

## UniView Quick Start Guide

Release 1.3 | Document Version 2.03022022

### Getting Started with UniView

Welcome to our UniView centralized management experience! UniView allows you to manage Unitrends backup appliances, Spanning Office 365 Backup, and Unitrends Endpoint Backup all in one place. Use conditional alarms to set a threshold for how long an asset can go without a good backup or copy— so you can quickly see and respond to backup issues.

To start using UniView, simply log in as described in "[To log in to UniView for the first time](#)". Upon logging in, you can access your entire suite of Unitrends backup products. See these topics to explore your UniView environment:

- "[Accessing UniView](#)"
- "[Working with the System module](#)"
- "[Accessing Unitrends Endpoint Backup](#)"
- "[Accessing the Unitrends Backup Portal](#)"
- "[Accessing Spanning Office 365 Backup](#)"
- "[Working with conditional alarms](#)"

### Accessing UniView

Use these procedures to access and exit UniView:

- "[To log in to UniView for the first time](#)"
- "[To log out of UniView](#)"

#### To log in to UniView for the first time

**Notes:**

- To log in, you will need the username and password that was provided in your UniView Welcome Letter.

- UniView requires two-factor authentication (2FA) using a supported TOTP authenticator application, such as [Passly Authenticator](#). If you are not already using a supported authenticator application, you will need to download and install one to your iOS or Android device before you can log in to UniView.
- This procedure includes steps to pair UniView with your authenticator application and to change your password. These steps are required the first time you log in only.

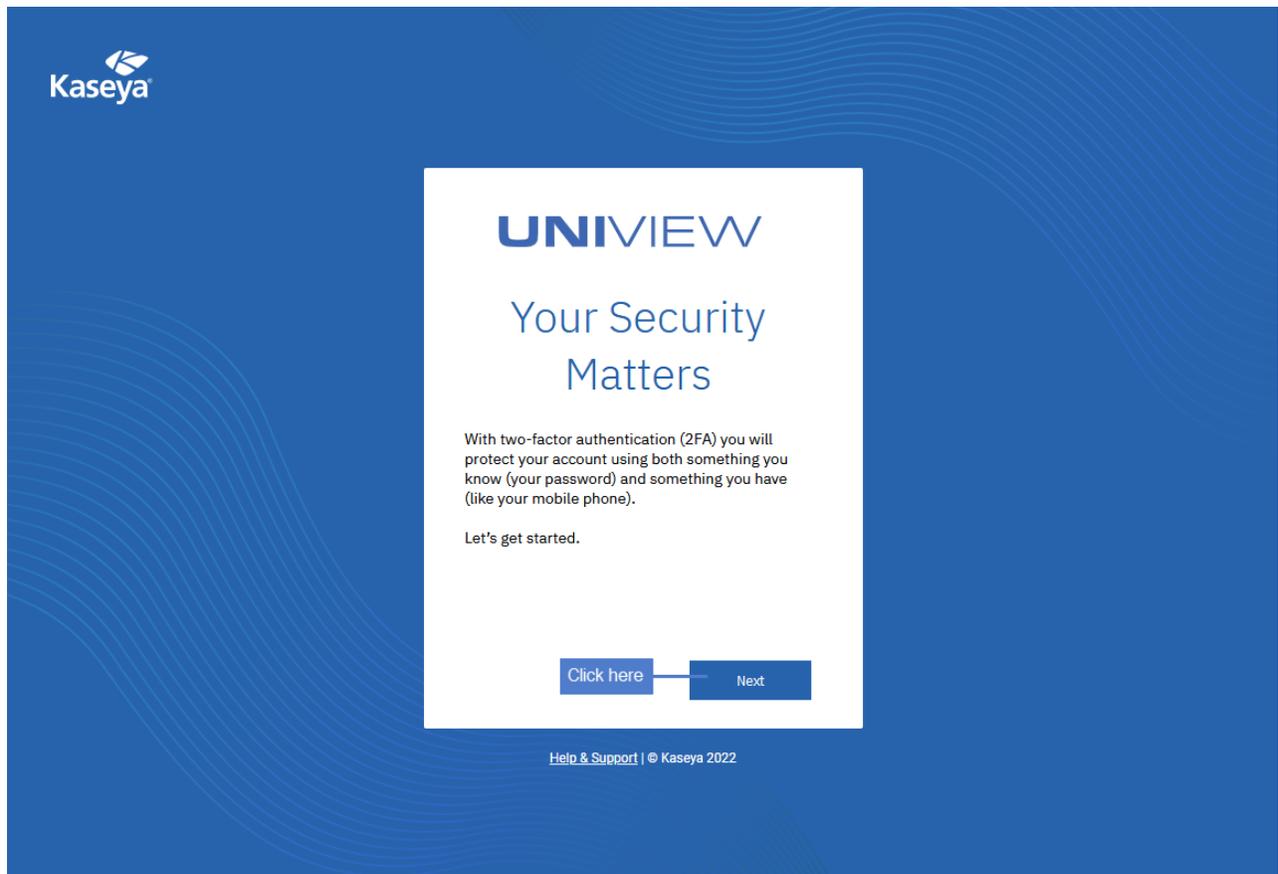
- 1 Open a browser and connect to UniView by entering this URL: ***https://portal.backup.net***.



- 2 Enter the username and password of your UniView account, which was provided in your UniView Welcome Letter. Click **Log In**.

A screenshot of the UniView login page. The page has a blue background with a white login form in the center. The form includes fields for Username, Password, and Domain. There are three numbered callouts: 1 points to the Username field, 2 points to the Password field, and 3 points to the Log In button. The text "Enter username" and "Enter password" are next to callout 1 and 2 respectively. The "Log In" button is highlighted in blue. Below the "Log In" button is a "Remember me" checkbox and a "Log In with IT Complete" button. The Kaseya logo is in the top left corner. At the bottom of the page, there is a link for "Help & Support" and a copyright notice "© Kaseya 2022".

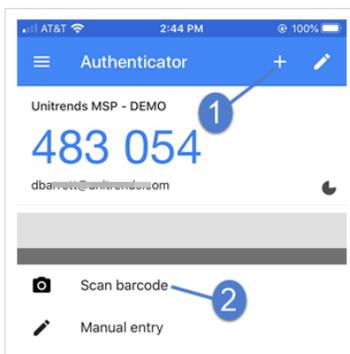
- 3 Click **Next**.



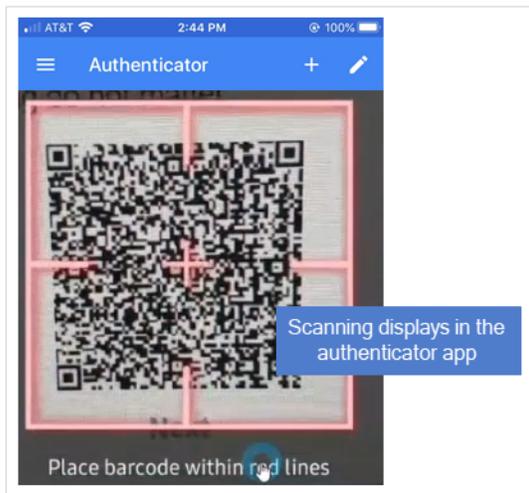
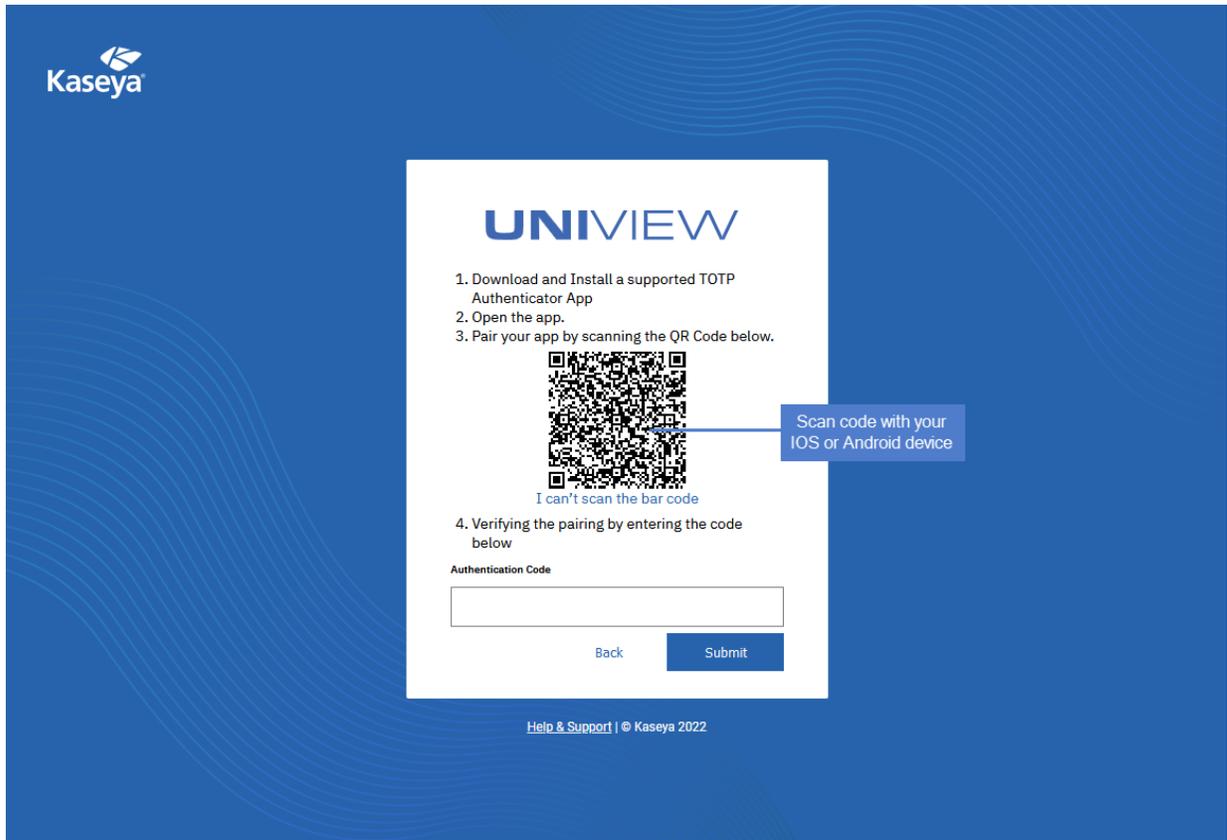
The 2FA configuration page displays.



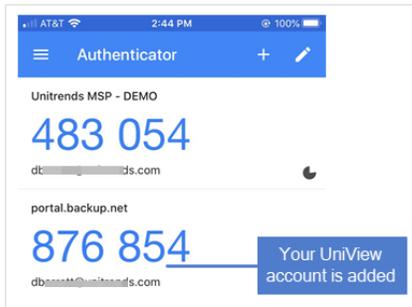
- 4 Download and install a supported TOTP authenticator application to your iOS or Android device. (Skip this step if you have already installed a supported authenticator application.)
- 5 Use these steps to pair UniView to your authenticator application:
  - Open your authenticator application. Select +, then
  - select **Scan a barcode**.



- Use your iOS or Android device to scan the QR Code that displays on the UniView 2FA configuration page.



- Your UniView account is added to the authenticator application.

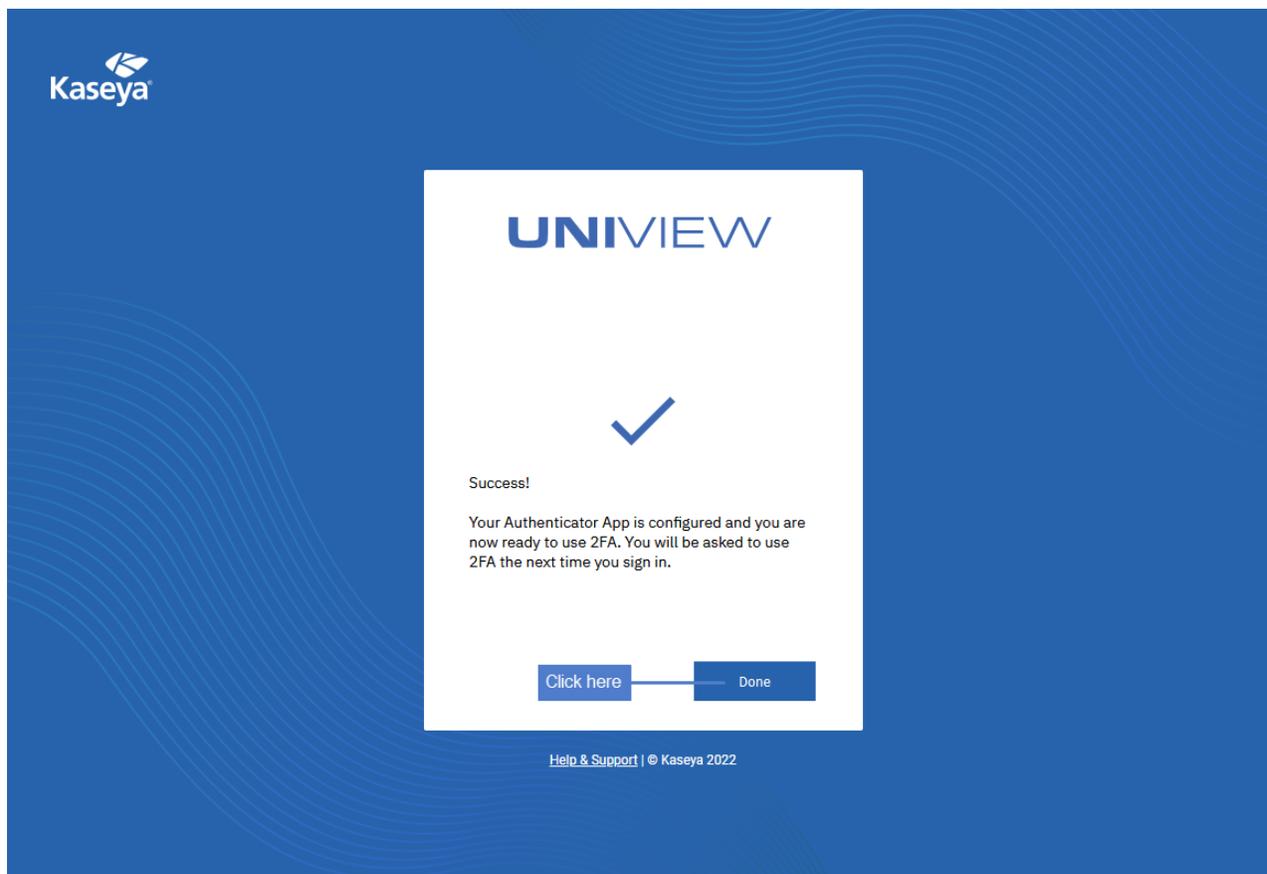


- 6 Return to UniView and enter the 2FA code supplied by the authenticator application. Click **Submit**.

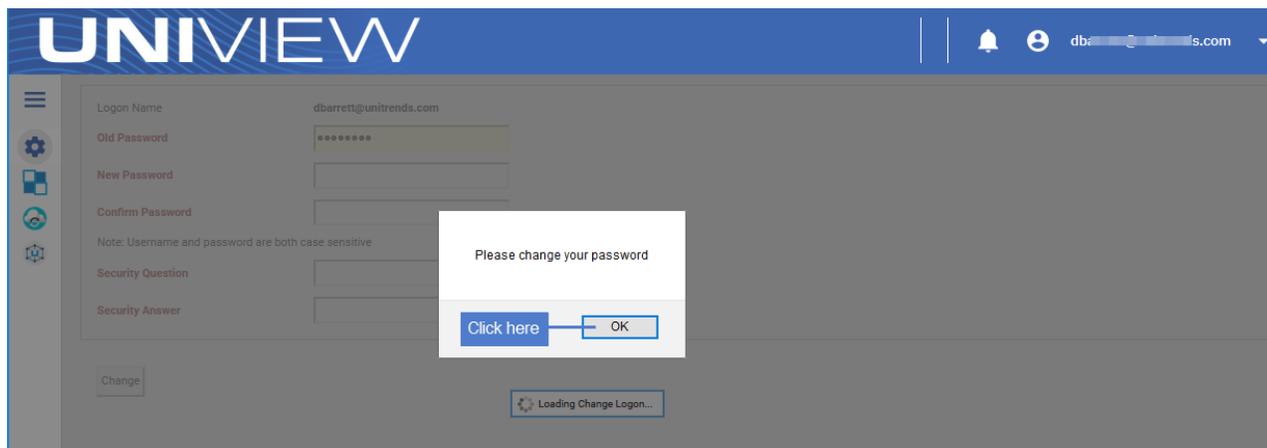
**Note:** You must enter the code within the 30-second expiration period. Otherwise, you need to enter the next non-expired code displayed in the authenticator application.



- 7 Click **Done**.



8 Click **OK**.



9 Enter password information:

- Enter a new password. Enter the password again to confirm.
- Click **Change**.
- Click **OK**.

**UNIVIEW** Search, Notifications, Help, Profile, Username, Logout

**Password rules:**

- Minimum password length is 16
- Requires upper and lower case alpha characters
- Requires both alpha and numeric characters
- Requires non-alphanumeric characters

Logon Name: do[redacted]ids.com

Old Password: [input] **1** Enter old password

New Password: [input]

Confirm Password: [input] **2** Enter and confirm new password

Note: Username and password are both case sensitive

**3** Change

Your logon information has been changed. **4** OK

10 You are logged in to UniView. Click < to expand the Navigation panel.

**UNIVIEW** Search, Notifications, Help, Profile, Username, Logout

Search Navigation

**1** System

User Settings

Preferences

**Change Logon**

UI Mode

User Security

**2** Users

Modules are expanded in the navigation panel

License Manager

Office 365 Backup

Endpoint Backup

Unitrends Backup

**Password rules:**

- Minimum password length is 16
- Requires upper and lower case alpha characters
- Requires both alpha and numeric characters
- Requires non-alphanumeric characters

Logon Name: do[redacted]ids.com

Old Password: [input]

New Password: [input]

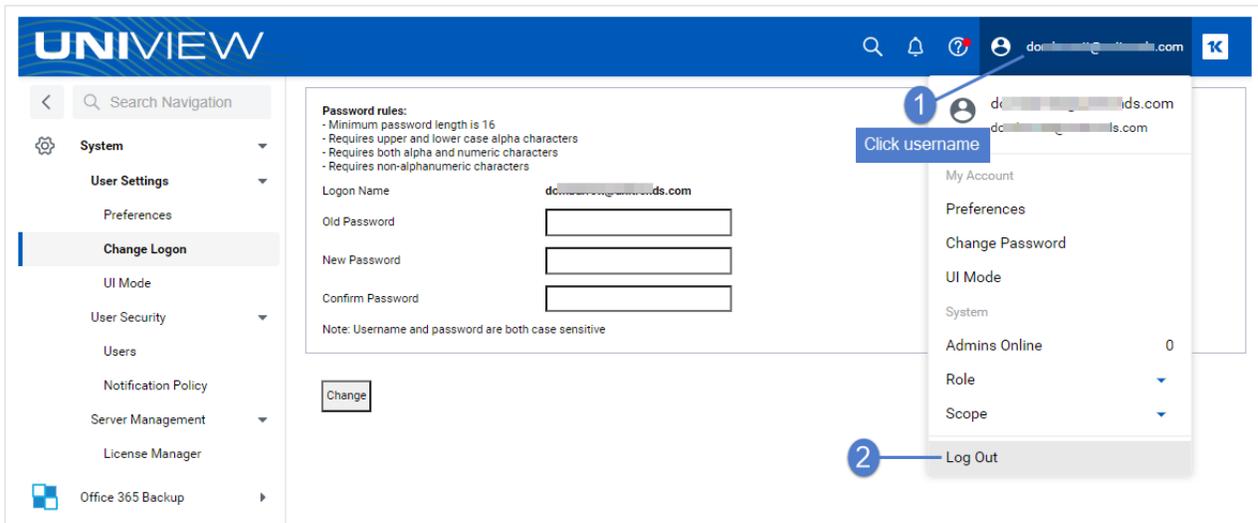
Confirm Password: [input]

Note: Username and password are both case sensitive

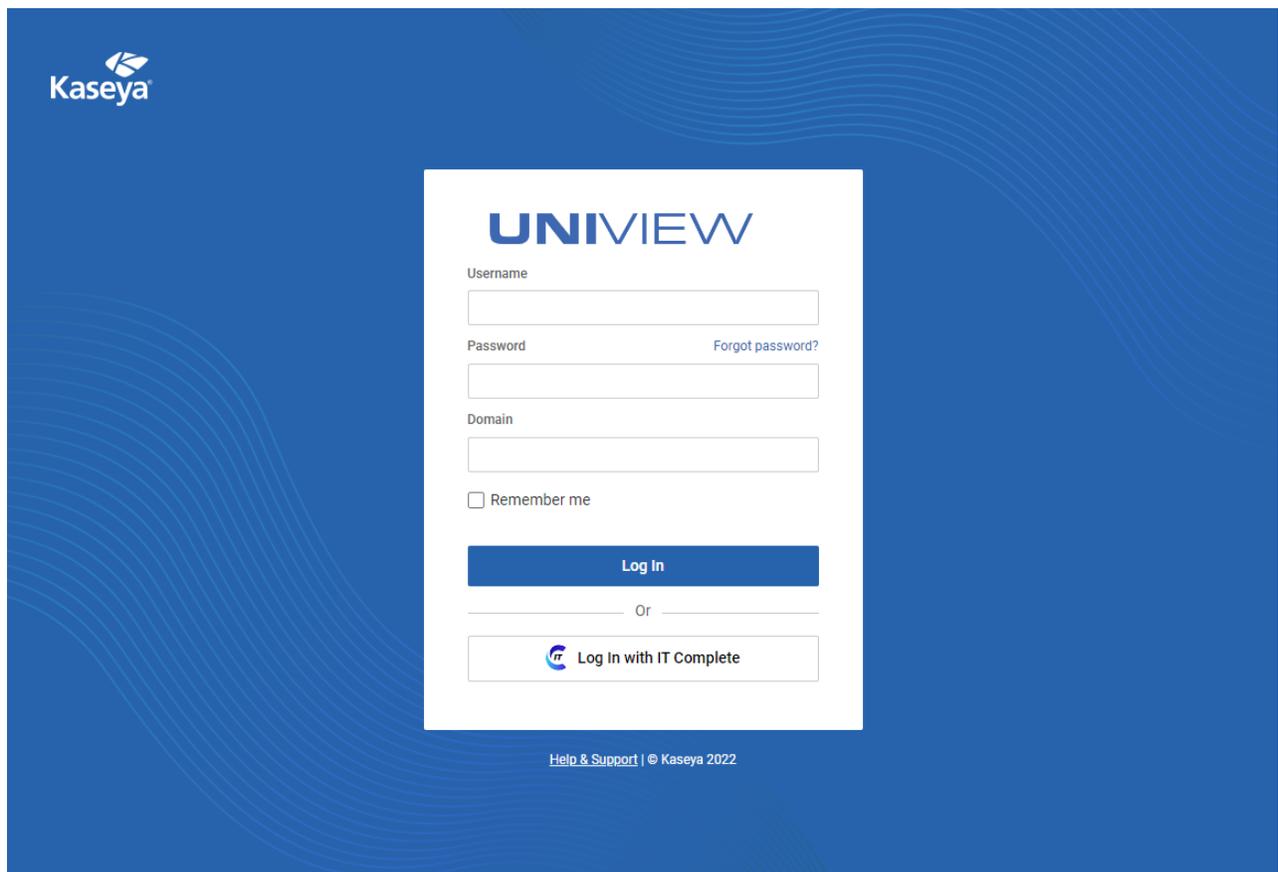
Change

## To log out of UniView

1 Click your username and select **Log Out**.



2 You are logged out and the Login page displays.



# Working with the System module

Use the System module to:

- Modify your user preferences – see ["To modify preferences"](#)
- Change your password – see ["To change your password"](#)
- Add UniView users – see ["To add a UniView user"](#)
- Update UniView modules – see ["Updating product modules"](#)

## To modify preferences

Use this procedure to modify your user preferences. (These settings apply only to the currently logged on user.)

**1** Select **System > User Settings > Preferences**.

**2** Modify any of the following:

- Set email address to deliver messages for this administrator to – Specifies the email address where alerts and other email messages will be sent. After entering the email address, click **Apply**. Previously set alerts retain the original email recipient address specified when the alerts were set.
- Set first function after logon – Select the function (page) to display upon logging on to UniView.
- Use Compact Navigation – If checked, spacing is reduced between items on the navigation panel. Changes take effect after the next logon.
- Set delay before displaying detail information when hovering over information icon  – Not applicable.
- Set delay before displaying detail information when hovering over agent icon – Not applicable.
- Select time zone offset – Select a time zone offset option, then click **Apply**.
- Set up language preferences, My language preference is – Select your preferred language. The languages available depend on the language packages installed.
- Select display format for long names – The web pages are designed to display well for typical string sizes. Occasionally data fields contain long names that do not display properly on the web pages. You can specify how long names display as follows:
  - Limit names for better page layout – This setting limits the string size to fit well on the web page. Strings exceeding a maximum length are limited with a ... Hover over the string to view the entire name in a tool tip popup.
  - Allow long name wrapping – Long strings are allowed to wrap within the web page. This may disturb the normal web page layout and names may wrap at any character position.
- Clear Snooze – Not applicable.
- Defaults – Click to reset all settings to the system defaults.

UNIVIEW

Search Navigation

System

User Settings

Preferences

Change Logon

UI Mode

User Security

Users

Notification Policy

Server Management

License Manager

Office 365 Backup

Endpoint Backup

Unitrends Backup

Set email address to deliver messages for this administrator to:

Apply [domain@domain.com]

Note: Does not update alerts or ticket notifications already set with the old email address

Set first function after logon

< Remember Last Function Visited >

Use Compact Navigation

Set delay before displaying detail information when hovering over information icon

500 msec Apply Default

Set delay before displaying detail information when hovering over agent/asset icons

1100 msec Apply Default

Modify settings

Select time zone offset

Use time zone of the browser logging into the system

Use time zone of the VSA server. Current VSA Browser time: 2:59:57 pm 28-Feb-22

Use fixed offset from the VSA server [0] hours

Apply

Set up language preferences.

My language preference is English

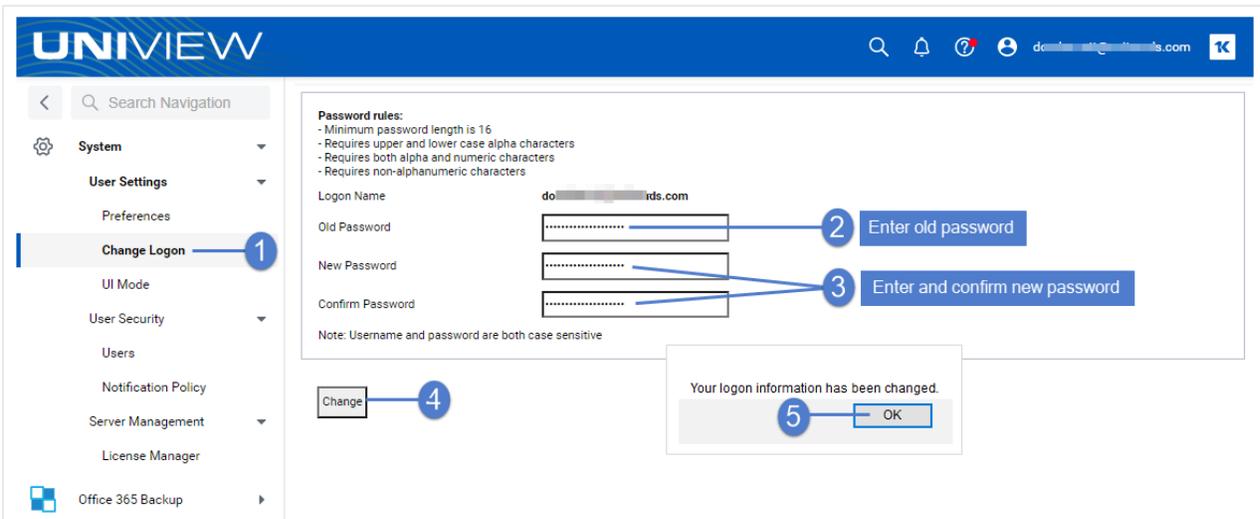
Select display format for long names

example.group... Limit names for better page layout

example.group.subgroup Allow long name wrapping

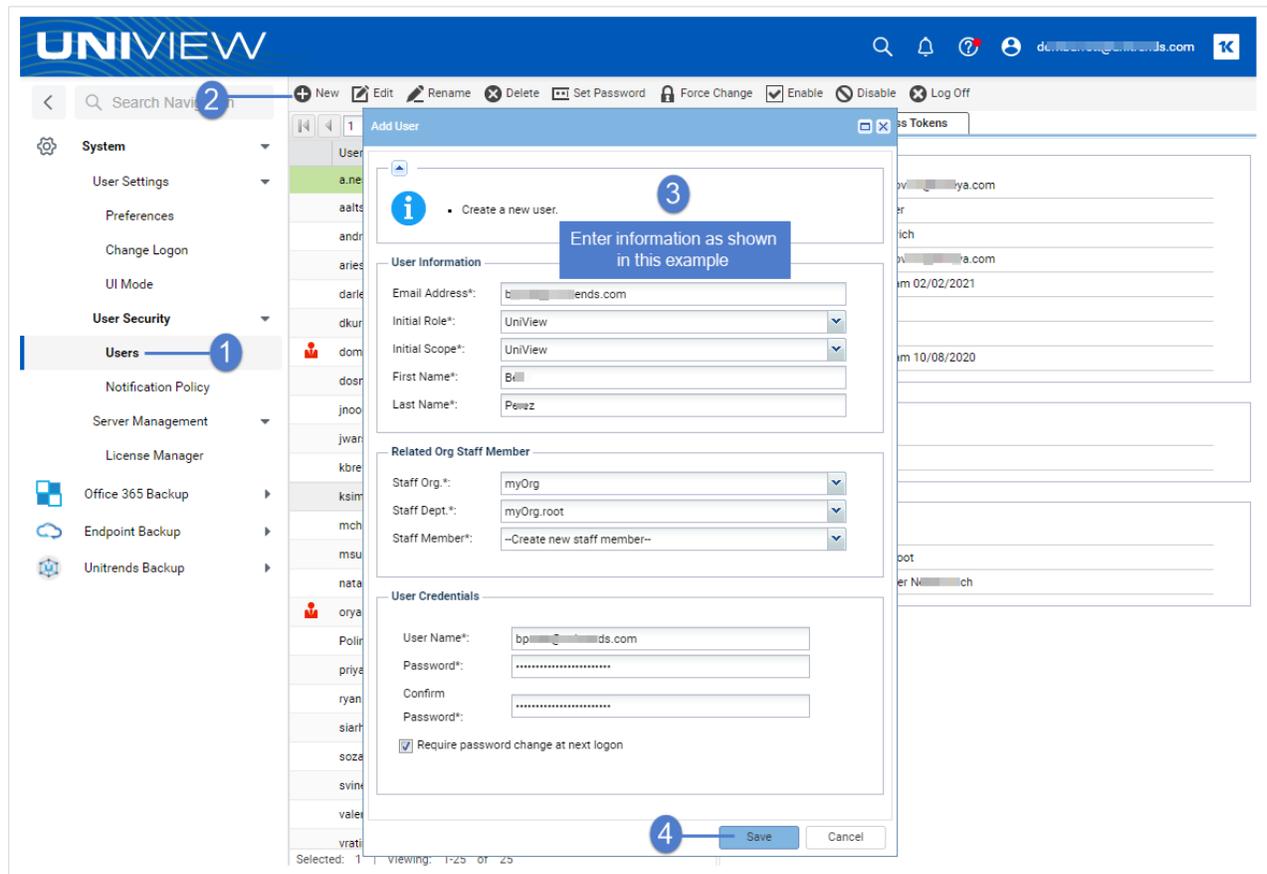
## To change your password

- 1 Select **System > User Settings > Change Logon**.
- 2 Enter the old password.
- 3 Enter a new password. Enter the password again to confirm.
- 4 Click **Change**.
- 5 Click **OK**.



## To add a UniView user

- 1 Select **System > User Security > Users**.
- 2 Click **New**. The Add User dialog box displays.
- 3 Enter **User Information**:
  - Enter an **Email Address** for the new user.
  - Select **UniView** from the **Initial Role** list.
  - Select **UniView** from the **Initial Scope** list.
  - Enter a **First Name** and **Last Name**.
- 4 Enter **Related Org Staff Member** information:
  - Select a **Staff Org**.
  - Select a **Staff Dept**.
  - Enter or select a **Staff Member** or create a new staff member record.
- 5 Define **User Credentials**:
  - Enter a **User Name**.
  - Enter a password in the **Password** and **Confirm Password** fields. Passwords are case-sensitive.
  - Check the **Require password change at next logon** checkbox to force the user to enter a new password when they first logon.
- 6 Click **Save**. The new user displays in the middle pane.



## Updating product modules

Updated product modules are typically released each month. Kaseya recommends upgrading to the latest version to benefit from new features, performance enhancements, and fixes.

Use these procedures to update the Unitrends Endpoint Backup, Spanning Office 365 Backup, or Unitrends Backup Portal product modules:

- "To update Unitrends Endpoint Backup or Spanning Office 365 Backup"
- "To update Unitrends Backup Portal"

### To update Unitrends Endpoint Backup or Spanning Office 365 Backup

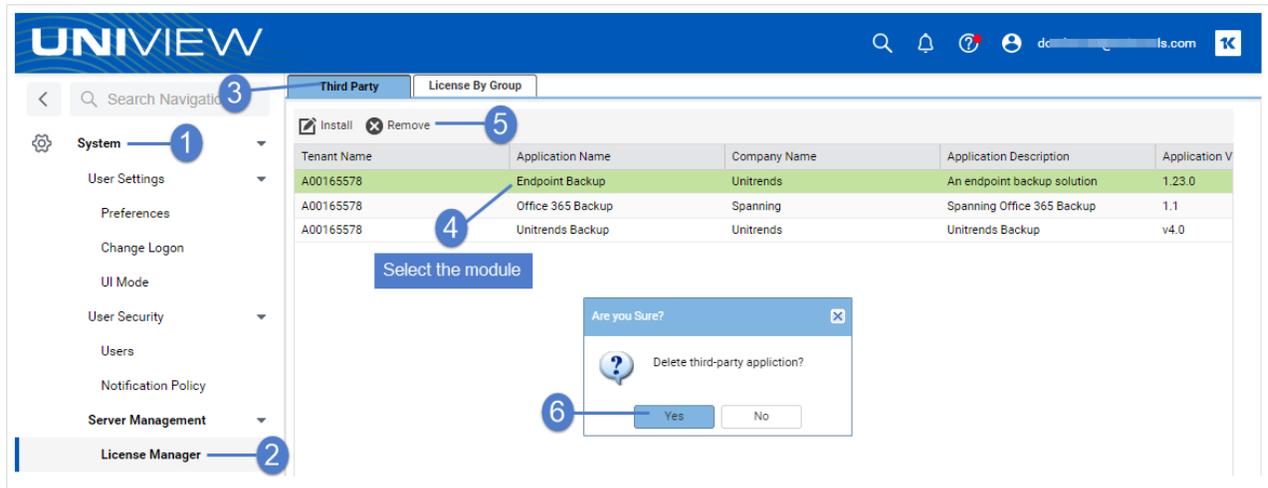
1 Download the latest product TAP module:

- Unitrends Endpoint Backup – download from [https://direct.backup.net/download/endpoint\\_backup.vsaz](https://direct.backup.net/download/endpoint_backup.vsaz)
- Spanning Office 365 Backup – download from [https://o365-vsa.s3.amazonaws.com/office\\_365\\_backup\\_ubp\\_prod.vsaz](https://o365-vsa.s3.amazonaws.com/office_365_backup_ubp_prod.vsaz)

2 Uninstall the currently installed module:

- Select **System > Server Management > License Manager > Third Party**.

- Select the row containing the module.
- Click **Remove**, then **Yes** to confirm.

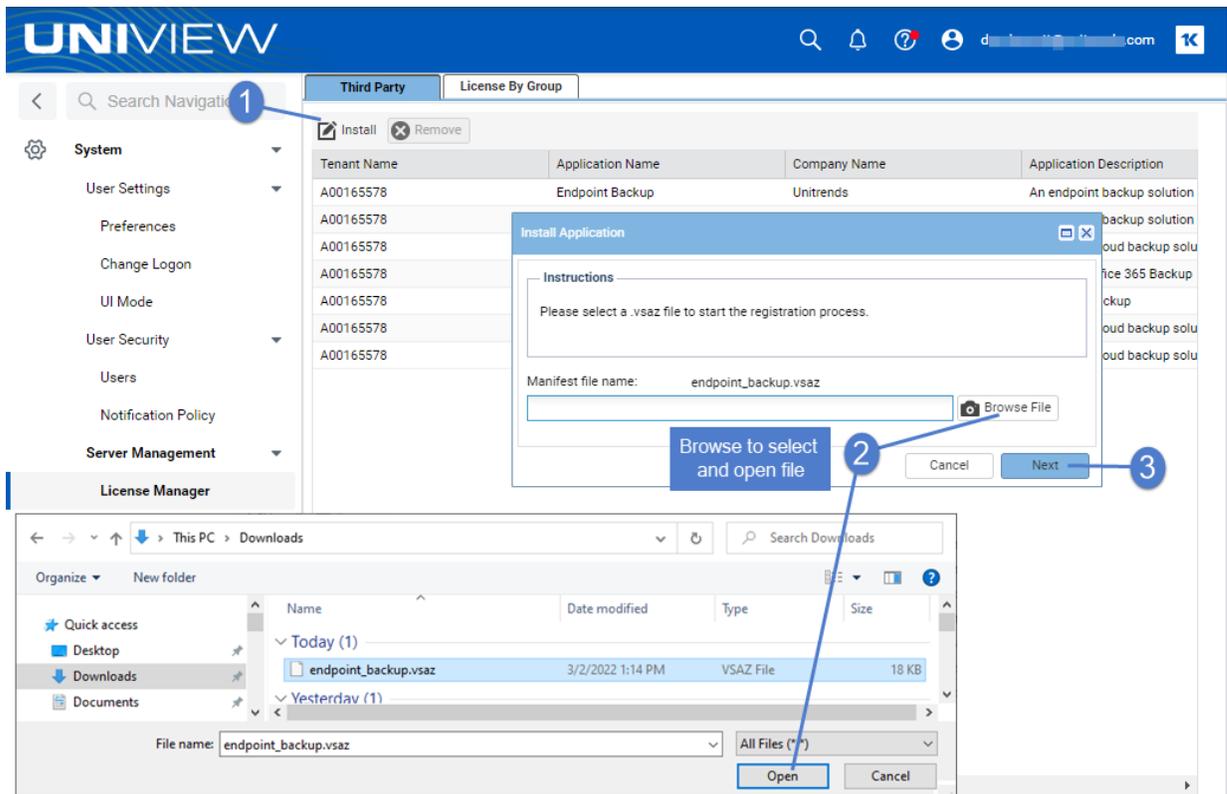


### 3 Use these steps to add the TAP module to UniView:

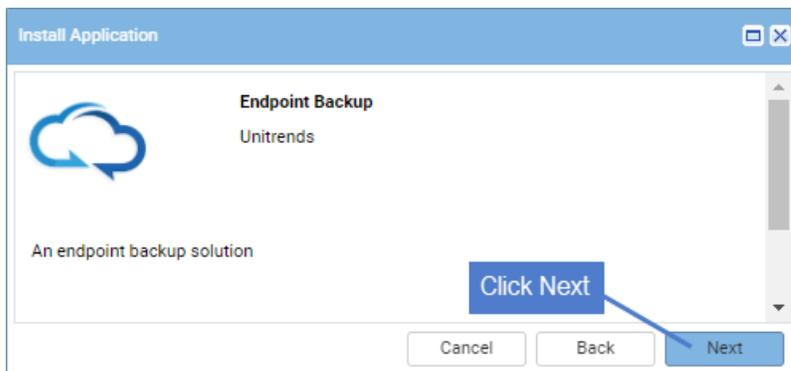
- Click **Install**. Browse to the path where you downloaded the TAP module. Select the .vsaz file.

**Note:** If there is an older .vsaz file in your downloads folder, your browser may rename the newly downloaded file. If so, be sure to change the name back to *endpoint\_backup.vsz* or *office\_365\_backup\_ubp\_prod.vsz* before proceeding with this procedure.

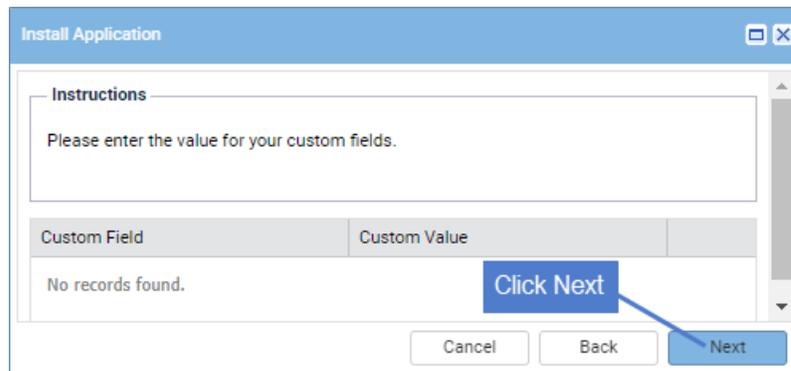
- Click **Open**. Click **Next**.



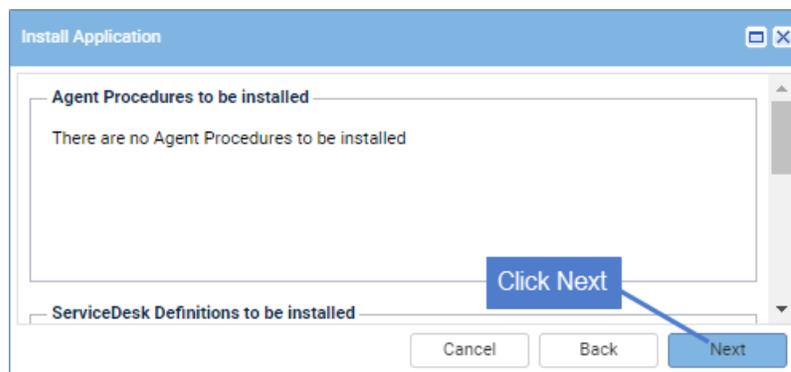
- Click Next.



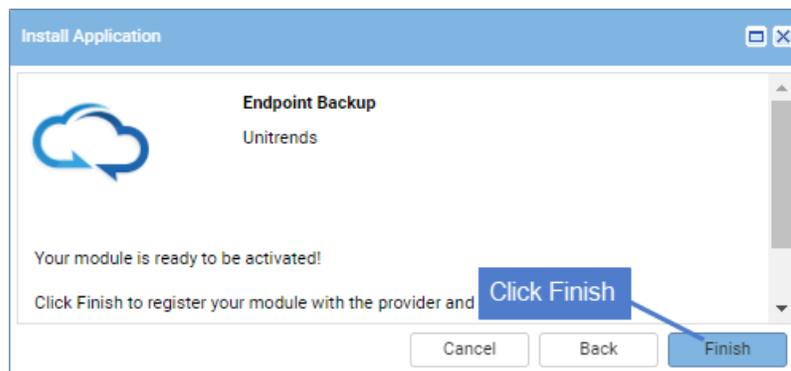
- Click Next.



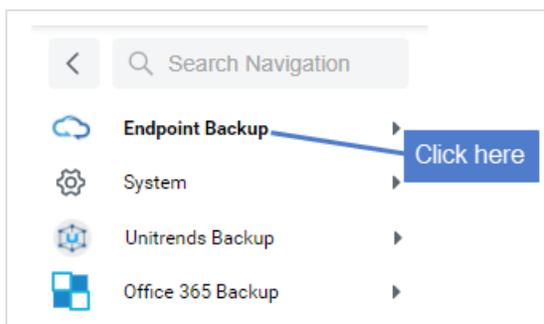
- Click **Next**.



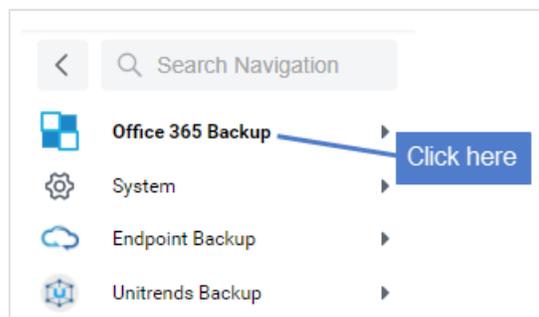
- Click **Finish**. The module is installed and activated.



- Your module is ready for use:
  - Unitrends Endpoint Backup – To access the module, select **Endpoint Backup**.

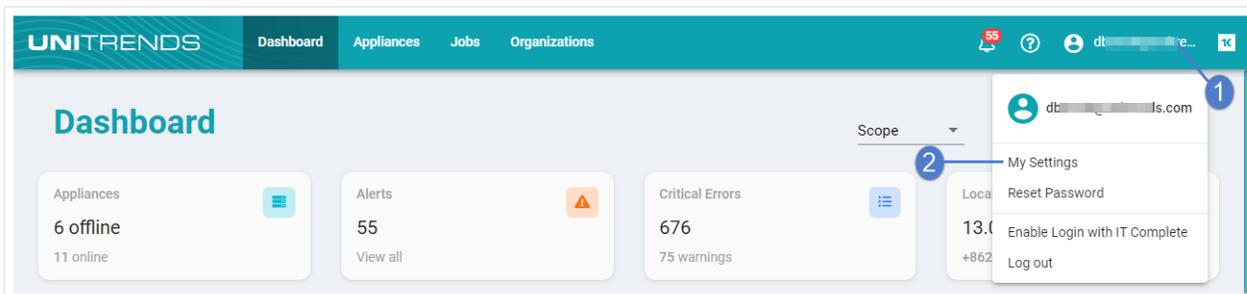


- Office 365 Backup – To access the module, select **Office 365 Backup** and , if needed, click **Allow**.

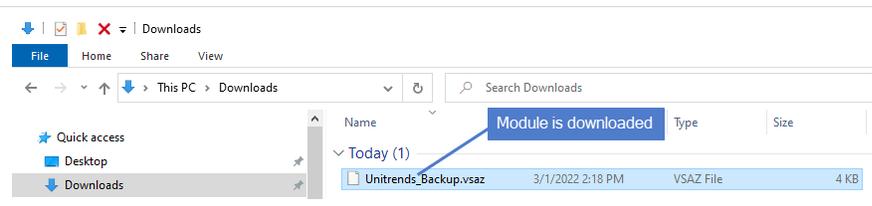
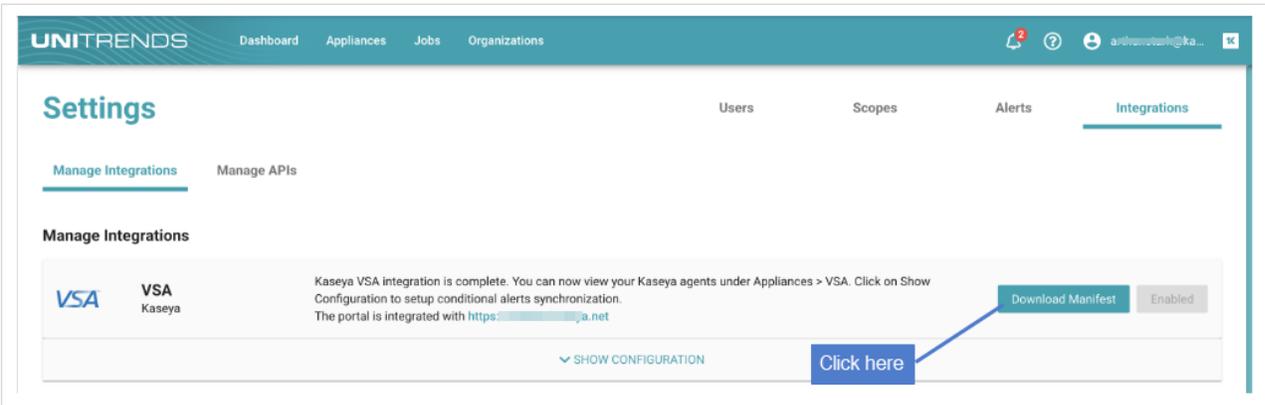


### To update Unitrends Backup Portal

- 1 Log in to the Unitrends Backup Portal. (For details, see "Accessing the Unitrends Backup Portal").
- 2 Click your user name and select **My Settings**:



- 3 Select the **Integrations** view.
- 4 Locate the VSA integration and click **Download Manifest**. The Unitrends Backup TAP module, *Unitrends\_Backup.vsaz*, is downloaded.

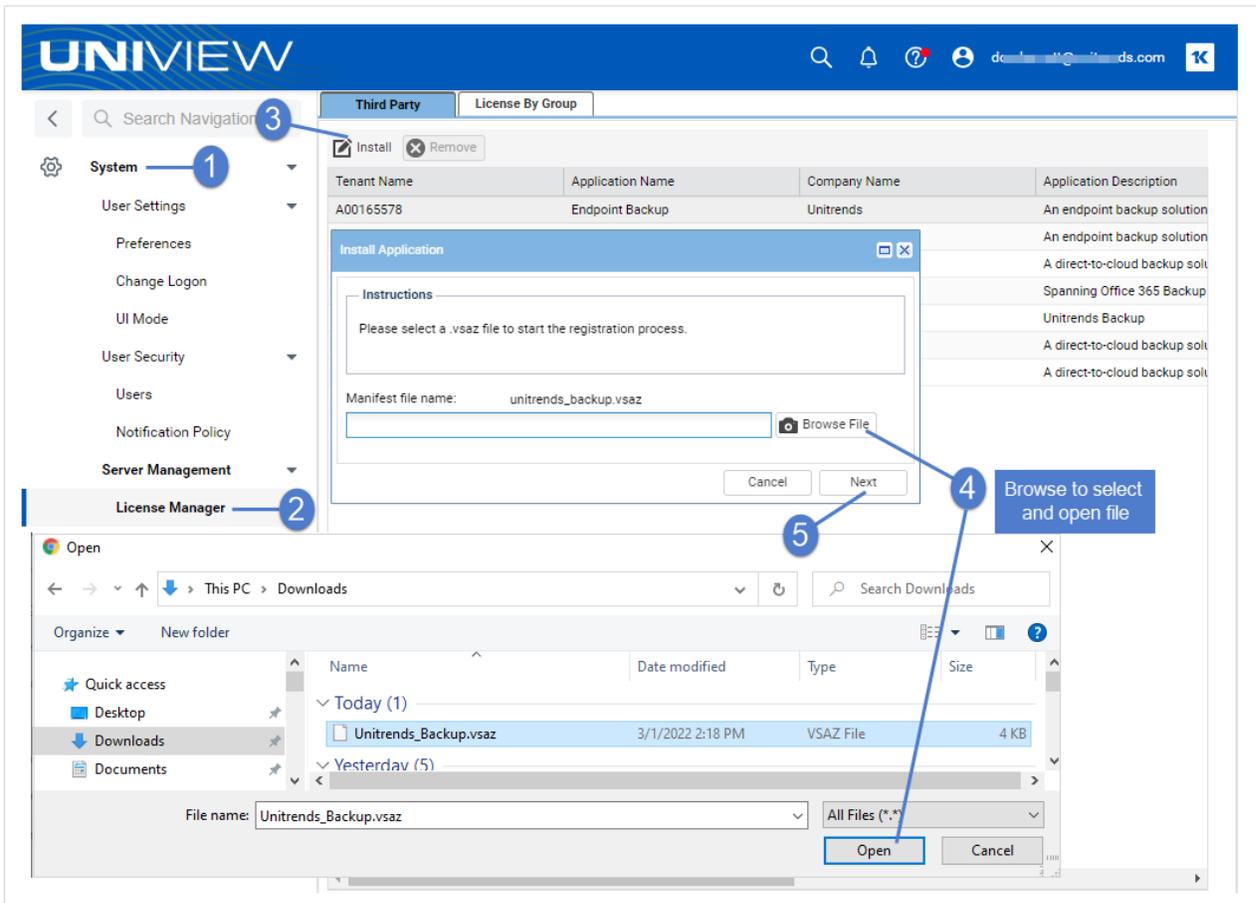


5 Use these steps to add the TAP module to UniView:

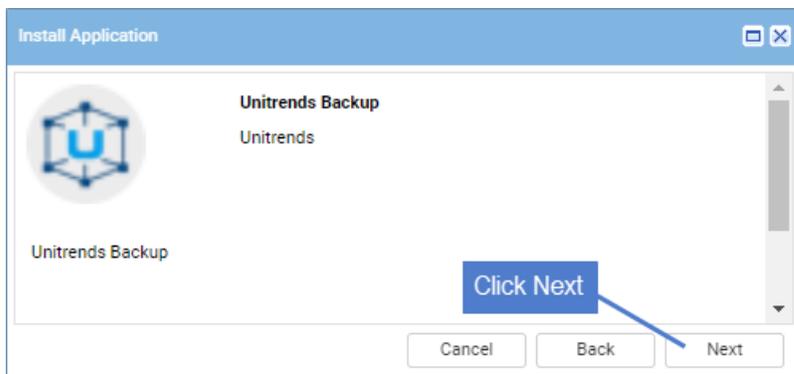
- Select **System > Server Management > License Manager > Third Party**.
- Click **Install**. Browse to the path where you downloaded the TAP module. Select the *Unitrends\_Backup.vszaz* file.

**Note:** If there is an older .vsaz file in your downloads folder, your browser may rename the newly downloaded file. If so, be sure to change the name back to *Unitrends\_Backup.vszaz* before proceeding with this procedure.

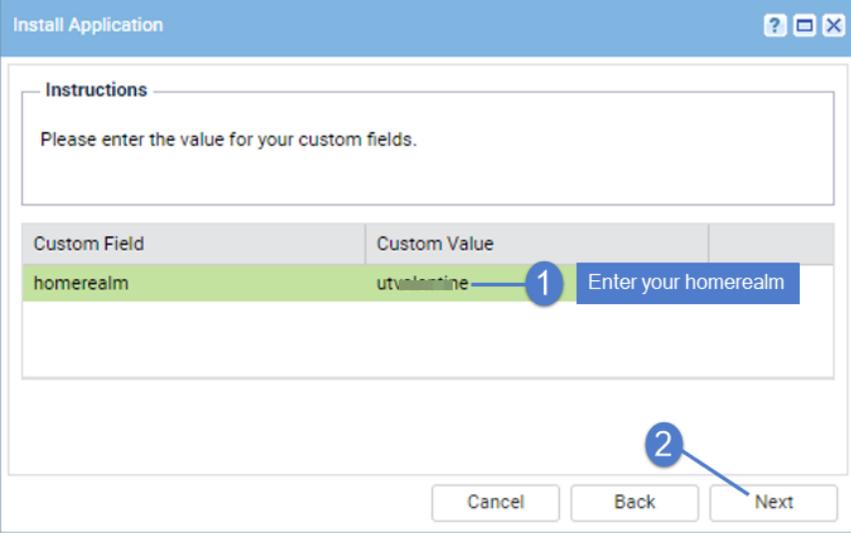
- Click **Open**. Click **Next**.



- Click **Next**.



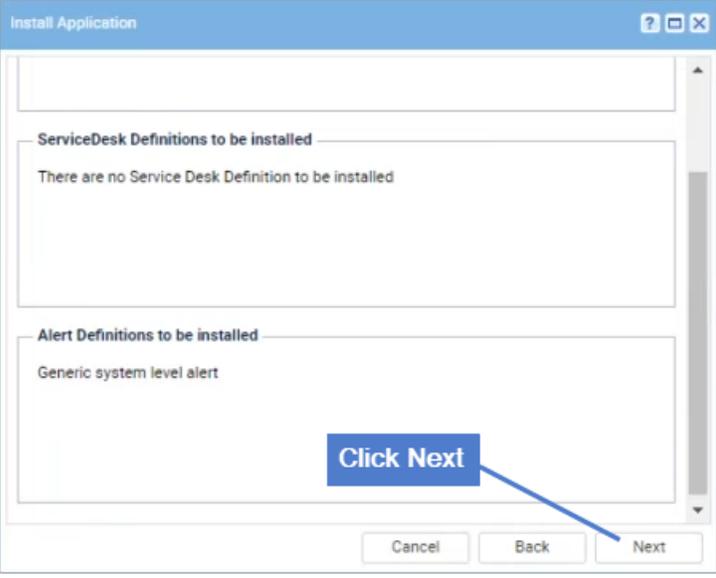
- Enter your Portal homerealm in the *homerealm* Custom Value field. Click **Next**.



The screenshot shows the 'Install Application' dialog box. It has a blue title bar with a question mark, maximize, and close icon. Below the title bar is an 'Instructions' section with the text 'Please enter the value for your custom fields.' Below this is a table with two columns: 'Custom Field' and 'Custom Value'. The first row is highlighted in green and contains the text 'homerealm' and 'utvalentine'. A blue callout box with the number '1' points to the 'Custom Value' cell. Below the table is a large empty text area. At the bottom right, a blue callout box with the number '2' points to the 'Next' button. At the bottom center are three buttons: 'Cancel', 'Back', and 'Next'.

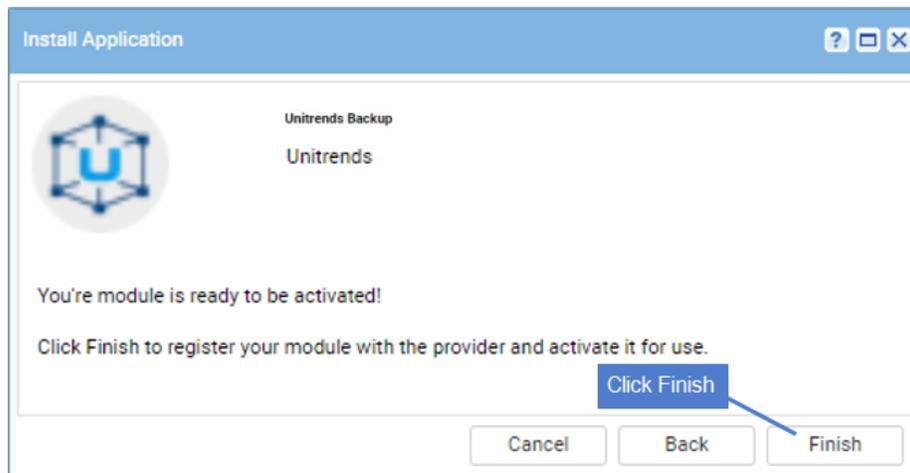
Custom Field	Custom Value
homerealm	utvalentine

- Click **Next**.

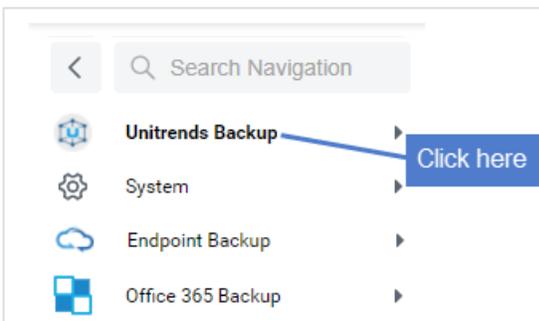


The screenshot shows the 'Install Application' dialog box at a later stage. The 'Instructions' section is empty. Below it is a section titled 'ServiceDesk Definitions to be installed' with the text 'There are no Service Desk Definition to be installed'. Below that is a section titled 'Alert Definitions to be installed' with the text 'Generic system level alert'. A blue callout box with the text 'Click Next' points to the 'Next' button at the bottom right. The 'Cancel', 'Back', and 'Next' buttons are visible at the bottom.

- Click **Finish**. The module is installed and activated.



- 6 Your module is ready for use. To access the module, select **Unitrends Backup**.



## Accessing Unitrends Endpoint Backup

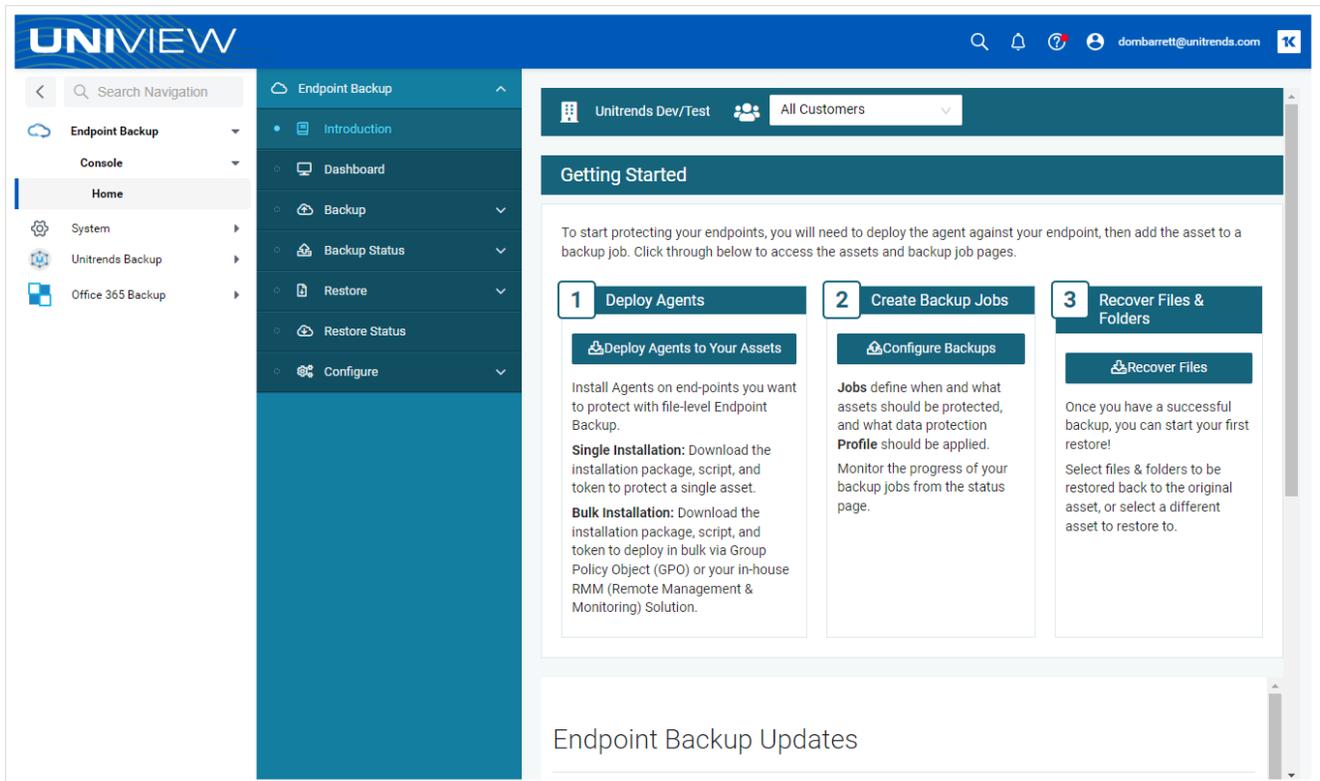
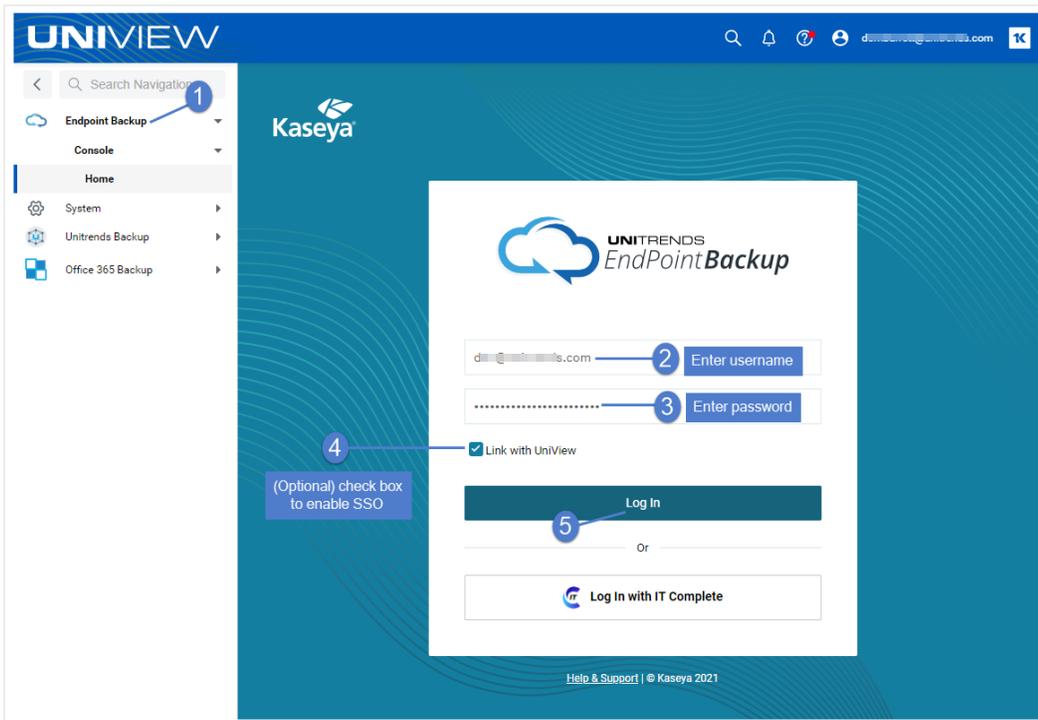
To access Unitrends Endpoint Backup:

- 1 Click **Endpoint Backup**.
- 2 Enter your Endpoint Backup username and password.
- 3 (Optional) Check the **Link with UniView** box to enable single-sign on (SSO).

Upon logging in, your UniView account is linked to your Endpoint Backup account and you no longer need to supply separate credentials to access the Endpoint Backup module.

- 4 Click **Log In**.

For details on using Unitrends Endpoint Backup, see the [Unitrends Endpoint Backup Guide](#).



# Accessing the Unitrends Backup Portal

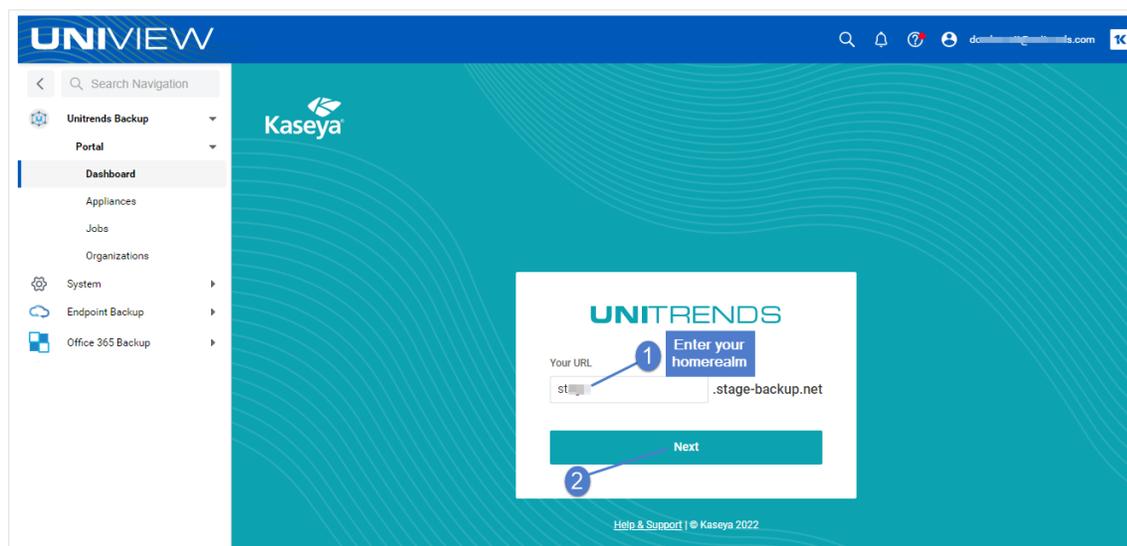
Use the procedure below to access the Unitrends Backup Portal. For details on using the Unitrends Backup Portal, see the [Unitrends Portal Guide](#).

## To log in to the Unitrends Backup Portal for the first time

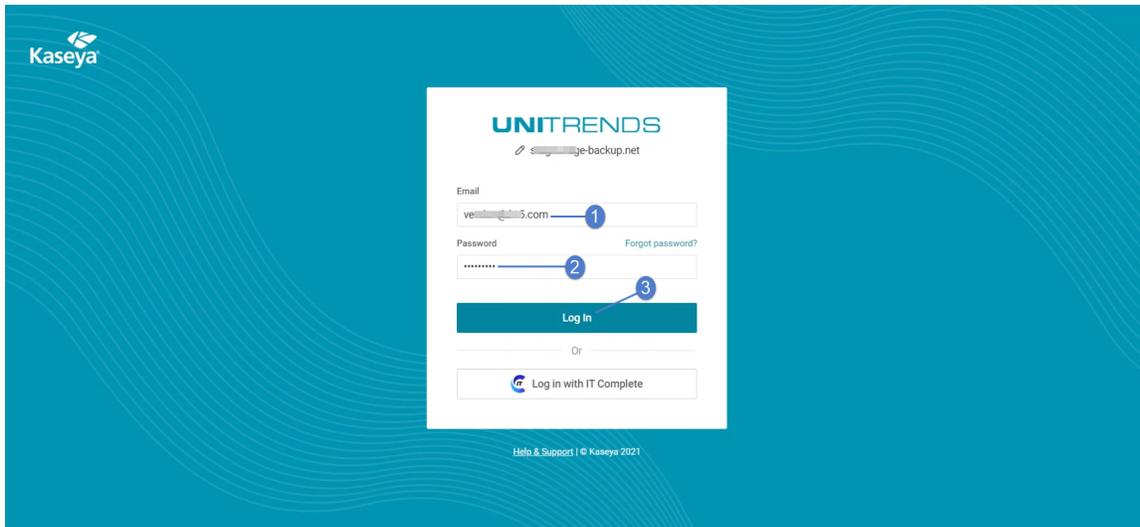
### Notes:

- The Unitrends Backup Portal requires two-factor authentication (2FA) using a supported TOTP authenticator application, such as [Passly Authenticator](#). If you are not already using a supported authenticator application, you will need to download and install one to your iOS or Android device before you can log in to Unitrends Backup Portal.
- This procedure includes steps to pair Unitrends Backup Portal with your authenticator application and to change your password. These steps are required the first time you log in only.

- 1 Click **Unitrends Backup** and enter the backup.net homerealm that was provided to you by the Unitrends Backup Portal Onboarding team. Click **Next**.



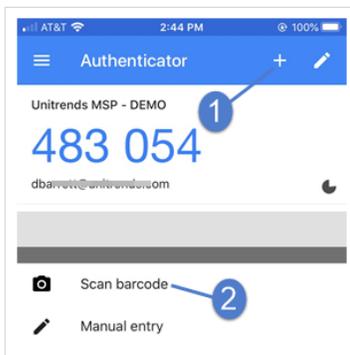
- 2 Enter the username and password of your Unitrends Backup Portal account. Click **Login**.



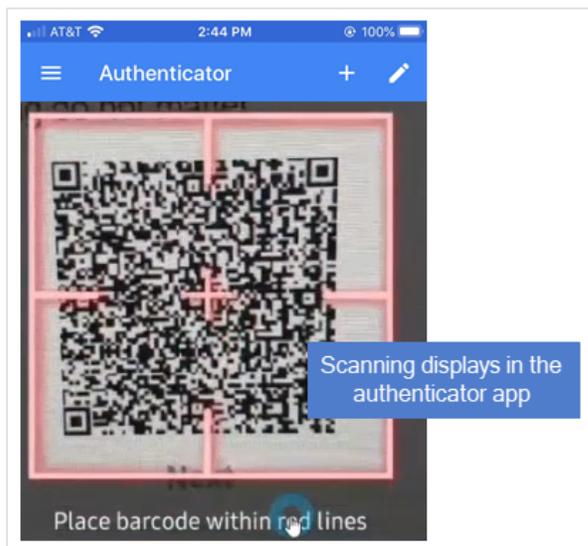
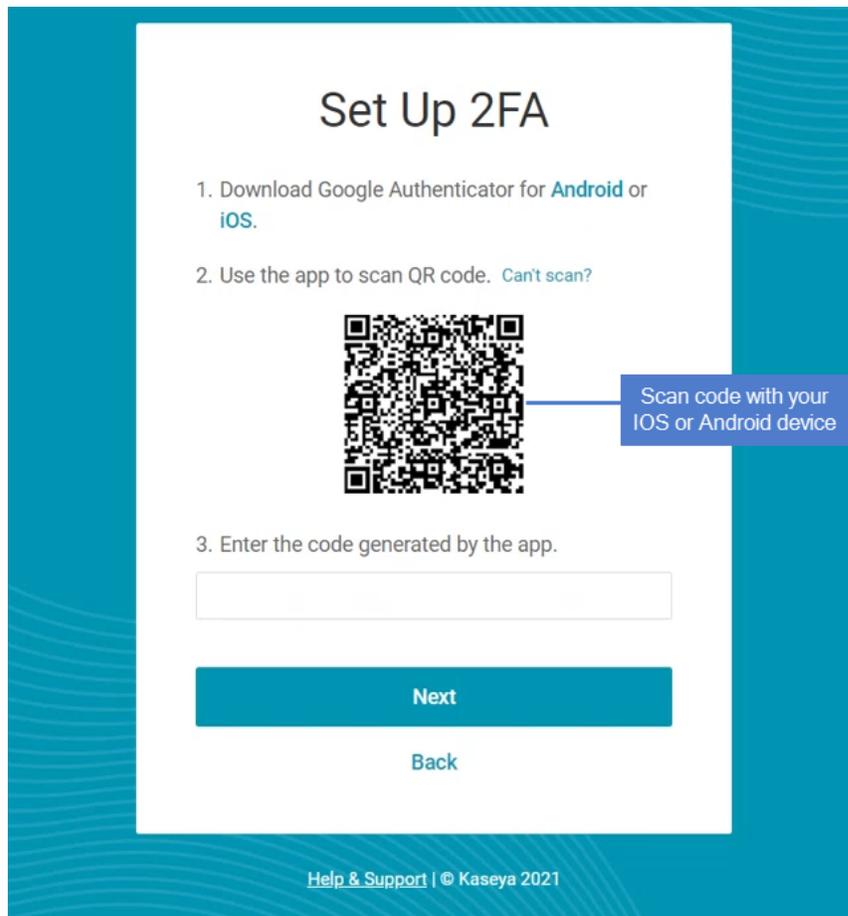
- 3 Download and install a supported TOTP authenticator application to your iOS or Android device. (Skip this step if you have already installed a supported authenticator application.)
- 4 Pair Unitrends Backup Portal to your authenticator application by scanning the barcode or manually entering the QR code. Examples of both methods are given below.

#### Scan barcode:

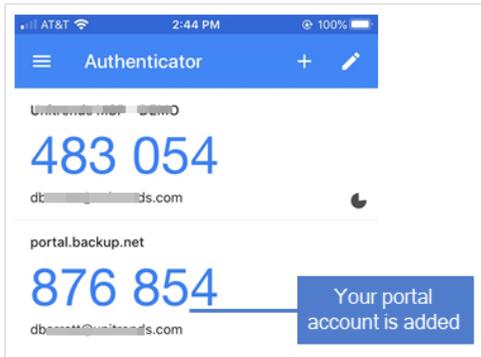
- Open your authenticator application. Select **+**, then select **Scan a barcode**.



- Use your iOS or Android device to scan the QR Code that displays on the Set Up 2FA page.

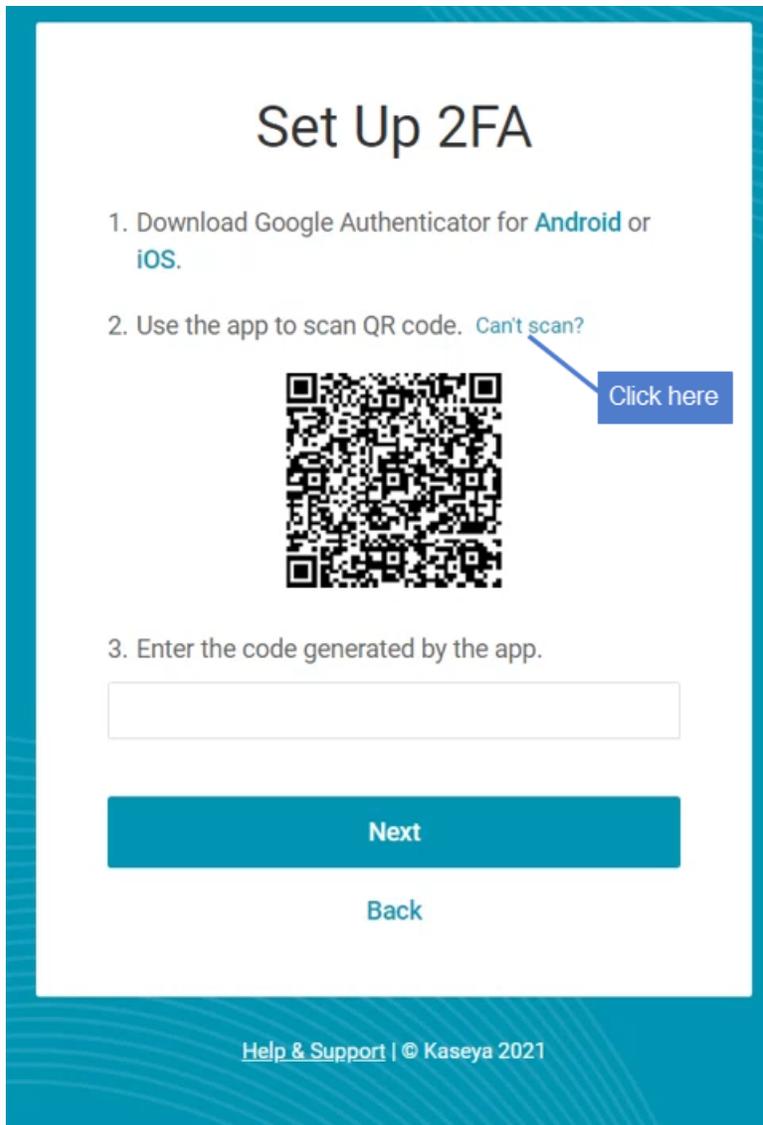


- Your UniView account is added to the authenticator application.

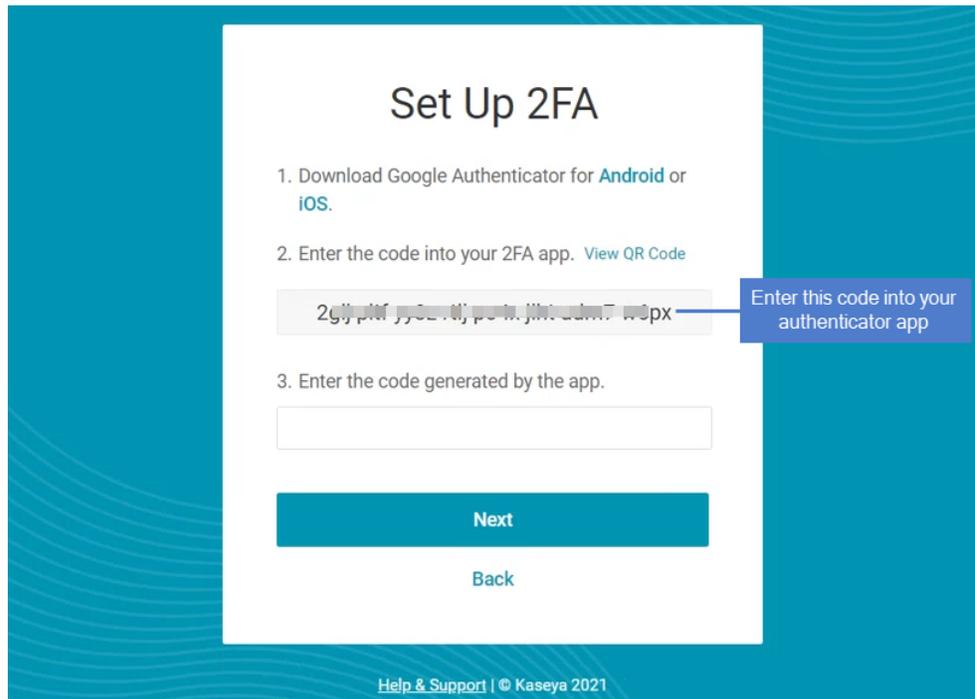


Manually enter QR code:

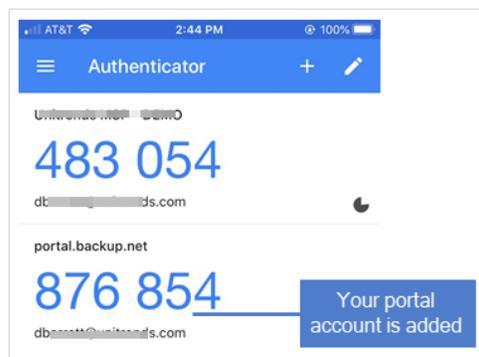
- Click **Can't Scan?**.



- The QR code displays. Enter the QR code into your authenticator app.

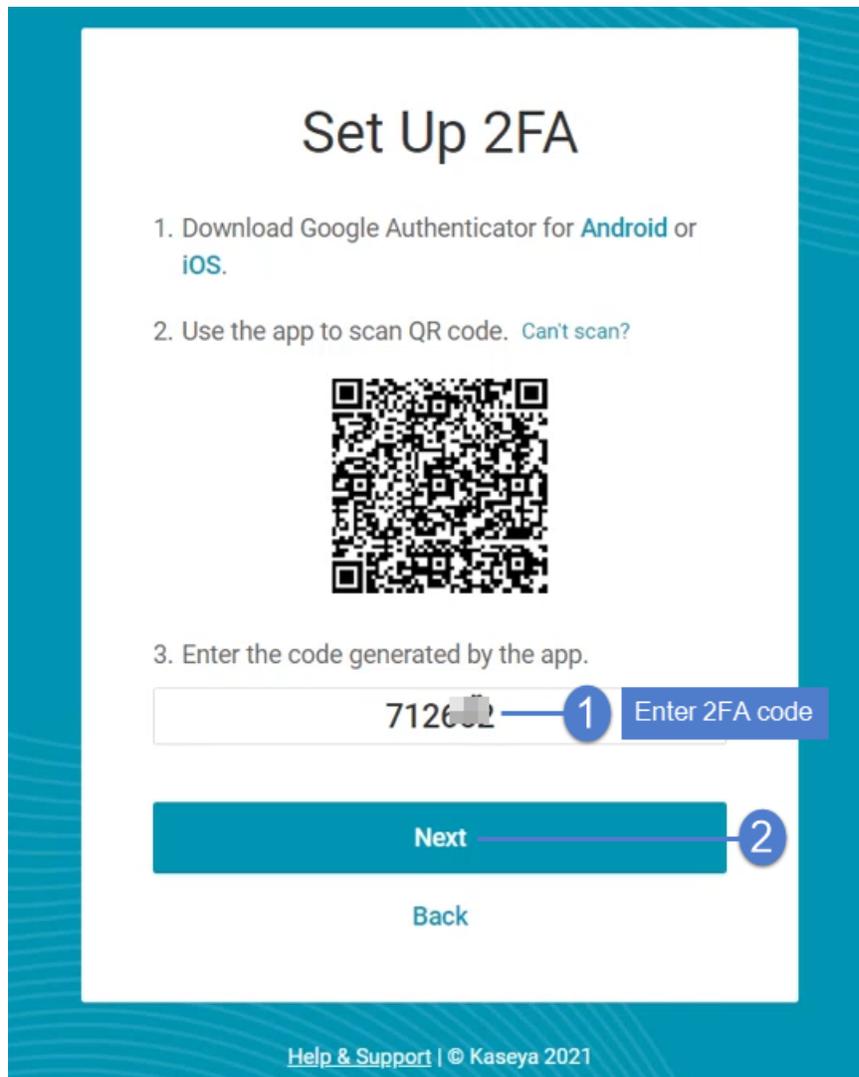


- Your Unitrends Backup Portal account is added to the authenticator application.



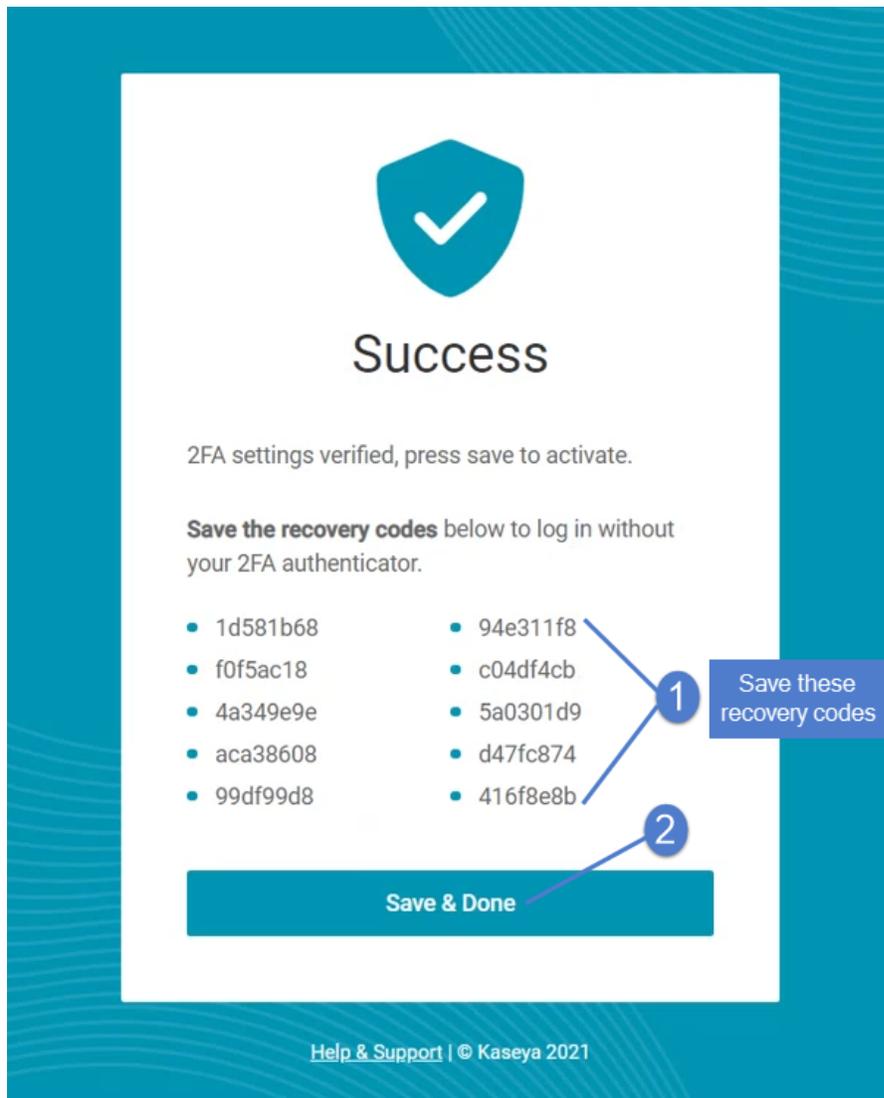
- Return to Unitrends Backup Portal and enter the 2FA code supplied by the authenticator application. Click **Next**.

**Note:** You must enter the code within the 30-second expiration period. Otherwise, you need to enter the next non-expired code displayed in the authenticator application.



- 2 Save the recovery codes listed below. You can use them to log in without your authenticator app. Click **Save & Done**.

**Note:** You can quickly copy and paste the codes into a text editor, (e.g., Notepad). Each recovery code listed below can be used one time only. Use these codes sparingly.



### 3 Change your password:

- Enter the old password.
- Enter the new password.
- Enter the new password again to confirm.
- Click **Confirm**.

**Change Password**

Create a new password for your account.

Old Password  1 Enter old password

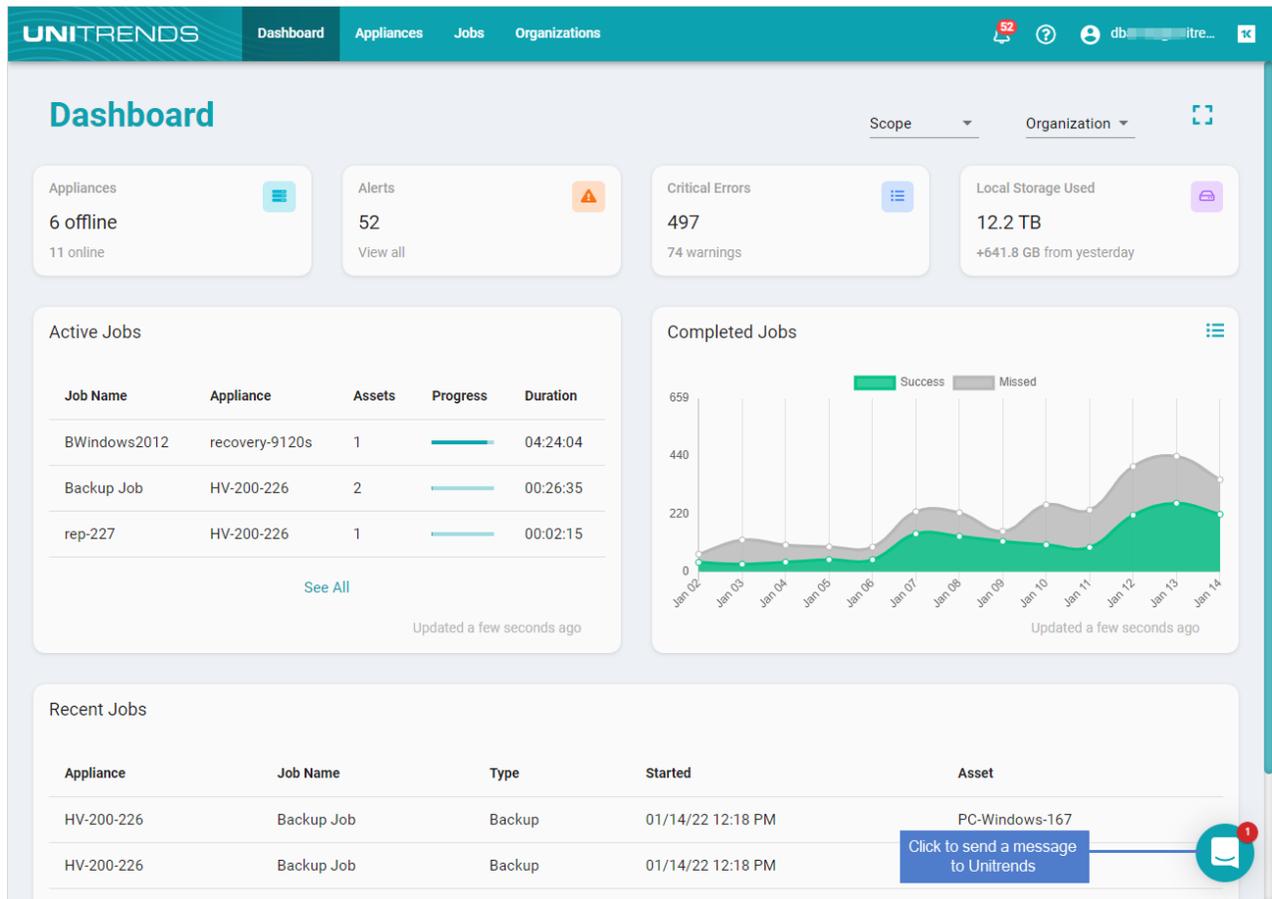
New Password  2 Enter new password

Confirm Password  3 Enter new password again

4

[Help & Support](#) | © Kaseya 2021

- 4 Upon logging in, the portal Dashboard displays.



## Accessing Spanning Office 365 Backup

To access Spanning Backup for Office 365, click **Office 365 Backup** and, if prompted, click **Allow**. For details on using Spanning Office 365 Backup, see the [UniView Office 365 Backup Module Quick Start Administrator Guide](#).

The screenshot displays the UniView web interface. The top navigation bar includes the UniView logo, a search bar, and user profile information. The left sidebar contains a navigation menu with options: Office 365 Backup, Summary, Overview (selected), Customers, System, Endpoint Backup, and Unitrends Backup. The main content area is titled 'Overview' and features a large blue banner for 'UniView Spanning Backup'. Below the banner, a table shows license statistics:

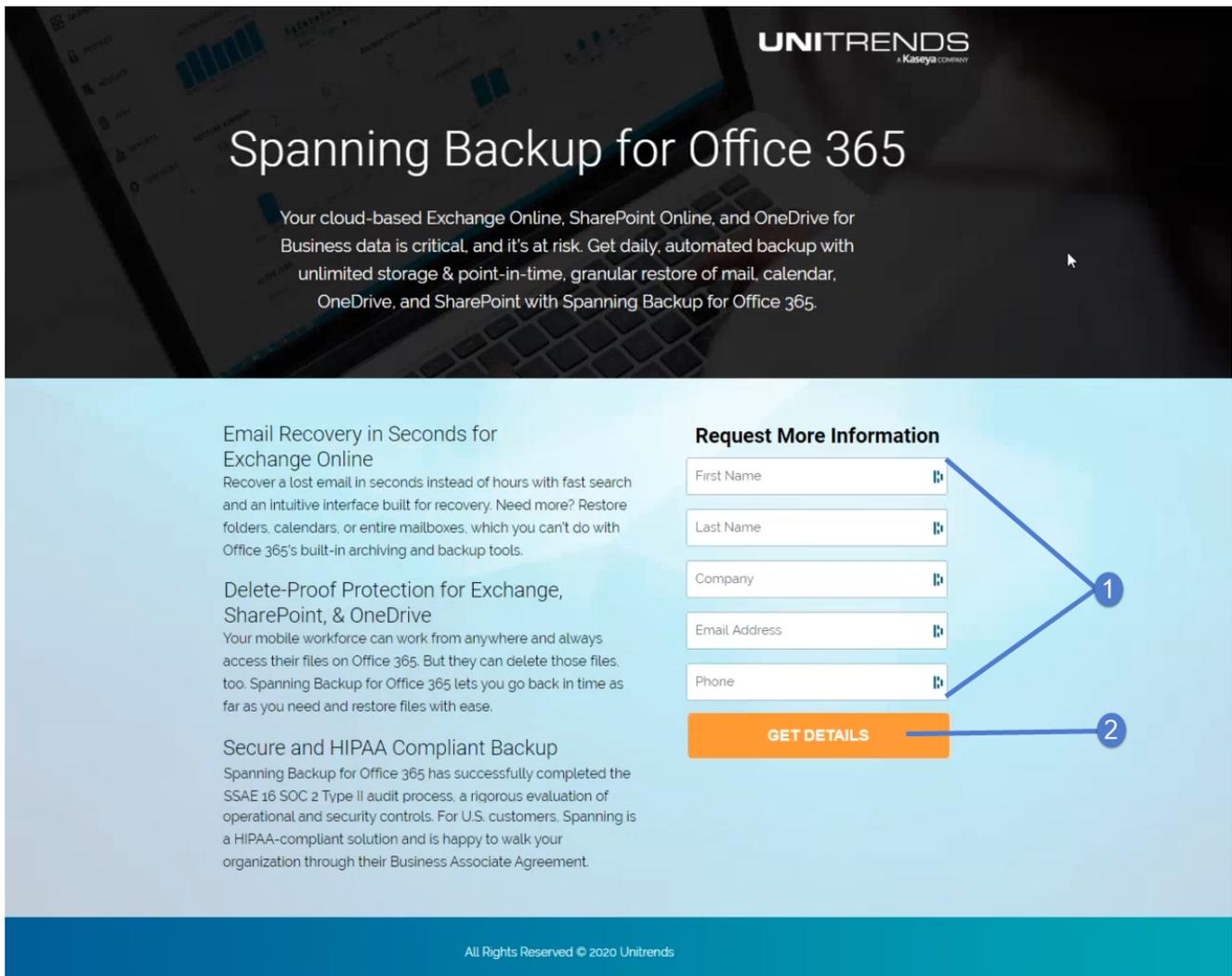
Total Customers	1
Contracted Licenses	100
Allocated Licenses	52
Available Licenses	48

Below the table is a 'GET STARTED →' button. Three informational cards are displayed below the button:

- Quick Start Guide**: Get all the information you need to get Spanning Backup set up for your customers. →
- Learn More**: Spanning Backup ensures that your customer's data is protected, available and recoverable. →
- Manage Your Customers**: Invite new customers to install Spanning Backup and view and manage your existing customers. →

A callout box with the text 'Click for details on adding customers' points to the 'Manage Your Customers' card.

If you have not yet purchased Spanning Backup for Office 365, the following page displays upon clicking **Office 365 Backup**. Enter your contact information and click **Get Details** to get started with Spanning Backup for Office 365.



**UNITRENDS**  
A Kaseya COMPANY

## Spanning Backup for Office 365

Your cloud-based Exchange Online, SharePoint Online, and OneDrive for Business data is critical, and it's at risk. Get daily, automated backup with unlimited storage & point-in-time, granular restore of mail, calendar, OneDrive, and SharePoint with Spanning Backup for Office 365.

**Email Recovery in Seconds for Exchange Online**  
Recover a lost email in seconds instead of hours with fast search and an intuitive interface built for recovery. Need more? Restore folders, calendars, or entire mailboxes, which you can't do with Office 365's built-in archiving and backup tools.

**Delete-Proof Protection for Exchange, SharePoint, & OneDrive**  
Your mobile workforce can work from anywhere and always access their files on Office 365. But they can delete those files, too. Spanning Backup for Office 365 lets you go back in time as far as you need and restore files with ease.

**Secure and HIPAA Compliant Backup**  
Spanning Backup for Office 365 has successfully completed the SSAE 16 SOC 2 Type II audit process, a rigorous evaluation of operational and security controls. For U.S. customers, Spanning is a HIPAA-compliant solution and is happy to walk your organization through their Business Associate Agreement.

**Request More Information**

1

2

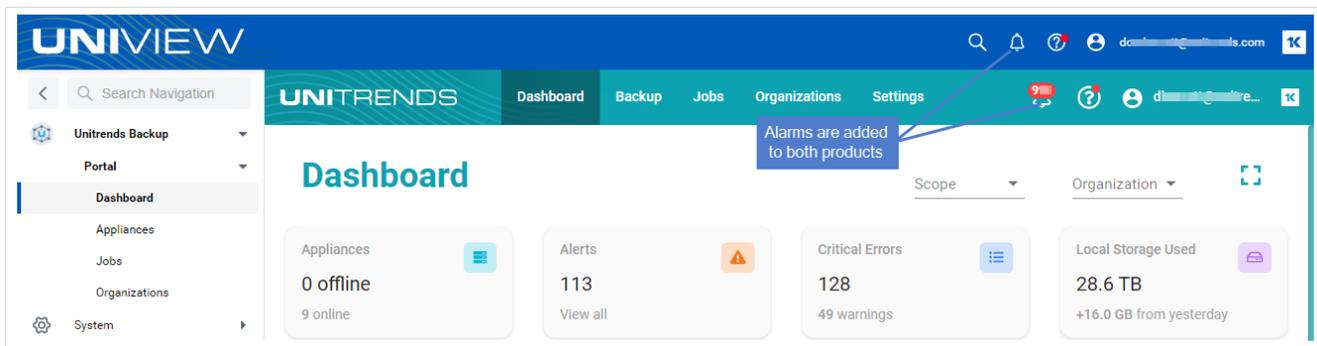
GET DETAILS

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## Working with conditional alarms

Use this feature to set a threshold for how long a machine can go without a good backup or replicated backup (formerly known as *hot backup copy*). If the threshold is exceeded, an alarm is generated and prioritized above all other alerts to help you focus on the most important issues first.

To start using conditional alarms, set up thresholds as described in ["To configure conditional alarms"](#). Once you have configured this feature, alarms are added to BackupIQ in the Unitrends Backup Portal. After configuring conditional alarms in the Unitrends Backup Portal, you can add alarms to UniView as described in ["Displaying conditional alarms in UniView"](#).



## To configure conditional alarms

Use this procedure to set alert thresholds against the last successful backup and last successful replicated backup (formerly known as *hot backup copy*). When a threshold is crossed, an alert is added to BackupIQ, enabling you to quickly prioritize and address alarm conditions:

- You can also send conditional alarms to UniView. After configuring alarms in the Unitrends Backup Portal, continue to "[Displaying conditional alarms in UniView](#)".
- Global Thresholds (required) – Start by setting global thresholds for backups and/or replicated backups. The global threshold settings you configure are applied to assets that are protected by a Unitrends backup schedule and do not have a custom threshold assigned. Global thresholds are applied across all organizations.
- Custom Thresholds (optional) – Create custom thresholds that you can quickly apply to one or more organizations. Custom thresholds take precedence over global thresholds.

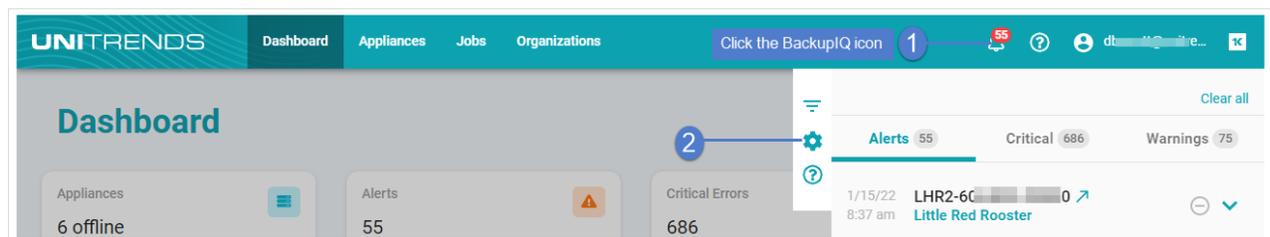
Global and Custom Thresholds enable you to specify the number of days or hours since the last successful backup and last successful replicated backup. A backup alarm is generated if the backup does not complete successfully within X hours or days of the job's scheduled start time. A replication alarm is generated if the successful backup is not replicated within X hours or days of the backup job's end time.

Use these steps to configure conditional alarms:

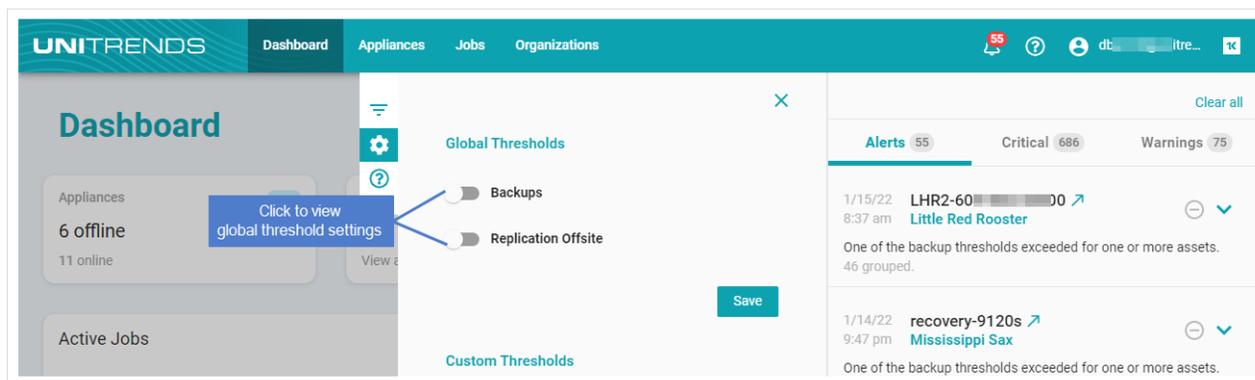
- 1 In UniView, log in to the Unitrends Backup module with a superuser account.

**Note:** You must be logged in to Unitrends Backup Portal as a superuser to create or modify conditional alarms.

- 2 Click the BackupIQ icon in the upper-right corner.
- 3 Click the  icon.

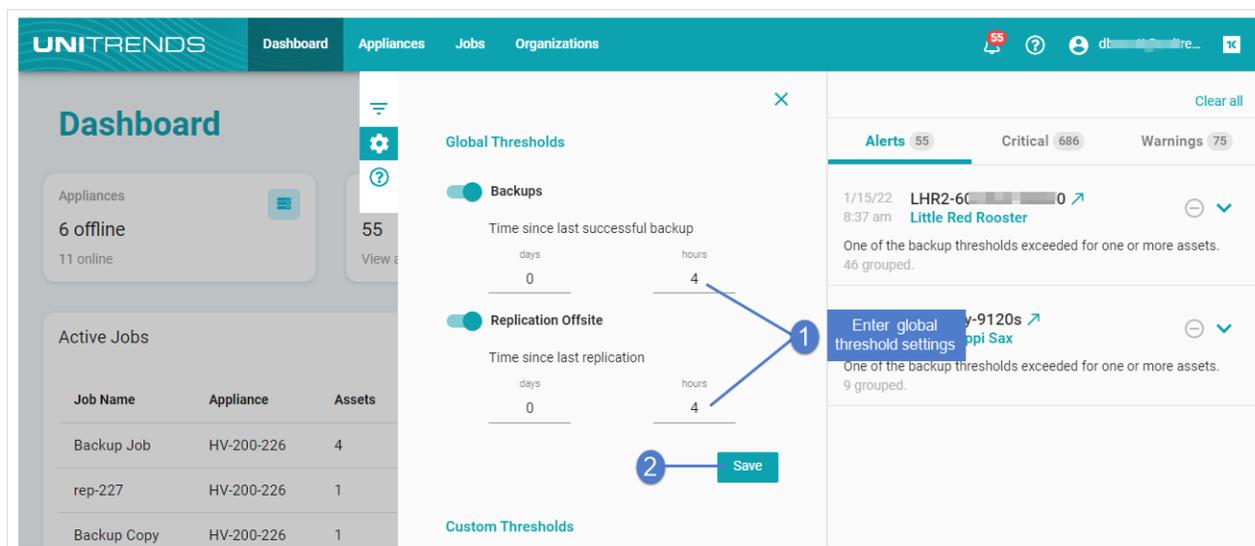


- 4 Click  to view global threshold settings for backups and offsite replications.



- 5 (Required) Enter global threshold settings and click **Save**.

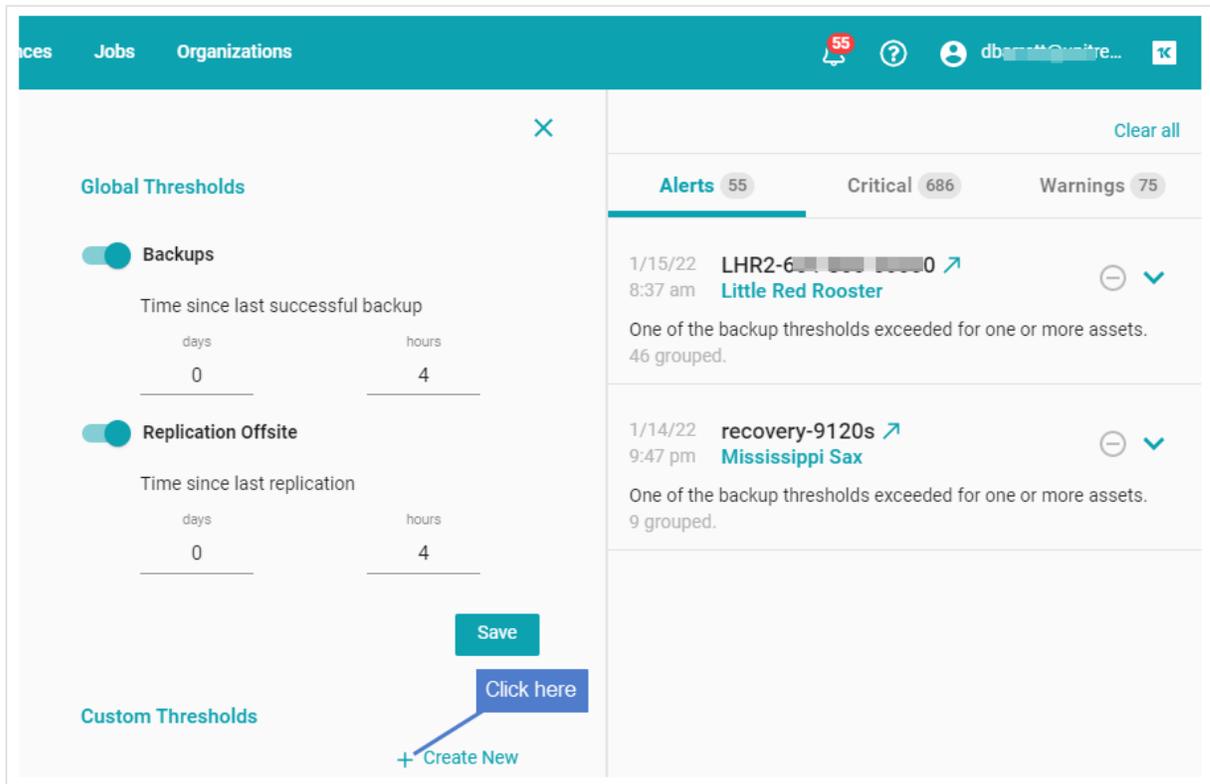
In this 4-hour example, a backup alarm is generated if the backup does not complete successfully within 4 hours of the job's scheduled start time. A replication alarm is generated if the successful backup is not replicated within 4 hours of the backup job's end time.



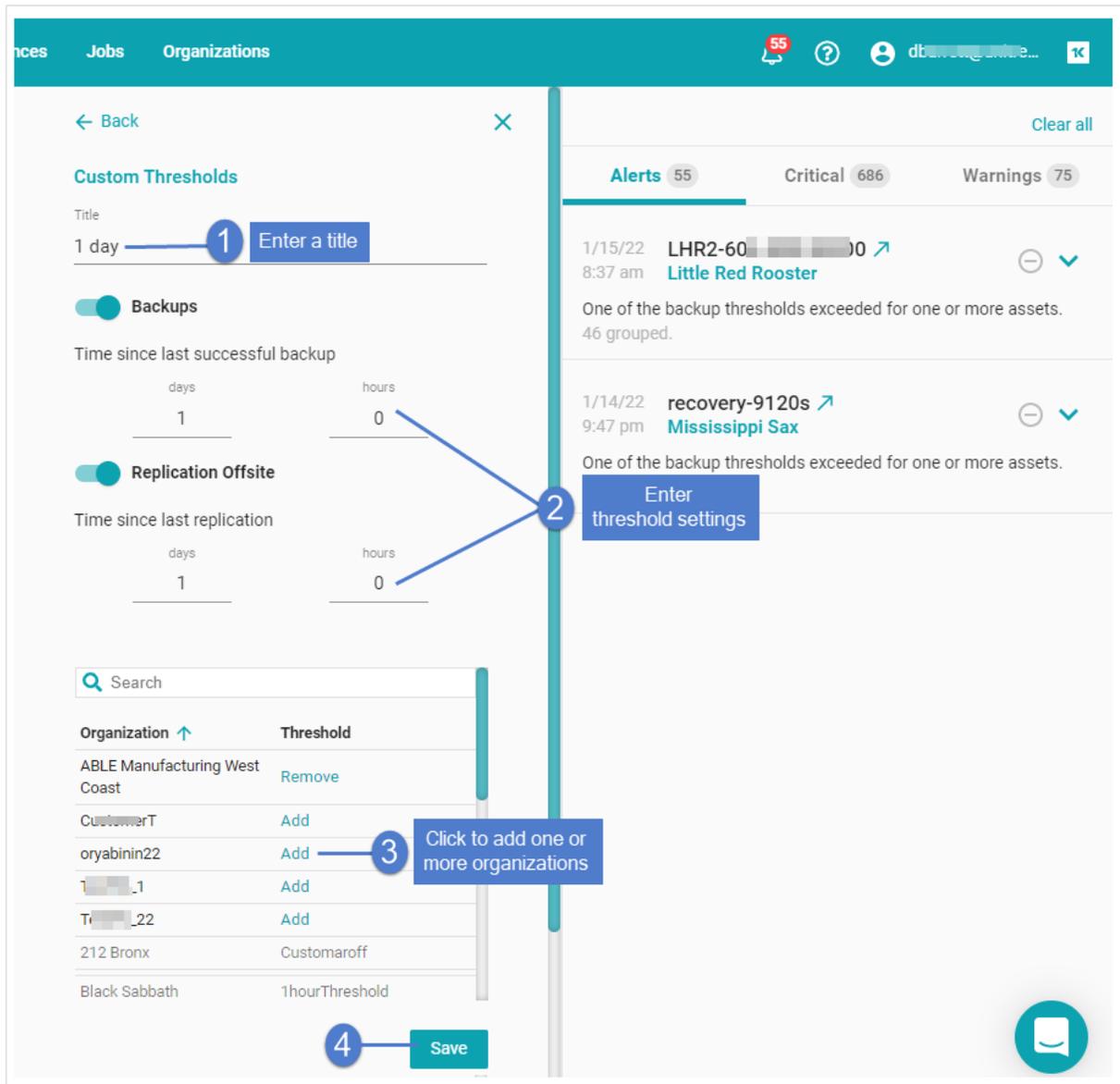
- 6 (Optional) Add a custom threshold and apply to organizations:

**Note:** Each organization can be assigned one custom threshold.

- Click **Create New**:



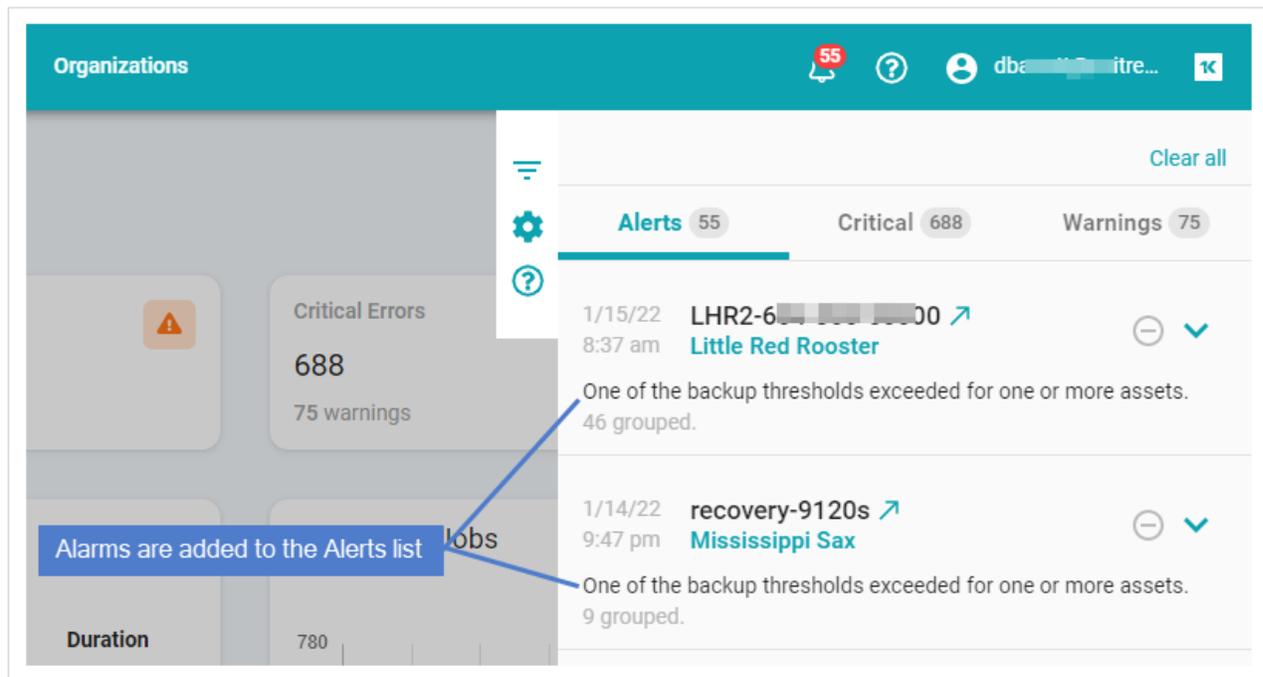
- Enter a title and threshold settings. Click **Save**:



- The custom threshold is added:

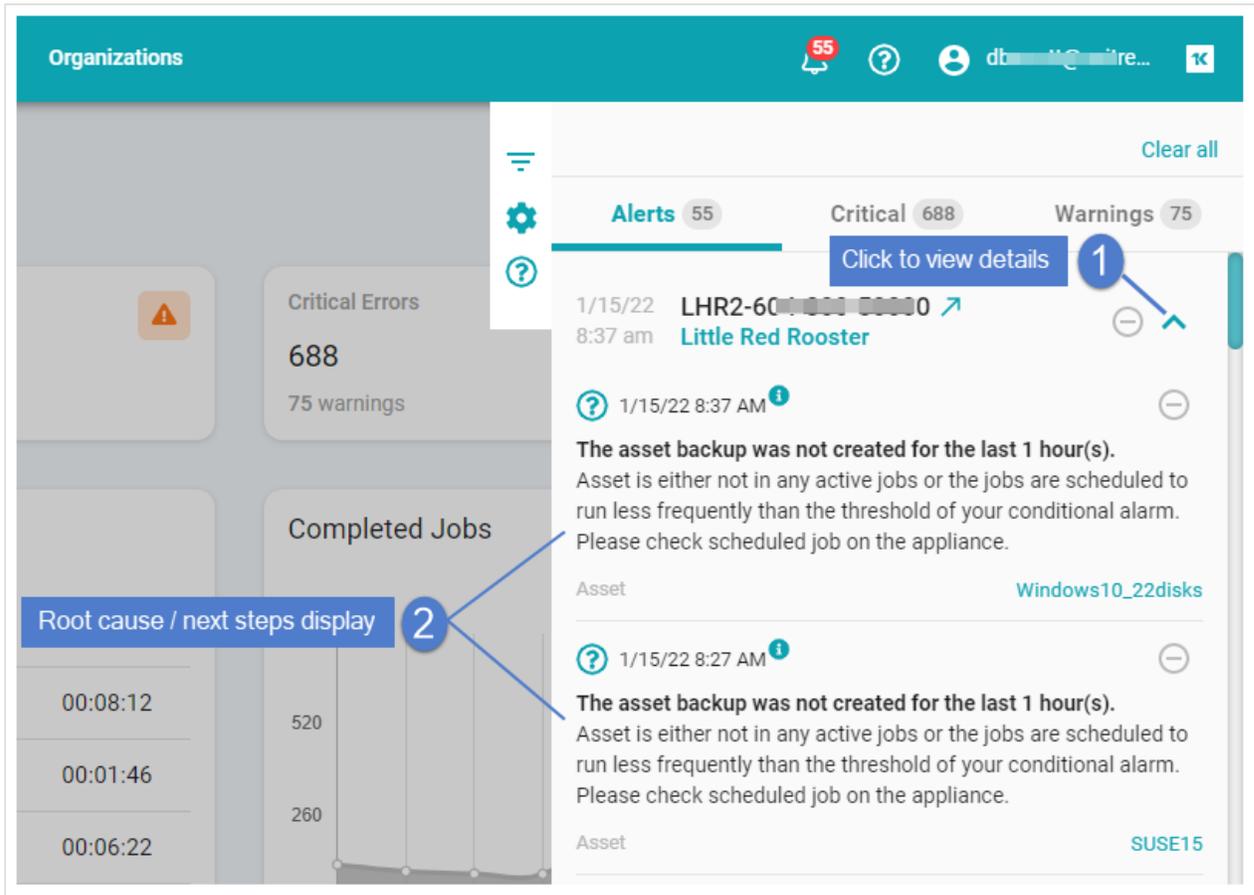
The screenshot displays the BackupIQ interface. On the left, the 'Global Thresholds' section is active, showing settings for 'Backups' and 'Replication Offsite'. Both are set to '0' days and '4' hours. A 'Save' button is visible. Below this is the 'Custom Thresholds' section with a '+ Create New' button. A tooltip indicates '1 day' for '1 Organizations' and 'Custom threshold is added'. On the right, the 'Alerts' list shows two entries: one from 1/15/22 at 8:37 am for 'Little Red Rooster' and another from 1/14/22 at 9:47 pm for 'Mississippi Sax'. Both alerts state 'One of the backup thresholds exceeded for one or more assets. 46 grouped.' and '9 grouped.' respectively. The top navigation bar includes 'Alerts 55', 'Critical 686', and 'Warnings 75'.

When alarms are generated, they are added to the Alerts list in BackupIQ, as shown here:



View alarm details to determine root cause and next steps. These conditions are checked: appliance status, last successful backup, backup job schedule, last successful replication, and replication schedule. If there is an issue, an alert is generated.

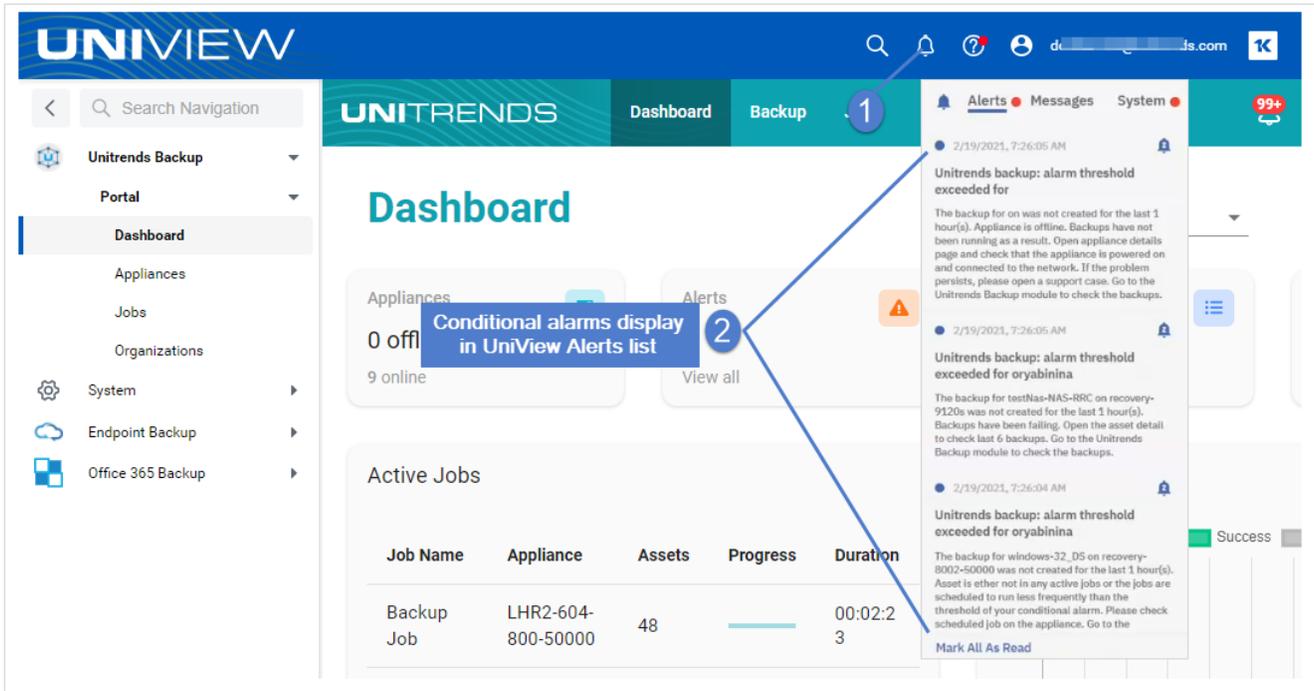
Alarm details in BackupIQ Alerts list:



7 To add alarms to UniView, proceed to "Displaying conditional alarms in UniView".

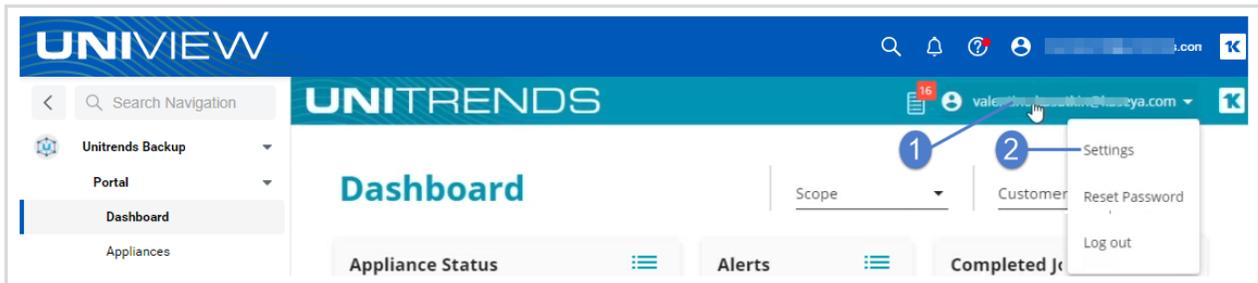
### Displaying conditional alarms in UniView

Conditional alarms can be configured to display as system alerts in UniView:



**To add conditional alarms to UniView**

- 1 Ensure that conditional alarms have been configured in the Unitrends Backup Portal (as described in "To configure conditional alarms").
- 2 Access the Unitrends Backup module.
- 3 Click your Unitrends Backup username and select **Settings**.



- 4 Select the **Integrations** view.
- 5 Locate the VSA integration and click **Show Configuration**.
- 6 Click the  toggles to enable alerts for backups and backup copies.

The screenshot displays the 'Settings' page in UniView, with the 'Integrations' tab selected. Under 'Manage Integrations', the 'VSA' integration by Kaseya is shown as 'Enabled'. A message states: 'Kaseya VSA integration is complete. You can now view your Kaseya agents under Appliances > Agents. Click on Show Configuration to setup conditional alarms synchronization. The portal is integrated with https://uni-view.kaseya.net'. A 'Click here' button points to a 'SHOW CONFIGURATION' link. Below this, the 'VSA Integration Settings' section contains three toggle switches: 'Alerts' (checked), 'Backups' (unchecked), and 'Replication Offsite' (unchecked). Callout boxes indicate that clicking the 'Alerts' and 'Backups' toggles will enable alerts for backups and offsite replications, respectively. A note at the bottom states: 'Backup Alarms will be connected to your VSA Alerts (Default). Edit to also trigger VSA Email.'

7 As new conditional alarms are generated, they will display as system alerts in UniView.