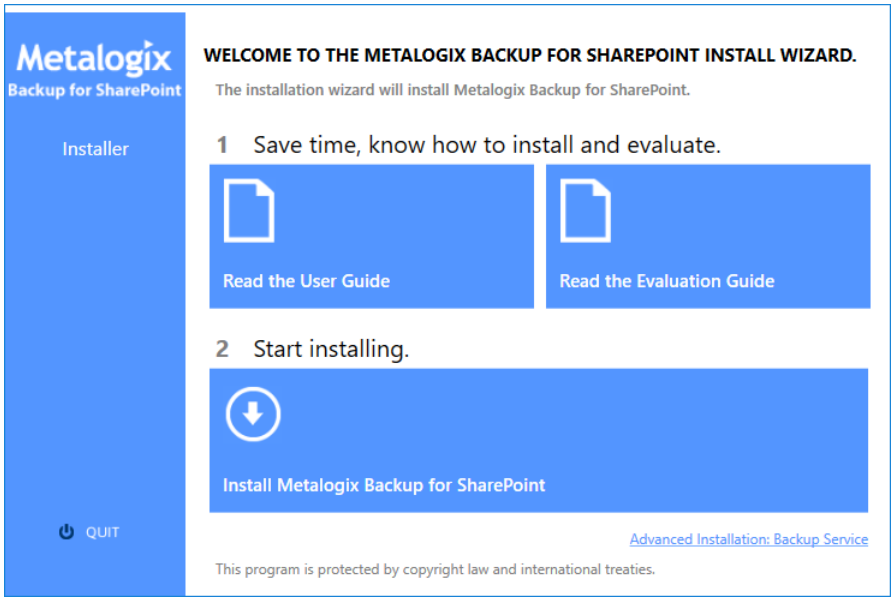
Preparing for an upgrade

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.

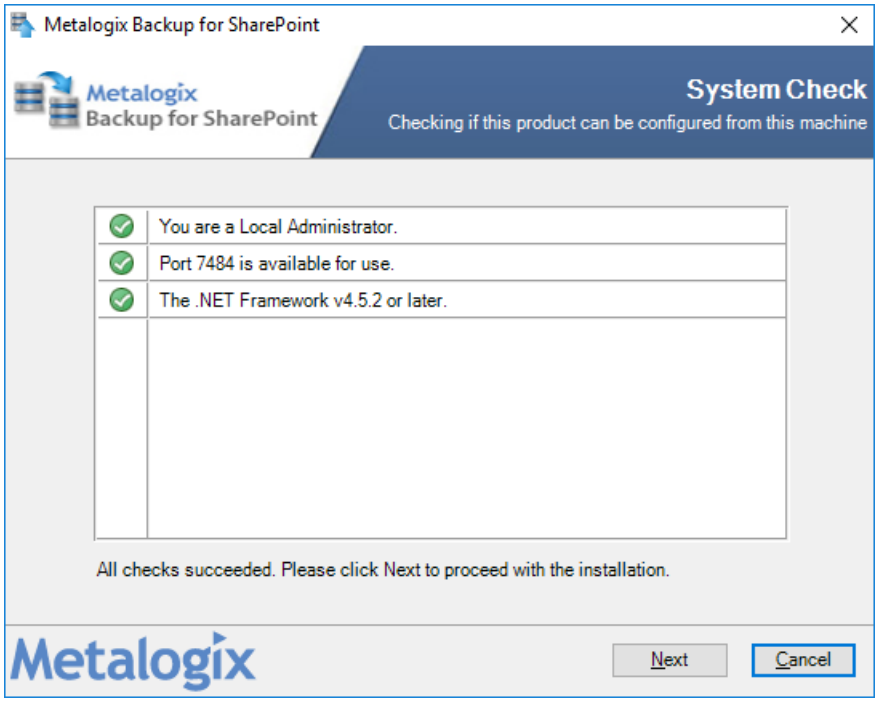
7. If you plan to use farm backups for your SharePoint 2013, 2016, 2019 or Subscription Edition farm, use the Management Console to deploy additional Backup Service instances on every Web front end (WFE) and database server in the farm. For more information about this installation, see Installing the 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

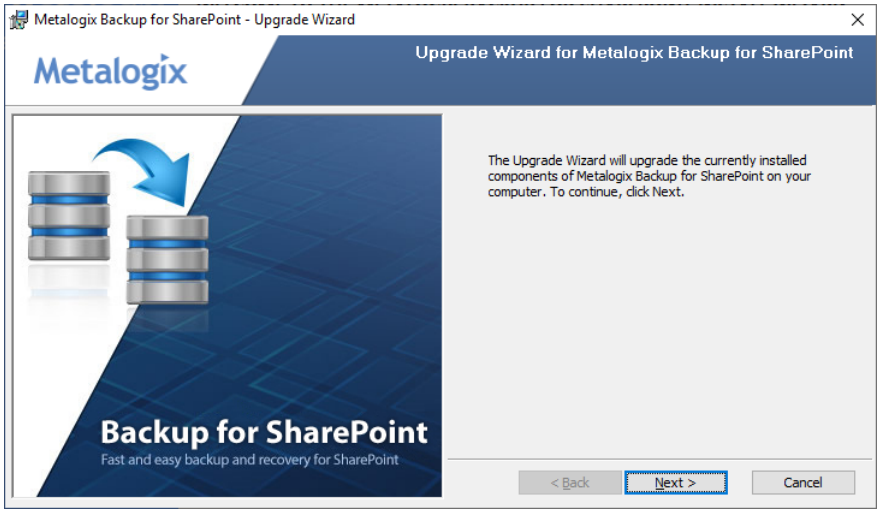
1. Log in to the computer where you want to install Metalogix Backup for SharePoint. You should use a user account that is a member of the local administrators group on the computer. In addition, the account that you use must have the sysadmin role assigned for the SQL Server instance that hosts the 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.



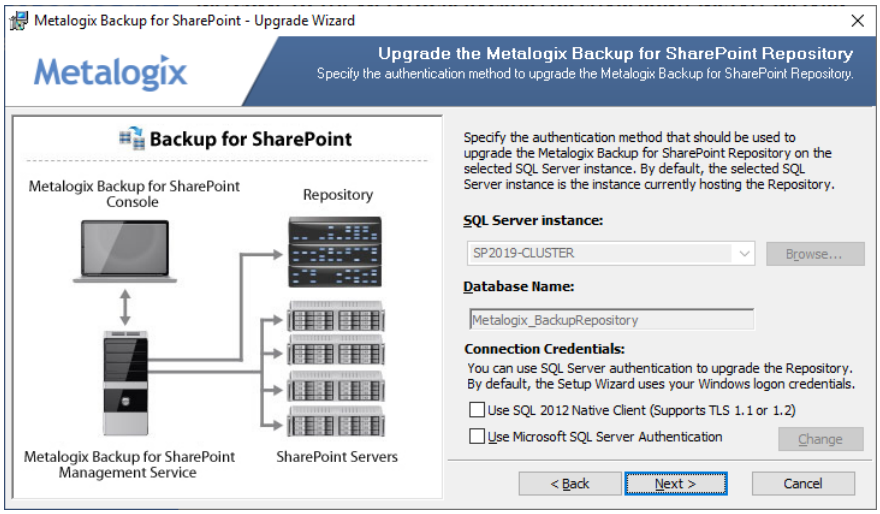
4. Click **Install Metalogix Backup for SharePoint**. The *System Check* window opens.



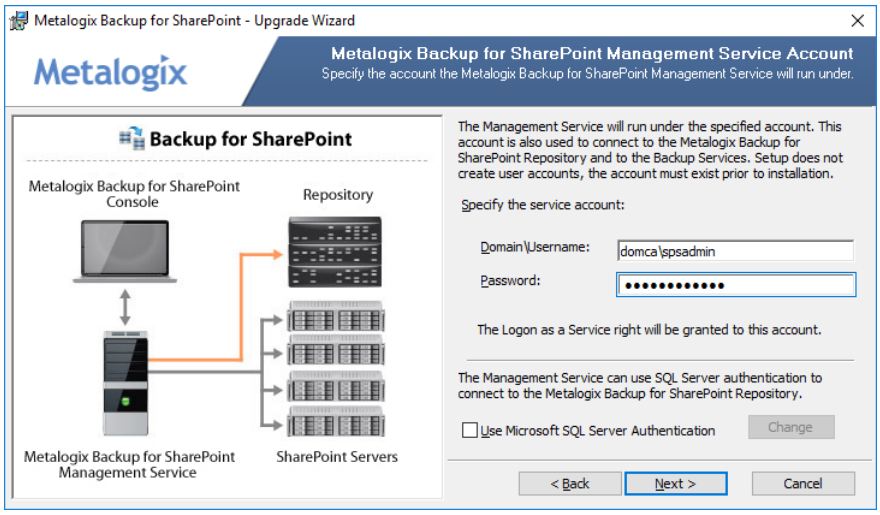
5. You must address the system check failures if any. When all checks succeed, click **Next**. The *Upgrade Wizard for Metalogix SharePoint* opens.



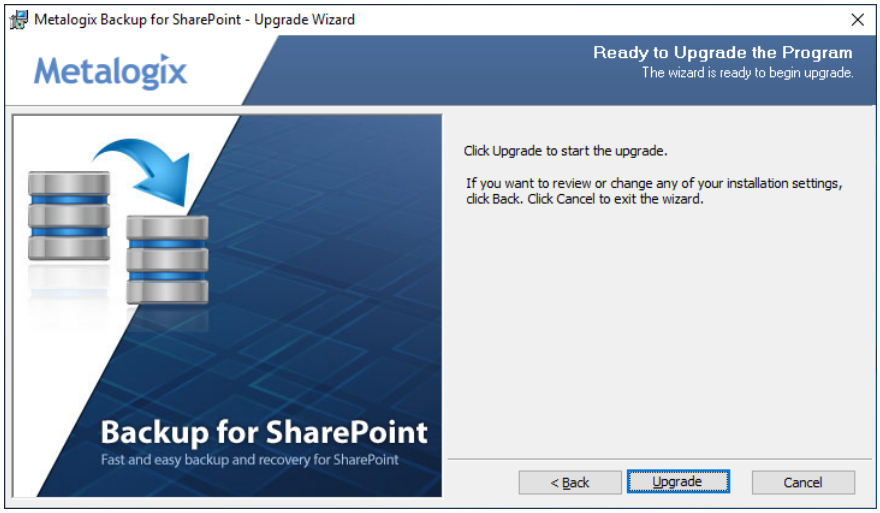
6. Click **Next**. The *Upgrade the Metalogix Backup for SharePoint Repository* window opens.



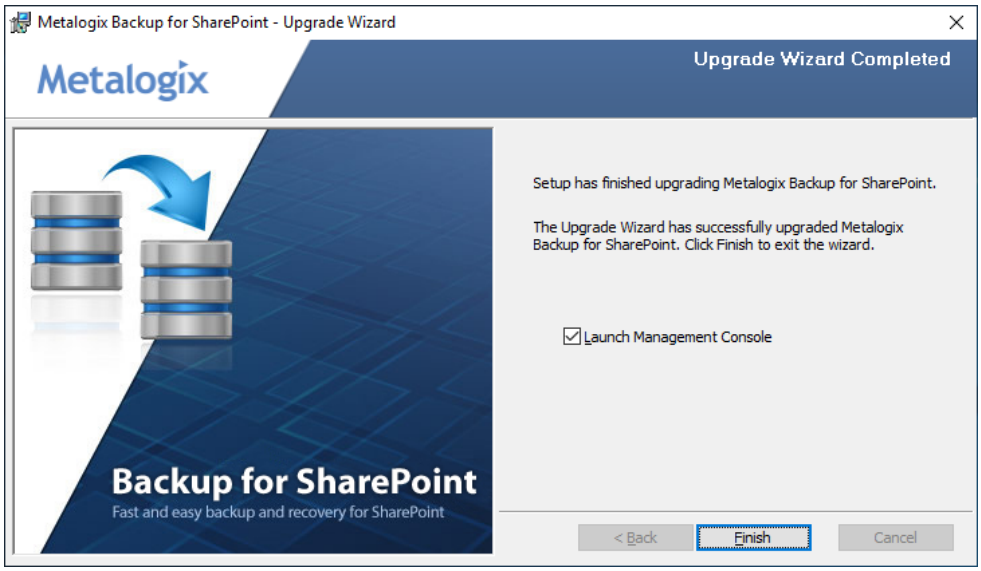
7. Click **Next**. The Metalogix Backup for SharePoint Management Service Account window opens.



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



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



10. Select **Launch Management Console** and click **Finish**.
11. Upgrade all previously deployed Backup Service instances. See Steps to upgrade the Backup Service instances.

Steps to perform a custom upgrade

1. Perform a standard upgrade on the primary host that has the Management Service. See Steps to perform a standard upgrade.
2. Upgrade all previously deployed Backup Service instances. See Steps to upgrade the Backup Service instances.
3. 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:

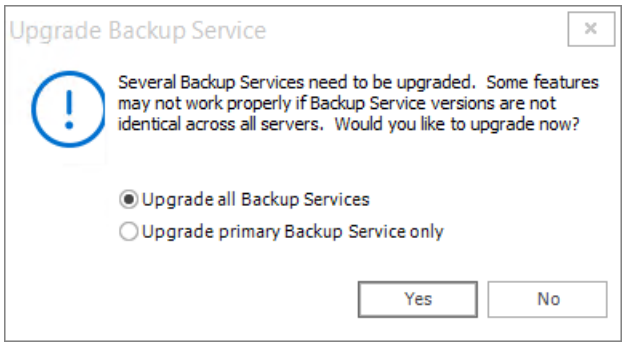
- **Use the Management Console** - The first time that you open the Management Console after an upgrade, the Management Console prompts you to upgrade either the primary Backup Service or all Backup Services that lets you upgrade the services that you may have deployed on other machines. If you choose 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.

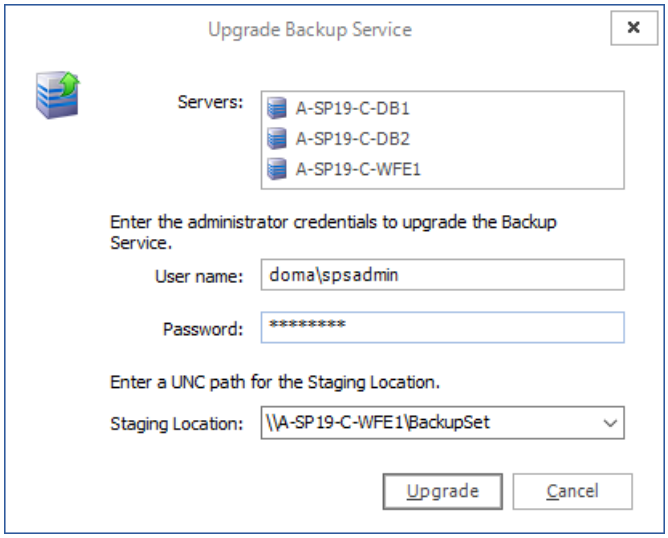


2. Choose an upgrade option as described below:

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:

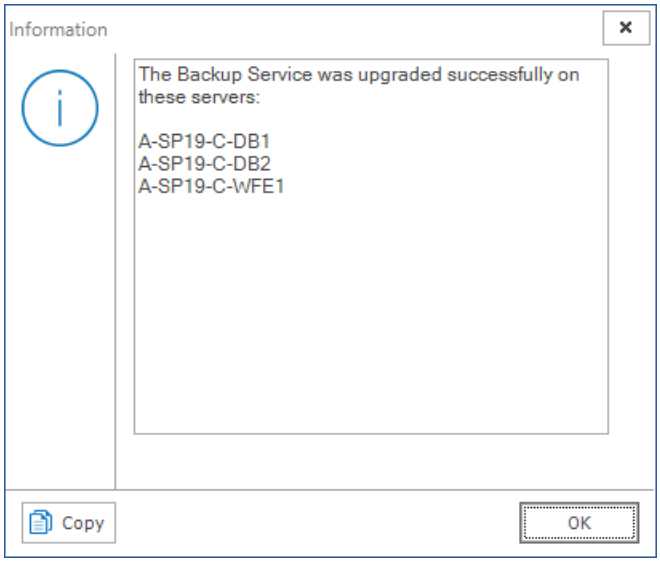
a. **User name** - the windows administrator account name used to run the service.

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.

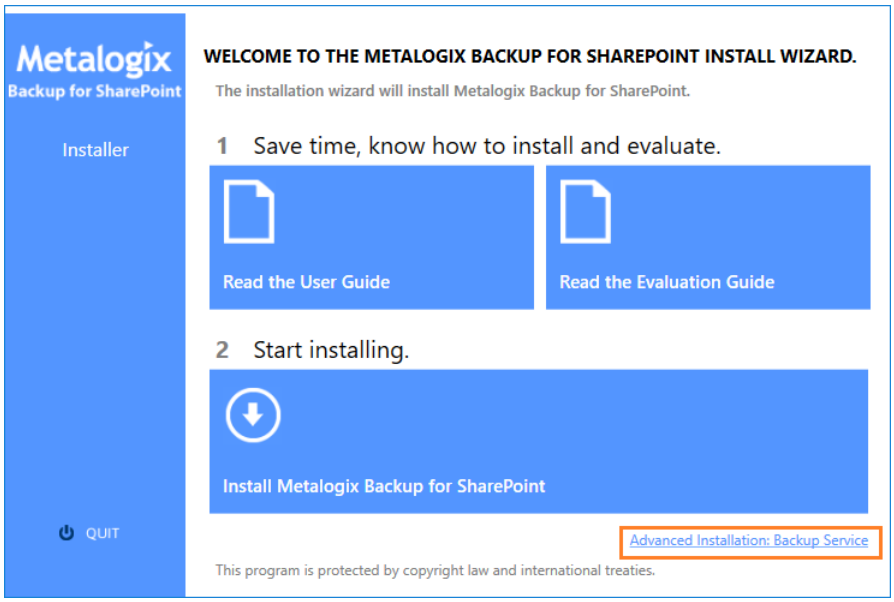
5. Click **Upgrade**. The confirmation window opens indicating the servers where the Backup Service was upgraded.



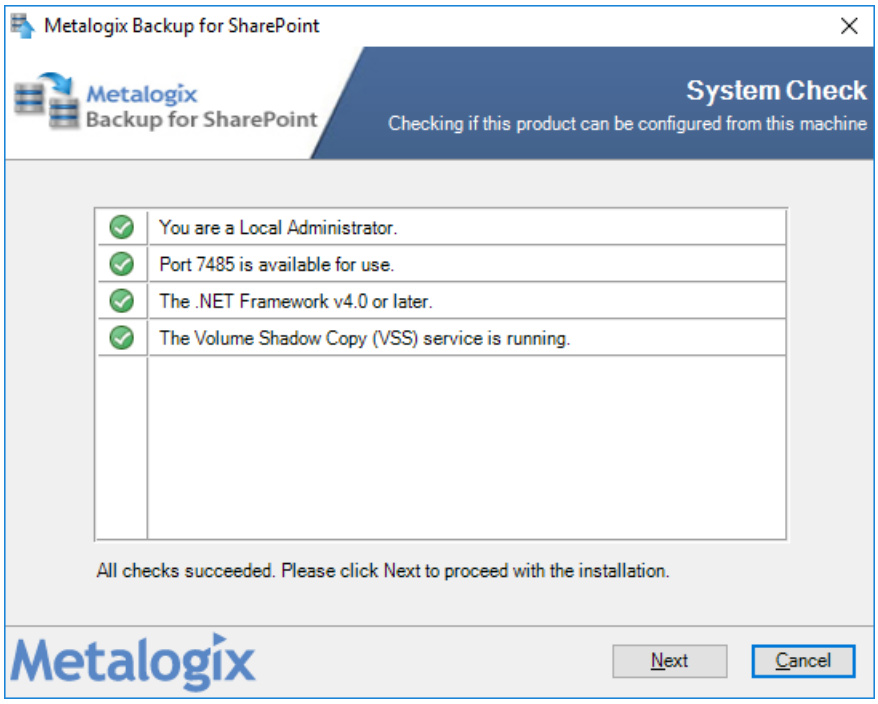
6. In the confirmation window, click **OK**.

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

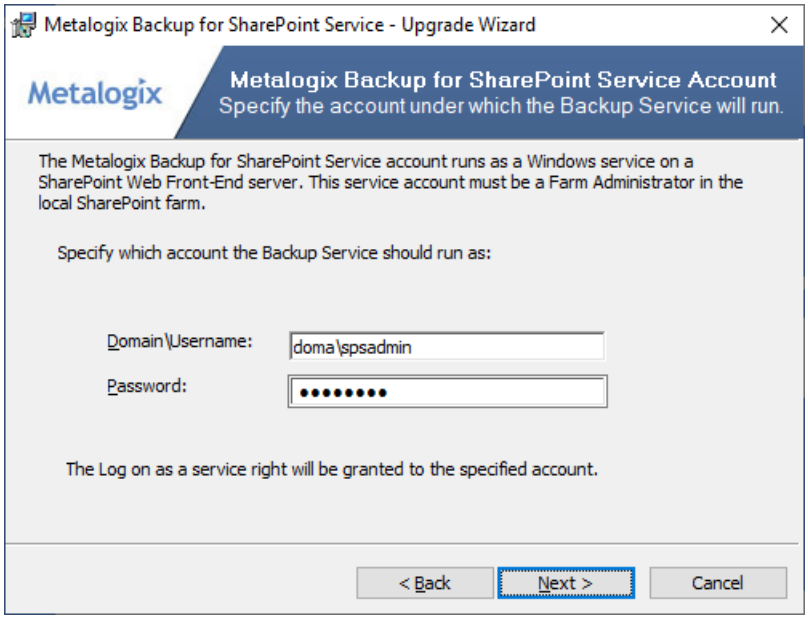
1. Log in to the computer where you want to install Metalogix Backup for SharePoint. You should use a user account that is a member of the local administrators group on the computer. In addition, the account that you use must have the sysadmin role assigned for the SQL Server instance that hosts the 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.



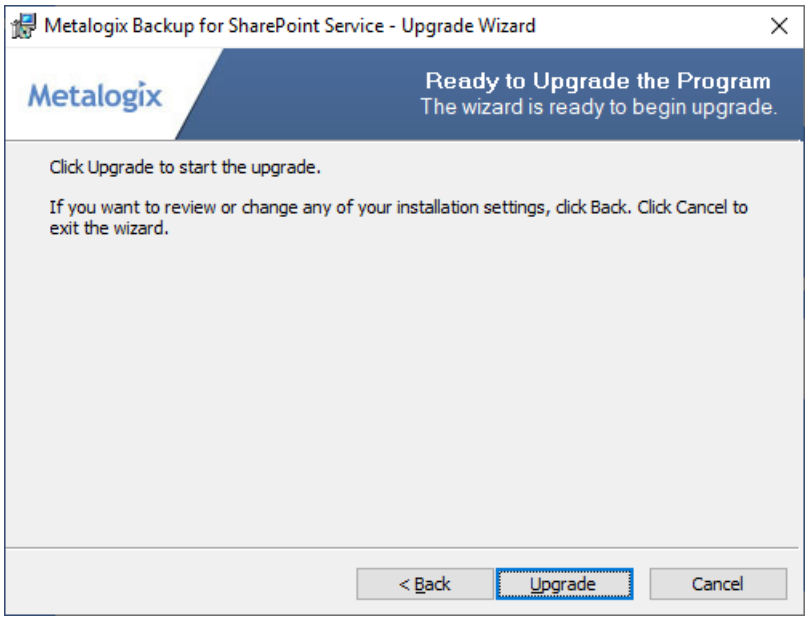
4. Click **Advanced Installation: Backup Service**. The *System Check* window opens.



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.

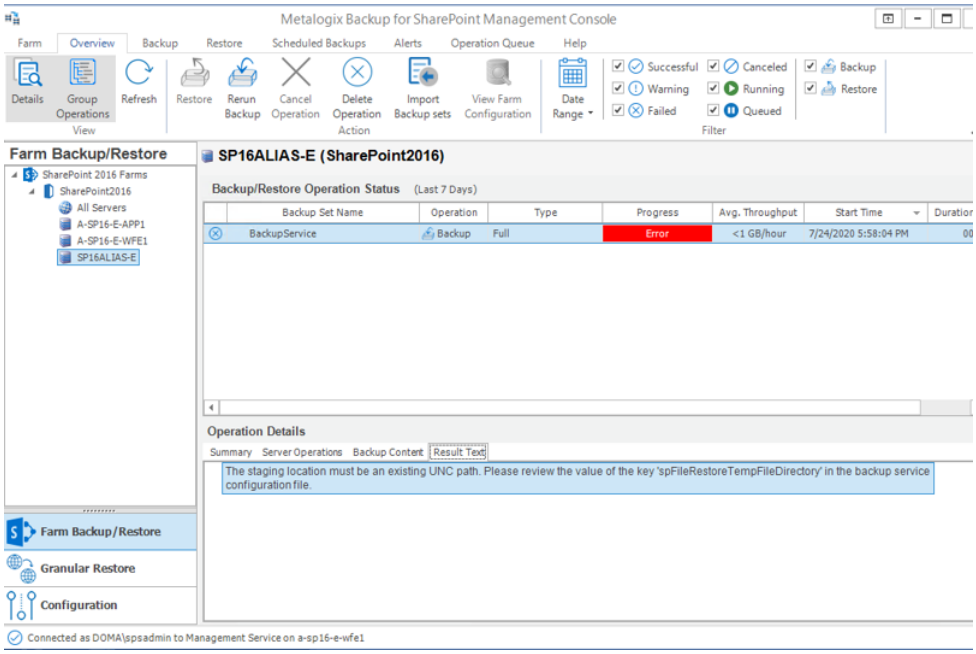


7. Click **Upgrade**. The *Setup wizard Completed window* opens.
8. Verify that the upgrade was successful and click **Finish** to close the wizard. Then click **Quit** to exit the installer bootstrap.

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.

5

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
- Managing licenses
- Managing the Backup Service
- Managing farms
- Managing self-service recovery
- Managing preferences
- Managing alerts
- Managing backup set disk space
- Importing a Repository Database

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.

How do I open the Management Console?

You use the Windows Start Menu to open the Management Console.

> **NOTE:** The first time you open the Management Console after installation, you will be required to enter a valid License key.

To open the Management Console

At the Microsoft Windows desktop, click Start > All Programs > Metalogix > SharePointBackup > **PBManagementConsole.exe**

What permissions does the Management Console require?

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.

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

For more information about the required permissions, see Understanding the granular restore process.

Connecting a standalone 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 farm the first time you start the Management Console. When you add the farm, you specify the name of the Management Service host.

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.

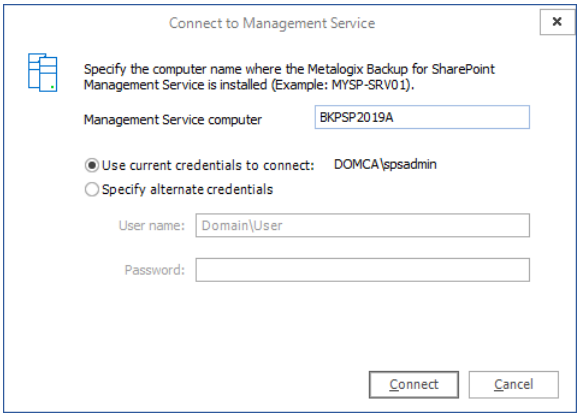
When you specify the name of the Management Service host, you should use one of the following formats:

- DNS name
- Fully-qualified 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.

How do I connect the Management Console to a Management Service?

1. From the Microsoft Windows desktop, click **Start** > **All Programs** > **Metalogix** > **Metalogix Backup for SharePoint**. The Connect Management Service window opens.



   Enter the information as described below:

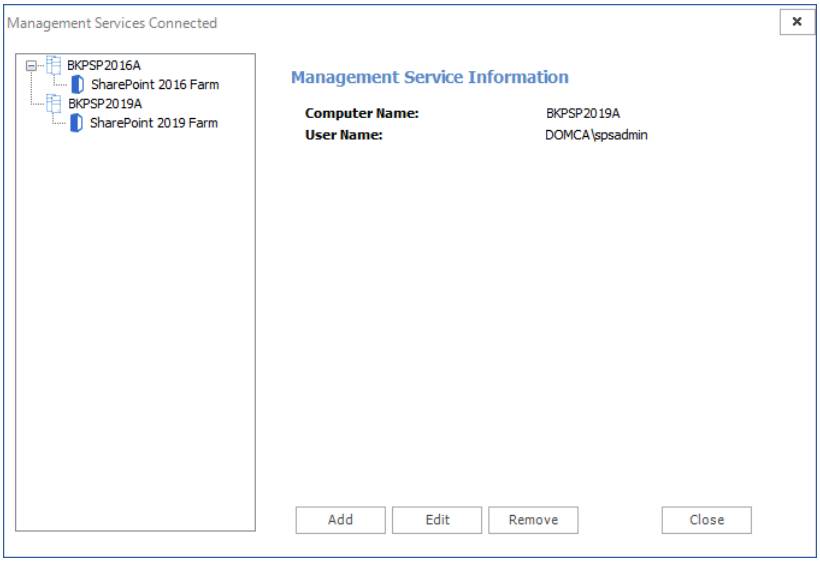
   a. **Management Service computer** - specify the NetBIOS, FQDN or IP address of the computer that hosts the Management Service for the farm.

   b. **Use current credentials to connect** - use the credentials of the logged-in user

   c. **Specify alternate credentials** - enter a user name and password that has access to the Management Service computer.

2. Click **Connect** to finish connecting to the computer that hosts the Management Service.

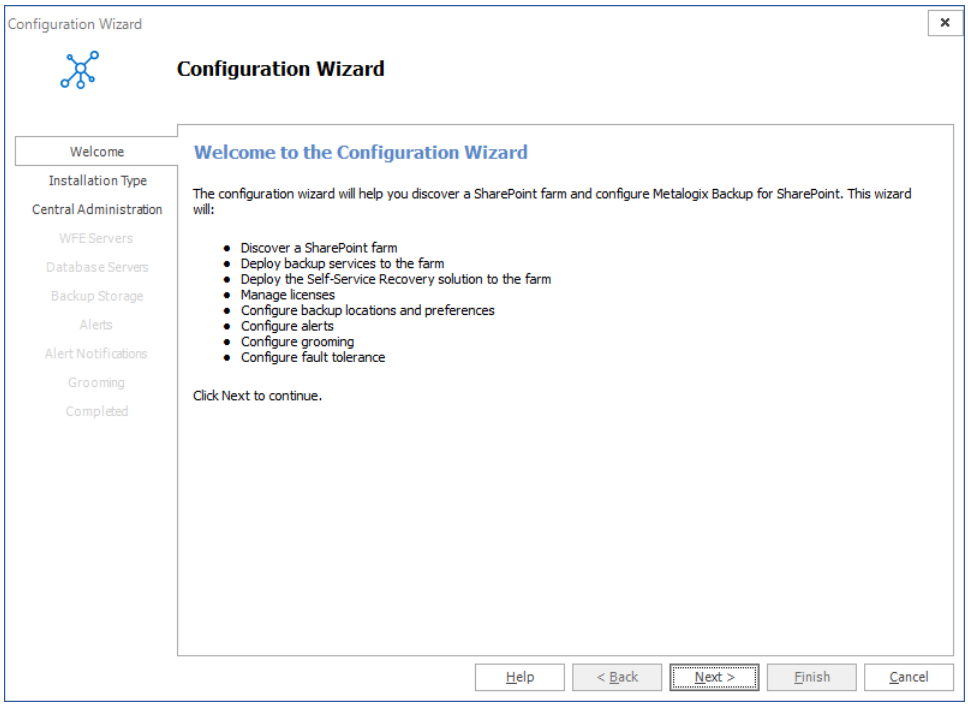
3. Verify that the management service is added.



NOTE: The SharePoint Farm child nodes appear in the Management Services Connected window only if the farms were added to the server that hosts the Management Service. If no farm was added to a server, only the management service node is displayed. If you add one or more farms to the same servers, the SharePoint Farm child nodes will indicate the farms added.

Configuring Metalogix Backup for SharePoint for your farm

If the 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:

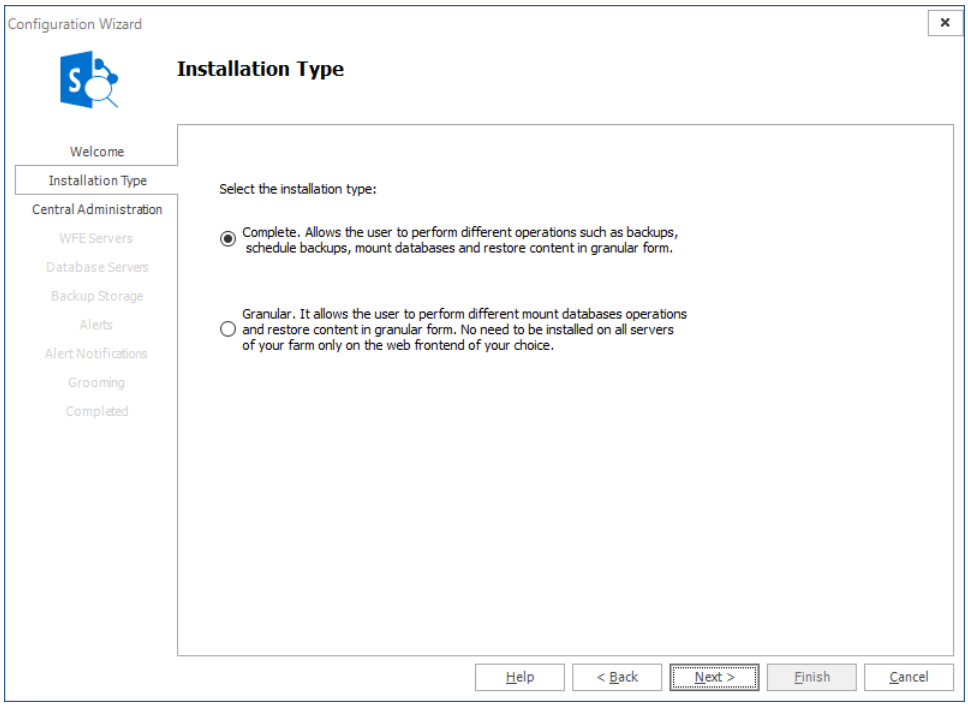
- Connect Metalogix Backup for SharePoint to the SharePoint farm.
- Install one or more Backup Service instances.
- Optionally deploy the Self-Service Restore feature.
- Configure the Metalogix Backup for SharePoint settings.
- Set up alerts and notifications.
- Configure grooming and fault tolerance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

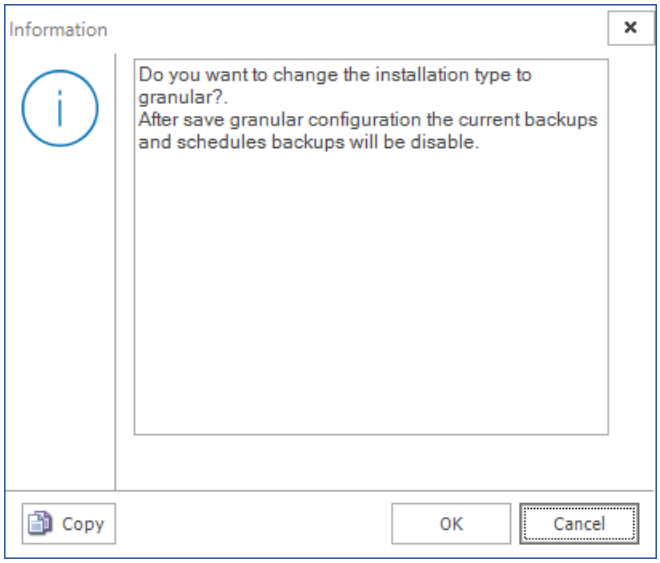
Complete You can perform the full range of operations on all SharePoint servers in a farm. You can perform various backups, you can schedule backups, mount databases and perform granular restore operations. Every time you add a farm and choose this option all other servers in the farm will allow the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



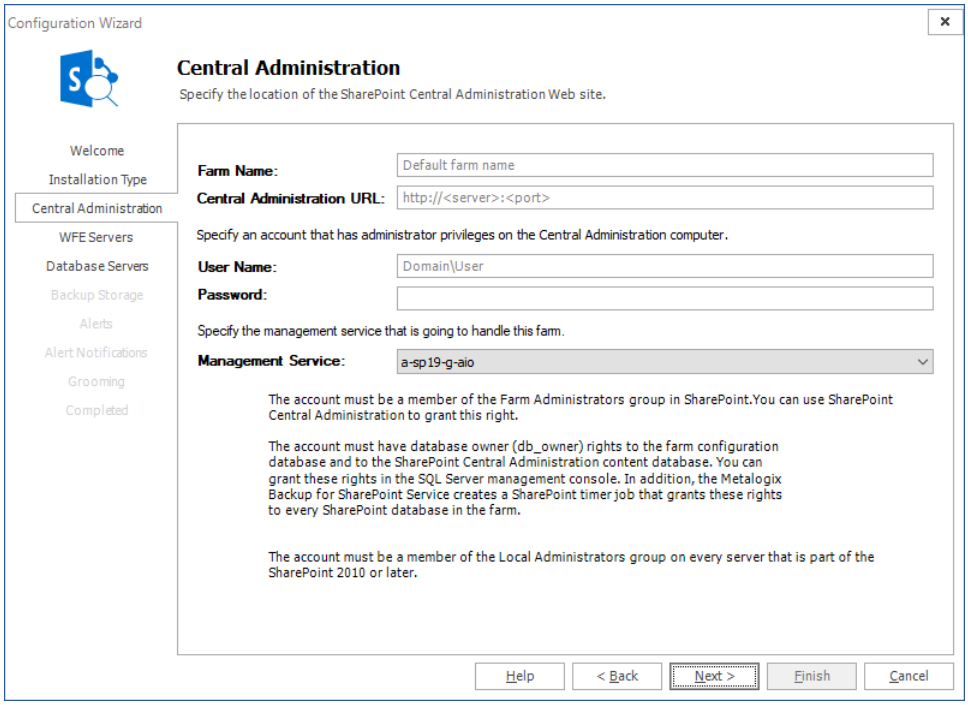
Click **OK**. The Farm Configuration window appears. For next steps see Specifying Farm Connection Settings.

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.

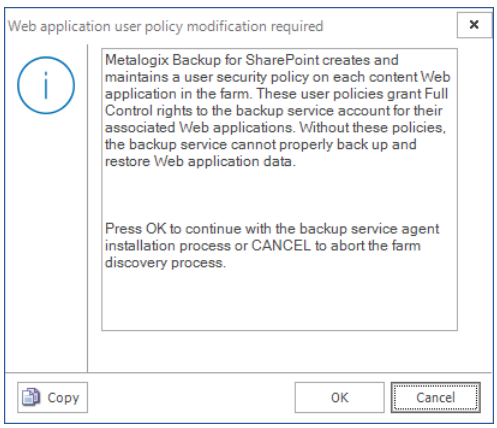
How do I specify the URL and the account to use?

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:

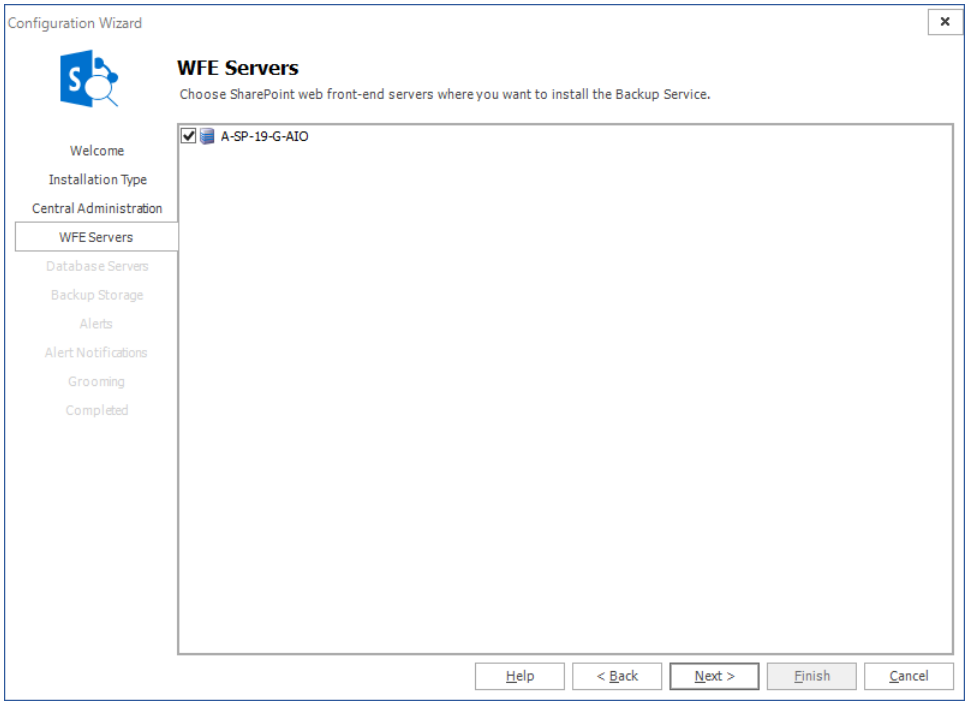
- Must be a member of the SharePoint farm administrators group.
- Must be a local administrator on the computer that hosts the Backup Service.
- Must have at least **db_owner** permissions for all SharePoint content databases, including the **Admin Content** and **SharePoint Config** databases

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.

> **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 WFE servers for 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 2013, 2016, 2019 or Subscription Edition farms, you must install the Backup Service on every WFE and every database server in your SharePoint farm.

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

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

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

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

You can also use the 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.

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**.

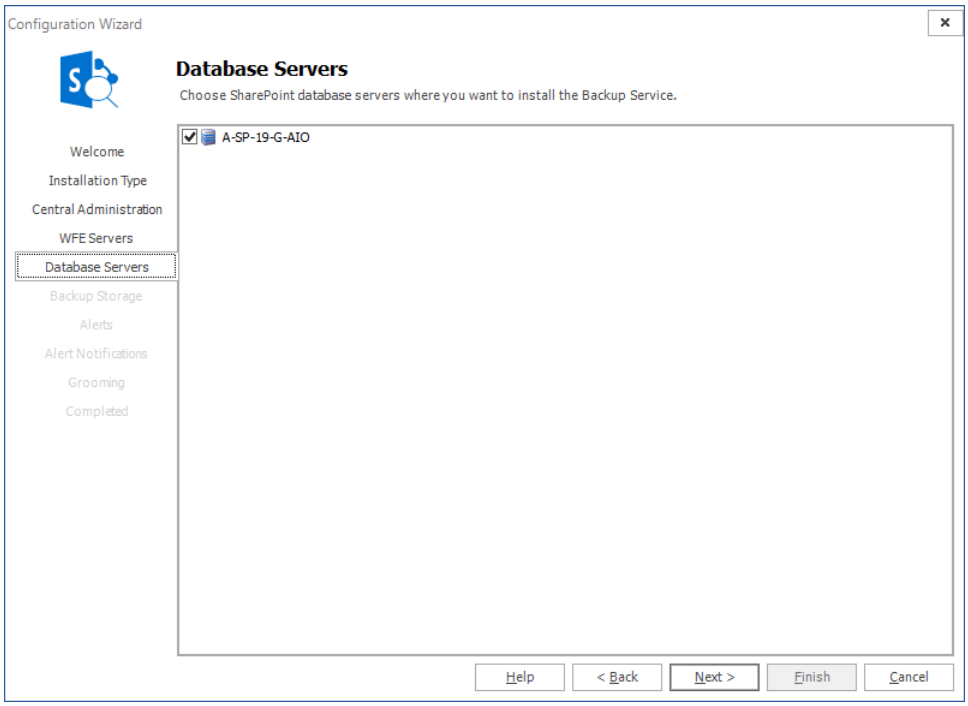
Can I manually install additional Backup Service instances?

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 Database Servers for 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 2013, 2016, 2019 or Subscription Edition 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. 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 Learning about the Backup Service requirements.

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

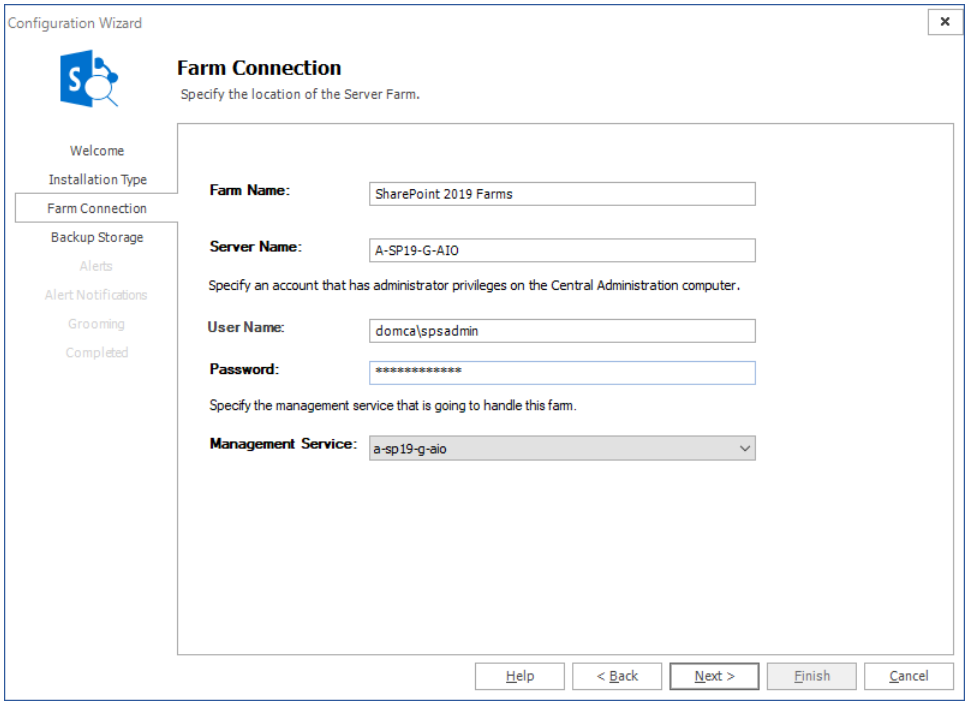
Can I manually install additional Backup Service instances?

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.

Specifying Farm Connection Settings

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



To specify the SharePoint server account

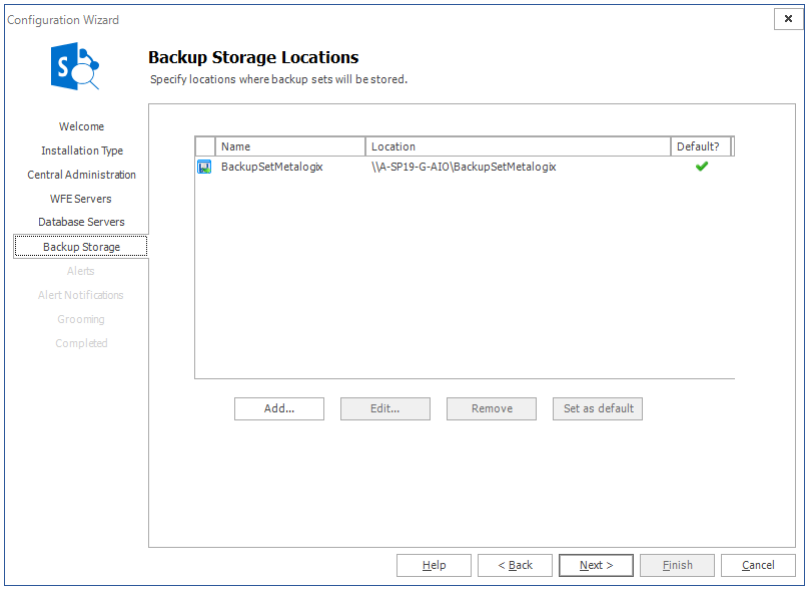
1. In the Farm Connection page of the Configuration wizard, give your farm a name.
2. Type the name and password of the account that Metalogix Backup for SharePoint should use to connect to the Management Service for the farm in the **User Name** and **Password** fields.
3. Select the Management Service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

4. Click **Next**.

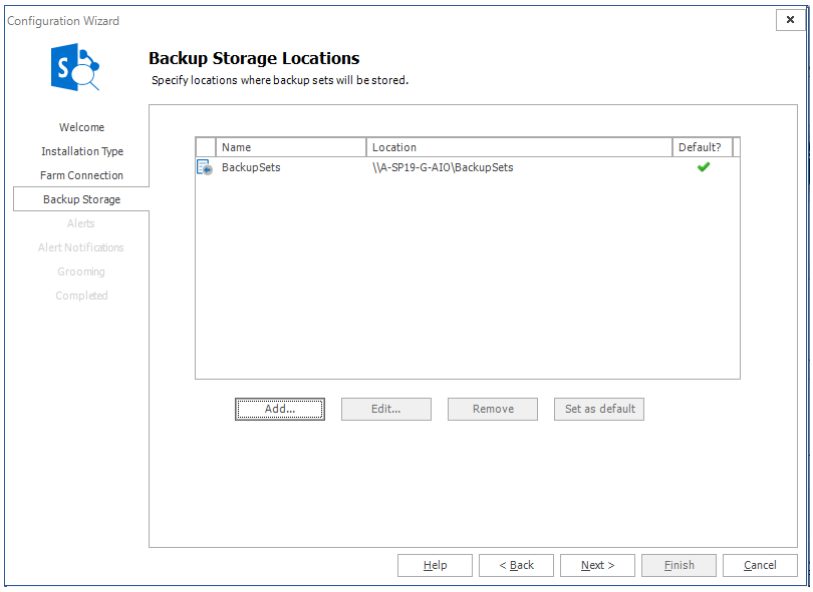
Specifying Backup Storage Locations

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

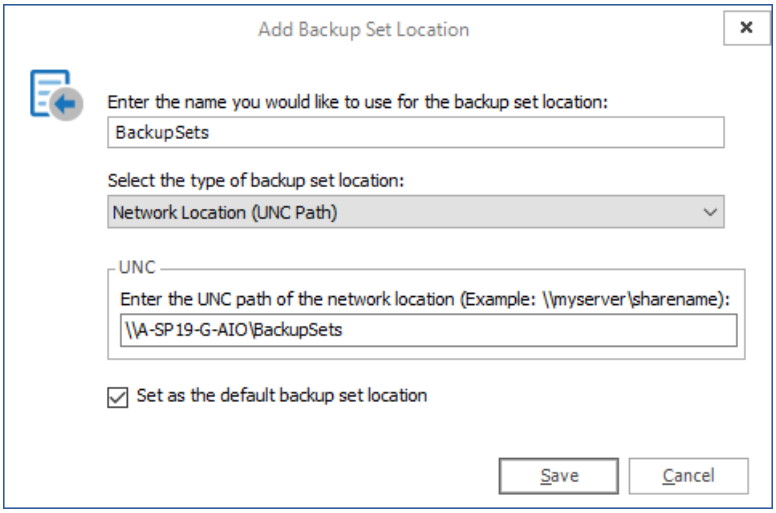
1. Select the **Add** button to open the Add Backup Set Location dialog window.
2. Enter a name for the backup set location in the name field.
3. Select the backup set location type from the drop-down menu below. You can back up content from your SharePoint farms to a network location that you specify 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. For more information about using TSM with Metalogix Backup for SharePoint, see Learning about Tivoli Storage Manager.

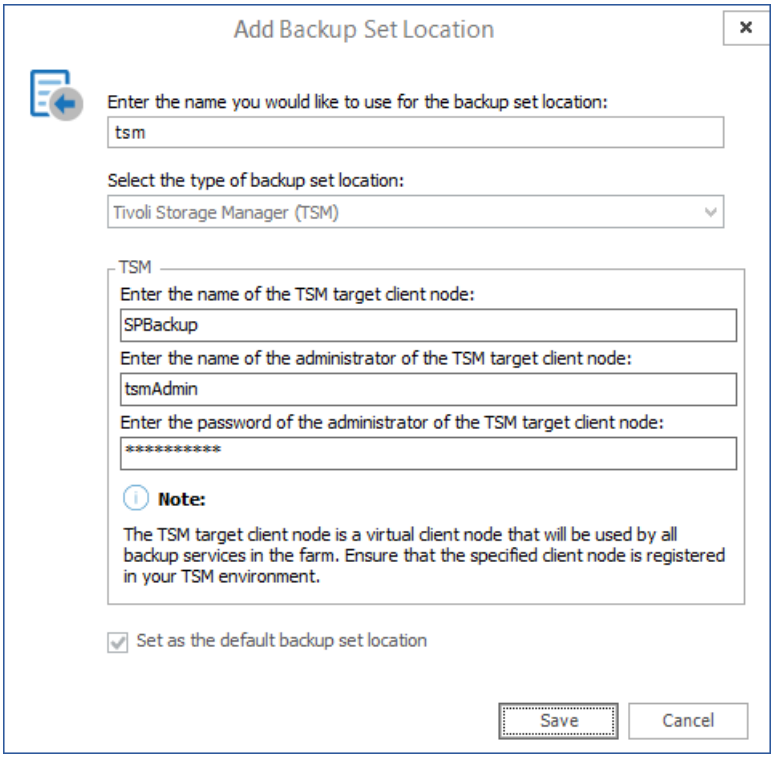
> **NOTE:** If you remove a backup location that Metalogix Backup for SharePoint uses to store data in TSM, removing the location removes references to the data in Metalogix Backup for SharePoint. In addition, Metalogix Backup for SharePoint sets the data objects to Inactive in TSM but does not automatically delete the data itself. If you need to delete the data from TSM, you should use the TSM management tools to do so. For more information about using TSM, see Learning about Tivoli Storage Manager.

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

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



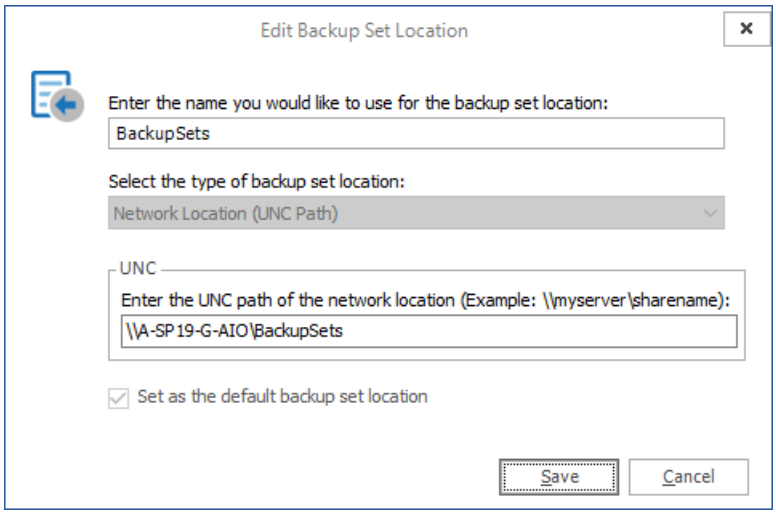
Example 2: Settings for Backup Set Location type = Tivoli Storage Manager (TSM)



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

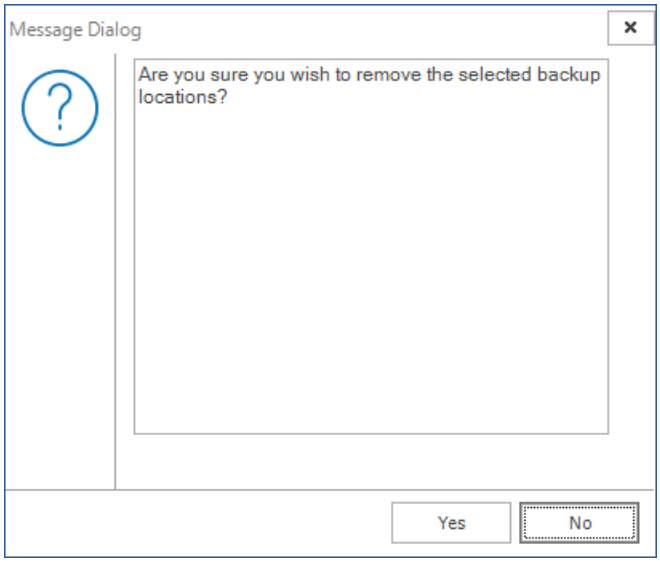
To Edit an Existing Backup Location

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**.



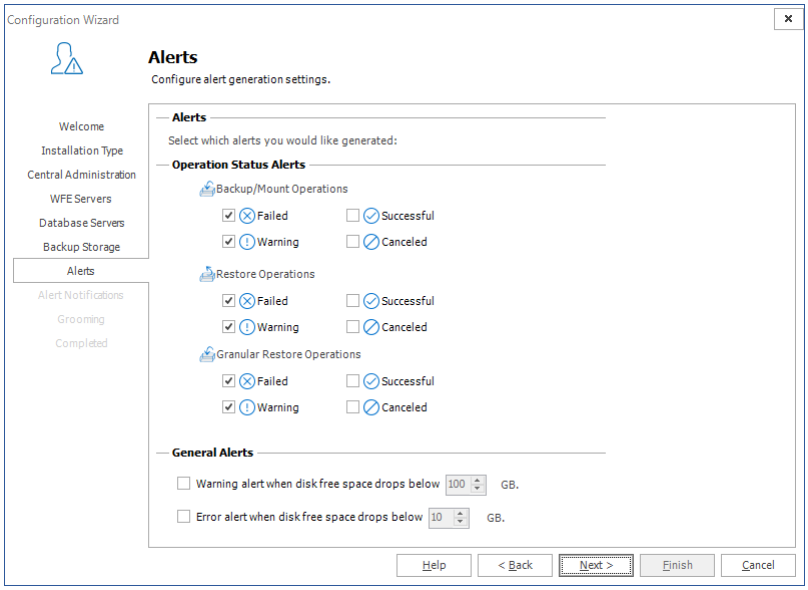
To Change a Default Backup Set Location

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.

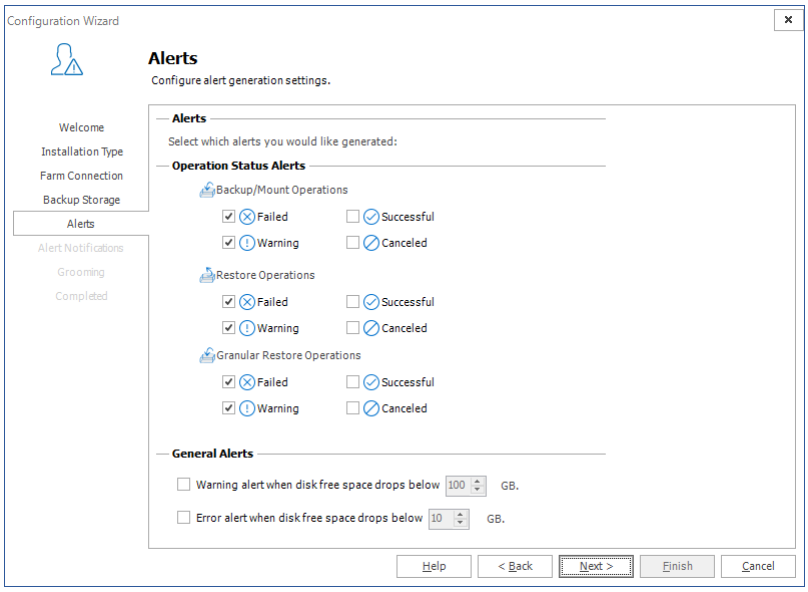
Configuring the Alert settings

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**



Alerts window for Installation Type = **Granular**



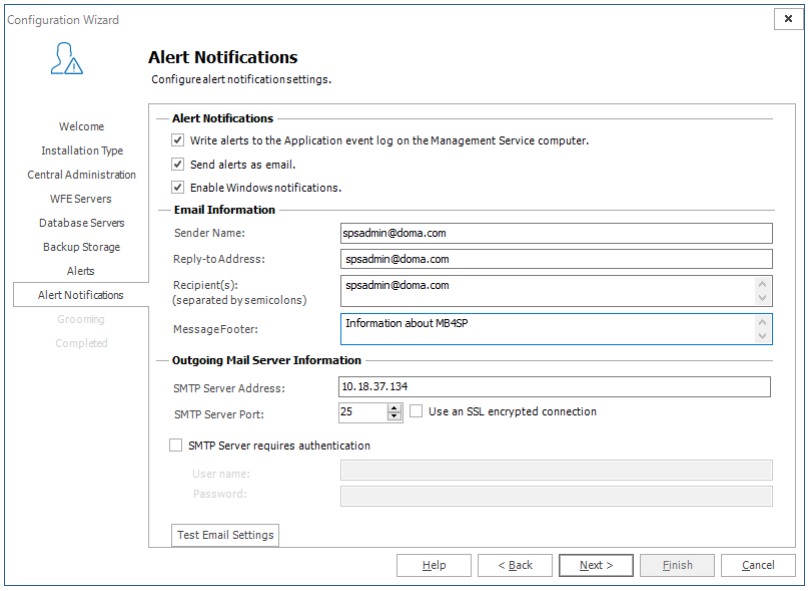
When you have configured the alerts, you can click **Next** to continue in the wizard.

For more information about the conditions that can trigger an alert, see Learning about alerts.

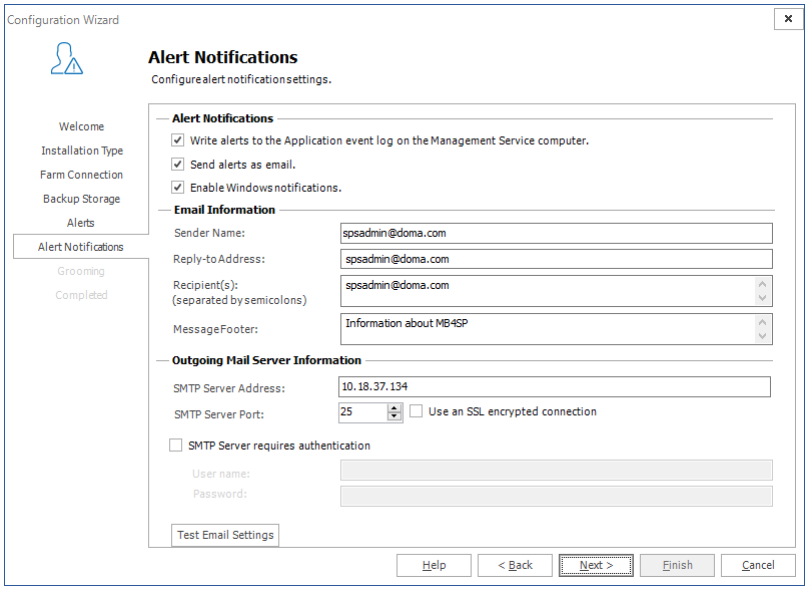
Configuring the Alert Notification settings

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**



Alert Notifications window for Installation Type = **Granular**



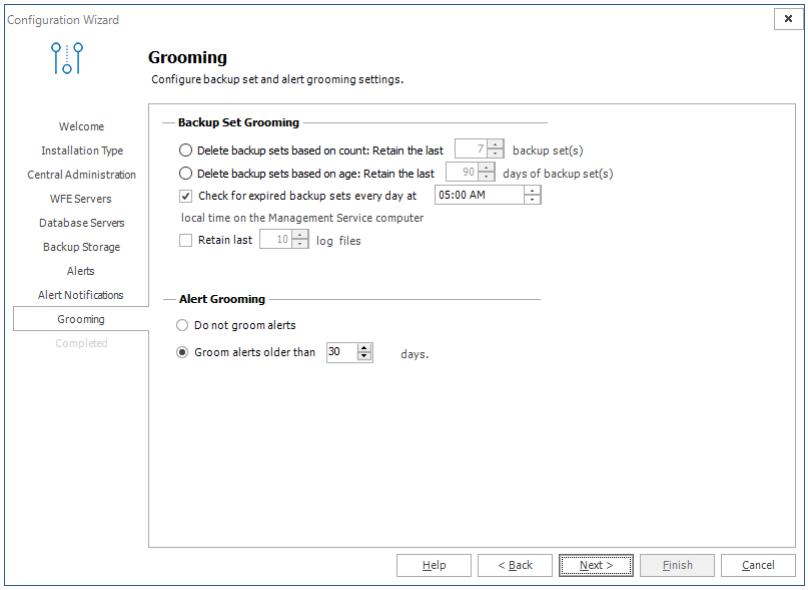
When you have configured the settings, click **Next** to continue.

For more information about the alert notification settings, see Managing the alert notification settings.

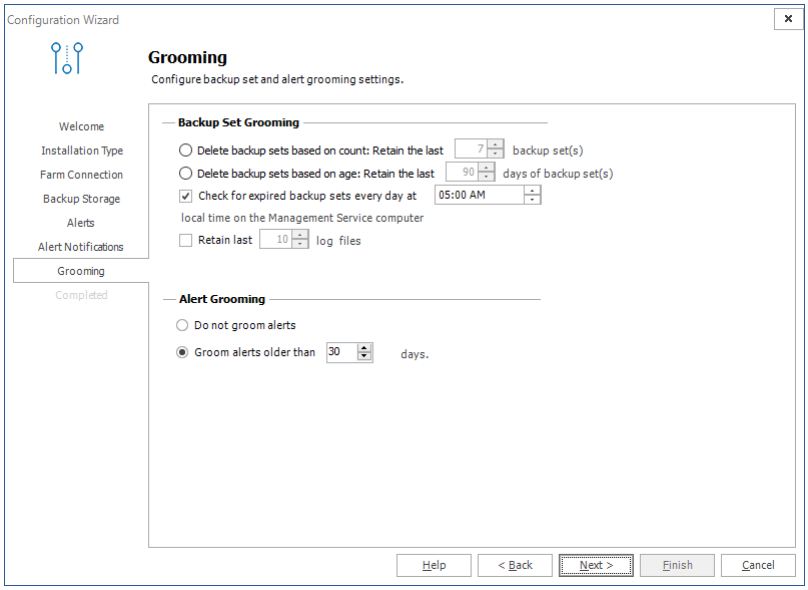
Configuring the Grooming settings

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**



Grooming window for Installation Type = **Granular**



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

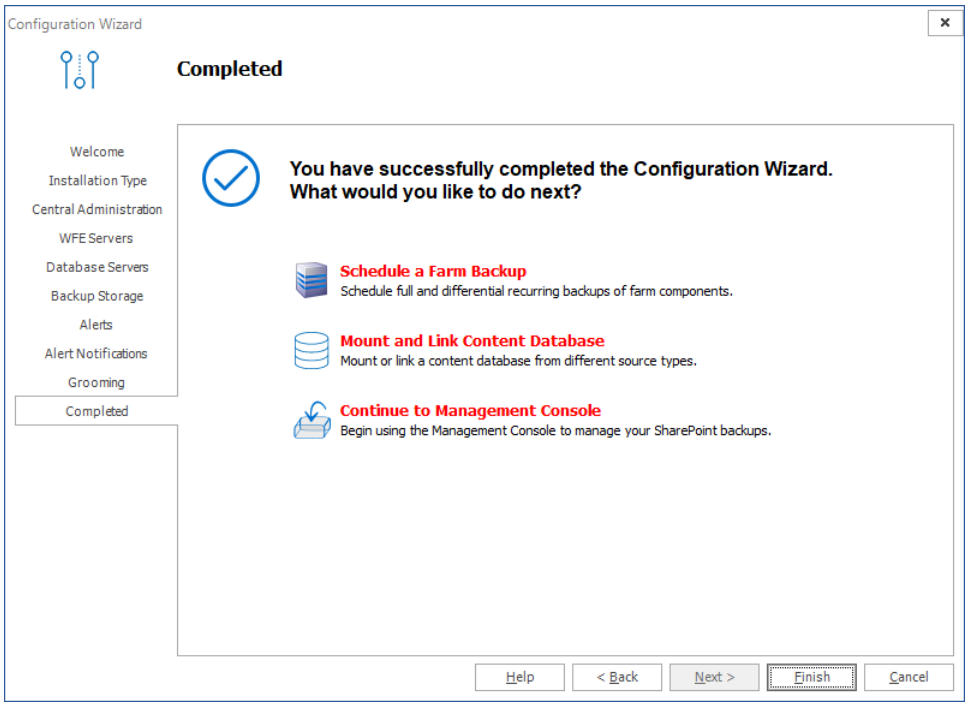
For more information about the backup set grooming options, see Learning about data grooming.

For more information about the alert grooming options, see Configuring alert grooming.

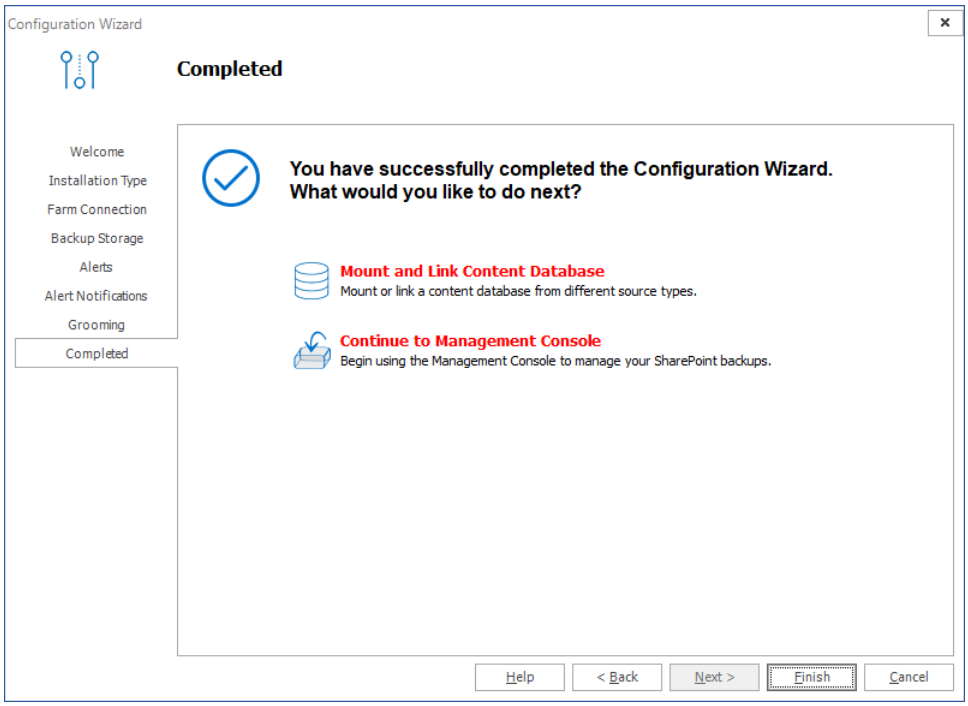
Completing the Configuration Wizard

The Completed tab displays the result of your installation choice.

Grooming window for Installation Type = **Complete**

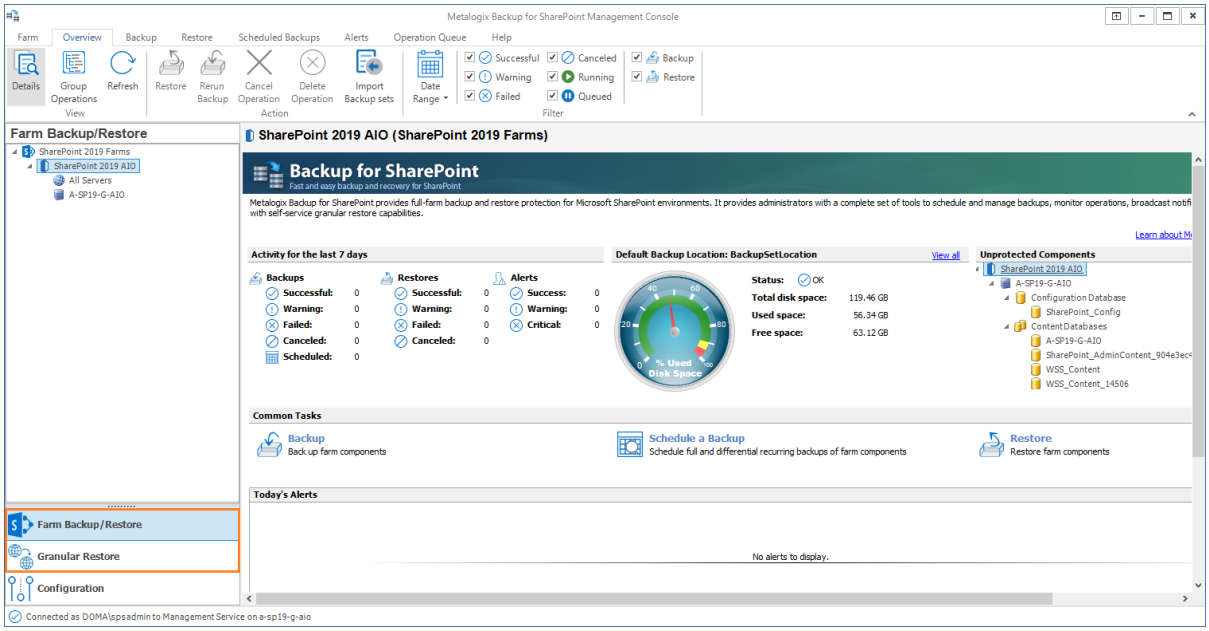


Grooming window for Installation Type = **Granular**

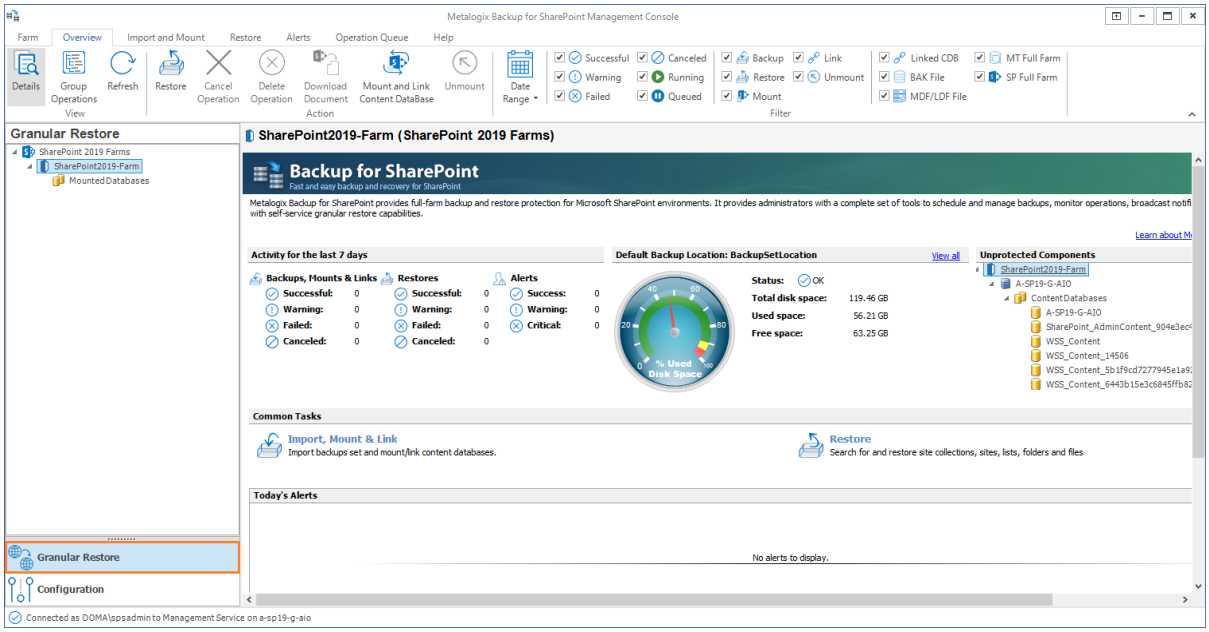


Click **Finish** to complete setting up your farm.

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



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



Managing farms

Use Metalogix Backup for SharePoint to back up your SharePoint 2013, 2016, 2019 and Subscription Edition farms and objects in your SharePoint 2013, 2016, 2019 and Subscription Edition farms.

The Management Console can connect to and back up multiple SharePoint farms. The farms can be a mixture of SharePoint 2013, 2016, 2019 and Subscription Edition farms. You must add any farm that you want to back up to the Management Console. You can also remove farms that are no longer needed.

See the following topics for more information:

- Monitoring multiple farms
- Adding a farm
- Editing a farm
- Removing a farm

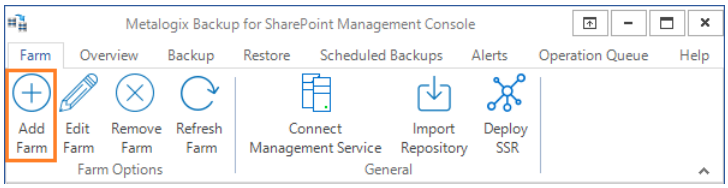
Adding a farm

You can add any SharePoint farm to the Management Console. You must add a farm to back up the farm or the SharePoint objects that it contains. When a farm is added, the farm is registered in the Repository database.

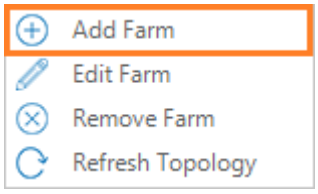
When you add a farm, you supply credentials to connect to the Management Service for the farm. If the farm has one or more installed Backup Service instances, you also connect to the Backup Service. If the farm does not have an installed Backup Service, you can use the Configuration wizard to install one or more Backup Service instances. For more information about using the Configuration wizard, see Discovering SharePoint Servers and defining preferences.

Steps to add a farm

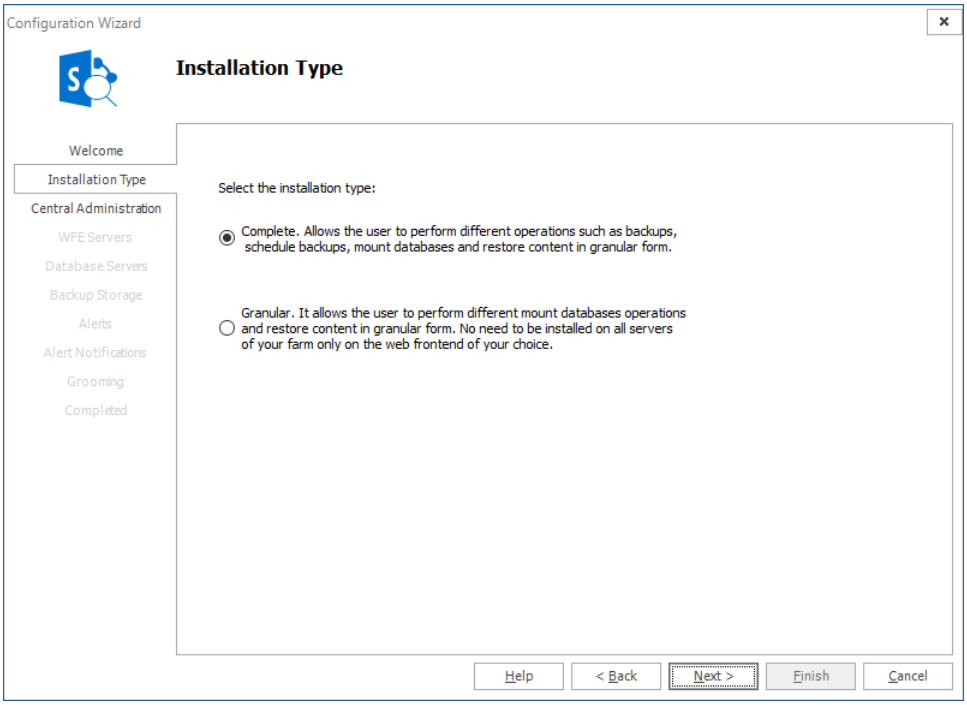
1. From the Management Console toolbar click **Farm** > **Add Farm**. The Configuration Wizard opens.



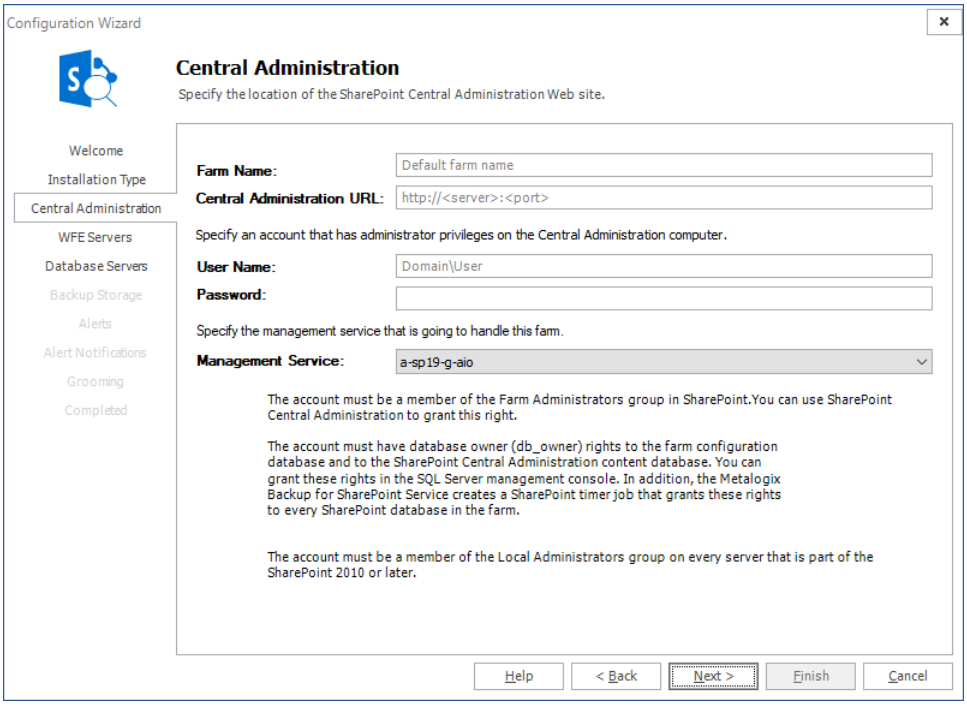
   or select the root node from the SharePoint farms pane. Then right-click and select **Add Farm** from the context menu.



2. Click **Next.** Select the Installation Type.



3. Click **Next**. If you selected the **Complete** option, the Central Administration window appears.



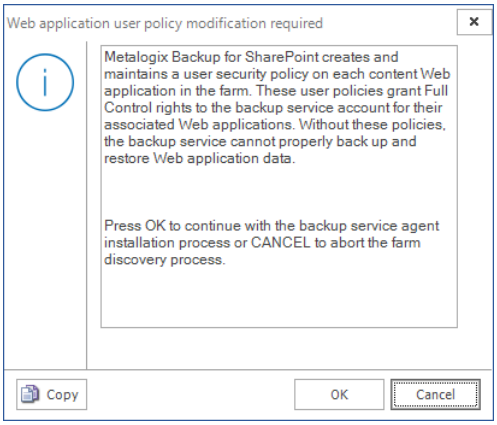
a. In the Central Administration page of the Configuration wizard, give your farm a name.

b. Enter the URL of the Central Administration site for the SharePoint farm in the Central Administration URL field.

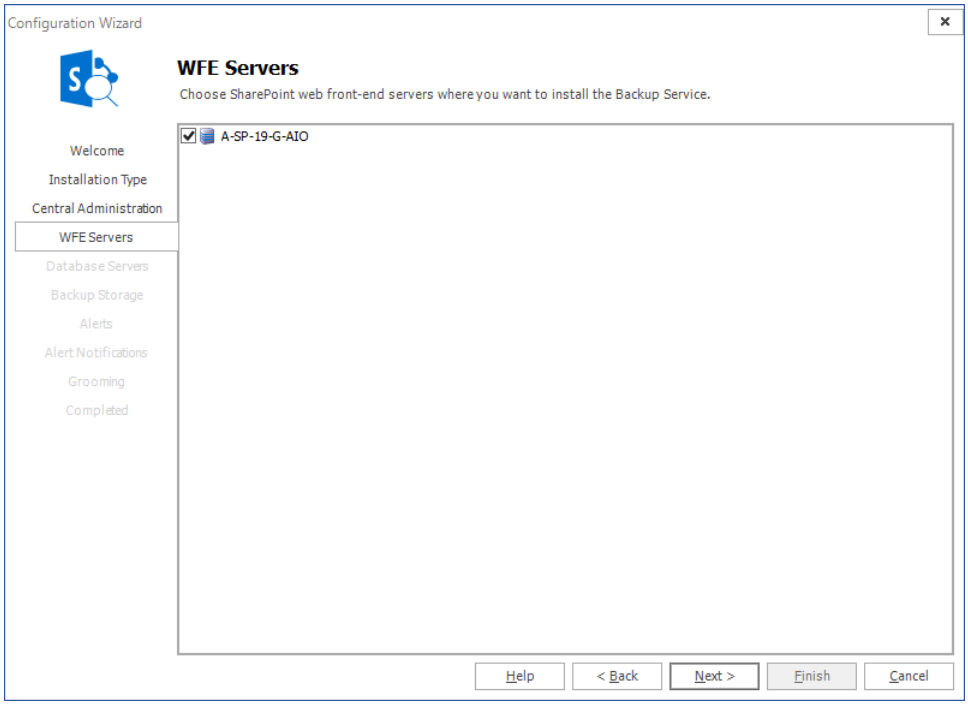
c. Type the name and password of the account that Metalogix Backup for SharePoint should use to connect to the Management Service for the farm in the **User Name** and **Password** fields.

d. Select the Management Service that will manage the farm that will be added. Click **Next**.

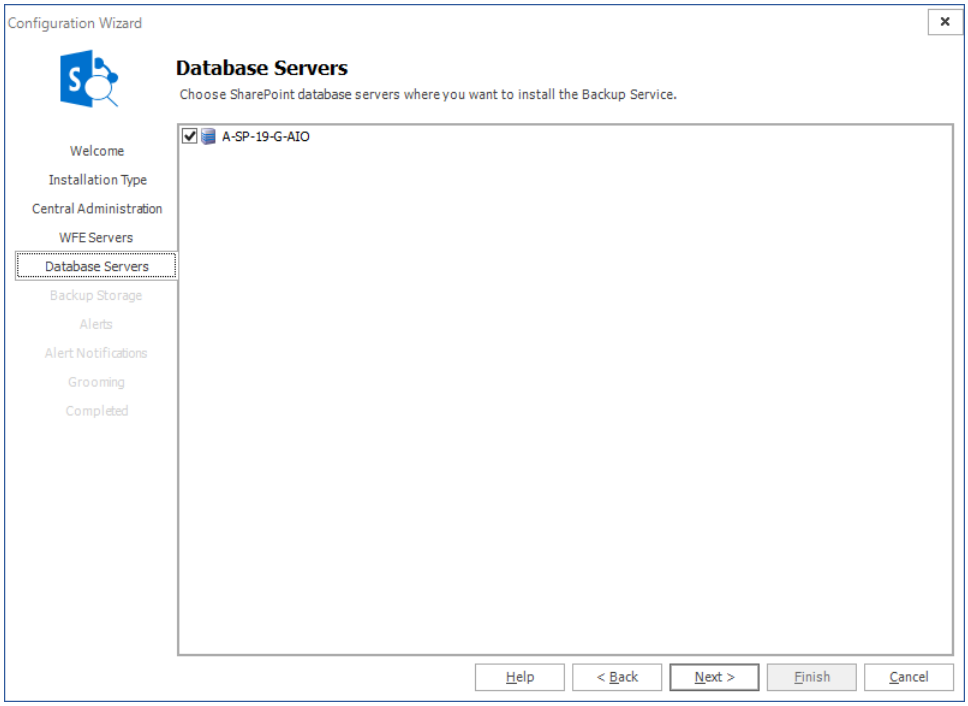
e. In the **Web application user policy modification required** window, click **OK**.



4. Click **Next**. The WFE Servers window appears. Choose the web front-end server(s) where you would like to install the Backup Service.

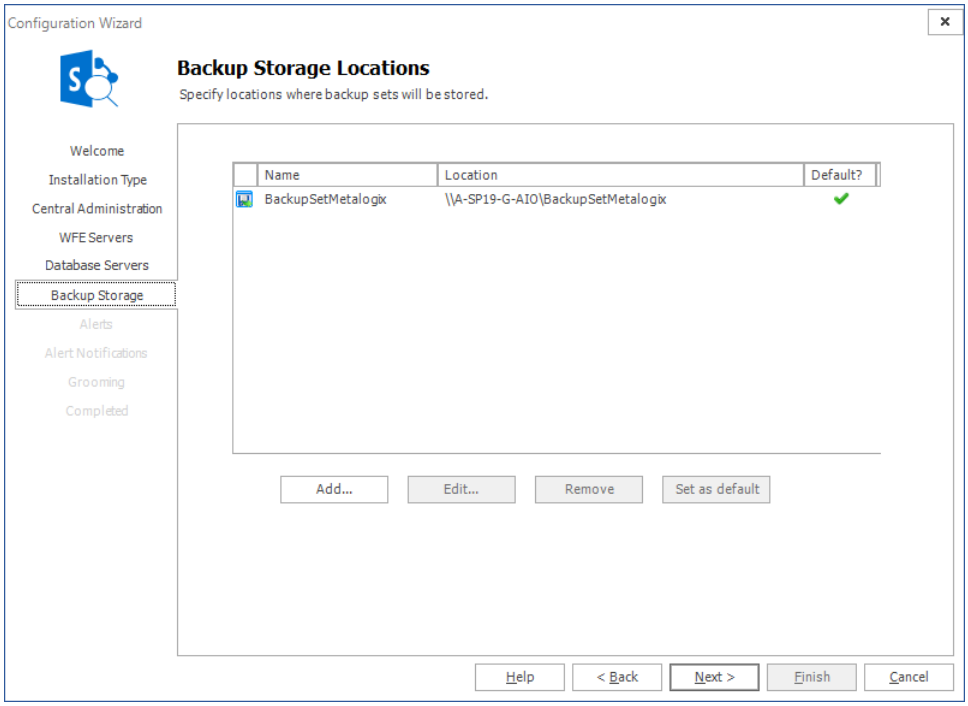


5. Click **Next**. In the Database Servers window, choose the database server(s) where you would like to install the Backup Service.

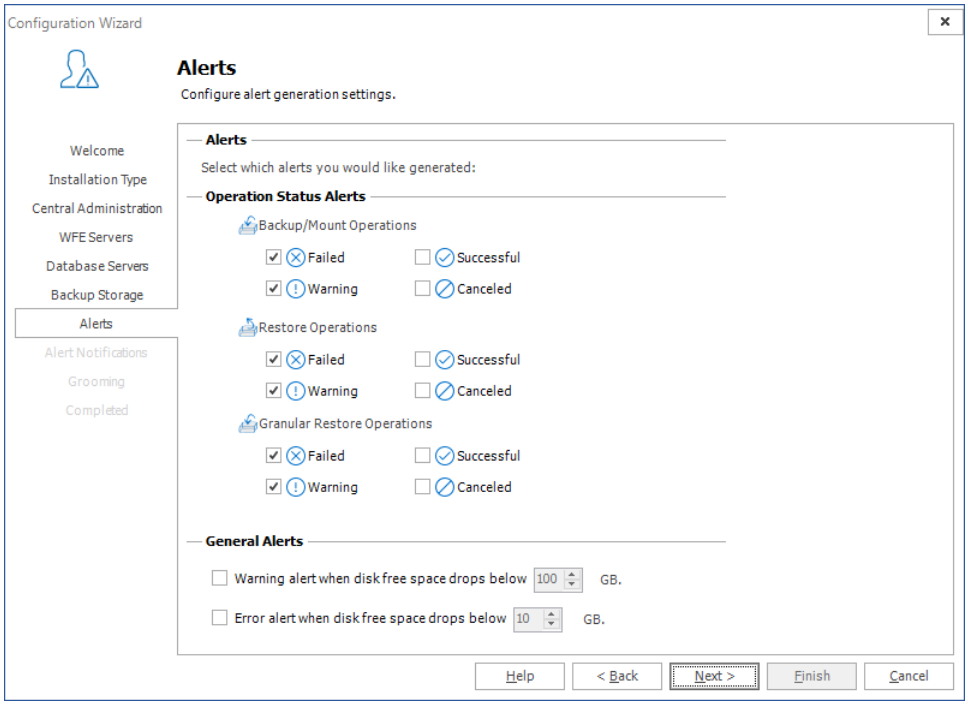


> **NOTE:** This step may not be required if the SharePoint server is also functioning as the web front-end server, or the WFE and SQL servers..

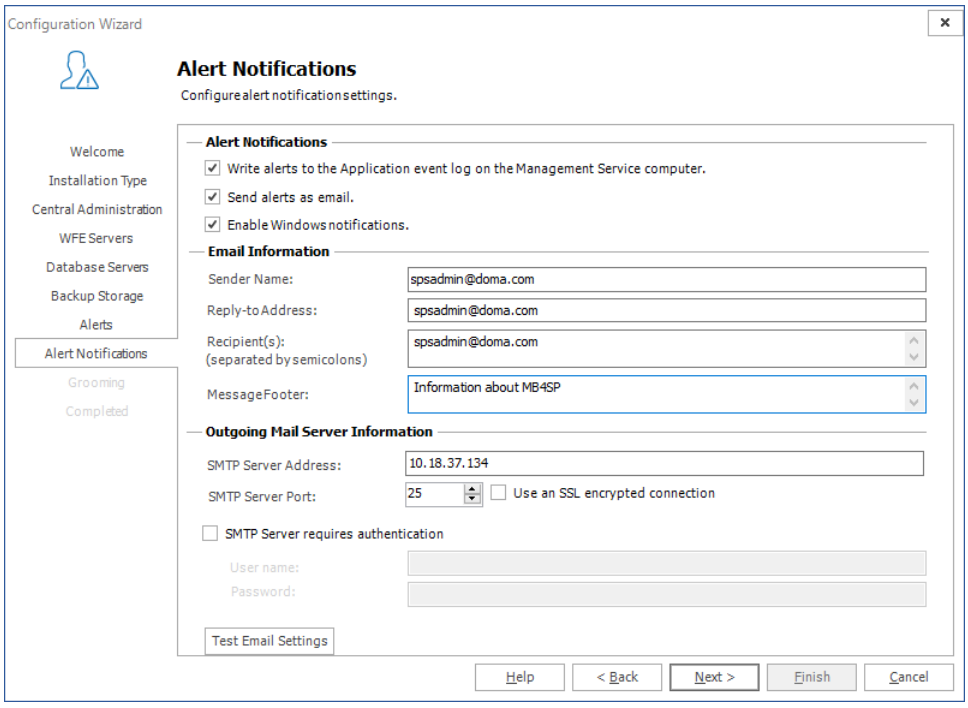
6. Click **Next**. On the Backup Storage page, set up your Backup Service preferences. Refer to "Specifying Backup Storage Locations" for more information. Click **Next**.



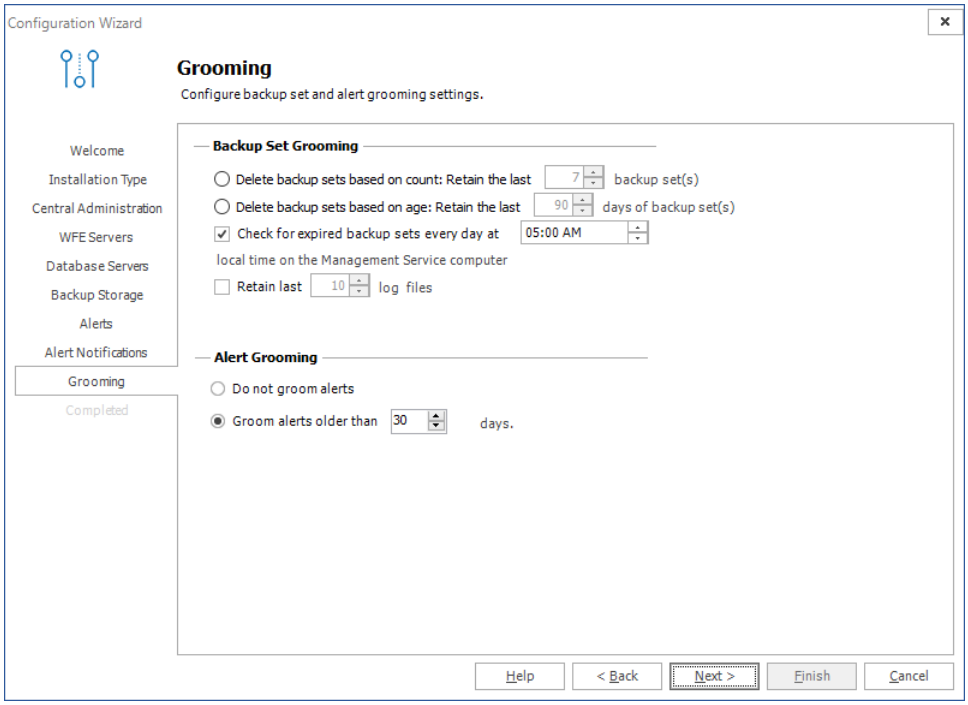
7. On the Alerts page, configure your Alert generation settings. Click **Next**.



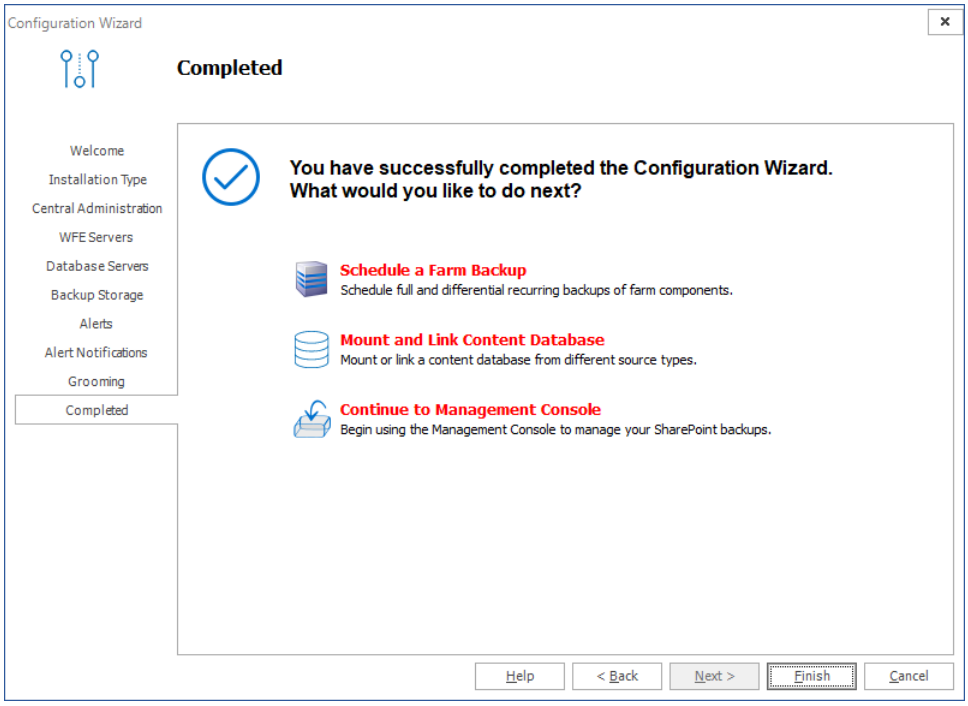
8. On the Alert Notifications page, configure your Alert Notifications. Click **Next**.



9. On the Grooming page, configure the Backup set and Alert grooming settings. Click **Next**.

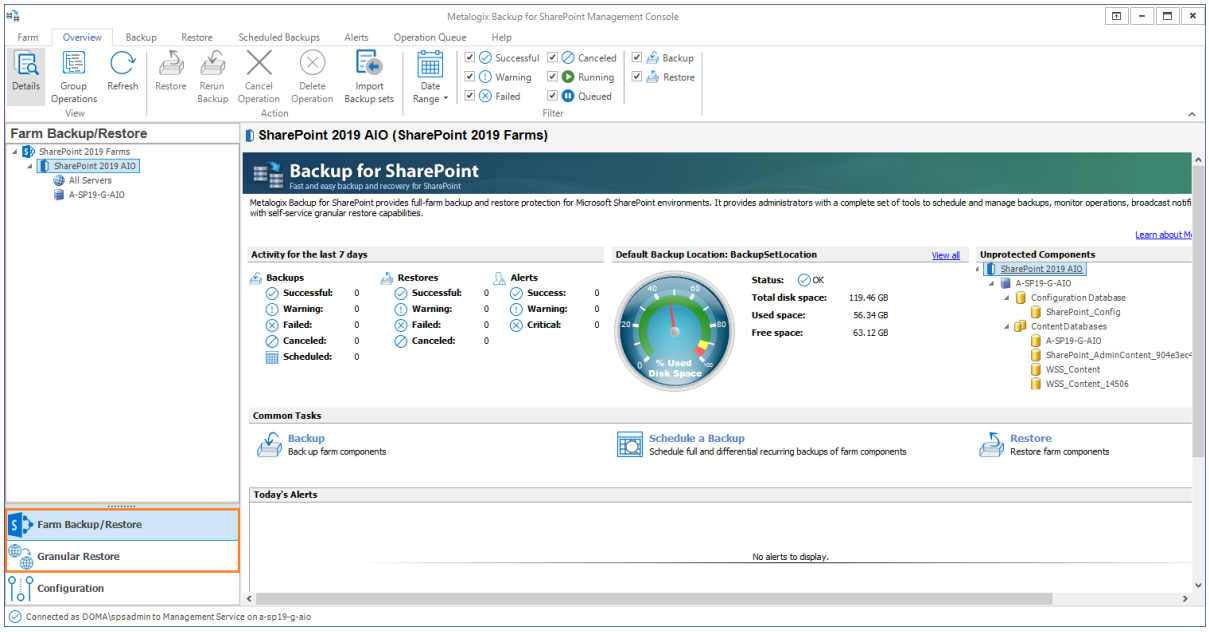


10. Click **Next**. The Completed window appears.

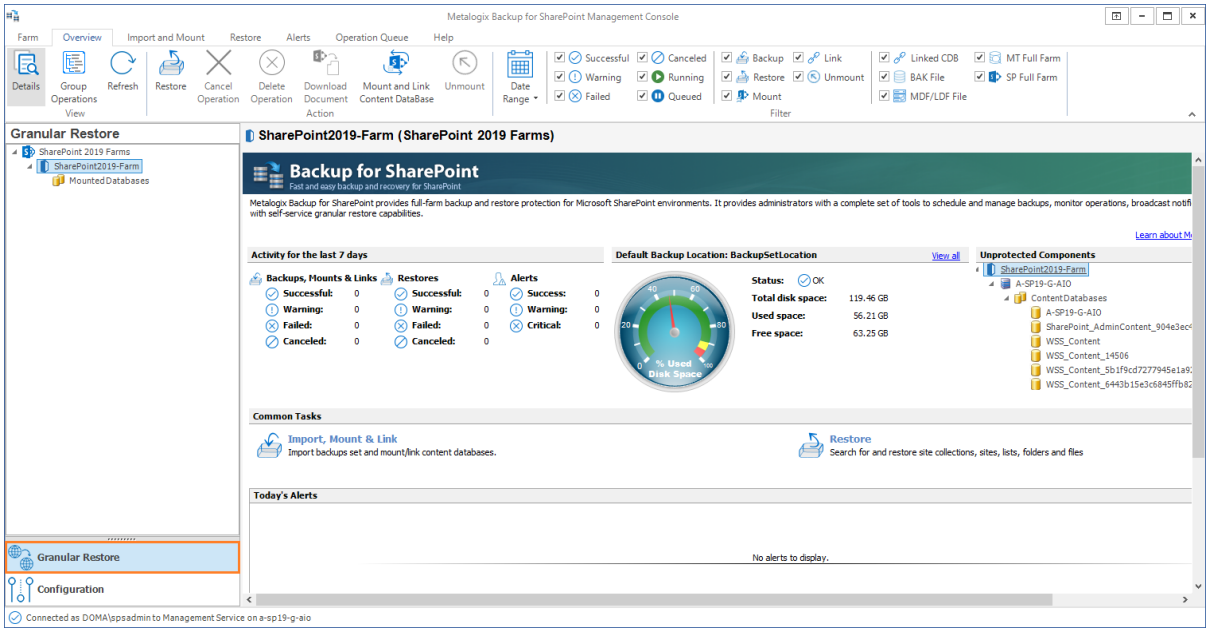


11. Click **Finish** to complete setting up your farm.

If you successfully added a farm with the **Complete** option the Backup/Restore and the Granular operations are enabled.



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

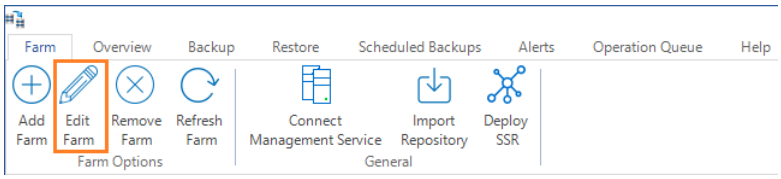


Editing a farm

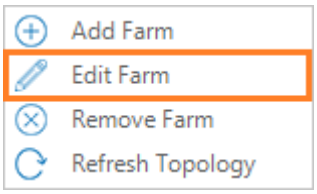
You can make changes to any SharePoint farm that you have added to the Management Console. You can change the name of the farm, the computer that hosts the Management Service, or the credentials that you use to connect to the farm.

Steps to edit a farm

Option 1: From the Management Console toolbar click **Farm** > **Edit Farm**.



Option 2: or select the root node from the SharePoint farms pane. Then right-click and select **Edit Farm** from the context menu.



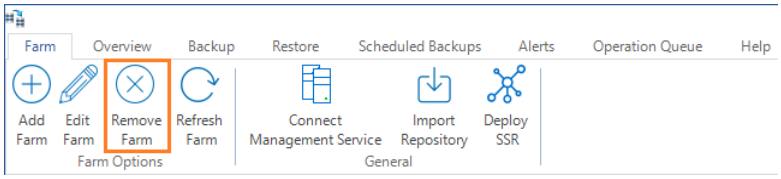
The Configuration Wizard opens. Complete the Configuration Wizard to edit the farm settings and click **Finish** to complete editing your farm.

Removing a farm

You can delete any unused SharePoint farm from the Management Console. You cannot back up from or restore to a farm after you remove it.

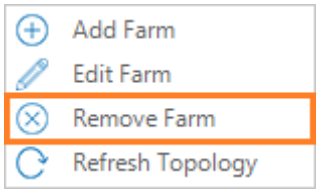
Steps to remove a farm

Option 1: From the Management Console toolbar click **Farm** > **Remove Farm**.



In the Warning window, click **Yes** to remove the farm.

Option 2: From the SharePoint Farms pane, right-click and select **Refresh Topology** from the context menu.



Monitoring farms

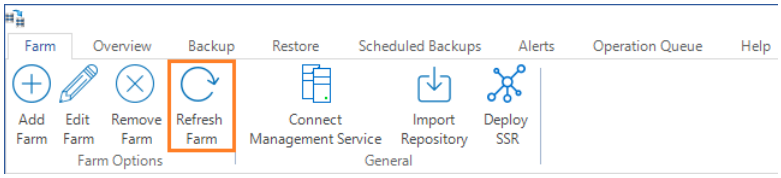
You can use the Management Console to monitor multiple farms. Every farm that is monitored must have a Management Service, and the farms must be in the same domain or must be in a trusted domain. If your disaster recovery planning includes farm backups of SharePoint 2013, 2016, 2019 or Subscription Edition farms, every Web front end (WFE) and every database server in the farm must have the Backup Service installed.

Farms that are added to the Management Console are displayed in the **Farm Backup/Restore** pane. However, SharePoint Farms may be added or removed by SharePoint administrators without the knowledge of the Management Console, or connection problems between the server that hosts the Management Console and a SharePoint Farm server may impact backup or restore operations with the farm.

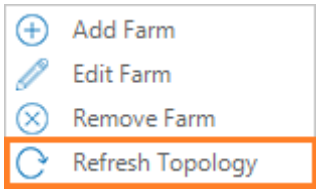
You should refresh the **Farm Backup/Restore** pane often using **Refresh Topology**, to ensure that Management Console can monitor the farms.

Steps to refresh the farms

Option 1:From the Management Console, click **File** > **Refresh Topology**.



Option 2: From the SharePoint Farms pane, right-click and select **Refresh Topology** from the context menu.

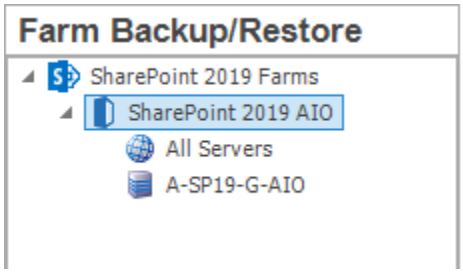


How does Refresh Topology help monitor farms?

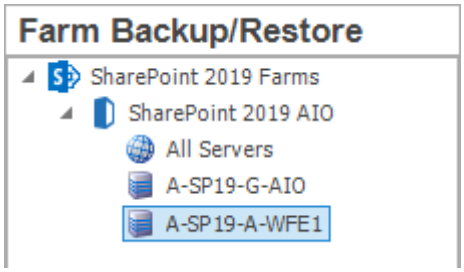
When you click Refresh Topology from the menu or the toolbar, the Management Console verifies the status of each farm that was added or removed. The examples described below will better explain how Refresh Topology helps monitor farms.

Example 1

In this example, a SharePoint farm A-SP19-A-WFE1 was added to the Management Console, but does not appear in the **Farm Backup/Restore** pane.

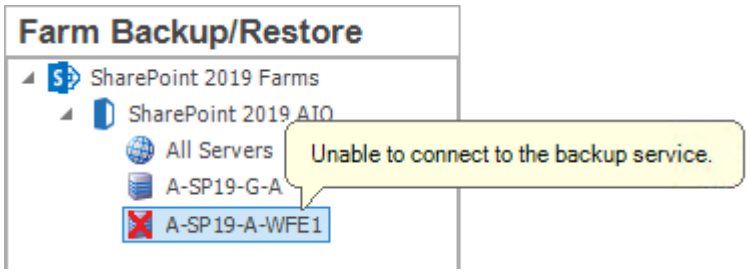


After clicking **Refresh Topology** from the menu or the toolbar, if the Management Console can successfully re-establish a connection with the related Management Service, the SharePoint farm A-SP19-A-WFE1 appears in the **Farm Backup/Restore** pane.

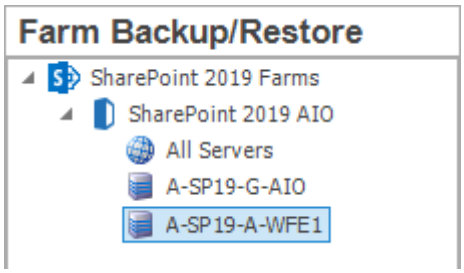


Example 2

In this example, a SharePoint farm A-SP19-A-WFE1 presents a connectivity problem.

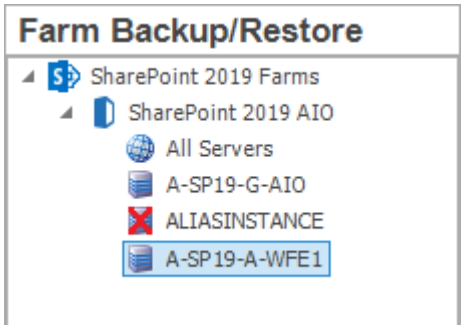


After clicking **Refresh Topology** from the menu or the toolbar, if the Management Console can successfully re-establish the connection, then the SharePoint farm A-SP19-A-WFE1 is restored to normalcy in the **Farm Backup/Restore** pane.

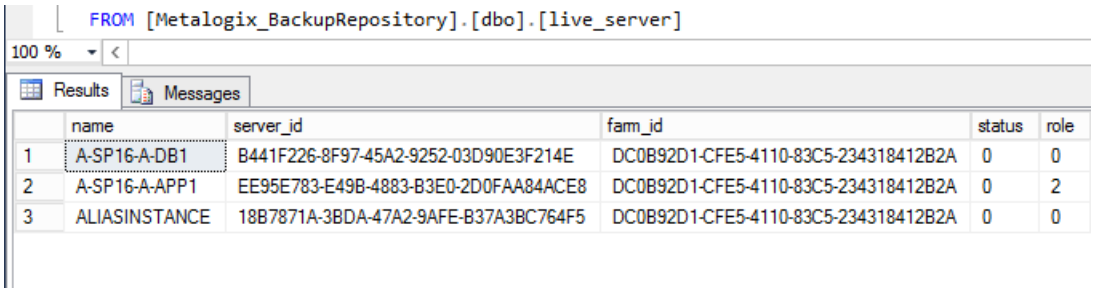


Example 3

In this example, the SharePoint farm ALIASINSTANCE has been removed.



Even thought the farm is removed, the farm details may persist in the Metalogix Backup for SharePoint Repository as shown below.



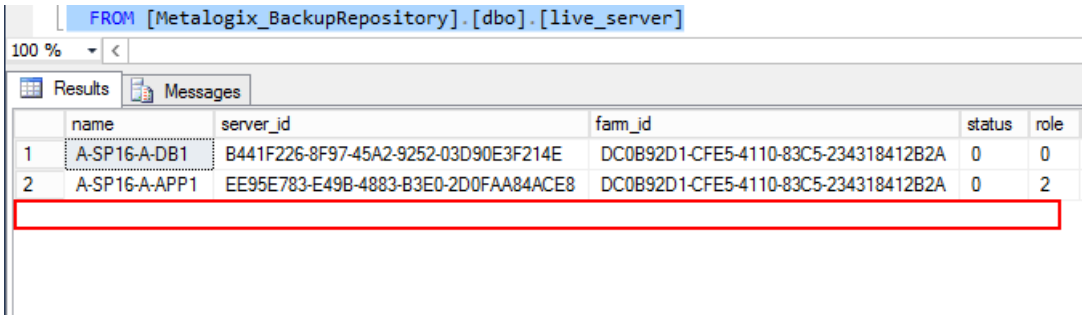
```
FROM [Metalogix_BackupRepository].[dbo].[live_server]
```

100 %

Results | Messages

	name	server_id	farm_id	status	role
1	A-SP16-A-DB1	B441F226-8F97-45A2-9252-03D90E3F214E	DC0B92D1-CFE5-4110-83C5-234318412B2A	0	0
2	A-SP16-A-APP1	EE95E783-E49B-4883-B3E0-2D0FAA84ACE8	DC0B92D1-CFE5-4110-83C5-234318412B2A	0	2
3	ALIASINSTANCE	18B7871A-3BDA-47A2-9AFE-B37A3BC764F5	DC0B92D1-CFE5-4110-83C5-234318412B2A	0	0

After clicking **Refresh Topology** from the menu or the toolbar, the farm information is deleted from the Metalogix Backup for SharePoint Repository.



```
FROM [Metalogix_BackupRepository].[dbo].[live_server]
```

100 %

Results | Messages

	name	server_id	farm_id	status	role
1	A-SP16-A-DB1	B441F226-8F97-45A2-9252-03D90E3F214E	DC0B92D1-CFE5-4110-83C5-234318412B2A	0	0
2	A-SP16-A-APP1	EE95E783-E49B-4883-B3E0-2D0FAA84ACE8	DC0B92D1-CFE5-4110-83C5-234318412B2A	0	2

Managing the Backup Service

The Backup Service performs backup and restore operations when directed to do so by the Management Service. The following sections describe tasks you may need to manage a Backup Service:

- Installing the Backup Service manually
- Starting the Backup Service
- Stopping the Backup Service

Starting the Backup Service

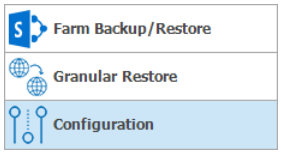
The Start Backup Service action lets you start a stopped Backup Service on the selected Web front end (WFE) server or database server. The Backup Service must already be installed on the server.

How do I start a Backup Service?

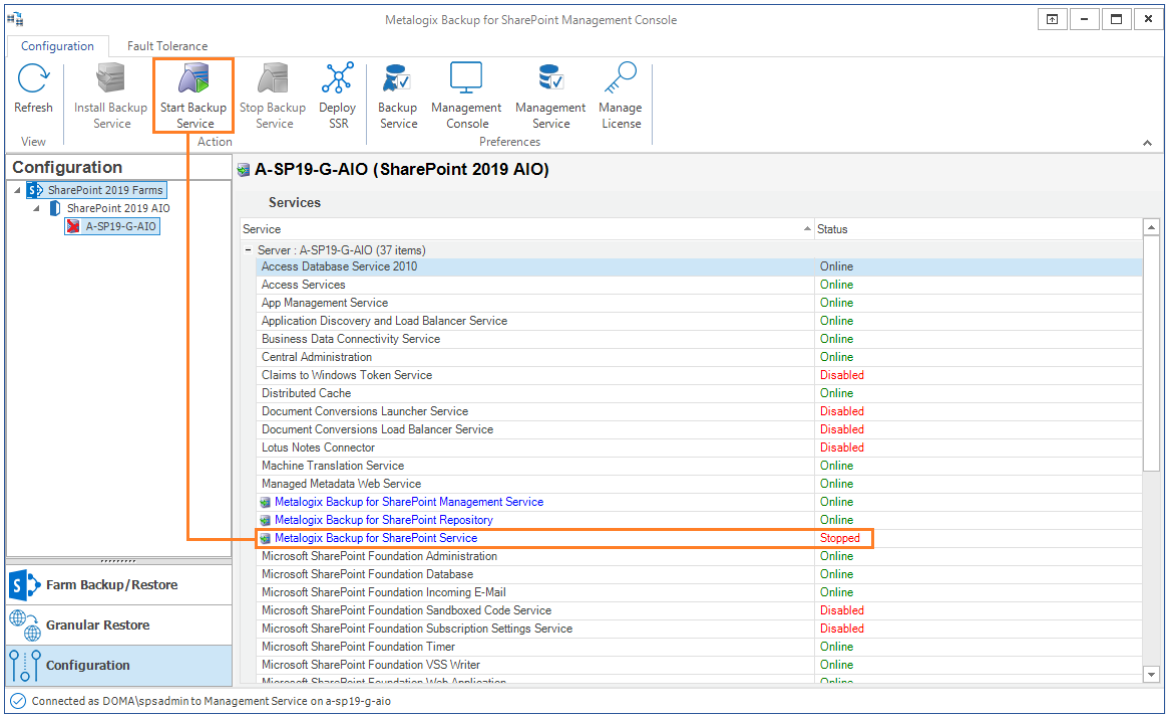
You use the Start Backup Service action to start a stopped Backup Service.

To start a stopped Backup Service

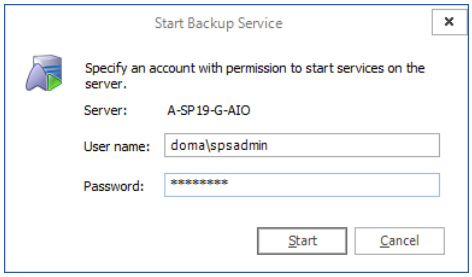
1. From the Management Console workspace selector click **Configuration**.



2. In the **Configuration** pane click the server where you want to start the Backup Service.
3. In the ribbon of the **Configuration** tab click **Start Backup Service**.



4. In the **Start Backup Service** window, enter the user name and password to use to start the service and click **Start**.



5. In the confirmation window, click **OK**.
6. In the ribbon of the **Configuration** tab click **Refresh** to verify the status of the Backup Service.

What permissions does the account that you use to start the Backup Service require?

The account that you specify when you start the Backup Service 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.

Stopping the Backup Service

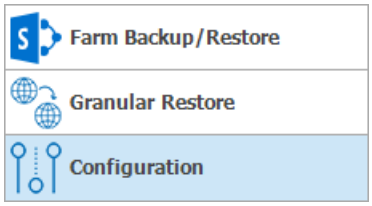
The Stop Backup Service action lets you stop a running Backup Service on the selected Web front end (WFE) server or database server.

How do I stop a Backup Service?

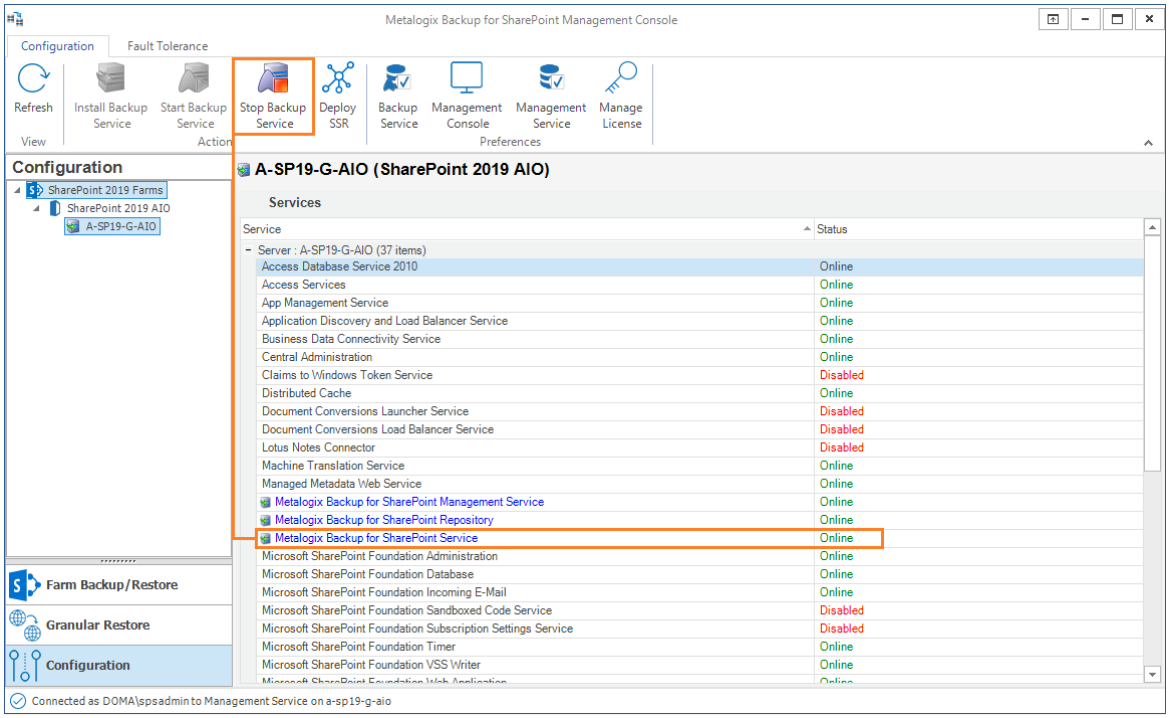
You use the Stop Backup Service action to stop a Backup Service.

To stop a Backup Service

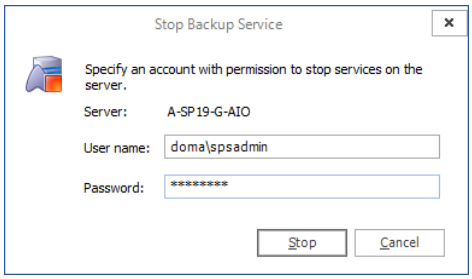
1. From the Management Console workspace selector click **Configuration**.



2. In the **Configuration** pane, click the server where you want to stop the Backup Service.
3. In the ribbon of the **Configuration** tab click **Stop Backup Service**.



4. In the **Stop Backup Service** window, enter the user name and password to use to stop the service and click **Stop**.



5. In the confirmation window click **OK**.
6. In the ribbon of the **Configuration** tab click **Refresh** to verify the status of the Backup Service.

What permissions does the account that you use to stop the Backup Service require?

The account that you specify when you stop the Backup Service needs the following permissions:

- Must be a member of the Share Point farm administrators group.
- Must be a local administrator on the computer that hosts the Backup Service.

Configuring fault tolerance

When you add a farm to the Management Console, you install the Backup Service on the SharePoint servers that make up your SharePoint farm. You can also install the Backup Service on SharePoint servers manually. For more information about installing the Backup Service, see Installing the Backup Service manually.

If the Management Service is unable to contact the primary Backup Service when it performs a backup or restore operation, it can assign the job to a secondary Backup Service installed on a Web front end (WFE) in the same farm.

When the Management Service assigns a job to a Backup Service, it checks Backup Service availability in the same order used for fault tolerance. If the first Backup Service in the fault tolerance list is busy, the Management Service tries the next, and so on until it locates an available Backup Service.

Farm backups are always processed by the Backup Service installed on the server. If all of the Backup Service instances are busy, the Management Service waits for the first available Backup Service. For more information about load balancing, see Understanding load balancing.

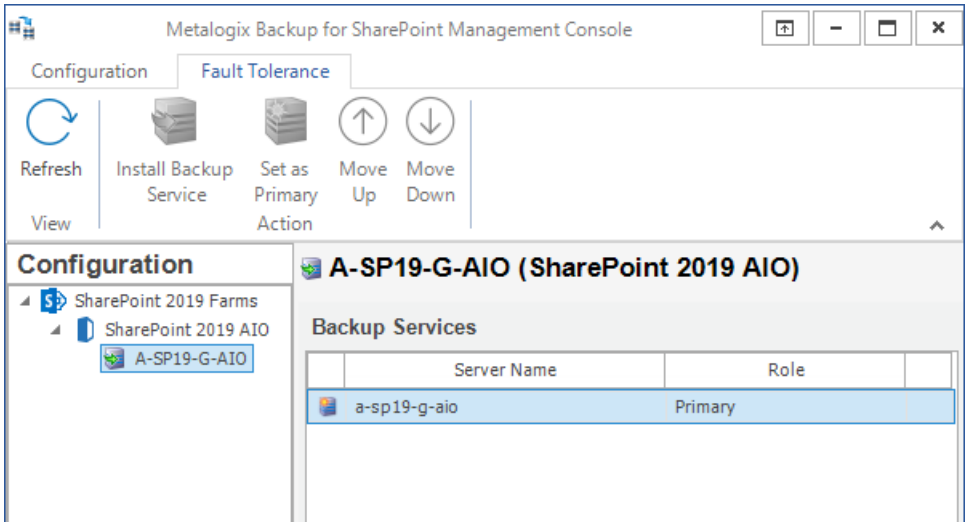
How can I select the failover order for the Backup Service instances installed on a single SharePoint farm?

You use the Configuration pane in the Management Console to control the failover order for the Backup Service instances installed on the WFEs in a single SharePoint farm.

To change the failover order for a farm

1. From the Management Console workspace selector click **Configuration**.
2. In the *Configuration* pane, do one of the following:
   - Click the name of the farm whose fault tolerance settings you want to change.
   - Click the name of a server in the farm whose fault tolerance settings you want to change.
   - Click the SharePoint version you want to use, and then click the name of the farm whose fault tolerance settings you want to change.

3. In the right pane, in the ribbon, click **Fault Tolerance**.



4. In the Backup Services list, review the failover order for the Backup Service instances if there are more instances.
5. Click a Backup Service, then click **Move Up** or **Move Down** to change the failover order.
6. Click **Set as Primary** to designate that Backup Service as the primary service for the farm. When you set a service as primary, it moves to the first place in the list of Backup Service instances.

Managing preferences

You can customize Metalogix Backup for SharePoint to meet the needs of your environment. Use the Preferences window to perform the following tasks:

- Defining the Backup Service preferences
- Defining the preferences
- Defining the Management Console preferences
- Understanding load balancing

Defining the Backup Service preferences

You can configure the preferences for the Backup Service. You can specify the location on your network where Metalogix Backup for SharePoint stores backup sets. You can also configure the service account that the Backup Service uses.

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. You must set up a TSM virtual server client node before you can back up to a TSM client node. For more information about using TSM with Metalogix Backup for SharePoint, see Learning about Tivoli Storage Manager.

If you make changes to the default backup set storage location, future backup operations use the new location. Any existing backup sets remain in the original location. When you perform restore

operations, you can access both the existing backup sets in the original location and the new backup sets. You can specify a location other than the default for each backup set.

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

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

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

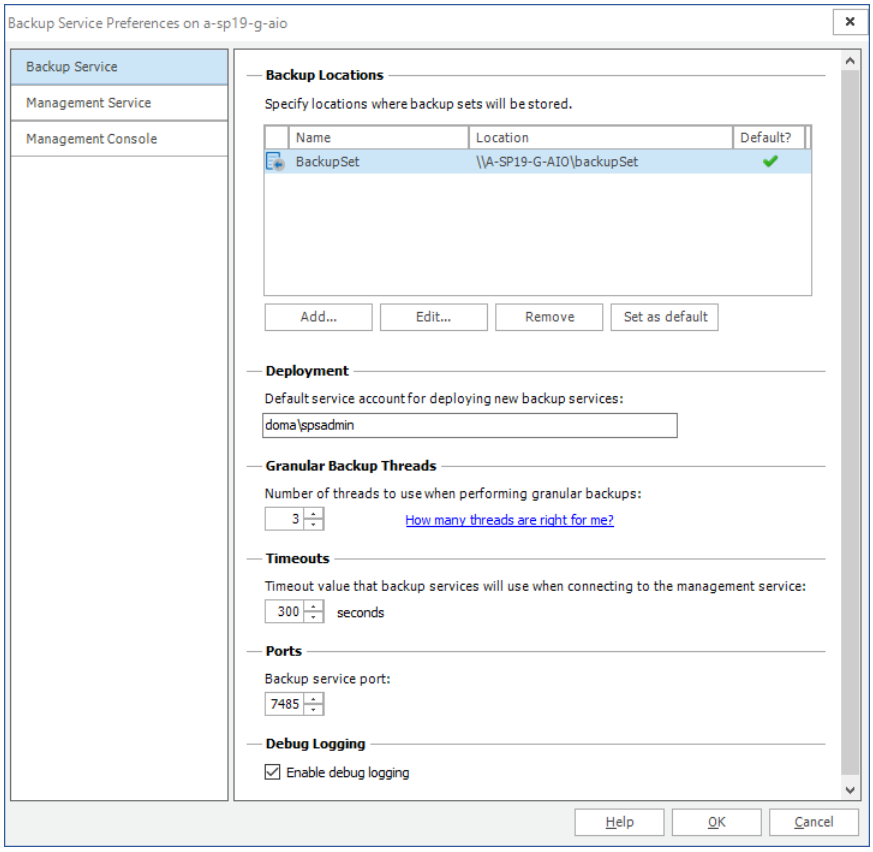
How do I configure the Backup Service preferences?

You use the Management Console to configure the Backup Service preferences.

To view the Backup Service preferences:

1. From the Management Console workspace selector click **Configuration**.
2. Select the farm for which you want to set the Backup Service preferences.
3. From the **Configuration** tab, click **Backup Service**.

4. In the Backup Service Preferences window, review and set your preferences.

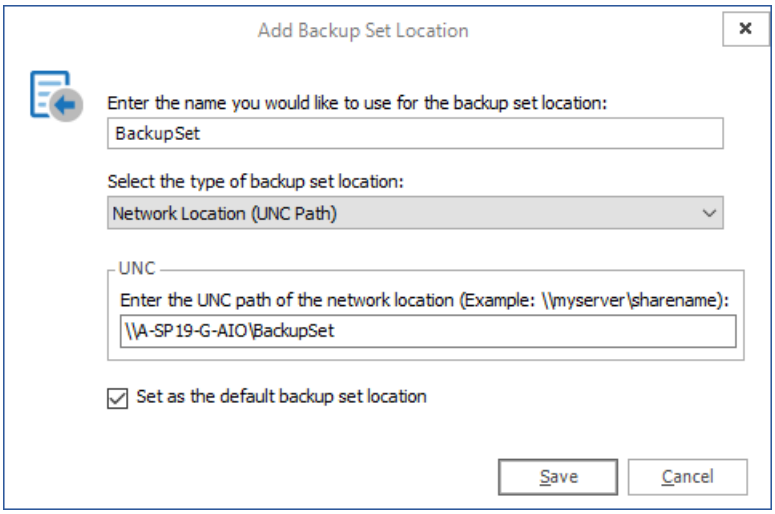


5. Click **OK** to close the window.

To add a new backup location:

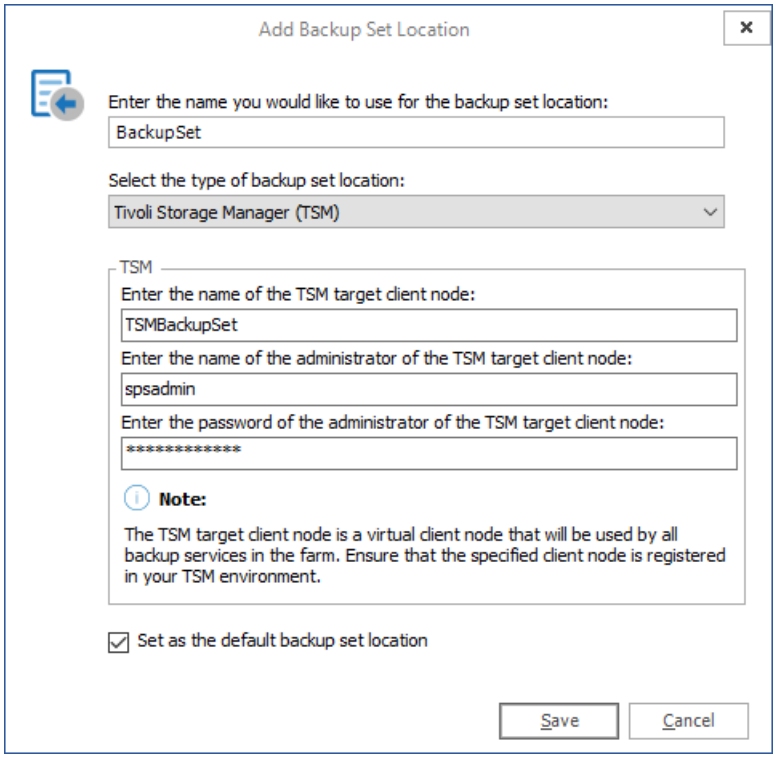
1. In the Backup Service Preferences window, click **Add**. The Add Backup Set Location window opens.
2. Enter the name for the backup set location.
3. Select from one of following options for the backup set location type and configure the specifications:

    a. **Network Location (UNC Path)**



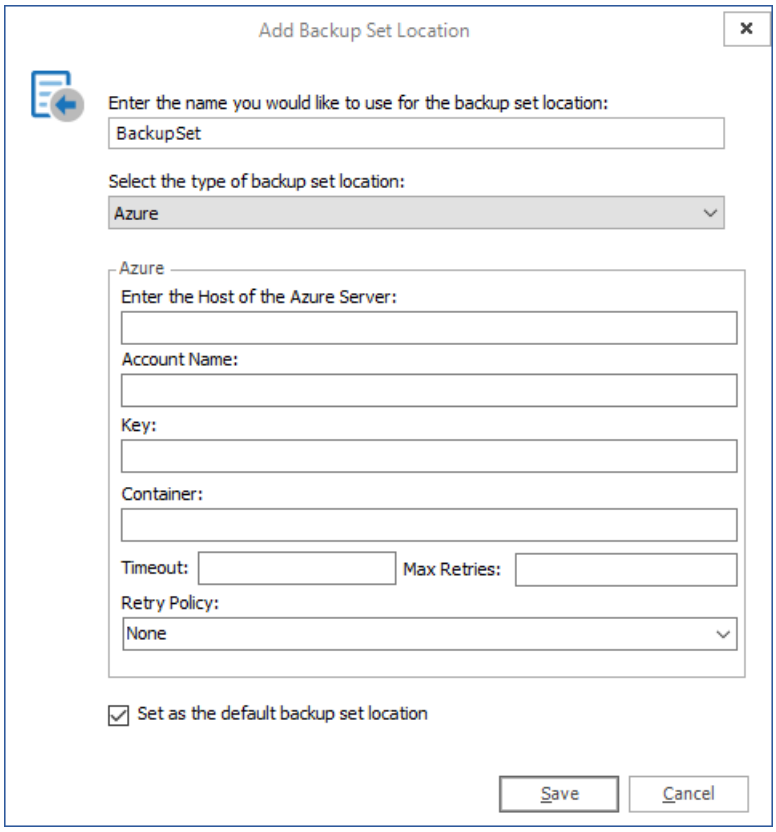
In the UNC field, type the UNC path of the location in the **Enter the UNC path of the network location** field.

b. **Tivoli Storage Manager (TSM)** virtual client node

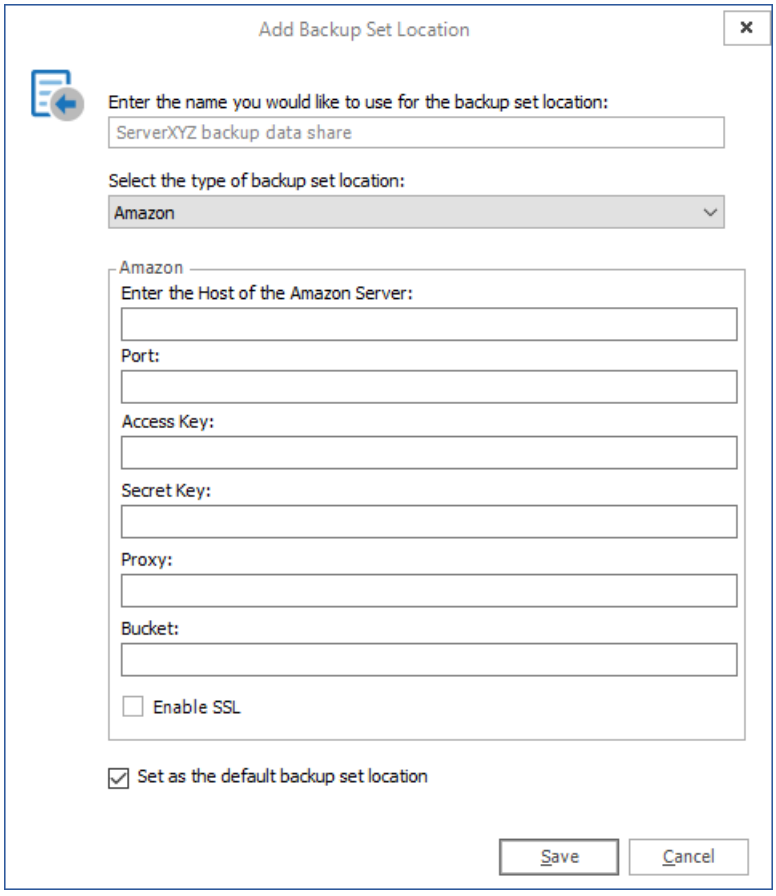


Enter the node name, administrator user name and password as required.

c. **Azure**

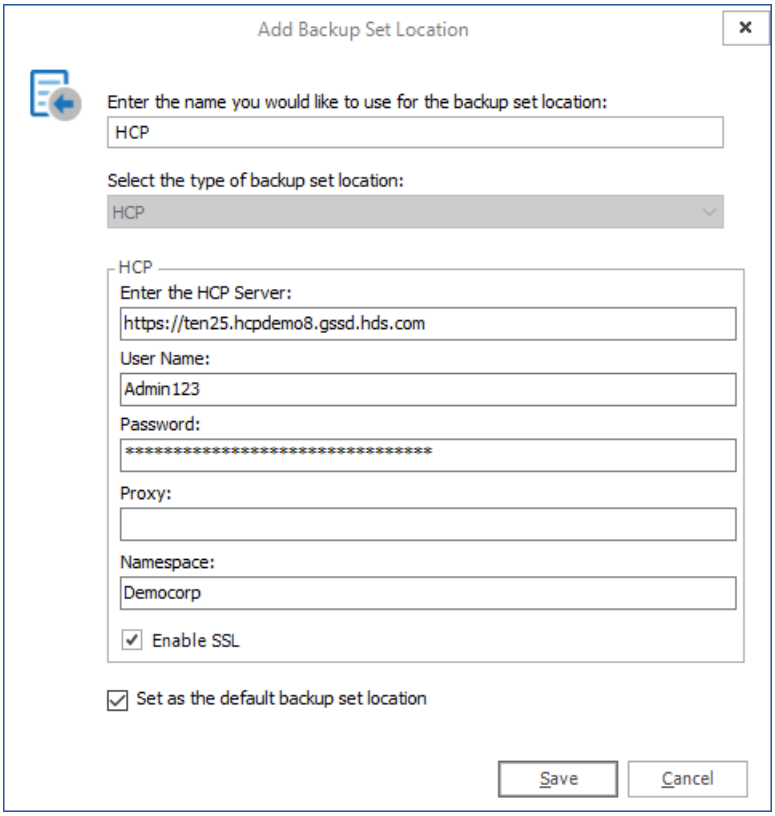


d. **Amazon**



The **Access Key** and **Secret Key** are tokens that are used to sign and secure programmatic access to Amazon Web Services (AWS) when you create an account with AWS.

e. **Hitachi Content Platform (HCP)**



If users access a namespace browser for local authentication with the **User Name** and **Password**, you must specify a **Namespace.** The namespace is accessed by RESTful API with an authentication token that is calculated as follows: `base64(username):md5(password)`

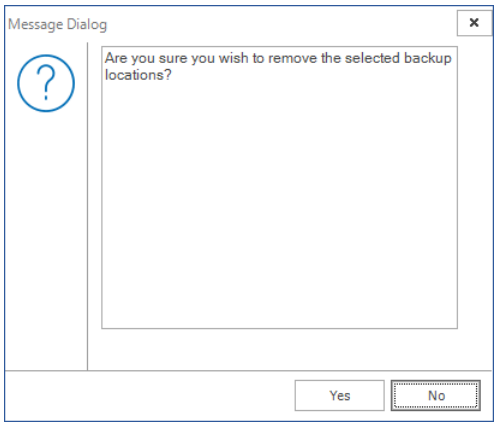
HTTPS is required to protect the token from packet sniffing attacks.

2. To set the new location as the default location, select the **Set the default backup set location** check box.
3. Click **OK**.

NOTE: Managed locations with the same path or URI are not allowed.

To delete a backup location:

1. In the Backup Service Preferences window, click the backup location that you want to remove. Click **Remove**.
2. Metalogix Backup for SharePoint prompts you to confirm that you want to remove the backup location. Click **Yes**.



3. Click **OK**.

To set a backup location as the default:

1. In the Backup Service Preferences window, click the backup location to set as the default. Click **Set as default**.
2. Click **OK**.

To specify a new default service account for any new Backup Service that you install:

1. In the Backup Service Preferences window, in the **Deployment** area, enter the new default service account name for the new Backup Service instances.
2. Click **OK**.

To set the number of threads used when performing Granular Backups:

1. In the Backup Service Preferences window, in the Granular Backup Threads area, enter the number of threads you would like to use when performing Granular Backups. You can type the number, or use the up and down buttons in the Threads field to select a number.
2. Click **OK**.

To set the Backup Service timeout value:

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

2. Click **OK**.

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

1. In the Backup Service Preferences window, in the Ports area, enter the port that the Management Service uses to communicate with the Backup Service. You can type the number in the field or use the up and down buttons in the threads field to change the number.
2. Click **OK**.

To configure debug logging:

1. In the Backup Service Preferences window, in the Debug logging area, select or clear the **Enable debug logging** check box.
2. Click **OK**.

What permissions does the Backup Service require?

The service account that you specify for the Backup Service must have the following permissions:

- Must be a local administrator on the SharePoint Web front end (WFE) that hosts the Backup Service.
- Must be a member of the SharePoint farm administrators group.
- Must have db_owner access to all SharePoint content databases, including the Admin Content and SharePoint Config databases.

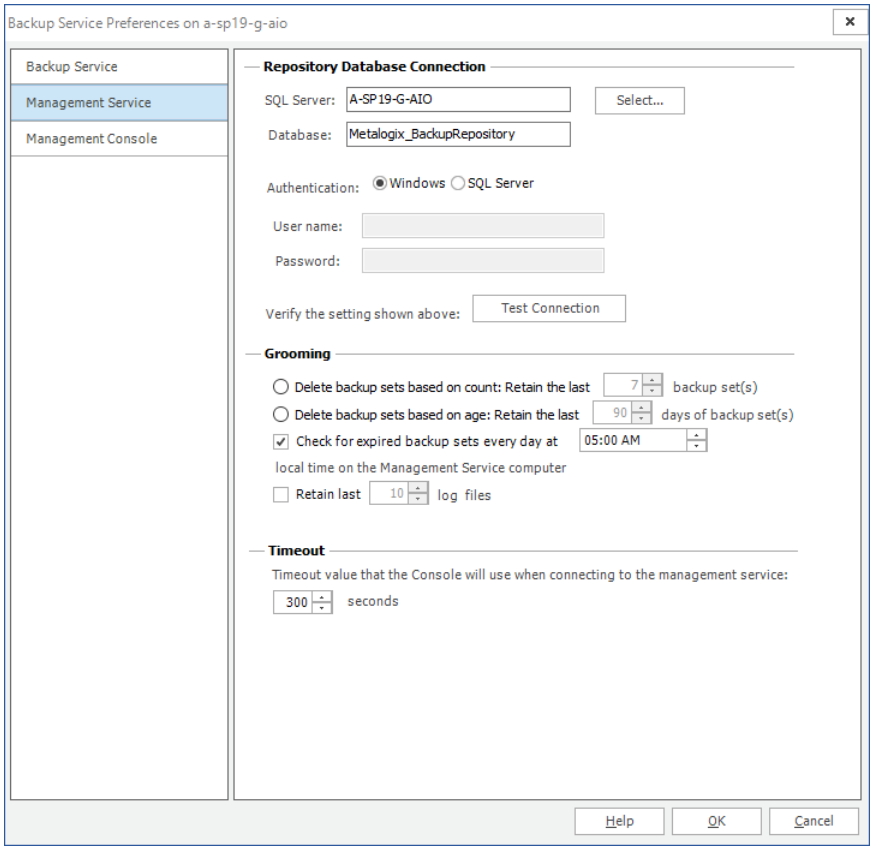
Defining the Management Service preferences

You can configure the preferences for the Management Service including specifying the SQL Server that Metalogix Backup for SharePoint uses for the repository database. You can also configure the data grooming options for the farm.

The Management Service uses the repository database to store configuration information and backup set identification data. You can set the Management Service preferences separately for each farm that you back up.

What Management Service preferences can I set?

You can set the following preferences for the Management Service:



Repository Database Connection

SQL Server - hosts the Metalogix Backup for SharePoint repository database.

Database - The specific database on the SQL Server that contains the Metalogix Backup for SharePoint repository database. The default database name is Metalogix_BackupRepository.

Authentication - The type of authentication used for the SQL Server. You can use Windows or SQL Server authentication. If you use **Windows authentication**, Metalogix Backup for SharePoint uses the service account that you set for the Management Service to access the SQL Server. If you use **SQL Server authentication**, you must specify a user name and password to use to connect to the SQL Server. Be sure to test the connection once you have entered the user name and password details.

Grooming

Lets you control how Metalogix Backup for SharePoint deletes out-of-date backup sets from the backup location. For more information about data grooming options, see Learning about data grooming.

Metalogix Backup for SharePoint can use Tivoli Storage Manager (TSM) to store backup set content. If you enable data grooming for a backup set that Metalogix Backup for SharePoint stores in TSM, 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 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. For more information about using TSM, see Learning about Tivoli Storage.

Timeout

In the Management Service Preferences window, in the **Timeout** area, enter the length of time in seconds that the Metalogix Backup for SharePoint console should wait for successful communication with the management Service. You can type the number of seconds in the field or use the up and down buttons in the seconds field to change the number of seconds.

How do I set the Management Service preferences?

You use the Management Console to configure the Management Service preferences.

To set the Management Service preferences

1. From the Management Console workspace selector click **Configuration**.
2. Select the farm whose Management Service preferences you want to set
3. From the **Configuration** tab, click **Management Service**.
4. In the Management Service Preferences window, review and set your preferences.
5. If you made changes to the Repository Database Connection settings, click **Test Connection** to verify that the new settings work properly.
6. Click **OK** to close the window and save the changes you made to the Management Service preferences.

What permissions are required for the SQL Server connection and the Management Service?

The account that the Management Service uses to access the SQL Server must have specific privileges granted to it. If you use Windows authentication for the SQL Server, Metalogix Backup for SharePoint uses the service account that you set for the Management Service to access the SQL Server. If you use SQL Server authentication, you specify a user name and password to use to access the server.

The account that you specify must be a member of the db_owner role for the database that you specify for the Metalogix Backup for SharePoint repository database.

In addition, the service account that you specify for the Management Service must have local administrator permissions on the computer that hosts the Management Service.

Defining the Management Console preferences

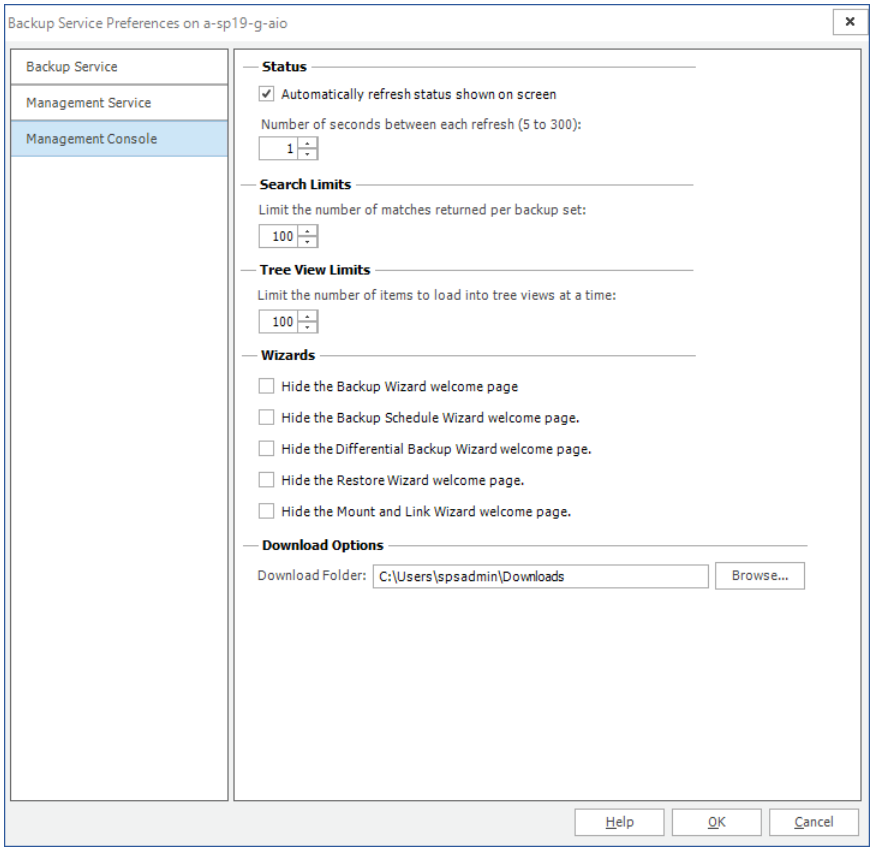
You can configure the preferences for the Management Console independently for each user on each computer that hosts the Management Console.

How do I set the Management Console preferences?

You use the Management Console preferences pane in the preferences window to configure the Management Console preferences. The preferences are specific to each user on each Management Console host.

To set the Management Console preferences

1. From the Management Console workspace selector click **Configuration**.
2. From the **Configuration** tab, click the name of any farm, then click **Management Console**.
3. In the Management Console Preferences window, review and set your preferences.



The preferences that you can set include the following:

a. **Automatically refresh status** - When selected, the Management Console automatically refreshes status information at an interval that you specify.

b. **Number of seconds between refreshes** - The time that the Management Console waits before it refreshes status. This option is not available if you disable automatic refresh.

c. **Search Limits** - When selected and you perform a search in a backup set, the Management Console only displays the number of matches that you specify.

d. **Wizards** - Select each check box to hide or to show the Welcome page in the specified wizard.

e. **Download Options** - Specify the folder where documents can be downloaded for preview when you want to inspect documents before a granular restore.

4. Click **OK** to close the window and save the changes you made to the Management Console preferences.

Understanding load balancing

When you install Metalogix Backup for SharePoint, you normally install the Backup Service instances on multiple Web front end (WFE) servers in your SharePoint farm. When your deployment includes multiple Backup Service instances, the Management Service automatically assigns backup tasks to the next available Backup Service. Using multiple Backup Service instances helps you balance the load that is assigned to each of the servers in your SharePoint farm.

When the Management Service assigns a job to a Backup Service, it checks Backup Service availability in the same order used for fault tolerance. If the first Backup Service in the fault tolerance list is busy, the Management Service tries the next, and so on, until it locates an available Backup Service.

If all of the Backup Service instances are busy, the Management Service waits for the first available Backup Service. You do not need to manage load balancing manually.

For more information about configuring the fault tolerance order, and thus the order that the Management Service uses to assign jobs to Backup Service instances, see Configuring fault tolerance.

Managing alerts

Metalogix Backup for SharePoint can generate an alert when a condition that you specify occurs. When an alert occurs, you can specify that Metalogix Backup for SharePoint does one or more of the following:

- Send an email to one or more addresses.
- Write the alert to the application event log on the Management Service host.

You can specify that one or more of the following triggers an alert:

- Success of a backup, mount, link, restore, or preview operation.
- Failure of a backup, mount, link, restore, or preview operation.
- Warning about a backup, mount, link, or restore operation.
- Canceled backup, mount, link, or restore operation.
- Operations that take longer than a specified time.
- Low disk space.
- A secondary Backup Service is used for backup.

- Full backup triggered by the size of a differential backup.

You can explore the following for more information about alerts:

- Learning about alerts
- Viewing alerts in the Management Console
- Configuring the alert settings
- Managing the alert notification settings
- Configuring alert grooming

Learning about alerts

An alert is a message from Metalogix Backup for SharePoint when a specified condition occurs. You can choose what triggers the alert and also what happens when Metalogix Backup for SharePoint generates the alert.

The Alerts tab in the Alert Settings window lets you configure when Metalogix Backup for SharePoint generates alerts. Alert notifications are grouped in the following categories:

- Operation status alerts
- General alerts

What do the alerts inform me about?

Operation status alerts inform you about backup, mount, link, restore, and preview failures. These alerts also inform you about errors that Metalogix Backup for SharePoint encounters during a backup, mount, link, restore, or preview. Finally, the alerts inform you when a backup, mount, link, restore, or preview is successful, and when a backup or restore is canceled.

General alerts notify you about conditions that are not specific to a single backup or restore operation. Rather, general alerts warn you about issues that are common to all backups. Specify alert settings for each farm separately.

What triggers an Operation Status Alert?

The following events can trigger an operation status alert:

Failed

When selected, Metalogix Backup for SharePoint generates an alert when an operation fails. Backup, mount, link, restore, and preview operations can all generate failed alerts.

Warning

When selected, Metalogix Backup for SharePoint generates an alert when a backup, mount, link, or restore operation succeeds, but encounters errors.

Successful

When selected, Metalogix Backup for SharePoint generates an alert when an operation succeeds. Backup, mount, link, restore, and preview operations can all generate successful alerts.

Canceled

When selected, Metalogix Backup for SharePoint generates an alert when a user cancels a backup, mount, link, or restore operation.

What triggers a General Alert?

You can specify the triggers for general alerts. Any of the following conditions can trigger a general alert:

Secondary Backup Service used for operation

When selected, Metalogix Backup for SharePoint generates an alert if the default Backup Service is unavailable and Metalogix Backup for SharePoint uses a secondary Backup Service to perform a backup or restore operation.

Operation took longer than <number> <unit>

When selected, Metalogix Backup for SharePoint generates an alert when a backup takes longer than the amount of time that you specify.

Differential backup set size triggered a full backup for next scheduled time

When selected, Metalogix Backup for SharePoint generates an alert when the size of a differential backup triggers a full backup during the next scheduled backup.

You specify when the differential backup size triggers a full backup when you create the scheduled backup. For more information about creating a scheduled backup, see Configuring farm backups.

Warning alert when disk free space falls below <number> GB.

When selected, Metalogix Backup for SharePoint generates a warning alert when the free space it can use to store backup files is lower than the size you specify. The size is in gigabytes (GB). The Backup Service checks the available free space one time each day.

Error alert when disk free space falls below <number> GB.

When selected, Metalogix Backup for SharePoint generates a warning alert when the free space it can use to store backup files is lower than the size you specify. The size is in gigabytes (GB).

Configuring the alert settings

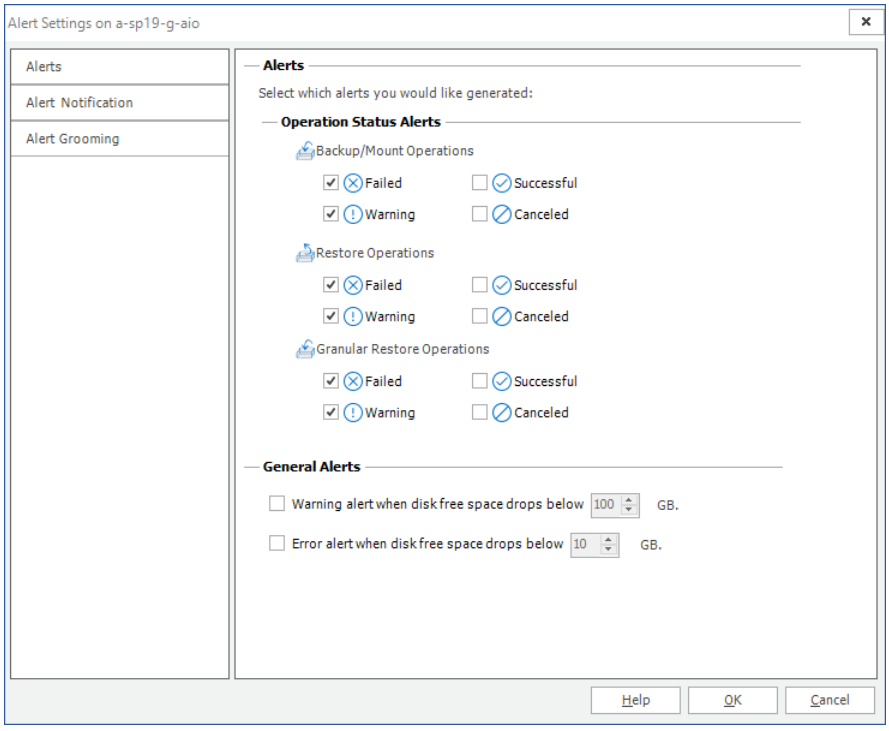
The Management Console lets you configure the conditions that trigger alerts. You can set the alert settings individually for each farm. For more information about the items that can trigger alerts, see Learning about alerts.

How do I configure the alert settings for a farm?

Use the Alert Settings window to configure the alert settings for a farm.

To configure the alert settings for a farm

1. Open the Management Console.
2. From the Management Console workspace selector click either **Farm backup/Restore** or **Granular Restore**.
3. Select the farm for which you want to set alerts.
4. From the **Alerts** tab, click **Configure Alert Settings**.
5. In the Alert Settings window, click **Alerts**.
6. In the Alerts pane, configure the settings for the farm alerts.



7. Click **OK** to close the window and save the changes.

Working with alerts in the Management Console

The Management Console lets you view all of the alert notifications generated by Metalogix Backup for SharePoint. Deleted alerts do not appear in the Alerts view. You can delete alerts manually. In addition, alert grooming can delete alerts automatically.

How do I view alerts?

The Alerts view in the Management Console lets you review and delete alerts and configure alert triggers. The Alerts view also lets you filter alerts to display only those alerts that are most important to you.

To view alerts

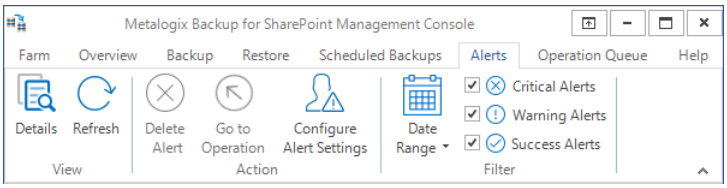
1. Open the Management Console.
2. From the Management Console workspace selector click either **Farm backup/Restore** or **Granular Restore**.
3. Select the farm for which you want to set alerts.
4. From the **Alerts** tab, click **Refresh** to get the latest set of alerts.

How do I filter the displayed alerts?

You can use the Alerts view to filter alerts and display only those alerts that are most important to you.

To filter alerts in the Alerts view

1. From the ribbon of the **Alerts** tab, select one or more of the following check boxes to display alerts in that category.

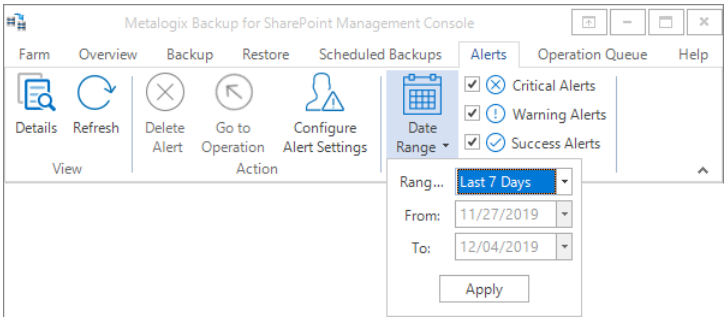


   - Critical Alerts
   - Warning Alerts
   - Success Alerts

2. From the ribbon of the **Alerts** tab, click **Date Range**. In the pop-up dialog, do one of the following:
   a. Select a predefined range from the **Range** drop-down list.

      or

b. Select **Custom** from the **Range** drop-down list, then specify the start date in the From field and the end date in the **To** field.



3. Click **Apply**.

How do I delete an alert?

You use the Alerts view to delete an alert.

To delete an alert

1. In the Alerts view, select an alert.
2. From the ribbon of the **Alerts** tab, click **Details**
3. In the Action area of the ribbon, click **Delete Alert**.
4. In the Message window, click **Yes** to confirm that you want to delete the alert.

How do I go to the operation that triggered an alert?

You can navigate from the Alerts view see the operation that triggered the alert in the Overview tab.

To go to the operation that triggered an alert

1. In the **Alerts** view, click any alert to select it.
2. From the ribbon of the **Alerts** tab, click **Go to Operation**.

Configuring the alert notification settings

The Alert Notification tab of the Alert Settings window lets you specify how Metalogix Backup for SharePoint handles alerts. You can specify that alerts are entered in the Alert Log, sent as an email, or both. If you choose to send an email, you must specify the following settings:

Option	Description
Sender Name	If the SMTP server that you specify allows anonymous emails, the name that you specify appears in the email as the sender of the alert message. If your

	SMTP email server requires authentication, the sender name is the name of the authorized user.
Reply-to address	The address that receives any replies to the alert notification. This must be a valid email address.
Recipient(s)	Enter one or more recipients of the alert email. If you enter more than one recipient, separate addresses with semicolons (;).
Message footer	The specified text appears below the alert in the message.
SMTP Server Address	The address of the SMTP mail server that Metalogix Backup for SharePoint uses to send the email.
SMTP Server Port	The TCP/IP port that Metalogix Backup for SharePoint uses to connect to the SMTP server.
Use an SSL encrypted connection	When selected, Metalogix Backup for SharePoint uses a Secure Socket Layer (SSL) connection to connect to the SMTP server you specify. The SMTP server must be configured to allow SSL connections.
SMTP Server requires authentication	When selected, Metalogix Backup for SharePoint uses the user name and password that you specify for the SMTP server when it sends the alert email. If the SMTP server that you specify uses integrated security, the reply-to address that you specify must be a valid email account that matches the user name and password that you specify.

You specify alert settings individually for each farm.

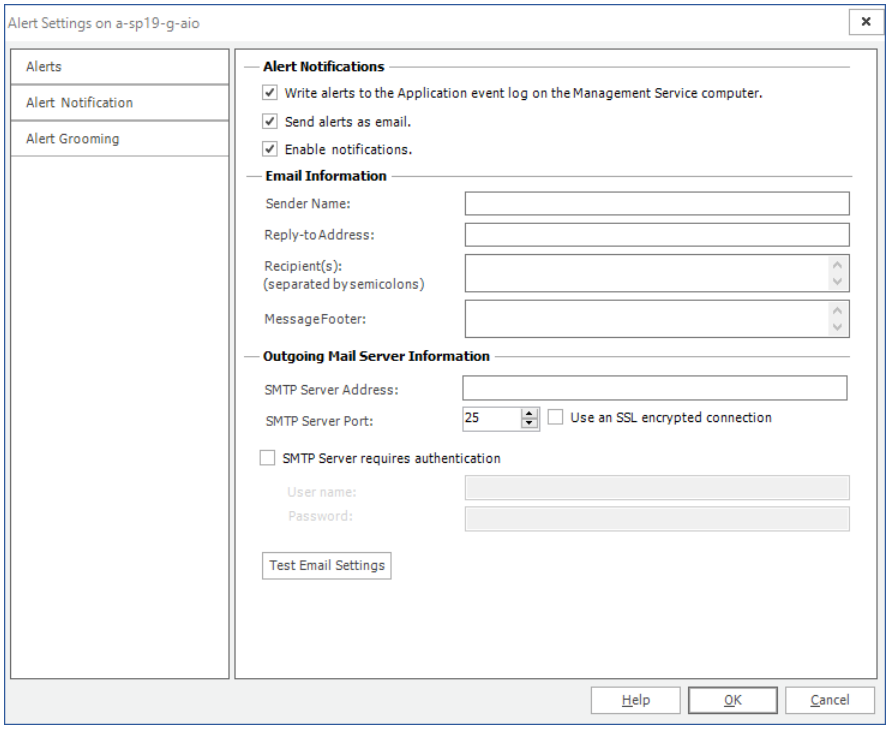
How do I configure the alert notification settings?

You use the Alert Notification tab of the Alert Settings window to configure your alert notifications.

To configure the alert notification settings

1. Open the Management Console.
2. From the Management Console workspace selector click either **Farm backup/Restore** or **Granular Restore**.
3. Select the farm for which you want to set alerts.
4. From the **Alerts** tab, click **Configure Alert Settings**.
5. In the Alert Settings window, click **Alert Notification**.

6. Specify your Alert Notification preferences.



2. Click **OK** to close the window and save the changes.

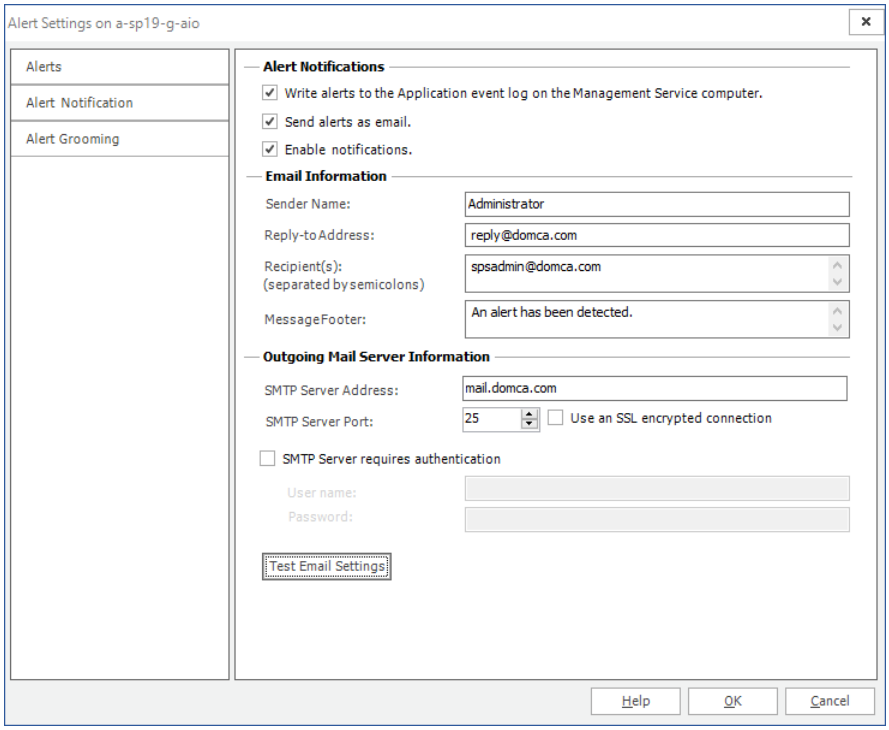
How do I test email alert notification settings?

You use the Test Email Settings button in the Alert Notification tab of the Alert Settings window to test the email settings you specified for email alerts.

To set up and test the email alert notification settings

1. In Open the Management Console.
2. From the Management Console workspace selector click either **Farm backup/Restore** or **Granular Restore**.
3. Select the farm for which you want to set alerts.
4. From the **Alerts** tab, click **Configure Alert Settings**.
5. In the Alert Settings window, click **Alert Notification**.

6. Input the required information for the email address which you would like Backup to set alert notifications to. Click **Test Email Settings** to send a test email using the current settings.



7. Click **OK** to close the window.

How do I view alert notification details?

The Alerts view lets you view the details of any alert.

To view alerts

1. Open the Management Console.
2. From the Management Console workspace selector click either **Farm backup/Restore** or **Granular Restore**.
3. Select the farm for which you want to set alerts.
4. From the ribbon of the **Alerts** tab, click **Refresh** to get the latest set of alerts.
5. From the Alerts list, select an alert.
6. From the ribbon of the **Alerts** tab, click **Details**.

Configuring alert grooming

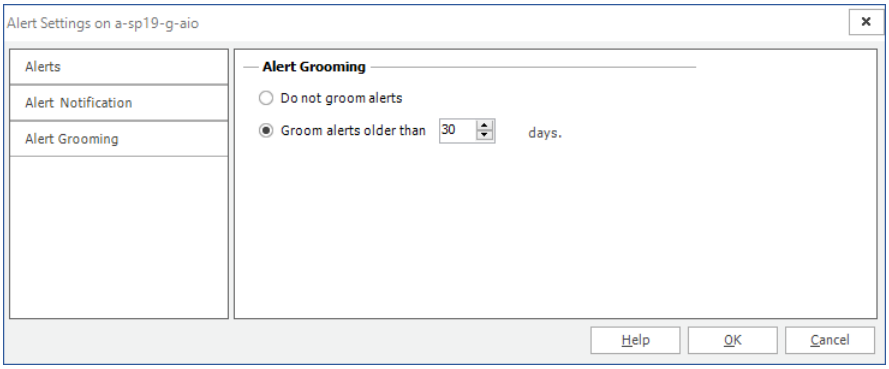
Metalogix Backup for SharePoint alert grooming lets you automatically remove any alert notifications that are older than the number of days specified. Groomed alerts no longer appear in the Alerts page in the Management Console. By default, Metalogix Backup for SharePoint grooms alerts older than 30 days, automatically deleting older alerts. To change alert grooming, you must configure the settings separately for each farm.

How do I configure the alert grooming settings?

You use the Alert Settings window in the Management Console.

To configure Alert Grooming settings

1. Open the Management Console.
2. From the Management Console workspace selector click either **Farm backup/Restore** or **Granular Restore**.
3. Select the farm for which you want to set alerts.
4. From the **Alerts** tab, click **Configure Alert Settings**.
5. In the Alert Settings window, click **Alert Grooming**.



Click **Do not groom alerts** or **Groom alerts older than** and choose the number of days to keep the alerts.

6. Click **OK** to close the window and save the changes you made to the alert grooming settings.

Managing backup set disk space

The Summary pages in the Farm Backup/Restore view in the Management Console lets you monitor the disk space that your backup sets use. You can also view the disk space that remains in the backup location that you specified.

Metalogix Backup for SharePoint lets you archive older backup sets to alternate media. You can save archived backup sets that are no longer actively used. You can then reuse the disk space those backup sets used for newer backups. If circumstances require it, you can import the archived backup set and restore objects from the archived set. For more information about archiving and importing backup sets, see Archiving backup sets and Importing backup sets.

Archiving backup sets

While Metalogix Backup for SharePoint does not offer backup set archiving functionality, you can archive older backup sets using Windows Explorer or any other file management tool. When you archive a backup set, you can move the backup set to another disk, allowing you to conserve space on your backup disk and archive the backup set for the future.

Archived backup sets continue to appear in the Management Console, but you cannot review or restore the contents of those sets. If you need to access the contents of an archived backup set, you must import the set. For more information about importing a backup set, see Importing backup sets.

Each backup set in the backup set location is stored in a folder with a unique name. The name is based on the name of the backup set and a time stamp.

How do I archive a backup set?

You can use Windows Explorer or any other file management tool to archive backup sets. You do not use the Management Console to archive backup sets.

To archive a backup set

1. Open Windows Explorer or any other file management tool.
2. Access the directory that contains your backup sets.
3. Use the file management tool to copy that directory to another location.
4. In the Management Console, delete the operation that uses the backup set. The Management Console also deletes the original copy of the backup set directory.

Importing backup sets

You can import a backup set that you have removed from Metalogix Backup for SharePoint. When you import a backup set, you make it available for Metalogix Backup for SharePoint to use for backup and restore operations.

You might import a backup set in the following cases:

- Reinstating an archived backup set to review or restore its contents.
- Moving a backup set to a new installation of Metalogix Backup for SharePoint.

When you import a backup set from a differential backup, you must ensure that you also import the associated full backup. If you import a backup set created by Metalogix Backup for SharePoint 5.0 that includes a farm component backup, Metalogix Backup for SharePoint only successfully imports full backups. It does not successfully import backup sets that include differential backups of farm component backups. Both full and differential backups are imported from granular backups and are imported for all backup sets and all backup types created by Metalogix Backup for SharePoint 3.1 and newer.

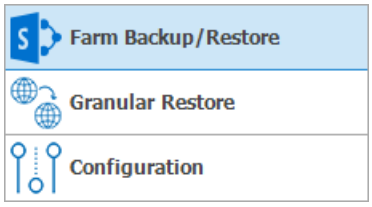
How do I import a backup set?

Use the Import Backup Sets window to import a backup set. When you import backup sets, you copy all of the backup sets that you want to import into a single directory. In the Import Backup Sets window, you specify that directory as a UNC path and Metalogix Backup for SharePoint imports every backup set in the directory.

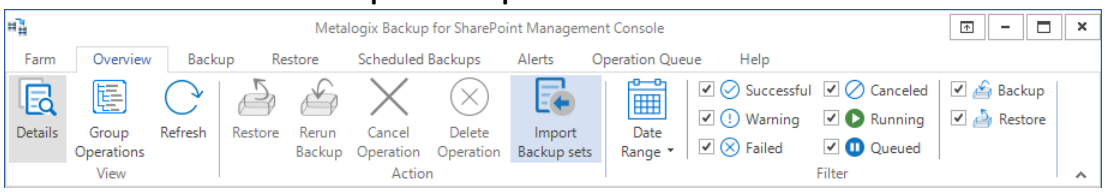
If the repository database includes information about a backup set that you import, Metalogix Backup for SharePoint updates the repository database with the new information.

To import backup sets

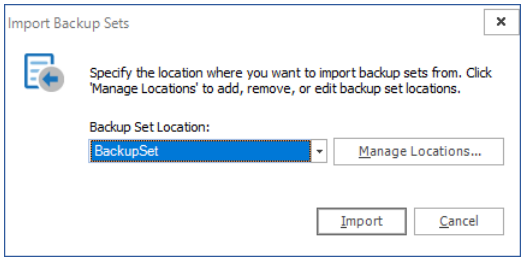
1. Using the Windows Explorer or another file management tool, move all of the backup sets you want to import into a single directory. Note the UNC path of this directory.
2. From the Management Console workspace selector click **Farm Backup/Restore**.



3. From the **Overview** tab click **Import Backup Sets**.



4. In the Import Backup Sets window, do one of the following:
   - Select the location that contains the backup sets to import from the **Backup Set Location** drop-down list.
   - Click **Manage Locations**. In the Backup Service Preferences window that opens, specify a new backup location, then select that location from the **Backup Set Location** drop-down list.



5. Click **Import**. Metalogix Backup for SharePoint imports all backup sets from the specified location.

Data grooming

Metalogix Backup for SharePoint can automatically delete (groom) backup sets based on configured parameters, saving disk space for newer backup sets. Backup sets are groomed based on how many sets already exist, or based on how old the sets are.

If Data Grooming is enabled, Metalogix Backup for SharePoint will look for backup sets to delete from the repository and disk once a day, at the configured time. If an expired set is found, it will be deleted at that time.

If a full backup is older than the maximum retention time in days but is associated with a differential backup that is within the permitted date range, the full backup will not be groomed.

Data grooming preferences can be configured separately for each farm in the Management Console, Management Service Preferences. Grooming options for scheduled backup jobs are also configured here.

It is also possible for Metalogix Backup for SharePoint to keep a specific number of good backups, no matter their age. For more information about setting the Management Service Preferences, including grooming, see Defining the Management Service preferences.

When enabling data grooming, it is best to schedule it to for a non-peak time when it will not interfere with your enterprise network, as data grooming can be a processor and disk-intensive process.

TIP: Metalogix Backup for SharePoint can use Tivoli Storage Manager (TSM) to store backup set content. If you enable data grooming for a backup set that Metalogix Backup for SharePoint stores in TSM, 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. For more information about using TSM, see Learning about Tivoli Storage Manager.

Steps to activate data grooming

1. From the Management Console workspace selector click **Configuration**.
2. Select the farm whose Management Service preferences you want to set
3. From the **Configuration** tab, click **Management Service**.
4. In the Management Service Preferences window, set the preferences in the **Grooming** section as follows:
5. Delete backup sets based on count - select this option to delete a predefined number of backup sets.
6. Delete backup sets based on age - select this option to delete a backup sets based on number of days.

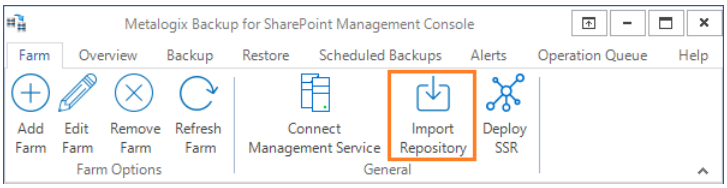
7. Check for expired backup sets - if the check box is checked the backup set count that will be determined for deletion will be calculated at the specified local time on the Management service computer.
8. Retain last *n* log files - if the check box is checked the specified number of log files will be deleted. Console logs will only be deleted after the scheduled grooming time has passed and the console has been closed and reopened
9. Click **OK** to close the window and save the changes you made to the data grooming settings.

Importing a Repository Database

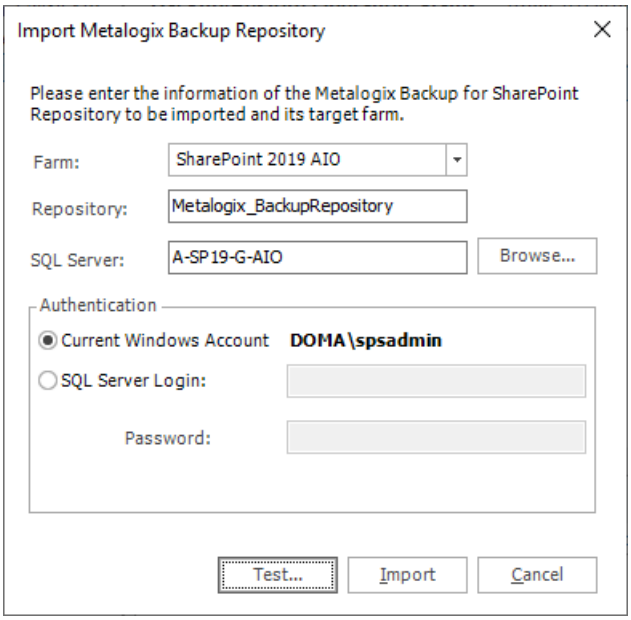
You can consolidate operational data from one or more Repositories into your current Repository by importing the data from those repositories. All types of operational data related to backups and restores of components and granular objects from the imported Repository will be copied to the current Repository and will be displayed in the Management Console. System information and preferences in your current environment will not be affected.

Steps to import a Repository database

1. From the Management Console toolbar click **Farm** > **Import Repository**.



2. The **Import Metalogix Backup Repository** dialog appears.



3. Enter the following information:

   a. **Farm** - Enter the target farm for which the repository should be imported.

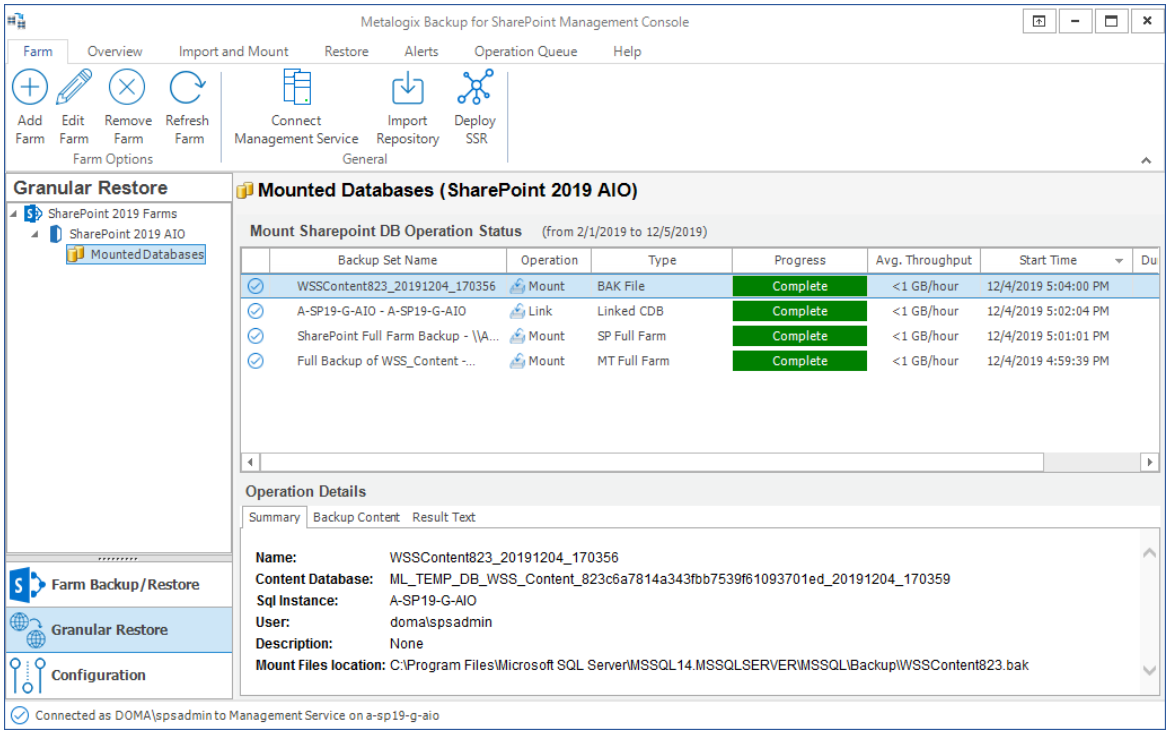
   b. **Repository** - the name of the repository database that will be imported.

   c. **SQL Server** - The name of the SQL Server instance that contains the Repository database to be imported. You can click **Browse** to locate the SQL Server if needed.

   d. **Authentication** - The credentials needed to access the Repository database. The default authentication method uses the **Current Windows Account**. If you prefer to use the **SQL Server** authentication, enter the Login and Password.

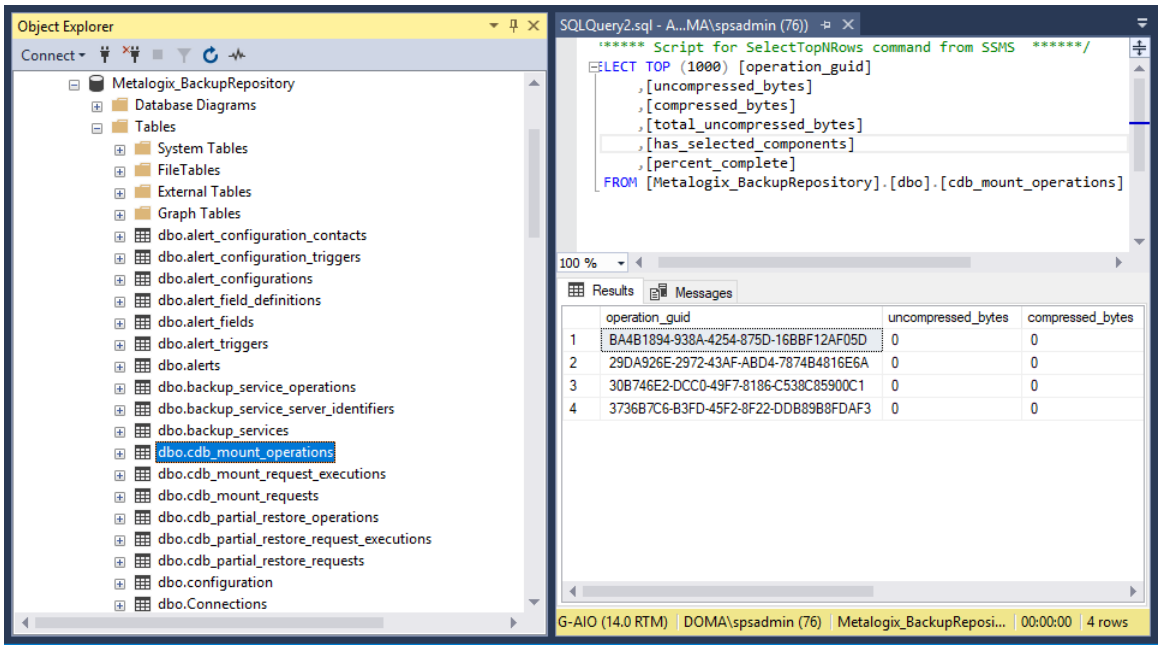
4. Click **Test** to validate the connection to the Repository to be imported. If the connection is successful, a confirmation dialog appears. Click OK to accept the confirmation.

5. Click **Import** to complete the operation, or click **Cancel** to exit.

6. 

Viewing Repository Data in the SQL Server database

1. Expand the **Metalogix_BackupRepository** database and locate the **cdb_mount_operations** table. An SQL query can be used to verify the two operations exist.



Managing self-service recovery

The Metalogix Backup for SharePoint Self-Service Recovery feature lets SharePoint site collection administrators and other users download SharePoint library items from Metalogix Backup for SharePoint to their hard disk.

Before you can use the Self-Service Recovery feature, the administrator must deploy it and configure the options. After deploying the feature, the site collection administrator of each site collection where the feature is enabled can download backed-up library item files. The site collection administrator can also delegate authority to individual users to download files.

Delegated users can download files from the backup sets that Metalogix Backup for SharePoint creates if both their current permissions for the files and their permissions at the time of the backup allow them to view the files.

See the following topics to manage the Self-Service Recovery solution:

- Steps to deploy the Self-Service Recovery solution
- Steps to repair the Self-Service Recovery solution
- Steps to remove the Self-Service Recovery solution
- Steps to upgrade the Self-Service Recovery solution
- Delegate permission for self-service recovery

NOTE: Self-Service Recovery is not supported for SharePoint 2019 or Subscription Edition.

About site collection and SharePoint

Metalogix Backup for SharePoint Self-Service Recovery extends the Metalogix Backup for SharePoint platform to support SharePoint user experience by default. When you create a site collection using a specific SharePoint version, you can select a user experience for that version by selecting version-specific templates.

Look and feel of the SharePoint Self-Service Recovery feature

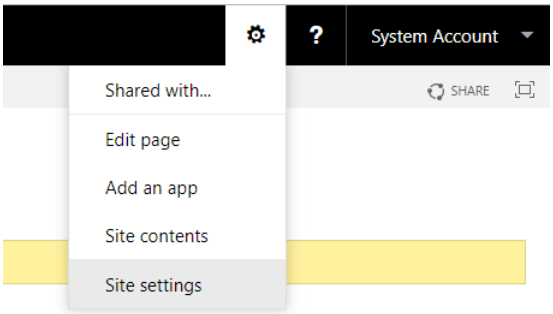
The Self-Service Recovery feature adopts the new look, feel, and capabilities of SharePoint including transparent dashboards, searching items within filters, and custom background images.

Site collections from different SharePoint versions

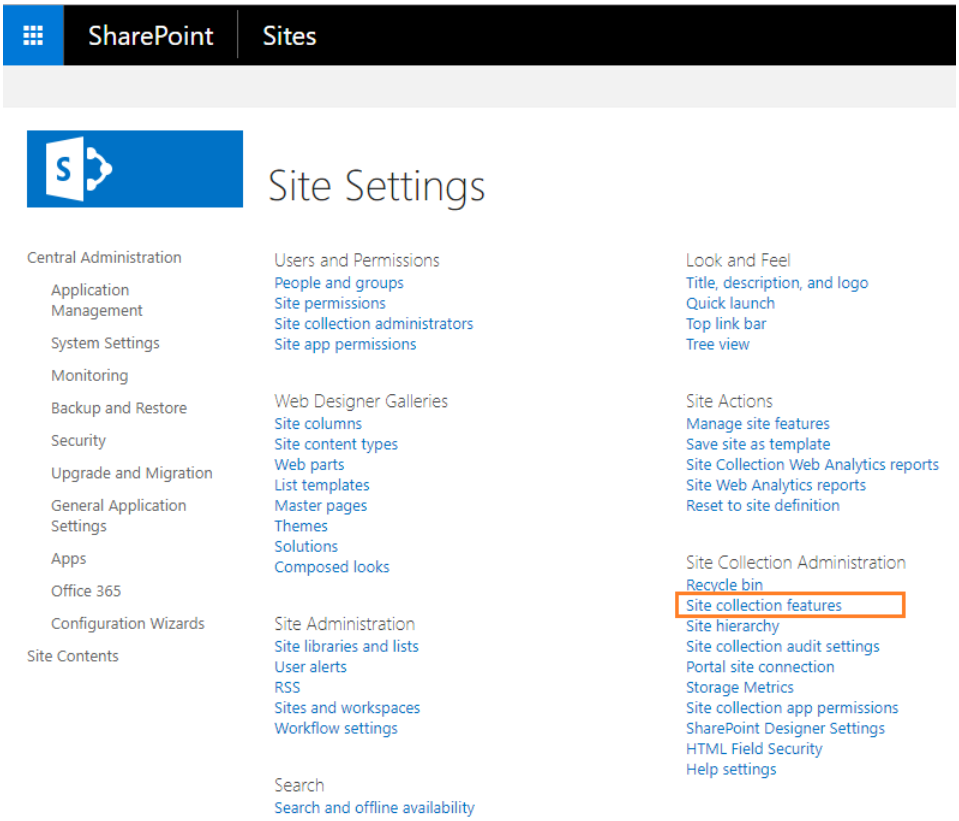
Metalogix Backup for SharePoint allows you to deploy the Self-Service Recovery feature inside a Web application, even if the application includes a mix of site collections from different SharePoint versions.

After you activate the deployed solution as a SharePoint feature on the parent Web application of the site collections, follow the steps described below:

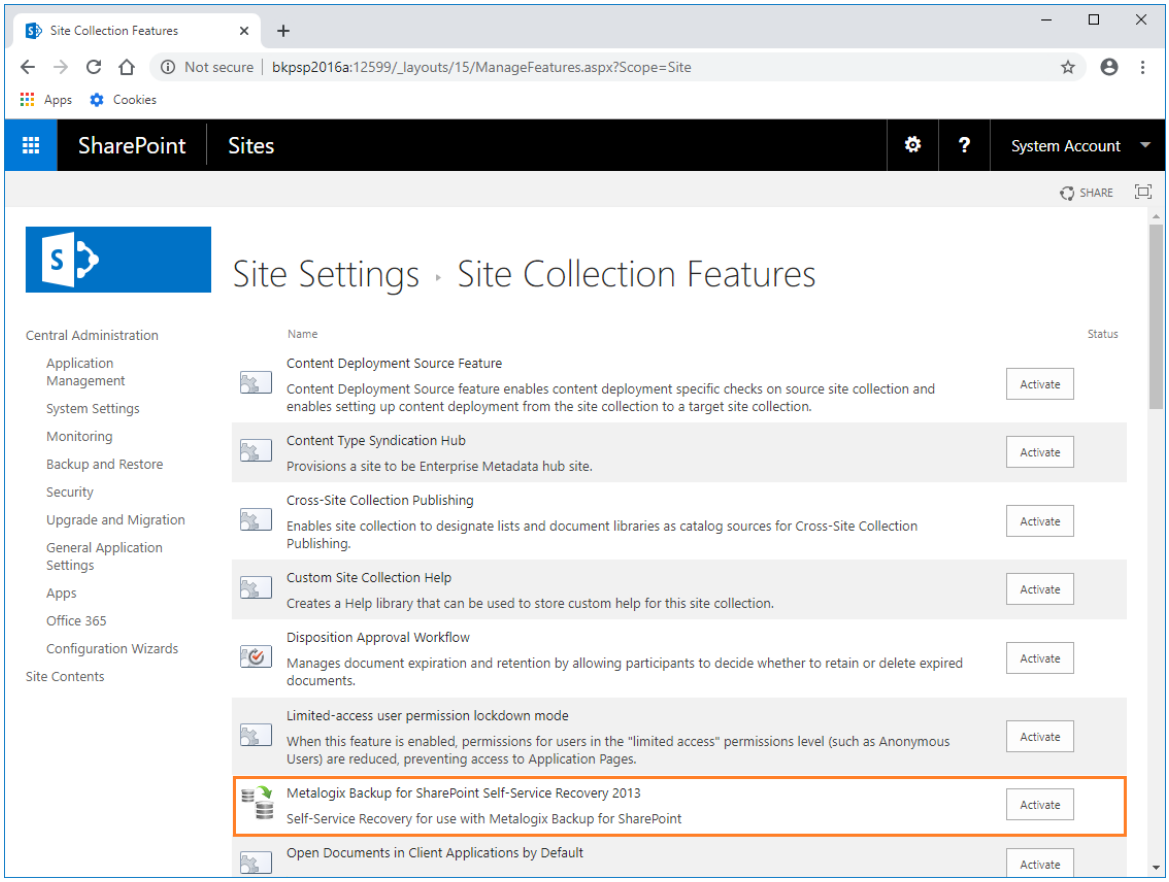
1. Login to SharePoint and go to the Central Administration page.
2. From the top right corner, click **Settings** and then click **Site Settings** from the drop down menu.



3. The **Site Settings** page opens.



4. Click **Site collection features**. The **Site Settings - Site Collection Features** page opens.



5. Click **Activate** to activate the Metalogix Backup for SharePoint Self-Service Recovery solution.

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**.

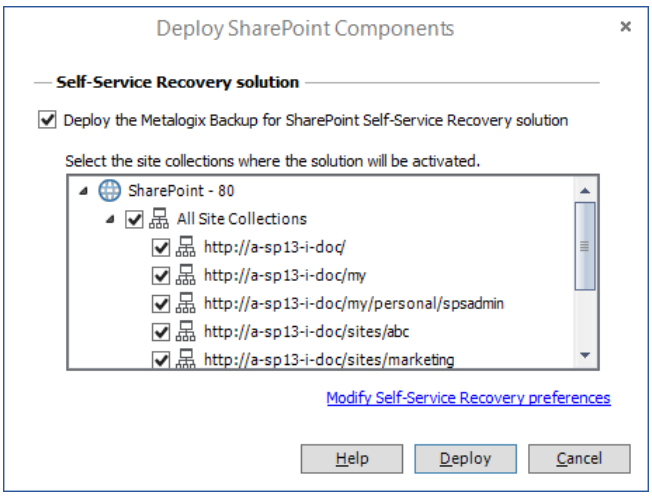
   b. From the **Farms** tab, click **Deploy SSR**. The **Deploy SharePoint Components** dialog appears.

   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.



> **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 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**.

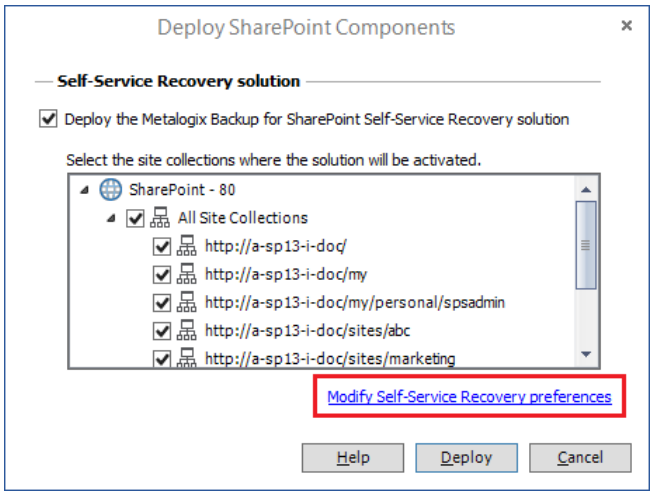
   OPTION 2

   a. From the Management Console workspace selector click **Configuration**.

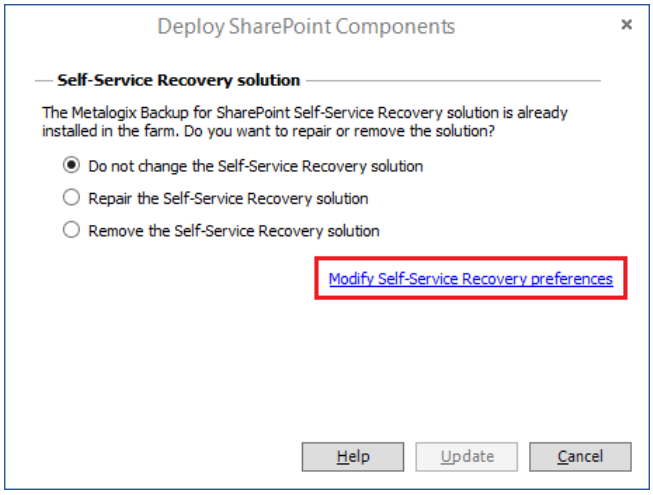
   b. From the **Configuration** tab, click **Deploy SSR**. The **Deploy SharePoint Components** dialog appears..

3. One of two **Deploy SharePoint Components** dialogs appear.

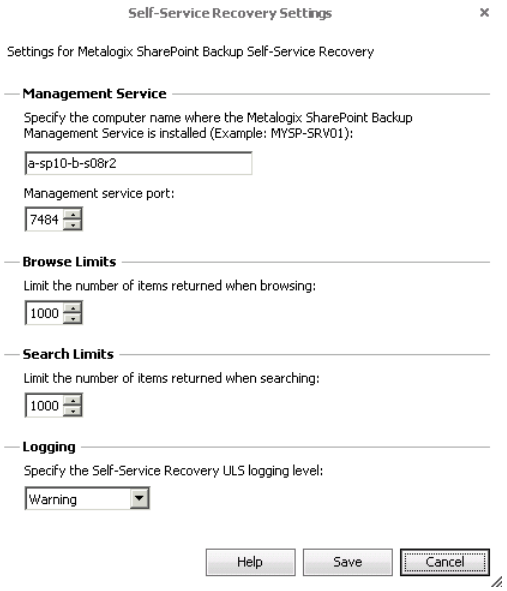
   a. If the Self-Service Recovery solution is being deployed then the **Deploy SharePoint Components** dialog for a deployment appears.



   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**.



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

Repairing, Removing or Upgrading Self-Service Recovery Solution

Use the Management Console to remove, repair or upgrade a previously deployed Self-Service recovery solution.

- Steps to repair the Self-Service Recovery solution
- Steps to remove the Self-Service Recovery solution
- Upgrading the Self-Service Recovery solution

Steps to repair 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**.

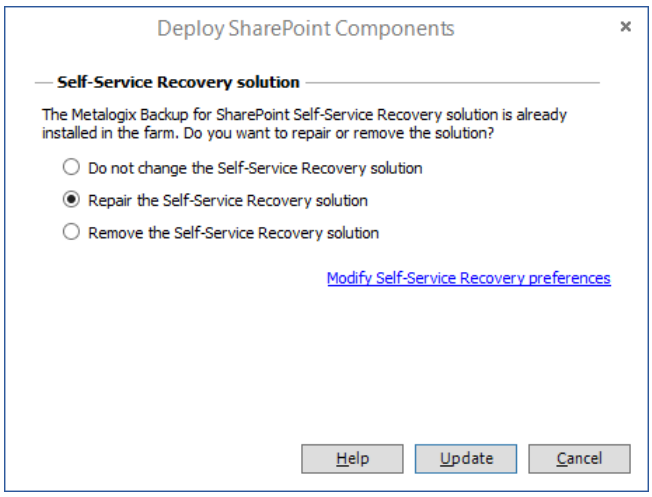
   b. From the **Farms** tab, click **Deploy SSR**. The **Deploy SharePoint Components** dialog appears.

   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. Select the **Repair the Self-Service Recovery solution** option.



4. Click **Update**.
2. If the deployment was successfully repaired, a confirmation dialog appears indicating the success of the operation.

Steps to remove 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**.

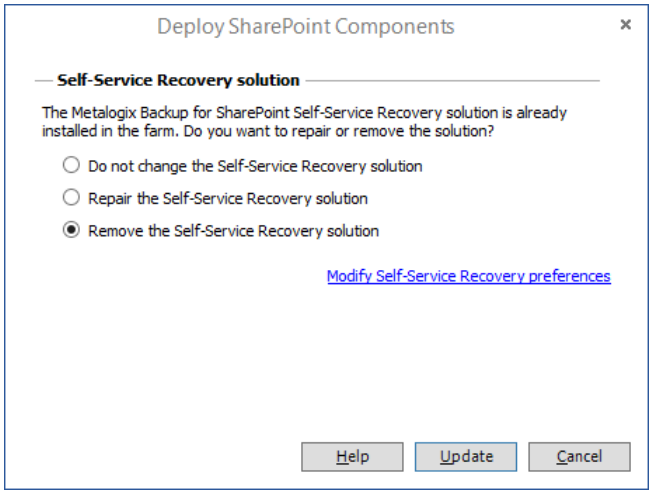
   b. From the **Farms** tab, click **Deploy SSR**. The **Deploy SharePoint Components** dialog appears.

   OPTION 2

c. From the Management Console workspace selector click **Configuration**.

d. From the **Configuration** tab, click **Deploy SSR**. The **Deploy SharePoint Components** dialog appears.

3. Select the **Repair the Self-Service Recovery solution** option.



4. Click **Update**.

5. If the deployment was successfully repaired, a confirmation dialog appears indicating the success of the operation.

Upgrading a Self-Service Recovery solution

When you deploy or repair the Self-Service Recovery feature, Self-Service Recovery components are updated automatically. When you upgrade from version 6.3, you must uninstall the Self-Service Recovery components if you have installed them already. After the upgrade, you must re-install the Self-Service Recovery components.

Delegating Self-Service Recovery permission

The Metalogix Backup for SharePoint Self-Service Recovery feature lets authorized users download content from backup sets. Site collection administrators can always use the Self-Service Recovery feature to download content from backup sets. Members of the site collection administrators group can view and download any files that Metalogix Backup for SharePoint has backed-up in the current site collection. Site collection administrators can also delegate permission to download backed-up content to specific users.

The content that delegated users can see and download depends on the following:

- The current permissions that the user has for the content.
- The permissions the user had at the time the backup was created.

To view the contents of a site or a library, the user must either have current access to the site or library, or the user must have had access at the time that the content was backed-up.

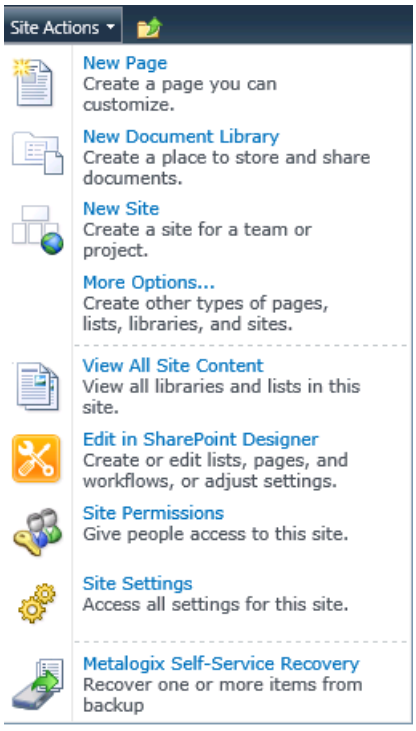
To download a backed-up file, the user must have current access and also access at the time that the file was backed-up. If either set of permissions does not allow access, the user cannot download the backed-up content.

How do I delegate a Self-Service Recovery permission to a user?

You use the Site Settings page in the SharePoint site collection to delegate permission to a user. You must be a member of the site collection administrators group to delegate permission to perform Self-Service Recovery. The Metalogix Backup for SharePoint administrator must install and configure Self-Service Recovery before you can delegate permissions to use Self-Service Recovery.

Steps to delegate a Self-Service Recovery permission

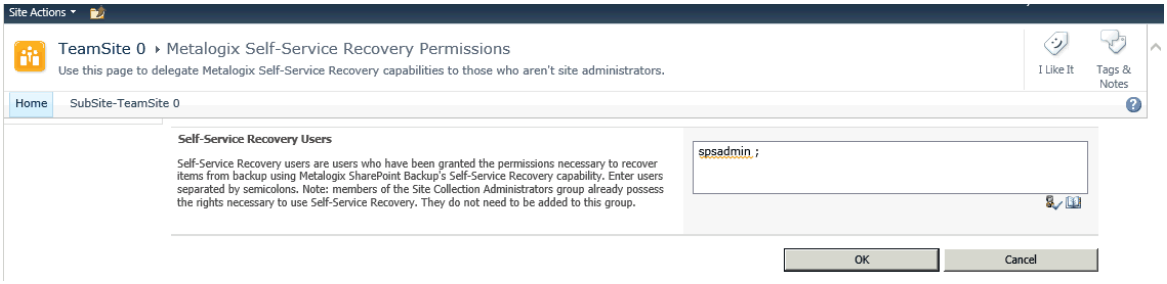
1. In the Site Collection in SharePoint, click **Site Actions** > **Site Settings**.



2. On the **Site Settings** page, in the Users and Permissions area, click **Self-service recovery permissions**.

3. In the **Self-Service Recovery Permissions** page, in the **Self-Service Recovery Users** field, enter the names of users to delegate permission to use Self-Service Recovery. You can use the **Check Names**

and **Browse** icons to locate the correct user names.



4. In the Self-Service Recovery Permissions page, click **OK**.

6

Backing up and restoring farm components

Metalogix Backup for SharePoint helps to back up SharePoint 2013, 2016, 2019 and Subscription Edition farms.

Backups can be made on demand, or on a schedule specified in advance. When starting a backup, always start with a full farm backup. Subsequent backups can then be either full backups like the first one, or smaller, differential backups that only contain objects that have changed since the last full backup. You can then use the backed-up data to restore your SharePoint farm. Differential Backups, whether scheduled or not, will be displayed with Manual Full Backup in the console.

For additional information about backing up and restoring your farms, see Backing up SharePoint farms and Restoring SharePoint farms.

Backing up SharePoint farms

Metalogix Backup for SharePoint can be used to back up SharePoint 2013, 2016, 2019 and Subscription Edition farms.

Microsoft Volume Shadow Copy Service (VSS) is used to collect data from SharePoint components as they work. Metalogix Backup for SharePoint uses VSS to back up and restore the farm components that make up your SharePoint farm while your farm is in use. Your farm must be configured to use VSS. If VSS is not enabled, Metalogix Backup for SharePoint will not be able to back up your SharePoint 2013, 2016, 2019 and Subscription Edition farms. For information about how VSS works, please consult your Windows Server documentation, or the Microsoft article Volume Shadow Copy Service Overview at http://msdn.microsoft.com/en-us/library/aa384649(VS.85).aspx.

Only SharePoint 2013, 2016, 2019 and Subscription Edition farms can use Farm Backup/Restore.

See the following topics for more information:

- Viewing the summary for farm backups
- Viewing the status of farm backup and restore operations
- Viewing scheduled farm backups
- Viewing farm backup alerts
- Starting a full farm backup

Viewing the summary for farm backups

When you select the SharePoint 2013, 2016, 2019 or Subscription Edition farms group in the Farm Backup/Restore pane, Metalogix Backup for SharePoint displays the Farm Backup/Restore Summary page for multiple farms. The Summary pane includes information about the farm that you have added to the Management Console. The information includes the following:

- Activity for the last 7 days
- Storage status
- Unprotected components

In addition, the Summary page lets you perform common tasks. You can do the following in the Summary page:

- Starting a full farm backup
- Scheduling a full or differential farm backup
- Restore farm components or restore an object

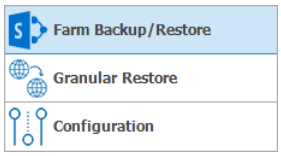
You can also click a farm name for more information about the farm or click a backup location for additional information about the backup location.

How do I view the farm status?

You can view the status pane for any SharePoint 2013, 2016, 2019 or Subscription Edition farms from the **Overview** tab of the **Farm Backup/Restore** workspace.

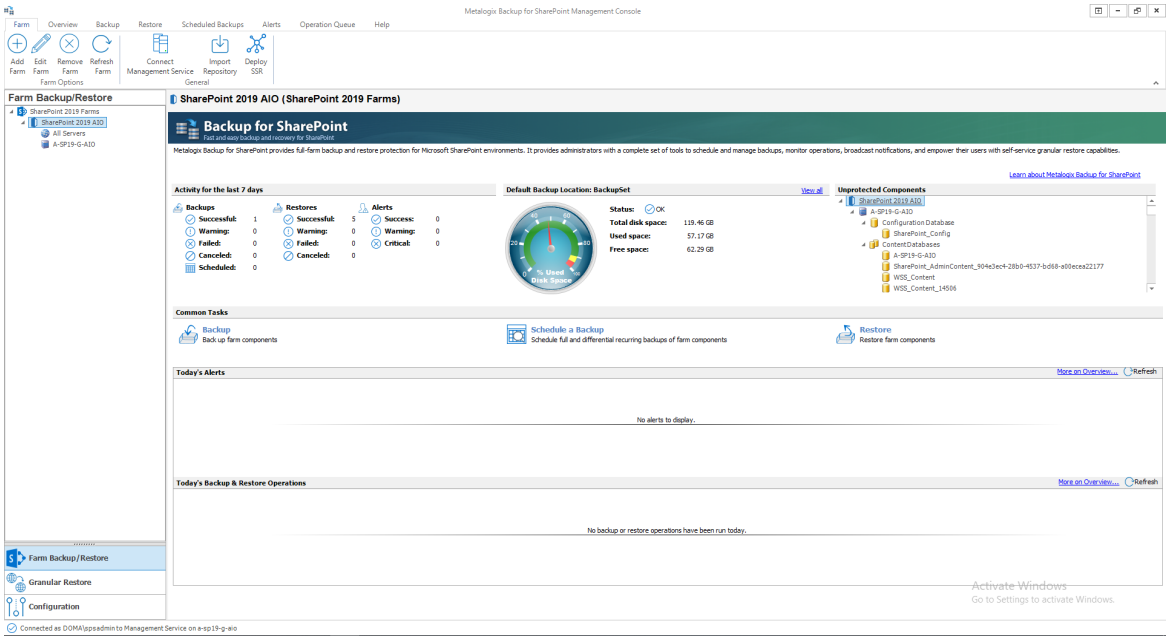
To open the status pane for a SharePoint 2013, 2016, 2019 or Subscription Edition farm

1. In the Management Console, in the left pane, click **Farm Backup/Restore**.



2. In the Farm Backup/Restore pane, click a farm from **SharePoint 2013, 2016, 2019 or Subscription Edition farms**.

3. Review the information in the **Summary** pane for the farm.

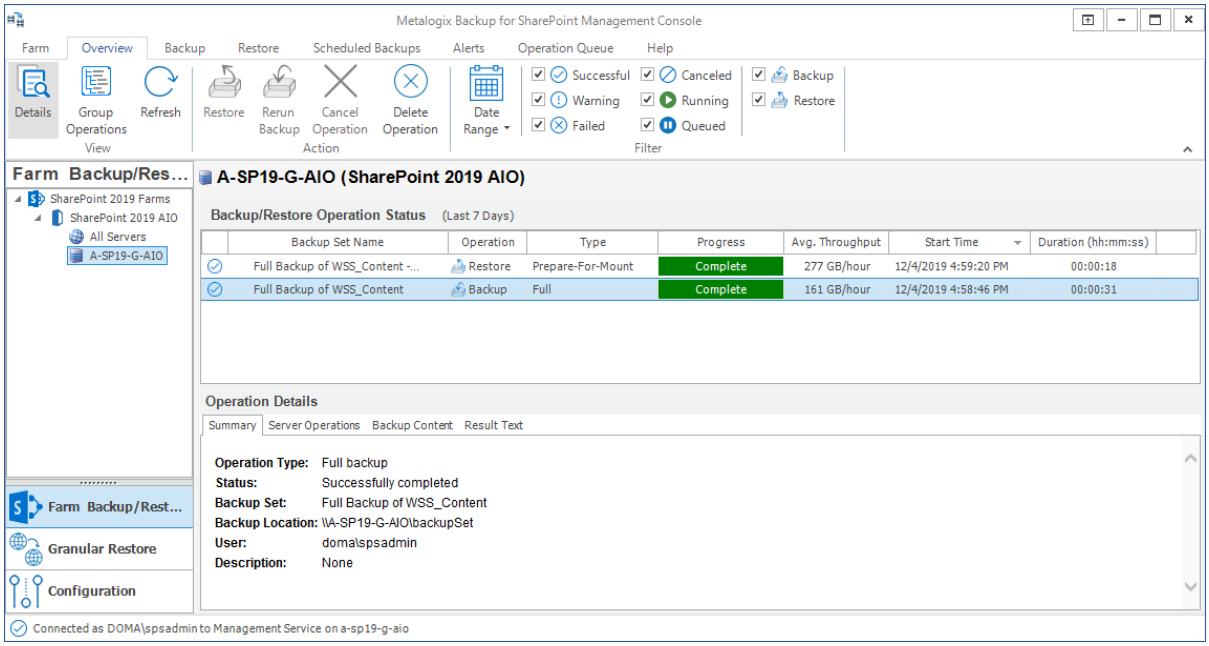


How do I make more disk space available for backup sets?

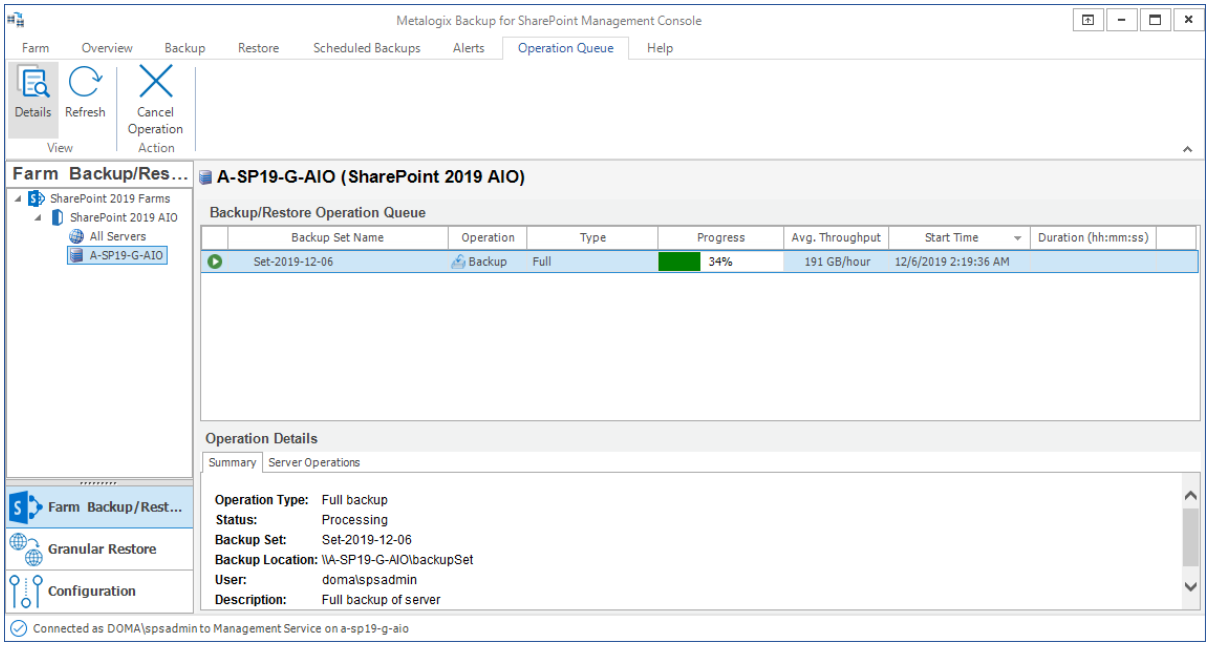
To make additional disk space available, you can archive older backup sets. If necessary, you can import the archived backup sets and restore objects from the archived set. For more information about archiving or importing backup sets, see Archiving backup sets or Importing backup sets.

Viewing the status of farm backup and restore operations

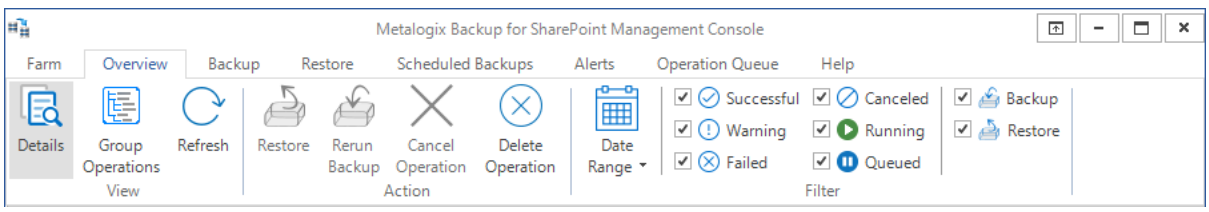
The **Overview** tab of the farm backup/restore view lets you review the status of your farm backups and restore operations. By default, the tab includes a list of the backup and restore operations in the most recent seven days. You can see the name of the backup set, the type of operation, the operation progress, and other information.



The **Operation Queue** tab of the Farm Backup/Restore view lets you review upcoming operations. You can see the name of the backup set, the type of operation, the operation progress, and other information. You can also see the details of any operation that you select in the **Overview** tab.



What actions can I perform in the Overview tab?



You perform the following actions in the Overview tab:

Details - You can view or hide the Operation Details pane by clicking **Details**. The Operation Details pane includes additional information about the selected operation.

Group operations - You can choose to group operations in the status field by clicking **Group Operations**. When you group operations, differential backups are attached to the related full backups.

Refresh - You can manually refresh the operation status field by selecting **Refresh**.

Restore - When you select a backup operation in the status area, you can click **Restore** to restore the backed-up data.

Rerun Backup - When you select a backup operation in the status area, you can click **Rerun Backup** to run the backup operation again.

Cancel operation - When you select a running operation, you can click **Cancel Operation** to stop the operation.

Delete operation - When you select an operation, you can click **Delete Operation** to delete the operation from the status list.

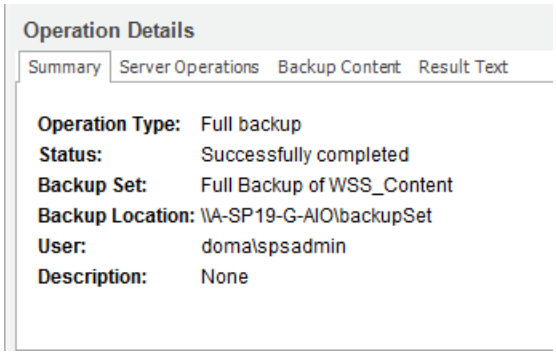
Filter data in the status field - You can select or clear the check boxes in the **Filter** area, or provide a date range, in order to control the items that appear in the status field.

What information does the Operation Details pane include?

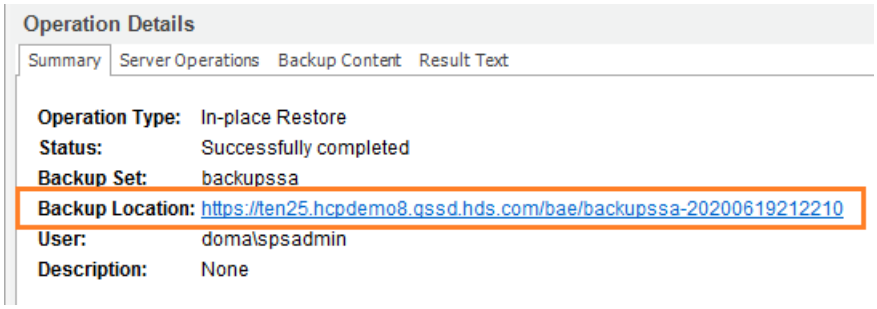
The details pane in the Overview tab displays the following information:

Summary

A summary of the operation is listed that includes the Operation Type, Status, Backup Set name, Backup Location, the User who initiated the operation, and the Description if entered.



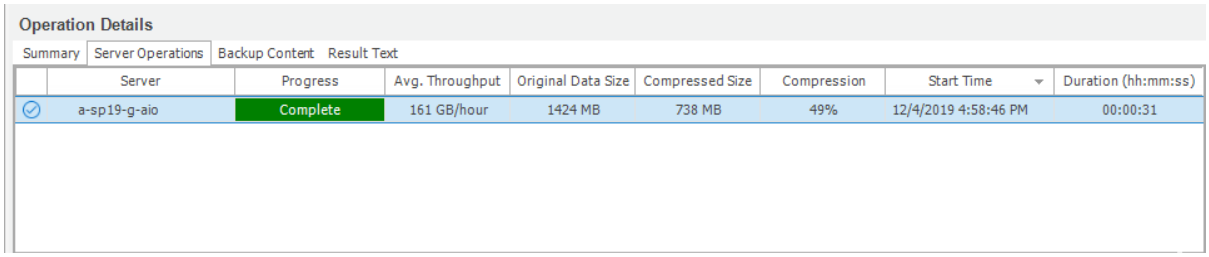
If you use a supported third party backup server like the Hitachi Content Platform (HCP) the Backup Location will indicate the full path or the URI of the backup server location.



For more information about adding third party backup server locations, see Defining the Backup Service preferences.

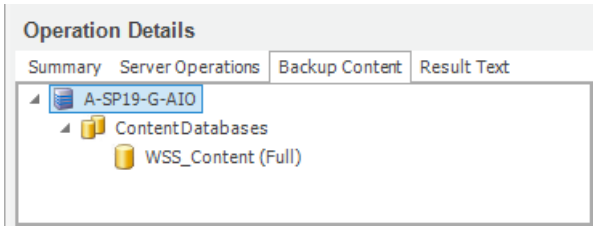
Server operations

Information about the backup on a per-server basis, including the server name, the progress, the average throughput, the original and compressed data sizes, the compression ratio, and the start time and the duration of the operation. The backup set size on the disk may differ from the size of the backed-up data because the backup set includes information created by Metalogix Backup for SharePoint about the Backup Set itself.



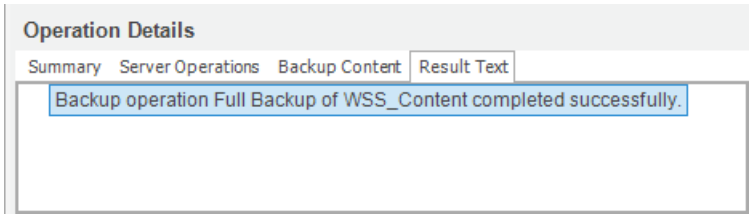
Backup content

The farm components included in the selected operation.



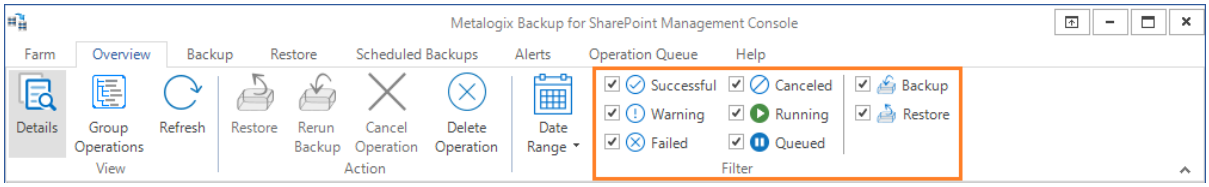
Result text

The results of the selected operation.



How do I filter the contents of the status field?

You can use the check boxes and the date range drop-down in the Filter area of the ribbon in the Overview tab to control what appears in the Backup/Restore Operation Status field.



To filter the contents of the status list

1. Select the check boxes for items that you want to show in the **Backup/Restore Operation Status** list. Clear the check boxes for items that you want to hide.
2. Click **Date Range** to specify a range for the items in the **Backup/Restore Operation Status** field. The default is the last 7 days.

What actions can I perform in the Operations Queue tab?

You perform the following actions in the Operation Queue tab:

Details - You can view or hide the Operation Details pane by clicking **Details**. The Operation Details pane includes additional information about the selected operation.

Refresh - You can manually refresh the operation status field by selecting **Refresh**.

Cancel operation - When you select a queued operation, you can click **Cancel Operation** to stop the operation.

Viewing farm backup alerts

The Alerts tab of the Farm Backup/Restore view in the Management Console lets you view, delete, and configure the related alerts.

How do I view the farm backup alerts?

Use the Alerts tab in the Farm Backup/Restore view to view the existing farm backup alerts.

To view alerts

1. Open the Management Console.

2. From the Management Console workspace selector click either **Farm backup/Restore** or **Granular Restore**.
3. Select the farm for which you want to set alerts.
4. From the **Alerts** tab, click **Refresh** to get the latest set of alerts.

How do I go to the operation that triggered an alert?

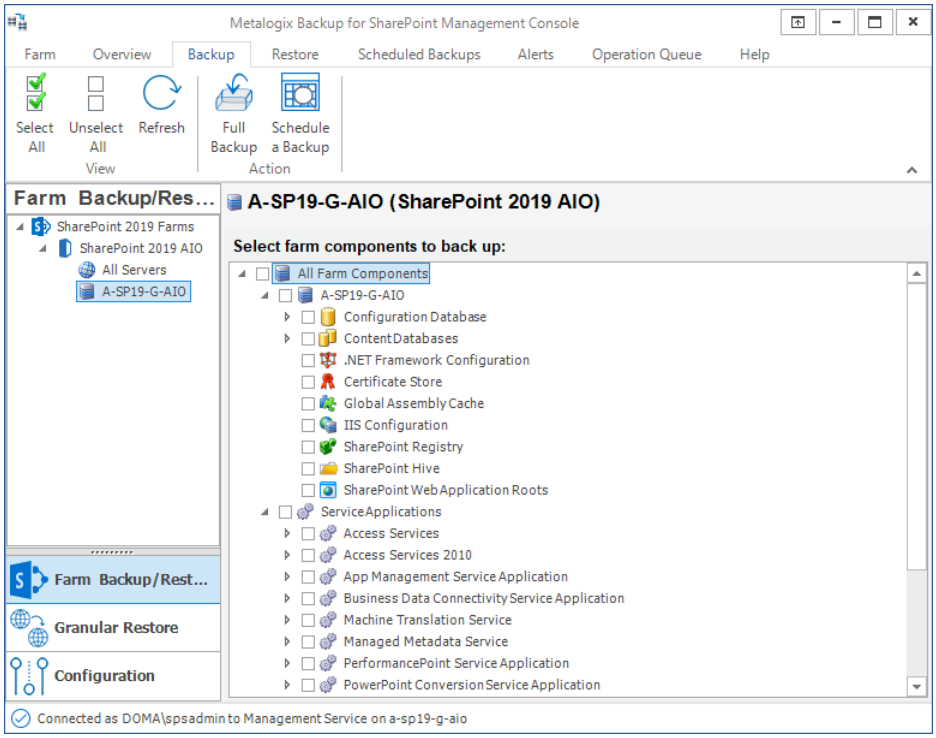
You can navigate from the Alerts view see the operation that triggered the alert in the Overview tab.

To go to the operation that triggered an alert

1. In the **Alerts** view, click any alert to select it.
2. From the ribbon of the **Alerts** tab, click **Go to Operation**.

About Full and Differential Backup

The **Backup** tab of the Farm Backup/Restore view in the Management Console lets you create full and differential backups. You can also schedule backups using this view.



What is the difference between a full backup and a differential backup?

A full backup includes current versions of every item in the scope of the backup and is a complete representation of the state of the backed-up components at the time of the backup. Every item in the scope of the backup is copied during every backup.

A differential backup compares the state of the backed-up content in a specified full backup to the actual content in the SharePoint farm. Metalogix Backup for SharePoint then copies only the changed items into the backup set. You must have both the differential backup and the associated full backup to restore content from the backup.

A differential backup must be a part of a backup schedule. A differential backup will be performed across content databases, the admin database, and the configuration databases only. If any web front end components or service application databases were selected, they will be protected during the scheduled full backups.

For certain component types, the entire component is always backed-up in both full and differential backups. For example, if you include the SharePoint registry in a farm component backup, the entire registry is included in every backup.

NOTE:

Both full and differential backups that include SharePoint databases include the entire SQL Transaction log for the databases. Metalogix Backup for SharePoint does not truncate the log. You must manage the transaction log size in another tool. If you do not manage the log size, it continues to grow in your backup sets.

You can include only one farm component in a single scheduled farm backup. The scheduled farm backup can be a full backup or a paired full backup and differential backup. You can also include the same component in one or more *on-demand full backups*.

If a component is part of a scheduled backup, and a user includes the component in an on-demand backup, the next scheduled backup must be a full backup even if a differential backup is scheduled.

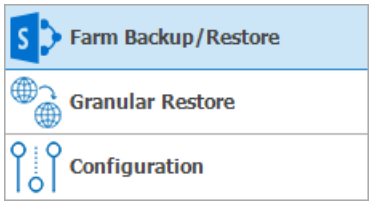
Only a full backup can be an on-demand backup. When you add the component to the on-demand backup, the Management Console warns you that adding the component alters the scheduled backup and asks you to confirm the change. When you restore a component that is part of a scheduled backup, the next scheduled backup is always a full backup.

Starting a full farm backup

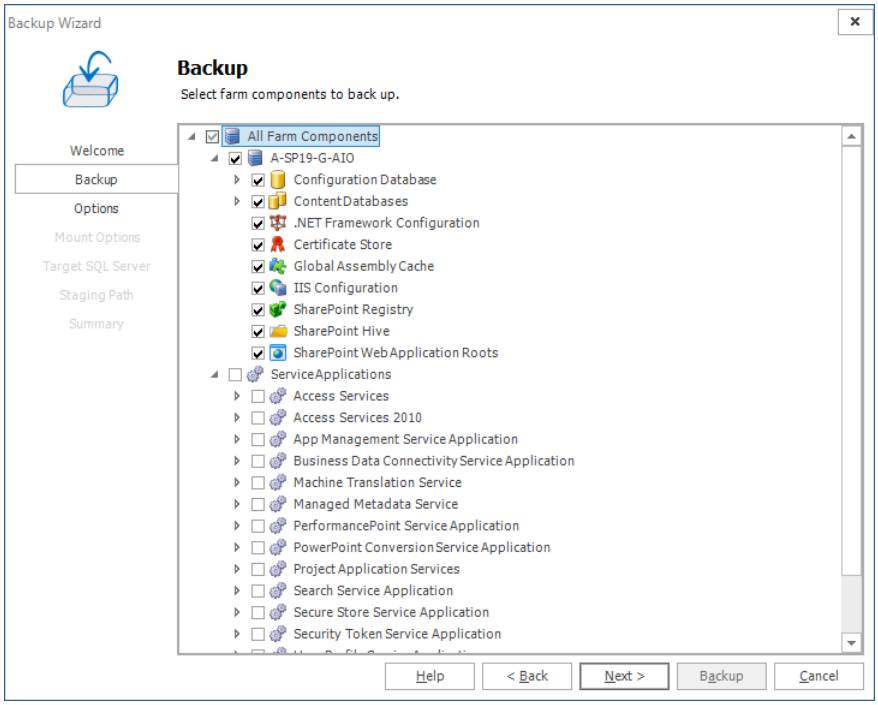
Only users who are members of the farm administrators group can perform farm backups. For information about the components that you can back up, see Using Metalogix Backup for SharePoint in your disaster recovery plans.

How do I start a full farm backup?

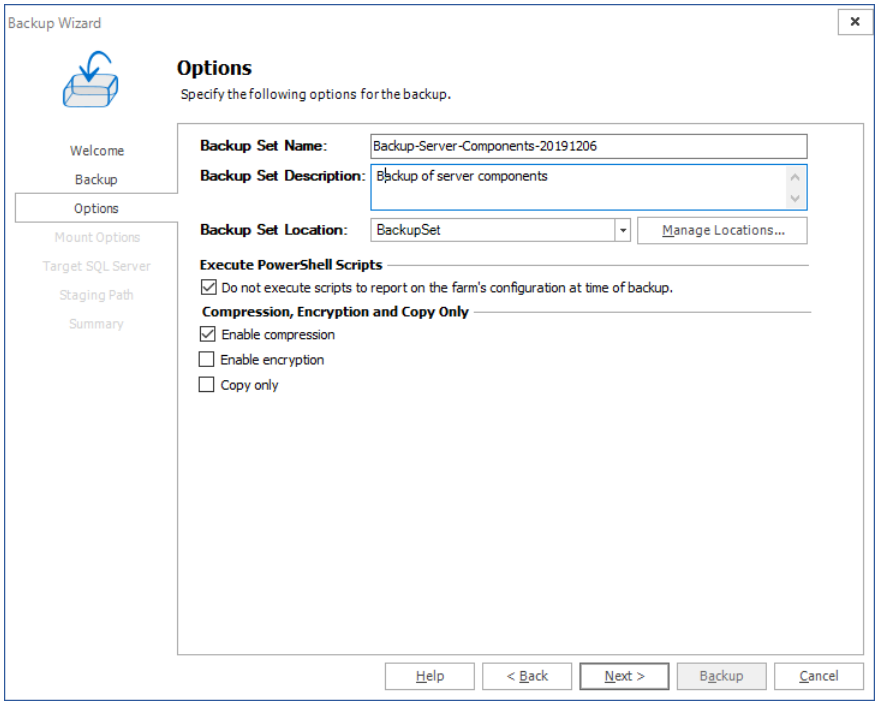
1. From the Management Console workspace selector click **Farm Backup/Restore**.



2. In the Farm Backup/Restore pane, click any server name or **All Servers** for any farm.
3. Click the **Backup** tab.
4. In the **Select farm components to back up** pane, select the check boxes for the items to include in the backup. From the ribbon, you can perform the following actions:
   a. Click the **Select All** to select all farm components.
   b. Click **Unselect All** to clear the selection of farm components.
   c. Click **Refresh** to get the latest set of farm components.
5. From the ribbon, click **Full Backup.** The **Backup Wizard** starts.
6. On the **Welcome to the Backup Wizard** page, click **Next**.
7. On the **Backup** page, review the items that the backup includes. You can review and revise the farm component selections here.



8. Click **Next**. The **Options** step appears.



a. Enter the information as described below:

b. **Backup Set Name** - Specify a name for the backup set. The name appears on the Restore tab when you select the backup set to review and restore.

c. **Backup Set Description** - Enter notes about the backup set.

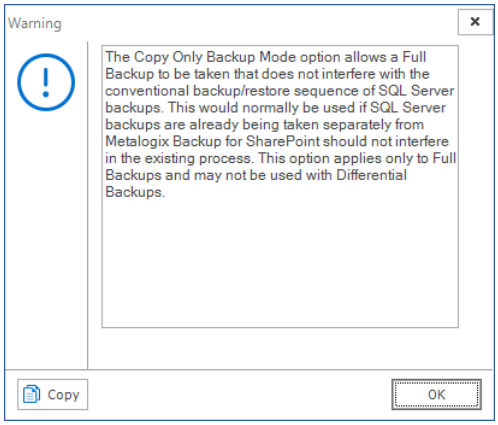
d. **Backup Set Location** - Select a location for the backup set from the drop-down list. You can click **Manage Locations** to open the Backup Service Preferences window and configure the backup locations. For more information about configuring your Backup Service preferences, see Defining the Backup Service preferences.

e. **Do not execute scripts to report on the farm's configuration at time of backup** - Select the check box to prevent Metalogix Backup for SharePoint from providing the farm's configuration at the time of the backup. If the check box is not selected, then users will be able to select the "view farm configuration" option for the backup set.

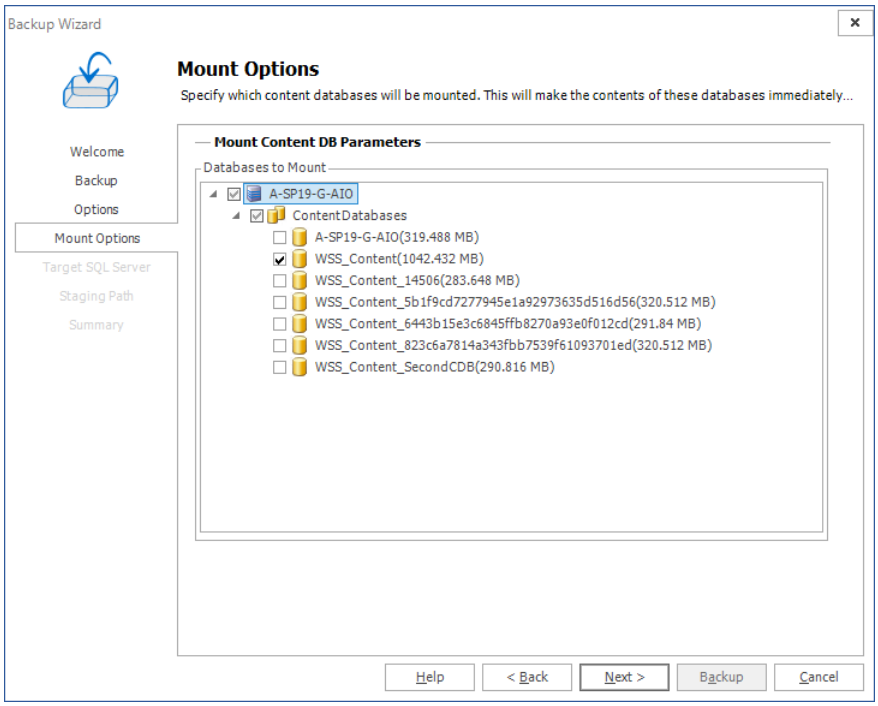
f. **Enable compression** - Select the check box to compress the backup set.

g. **Enable encryption** - Select the check box to encrypt the backup set. If you enable encryption, you must also specify a password for the backup set. You must supply the same password when you restore from the backup.

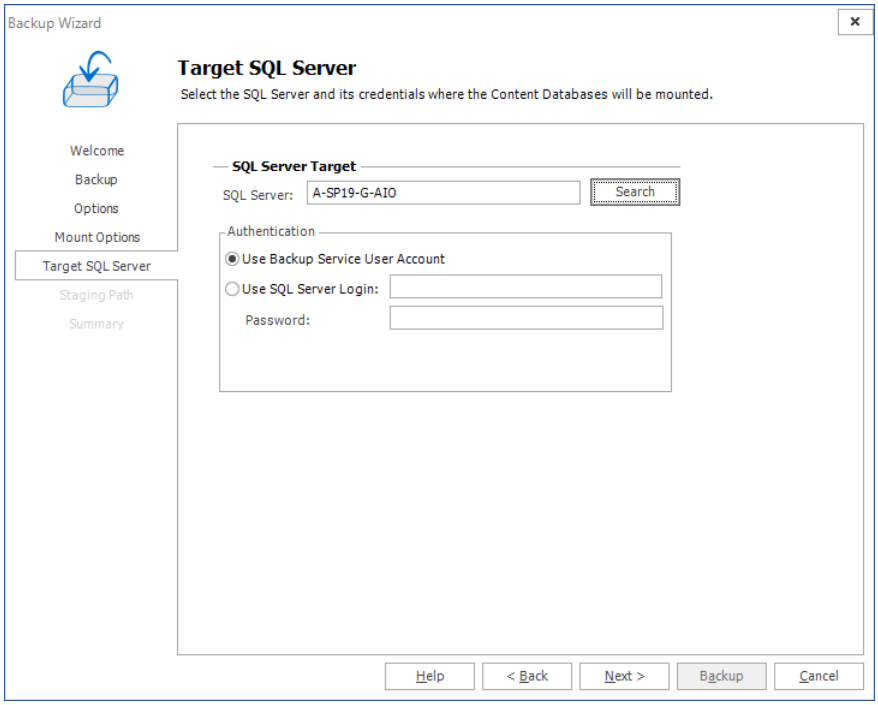
h. **Copy Only** - Select the check box to allow a full farm backup that does not interfere with the conventional backup/restore sequence of SQL Server backups. This option is normally used if SQL Server backups are already being taken separately.



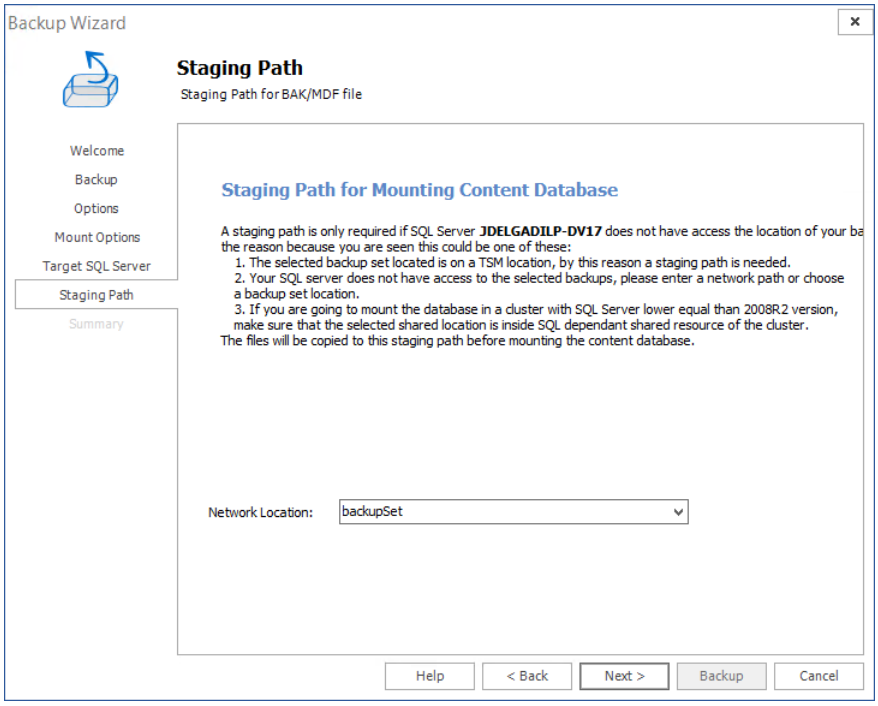
9. Click **Next**. The **Mount Options** step appears. Select which content database, if any, you would like the backup to mount.



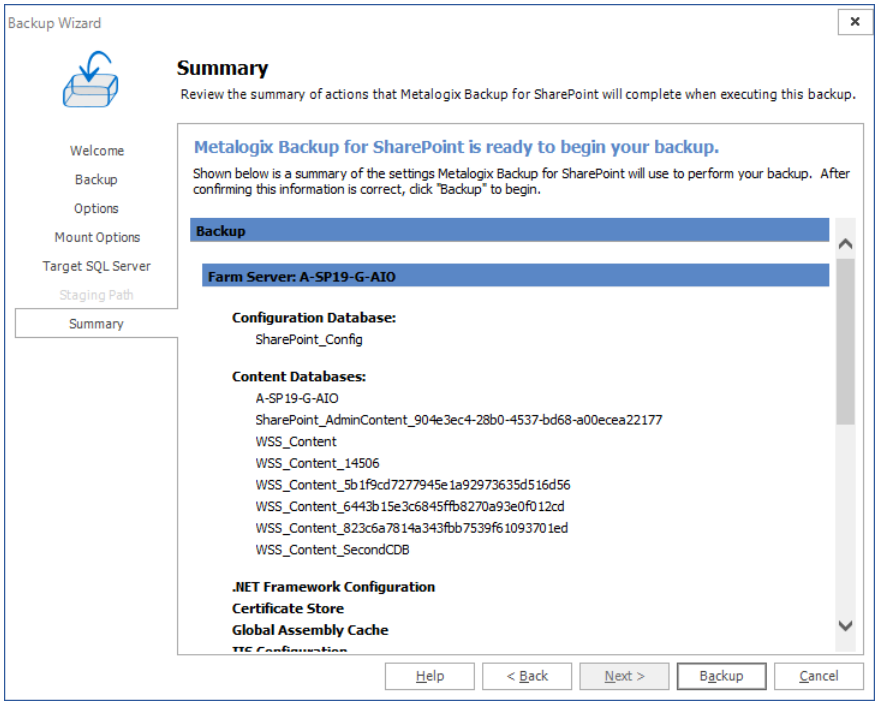
10. Click **Next**. If you did not choose a content database in the previous step, **Target SQL Server** step is ignored. If you chose a content database in the previous step, then the **Target SQL Server** step appears. Enter the information for the server on which you want to mount the backup.



11. Click **Next**. The **Staging Path** step appears only if a TSM location is selected as the Backup Set Location in the **Options** step.



12. The **Summary** step appears. Review the information and click **Backup** to start the backup.

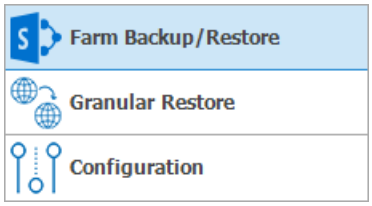


Scheduling a full or differential farm backup

Only users who are members of the farm administrators group can perform farm backups. For information about the components that you can back up, see Using Metalogix Backup for SharePoint in your disaster recovery plans.

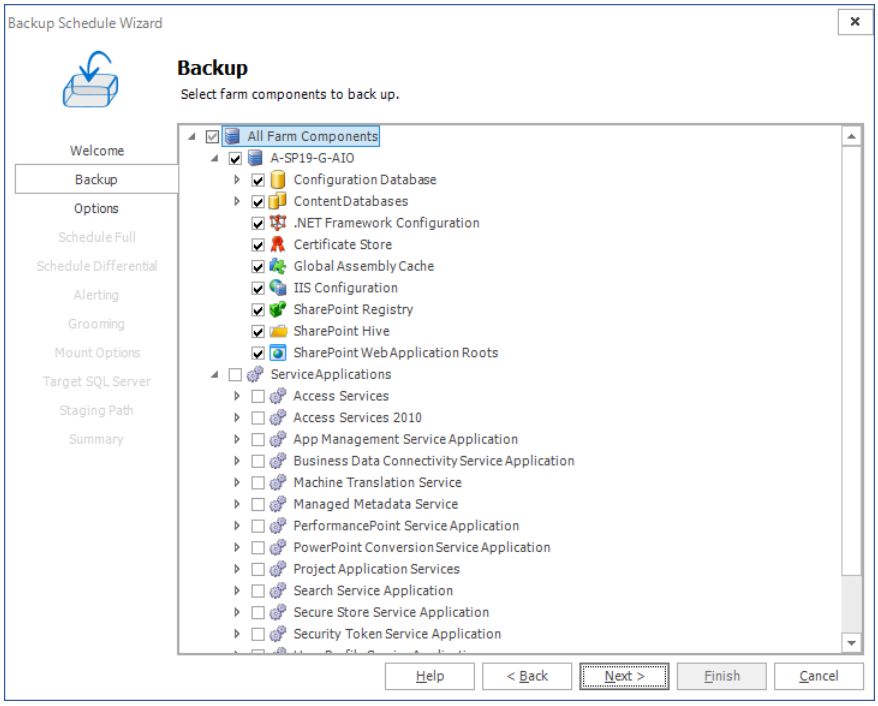
How do I schedule a full or differential farm backup?

1. From the Management Console workspace selector click **Farm Backup/Restore**.

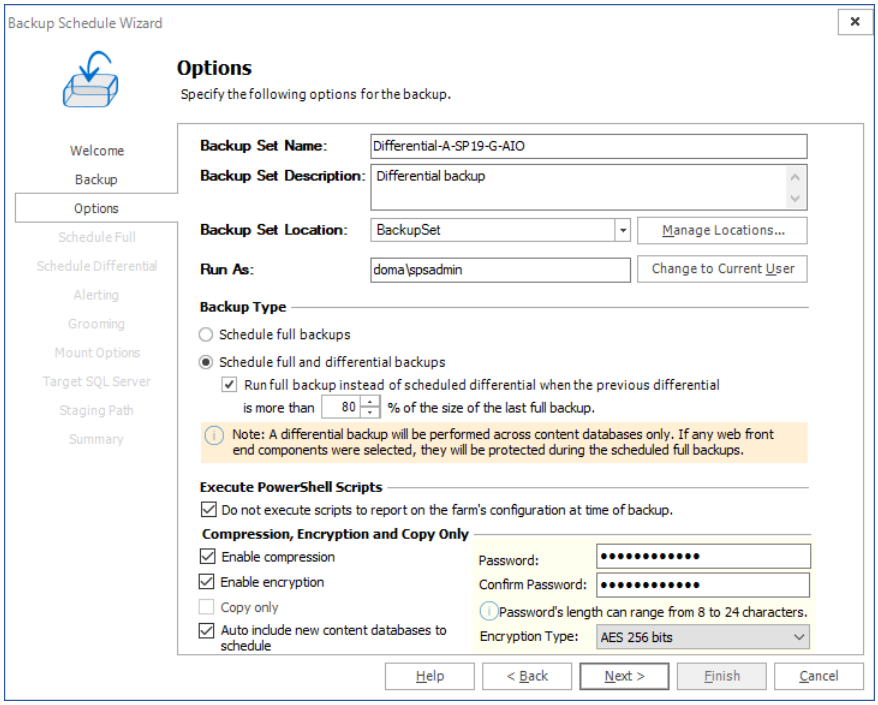


2. In the Farm Backup/Restore pane, click any server name or **All Servers** for any farm.
3. Click the **Backup** tab.
4. In the **Select farm components to back up** pane, select the check boxes for the items to include in the backup. From the ribbon, you can perform the following actions:
   a. Click the **Select All** to select all farm components.
   b. Click **Unselect All** to clear the selection of farm components.
   c. Click **Refresh** to get the latest set of farm components.
5. From the ribbon, click **Schedule a Backup.** The **Backup Schedule Wizard** starts.

6. On the **Welcome to the Backup Schedule Wizard** page, click **Next**.
7. On the **Backup** page, review the items that the backup includes. You can review and revise the farm component selections here.



8. Click **Next**. The **Options** step appears.



Enter the information as described below:

a. **Backup Set Name** - The name of the backup set. The name is required. The name can be up to 255 characters long. The name appears on the Restore tab when you select the backup set to review and restore. Metalogix Backup for SharePoint creates a corresponding backup set folder

in the file system for the backup set. The folder uses an internal identifier name that is not the same as the name that you specify.

b. **Backup Set Description** - Provides additional information about the backup set. Use this optional property to document details that helps you select the correct backup set during restore operations and general administrative activities.

c. **Backup Set Location** - You can specify where Metalogix Backup for SharePoint stores the backup set. Click Manage Locations to create a new location, or select an existing location from the drop-down list.

d. **Run As** - You need to specify the user to run the backup as in the Run As field.

e. **Backup Type** - In the Backup Type area you need to select the type of backup to create on a schedule, you can select between Schedule Full Backups or Schedule full and differential backups. If you click Schedule full and differential backups, you can choose to perform a full backup in place of a differential backup when the differential backup size is larger than a percentage that you specify.

f. **Do Not Execute Scripts to Report on the Farm's Configuration at Time of Backup** - Select Do not execute scripts to report on the farm's configuration at time of backup in order to prevent Metalogix Backup for SharePoint from providing farm's configuration at the time of the backup. If this option is deselected, then users will be able to select the "view farm configuration" option for the backup set.

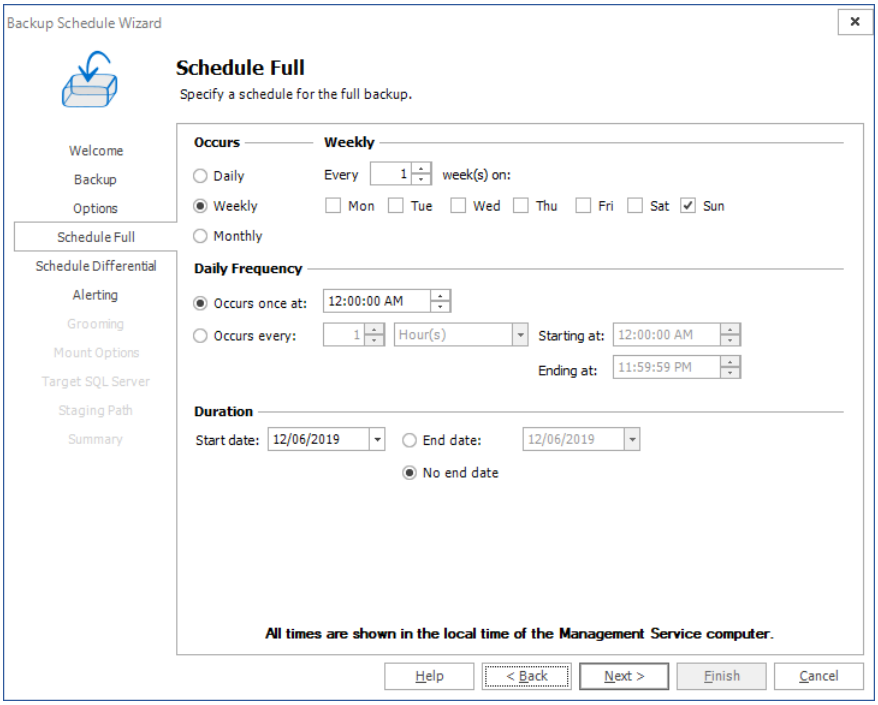
g. **Enable compression** - When selected, Metalogix Backup for SharePoint compresses the data in the backup set. Compressing the data makes the backup set smaller. Compressed data is also often faster to transfer on your network.

h. **Enable encryption** - When selected, Metalogix Backup for SharePoint encrypts the data in the backup set. You can select from two industry standard compression methodologies: **AES 128 bits** or **AES 256 bits**. Encrypted data can only be decrypted by Metalogix Backup for SharePoint. If you enable encryption, you must specify a password. When you restore from the backup set, you must provide the same password to decrypt the backup.

i. **Copy Only** - When selected, Metalogix SharePoint allows a backup to be taken that does not interfere with the conventional backup/restore sequence of SQL Server backups. This option is normally used if SQL Server backups are already being taken separately from Backup, and Backup should not interfere in the existing process.

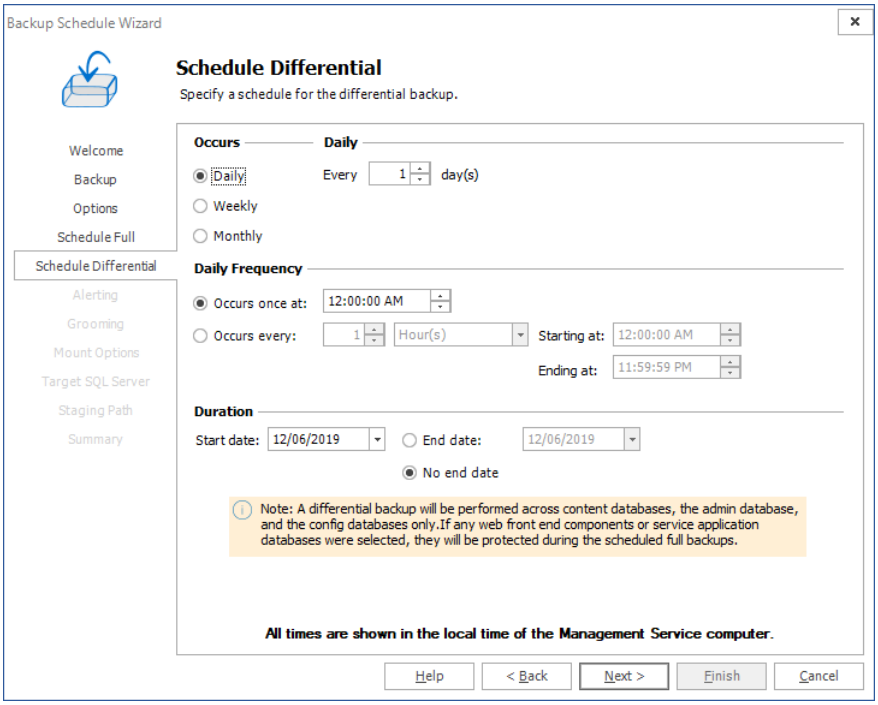
j. **Auto Include New Content Databases to Schedule** - Select the Auto include new content databases to schedule, option in order to automatically include all new content databases to the scheduled backup.

9. Click **Next**. The **Schedule Full** step appears. This step appears if in the previous step, you either opted to schedule a full farm backup or you selected to run a full farm backup in place of a differential backup when the differential backup size is larger than a percentage that you specified.



Specify the schedule from Daily, Weekly or Monthly. Specify the frequency of occurrence and specify the duration. Both the Management Service and the Backup Service must be running to start a backup operation. The time and date you specify identifies when to start the backup operation. If you specify an end date and time, Metalogix Backup for SharePoint does not start a new operation after that time. Any running backup operations continue to run.

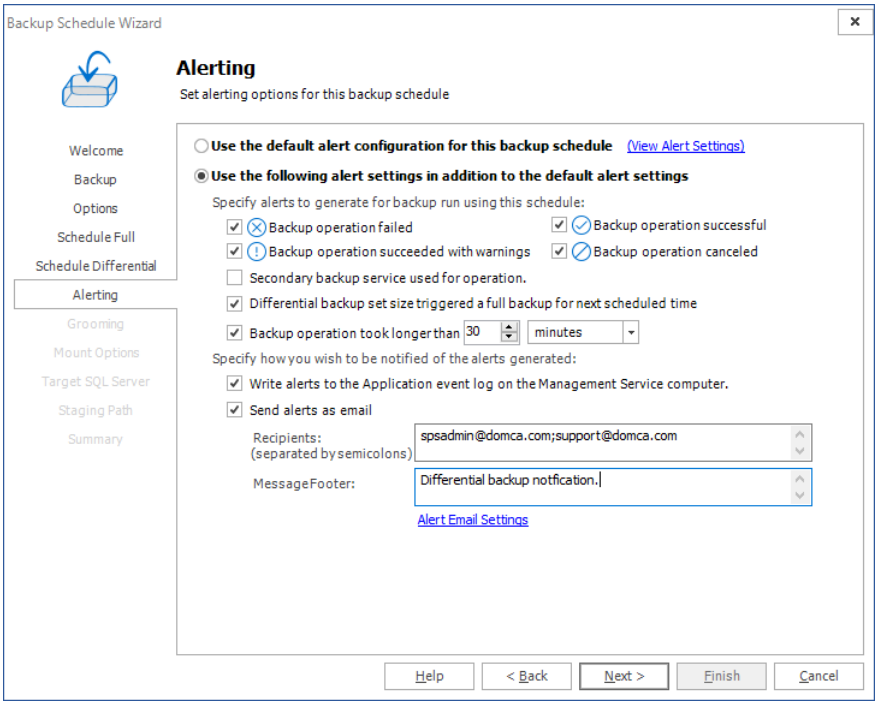
10. Click **Next**. The Schedule Differential step appears.



Specify the schedule from Daily, Weekly or Monthly. Specify the frequency of occurrence and specify the duration. Both the Management Service and the Backup Service must be running to start a backup operation. The time and date you specify identifies when to start the backup operation. If

you specify an end date and time, Metalogix Backup for SharePoint does not start a new operation after that time. Any running backup operations continue to run.

11. Click **Next**. The **Alerting** step appears.



12. Select one of the following:

- **Use the default alert configuration for this backup schedule.**
- **Use the following alert settings in addition to the default alert settings.** If you select this option, you can specify how any of the following conditions affect alerts. These settings are used in addition to the default alert settings:

a. **Backup operation failed** - When selected, Metalogix Backup for SharePoint generates an alert when an operation fails.

b. **Backup operation succeeded with warnings** - When selected, Metalogix Backup for SharePoint generates an alert when a backup or restore operation succeeds but encounters errors.

c. **Backup operation successful** - When selected, Metalogix Backup for SharePoint generates an alert when an operation succeeds. Backup, restore, and preview operations can all generate Successful alerts.

d. **Backup operation canceled** - When selected, Metalogix Backup for SharePoint generates an alert when a user cancels a backup or restore operation.

e. **Secondary Backup Service used for the operation** - When selected, Metalogix Backup for SharePoint generates an alert if it uses a secondary Backup Service to perform a backup.

f. **Differential backup set size triggered a full backup for the next scheduled time** - When selected, Metalogix Backup for SharePoint generates an alert when the size of a differential backup triggers a full backup during the next scheduled backup. You specify when the differential backup size triggers a full backup when you create the scheduled backup.

g. **Backup operation took longer than <number> <unit>** - When selected, Metalogix Backup for SharePoint generates an alert when a backup takes longer than the amount of time that you specify.

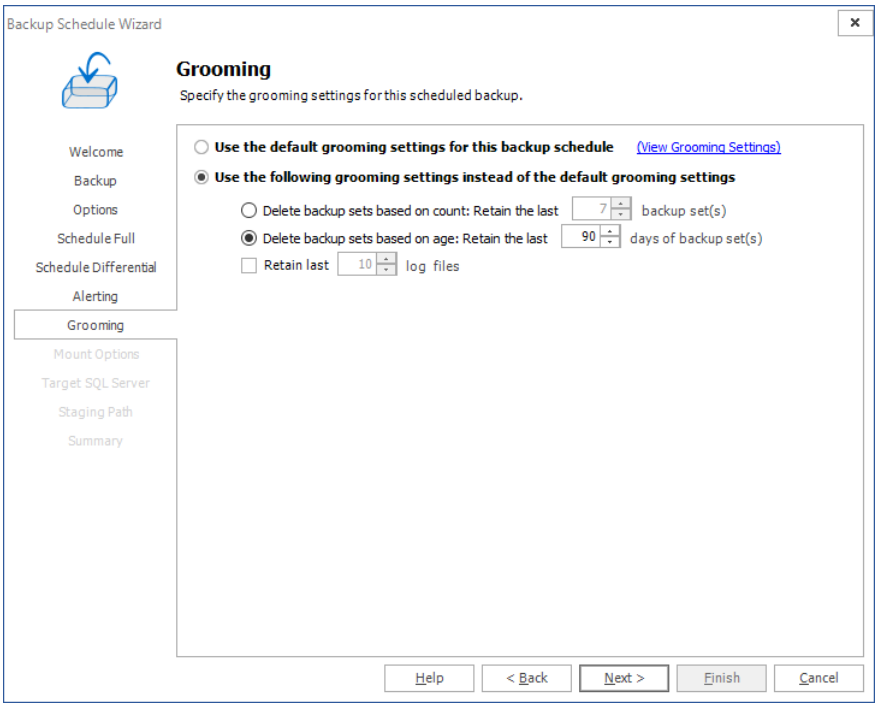
h. **Write alerts to the Application event log on the Management Service computer** - When selected, Metalogix Backup for SharePoint notes alerts generated by the scheduled backup in the Application event log on the computer that hosts the Management Service. You can use the Windows Event Log viewer to review the event log.

i. **Send alerts as email** - When selected, sends any alerts generated by the scheduled backup as an email to the recipient or recipients that you specify. For emails to be sent successfully, the SMTP server must be setup. Click **Alert Email Settings** to verify that the SMTP settings have been configured.

   Recipients - The SMTP email addresses of one or more recipients to send alerts generated by the scheduled backup. You can click Alert Email Settings to configure the outgoing SMTP mail server.

   Message Footer - Text included in the generated email below the alert.

13. Click **Next**. The **Grooming** step appears.



14. Select one of the following:

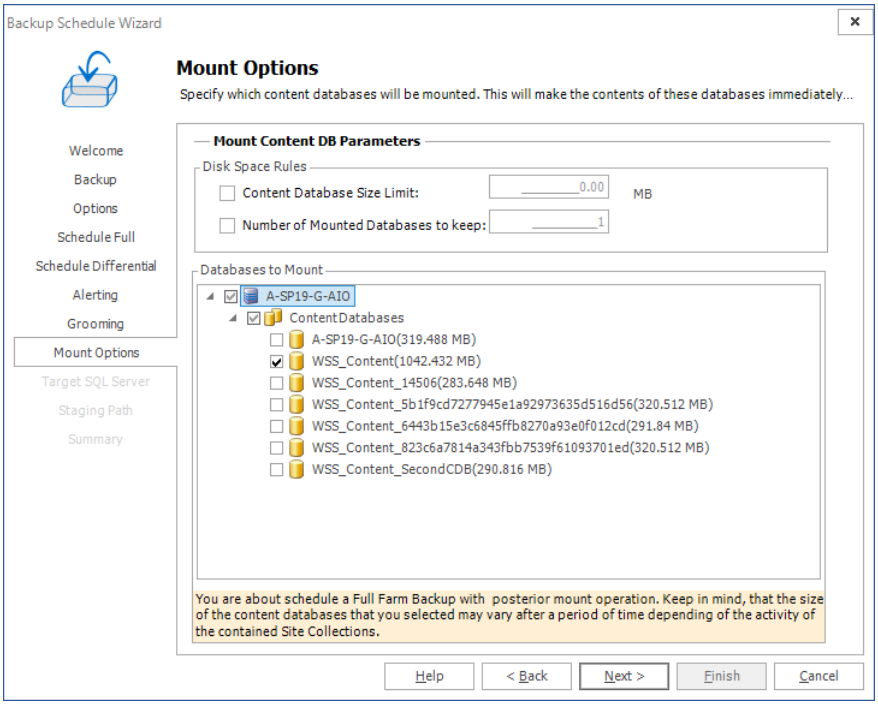
- Use the default grooming settings for this backup schedule.
- Use the following grooming settings instead of the default grooming settings. When you select this option you can specify when and how Metalogix Backup for SharePoint deletes out-of-date backup sets from the repository database and the storage location that you specify. For more information about grooming, see Learning about data grooming. You can specify the following settings, which replace the default grooming settings:

a. **Retain last x good backup set(s)** - When selected, Metalogix Backup for SharePoint always saves at least the number of backup sets that you specify, without regard to the age of the sets. When you enable both this setting and the "Delete backup sets from repository and disk after x days" settings, the oldest retained set may be older than the age that you specify.

b. **Delete backup sets from repository and disk after x days** - When selected, Metalogix Backup for SharePoint deletes the data after the specified number of days.

c. **Retain last x log files** - When selected, Metalogix Backup for SharePoint always saves at least the number of log files that you specify, without regard to the age of the log file.

15. Click **Next**. The **Mount Options** step appears.



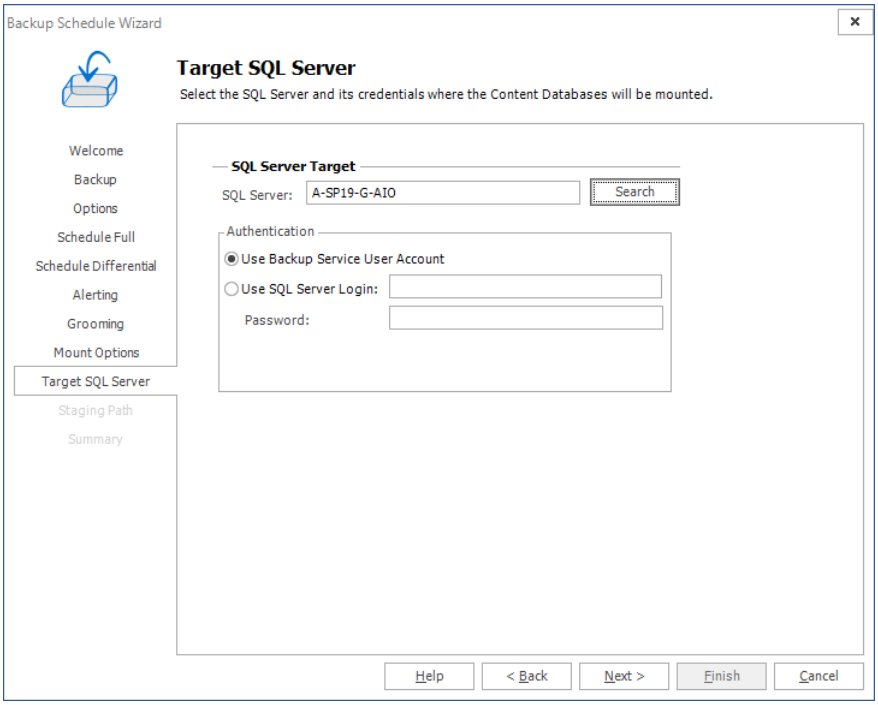
Set the following optional parameters:

a. **Content Database size limit** - prevents the backup from being mounted if the content database exceeds the specified size. Note that setting a limit of 0MB means that there is no size limit and all backups will be mounted to the selected content databases.

b. **Number of Mounted Databases to keep** - allows you to specify the number of backups sets that are kept mounted. Specifying a value of 1 will keep the latest scheduled backup mounted.

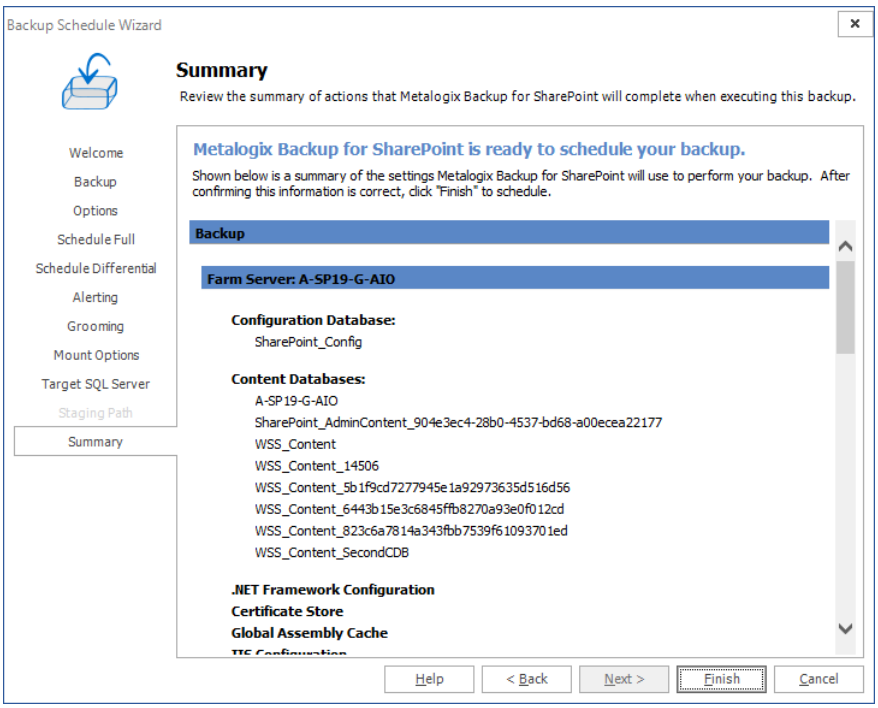
c. **Databases to Mount** - select which content databases will be mounted. Selecting a content database for mounting will make the content database immediately available for granular restores.

16. Click **Next**. The **Target SQL Server** step appears if a Content Database was selected to be mounted in the previous step.



The Target SQL Server step lets you select the SQL Server location where the content databases will be mounted. Once you have selected the Target SQL Server location, select the authentication type, and enter credentials when needed.

17. Click **Next**. The **Summary** step appears. Review the information and click **Finish** to schedule the backup.



Managing scheduled farm backups

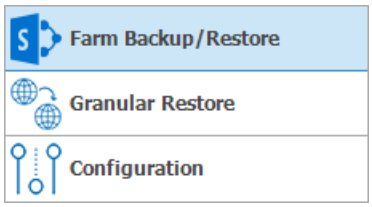
The Scheduled Backups tab in the Management Console lets you view, edit, delete, enable, and disable scheduled farm backups.

How do I view the scheduled farm backups?

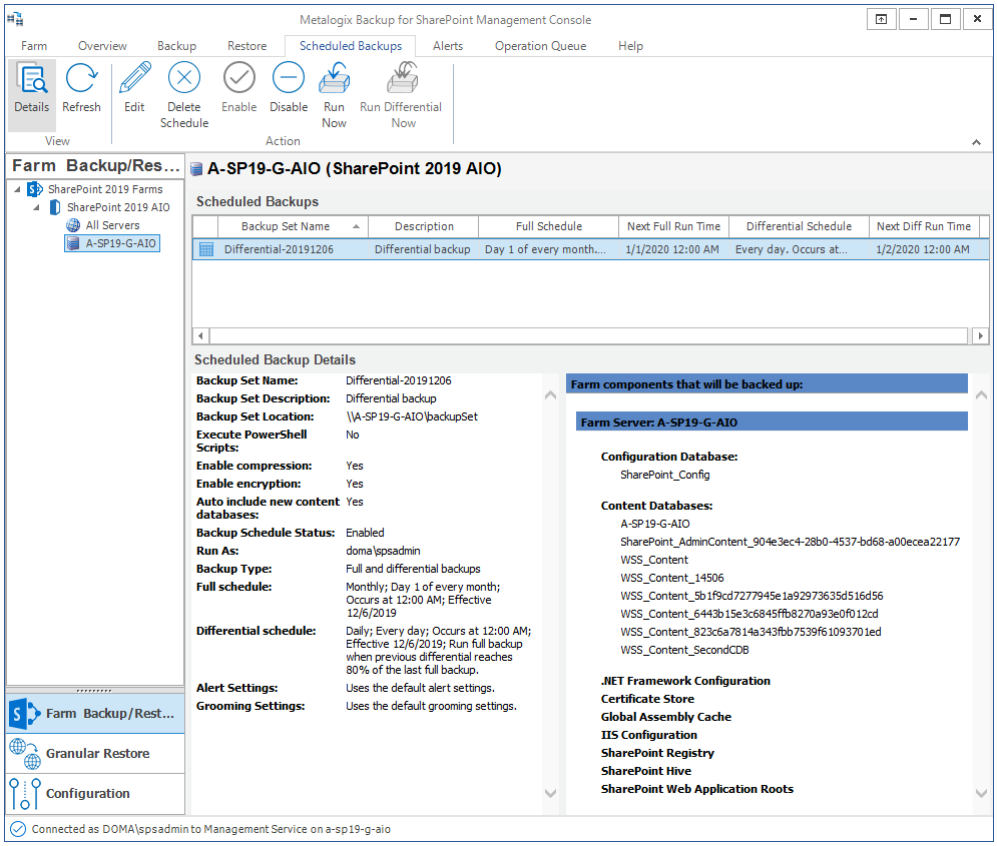
You use the Scheduled Backups tab in the Farm Backup/Restore view to view the existing backup schedules.

To view the scheduled farm backups

1. From the Management Console, in the left pane, click **Farm Backup/Restore**.



2. In the Farm Backup/Restore pane, click any server name or **All Servers** for any farm.
3. Click the **Scheduled Backups** tab.



How do I make changes to a scheduled farm backup?

You use the Scheduled Backups tab in the Farm Backup/Restore view to make changes to a scheduled backup.

To make changes to a scheduled farm backup

1. Select the scheduled backup that you want to edit.
2. From the ribbon, click **Edit**. The **Backup Schedule Wizard** starts.
3. Step through the wizard and revise the settings. For more information see Scheduling a full or differential farm backup.
4. Review the information in the **Summary** step and click **Finish** to schedule the backup.

How do I delete a scheduled farm backup?

You use the Scheduled Backups tab in the Farm Backup/Restore view to delete a scheduled backup. When you delete a scheduled backup, you only delete the schedule. The existing backups in the backup sets are not deleted.

To delete a scheduled farm backup

1. Select the scheduled backup that you want to delete.
2. From the ribbon, click **Delete Schedule**.
3. A confirmation dialog prompts you to confirm that you want to delete the Scheduled Backup. Click **Yes** to delete the scheduled backup.

How do I enable and disable a scheduled farm backup?

You use the Scheduled Backups tab in the Farm Backup/Restore view to temporarily disable and enable scheduled backups. When you disable a scheduled backup, the scheduled backup definition stays in Metalogix Backup for SharePoint, but it does not execute. You can disable a scheduled backup when you need to temporarily suspend backups, then later resume them.

To disable a scheduled farm backup

1. Select the scheduled backup that you want to delete.
2. From the ribbon, click **Disable**. The **Next Full Run Time** and **Next Diff Run Time** columns values for the selected backup schedule displays the scheduled time. The **Disable** icon in the ribbon is enabled.

To enable a disabled scheduled farm backup

1. Select a disabled scheduled backup that you want to enable.
2. From the ribbon, click **Enable**. The **Next Full Run Time** and **Next Diff Run Time** columns values for the selected backup schedule will change to **Disabled**. The **Enable** icon in the ribbon is enabled.

Restoring SharePoint farms

Metalogix Backup for SharePoint can restore SharePoint 2013, 2016, 2019 and Subscription Edition farms that have been previously backed-up using Metalogix Backup for SharePoint.

Metalogix Backup for SharePoint uses VSS to back up and restore the farm components that make up your SharePoint farm while your farm is in use. Your farm must be configured to use VSS. If VSS is not enabled, Metalogix Backup for SharePoint will not be able to back up your SharePoint 2013, 2016, 2019 and Subscription Edition farms. For information about how VSS works, please consult your Windows Server documentation, or the Microsoft article Volume Shadow Copy Service Overview at http://msdn.microsoft.com/en-us/library/aa384649(VS.85).aspx.

Only SharePoint 2013, 2016, 2019, and Subscription Edition farms can use Farm Backup/Restore.

Restoring from farm backups

The Restore tab of the Farm Backup/Restore view in the Management Console lets you restore backed-up SharePoint 2013, 2016, 2019 and Subscription Edition farm backups. Restorations can be done as in-place restores or out-of-place restores. An in-place restore returns the backed-up components to their original locations, replacing any existing files. Some components cannot be restored in-place, including the following:

- .NET framework configuration
- Certificate store
- Global assembly cache
- IIS configuration
- IIS Metabase
- SharePoint registry
- SharePoint root
- SharePoint Web application roots

In addition, you can only restore the SharePoint configuration databases as part of a complete restore of the farm.

For these components, it is not possible to guarantee that only Metalogix Backup for SharePoint is making changes to the files while the restore is in progress. If both Metalogix Backup for SharePoint and another process tried to write to the file at the same time, the result could be catastrophic for

your farm or for the server. The farm or the server could fail to function in this event. For this reason, Metalogix Backup for SharePoint prevents an in-place restore of the components.

You must restore these files out of place, then manually recreate the SharePoint farm configuration based on the files.

If you perform an in-place restore while your SharePoint farm is active and available to users, the users may encounter errors when they try to access content that Metalogix Backup for SharePoint is actively restoring. The content should be available after a short interval. If a user is viewing content or has the content checked out and Metalogix Backup for SharePoint restores the content, the version the user has may no longer be valid. Metalogix Backup for SharePoint restores the version of the content that was current during the backup, including the checkout state of the content.

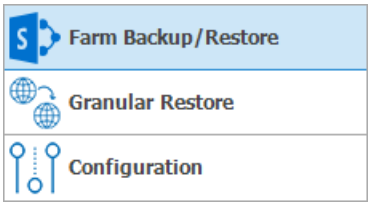
An out-of-place restore places the files in a UNC location that you specify. You can manually return the content to your SharePoint farm.

How do I select the backed-up components to restore?

You use the Restore tab in the Farm Backup/Restore view to select the components to restore.

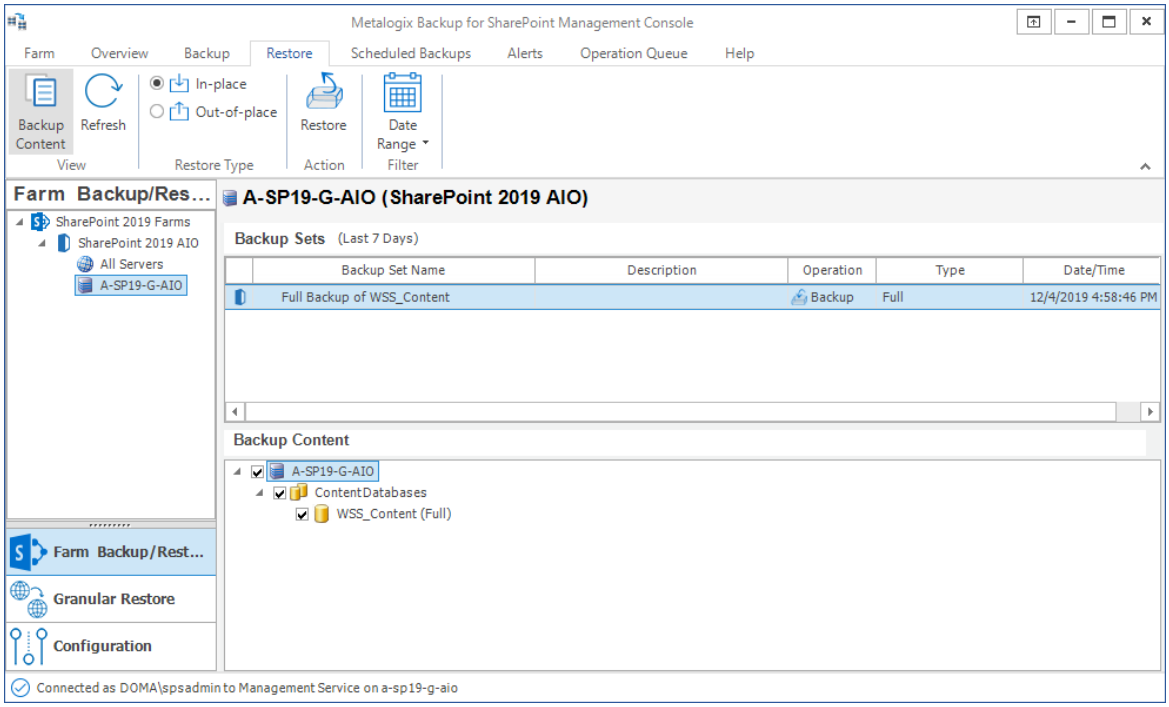
To select the components to restore

1. From the Management Console workspace selector click **Farm Backup/Restore**.



2. In the Farm Backup/Restore pane, click any server name or **All Servers** for any farm.
3. Click the **Restore** tab.

4. In the **Backup Content** pane, select the check boxes for the components to restore. If the **Backup Content** pane is not visible, click **Backup Content** in the ribbon.



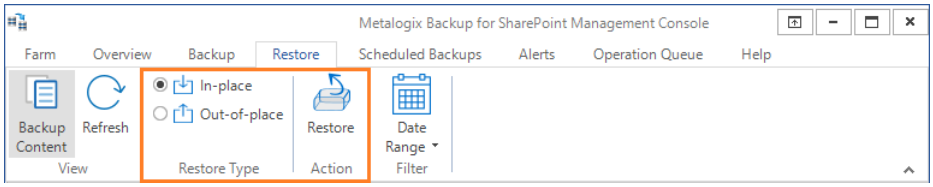
You can right-click any node in the Backup Content pane and choose from the following actions: **Select All**, **Unselect All**, **Expand Tree From Here** or **Refresh**.

How do I perform an in-place restore?

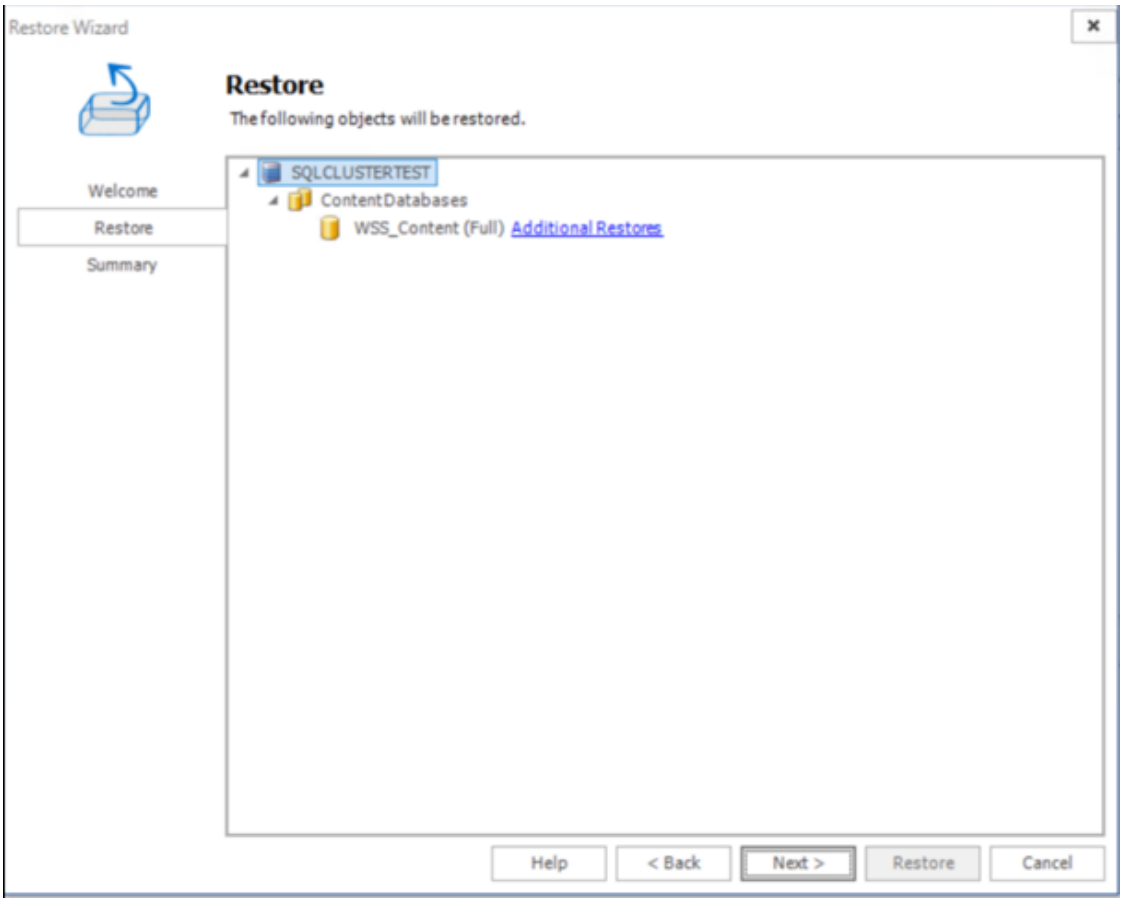
You use the Restore tab in the Farm Backup/Restore view to perform an in-place restore.

To perform an in-place restore

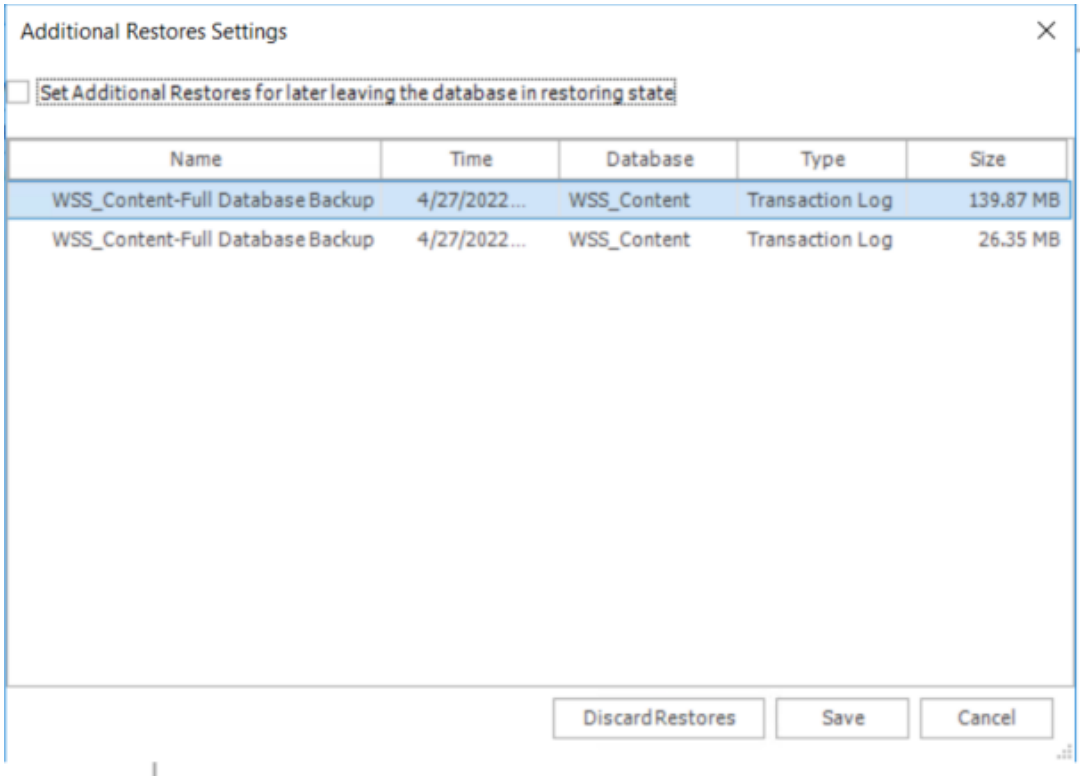
1. In the Management Console, in the left pane, click **Farm Backup/Restore**.
2. In the Farm Backup/Restore pane, click any server name or **All Servers** for any farm.
3. Click the **Restore** tab.
4. In the **Backup Content** pane, select the check boxes for the items to restore. If the Backup Content pane is not visible click **Backup Content** in the ribbon.
5. In the ribbon, select **In-place** and then click **Restore**. The **In-Place Restore Wizard** starts.



6. Click **Next** in the Welcome step of the In-Place Restore Wizard. The **Restore** step appears.



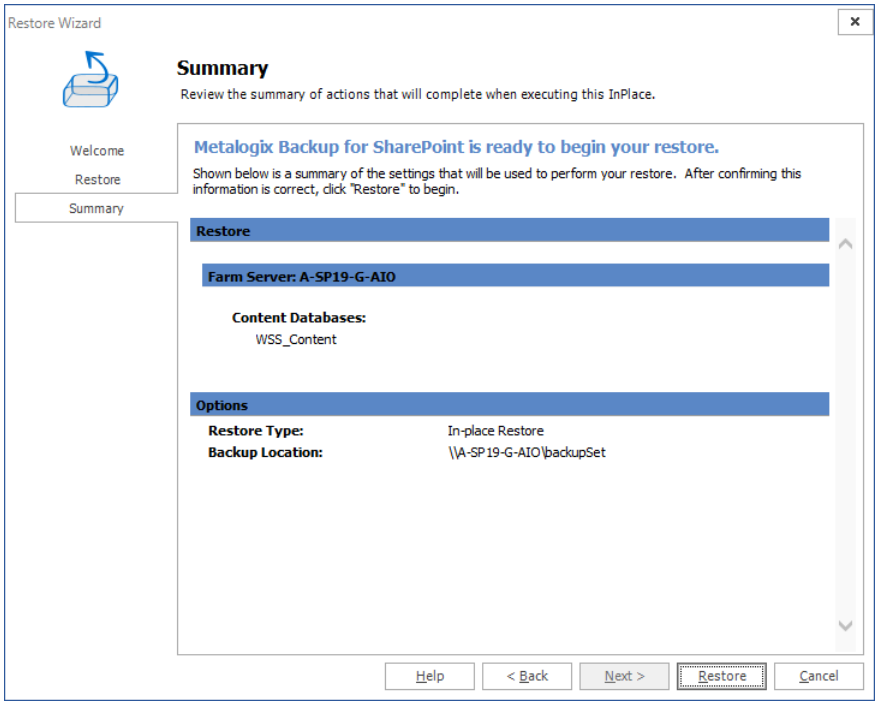
Additional Restores allows the restore to use Transactional Log Backups taken in SQL Management Studio for restoring the database from a full backup. This option will only be visible for In Place Restores. Click the Additional Restores link to open the interface.



- Check the box to set the Database to a Restoring state, allowing the user to restore from Transaction logs in SQL Management Studio, under Tasks.
- You can also select the name of the backup and click Save to restore from the Transaction Log.
- Discard Restores removes the transaction log backup from the Additional Resources window.

Transaction Log Information, including shrinking the file after restore, can be found here: [The Transaction Log (SQL Server) - SQL Server | Microsoft Docs]

7. Review the content to restore and then click **Next**. The **Summary** step appears.



8. Review the restore operation summary and then click **Restore**.

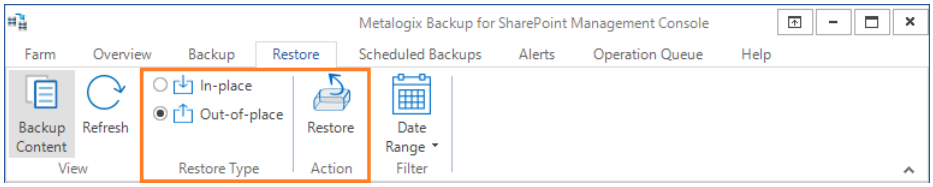
How do I perform an out-of-place restore?

You use the Restore tab in the Farm Backup/Restore view to perform an out-of-place restore.

To perform an out-of-place restore

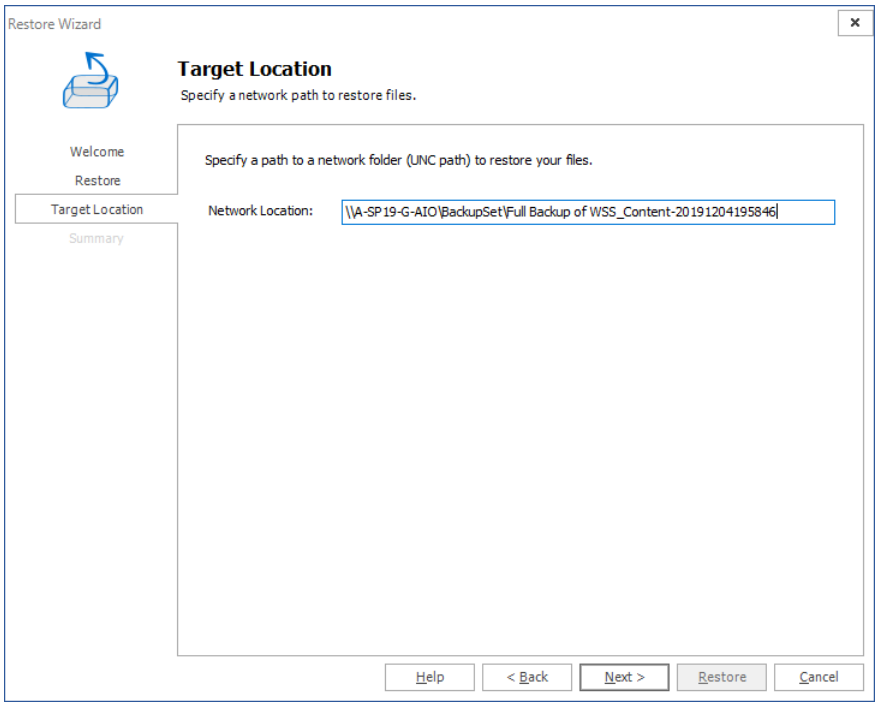
1. From the Management Console workspace selector click **Farm Backup/Restore**.
2. In the Farm Backup/Restore pane, click any server name or **All Servers** for any farm.
3. Click the **Restore** tab.
4. In the **Backup Content** field, select the check boxes for the items to restore. If the Backup Content pane is not visible click **Backup Content** in the ribbon.

5. In the ribbon, select **Out-of-place** and then click **Restore**. The **Out-Of-Place Restore Wizard** starts.



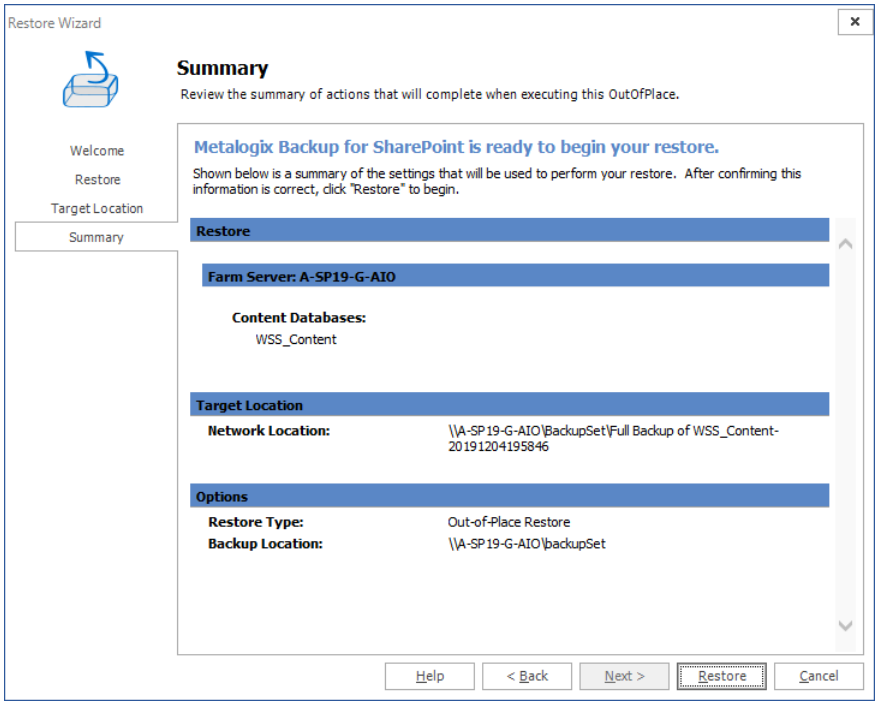
6. Click **Next** in the Welcome step of the Out-Of-Place Restore Wizard. The **Restore** step appears.

7. Review the content to restore and then click **Next**. The **Target Location** step appears.



In the Network Location field, enter a UNC location where Metalogix Backup for SharePoint should place the restored content.

8. Click **Next**. The **Summary** step appears.



9. Review the restore operation and click **Restore**.

Viewing the farm configuration

The Metalogix Backup for SharePoint Farm Configuration browser allows you to examine the XML files that define the configuration settings for your SharePoint 2013, 2016, 2019 and Subscription Edition farm. You can examine the configuration settings for any backup that includes the SharePoint configuration files.

How do I examine the configuration settings in a backup?

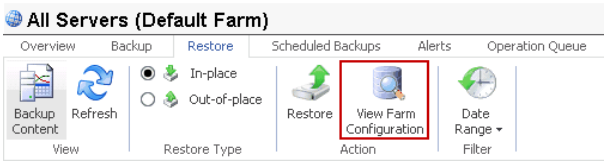
Use the Restore tab in the Farm Backup/Restore view to view the configuration settings.

> **NOTE:** This feature will be available if the **Do not execute scripts to report on the farm's configuration at time of backup** option was unchecked in the **Option** step of the Backup Wizard.

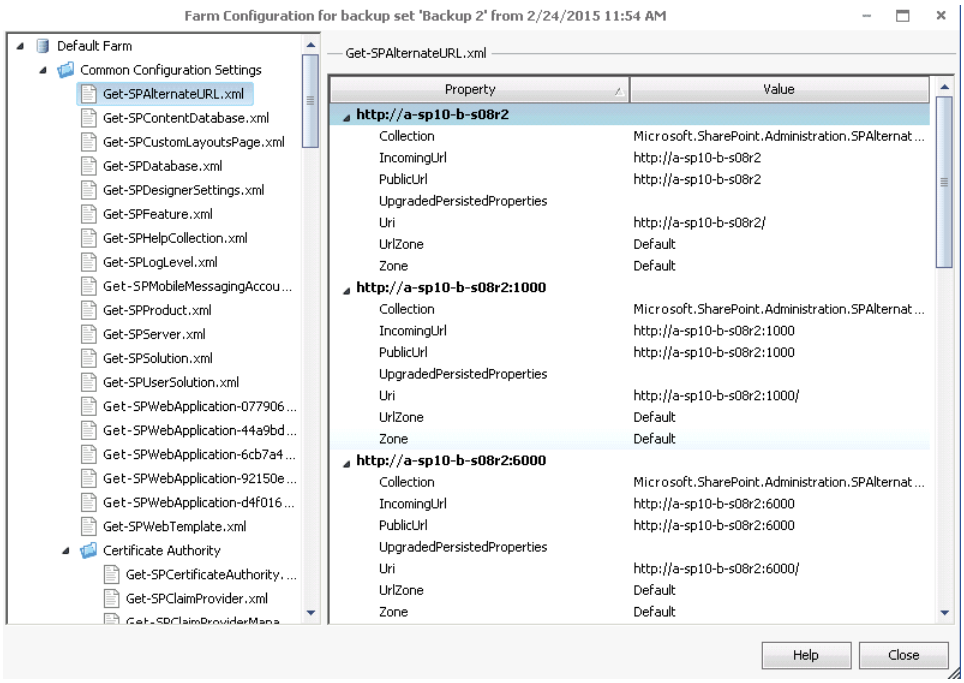
Steps to view the configuration settings

1. From the Management Console workspace selector click **Farm Backup/Restore**.
2. In the Farm Backup/Restore pane, click any server name or **All Servers** for any farm.
3. Click the **Restore** tab.

4. In the **Backup Sets** list, click the name of any backup set that includes a SharePoint configuration database.
5. The **Backup Content** field lists the contents of the backup set. If the **Backup Content** pane is not visible, click **Backup Content** in the ribbon.
6. In the ribbon, click **View Farm Configuration**. If this option is disabled, then clear the **Do not execute scripts to report on the farm's configuration at time of backup** check box from the Backup Wizard.



7. In the Farm Configuration window, select the XML file that you want to view.



7

Restoring granular objects

Metalogix Backup for SharePoint can back up SharePoint objects from SharePoint 2013, 2016, 2019 or Subscription Edition farms. Backups can be run on demand, or on a schedule that works best for the farm.

The initial backup should always be a full backup. This enables subsequent backups to be either full backups like the initial backup, or smaller, differential backups which will only contain objects that have changed since the last full backup. The backups can then be used to reinstate SharePoint farms as needed.

Although Metalogix Backup for SharePoint no longer creates granular backups, granular backups created using previous versions of SharePoint backup can be used to restore SharePoint objects. It is important to note that granular objects can only be restored to the same version of SharePoint from which the granular backup was initially created.

Viewing the granular restore status and results

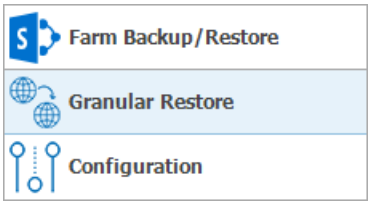
The Overview tab displays the status of each backup, mount, link, or restore operation. Metalogix Backup for SharePoint combines the specified Filter options to determine which operations to display in the Backup/Import and Mount/Restore Operation Status list. The Operation Details pane provides additional information about the operation selected in the Backup/Import and Mount/Restore Operation Status list.

How do I open the Overview tab?

The Overview tab is part of the Farm Backup/Restore and Granular Restore views in the Management Console. The Overview page applies to the selected farm.

To open the Overview tab

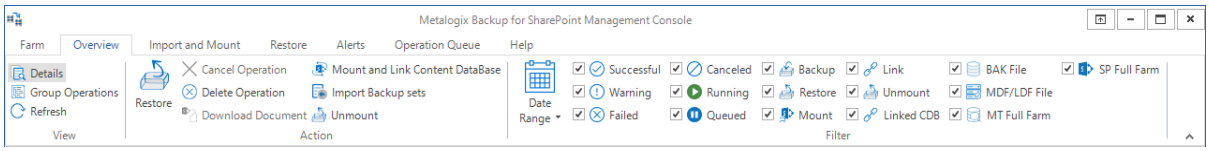
1. From the Management Console workspace selector select **Granular Restore**.



2. From the **Granular Restore** pane, select All Servers or a mounted database.
3. Click the **Overview** tab.

What actions can I perform in the Overview tab?

You perform the following actions in the Overview tab:



Details - You can view or hide the Operation Details pane by clicking Details in the top panel.. The details pane includes additional information about the selected operation.

Group Operations - You can choose to group operations in the status field by selecting Group Operations. When you group operations, differential backups are attached to the related full backups.

Refresh - You can manually refresh the operation status field by clicking Refresh.

Restore - When you select a backup operation in the status area, you can click Restore to restore the backed-up data.

Cancel Operation - When you select a running operation, you can click Cancel Operation to stop the operation.

Delete Operation - When you select an operation, you can click Delete Operation to delete the operation from the status list.

Download Document - You an select a document from the Backup Content tab in the Operation Details section, and view the document when you click Download Document.

Mount and Link Content database - You can start the Content Database Mount and Link Wizard to mount backup files or link content databases.

Import Backup sets - You can download backup sets from predefined backup set locations.

Filter data in the status field - You can select or clear the check boxes in the Filter area to control the items that appear in the status field. You can also filter the result in the status field by date range.

What actions can I perform in the Operation Queue tab?

You perform the following actions in the Operation Queue tab:

Details - You can view or hide the Operation details pane. The details pane includes additional information about the selected operation. In order to view or hide the Operation details pane, click Details in the top panel. For more information, see What information does the details pane include?

Refresh - You can manually refresh the operation status field.

Cancel Operation - When you select a queued operation, you can click Cancel Operation to stop the operation.

How can I open the Operation Details pane?

The Details pane normally appears at the bottom of the Overview tab. If the Details pane does not appear at the bottom of the window, you can make it visible using the following steps.

To display the Operation Details pane

1. From the Management Console workspace selector click either **Granular Restore** or **Farm Backup/Restore**.
2. In the top left hand panel click either **All Servers** or **Mounted Databases**.
3. In the right pane, click the **Overview** tab.
4. If the **Operation Details** pane does not appear, click **Details**.

What information appears in the Operation Details pane?

The Details pane displays the following information:

Summary - A brief summary of the selected operation. The summary includes the operation type, the operation status, the backup set name and location, the user credentials used, the Backup Service that performed the operation, and the directory where the backup set was saved after a successful operation

Server Operations - The Server operations, including the servers name, the progress of the operations, its size and start time.

Backup content - The content that was backed-up or restored. The content appears in a collapsed tree view

Result Text - The results of the backup or restore operation. This includes specific details regarding successes and failures.

Description - The description of the selected item that you entered when you created the item.

Canceling running granular backup or restore operations

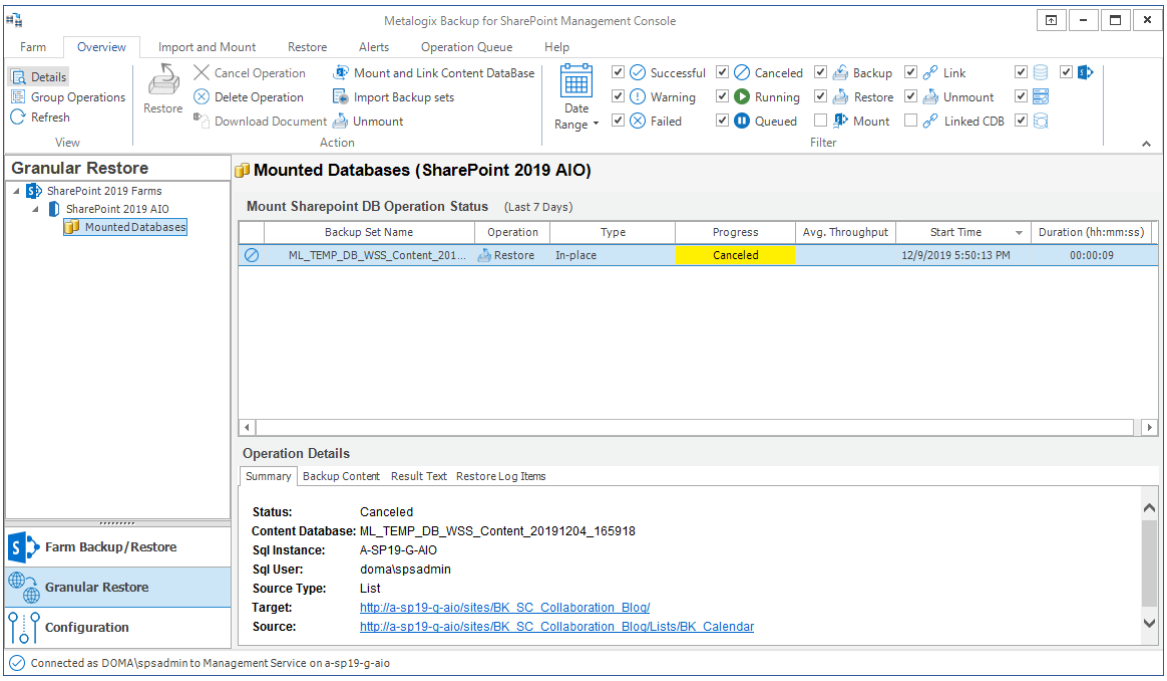
You can cancel any currently-running restore operation in Metalogix Backup for SharePoint. If you cancel a running operation that started on a schedule, Metalogix Backup for SharePoint does not cancel the schedule.

How do I cancel a running restore?

Use the Management Console to cancel a running operation.

To cancel a running backup or restore operation:

1. From the Management Console workspace selector click **Granular Restore** for a granular restore operation.
2. In the granular Restore pane, click the node with the running operation.
3. Click the **Operation Queue** tab in the top panel.
4. Select the restore operation you would like to cancel and click **Cancel Operation**.
5. In the confirmation dialog that opens, click **OK**.
6. Click the **Overview** tab. The canceled operation is listed in the **Mount Sharepoint DB Operation Status** list if the **Canceled** filter setting in the ribbon is checked.



7. The details of the canceled operation are displayed in the **Operation Details** pane. If no details are visible, click **Refresh**.

Mounting and Linking a Content Database

There are two ways to restore SharePoint objects - by mounting a content database that contains the object(s) to restore, and by creating a link to an already-mounted content database. From there, components can be granular-restored. Older versions of Metalogix Backup for SharePoint enabled users to create their own granular backups. These backups can be used to restore objects as well.

Mounting or linking content databases is done through the use of the Mount and Link Content Database Wizard. The wizard mounts content databases from BAK files, MDF/LDF files, Metalogix Farm Backups or SharePoint Full Farm Backups, or creates a link to a content database that has already been mounted. This operation allows you to copy the selected files to a staging location if the Backup Service does not have permission to access these files. The following are the mount source types:

- Metalogix Full Farm Backup
- SQL Server Backup (BAK) File - including full, differential, and transaction log
- SQL Server Data and Log (MDF/LDF) File
- SharePoint Full Farm Backup
- Link to Content Database

If you use a staging path while mounting a content database, the staging path used must be located on a machine where the Backup Service user is a local administrator, otherwise you cannot mount the database.

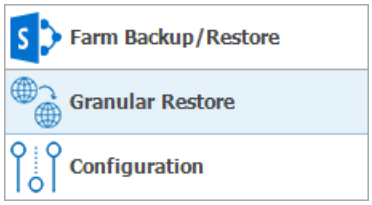
NOTE: The SQL server Backup Service is used to mount content databases by default. To allow other Backup Services (such as the primary or secondary Backup Service) to perform the mount instead, reorder the preferred mounting services using the "priorityMountOperation" key in the PBManagementService configuration file accordingly.

Mounting Metalogix Full Farm Backup

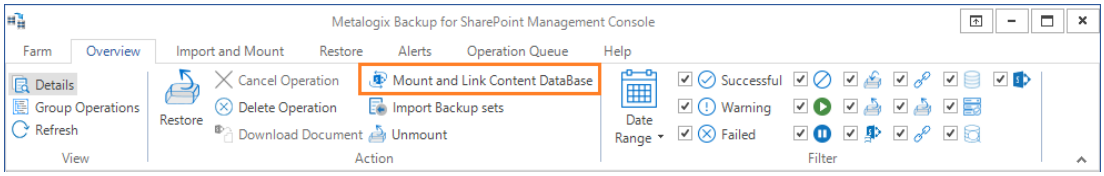
The Full Farm Backup option allows you to mount content databases on farm backups that have been taken by the Metalogix Backup for SharePoint product.

To mount a Full Farm Backup, do the following:

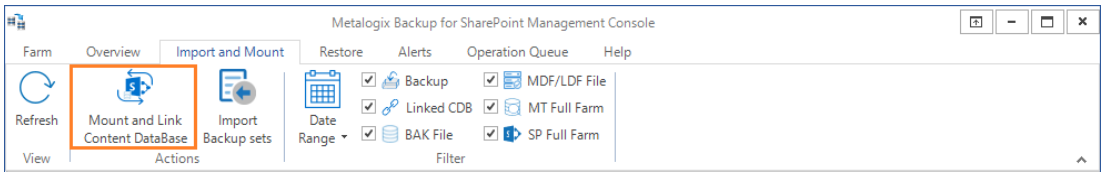
1. From the Management Console workspace selector click **Granular Restore**.



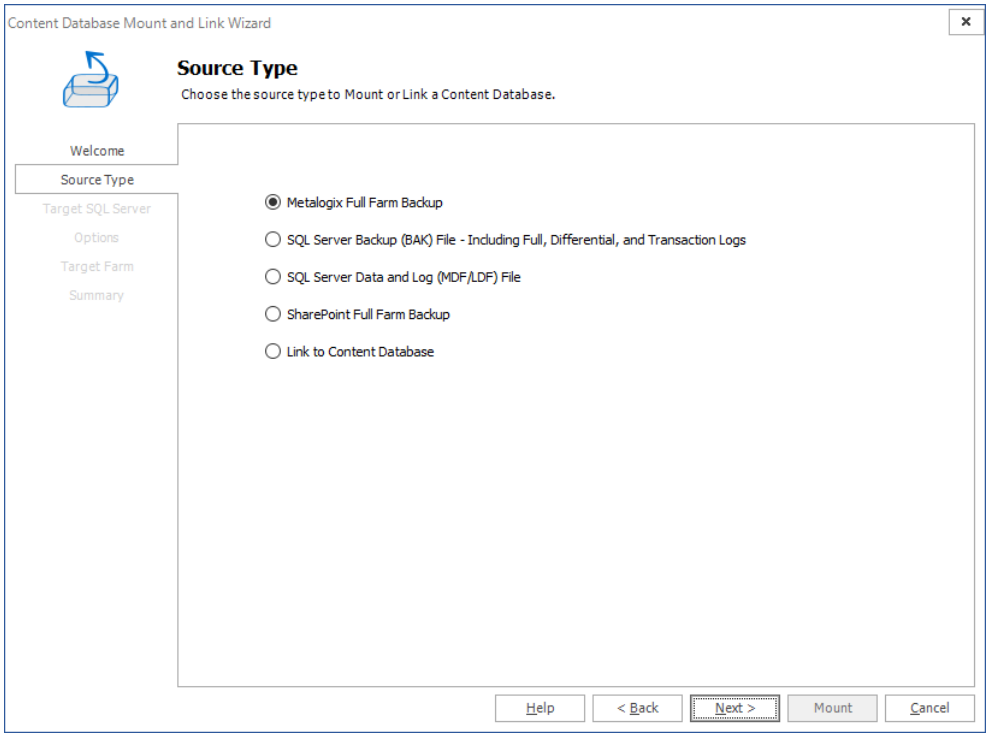
2. Launch the *Content Database Mount and Link Wizard* by doing one of the following:
   - Click the **Overview** tab and then click **Mount and Link Content Database** from the ribbon.



- Click the **Import and Mount** tab and choose the **Mount and Link Content Database** from the ribbon.

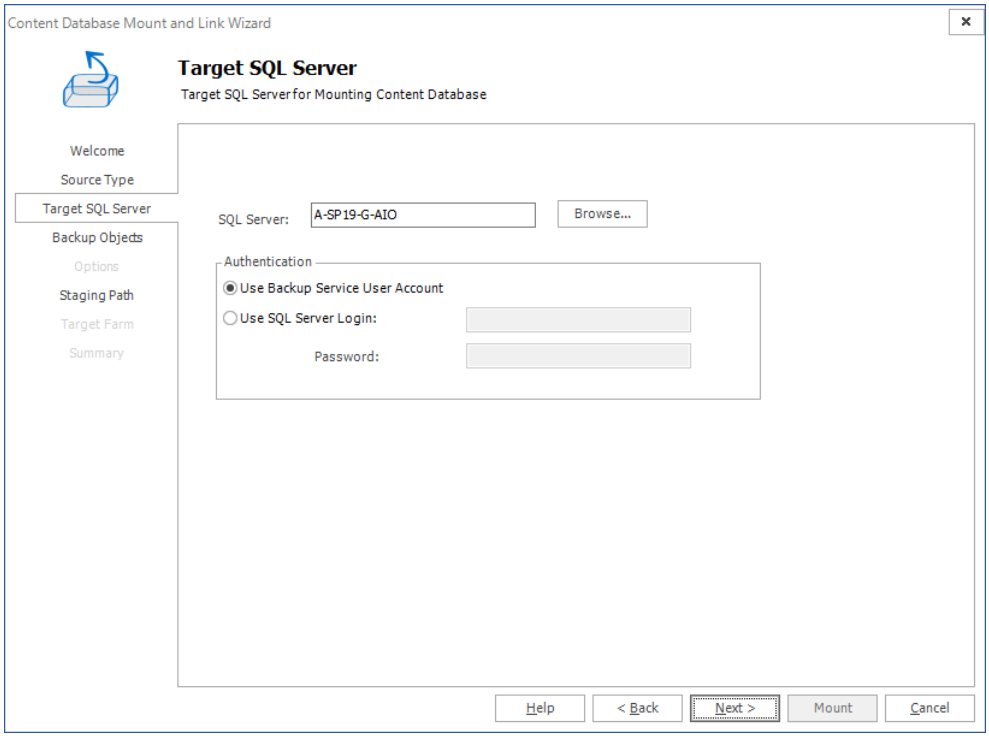


3. Click **Next** in the *Content Database Mount and Link Wizard Welcome* step. The **Source Type** step appears.



4. Select **Metalogix Full Farm Backup** as the content database source type.

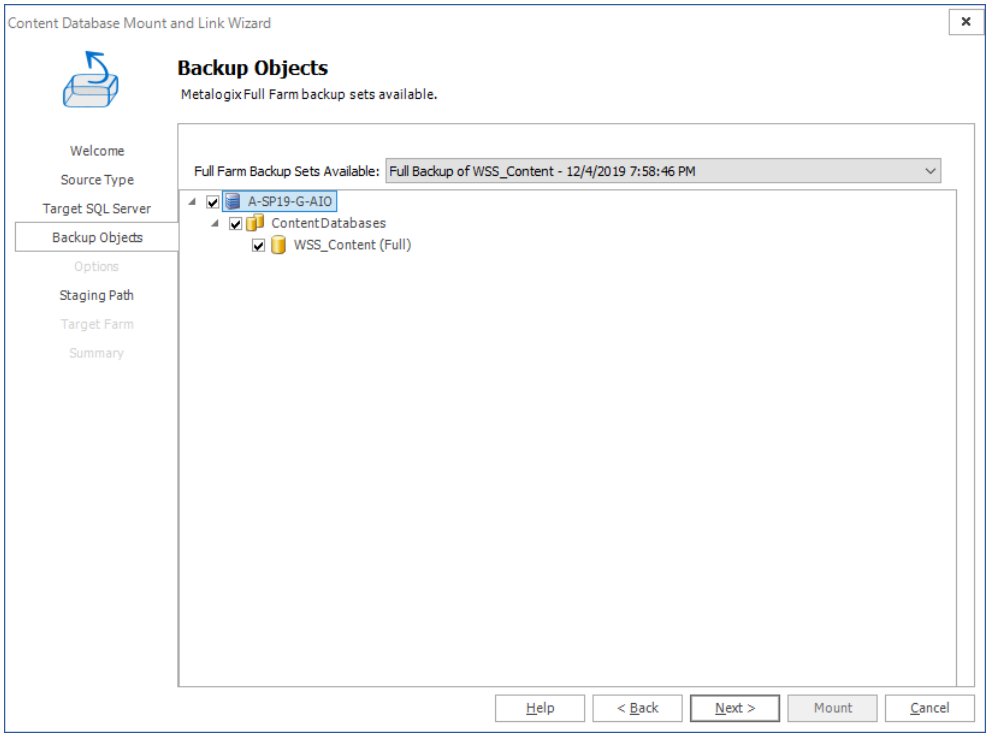
5. Click **Next**. The **Target SQL Server** step appears.



   a. Enter the name of a SQL Server, or click **Browse** and select a SQL Server.

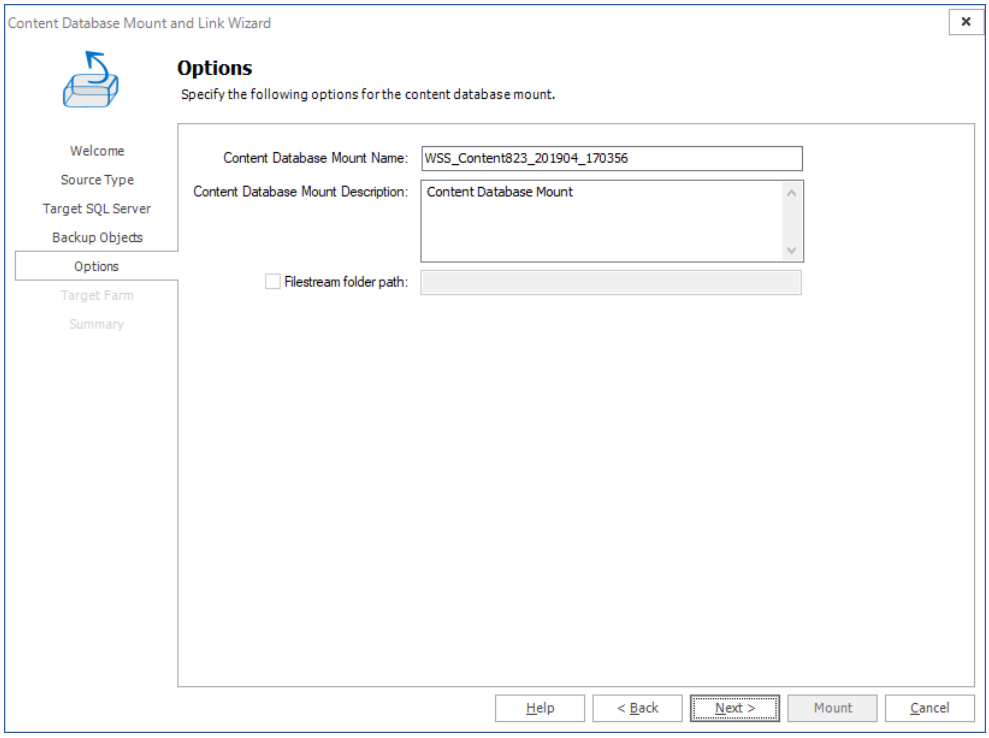
   b. For authentication, either use the Backup Service credentials or enter the server's credentials.

6. Click **Next**. The **Backup Objects** step appears.



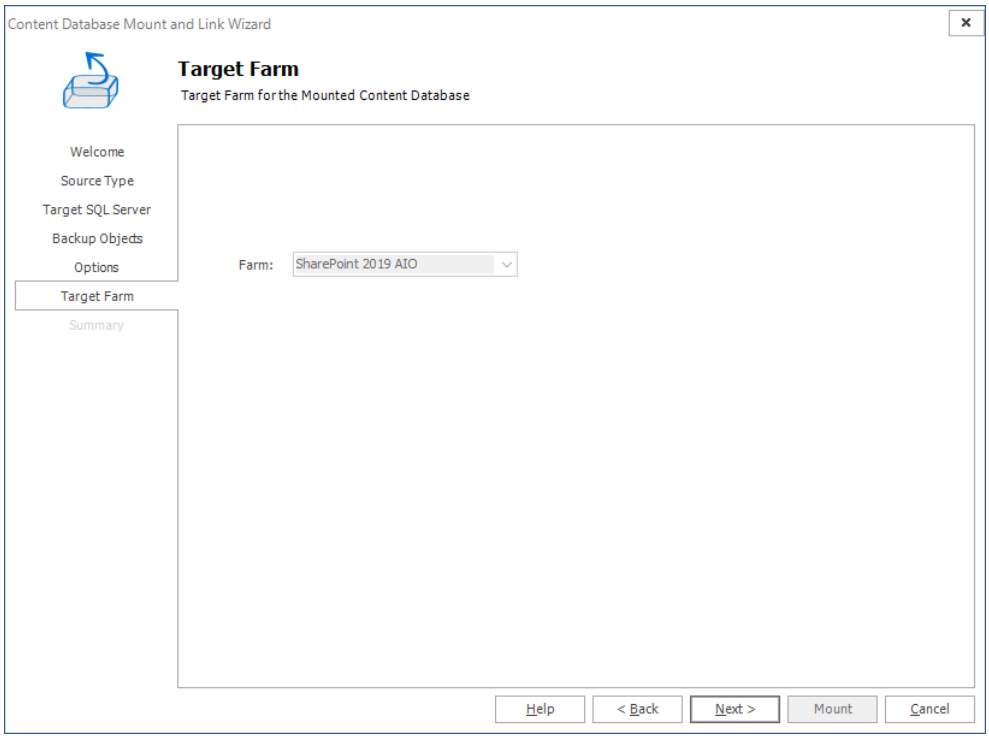
7. Click the **Full farm backup sets available** drop down and select a backup set. Select the content database that you wish to mount.

8. Click **Next**. The **Options** step appears.



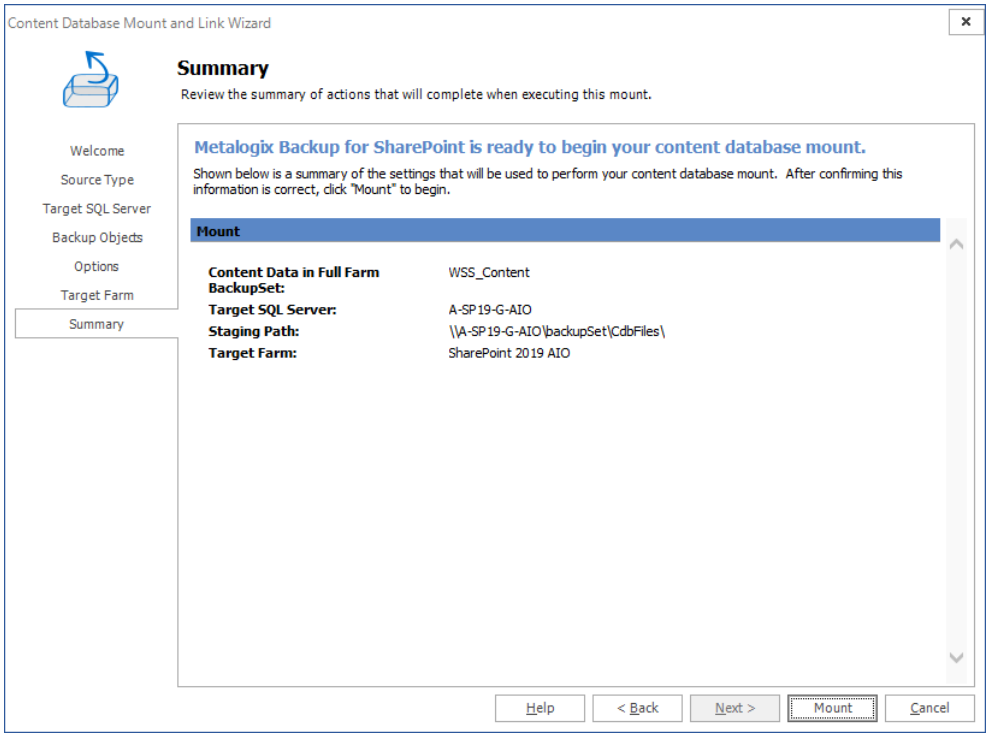
9. Enter a content database mount name and a description. If the backup was created using Microsoft SQL Server Filestream, select the checkbox **Filestream folder path** and specify the location.

10. Click **Next**. The **Target Farm** step appears



11. Select the target farm if there are more than one target SharePoint farms with the same version as the backup set. This drop down appears disabled if there is only one farm with the same version as the backup set.

12. Click **Next**. The **Summary** step appears.



13. Click **Mount** to mount the Metalogix Full Farm Backup.

14. You can now view the mount operation details of the mounted content database from the **Overview** tab and view the contents of the backup set from the **Import and Mount** tab.

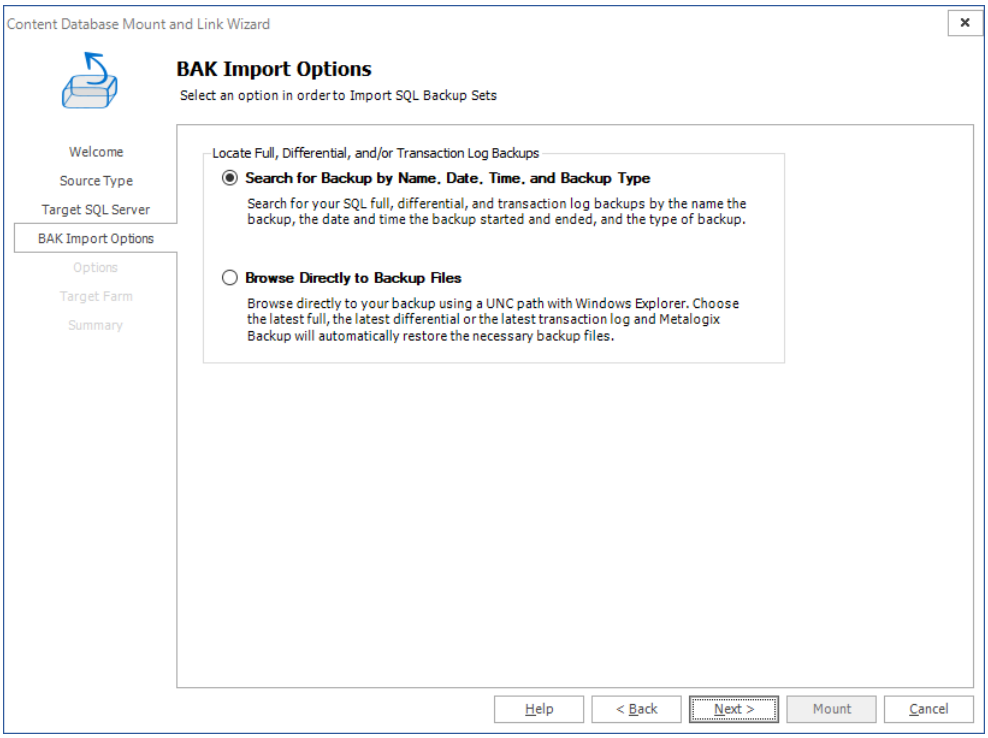
Mounting a SQL Server Backup (BAK) File

The SQL Server Backup (BAK) File option mounts databases from a SQL server .BAK files. This option includes full, differential, and transaction log backups. You can mount several .BAK files of the same content database.

In order to mount a SQL Server Backup File, do the following:

1. From the Management Console workspace selector click **Granular Restore**.
2. Launch the *Content Database Mount and Link Wizard* by doing one of the following:
   - Click the Overview tab and then click Mount and Link Content Database from the ribbon.
   - Click the Import and Mount tab and choose the Mount and Link Content Database from the ribbon.
3. Click **Next** in the Content Database Mount and Link Wizard Welcome step. The **Source Type** step appears.
4. Select **SQL Server Backup (BAK) File - including Full, Differential, and Transaction logs**.
5. Click **Next**. The **Target SQL Server** step appears.
6. Enter the name of a SQL Server, or click **Browse** and select a SQL Server. Either use the Backup Service credentials or enter the server's credentials.

7. Click **Next**. The **BAK Import Options** step appears.

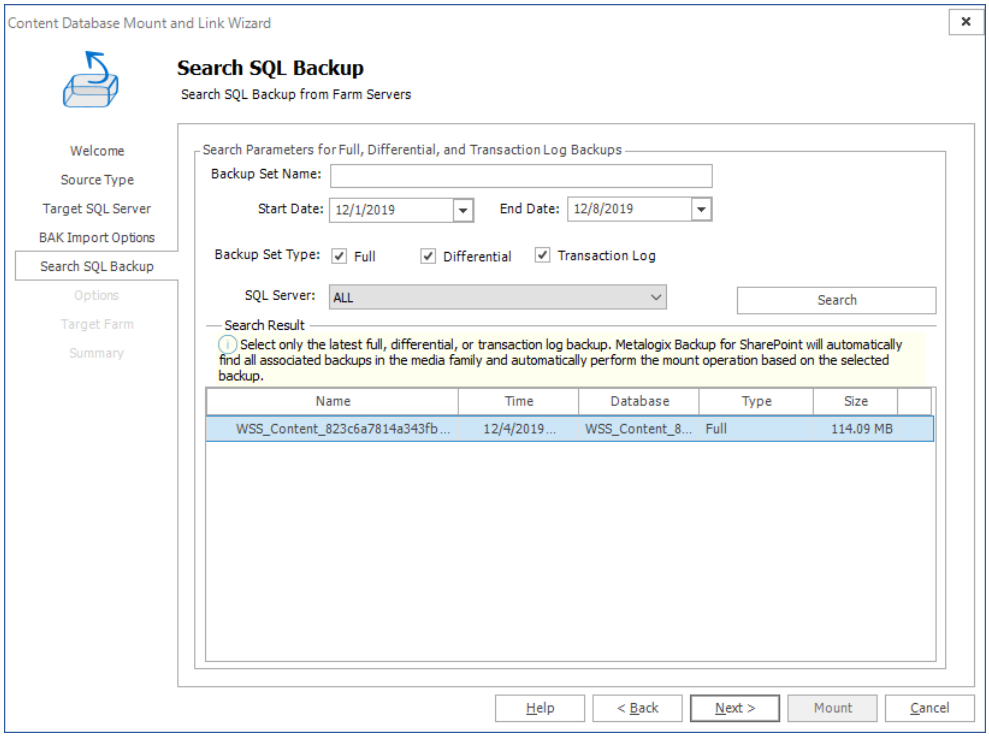


8. Select the method by which you would like to locate full backups, differential backups, and transaction logs.

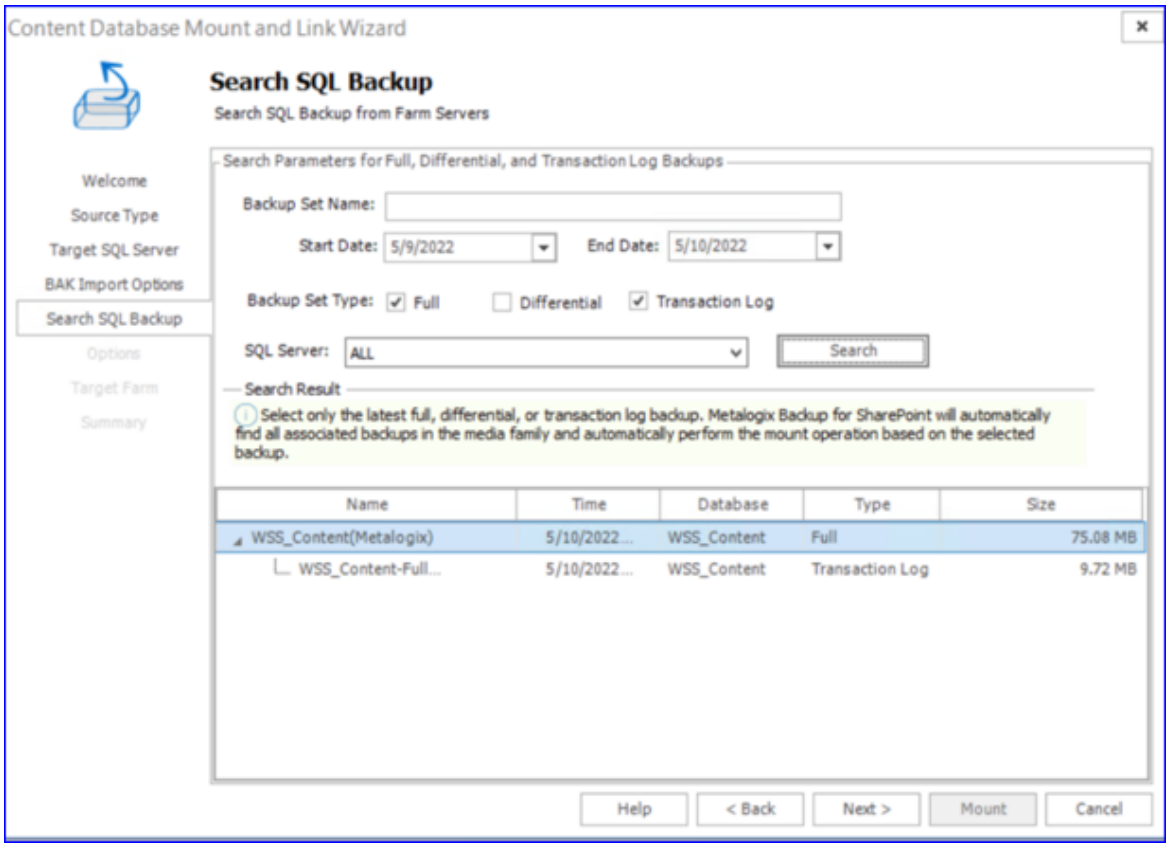
   - If you selected **Search for backup by Name, Date, Time, and Backup type** please continue to the Search for Backup section for further instructions.
   - If you selected **Browse Directly to Backup Files** please continue to the Browse for Backup section for further instructions.

Search for Backup

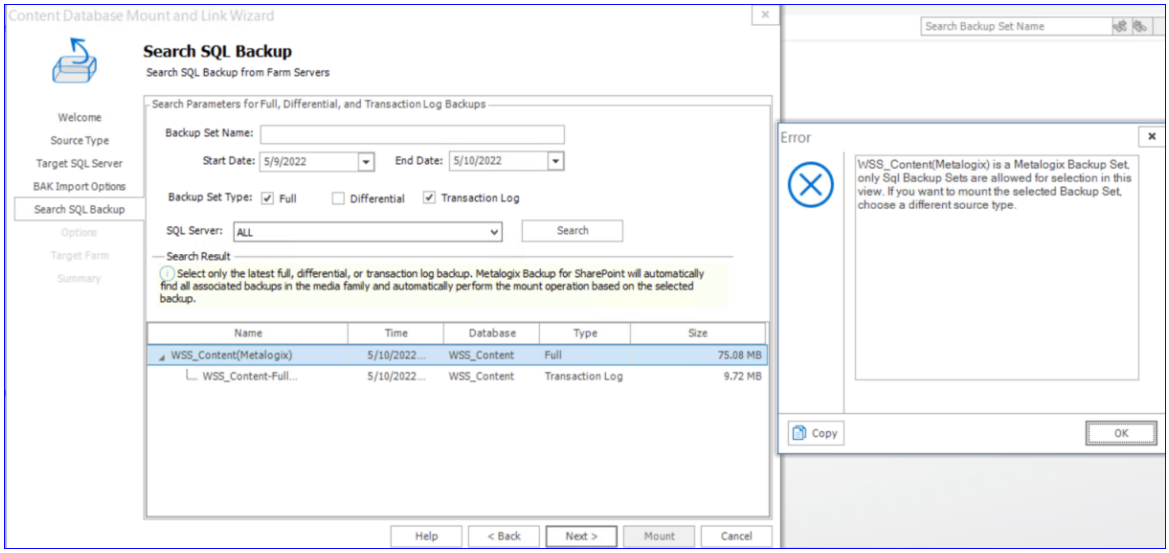
1. In the **Search SQL Backup** step, use the available search parameters to find specific full, differential, and transition log backups. You can search by name, date, backup set type and SQL Server. Select a Backup and click **Next**.



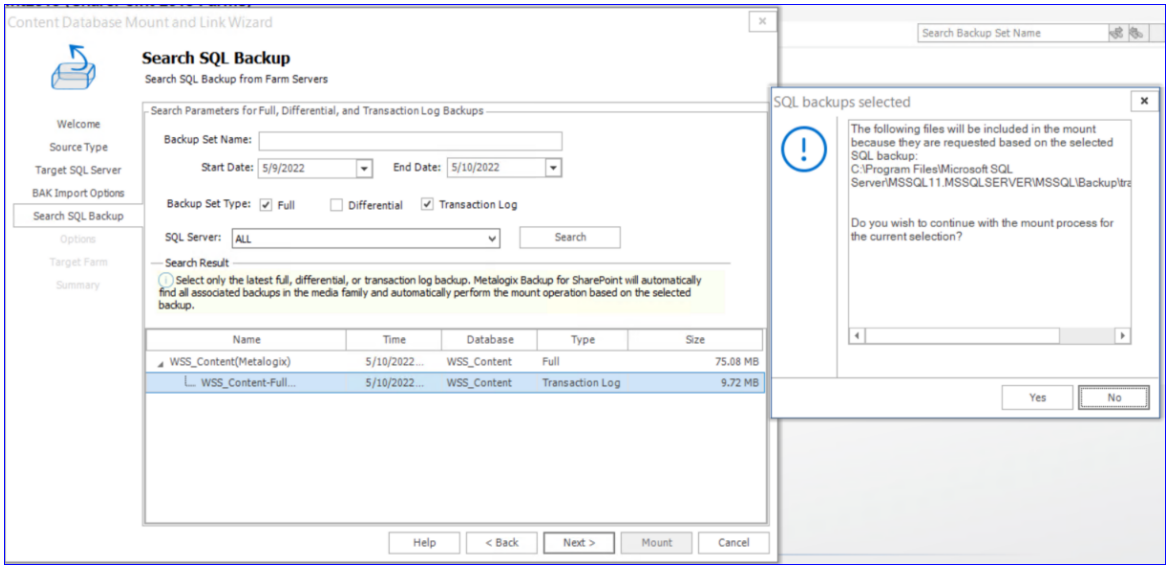
Metalogix Backups are available and can be identified by (Metalogix) in the Backupset Name. This can be used to search.



The Metalogix backup is not to be selected. Otherwise an error message will be displayed.

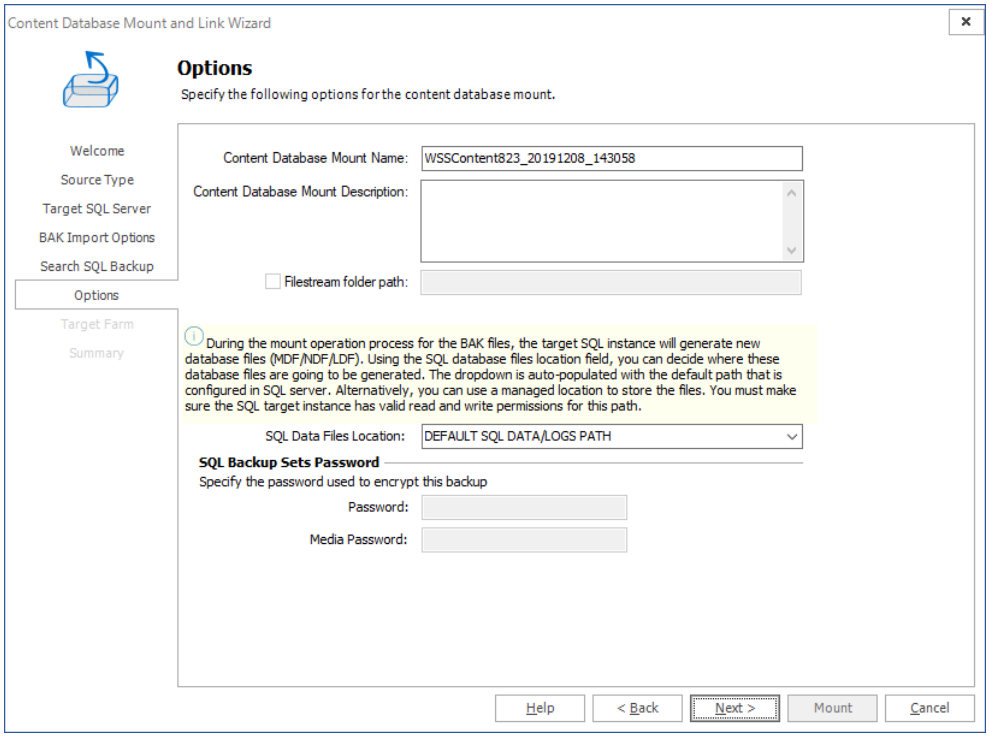


The Transaction Log needs to be selected to use Metalogix Backups with SQL backup options.



2. In the **Options** step, enter a Content Database Mount Name, and a Content Database Mount Description. Select the location for the SQL data files from the drop down list, and enter the Password and/or Media Password for any backups that were created with passwords. Click **Next** to

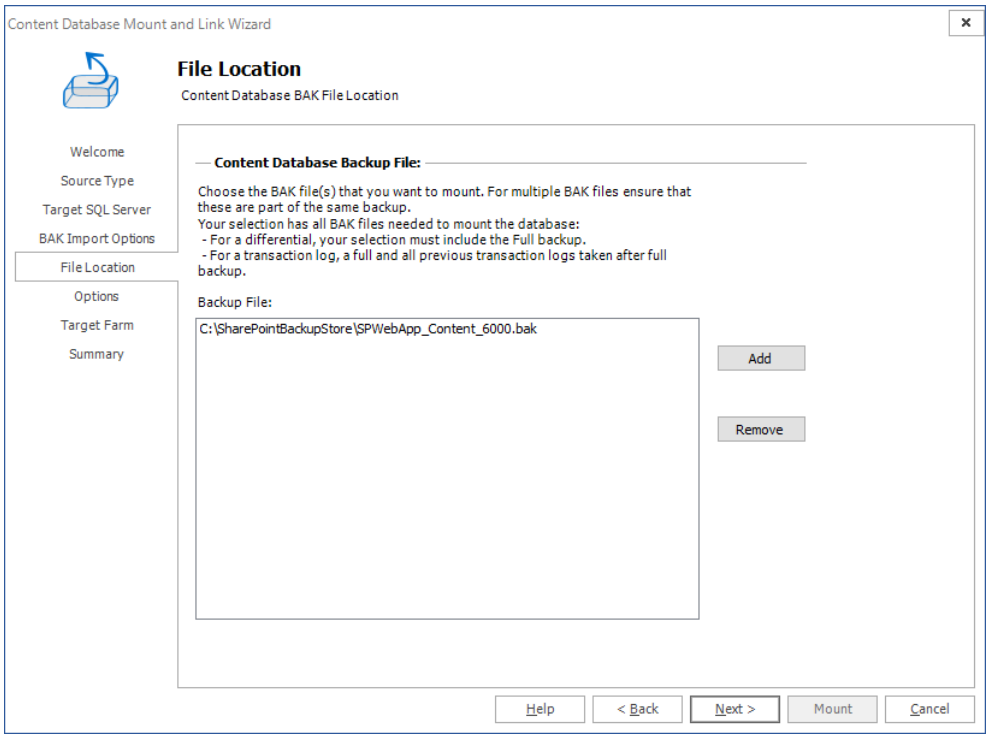
continue.



3. In the **Target Farm** step, select the target farm. Click **Next**.
4. In the **Summary** step, click **Mount** to mount the BAK File.
5. You can now view the mount operation details of the mounted content database from the **Overview** tab and view the contents of the backup set from the **Import and Mount** tab.

Browse for Backup

1. In the **File Location** step, click **Add** to add a backup file. You may add multiple backup files but they must be on the same content database. Click **Next**.



2. In the **Options** step, enter a Content Database Mount Name, and a Content Database Mount Description. Select the location for the SQL data files from the drop down list, and enter the Password and/or Media Password for any backups that were created with passwords. Click **Next** to continue.
3. In the **Target Farm** step, select the target farm. Click **Next**.
4. In the **Summary** step, click **Mount** to mount the BAK File.
5. You can now view the mount operation details of the mounted content database from the **Overview** tab and view the contents of the backup set from the **Import and Mount** tab.

Mounting a SQL Server Data and Log (MDF/LDF) File

The SQL Server Data and Log (MDF/LDF) File option allows you to mount content databases from data (MDF) and log (LDF) files.

In order to Mount a SQL Server Data and Log File, do the following:

1. From the Management Console workspace selector click **Granular Restore**.
2. Launch the *Content Database Mount and Link Wizard* by doing one of the following:
   - Click the Overview tab and then click Mount and Link Content Database from the ribbon.
   - Click the Import and Mount tab and choose the Mount and Link Content Database from the ribbon.
3. Click **Next** in the Content Database Mount and Link Wizard **Welcome** step. The **Source Type** step appears. Select **SQL Server Data and Log File (MDF/LDF) File** as the content database source type.
4. Click **Next**. The **Target SQL Server** step appears.
   a. Enter the name of a SQL Server, or click **Browse** and select a SQL Server.
   b. For authentication, either use the Backup Service credentials or enter the server's credentials.
5. Click **Next**. The **File Location** step appears. Click **Add** to add Data and Log files.
6. Click **Next**. The **Options** step appears. Enter a name for the content database and a description. If the backup was created using Microsoft SQL Server Filestream, select the checkbox **Filestream folder path** and specify the location.
7. Click **Next**. The **Target Farm** step appears. Select the target farm.
8. Click **Next**. The **Summary** Page, click **Mount** to mount the MDF/LDF File.
9. You can now view the mount operation details of the mounted content database from the **Overview** tab and view the contents of the backup set from the **Import and Mount** tab.

Mounting SharePoint Full Farm Backup

The SharePoint Full Farm Backup option allows you to mount backups taken by SharePoint from Central Administration or PowerShell (Backup-SPFarm). These backups usually contain multiple .BAK files so you must select the folder that contains all the backup files.

To mount a SharePoint Full Farm Backup, do the following:

1. From the Management Console workspace selector click **Granular Restore**.
2. Launch the Content Database Mount and Link Wizard by doing one of the following:
   - Click the **Overview** tab and then click **Mount and Link Content Database** from the ribbon.
   - Click the **Import and Mount** tab and click **Mount and Link Content Database** from the ribbon.
3. Click **Next** in the Content Database Mount and Link Wizard **Welcome** step. The **Source Type** step appears. Select **SharePoint Full Farm Backup** as the content database source type.
4. Click **Next**. The **Target SQL Server** step appears.
   a. Enter the name of a SQL Server, or click **Browse** and select a SQL Server.
   b. For authentication, either use the Backup Service credentials or enter the server's credentials.
5. Click **Next**. In the **File Location** step, enter the **Backup Directory Location** that contains the SharePoint Full Farm Backup. Select a Metalogix Backup for SharePoint set from the drop down list. Select the Content Database that you wish to mount.
6. Click **Next**. In the **Options** step, give the content database mount a name and a description. If the backup was created using Microsoft SQL Server Filestream, select the check box **Filestream folder path** and specify the location.
7. Click **Next**. In the **Staging Path** step, select the network location that will be your staging path. The staging path used must be located on a machine where the Backup Service user is a local administrator, otherwise you cannot mount the database.
8. Click **Next**. In the **Target Farm** step, select the target farm.
9. Click **Next**. In the **Summary** step, click **Mount** in order to mount the SharePoint Full Farm Backup.
10. You can now view the mount operation details of the mounted content database from the **Overview** tab and view the contents of the backup set from the **Import and Mount** tab.

Linking to a SQL Server Content Database

The SQL Server Content Database option allows you to link directly to an existing SQL database that is already mounted.

In order to Mount a SQL Content Database, do the following:

1. From the Management Console workspace selector click **Granular Restore**.

2. Launch the Content Database Mount and Link Wizard by doing one of the following:
   - Click the **Overview** tab and then click **Mount and Link Content Database** from the ribbon.
   - Click the **Import and Mount** tab and click **Mount and Link Content Database** from the ribbon.
3. Click **Next** in the Content Database Mount and Link Wizard **Welcome** step. The **Source Type** step appears. Select **Link to Content Database** as the content database source type.
4. Click **Next**. The **Content Database** step appears.
   a. Enter the name of a SQL Server, or click **Browse** and select a SQL Server.
   b. Either use the Backup Service credentials or enter the server's credentials.
   c. Click **Populate** to populate the drop down list of available content databases. Select a content database from the drop down list.
5. Click **Next**. The **Options** step appears. Enter a content database link name and a description. If the backup was created using Microsoft SQL Server Filestream, select the check box **Filestream folder path** and specify the location.
6. Click **Next**. The Target Farm step appears. Select the target farm.
7. Click **Next**. The Summary step appears. Click **Mount** to mount and link the content database.
8. You can now view the mount operation details of the linked content database from the **Overview** tab and view the contents of the linked database from the **Import and Mount** tab.

Restoring SharePoint objects

Metalogix Backup for SharePoint lets you restore complete site collections and Web sites. You can also restore individual objects and their child objects. You can choose whether to restore the backed-up objects in place of the existing objects or in a new SharePoint location. You can also restore to a local copy on your computer.

The following checklist helps guide you when you restore SharePoint objects:

☑	Follow these steps ...
☐	Choose one of the following restore types: • In-place • Out-of-place • Local For more information about the restore types, see Understanding the granular restore process.
☐	Identify the objects to restore. Objects can include the following: • Site collections. • Web sites • Libraries • Lists
☐	For each collection of objects you need to restore, determine which backup set contains those objects.
☐	Specify the restore operation. For more information about restoring a backup, see Restoring a backed-up SharePoint object.

NOTE: Restoring granular objects can only be done on the same version of SharePoint from which the backup was taken.

Understanding the granular restore process

Metalogix Backup for SharePoint uses a Backup Service that you install on your SharePoint Web Front End (WFE) servers or SQL Server to perform all backup and restore operations. The Backup Service communicates with both the Management Service and with SharePoint. When Metalogix Backup for SharePoint restores backed-up SharePoint objects, it follows the SharePoint object model:

- Documents or Files
- Folders

- Libraries
- Lists
- List items
- Sites or Web sites
- Site Collections

What restore type options are available?

The Restore Type option allows you to specify how Metalogix Backup for SharePoint restores the backed-up objects. Each restore type has its own wizard that guides you through the restore process.

In-place

When you perform an in-place restore Metalogix Backup for SharePoint will add the missing objects to the destination. With the **Overwrite Data** option available in the restore wizards, when selected, allows you to overwrite content on your farms with the content selected in the restore section.

Out-of-place

An out-of-place restore creates new SharePoint objects in your farm. Metalogix Backup for SharePoint restores the backed-up objects to a different SharePoint location. The new location must be a valid SharePoint structure for the objects. For example, you cannot restore a list within another list.

If an object that you restore has the same name and type as an object that already exists, Metalogix Backup for SharePoint prompts you to overwrite the existing object or skip it.

If an object that you restore has the same name as an object that already exists, but is a different object type, Metalogix Backup for SharePoint does not restore the object.

Metalogix Backup for SharePoint never automatically overwrites objects during an out-of-place restore. No objects with the same name can exist at the same place in the hierarchy. For example, If you back up List1 under Web site A, and Web site B already has a List1, you cannot restore the backed-up List1 under Web site B.

The restored objects have all of the applicable permissions that were defined when the objects were backed-up. The out-of-place restore option lets you copy and move SharePoint objects and their child objects.

Local

Creates a hierarchy of folders in a location accessible to the computer that hosts the Management Console, then copies the backed-up SharePoint files and folders to that location.

Each restored file or folder inherits the permissions of the local folder. The local restore option lets you retrieve a local copy of the file. You can use this option to quickly retrieve a copy of a backed-up file and verify that you selected the correct version of the file. Metalogix Backup for SharePoint lets users perform local restores to their computer.

What should I consider when I restore SharePoint objects?

When you restore an object, the parent of the target object must already exist. For example, if you perform an in-place restore of Web site B and Web site B is under Web site A in the backup set, Web site A must exist in the restore target location to restore Web site B. If you perform an out-of-place restore of Web site B , the Web site that you select to restore Web site B must exist.

When you restore a SharePoint object, Metalogix Backup for SharePoint does not modify the parent of the target object. Because of this, Metalogix Backup for SharePoint cannot restore some components of SharePoint objects that require changes to the target parent. This means that among others, Metalogix Backup for SharePoint is unable to restore workflows, links, and custom column names.

If you restore a custom list, Metalogix Backup for SharePoint may not restore the changes to the default column names. If the custom column names do not exist in the target parent SharePoint object, Metalogix Backup for SharePoint cannot restore these changes.

When you restore a document or list item, Metalogix Backup for SharePoint does not restore any workflows that are associated with that document. If you restore a site that contains lists or libraries with workflows that are set to start automatically, the workflow is restored but is set to start manually. When you restore a document or list item that includes an associated Web Part, Metalogix Backup for SharePoint does not restore the Web Part

When you restore only a list, and you have configured custom content types or inherited content types, Metalogix Backup for SharePoint may not restore the content types and workflow associations for the list. Metalogix Backup for SharePoint restores what it can based on whether the content types exist in the target parent.

If you restore in-place list items that were deleted, Metalogix Backup for SharePoint creates new list items. If you perform another in-place restore operation that includes those list items, Metalogix Backup for SharePoint may create duplicate objects because the internal identifiers for the list items do not match the originally backed-up objects.

When you restore an object using a differential backup, Metalogix Backup for SharePoint displays two restore operations on the Management Console Overview tab: a restore from the full backup immediately followed by a restore from the differential backup.

What permissions are required to restore SharePoint objects?

Metalogix Backup for SharePoint uses the permissions of the logged in user on the computer where the Management Console is installed. When you restore a site collection, Web site, or SharePoint item, Metalogix Backup for SharePoint takes into account both the current permissions that the user has and the permissions the user had when the backup was created.

The user must have appropriate permissions assigned both when the backup was created, and in the present. In the present, the permission applies to the site collection that is the target for the restore. The user must have one of the following permissions assigned, otherwise if the user did not have

sufficient permissions when the objects were backed-up, Metalogix Backup for SharePoint displays the site collections and Web sites in the backup set as disabled.

Site Collection Administrator

Users with the Site Collection Administrator role can restore SharePoint items to any site or site collection where they are the administrator.

Web Application Policy - Full Control

A user who has full control as a result of a Web application policy can restore SharePoint items to any site or site collection in a Web application where they are granted full control.

SharePoint Farm Administrator

A SharePoint Farm Administrator can restore SharePoint items to any site or site collection in a SharePoint farm, including MySites for all users.

Restoring a backed-up SharePoint object

The Management Console allows you to restore:

- List items and documents
- Folders
- Lists and Libraries
- Sites or Web Sites
- Site Collections

When you perform a restore, you can choose where to restore the backed-up objects. You can restore:

- By replacing existing objects
- In a new SharePoint location
- To a local copy on a computer

What should I consider when I restore SharePoint objects?

Consider the following questions before attempting to restore any SharePoint objects:

- Which objects do you want to restore?
- Where do you want to restore the objects?
- What are the expected results?

Restoring backed-up SharePoint objects can only be done on the same version of SharePoint from which the Backup was taken. For more information about these considerations, the permissions

required to restore SharePoint objects, and the overall restore process, see Understanding the granular restore process.

Why are some SharePoint objects disabled in the Management Console?

The Management Console disables or hides some objects when you do not have the appropriate permissions for those objects. In addition, some objects are disabled or hidden if the backup is archived or moved to another location. If the backup set is archived or moved, you may be able to view the backup set in a list, but you cannot view the objects in the backup set.

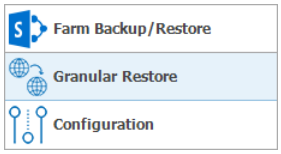
If you return the archived backup set to its original backup set storage location, you can view the objects in the backup set. For more information about the permissions required to back up SharePoint objects, see Understanding the granular restore process. For more information about archived backup sets, see Managing Backup Set disk space.

How do I restore a backed-up object?

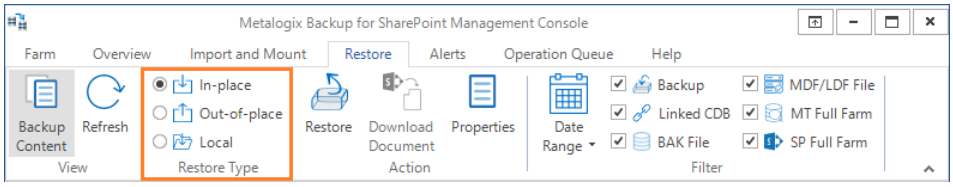
Use the Management Console to restore a backed-up object.

To restore a backed-up object

1. From the Management Console workspace selector click **Granular Restore**.

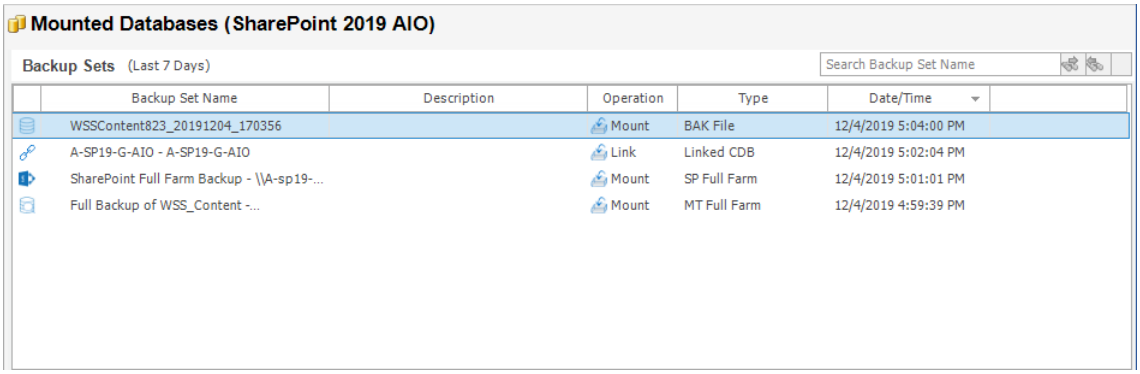


2. In the **Granular Restore** pane, select a farm and then select **Mounted Databases**.
3. Click the **Restore** tab.
4. In the ribbon, select the type of restore to perform from one of the following choices:

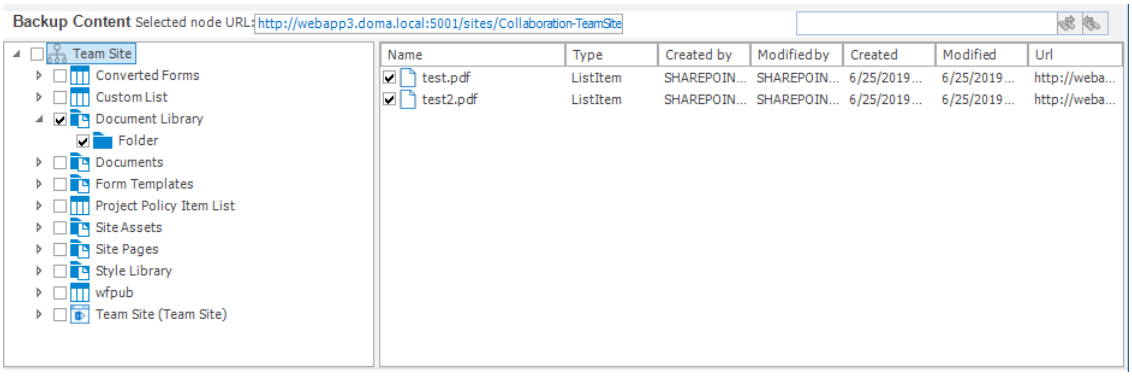


- **In-place**. The restored content is returned to the same place in the SharePoint farm in which it originated. All selected items must belong to the same parent site. Multiple targets are not permitted.
- **Out-of-place**. The restored content is stored in a new location that you specify in your SharePoint farm.
- **Local**. The restored content is stored in a location accessible from the computer that hosts the Management Console.

5. In the **Backup Sets** pane, click the backup set from where you want to restore content.

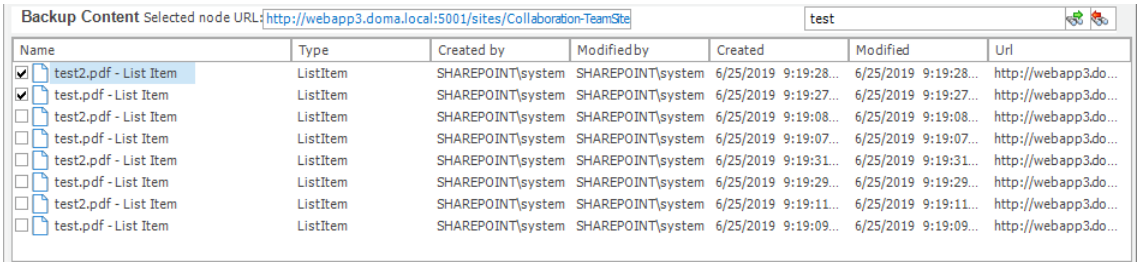


6. In the **Backup Content** area, select the check boxes for the content to restore.



You can also use the search box to search for item names that start with the expression entered in the search box. If the search items are documents, you can select a document and click **Download Document** from the ribbon to open the document in its document viewer.

> **NOTE:** To preview a document, a program that can open the document must be installed on the computer that hosts the Management Console.



Select the items that you want to restore. You can also use **Live Compare** to locate and visually verify the objects that you want to restore. For more information see How does Live Compare help me locate missing objects?

7. In the ribbon, click **Restore** to open the wizard for the selected restore type.

How does Metalogix Backup for SharePoint match file names when searching?

When you specify an object name, Metalogix Backup for SharePoint searches for that name starting at the beginning of the names of the backed-up objects. The value you specify must be at the beginning of the object name, or there must be a space or separator, such as an underscore or period, in the name before the value you specified.

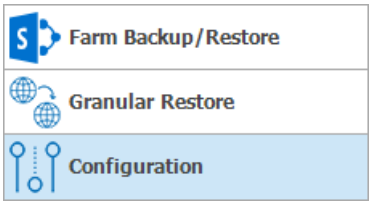
You can also specify a wild card character (? or *) in the middle of the search value. The question mark (?) matches a single character. The asterisk (*) matches one or more characters.

If You Specify	Matches	Does Not Match
temp	template.doc Default Template Default_Template	DefaultTemplate DefaultTemp
Def*Template	Default Template Default Template01 Default_Template	Default Temp01 Default_Template
Defaul?Temp	DefaultTemplate DefaultTemplate01 Defaul Template	Default Temp01 DefaultTemplate
Def*Template??	DefaultTemplate01 Default Template01 Def Templates2	DefaultTemplate DefaultTemplate1 01DefaultTemplate01
Default Template	The DefaultTemplate Default Template	DefaultTemplate01 01DefaultTemplate

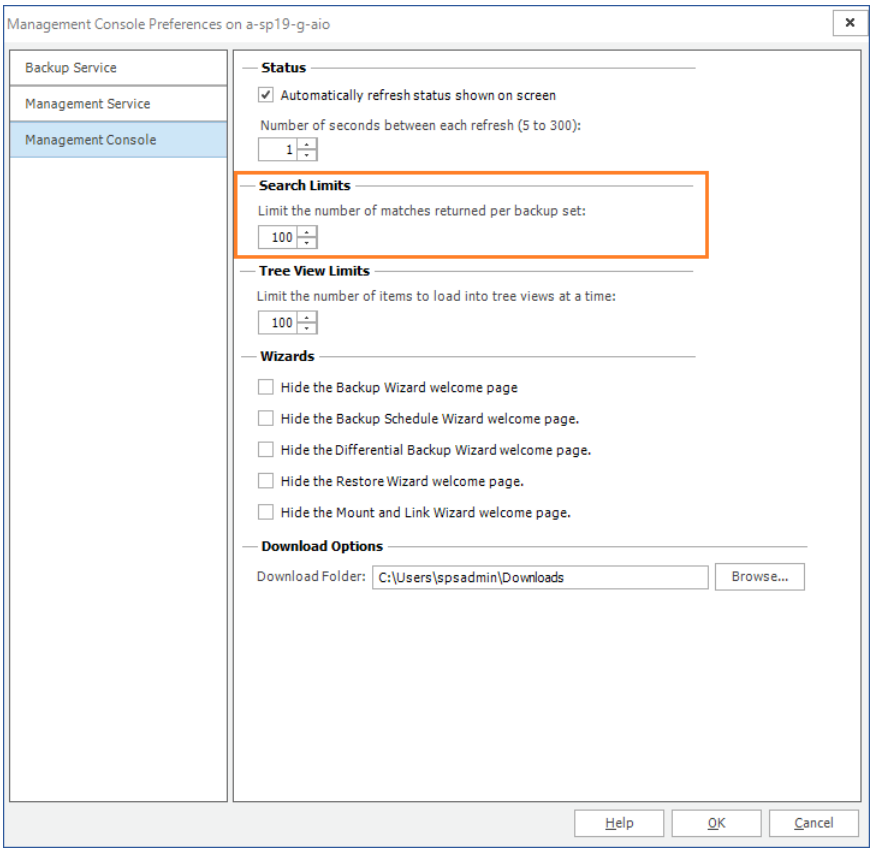
How do I control the number of search results ?

By default, search results include only the first 100 results per backup set. Use the Management Console to change this setting and display between 20 and 999 results per backup set.

1. From the Management Console workspace selector click **Configuration**.



2. In the **Configuration** pane, select the farm whose Management Service search preference you want to set.
3. In the **Configuration** tab ribbon, click **Management Console**. The Management Console Preferences window opens.

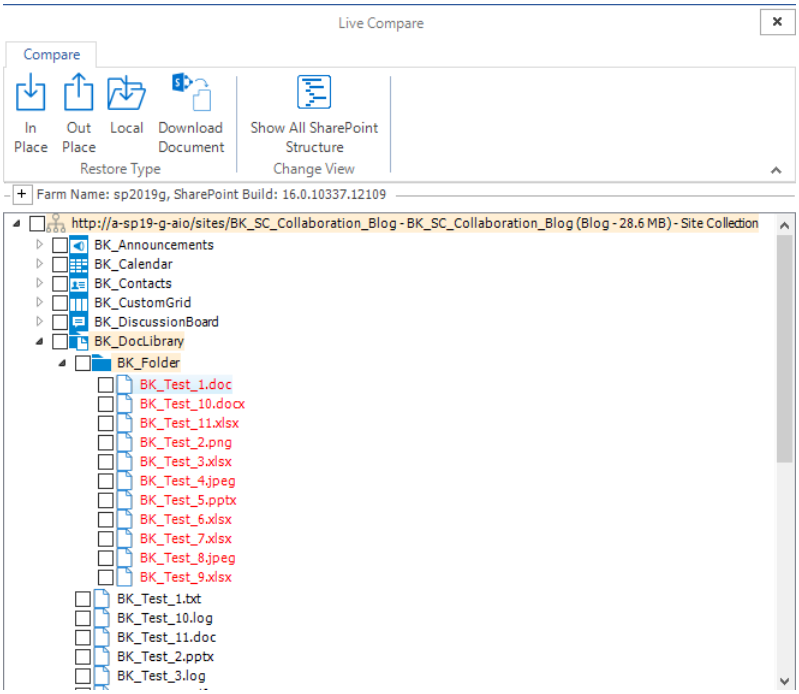


4. Set the search limit value in the **Limit the number of matches returned per backup set** between 20 to 9999.
5. Click **OK** to close the window and save the changes you made to the Management Console preferences.

How does Live Compare help me locate missing objects?

You can compare the objects in a backup set with the objects in the live SharePoint farm which you want to restore. The comparison is color-coded to indicate the difference between the farm and the backup set.

1. In the **Backup Content** area, select the check boxes for the content to restore.
2. Select any node that you want to inspect.
3. Right-click the node or anywhere in the hierarchy pane and from the context-menu select **Live Compare**.
4. Expand the highlighted node in the **Live Compare** window. A highlighted node indicates that one or more differences were detected in that node. Optionally, you can expand your search for more differences by clicking **Show All SharePoint Structure** to list the entire farm hierarchy.



5. When you expand a highlighted node all the way, you will find the differences. Use the following color code:
   a. **Black** - The object exists in the farm and the backup set.
   b. **Gray** - The object exists in the farm but not in the backup set.
   c. **Red** - The object exists in the backup set but not in the farm.
6. Select one or more items, folders, lists, sites or site collections you want to restore. If the items are documents, you can select a document and click **Download Document** from the ribbon to open the document in its document viewer.

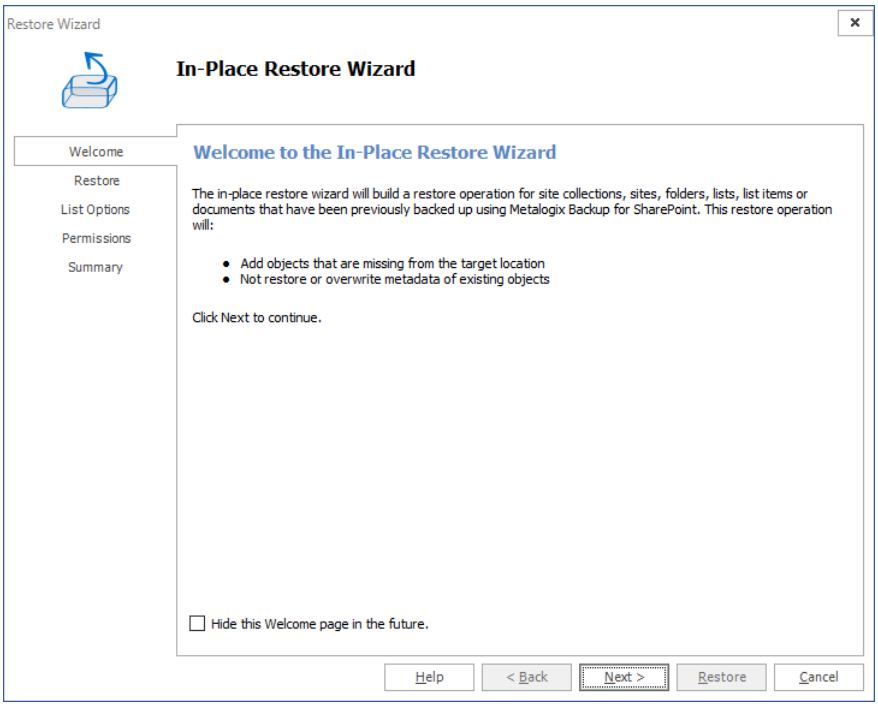
> **NOTE:** To preview a document, a program that can open the document must be installed on the computer that hosts the Management Console.

7. From the ribbon, select a Restore Type: **In-place**, **Out-of-place** or **Local**.
8. Click **Restore**. The restore wizard for the selected restore type starts.

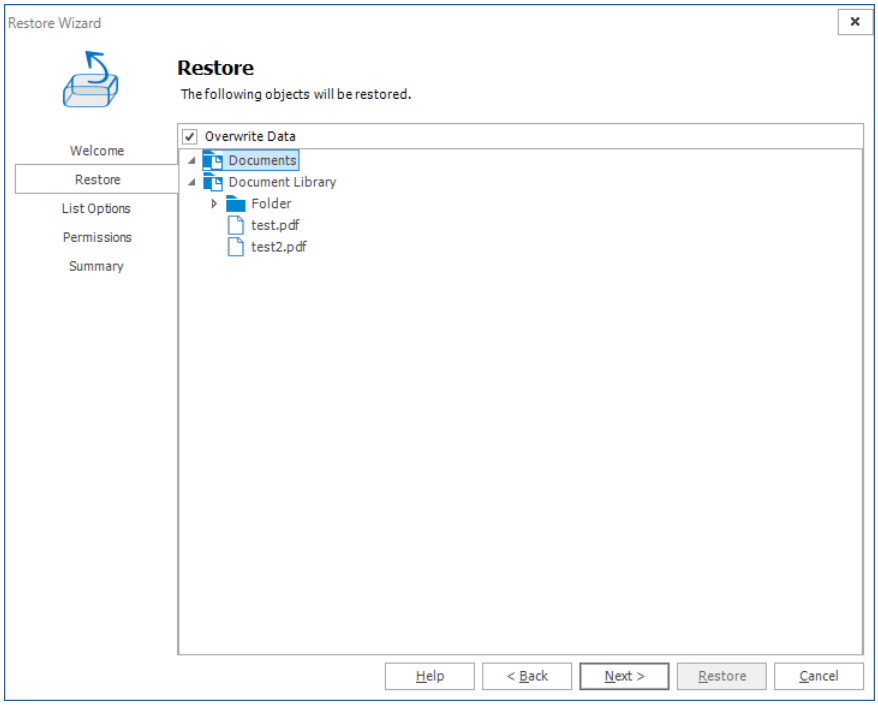
Restoring Lists and List items

Follow the steps below to restore list items and documents:

1. From the Management Console workspace selector click **Granular Restore**.
2. In the **Granular Restore** pane, select a farm and then select **Mounted Databases**.
3. Click the **Restore** tab.
4. In the ribbon, select a Restore Type: **In-place**, **Out-of-place** or **Local.**
5. In the **Backup Sets** pane, click the backup set from where you want to restore content.
6. In the **Backup Content** area, select the check boxes for the *list items* or *documents* to restore. You can also use the search box to search for the *list item* or *document* names that start with the expression entered in the search box.
7. In the ribbon, click **Restore.** Depending on your choice of Restore Type, the **In-Place Restore Wizard**, **Out-of-Place Restore Wizard** or **Local Restore Wizard** opens.
8. In the **Welcome** step you can select the **Hide this Welcome page in future** to skip this step the next time you invoke the wizard.

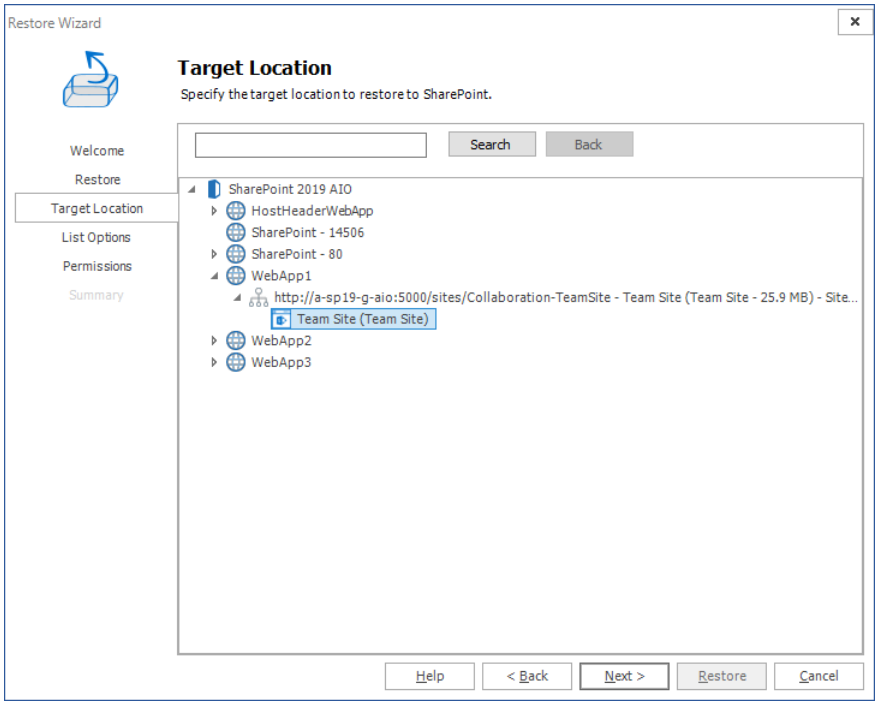


9. Click **Next**. The the **Restore** step appears. Review the objects to restore. If you want to overwrite all the objects that will be restored, then select **Overwrite Data**.

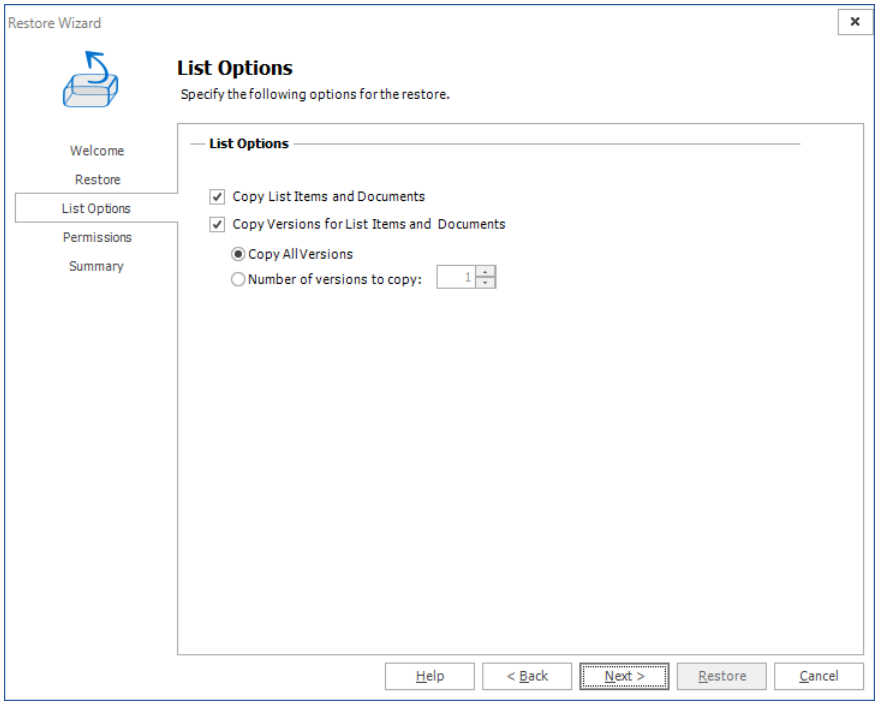


10. Click **Next**. The **Target** step appears. Specify the target location for where you want your restore to occur . You can specify a target in the search field when you have a large number of targets.

> **NOTE:** This option is only available when you perform an out-of-place restore, or a restore to a local folder.
>
> For **in-place** and **out-of-place** restore types, Metalogix Backup for SharePoint displays a tree selection model based on the objects you selected to restore so you can select only valid places to restore those objects. You must have the appropriate permissions in the target SharePoint site.
>
> For the local restore type, specify the folder where you want Metalogix Backup for SharePoint to restore the local copy of the files.
>
> For more information and additional important considerations, see Understanding the granular restore process.



11. Click **Next**. The **Item Options** step appears.

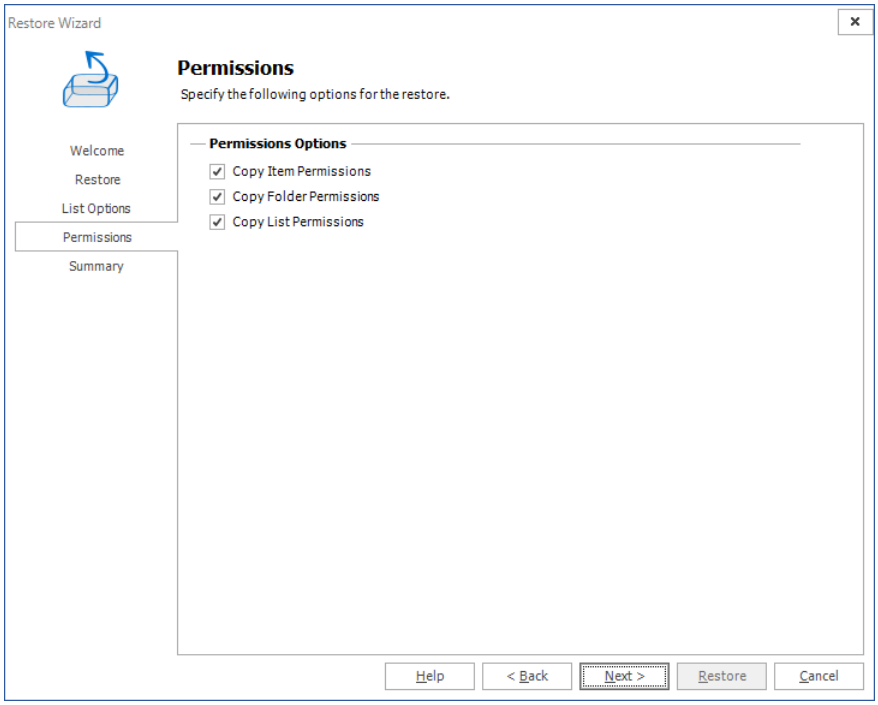


Select from the following settings:

a. **Copy List Items and Documents:** This option allows granular copy of list items and documents.

b. **Copy versions for List Items and Documents**: This option allows including major and/or minor versions of the content. Versioning must be enabled on the target destination. By default **Copy all versions** is selected. If the end user wants to copy just some versions, they must check select **Number of versions to copy** and enter the amount of versions to be used during the restore.

12. Click **Next**. The **Permissions** step appears.



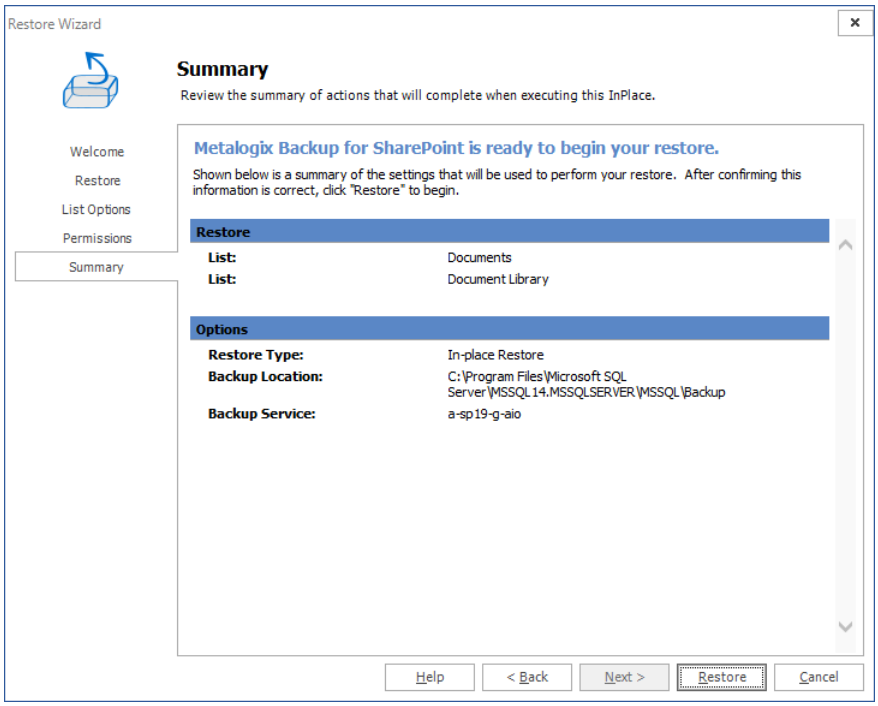
Select from the following options:

a. **Copy Item Permissions**: Unique permissions to the specific items to be restored.

b. **Copy Folder Permissions**: Unique permissions to the specific folder nodes to be restored.

c. **Copy List Permissions**: Unique permissions to the specific list or library to be restored.

13. Click **Next**. The **Summary** step appears.

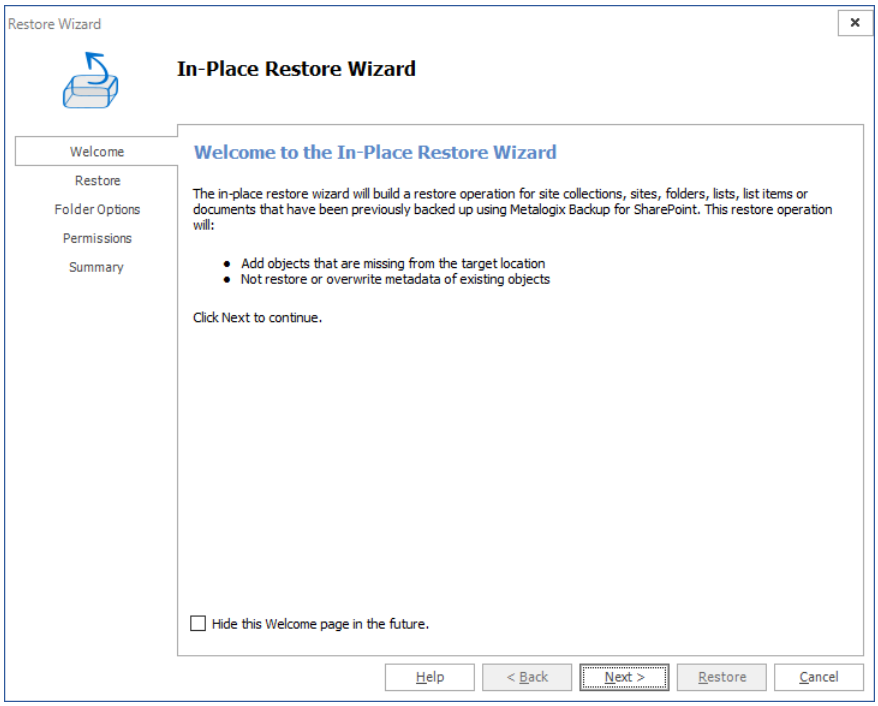


14. Review the restore settings and click **Restore**.

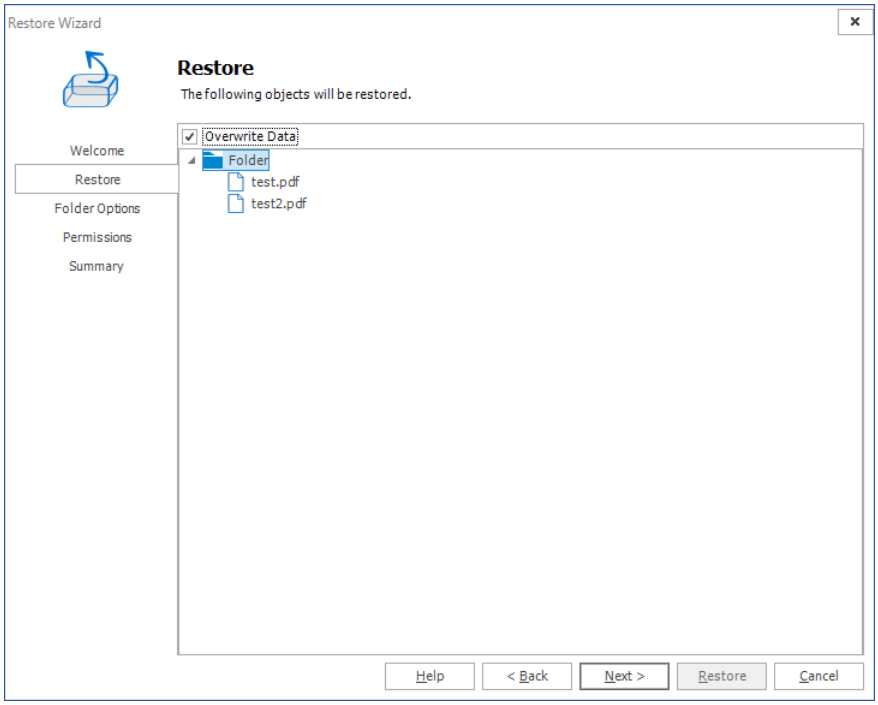
Restoring Folders

Follow the following steps to restore folders:

1. From the Management Console workspace selector click **Granular Restore**.
2. In the **Granular Restore** pane, select a farm and then select **Mounted Databases**.
3. Click the **Restore** tab.
4. In the ribbon, select a Restore Type: **In-place**, **Out-of-place** or **Local.**
5. In the **Backup Sets** pane, click the backup set from where you want to restore content.
6. In the **Backup Content** area, select the check boxes for the *folders* to restore. You can also use the search box to search for the *folder* names that start with the expression entered in the search box.
7. In the ribbon, click **Restore.** Depending on your choice of Restore Type, the **In-Place Restore Wizard**, **Out-of-Place Restore Wizard** or **Local Restore Wizard** opens.
8. In the **Welcome** step you can select the **Hide this Welcome page in future** to skip this step the next time you invoke the wizard.

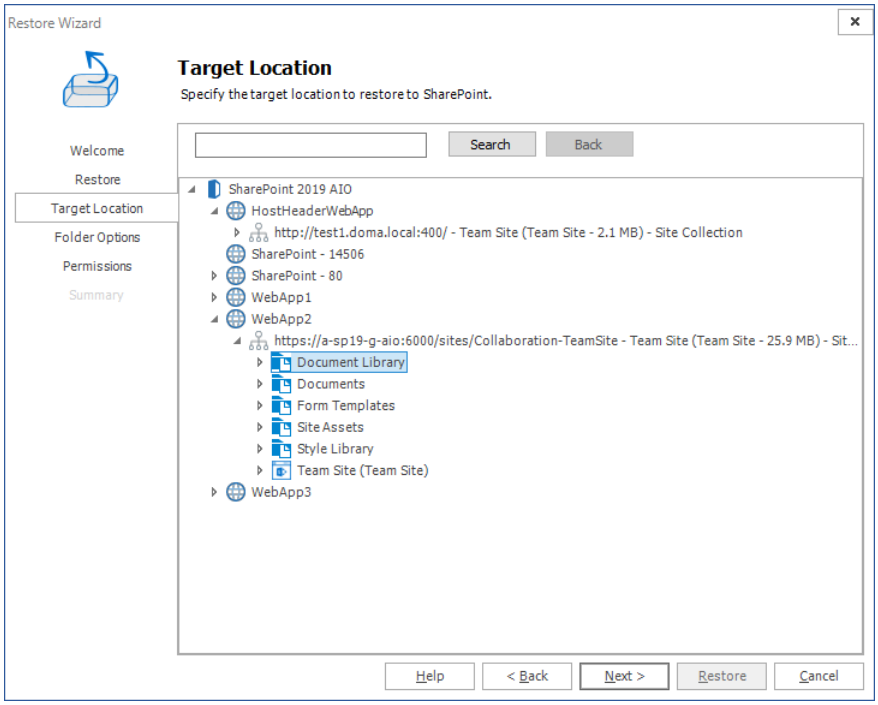


9. Click **Next**. The **Restore** step appears. Review the objects to restore. If you want to overwrite all the objects that will be restored, then select **Overwrite Data**.

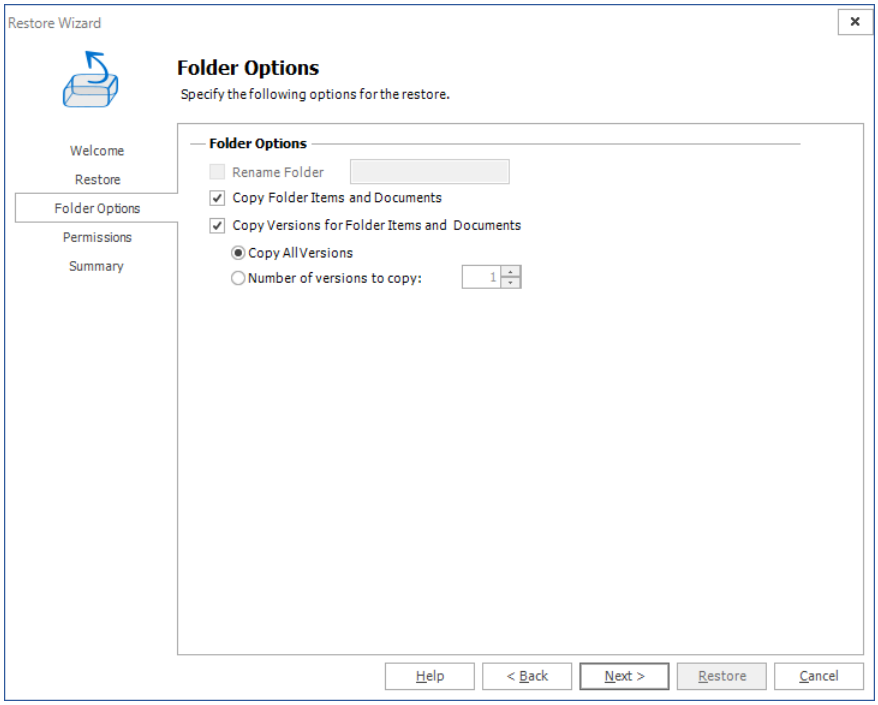


10. Click **Next**. The **Target** step, specify the target location for where you want your restore to occur (this option is only available when the restore is done out-of-place or to a local folder). You can specify a target in the search field when you have a large number of targets.

> **NOTE:** This option is only available when you perform an out-of-place restore, or a restore to a local folder.
>
> For **in-place** and **out-of-place** restore types, Metalogix Backup for SharePoint displays a tree selection model based on the objects you selected to restore so you can select only valid places to restore those objects. You must have the appropriate permissions in the target SharePoint site.
>
> For the local restore type, specify the folder where you want Metalogix Backup for SharePoint to restore the local copy of the files.
>
> For more information and additional important considerations, see Understanding the granular restore process.



11. Click **Next**. The **Folder Options** step appears.



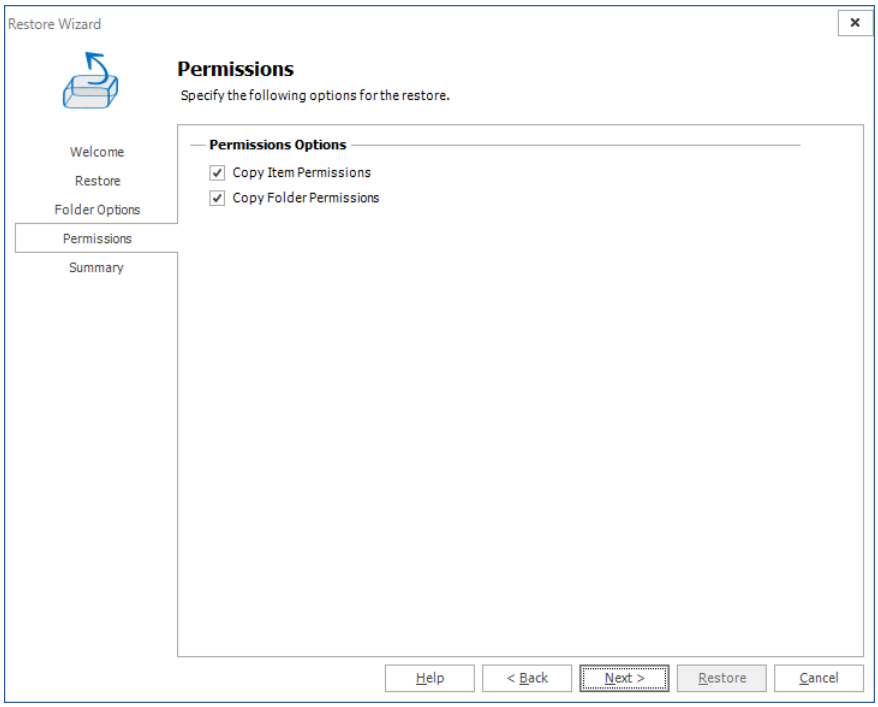
Select from the following options:

a. **Rename Folder**: (enabled only in the out-of-place restore wizard or if restoring to a local folder) Gives a new name to the folder on the target destination. The check box must be checked and a correct folder name must be typed in the text box.

b. **Copy Folder Items and Documents**: This option allows folder items and documents to be copied. This option is checked by default.

c. **Copy Versions for Folder Items and Documents**: This option allows the inclusion of major and/or minor versions of the content. Versioning must be enabled on the target destination. By default **Copy all versions** is selected. If the end user wants to copy only some versions, they must check the radio button **Number of versions to copy** and enter the number of versions to be used during restore.

12. Click **Next**. The **Permissions** step appears.

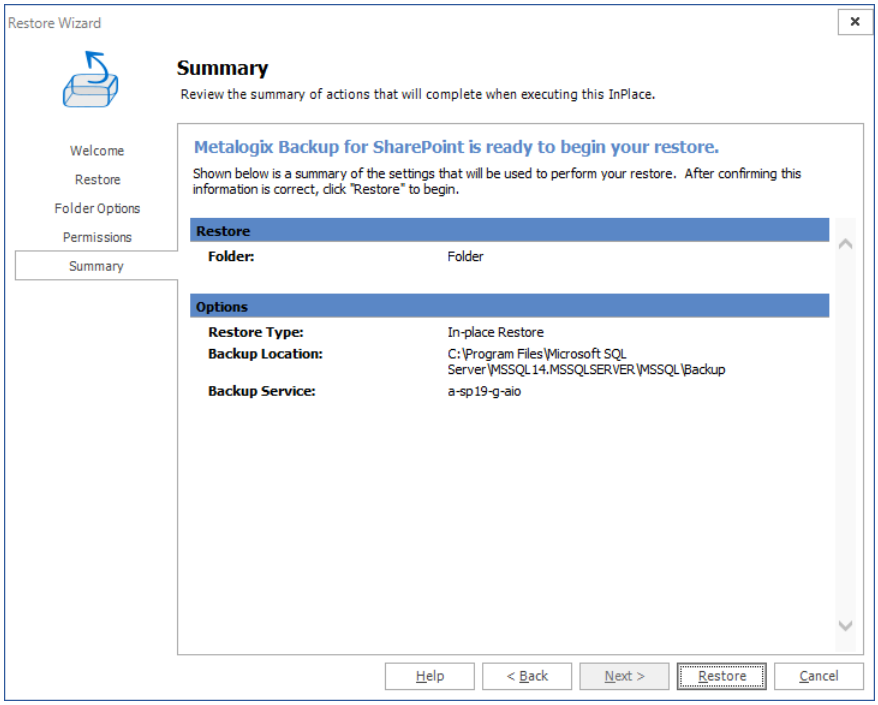


Specify which permissions you would like to copy:

a. **Copy Item Permissions**: Unique permissions to the specific list or library items are going to be restored. This option is not checked by default.

b. **Copy Folder Permissions**: Unique permissions for the folder and child folders are going to be restored. This option is not checked by default, you can choose to copy items, folders, and list permissions.

13. Click **Next**. The **Summary** step appears.

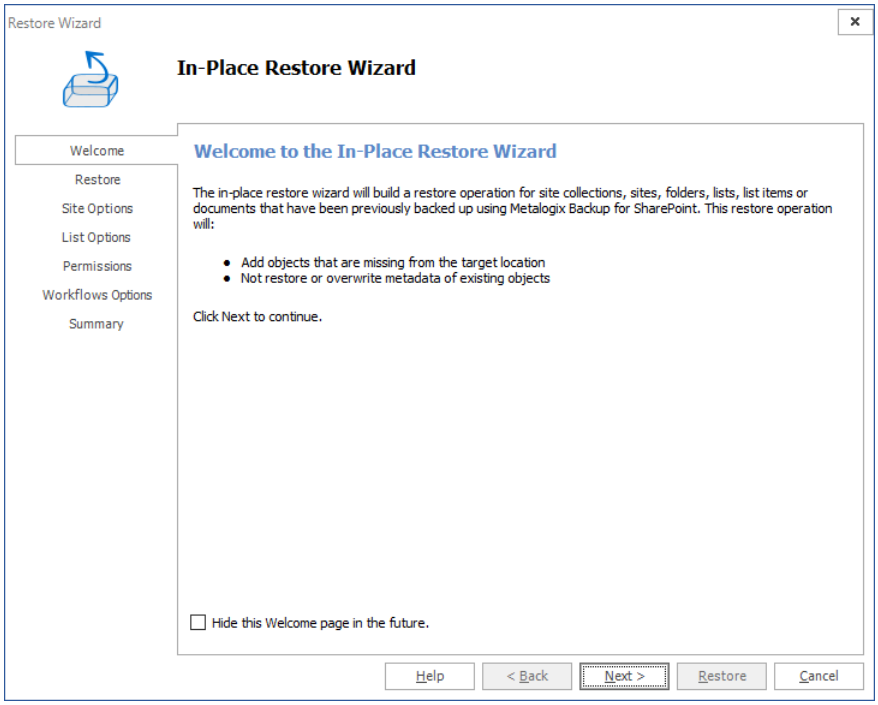


14. Review the restore settings, then click **Restore**.

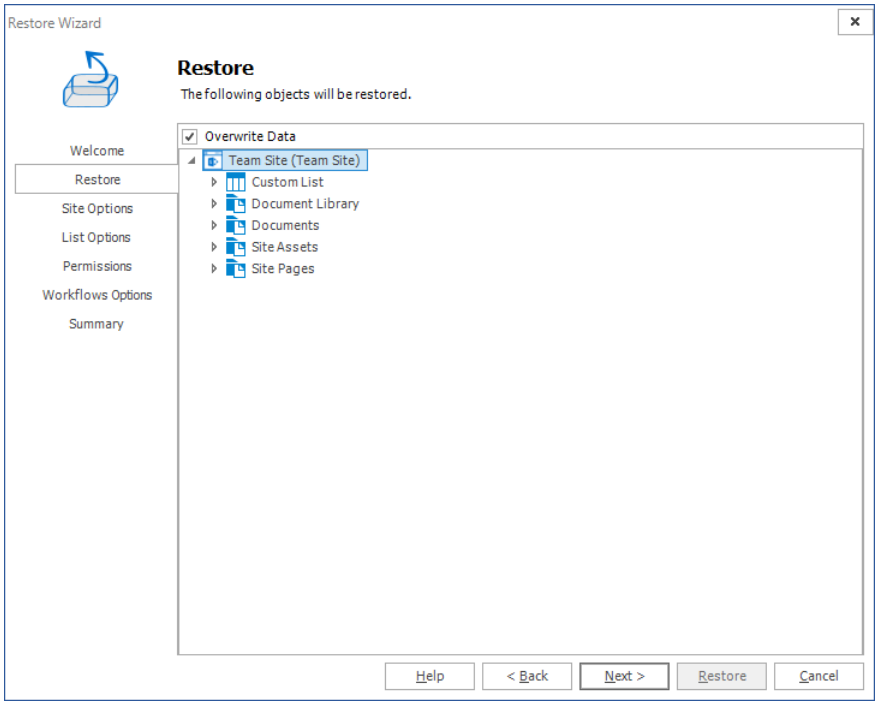
Restoring Sites or Web Sites

Follow the following steps to restore sites and web sites:

1. In From the Management Console workspace selector click **Granular Restore**.
2. In the **Granular Restore** pane, select a farm and then select **Mounted Databases**.
3. Click the **Restore** tab.
4. In the ribbon, select a Restore Type: **In-place**, **Out-of-place** or **Local.**
5. In the **Backup Sets** pane, click the backup set from where you want to restore content.
6. In the **Backup Content** area, select the check boxes for the *sites* or *web sites* to restore. You can also use the search box to search for the *site* or *web site* names that start with the expression entered in the search box.
7. In the ribbon, click **Restore.** Depending on your choice of Restore Type, the **In-Place Restore Wizard**, **Out-of-Place Restore Wizard** or **Local Restore Wizard** opens.
8. In the **Welcome** step you can select the **Hide this Welcome page in future** to skip this step the next time you invoke the wizard.



9. Click **Next**. The **Restore** step, review the objects to restore, then click **Next** to continue. If you want to overwrite all the objects that will be restored, then select **Overwrite Data**.



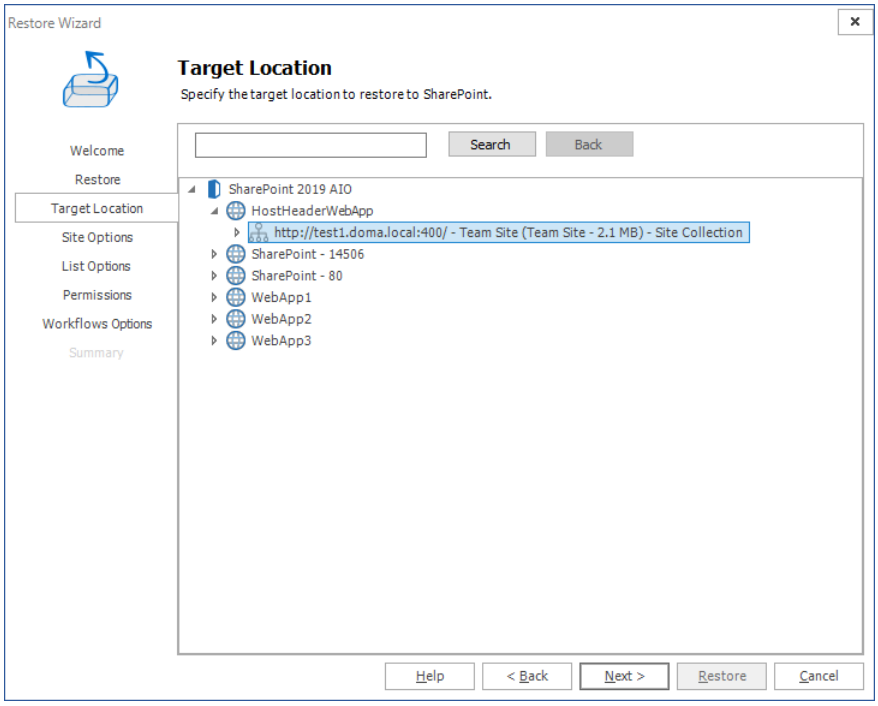
10. Click **Next**. The **Target** step, specify the target location for where you want your restore to occur (this option is only available when the restore is done out-of-place or to a local folder). You can specify a target in the search field when you have a large number of targets.

> **NOTE:** This option is only available when you perform an out-of-place restore, or a restore to a local folder.

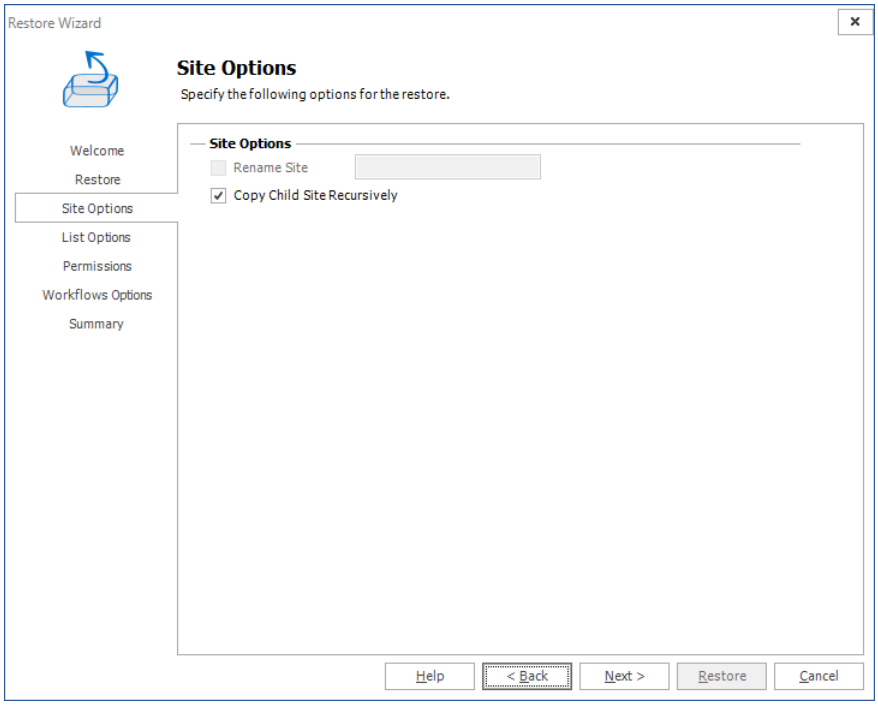
For **in-place** and **out-of-place** restore types, Metalogix Backup for SharePoint displays a tree selection model based on the objects you selected to restore so you can select only valid places to restore those objects. You must have the appropriate permissions in the target SharePoint site.

For the local restore type, specify the folder where you want Metalogix Backup for SharePoint to restore the local copy of the files.

For more information and additional important considerations, see Understanding the granular restore process.



11. Click **Next**. The **Site Options** step appears.

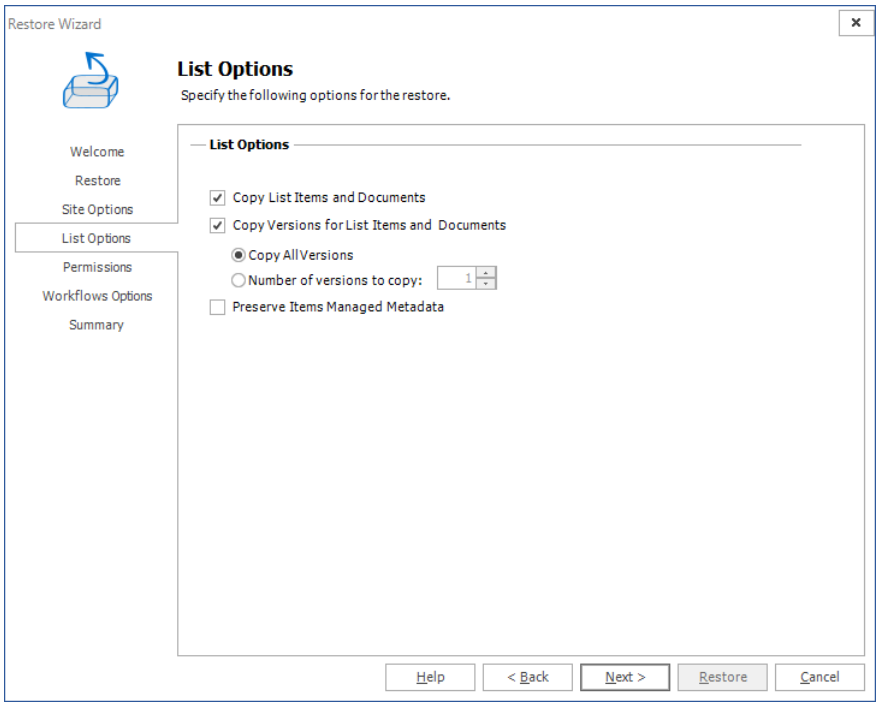


Choose from the following options:

a. **Rename Site**: (enabled only in the out-of-place restore wizard or if restoring to a local folder) Gives a new name for the Site on the destination. If this option is checked, the text box on the right is enabled and then a valid name for a site has to be entered.

b. **Copy Child Site Recursively**: This option allows child Sites to be copied recursively, down through any existing levels.

12. Click **Next**. The **List Options** step appears.



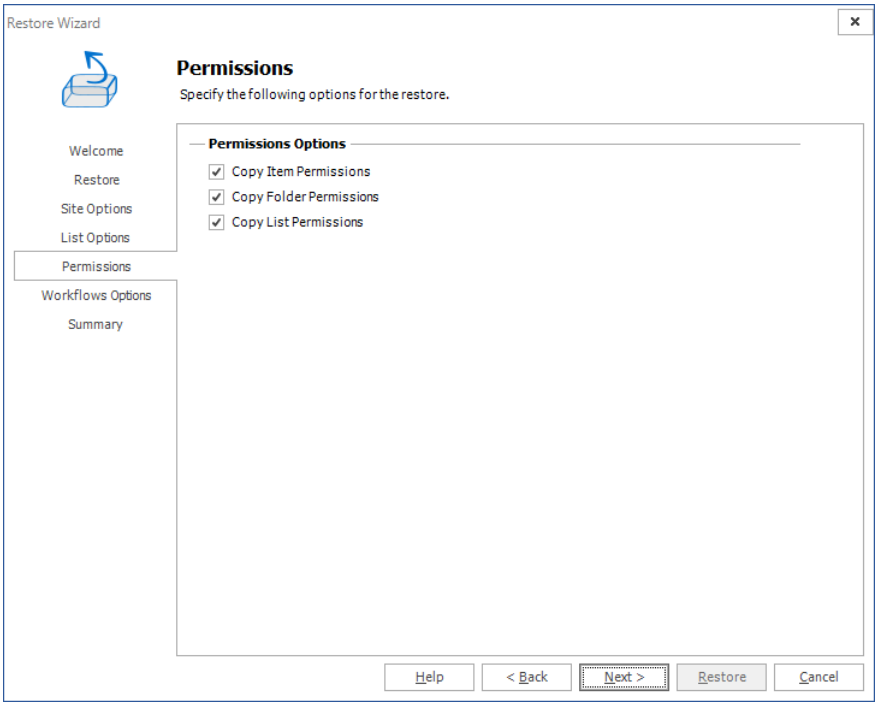
Choose from the following options:

a. **Copy List Items and Documents**: Include the content of the selected site to be restored on the destination. If this option is not checked, then just the basic structure for a site will be restored.

b. **Copy Versions for Lists Items and Documents**: This option allows users to include major and/or minor versions of the content. For this feature to work, versioning must be enabled on the target destination. By default **Copy all versions** is selected. If the end user wants to copy just some versions, they must check the radio button Number of versions to copy and enter the number of version to use on the restore.

c. **Preserve Items Managed Metadata** - must be checked if the metadata information related to term sets should be preserved.

13. Click **Next**. The **Permissions** step appears.



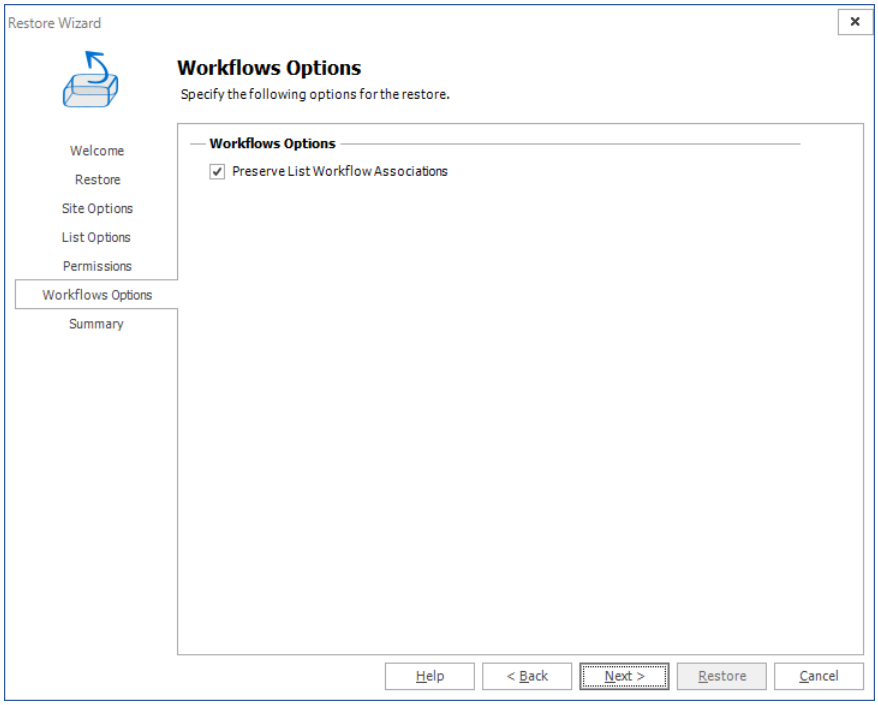
Choose from the following options:

a. **Copy item Permissions**: Permissions unique to the specific list or library items are going to be restored.

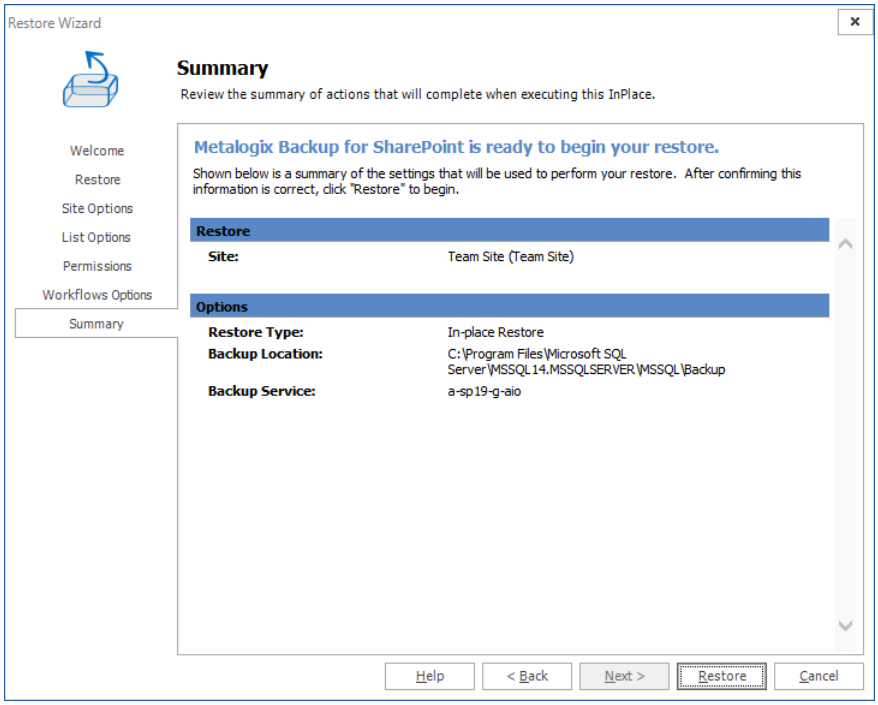
b. **Copy Folder Permissions**: Permissions unique to the folder and child folders are going to be restored.

c. **Copy List Permissions**: Permissions unique to the list are going to be restored.

14. Click **Next**. The **Workflow Options** step appears. You can choose whether you would like to preserve list workflow associations. By selecting **Preserve List Workflow Associations**, you are choosing to keep Workflow content types on the content being copied.



15. Click **Next**. The **Summary** step appears.



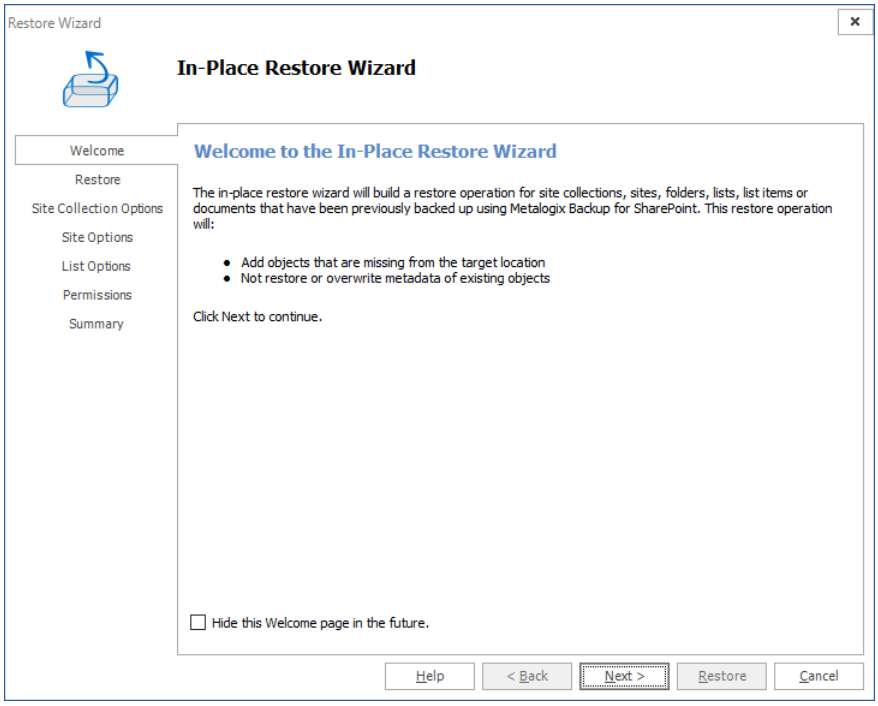
16. Review the restore settings and click **Restore**.

Restoring Site Collections

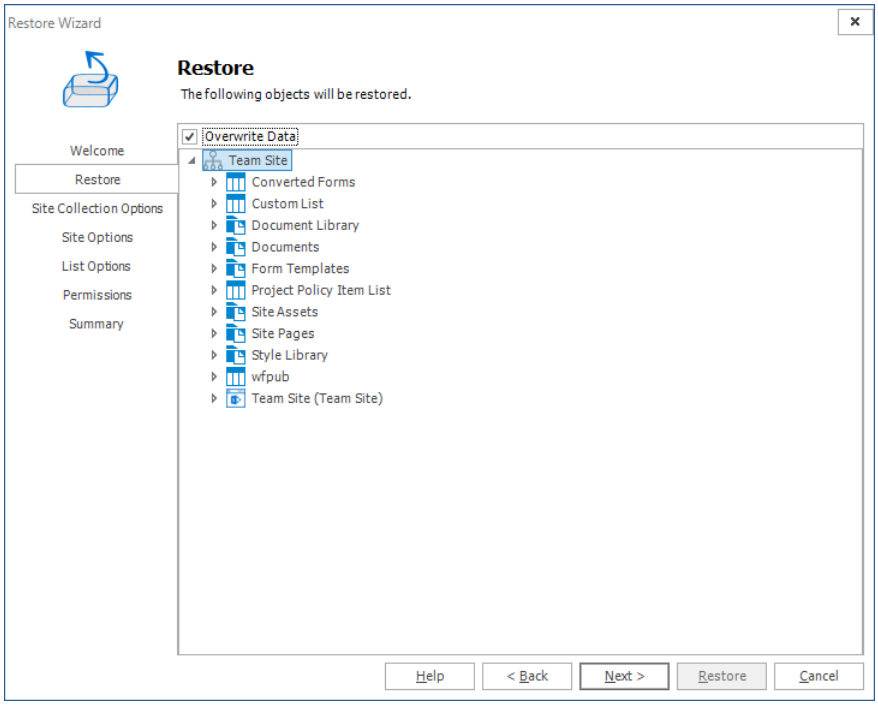
Follow the following steps to restore site collections:

1. From the Management Console workspace selector click **Granular Restore**.
2. In the **Granular Restore** pane, select a farm and then select **Mounted Databases**.

3. Click the **Restore** tab.
4. In the ribbon, select a Restore Type: **In-place**, **Out-of-place** or **Local.**
5. In the **Backup Sets** pane, click the backup set from where you want to restore content.
6. In the **Backup Content** area, select the check boxes for the *site collection* to restore. You can also use the search box to search for the *site collection* that starts with the expression entered in the search box.
7. In the ribbon, click **Restore.** Depending on your choice of Restore Type, the **In-Place Restore Wizard**, **Out-of-Place Restore Wizard** or **Local Restore Wizard** opens.
8. In the **Welcome** step you can select the **Hide this Welcome page in future** to skip this step the next time you invoke the wizard.

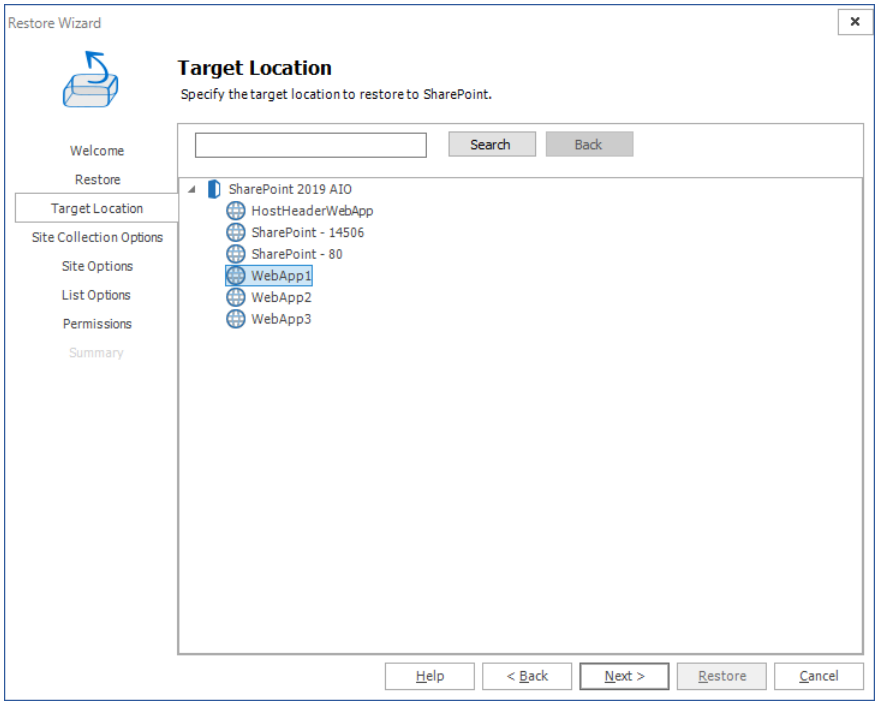


9. Click **Next**. The **Restore** step appears. Review the objects to restore. If you want to overwrite all the objects that will be restored, then select **Overwrite Data**.

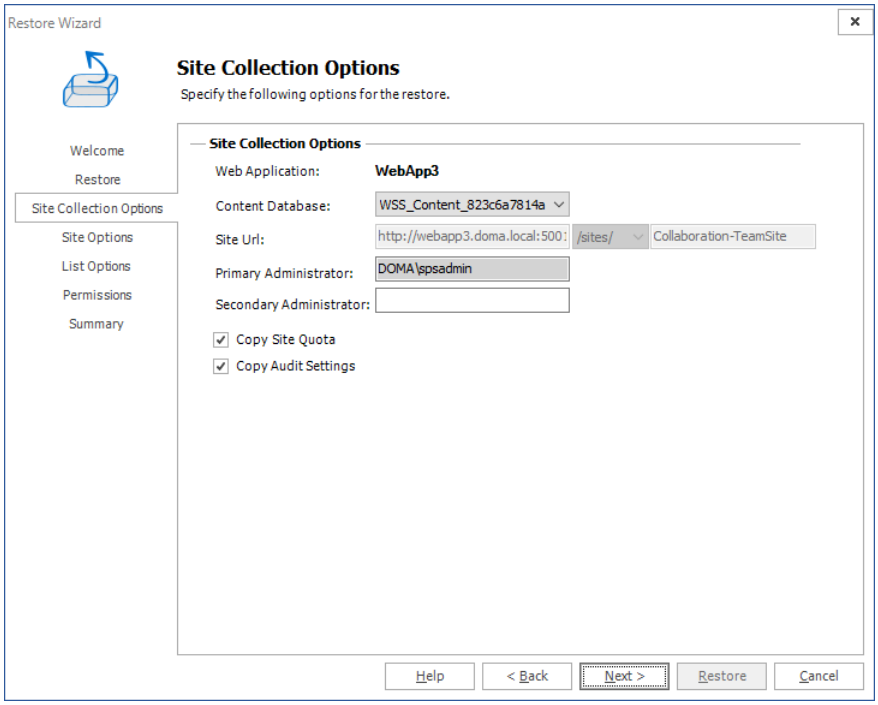


10. Click **Next**. The **Target** step, specify the target location for where you want your restore to occur (this option is only available when the restore is done out-of-place or to a local folder). You can specify a target in the search field when you have a large number of targets.

> **NOTE:** This option is only available when you perform an out-of-place restore, or a restore to a local folder.
>
> For **in-place** and **out-of-place** restore types, Metalogix Backup for SharePoint displays a tree selection model based on the objects you selected to restore so you can select only valid places to restore those objects. You must have the appropriate permissions in the target SharePoint site.
>
> For the local restore type, specify the folder where you want Metalogix Backup for SharePoint to restore the local copy of the files.
>
> For more information and additional important considerations, see Understanding the granular restore process.



11. Click **Next**. The **Site Collection Options** step.



Choose from the following options:

a. **Web Application**: Refers to the web application were the site collection is going to be restored. By default this field shows the Web Application that was selected on the target location step.

b. **Content Database**: If the web application has several content databases, the end user must select the one where the site collection information is going to be stored. The default value is the first content database on the list of available content databases for the selected web application.

c. **Site URL**: Formulate the URL for the restored Site Collection. By default the sites value is filled with the information from the source, but the user can modify this. The last value entered needs to be a valid site name path.

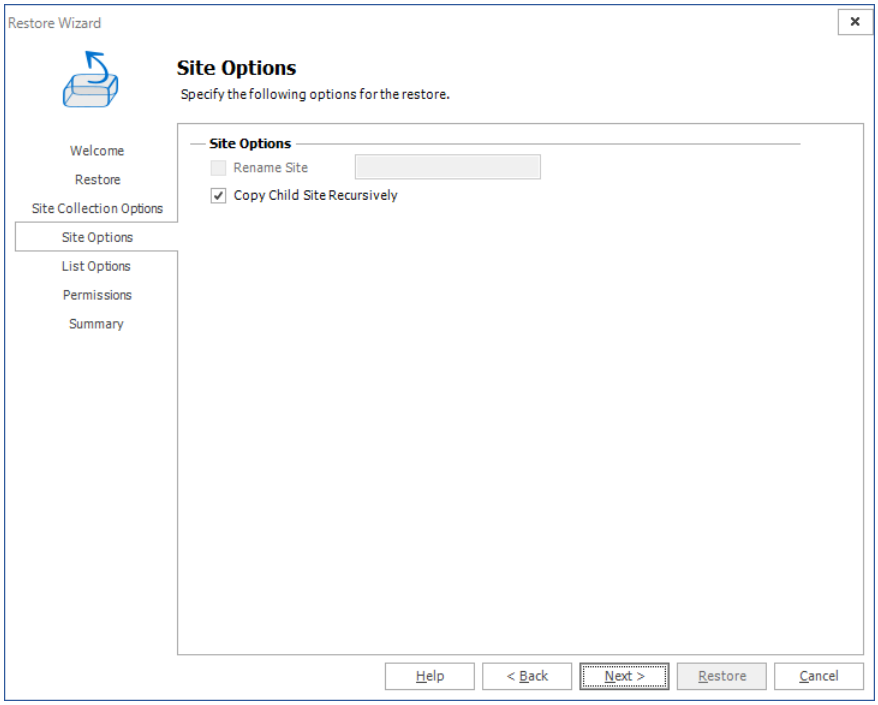
d. **Primary Administrator**: Represents the administrator of the site collection. By default the value is filled with the information from the source but the user can modify it for another administrator.

e. **Secondary Administrator**: This is an optional field. Represents the value of the secondary administrator ID for the site collection that is to be restored. By default the value is filled with the information from the source but the user can modify it for another administrator.

f. **Copy Site Quota**: This check-box option allows for the copying of the Site Quota, configured for the site collection when it was backed-up.

g. **Copy Audit Settings**: This check-box option allows for the preservation of a SharePoint Site Collection's audit settings.

12. Click **Next**. The **Site Options** step appears.

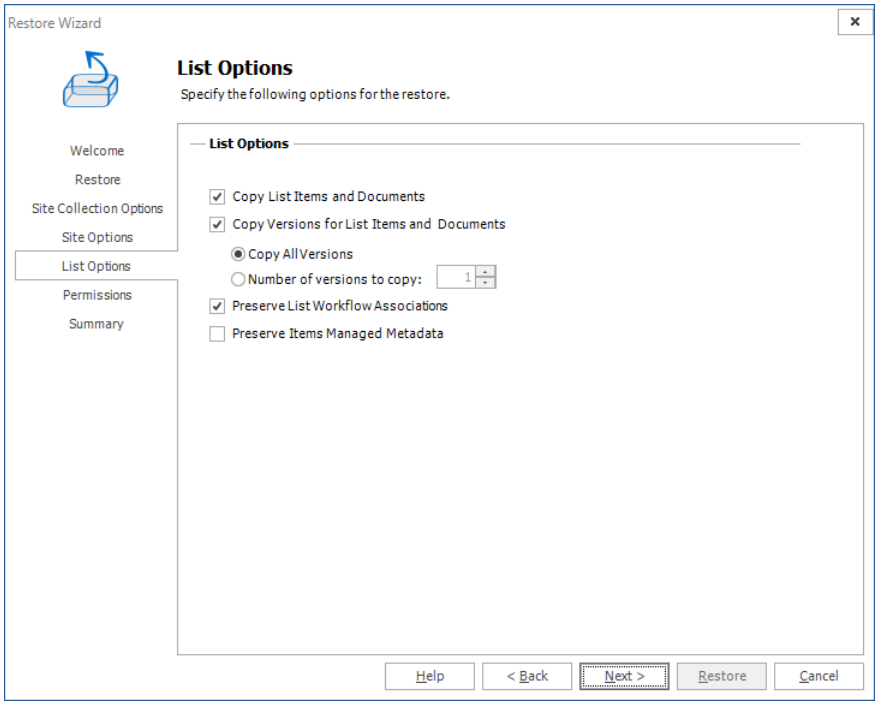


Choose from the following options:

a. **Rename Site**: (enabled only in the out-of-place restore wizard or if restoring to a local folder) Gives a new name for the Site on the destination. If this option is checked, the text box on the right is enabled and then a valid name for a site must be entered.

b. **Copy Child Site Recursively**: This option allows child Sites to be copied recursively, down through any existing levels.

13. Click **Next**. The **List Options** step appears.



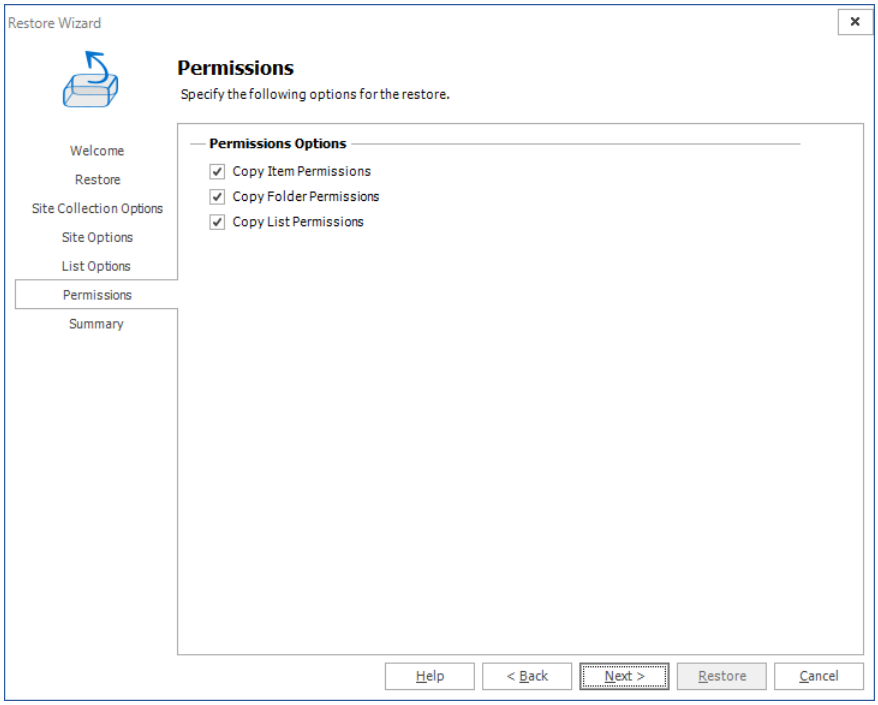
Choose from the following options:

a. **Copy List Items and Documents**: Include the content of the selected site to be restored on the destination. If this option is not checked, then just the basic structure for a site will be restored. This option is automatically selected

b. **Copy Versions for Lists Items and Documents**: This option allows users to include major and/or minor versions of the content. For this feature to work, versioning must be enabled on the target destination. By default **Copy all versions** is selected. If the end user wants to copy only some of the versions, they must check the radio button Number of versions to copy and enter the number of version to use on the restore.

c. **Preserve List Workflow Associations**: choose whether you would like to preserve list workflow associations. This option is automatically selected.

14. Click **Next**. The **Permissions** step appears.



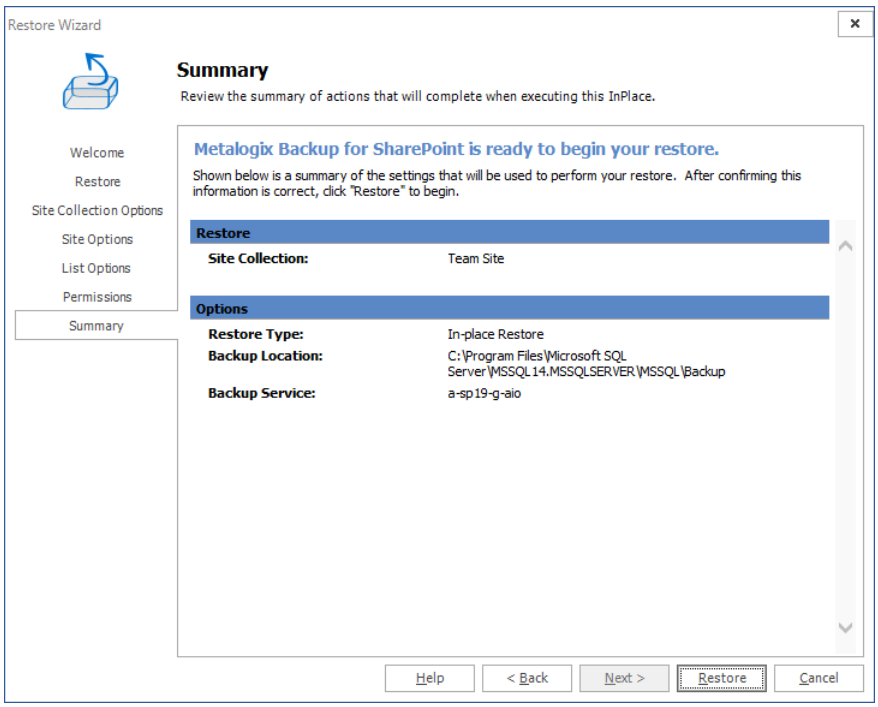
Choose from the following options:

a. **Copy item Permissions**: Permissions unique to the specific list or library items are going to be restored.

b. **Copy Folder Permissions**: Permissions unique to the folder and child folders are going to be restored.

c. **Copy List Permissions**: Permissions unique to the lists are going to be restored.

15. Click **Next**. The **Summary** step appears.



16. Review the restore settings and click **Restore**.

Using Self-Service Recovery

The Metalogix Backup for SharePoint Self-Service Recovery feature lets SharePoint site collection administrators and other users download SharePoint library items from Metalogix Backup for SharePoint to their hard disk. The administrator must install the Self-Service Recovery feature when configuring Metalogix Backup for SharePoint for the farm.

When you use the Self-Service Recovery feature, select the date range that Metalogix Backup for SharePoint uses when you view or search backup sets. You can search for documents in the backup by the full or partial name of the item that you want to find. You can also browse the site collection to view files.

The administrator can configure the maximum number of files that are visible when you browse or search for files. The larger the number of files that appear, the more time that it takes SharePoint to display them. Your administrator may restrict the number or files that appear in order to improve SharePoint performance. If you perform a search, use a more-restrictive search that displays fewer items.

What files can a user view and download from the Self-Service Recovery feature?

Site collection administrators can always use the Self-Service Recovery feature to download content from backup sets. Members of the site collection administrators group can view and download any files that Metalogix Backup for SharePoint has backed-up in the current site collection. Site collection administrators can also delegate permission to download backed-up content to specific users.

The content that delegated users can see and download depends on the following:

- The current permissions that the user has for the content.
- The permissions the user had at the time the backup was created.

To view the contents of a site or a library, the user must either have current access to the site or library, or the user must have had access at the time that the content was backed-up.

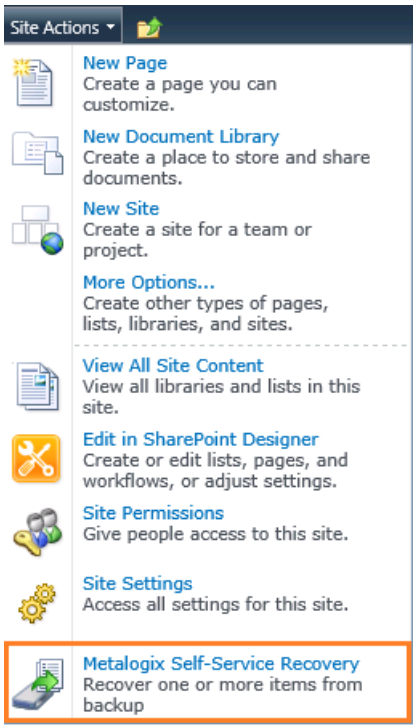
To download a backed-up file, the user must have current access and also access at the time that the file was backed-up. If either set of permissions does not allow access, the user cannot download the backed-up content.

How do I restore files with the Self-Service Recovery feature?

You use the Site Actions menu in SharePoint to access the Self-Service Recovery feature.

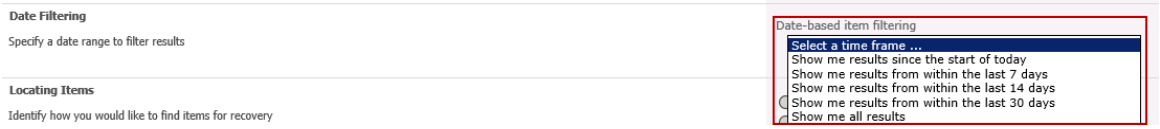
To search to restore files with the Self-Service Recovery feature, by document or item name

1. Open your SharePoint site collection or site. Click Site Actions > Self-Service Recovery.



2. In the **Self-Service Recovery** page, determine the backup set from which you wish to select the document. You can choose between browsing a Content Database or browsing an older backup set.

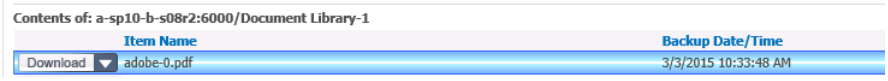
3. Select a date range to filter the backed-up content from the **Date-based item filtering** drop-down menu.



4. In the **Locating Items** area, select **I would like to search by document or item name**.

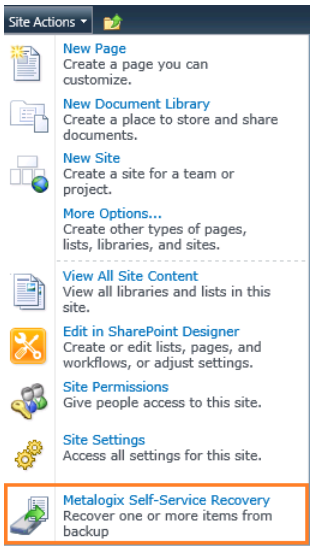
5. In the **Search Filtering** area, type the name or portion of the name to search for, then click **Search Now**.

6. The Search Results area lists the found files. Click Item Name, Location, or Backup Date/Time to sort the results. Click the file that you want to download, then click **Download**. SharePoint prompts you to open or save the file.



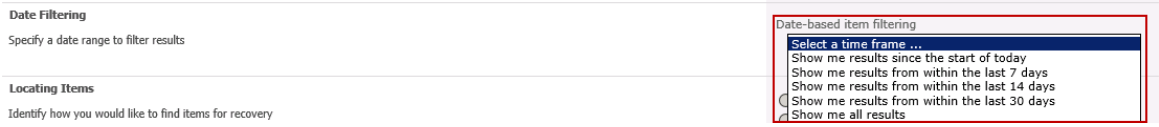
To search to restore files with the Self-Service Recovery feature, by site collection hierarchy

1. Open your SharePoint site collection or site. Click **Site Actions** > **Self-Service Recovery**.



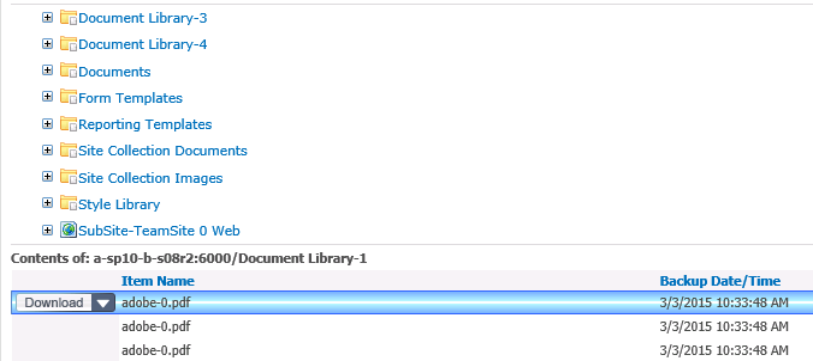
2. In the Self-Service Recovery page, determine the backup set from which you wish to select the document. You can choose between browsing a Content Database or browsing an older backup set.

3. Select a date range to filter the backed-up content from the **Date-based item filtering** drop-down menu.



4. In the **Locating Items** area, click I would like to browse the site collection hierarchy, then use the Site Collection tree to locate the folder that contains the file that you want to download.

5. The Contents area lists the files in the folder that you selected. Click Item Name or Backup Date/Time to sort the results. Click the file that you want to download, then click Download. SharePoint prompts you to open or save the file.



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About Us

Quest creates software solutions that make the benefits of new technology real in an increasingly complex IT landscape. From database and systems management, to Active Directory and Office 365 management, and cyber security resilience, Quest helps customers solve their next IT challenge now. Around the globe, more than 130,000 companies and 95% of the Fortune 500 count on Quest to deliver proactive management and monitoring for the next enterprise initiative, find the next solution for complex Microsoft challenges and stay ahead of the next threat. Quest Software. Where next meets now. For more information, visit www.quest.com.

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Technical Support Resources

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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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- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to-videos
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product