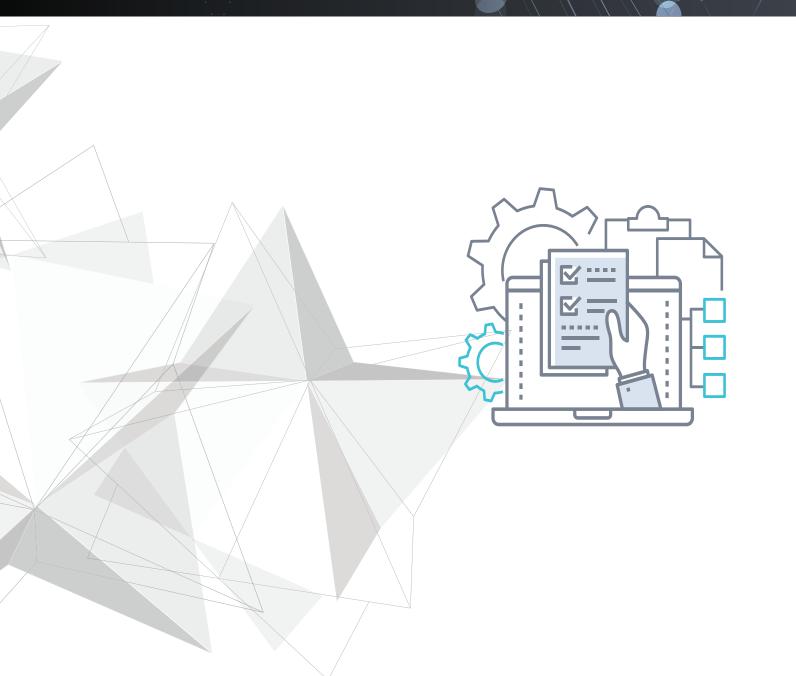
### UNITRENDS



Release 2.50 | Document Version 1.04042024



# Copyright

Copyright © 2024 Unitrends Incorporated. All rights reserved.

Content in this publication is copyright material and may not be copied or duplicated in any form without prior written permission from Unitrends, Inc ("Unitrends"). This information is subject to change without notice and does not represent a commitment on the part of Unitrends.

The software described in this publication is furnished under a license agreement or nondisclosure agreement. The software may be used or copied only in accordance with the terms of the license agreement. See the End User License Agreement before using the software.

The software described contains certain open source components that are copyrighted. For open source licenses, see the UnitrendsOpen Source Compliance section of the product Administrator Guide.

Because of the nature of this material, numerous hardware and software products are mentioned by name. In most, if not all, cases these product names are claimed as trademarks by the companies that manufacture the products. It is not our intent to claim these names or trademarks as our own.

The following applies to U.S. Government End Users: The Software and Documentation are "Commercial Items," as that term is defined at 48 C.F.R.2.101, consisting of "Commercial Computer Software" and "Commercial Computer Software Documentation," as such terms are used in 48 C.F.R.12.212 or 48 C.F.R.227.7202, as applicable. Consistent with 48 C.F.R.12.212 or 48 C.F.R.227.7202-1 through 227.7202-4, as applicable, the Commercial Computer Software and Commercial Computer Software Documentation are being licensed to U.S. Government end users (a) only as Commercial Items and (b) with only those rights as are granted to all other end users pursuant to the terms and conditions herein. Unpublished-rights reserved under the copyright laws of the United States. Unitrends agrees to comply with all applicable equal opportunity laws including, if appropriate, the provisions of Executive Order 11246, as amended, Section 402 of the Vietnam Era Veterans Readjustment Assistance Act of 1974 (38 USC 4212), and Section 503 of the Rehabilitation Act of 1973, as amended, and the regulations at 41 CFR Parts 60-1 through 60-60, 60-250, and 60-741. The affirmative action clause and regulations contained in the preceding sentence shall be incorporated by reference.

The following applies to all contracts and subcontracts governed by the Rights in Technical Data and Computer Software Clause of the United States Department of Defense Federal Acquisition Regulations Supplement:

RESTRICTED RIGHTS LEGEND: USE, DUPLICATION OR DISCLOSURE BY THE UNITED STATES GOVERNMENT IS SUBJECT TO RESTRICTIONS AS SET FORTH IN SUBDIVISION (C)(1)(II) OF THE RIGHTS AND TECHNICAL DATA AND COMPUTER SOFTWARE CLAUSE AT DFAR 252-227-7013. UNITRENDS CORPORATION IS THE CONTRACTOR AND IS LOCATED AT 200 WHEELER ROAD, NORTH TOWER, 2ND FLOOR, BURLINGTON, MASSACHUSETTS 01803.

Unitrends, Inc 200 Wheeler Road North Tower, 2nd Floor Burlington, MA 01803, USA Phone: 1.866.359.5411



## Contents

Getting Started	
Next steps	
Accessing the UniView Portal	8
Additional resources	
Switching to Dark Theme view	
Working with the Dashboard	
Filtering the Dashboard	
Appliances tile	
Alerts tile	
Low Space Appliances tile	
Local Storage Used tile	
Active Jobs tile	
Completed Jobs tile	
Recent Jobs tile	
Working with Alerts and Conditional Alarms	
Working with Alerts and Conditional Alarms	
Working with Alerts and Conditional Alarms	39 39
Working with Alerts and Conditional Alarms Alerts Alert conditions	
Working with Alerts and Conditional Alarms         Alerts         Alert conditions         Alerts and PSA ticketing	
Working with Alerts and Conditional Alarms         Alerts         Alert conditions         Alerts and PSA ticketing         Email alerts	
Working with Alerts and Conditional Alarms         Alerts         Alert conditions         Alerts and PSA ticketing         Email alerts         Alerts for Spanning Microsoft 365 backup	
Working with Alerts and Conditional Alarms         Alerts         Alert conditions         Alerts and PSA ticketing         Email alerts         Alerts for Spanning Microsoft 365 backup         Alerts for Spanning Google Workspace backup	
Working with Alerts and Conditional Alarms         Alerts         Alert conditions         Alerts and PSA ticketing         Email alerts         Alerts for Spanning Microsoft 365 backup         Alerts for Spanning Google Workspace backup         Alerts for Spanning Salesforce backup	
Working with Alerts and Conditional Alarms         Alerts         Alert conditions         Alerts and PSA ticketing         Email alerts         Alerts for Spanning Microsoft 365 backup         Alerts for Spanning Google Workspace backup         Alerts for Spanning Salesforce backup         Alerts for Datto Backup for Microsoft Azure (DBMA)	
Working with Alerts and Conditional Alarms         Alerts         Alert conditions         Alerts and PSA ticketing         Email alerts         Alerts for Spanning Microsoft 365 backup         Alerts for Spanning Google Workspace backup         Alerts for Spanning Salesforce backup         Alerts for Datto Backup for Microsoft Azure (DBMA)         Managing alerts	
Working with Alerts and Conditional Alarms         Alerts         Alert conditions         Alerts and PSA ticketing         Email alerts         Alerts for Spanning Microsoft 365 backup         Alerts for Spanning Google Workspace backup         Alerts for Spanning Salesforce backup         Alerts for Datto Backup for Microsoft Azure (DBMA)         Managing alerts         Conditional alarms	



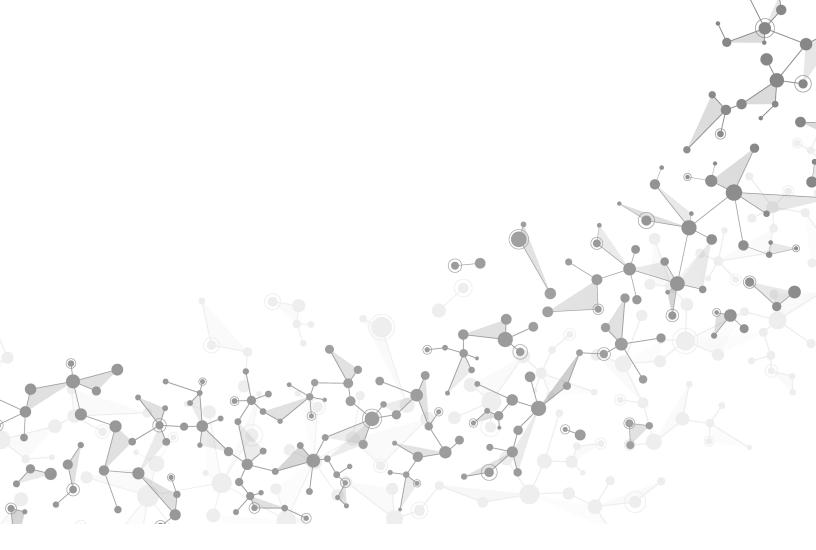
Adding assets to an appliance	
Removing assets from an appliance	
Viewing assets	
Removing assets	
Working with backup policies	
Working with VSA 9 Agents	
Working with Spanning Backup	
Working with Microsoft 365	
Working with Google Workspace	
Working with Salesforce	
Working with Datto Backup for Microsoft Azure	
Working with Jobs	
Working with recent jobs	
Viewing active jobs	
Working with scheduled jobs	
Working with Organizations	
Working with Users and Scopes	
Working with users	
Working with scopes	
Working with Integrations	
Integrating VSA 9	
Integrating VSA 10	
Integrating KaseyaOne	
Working with your KaseyaOne integration	
Integrating Autotask	
Working with your Autotask Integration	
Integrating ConnectWise Manage	
Working with your ConnectWise Manage integration	
Integrating Kaseya's Billing Management System (BMS) or Vorex	
Working with your BMS or Vorex integration	



AP	I Access	321
٧	Working with your IT Glue integration	318
I	ntegrating IT Glue	313
١	Working with your Datto Portal integration	309
I	ntegrating Datto Portal	306
I	mporting Accounts or Companies from your PSA	302



This page is intentionally left blank.





# **Getting Started**

The UniView Portal is a SaaS-based management platform that provides UI and API integration across Unitrends bestof-breed approaches to backup and recovery: Unitrends backup appliances, Datto Backup for Microsoft Azure, and Spanning SaaS Backup for Microsoft 365, Google Workspace, and Salesforce.

UniView is the centralized management hub for Unitrends Unified Backup. Leverage UniView for time-saving automation, workflow integrations, and streamlined management of your backup and recovery environments.

With UniView, you have one screen to manage these environments in minutes per day, regardless of where your data lives.

UniView is modular in design – simply start with what you need and easily snap in additional modules as needed.

### Next steps

To get started, log in to the UniView Portal (see "Accessing the UniView Portal") and add your Unitrends Unified Backup products:

- Add each Unitrends appliance as described in "Adding an appliance".
- Add your Spanning Backup products as described in "Integrating a Microsoft 365 tenant", "Integrating a Google Workspace domain", and "Integrating a Salesforce organization".
- Add Datto Backup for Microsoft Azure as described in "Integrating Datto Portal".

Next, quickly monitor and manage your backup products from the UniView Portal:

- For Unitrends appliances, check out the Dashboard to view the status of all appliances at a glance (see "Working with the Dashboard"). To explore more features, see "Working with Unitrends Appliances, Assets, and Backups" and "Working with Jobs".
- For Spanning Backup, use the Protect page to manage your backups and licenses. For details, see "Working with Spanning Backup".
- For Datto Backup for Microsoft Azure, use the Protect page to view summary and status information about your protected assets. For details, see "Working with Datto Backup for Microsoft Azure".
- View BackuplQ alerts to quickly address issues. Set up conditional alarms and email notifications for more robust alerting. For details, see "Working with Alerts and Conditional Alarms".

Add more integrations to leverage other product features (see "Working with Integrations"). For example:

- Integrate KaseyaOne to enable users to log in to the UniView Portal with their KaseyaOne credentials.
- Integrate your PSA system (ConnectWise Manage, Autotask, BMS, or Vorex) to automatically create a ticket in the PSA for each BackupIQ alert.
- Add the Unitrends Backup module to your VSA so you can access the UniView Portal from the VSA UI. For details, see "Integrating VSA 10" or "Integrating VSA 9".
- Integrate IT Glue to synchronize your assets and appliances with Kaseya's IT Glue documentation platform.



### Accessing the UniView Portal

Steps required to log in vary by whether you log in with KaseyaOne or by using UniView Portal credentials. These considerations apply:

- In some environments, log in with KaseyaOne is required. In this case, if you attempt to log in by using UniView Portal credentials, you are redirected to the KaseyaOne Login page. Log in as described in "To log in with KaseyaOne credentials".
  - Note: This login procedure requires a KaseyaOne account. If you do not have a KaseyaOne account, request one from Support and set it up as described in this KaseyaOne article: <u>Set up your KaseyaOne user</u> <u>account</u>.
- In some environments, log in with KaseyaOne is optional. You can click **Log in with KaseyaOne** or enter your UniView Portal credentials:

	/IEW	
Ø € g	je-backup.net	
Email	_	
dt inds.com		
Password	Forgot password?	
•••••	۲	
Log	in 🔪	
0	r	Opt to log in with UniView credentials or KaseyaOr
Ҟ Log in wit	th KaseyaOne	
	out KaseyaOne	

 In some environments, log in with KaseyaOne is not enabled. In this case, the Login page does not contain the Log in with KaseyaOne button and you must log in by using UniView Portal credentials. For details, see "To activate your UniView Portal account and log in for the first time" or "To log in using UniView Portal credentials".

Use these procedures to access and exit the UniView Portal:

- "To activate your UniView Portal account and log in for the first time"
- "To log in using UniView Portal credentials"
- "To log in with KaseyaOne credentials"
- "To remove an older KaseyaOne/UniView mapping that was created with mismatched user names"
- "To log out of the UniView Portal"
- "To reset your UniView Portal password"



### To activate your UniView Portal account and log in for the first time

When your user account is provisioned, you receive a *Welcome to UniView* email containing an activation link. You must run this procedure within 48 hours of receiving this email to activate your UniView Portal account. If your activation link has expired, contact the UniView Portal Onboarding team to obtain a new link.

#### Notes:

- In some environments, log in with KaseyaOne is required. In this case, a UniView account is not needed and you can log in for the first time as described in "To log in with KaseyaOne credentials". If you attempt to log in by using UniView Portal credentials, you are redirected to the KaseyaOne Login page.
- UniView Portal requires two-factor authentication (2FA) using a supported TOTP authenticator application, such as <u>Passly Authenticator</u>. 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 the UniView Portal.
- This procedure includes steps to set your password and to pair the UniView Portal with your authenticator application. These steps are required the first time you log in only.
- 1 Open the *Welcome to UniView* email that you received from no-reply@backup.net and click the **Activate Now** button.

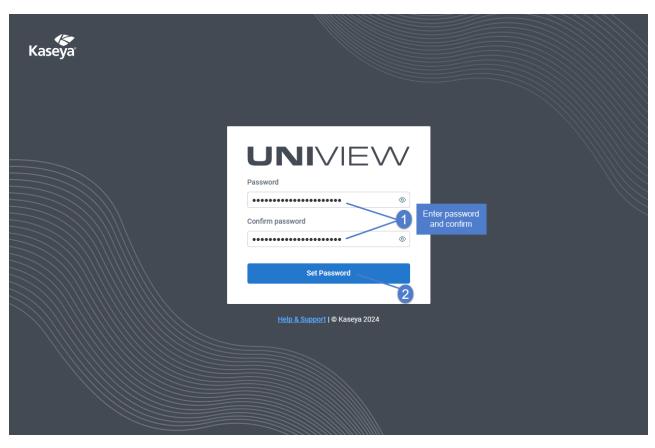


no-reply@backup.net <no-reply@backup.net>     Tue, N       To: No Reply <no-reply@backup.net>     Tue, N</no-reply@backup.net></no-reply@backup.net>	Mar 12, 2024 at 8:31 AM
Welcome to UniView, the backup management portal!	
Hi dbttuniview@gmail.com,	
Welcome to UniView, a free, web-based management console integrating Unitrends, Spanning and Datto backup in one centralized management view.	
With UniView, you get:	
<ul> <li>BackupIQ Intelligent Alerts</li> <li>Multifactor authentication</li> <li>Single Sign-On and reverse proxy management</li> <li>Integrations management (PSA, documentation, ticketing)</li> <li>And more!</li> </ul>	
Simply start with what you're using today and easily add additional modules as you go.	
To help you get started, an account has been created for you.	
For more information read the guide	
Use the following link to activate account:	
Activate Now Click here	
Thank you!	
UNIVIEW	

- 2 Create your UniView password:
  - Enter the password in the Password and Confirm Password fields.
  - Click Set Password.

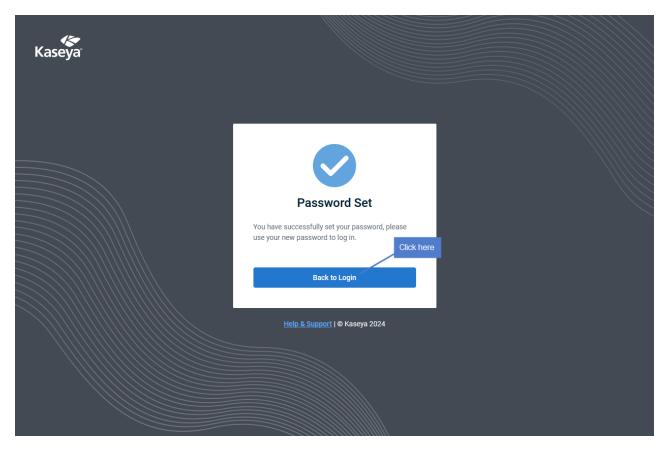
10





3 Click Back to Login.





4 Enter the backup.net homerealm that was provided to you by the UniView Portal Onboarding team. Click **Next**.





- 5 Enter the username and password of your UniView Portal account. Click Log In.
  - **Note:** If you are redirected to the KaseyaOne Login page, log in with KaseyaOne is required in your environment. Do not continue with this procedure. Instead, enter your KaseyaOne credentials (for details see "To log in with KaseyaOne credentials").



Kaseya		
	Email db===tUniView@gmail.com	
	Password Forgot password?	
	Or Con Con Contract C	
	Learn More about KaseyaOne Help <u>&amp; Support</u>   © Kaseya 2024	

- 6 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.)
- 7 Pair UniView Portal to your authenticator application by scanning the barcode or manually entering the QR code. Examples of both methods are given below.

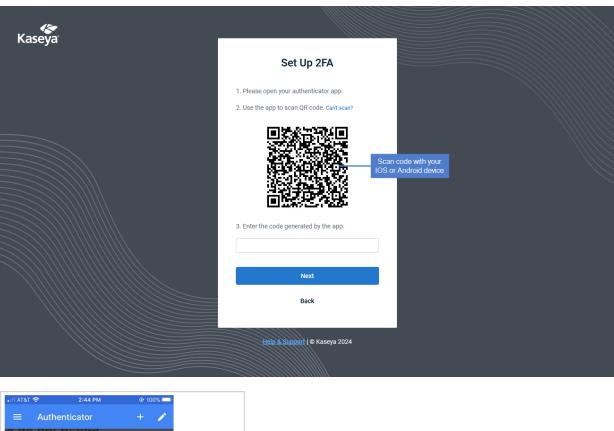
#### Scan barcode:

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

गा। AT&T 🗢	2:44 PM	@ 10	0% 💷
= /	Authenticator	+	1
48	s MSP - DEMO 3 054 министрани		L
		_	
Ō :	Scan barcode2		
/	Manual entry		

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



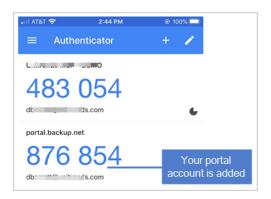




• Your UniView Portal account is added to the authenticator application.

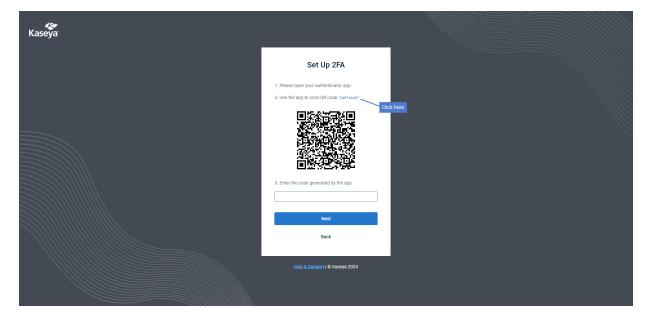


Release 2.50 | April 2024



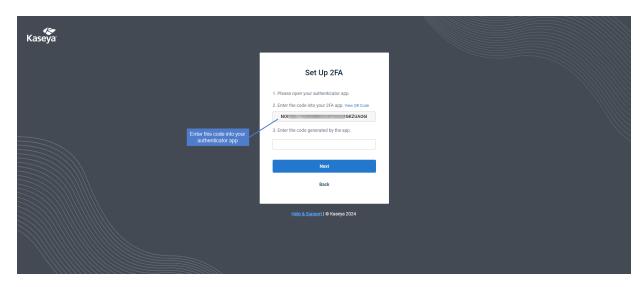
Manually enter QR code:

• Click Can't Scan?.

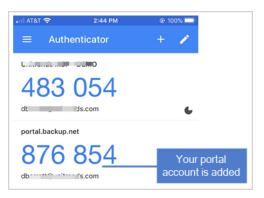


• The QR code displays. Enter the QR code into your authenticator app.



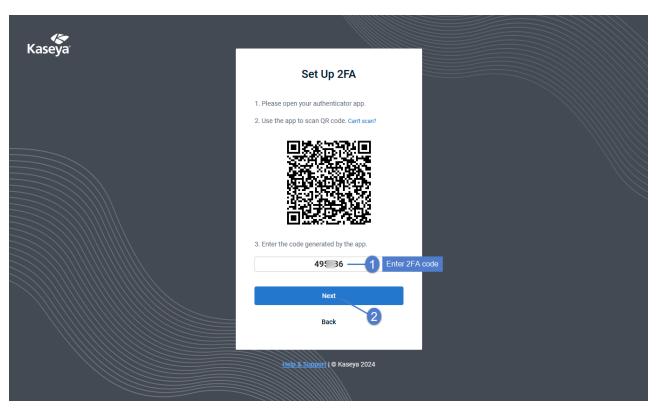


• Your UniView Portal account is added to the authenticator application.



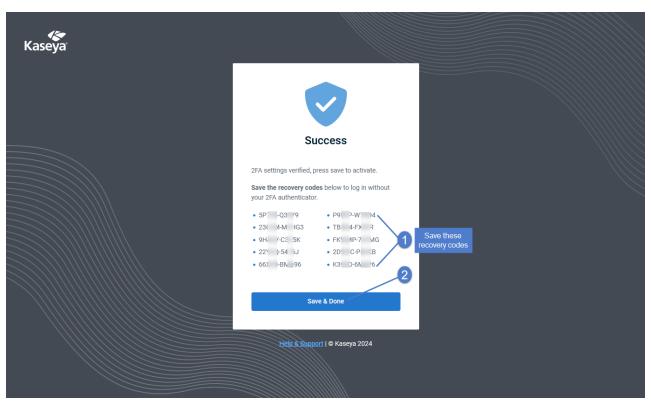
- 8 Return to the UniView Portal and enter the 2FA code supplied by the authenticator application. Click Next.
  - **Note:** You must enter the code within the 30-second expiration period. Otherwise, you need to enter the next non-expired code displayed in the authenticator application.





- 9 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.





**10** You are logged in to the UniView Portal.

UNIVIEW	Dashboard P	rotect Jobs (	Organizations		🔞 📒 🥑 🔷 db 🚬 litre 📧
Dashboard					Scope Organization
B Appliances	3 offline	▲ Alerts	30	S Low Space Appliances	2 E Local Storage Used 72.7 TB
Active Jobs				Completed Jobs	Ċ
Job Name	Appliance	Assets Pr	ogress Duration	705	
Replica Restore	recovery-8120s- 5	3 -	00:07:33	530	
Backup image	recovery-8120s-	2	00:04:15	265	
Backup 139-99 image	recovery-8120s-	1 -	00:00:26	0 Apr 06 Apr 07 Apr 08 Apr 09	Apr 10 Apr 11 Apr 12 Apr 13 Apr 14 Apr 15 Apr 16 Apr 17 Apr 18
	See A	.11		Success Missed	
Recent Jobs					
Appliance	Job	Name	Туре	Started	Asset



#### To log in using UniView Portal credentials

1 Open a Firefox or Chrome browser and enter *https://login.backup.net/* to access the Login page.



2 Enter the backup.net homerealm that was provided to you by the UniView Portal Onboarding team. Click Next.



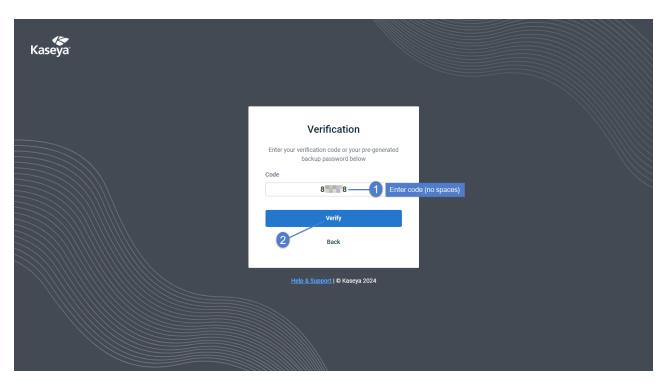
3 Enter the username and password of your UniView Portal account. Click Log In.



Kaseya		
	UNIVIEW	
	Ø e ge-backup.net Email dt ∋nds.com1	
	Password Forgot password?	
	Or Or Cog in with KaseyaOne Learn More about KaseyaOne	
	Help & Support   © Kaseya 2024	

- 4 Enter your two-factor authentication (2FA) code, then click **Verify**. You can obtain the code from your authenticator app or use a recovery code.
  - **Note:** Only use a recovery code if you have lost your IOS or Android device, or cannot access your authenticator application for some other reason.





5 Upon logging in, the portal Dashboard displays.

UNIVIEW	Dashboard Pr	rotect Jobs	Organizations		😥 📜 🧭 🔵 db 🔍 litre 🚦
Dashboard					All V All C
Appliances	3 offline	▲ Alerts	:	0 S Low Space Appliances 2	Local Storage Used 72.7 TB
Active Jobs				Completed Jobs	୯
Job Name	Appliance	Assets	Progress Duration	- 795	
Replica Restore	recovery-8120s- 5	3	00:07:33	530	
Backup image	recovery-8120s-	2	00:04:15	265	
Backup 139-99 image	recovery-8120s-	1	00:00:26	0 Apr 06 Apr 07 Apr 08 Apr 09 Apr 10 Apr 11	Apr 12 Apr 13 Apr 14 Apr 15 Apr 16 Apr 17 Apr 18
	See A	II		Success Missed	
Recent Jobs					
Appliance	Job	Name	Туре	Started Asset	



### To log in with KaseyaOne credentials

<u>KaseyaOne</u> is Kaseya's integrated platform of IT and security management solutions. Use this procedure to log in to the UniView Portal by using your KaseyaOne account credentials.

1 Open a browser and enter *https://login.backup.net/* to access the Login page.



2 Enter the backup.net homerealm that was provided to you by the UniView Portal Onboarding team. Click Next.



3 Enter your email and password. Click Log in with KaseyaOne.

Note: If you do not see the Log in with KaseyaOne button, this feature is not available in your environment.



Kaseya		
	Email dtnds.com	
	Password Forgot password?	
	Or Click here	
	Help & Support   © Kaseya 2024	

- 4 Enter your KaseyaOne username and company name. Click Next.
  - Note: If you are currently logged in to KaseyaOne, you are not prompted to enter your KaseyaOne credentials. You are automatically logged in to the UniView Portal portal without doing the remaining steps in this procedure.



24

Kaseya		
	Username *         ds         ormpany Name *         username *         Max         Description         Enter username & company name         Nex         Q         Dent have an account yet?         Hease contact support to request one.	
	Download the KaseyaOne app Constraints of the Constraints of the Cons	

5 Enter your KaseyaOne password. Click Log In.

Kaseya		
	terreretered ended	
	<u>Helo &amp; Support</u>   € Kaseya 2024	



6 Enter your two-factor authentication (2FA) code, then click **Verify**. (You can obtain the code from your authenticator app.)

Kaseya		
	Verification   Please open your authentication app and enter the code below. Authentication code *   40   Verify Back to Login	
	Help & Support   © Kaseya 2024	

- 7 You are logged in to the UniView Portal:
  - Note: If you see a warning message indicating that your UniView and KaseyaOne usernames do not match, run this procedure to resolve the issue: "To remove an older KaseyaOne/UniView mapping that was created with mismatched user names".



JNIVIEW	Dashboard F	Protect Jobs	Organizatio	ons	l 🧐 🧐 db 🚬 hitre
ashboard					Scope Organization
Appliances	3 offline	▲ Alerts		30	S Low Space Appliances 2 ☐ Local Storage Used 72.7 TB
Active Jobs					Completed Jobs
Job Name	Appliance	Assets	Progress	Duration	
Replica Restore	recovery-8120s- 5	3		00:07:33	530
Backup image	recovery-8120s-	2		00:04:15	265
Backup 139-99 image	recovery-8120s-	1		00:00:26	0 Apr 06 Apr 07 Apr 08 Apr 09 Apr 10 Apr 11 Apr 12 Apr 13 Apr 14 Apr 15 Apr 16 Apr 17 Apr 18
	See A	All			Success Missed
Recent Jobs					
Appliance	-lot	Name	Ту	ne	Started Asset

## To remove an older KaseyaOne/UniView mapping that was created with mismatched user names

Single-sign on with KaseyaOne credentials now requires matching KaseyaOne and UniView usernames. If you had enabled SSO with mismatched user names in a previous release and received a warning message when logging in with your KaseyaOne credentials, use this procedure to remove the mapping of your mismatched UniView Portal and KaseyaOne user accounts.

After running this procedure, simply log in using your KaseyaOne credentials (see "To log in with KaseyaOne credentials").

**Note:** To disable login with KaseyaOne for all UniView Portal users, see "To disable or re-enable Login with KaseyaOne".

To remove the KaseyOne/UniView mapping:

- 1 Click your username and select **Disable Login with KaseyaOne**. Click **Disable** to confirm.
  - Note: If you do not see *Disable Login with KaseyaOne*, this procedure is not applicable because your KaseyaOne and UniView usernames already match (or the KaseyaOne integration has not been added to UniView Portal).



JNIVIEW	Dashboard F	Protect Jobs Organi	zations			ම	<b>30</b>	🧭 🔵 dbumuti@unitre
Dashboard					Scop	e	~	db <u>arratt@unitron</u> ds.com
B Appliances	3 offline	▲ Alerts	30	S Low Space Appliances	2		ocal (	Reset Password
		Disable Kas	eyaOne			0	/	Log out
Active Jobs Job Name	Appliance		u wish to disable Login with Kaseya ( et portal with Kaseya One credential:	One for your user? So, you are not able to login s. Cancel Disable		6		ල්
LOAD JOB ALL ASSETS 5	Reg	3		530				

2 The mapping is removed. You can now log in using your KaseyaOne credentials.

#### To log out of the UniView Portal

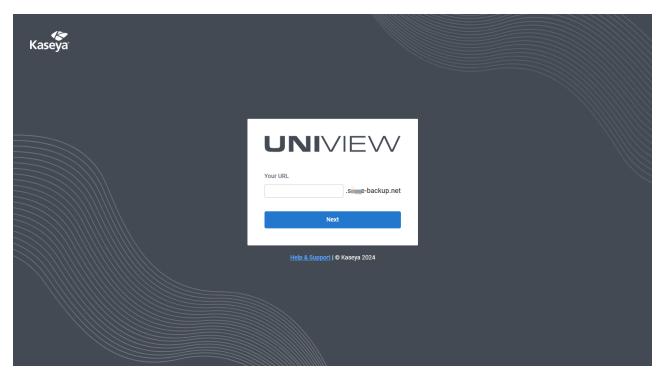
1 Click your username and select Log out.

	Protect Jobs Organizations		🔞 🚇 🧑 🔵 dba 🚬 itre 😿
Dashboard		Scope All	e dt ds.com
B Appliances 3 offline	▲ Alerts 30	S Low Space Appliances 2	Reset Password

2 You are logged out of the portal and the Login page displays.

**Note:** If you had logged in by using KaseyaOne, you are also logged out of your KaseyaOne session.





#### To reset your UniView Portal password

1 Click your username and select **Reset Password**.

L	JNIVIEW	Dashboard	Protect	Jobs	Organizations			¢	<u>8</u>	?	odba 🚬 ni	tre	ĸ
	Dashboard						Scope All		~	d d	Dark Theme	om	1
	a Appliances	3 offline		▲ Alert	s 30	S Low Space Appliances 2		2	ocal (		Password ut		

2 On the Forgot Password page, enter the email address and homerealm associated with your portal account. Click **Reset**.



Kaseya		
	A	
	Forgot Password	
	We will send you an email to reset your password.	
	Email	
	dt ids.com1	
	Your URL	
	s e-backup.net	
	Reset	
	3	
	Back to Login	
	Help & Support   © Kaseya 2024	

3 Check your email to reset your password.

Kaseya		
	Email Sent	
	An email with a password reset link has been sent to you.	
	Back to Login	
	Help & Support   © Kaseya 2024	



**Getting Started** 

### **Additional resources**

For additional resources, click 🙆:

UNIVIEW	Dashboard Prot	ect Jobs Organizations	3		tê 📮 🤨	odb <del>arrett@ami</del> tre <u>14</u>
Dashboard					Help Knowledge Base Video Tutorials	Lizati Click here
B Appliances	3 offline	Alerts	30	S Low Space Appliances	Status Suggest A Feature Release Notes	Used 72.7 TB
Active Jobs				Completed Jobs	Portal Guide API Documentation	ල
Job Name Replica Restore	Appliance recovery-8120s- 50017	Assets Progress	Duration 00:06:04	530	Legal Terms of Use Privacy Policy	
Backup Copy	Regression-944S	3	00:00:55	265	V2.34 - 2023-04-20     What's New	

If you're logged in to KaseyaOne, click III to access the KaseyaOne application launcher:

UNIVIEW	Dashboard Prot	tect Jobs	Organizations				:	ණ 🚊	?	dburrenwer	
Dashboard						Sco		~	Organi: All	zation	L C C C C C C C C C C C C C C C C C C C
UNIVIEW	Dashboard Pro	otect Jobs	Organizations					Kaseya On	e 🖍		
Dashboard							cope All	My IT C	omplete		Î
Duonisouru									ompliance Ianager		lPoint skup
B Appliances	3 offline	▲ Alerts		30	S Low Space Appliances	2		Шп	Glue	💰 Roo	cketCyber
Active Jobs					Completed Jobs			UV	niview	VSA VS/	4
Job Name	Appliance	Assets	Progress	Duration	795			Discove	r More		
Replica Restore	recovery-8120s- 577	3		00:07:33	530		-		<b>udIT</b> ales Prese	ntation System	
Backup image	recovery-8120s- 5	2		00:04:15	265	•			utotask loud PSA		
Backup 139-99 image	recovery-8120s- 5(7	1		00:00:26	0 Apr 06 Apr 07 Apr 08 Apr 09 Apr	10 Apr 11	Apr 12		MS rofessiona	l Service Automa	tion
	See	All			Success Missed				<b>ullPhish ID</b> ecurity Aw	areness Training	
								c	loud Conti	nuity for PCs	



### Switching to Dark Theme view

With Dark Theme view, UI pages display with a dark background. To enable Dark Theme view, click your username and select the **Dark Theme** toggle:

UNIVIEW	Dashboard Protect Jobs Or	ganizations		gi 🖉 🧿 db=itre 🗹
Dashboard				Scope dt ds.com
B Appliances	3 offline Alerts	30	S Low Space Appliances	2 Local S Log out
UNIVIEW	Dashboard Protect Jobs Or	ganizations		영 🖁 🧿 dba <b>nning</b> itre 📧
Dashboard				Scope dbar dbar dbar dbar dbar dbar dbar dbar
Appliances	3 offline 🔬 Alerts	30	S Low Space Appliances	2 Local E Reset Password Log out
Active Jobs			Completed Jobs	
Job Name	Appliance Assets P	rogress Duration		
LOAD JOB ALL ASSETS 5	R 1-944S 13 -	00:09:43	530	<u> </u>
Backup Jo HYP	Re n-944S 1 -	00:07:06	265	
Replica Restore	recovery-8120s- 2 - 5 7	00:05:59		
	See All		Apr 06 Apr 07 Apr 08 Apr 09 A	
Recent Jobs				
Appliance	Job Name	Туре	Started	Asset
Re1-944S	Schedule-Three-	Backup	04/18/23 2:39 PM	RHEL7-4
Regulation-944S	Schedule-One-196-4	Backup	04/18/23 2:39 PM	Win2016-DC



## Working with the Dashboard

The Dashboard provides a high-level overview of your Unitrends environments. By using the Dashboard, you can view the status of all Unitrends appliances at a glance, from a single pane of glass, and promptly address any issues. Dashboard tiles display the status of your appliances, alerts, low space appliances, storage usage, active jobs, completed jobs, and recent jobs.

See these topics for details:

- "Filtering the Dashboard"
- "Appliances tile"
- "Alerts tile"
- "Low Space Appliances tile"
- "Local Storage Used tile"
- "Active Jobs tile"
- "Completed Jobs tile"
- "Recent Jobs tile"

To access the Dashboard, click Dashboard:

NIVIEW	Dashboard Protect	Jobs Organiza	tions		段: 은 (
shboard					Scope Organization
Appliances	3 offline	▲ Alerts	30	S Low Space Appliances	2 E Local Storage Used 72.7 TB
Active Jobs				Completed Jobs	ි ල
Job Name	Appliance	Assets Progres	s Duration	795	
Replica Restore	recovery-8120s-	1	00:06:04	530	·····
Backup Copy	Rn-944S	3	00:00:27	265	
Backup Copy	LHR2-60 000- 5(	1	00:00:25	0 Apr 06 Apr 07 Apr 08 Apr 09 Apr	10 Apr11 Apr12 Apr13 Apr14 Apr15 Apr16 Apr17 Apr18
	See All			Success Missed	
Recent Jobs					
Appliance	Job Na	me	Туре	Started	Asset
recovery-8120s-	Backu	p 139-99 image	Backup	04/18/23 11:32 AM	139-99
recovery-8120s-5		p image	Backup	04/18/23 11:32 AM	139-216



## Filtering the Dashboard

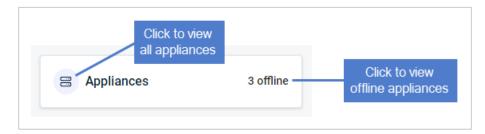
The Dashboard displays relevant information across all appliances that have been added to your backup.net instance. To filter the display, select an organization from the Organization list or a scope from the Scope list:

UNIVIEW	Dashboard Prote	ct Jobs Organizations				🐯 塑 🥐 🔵 dba 💷 Junitre 📧
Dashboard					Scope All	
a Appliances	6 offline	▲ Alerts	36	S Low Space Appliances	2	Initech Inc.
Active Jobs				Completed Jobs		Intuit IT Glue ITGluePD_1
Job Name	Appliance	Assets Progress	Duration	795		Jaskolski - Kassulke
Replica Restore	recovery-8120s-	3	00:07:13			Jaskolski Groun

## Appliances tile

This tile shows the number of online and offline appliances.

- Appliances Click to view all appliances on the Protect page.
- # offline Click to view offline appliances on the Protect page.



## Alerts tile

This tile shows the number of unresolved alerts across all Unitrends appliances (default view), by selected organization, or by selected scope (see "Filtering the Dashboard"). Click the tile to view alerts in BackuplQ. See "Working with Alerts and Conditional Alarms" for details about alert conditions and setting up conditional alarm thresholds.





### Low Space Appliances tile

This tile shows the number of appliances whose available space is less than 30%, across all Unitrends appliances (default view), by selected organization, or by selected scope (see "Filtering the Dashboard").

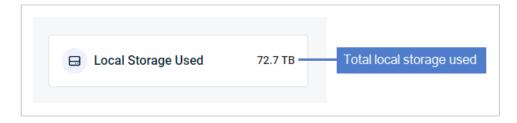
For details on managing appliance storage, see <u>Backup Storage</u> in the <u>Administrator Guide for Recovery Series</u>, Recovery MAX, ION/ION+, and Unitrends Backup.



### Local Storage Used tile

This tile shows the amount of local, on-appliance storage used across all Unitrends appliances (default view), by selected organization, or by selected scope (see "Filtering the Dashboard").

For details on managing appliance storage, see <u>Backup Storage</u> in the <u>Administrator Guide for Recovery Series</u>, <u>Recovery MAX</u>, ION/ION+, and Unitrends Backup.



### **Active Jobs tile**

This tile shows jobs currently running on all Unitrends appliances (default view), by selected organization, or by selected scope (see "Filtering the Dashboard"). The tile displays up to three active jobs (those that started most



Release 2.50 | April 2024

recently).

These details are given for each job:

- Job Name Name of the job.
- Appliance Name of the Unitrends appliance running the job.
- Assets Number of assets in the job.
- Progress Bar indicating job progress.
- Duration Time elapsed since the job started.

To view all active jobs, click See All. Active jobs display on the Jobs page (for details, see "Viewing active jobs").

Job Name	Appliance	Assets	Progress	Duration
Backup pr increment win32	Re on-944S	1		00:05:18
Backup image	recovery-8120s-	2		00:01:52
Backup 139-99 image	recovery-8120s-	1		00:00:41

### **Completed Jobs tile**

This tile shows the number of successful and missed jobs over the last 13 days across all Unitrends appliances (default view), by selected organization, or by selected scope (see "Filtering the Dashboard" above):

- Hover over a point in the graph to see the number of successful and missed jobs on a given day.
- Click **Success** to hide successful jobs.
- Click Missed to hide missed jobs.
- For details on completed jobs, see "Viewing job details".





## **Recent Jobs tile**

This tile shows the three most recent jobs across all Unitrends appliances (default view), by selected organization, or by selected scope (see "Filtering the Dashboard"). These details are given for each job:

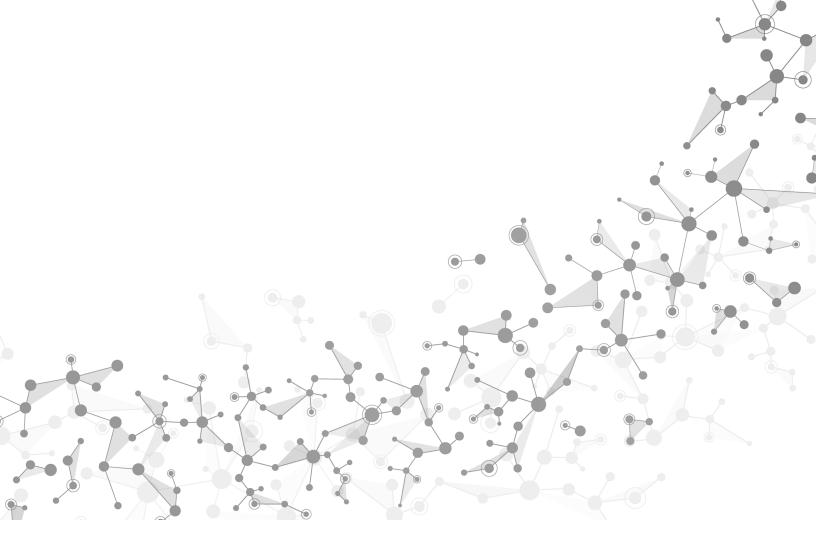
- Appliance Name of the Unitrends appliance where the job ran.
- Job Name Name of the job.
- Type Job type.
- Started Date and time when the job started.
- Asset Asset name.

To view all jobs that ran over the last 13 days, click **See All**. Jobs display on the Jobs page (for details, see "Viewing recent jobs").

Appliance	Job Name	Туре	Started	Asset	
ecovery-8120s-5	Backup 1: ) image	Backup	04/18/23 3:32 PM	10, .9	
ecovery-8120s-500	Backup image	Backup	04/18/23 3:30 PM	13, . 7	
ecovery-8120s-50017	Backup image	Backup	04/18/23 3:30 PM	1: 6	



This page is intentionally left blank.





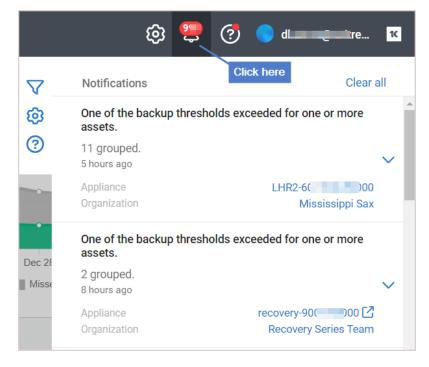
Working with the Dashboard

# Working with Alerts and Conditional Alarms

UniView Portal includes alerts and conditional alarms to quickly notify you of issues.

## Alerts

Alerts generated across all Unitrends appliances are automatically added to BackupIQ. To access BackupIQ, click 🖳



### Alert conditions

By default, alerts are generated for all the categories shown below. In the Alerts view on the Settings page, you can customize the alerts you receive by clicking toggles to disable/enable alert categories:



UNIVIEW Dashboard Protect Job	s Organizations	Click to access Settings	-@ 😌	🧑 🔵 dba 🛛 @unitre	16
Settings					
Alerts Integrations Users Scopes	API Access				
Alert Categories         Category is enabled         P Helix updates         Appliance is offline alerts         Backup agent upgrade available         Storage problems         High storage growth         Inventory Sync warning         Iccensing issues         Password changed         Rebot required         Replica failures         Ransomware	All alert categories are enabled by default. To customize, click toggles to disable/enable by category.				

**Note:** The Alert Categories feature applies to appliances running Unitrends version 10.6.1 or higher. If you have appliances running older Unitrends versions, an alert displays in the UniView Portal. Upgrade the appliances listed in the alert to improve alerting and enable alert category toggles for these older appliances.

	ct Jobs Organizations	têjî 📒 🧑 🔵 dinami ( mitre	14
Please upgrade the following appliances to improve	alerting and to enable alert category toggles: VMware-UB-1097,	VMware-CE-UB-C6	×
Dashboard	Upgrade these appliances to improve alerting	Scope Organization	53

#### Additional alerts

In addition to the default alerts described above, you may receive alerts for conditional alarms, Spanning Microsoft 365 backups, Spanning Google Workspace backups, Spanning Salesforce backups, or Datto Backup for Microsoft Azure (DBMA) backups:

- Conditional alarm alerts are generated if you have set up thresholds for how long a machine can go without a
  good backup or good hot backup copy (formerly known as *replicated backup*). For details, see "Conditional
  alarms".
- Spanning Microsoft 365 backup alerts are generated if you have integrated the Microsoft 365 tenant with the UniView Portal and are running Spanning Microsoft 365 backups. For details, see "Alerts for Spanning Microsoft 365 backup".
- Spanning Google Workspace backup alerts are generated if you have integrated the Google Workspace domain with the UniView Portal and are running Spanning Google Workspace backups. For details, see "Alerts for Spanning Google Workspace backup".



- Spanning Salesforce backup alerts are generated if you have integrated the Salesforce organization with the UniView Portal and are running Spanning Salesforce backups. For details, see "Alerts for Spanning Salesforce backup".
- Datto Backup for Microsoft Azure (DBMA) backup alerts are generated if you have added the Datto Portal integration to UniView Portal. To add this integration, see "Integrating Datto Portal". For details on Datto alerts, see "Alerts for Datto Backup for Microsoft Azure (DBMA)".

### Alerts and PSA ticketing

If you have integrated your PSA system (ConnectWise Manage, Autotask, BMS, or Vorex), each alert also creates a ticket in the PSA. You can opt to automatically change the status of these tickets in PSA once the alert condition is resolved. (See "Working with your Autotask Integration", "Working with your ConnectWise Manage integration", or "Working with your BMS or Vorex integration".)

## Email alerts

You can also opt to receive email notifications for alerts. For details, see "To set up email notification for alerts".

For details on viewing and managing alerts, see "Managing alerts".

## Alerts for Spanning Microsoft 365 backup

If you are using Spanning Backup for Microsoft 365, you can enable BackuplQ to generate alerts for failed or partial backups. To enable these alerts, the following requirements must be met:

- Your Spanning Backup for Microsoft 365 tenant must be integrated with the UniView Portal. To add this integration, see "Integrating a Microsoft 365 tenant".
- Your Spanning Microsoft 365 tenant must be mapped to an organization in the UniView Portal. If the tenant integration was added in the UniView Portal, the tenant has been mapped to an organization. To view or modify a tenant's mapping, see "To map Microsoft 365 tenants to organizations".

Once you have enabled Spanning Microsoft 365 alerts, BackupIQ generates alerts as follows:

- BackuplQ generates alerts for tenants that have been mapped to organizations only.
- BackuplQ generates one alert per tenant.
- An alert is generated for the tenant if both of these conditions are met:
  - One or more backups over the last 7 days has either failed or was partially completed (the backup's status is Failed or Partial).
  - The Failed or Partial condition persists for 2 days.
- BackupIQ removes a Failed or Partial backup alert once the domain has had all successful backups for the last 7 days. (If a domain's Partial backup alert is followed by a Failed backup alert, BackupIQ removes the Partial backup alert and generates a Failed backup alert.)
- For each alert, BackupIQ also generates a ticket for Autotask, ConnectWise Manage, BMS, or Vorex integrations.



- Release 2.50 | April 2024
- You can also opt to receive email notifications for these alerts. To receive email notifications, run the "To set up email notification for alerts" procedure.

Note: For more on working with Microsoft 365 in UniView, see "Working with Microsoft 365".

#### To map Microsoft 365 tenants to organizations

- **1** Log in to the UniView Portal.
- 2 Click **Protect** and select the **Microsoft 365** view.
- 3 To create a mapping, click i and select an organization. Repeat as needed for each tenant.
  - Note: Backup alerts are not generated if the tenant has not been mapped to an organization in the UniView Portal.

rotect														+ Add Cus	tomer
ត្ <sup>7</sup> Spanning Licenses ្រ															
Assigned 🚺 21000   🔁 10	00														
Remaining 🚺 20   🖻 11	0														
Purchased 🚺 21020   🔁 2	10														
Appliances Assets	Microsoft 365 Goog	gle Workspace	Salesforce	Microsoft A	zure										
omain Name 🗢	Organization 🗘	Licenses	Expiration	Users Coverage	Storage	$\geq$	•	. 1	• •	Þ	♪	C	Last 30 Bac	kups	
🛯 📁 ohaska - Beahan	None @1	Click to map organization	9/6/25	1154%	▲ 85.5 MB ■ 52.4 MB	×	⊘ (	) >	0	0	٢	Ģ			Ø
Big Numbers	Brian Edwards 🔺	17777 🕑	9/6/25	115%	<b>88.8 PB</b>	0	0			Ø	Ċ	Ċ			C
	Brown Brothers Bottling^				93.1 GB										
Brown and Sons	Brown Inc2	🗵 – Select an organ	7/26/26 nization to crea	te the mapping	& - 2 -	-			-	-	Ċ	Ģ			ß
Mister Crabs	Buckridge -	<b>፤</b> 1 ℃	12/30/26	50%	<b>@</b> -	×	× >	< >	( -	_	Ċ	Ċ			C
	Runolfsdottir	🖻 85 🗹			9 -										
	Carroll -	🗓 2 🕑 🗖 3 🕑	2/28/29	<mark>58%</mark>	42.7 MB 9.9 MB	×	X	< 🤇		0	¢	Ģ			ß
Pinkston Farms	Gislason	030													

- 4 Once mappings are created, BackuplQ generates an alert if one or more backups over the last 7 days is in Partial or Failed status, as shown below:
  - **Note:** Backup status information is received once per day from Spanning for Microsoft 365. An alert is generated if the Partial or Failed condition persists for 2 days.
  - Organization link Click to view organization details.
  - Domain link Click to view the Protect > Microrsoft 365 page, which shows tenant mappings, license and storage information, and the status of each tenant's recent backups (e.g., Mail Backup, Calendar Backup,



Contact Backup, Drive Backup, SharePoint Backup, and Teams Channel Backup). For details, see "Working with Microsoft 365".

- Module link Click to access Spanning Backup for Microsoft 365.
- Platform link Click to access Spanning.com.

JNIVIEW	Dashboard Pr	otect Jobs Organizati	ons			÷	🧭 🔵 dbQunitre
ashboard					$\nabla$	Notifications	Alerts display Clear a
					ø	Backup was not completed	
					?	Jan 26, 09:18 am Failed	backup
Appliances	3 offline	▲ Alerts	30	S Low Space Appliances		Organization	Another Org
						Domain	FA.L2D4
						Module	Microsoft 365
						Platform	Spanning
Active Jobs				Completed Jobs		Backup was partially comp	eted.
						Jan 26, 09:18 am Parti	al backup
Job Name	Appliance	Assets Progress	Duration	795		Organization	78910 Corporation
Backup prlimm 3	Recipin-944S	1	00:20:04			Domain	P/ 1L1
incre				530		Module	Microsoft 365
						Platform	Spanning
WinXP-A	Reg on-944S	1	00.15.15				

### Alerts for Spanning Google Workspace backup

If you are using Spanning Backup for Google Workspace, you can enable BackupIQ to generate alerts for failed or partial backups. To enable these alerts, the following requirements must be met:

- Your Spanning Backup for Google Workspace domain must be integrated with the UniView Portal. To add this integration, see "Integrating a Google Workspace domain".
- Your Spanning Google Workspace domain must be mapped to an organization in the UniView Portal. If the domain integration was added in the UniView Portal, the domain has been mapped to an organization. To view or modify a domain's mapping, see "To map Google Workspace domains to organizations".

BackuplQ generates alerts as follows:

- BackupIQ generates alerts for domains that have been mapped to organizations only.
- BackuplQ generates one alert per domain.
- An alert is generated for the domain if both of these conditions are met:
  - One or more backups over the last 7 days has either failed or was partially completed (the backup's status is Failed or Partial).
  - The Failed or Partial condition persists for 2 days.
- BackuplQ removes a Failed or Partial backup alert once the domain has had all successful backups for the last 7 days. (If a domain's Partial backup alert is followed by a Failed backup alert, BackuplQ removes the Partial backup alert and generates a Failed backup alert.)
- For each alert, BackupIQ also generates a ticket for Autotask, ConnectWise Manage, BMS, or Vorex integrations.
- You can also opt to receive email notifications for these alerts. To receive email notifications, run the "To set up email notification for alerts" procedure.



Note: For more on working with Google Workspace in the UniView Portal, see "Working with Google Workspace".

#### To map Google Workspace domains to organizations

- **1** Log in to the UniView Portal.
- 2 Click **Protect** and select the **Google Workspace** view.
  - 3 To create a mapping, click *d* and select an organization. Repeat as needed for each domain.
  - **Note:** Backup alerts are not generated if the domain has not been mapped to an organization in the UniView Portal.

จ	Spanning Licenses 🚯											
Assi	igned 🗵 2080   🖻 0											
Rem	naining 📔 900   🖻 0											
Purc	chased 🚺 2980   🖻 0											
Ap	opliances Assets Micro	osoft 365 Google Works	pace									
Dor	nain Name 🗢	Organization 🗢										
		organization	Standard Licenses	Expiration	Users Coverage	Storage			$\geq$		**	
US	Anderson - Lang	None 🕑	Standard Licenses	Expiration 7/26/22	Users Coverage	Storage 19073.5 Mb 2861 Mb		<u>∧</u>			**	
	Anderson - Lang Bailey - Schaden	•				💩 19073.5 Mb		_				
US	•	None C None C	E 100 @ E 5 @ E 177 @	7/26/22	50%	<ul> <li>19073.5 Mb</li> <li>2861 Mb</li> <li>19073.5 Mb</li> </ul>	$\odot$	0	0	×	×	
US	Bailey - Schaden	None 🕜	i 100 €	7/26/22	50%	<ul> <li>19073.5 Mb</li> <li>2861 Mb</li> <li>19073.5 Mb</li> <li>2861 Mb</li> <li>2861 Mb</li> <li>2861 Mb</li> <li>19073.5 Mb</li> </ul>	0 0	⊙ ⊙	•	×	×	
US US	Bailey - Schaden Fisher and Sons GoogleWorksr	None 🕑 None 🕑 — 1 Choose an organization Hermann - Balistreri Hettinger Inc	<ul> <li>■ 100 @</li> <li>■ 5 @</li> <li>■ 177 @</li> </ul>	7/26/22 7/26/22 7/26/22	50%	<ul> <li>19073.5 Mb</li> <li>2861 Mb</li> <li>2861 Mb</li> <li>281 Mb</li> <li>281 Mb</li> <li>281 Mb</li> <li>281 Mb</li> <li>281 Mb</li> <li>19073.5 Mb</li> <li>2861 Mb</li> <li>19073.5 Mb</li> </ul>	⊙ ⊙ ⊙	<ul><li>⊙</li><li>⊙</li><li>⊙</li></ul>	© ©	× × ×	× × ×	
20 20 20 20 20 20 20 20 20 20 20 20 20 2	Bailey - Schaden Fisher and Sons GoogleWorksr [es] nain (F/] GoogleWorksp [es] nain	None C None C None C Choose an organization Hermann - Balistreri	€ 100 € € 5 € € 177 € ✓ 50 € 7 €	7/26/22 7/26/22 7/26/22 7/26/22 7/26/22	50% 50% 50%	<ul> <li>19073.5 Mb</li> <li>2861 Mb</li> <li>19073.5 Mb</li> <li>2861 Mb</li> <li>19073.5 Mb</li> <li>2861 Mb</li> </ul>	⊙ ⊙ ⊙	<ul> <li>○</li> <li>○</li> <li>○</li> <li>○</li> </ul>	© © ©	× × × ×	× × × ×	

4 Once mappings are created, BackuplQ generates an alert if one or more backups over the last 7 days is in Partial or Failed status, as shown below:

**Note:** Backup status information is received once per day from Spanning for Google Workspace. An alert is generated if the Partial or Failed condition persists for 2 days.

- Organization link Click to view organization details.
- Domain link Click to view the Protect > Google Workspace page, which shows domain mappings, license and storage information, and the status of each domain's recent backups (e.g., Site Backup, Document Backup, Mail Backup, Calendar Backup, and Contact Backup). For details, see "Working with Google Workspace".
- Module link Click to access Spanning Backup for Google Workspace.



• Platform link – Click to access Spanning.com.

NIVIEW	Dashboard Protect	t Jobs Organizations				© 😕	🧑 🔵 db <b>a</b> Itre
Dashboard					<b>▽</b> ⊗	Notifications 2 Backup was not complete	Alerts display Clear a
					() ()	Feb 23, 05:54 pm Faile	d backup
B Appliances	3 offline	▲ Alerts	30	Low Space Appliances		Organization Domain G Module	212 Bronx oogleWorkspace rec. Domain , Google Workspace
Active Jobs				Completed Jobs		Platform Backup was partially com	Spanning
Job Name	Appliance	Assets Progress	Duration	795			al backup
Backup prlinux23 incre	Research on-944S	1	00:20:04	530		Domain G Module	oogleWorkspace Tanif Tanhain (P Google Workspace
	Demoster 0440		00.15.15			Platform	Spanning

### Alerts for Spanning Salesforce backup

If you are using Spanning Backup for Salesforce, you can enable BackuplQ to generate alerts for failed backups. To enable these alerts, the following requirements must be met:

- Your Spanning Backup for Salesforce organization must be integrated with the UniView Portal. To add this integration, see "Integrating a Salesforce organization".
- Your Salesforce organization must be mapped to an organization in the UniView Portal. If the org's integration was
  added in the UniView Portal, the mapping has been created. To view or modify an organization's mapping, see "To
  map Salesforce organizations".

BackupIQ generates alerts as follows:

- BackupIQ generates alerts for Salesforce organizations that have been mapped to UniView organizations only.
- BackupIQ generates one alert per organization.
- An alert is generated for the organization if both of these conditions are met:
  - One or more backups over the last 7 days has failed (the backup's status is Failed).
  - The Failed condition persists for 2 days.
- BackupIQ removes a Failed backup alert once the organization has had all successful backups for the last 7 days.
- For each alert, BackupIQ also generates a ticket for Autotask, ConnectWise Manage, BMS, or Vorex integrations.
- You can also opt to receive email notifications for these alerts. To receive email notifications, run the "To set up email notification for alerts" procedure.

Note: For more on working with Salesforce in the UniView Portal, see "Working with Salesforce".

#### To map Salesforce organizations

- **1** Log in to the UniView Portal.
- 2 Click **Protect** and select the **Salesforce** view.



- 3 The Domain Name column lists your Salesforce organizations. To create a mapping, click 🖉 and select an organization. Repeat as needed for each organization.
  - **Note:** Backup alerts are not generated if the Salesforce organization has not been mapped to an organization in the UniView Portal.

NIVIEW	Dashboard Protect Jobs Organ	izations								ලා 😕	🧑 🔵 db 🔍	_ hitre
Protect											+ Add C	ustomer
្ត7 Spanning Licenses 🔅												
Assigned 2080												
Remaining 900	<b>0</b>											
Purchased 2980	<b>T</b> 0											
Appliances Sales			force	dicrosoft Azure								
Domain Name ÷	Organization \$	Licenses	Expiration	Users Coverage	Storage 🗓	e ç	Ę	♪	ÿ	Last 30 B	ackups	
💩 alvina.info	212 Bronx 🖄	793	7/26/2	239%	▲ 976.6 KB ■ 1.9 MB	× <	×	×	×			Ľ
Bahringer LLC	212 Bronx 🕜	984	7/26/2	167%	▲ 976.6 KB ■ 1.9 MB	××	0	×	0			C
S Casper Inc	None 2	756	7/26/2	75%	<ul> <li>976.6 KB</li> <li>1.9 MB</li> </ul>	⊘ ×	0	×	0			C
Dach LLC	Hermann - Balistreri	<b>6</b> 0	7/26/2	83%	<ul><li>976.6 KB</li><li>1.9 MB</li></ul>	××	0	×	0			C
Booley - Schinner	Hettinger Inc	300	7/26/2	14%	4 976.6 KB	0	×	×	<b>⊘</b>			Ľ
	Hewitt Associates, Inc.			tion to create the m								
		69	7/26/2	338%	C 749.6 MB	$\odot$		$\sim$	Х			C
ıs∎ elyse.net	Huge Micro Construction	•			480.7 MB							

4 Once mappings are created, BackuplQ generates an alert if one or more backups over the last 7 days is in Failed status, as shown below:

**Note:** Backup status information is received once per day from Spanning for Salesforce. An alert is generated if the Failed condition persists for 2 days.

- Organization link Click to view organization details.
- Domain link Click to view the Protect > Salesforce page, which shows organization mappings, license and storage information, and the status of each organization's recent backups. For details, see "Working with Salesforce".
- Module link Click to access Spanning Backup for Salesforce.
- Platform link Click to access Spanning.com.



46

NIVIEW	Dashboard Protect	Jobs Organi	izations						@ € ⑦ ● •	ıitr 1
a dama Ota tara								7	Notifications	Clear all
ackup Status								©	Backup was not completed. 18 minutes ago	
Appliances Assets	Microsoft 365	Google Works	bace Sal	esforce				Ø	Organization Domain	ABCE amelia.org
Domain Name 🕈	Organization 🗢	Licenses	Expiration	Users Coverage	Storage 🕔	C	Ģ	Ţ	Module Platform	Salesforce Spanning
📧 amelia.org	ABCD 🕜	770	7/26/2	3%	▲ 869.8 MB ■ 472.1 MB	0	0	0	Latest backup failed. Failed backup	
us ava.info	ABCD 🕜	888	7/26/2	157%	4 321.4 MB 168.8 MB	×	×	×	Organization Domain	ABCI ava.info
📧 jaeden.com	ABCD 🕜	142	7/26/2	1548%	▲ 412.9 MB ■ 135.4 MB	×	0	0	Module Platform	Salesforce Spanning
📧 karlie.biz	ABCD 🕜	993	7/26/2	114%	<ul> <li>768.7 MB</li> <li>224.1 MB</li> </ul>	0	$\times$	0		



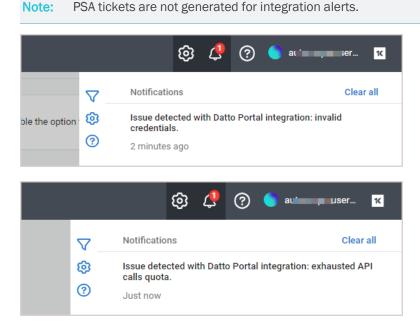
## Alerts for Datto Backup for Microsoft Azure (DBMA)

If you are using DBMA, you can enable BackuplQ to generate alerts for integration issues and failed Microsoft Azure backups. To enable these alerts, the following requirements must be met:

- The Datto Portal integration has been added to UniView Portal. (To add this integration, see "Integrating Datto Portal".)
- Your Datto clients are mapped to organizations in the UniView Portal. During integration, all clients are automatically mapped to UniView Portal organizations. (If needed, you can modify these mappings as described in "Mapping Datto Portal clients to organizations".)

Once you have enabled DBMA alerts, BackupIQ generates integration alerts and backup alerts.

• Integration alerts are generated if UniView Portal cannot connect to DBMA due to invalid credentials or if the maximum API calls quota has been reached:



- Microsoft Azure backup alerts are generated as follows:
  - BackupIQ generates backup alerts for assets whose Datto clients have been mapped to organizations only.
  - BackupIQ generates one backup alert per asset. Backup alerts are grouped by DBMA module and UniView Portal organization.
  - By default, a backup alert is generated if a successful backup has not completed for the asset within the last 24 hours. If needed, you can modify this 24-hour threshold setting (see "Conditional alarms").
  - BackuplQ removes a backup alert once the asset has had a successful backup.
  - Organization link Click to view organization details.
  - Module link Click to access the Datto Portal.



- Asset link - Click to view details on the Protect > Microsoft Azure page.

Microsoft Azure backup alert in BackupIQ:

	¢	<u>9</u>	?	🔵 dt	_ tre	16	
$\nabla$	Notifications				Clear	all	
ŵ	Azure Backup Mi	issed					*
?	1 grouped. 4 minutes ago					^	l
	Organization Module				erdam Artisans Iicrosoft Azure		
	Backup was not	complet	ted with	in 1 hour(s)	threshold		
	4 minutes ago						
	Asset			a	msart-az-dc-01		

Microsoft Azure backup alert for FILESERVER asset in Datto Portal:

Sengupta-CSiris SN: 0B3	Model Client CLDSIRIS Sengup	a Technologies		Last Checkin 4 minutes ago	Tickets 0	Total Managed Disk 254 GB
Protected System	Unprotected	Latest Screenshot	Last Offsite Sync	Last Local Backup	La	st 10 Backup Attempts
FILESERVER	0 volumes	a year ago	a year ago	a year ago	•	
SSengup-vm1	0 volumes	5 hours ago	21 minutes ago	21 minutes ago	•	

- For each backup alert, BackupIQ also generates a ticket for Autotask, ConnectWise Manage, BMS, or Vorex integrations. (Tickets are NOT generated for integration alerts.)
- You can also opt to receive email notifications for these alerts. To receive email notifications, run the "To set up email notification for alerts" procedure.

Note: For more on working with DBMA in UniView, see "Working with your Datto Portal integration".

## Managing alerts

Use these procedures to view and manage alerts:

- "To view BackuplQ alerts"
- "To dismiss a group of alerts"



- "To dismiss BackupIQ alerts in bulk by organization or scope"
- "To dismiss all BackuplQ alerts"
- "To set up email notification for alerts"

#### To view BackupIQ alerts

**1** Click the BackupIQ icon in the upper-right corner.

	Protect Jobs	Organizations	¢	9 <b></b>	7 🔵	db	е <mark>1к</mark>
		Click the BackupIQ	Ricon		Organizatio	n	^
Dashboard		AI	II N		All	~	C3

2 Alerts display:

UNIVIEW	Dashboard Pro	otect Jobs Organizat	ions			ŵ 📒	🧭 🔵 dbar 🔤 hitre 📧	
Dashboard				¢.	√ ĝ	Notifications Inventory full sync comp Jan 26, 06:40 am		nce name, appliance detail
Appliances	3 offline	▲ Alerts	30	S Low Space Appliance	<u> </u>	Appliance Organization	Regression-944S C King Bee	Click to manage appliance Organization name,
						One of the backup thres assets.	holds exceeded for one or more	click to view organization detail
Active Jobs				Completed Jobs # of alerts in group		88 grouped. Jan 25, 02:03 pm	~	
Job Name	Appliance	Assets Progress	Duration	795		Appliance Organization	Regr Dn-944S	
Backup prlinux23 incre	Remon-944S	1	00:20:04	530		Issue within SaaS Prote		
WinXP-A	Reon-944S	1	00:15:15	265		5 grouped. Jan 23, 09:18 am	~	
Replica Restore	recovery-8120s- 50	3	00:04:19	0		Client Module	212 Bronx - d Datto SaaS Protection - M365	
	0	A 11		Apr 06 Apr 07 Apr 08 Apr Success Missed		One of the backup thres assets.	holds exceeded for one or more	
	See /	411				8 grouped. Jan 19, 04:28 pm	~	
Recent Jobs						Appliance Organization	recovery-8032s 🖾 Helter Skelter	

- 3 (Optional) Click an asset to display asset detail. The following information is given for each asset:
  - Type icon Indicates the asset type. Hover over the icon for type description. Asset type examples: VMware, Windows, SQL, OS (for non-Windows assets protected by installing the Unitrends agent).
  - Asset name.
  - Last Full Backup Size Size of the last successful full backup.
  - Last Local Backup Number of minutes, hours, days, weeks, or months since the last backup.
  - Last Backup Copy Number of minutes, hours, days, weeks, or months since the last hot or cold backup copy. – displays if no backups have been copied.
    - Hot backup copies reside in the Unitrends Cloud or on a secondary appliance.
    - *Cold backup copies* reside on storage managed by other cloud storage providers (e.g., Amazon S3 or Rackspace) or on other backup copy media (e.g., a tape or NAS storage device).



- Last Certified Number of minutes, hours, days, weeks, or months since the last backup was certified by a data copy access (DCA) job.
- Recovery Points Lists the asset's local backups and backup copies. Scroll to view older recovery points.

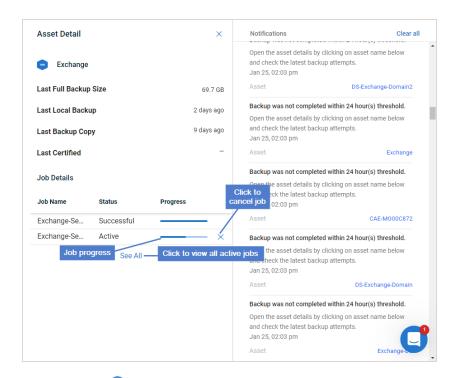
Icons display, indicating the status of each local backup and backup copy. Click a status icon to view job details. Hover over **Legend** for a description of each status.

Hover over a backup copy icon to see whether it is a hot or cold copy.

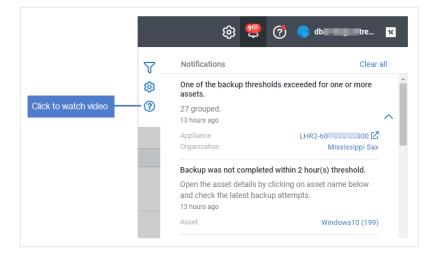
UNIVIEW	Dashboard	Protect	Jobs	Organizations					® 🚍 📀	db <b>a atta</b> unitre <mark>1</mark> K
Dashboard				V	Asset Detail		×	*	Notifications	Clear all
Dashboaru		lover to vie	ew asse	et type	re-VM Instance 2 Asset de	etails display			Replication was not completed w threshold.	ithin 24 hour(s)
B Appliances	3 offline		Alerts	s	13				Open the asset details by clicking and check the latest backup atten	
					Last Full Backup Size Last Local Backup		69.7 GB		9 hours ago Asset Click asset	Win8 (201)
Active Jobs					Last Backup Copy		days ago days ago		Recovery point has been certified	by a DCA job
Job Name	Appliance	As	ssets	Progresss	Last Certified	20			Backup successful but was not ce	elow
Backup prlinux23	Regression-944	5	1		Hover to view the i Recovery Points		egend (1)	•	Backup data ingested successfully Backup job produced warnings	
WinXP-A	Regression-944	3	1				ckup Copies	×	Backup failed Replication was not completed w threshold.	L01-188
Replica Restore	rece, 8120s- 50017		3		January 27, 2023, 12:01 am	•	•		Open the asset details by clicking and check the latest backup atten	
		41		Click a sta	January 26, 2023, 12:01 am itus icon to view job details	-	•		9 hours ago	Win10_EF 92
	5	ee All		_	January 24, 2023, 12:01 am	•	•		Replication was not completed w	
					January 23, 2023, 12:01 am	•	•		threshold.	
					January 22, 2023, 12:01 am	•	lot Copies: 1	ī.	Open the asset details by clicking and check the latest backup atten	
Recent Jobs					January 21, 2 Hover to view		-		9 hours ago	npro.
					January 20, 2 backup copy type (ho				Asset	SQL2012 -17-01
Appliance		Job Name		Тур		•	•	-	Replication was not completed w	ithin 24 hour(s)
recovery_8120e_5(7		Rackup 13	0-00 in	nana Rar	4		) i		threshold.	

• If a job is running, job details display. Click X to cancel a running job. Click See All to view all active jobs.





4 (Optional) Click ⑦ to watch the <u>Unitrends - Conditional Alarms video</u>:



5 (Optional) Click  $\mathbf{V}$  to filter the list by organization:



		© 📮 🕸	🔵 dba 🚬 tre 🥈
Click to filter list by rganization or scope	-7	Notifications	Clear all
gamzadon or scope	ଷ	One of the backup thresholds ex assets.	ceeded for one or more
	0	27 grouped. 13 hours ago	-
		Appliance Organization	LHR2-60
		Backup was not completed with	in 2 hour(s) threshold.
		Open the asset details by clickin and check the latest backup atte 13 hours ago	•
		Asset	Windows10 (199)

- Select an organization and/or scope from the Organization and Scope lists. To clear filters, select **All** from the Organization and Scope lists.
- Click **X** to exit.

ns		@ 🜻 🧃	) 😑 db <b>a atija i</b> tre ҡ
	Select a scope	< Notifications	Clear all
		One or more Helix requests fa	iled.
	Organization	2 grouped. Sep 8, 02:11 am	~
	212 Bronx	Appliance Organization	LHR2-60 - Jou Jou J0 🖸 212 Bronx
	Select an organization Dismiss	One of the backup thresholds assets.	exceeded for one or more
		3 grouped. Sep 7, 02:57 am	~
		Appliance Organization	LHR2-60 - 30 JUJ 00 🗹 212 Bronx
		One of the backup thresholds assets.	exceeded for one or more
		2 grouped. Aug 30, 08:01 am	~
		Appliance Organization	vmware-ub-2136 212 Bronx
		Inventory full sync completed	with 3 warning(s).
		Jun 4 2021, 05:00 pm	
		Appliance Organization	LHR2-6( 00 🖸

6 (Optional) To view group details, click the down arrow to expand the group.



Release 2.50 | April 2024

Details display for each alert in the group. Alert details include:

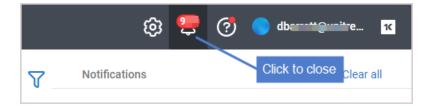
- 🕜 icon Click to view related KB articles.
- Alert message (if available). Example: In job queue (job #1216).
- The date and time the alert was generated.
- Asset Name of the protected asset (if available). Click to view asset details.
- Alert's X icon Click to dismiss the alert.

**Note:** The group's X icon displays above the alerts list. Clicking this icon dismisses all alerts in the group. For details, see "To dismiss a group of alerts".

	© 🤤	🧟 🔵	db <b>a and in ai</b> tre	. 11
7	Notifications		Clea	ar all
3	One or more Helix reques 2 grouped. Sep 8, 02:11 or Click to dismiss Applit Organization		Group Dismiss he group	_
	One of the backup thresh assets.	olds exceede	d for one or more	
	3 grouped Sep 7, 02 Click to show/	hide alerts ir	n group	-^
	Appliance Organization	LHF	2-6 00 ( 212 Bror	_
	Backup was not complet Open the asset details by and check the latest back Sep 7, 02:57 am	clicking on a		Ð
	Asset	WIN-2T	F10P3SHBC\mast	er
	Backup was not complet	ed within 25 h	nour(s) threshold.	
	Open the asset details by and check the latest back Sep 7, 02:57 am	9		
	Asset	WIN-2	TF10P3SHBC\mod	el

7 Click the BackupIQ icon to close the alerts list.



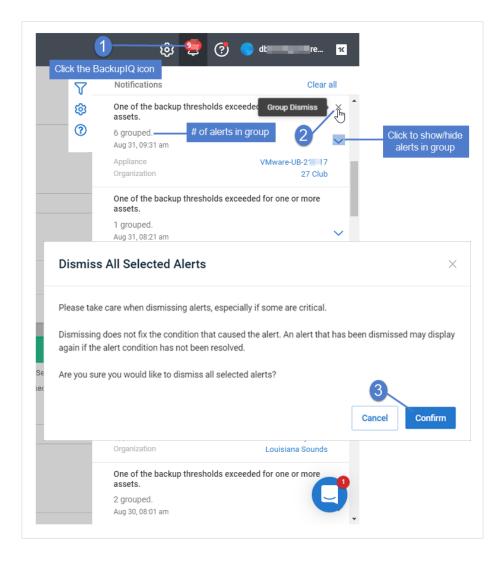


#### To dismiss a group of alerts

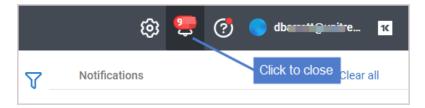
Use this procedure to dismiss a group of alerts. (To dismiss a single alert, click its x icon as described above in "To view BackupIQ alerts".)

- **1** Log in to the UniView Portal with an account that has the Superuser or Admin role.
- 2 Click the BackuplQ icon in the upper-right corner. Alerts display.
- 3 Locate the group in the list and click its X icon. Click **Confirm**.
  - Note: Clearing an alert does not resolve the alert condition. If the alert condition still exists, a subsequent alert will be generated.





4 Click the BackupIQ icon to close the alerts list.



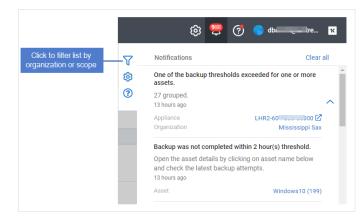
#### To dismiss BackupIQ alerts in bulk by organization or scope

Use this procedure to select and dismiss multiple alerts by organization and/or scope.

- **1** Log in to the UniView Portal with an account that has the Superuser role.
- 2 Click the BackuplQ icon in the upper-right corner.



3 Click V.



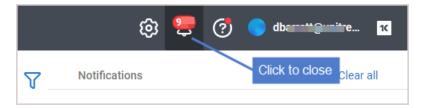
- 4 Select an organization from the Organization list and/or a scope from the Scope list.
- 5 Click Dismiss. Click Confirm.

Note: Clearing an alert does not resolve the alert condition. If the alert condition still exists, a subsequent alert will be generated.

V	Scope	×	N	otifications	Clear all
(Ø	All	~	Aţ	opliance has not been see	en in over 5 minutes.
ct an organization	Organization			hours ago	
▲ Alerts	Mississippi Sax	~		ppliance ganization	LHR2-604 ) Mississippi Sax
	2	Dismiss	as	ne of the backup threshol ssets. 3 grouped.	ds exceeded for one or more
				: 3, 02:01 am	
Dismiss All Selected A	lerts		· · ·	pliance janization	LHR2-604 100 10000 Mississippi Sax
Diasca taka cara uhan dismissir	g alerts, especially if some are critical.			ventory full sync complet	ed with 3 warning(s).
	g alens, especially it some are childal.			o 22, 05:03 pm	
Dismissing does not fix the cond again if the alert condition has n	lition that caused the alert. An alert that has b ot been resolved.	een dismissed may disp		pliance janization	LHR2-604 Mississippi Sax
	smiss all selected alerts?				

6 Click the BackuplQ icon to close the alerts list.





#### To dismiss all BackupIQ alerts

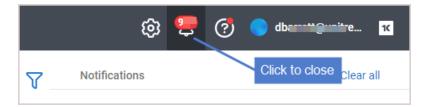
Use this procedure to dismiss all alerts. (To dismiss a single alert, click its X icon as described above in "To view BackupIQ alerts".)

- **1** Log in to the UniView Portal with an account that has the Superuser or Admin role.
- 2 Click the BackupIQ icon in the upper-right corner. Alerts display.
- 3 Click Clear all, then Confirm to dismiss all alerts.

Note: Clearing an alert does not resolve the alert condition. If the alert condition still exists, a subsequent alert will be generated.

JNIVIEW	Dashboard Protect Jobs Organizations		😥 🜻 🧑 🕒 db nitre 💌
Dashboard		√ \$	Notifications 2 Clear all One of the backup thresholds exceeded for one or more assets. 9 grouped. 13 hours ago
Appliances	3 offline     Alerts     30     Source Appliance       Dismiss All Selected Alerts     X	es	Appliance LHR2-66 JPU JD00 C Organization Mississippi Sax Replication was not completed within 24 hour(s)
Active Jobs Job Name	Please take care when dismissing alerts, especially if some are critical.		threshold. Open the asset details by clicking on asset name below and check the latest backup attempts. 13 hours ago
Backup prlinux23 incre	Dismissing does not fix the condition that caused the alert. An alert that has been dismissed may display again if the alert condition has not been resolved.		Asset Windows10ks Replication was not completed within 24 hour(s)
WinXP-A Replica Restore	Are you sure you would like to dismiss all selected alerts?	Apr 09 Apr	threshold. Open the asset details by clicking on asset name below and check the latest backup attempts. 13 hours ago
Replica Restore	Cancel Confirm		13 hours ago Asset Windows10 (199)

4 Click the BackupIQ icon to close the alerts list.



#### To set up email notification for alerts

Unresolved alerts display in the BackupIQ alerts list. If you have integrated with a PSA system (BMS, Vorex, Autotask, or ConnectWise), a ticket is also generated in your PSA. Additionally, you may opt to receive email notifications for these



alerts. Use these steps to set up email notification:

1 Click 🙆:

	Protect Job	Organizations	Click here	-@ 😕	🥐 🔵 db	nitre	к
Dashboard			Scope All	~	Organization All	~ E	

- 2 On the Settings page, select the **Alerts** view.
- 3 Scroll down to Email Settings. Enter the email address and click Add Email. Repeat to add another address.

UNIVIEW Dashboard Protect Jobs Organizations	🔞 💆 🥐 🔵 dt 🛶 nitre 📧
Settings	Í
Alerts Integrations Users Scopes API Access	
Alert Categories	
Password changed	
Reboot required	
Replica failures	
Ransomware	
Email Settings Scroll down to Email Settings	
Alerts generated by our system will be sent to the following addresses:	
demini an brance sil.com	
Email 3 Enter email address	
pd€ i= i= @unitrends.com	<u> </u>

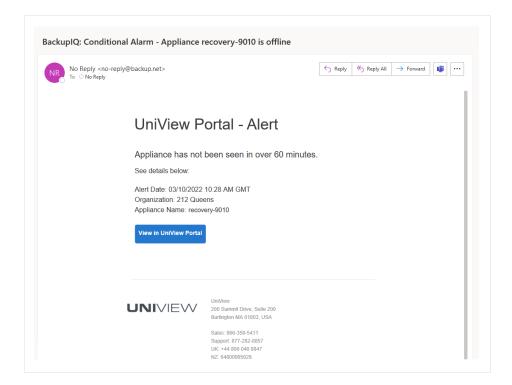
Upon adding one or more email addresses, alerts are emailed to the specified addresses.

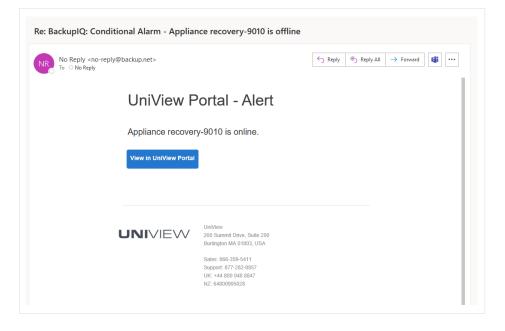
Once the alert condition has been resolved, UniView Portal automatically removes the alert from BackuplQ and emails notification that the alert has been dismissed.

Sample offline and online email alerts:



Release 2.50 | April 2024







## **Conditional alarms**

Use this feature to set a threshold for how long a machine can go without a good backup or good hot backup copy. If the threshold is exceeded, an alarm is generated and added to the Alerts list in BackupIQ.

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. (See "To view BackupIQ alerts" to view these alarms). BackupIQ conditional alarms also generate tickets for Autotask, ConnectWise Manage, BMS, and Vorex integrations. For an overview of the conditional alarms feature, watch the Unitrends - Conditional Alarms video.

You can also opt to receive email notifications for these alarms. To receive email notifications, run the "To set up email notification for alerts" procedure.

If you use Kaseya VSA 9, you can opt to add conditional alarms to your VSA (so you can view them along with your other VSA notifications) and set up VSA email alerts for these conditional alarms:

- After you've done the "To configure conditional alarms" procedure, see "To display conditional alarms in the Kaseya VSA 9 Remote Monitoring and Management Solution" to add these alarms to your VSA and "To add VSA 9 email alerts for conditional alarms".
- To manage VSA email alerts for conditional alarms, see "To view or edit VSA 9 email alerts for conditional alarms" or "To remove VSA 9 email alerts from conditional alarms".

Note: Alerts and conditional alarms are not yet supported for VSA 10 environments.

## Working with conditional alarms

Use these procedures to configure and manage conditional alarms:

- "To configure conditional alarms"
- "To view or modify conditional alarm settings"
- "To delete a custom threshold"
- "To display conditional alarms in the Kaseya VSA 9 Remote Monitoring and Management Solution"
- "To add VSA 9 email alerts for conditional alarms"
- "To view or edit VSA 9 email alerts for conditional alarms"
- "To remove VSA 9 email alerts from conditional alarms"

#### To configure conditional alarms

Use this procedure to set alert thresholds against the last good backup and last good hot backup copy (formerly known as *replicated backup*). A good backup or hot backup copy is one that finished with status *success* or *warning*. When a threshold is crossed, an alert is added to BackupIQ, enabling you to quickly prioritize and address alarm conditions:

#### Notes:

• You must be logged in to UniView Portal as a superuser to create or modify conditional alarms.



- You can also send conditional alarms to your VSA 9 environment. After configuring alarms in the UniView Portal, continue to "To display conditional alarms in the Kaseya VSA 9 Remote Monitoring and Management Solution".
- Global Thresholds (required) Start by setting global thresholds for backups and/or hot backup copies. 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.

Use these steps to configure conditional alarms:

- 1 Click the BackuplQ icon in the upper-right corner.
- 2 Click the 🕸 icon.

UNI		ashboard Pro	tect Jobs Organizations				© 🚆	dbar 😰 💧 🖈
						$\nabla$	Notifications	1 Clear all
Dashb	oard				2	-@	One of the backup thre assets.	Click the BackupIQ icon
	opliances	3 offline	▲ Alerts	30	S Low Space Appliances	?	8 grouped. 15 hours ago	~
							Appliance Organization	LHR2-604-800-50000 🖸 Mississippi Sax
					(			

3 Click C to view global threshold settings for backups (Backups toggle) and hot backup copies (Replication Offsite toggle).

UNIVIEW	Dashboard Protect Jobs Organizatio	ons		© 🚆 🤃	🔵 db 📃 nitre 📧
		$\nabla$	×	Notifications	Clear all
Dashboard		<ul> <li>Global Thresholds</li> <li>O</li> </ul>		One of the backup thresholds ex assets.	cceeded for one or more
a Appliances	Click to view global threshold settings for backups	Backups		8 grouped. 17 hours ago	~
	Click to view	Replication Offsite		Appliance Organization	LHR2-604-800-50000 🖸 Mississippi Sax
Active Jobs	bal threshold settings for hot backup copies		Save	One of the backup thresholds ex assets.	cceeded for one or more

4 (Required) Enter global threshold settings and click Save.

In this 4-hour example, a backup alarm is generated if a good backup does not complete within 4 hours of the job's scheduled start time. A hot backup copy alarm is generated if a good backup is not copied within 4 hours of the backup job's end time.



NIVIEW	Dashboard Pro	otect Jobs	Organizations		© 🥊	dbaaranti@unitre
			V	×	Notifications	Clear all
ashboard			<b>©</b>	Global Thresholds	One of the backup thre assets.	esholds exceeded for one or more
Appliances	3 offline	▲ Alerts	0	Backups	86 grouped. an hour ago	、 、
-				Time without successful backup Days Hours	Appliance Organization	Reg sion-944S 🖸 King Bee
Active Jobs				0 4	One of the backup thre assets.	esholds exceeded for one or more
Job Name	Appliance	Assets	Progress	Replication Offsite	Enter global threshold settings	
Replica Restore	recovery-8120s- 50017	3		Time without successful replication Days Hours	Appliance Organization	LHR2-60 Mississippi Sax
Backup image	recovery-8120s- 50017	2		0 4	Backup was not comp Jan 26, 09:18 am	leted.
				2 Save	Organization	ABLE Manufacturing West Coast

**5** (Optional) Add a custom threshold and apply to organizations:

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

• Click Create New:

ations		ල 🜻	🧭 🔵 db <b>ara a</b> itre 🛚	٢
$\nabla$	×	Notifications	Clear all	
ଡ	Global Thresholds	One of the backup threshold assets.	ds exceeded for one or more	-
?	Backups	86 grouped. an hour ago	~	
	Time without successful backup	Appliance Organization	Reg.⊂∎sion-944S 🖸 King Bee	
	Days   Hours     0   4		ds exceeded for one or more	l
	Replication Offsite	9 grouped.	~	
rogres	Time without successful replication Days Hours	Jan 27, 12:13 am Appliance Organization	LHR2-6 00 🖸 Mississippi Sax	
	0 4	Backup was not completed.	×	
	Save	Jan 26, 09:18 am		
		Organization Domain	ABLE Manufacturing West Coast FAILED2	
	Custom Thresholds	Module	Microsoft 365	
	Click here	Platform	Spanning	

• Enter a title and threshold settings. Add one or more organizations. Click **Save**:



ations				© 🤨	🕴 🧑 🔵 di <b>mmi ji</b> nnitre 🖪	ĸ
$\nabla$	← Back		×	Notifications	Clear all	
Ø	Custom Thresholds			One of the backup thre assets.	sholds exceeded for one or more	*
0	Title	Enter a title		86 grouped. an hour ago	~	
	Backups			Appliance Organization	Reon-944S 🖸 King Bee	
_	Time without successf		- 1	One of the backup thre assets.	sholds exceeded for one or more	
	Days	Hours	- 1	9 grouped. Jan 27, 12:13 am	~	
rogres	Replication Off	site	2	Appliance Enter	LHR2-60, 000 00 00 00 00 00 00 00 00 00 00 00	
	Time without successf	ul replication	19	threshold settings	latad v	
	Days	Hours 0		Backup was not compl Jan 26, 09:18 am	eted. ×	
				Organization	ABLE Manufacturing West Coast	
				Domain Module	FAILED2 Microsoft 365	
	Q Search		A	Platform	Spanning	
	Organization ≑	Threshold 🗢		Backup was not compl	eted.	
	212 Bronx Child	Add		Jan 26, 09:18 am		
	Block, Bradtke and Ka sulke	S Add		Organization Domain	Account1 FAILED3	
	Blue Light, Co.	Add		Module	Microsoft 365	
	Plus Sky Croup	66 A	•	Platform	Spann	D
ту		4 Save		Backup was not compl	leted.	•

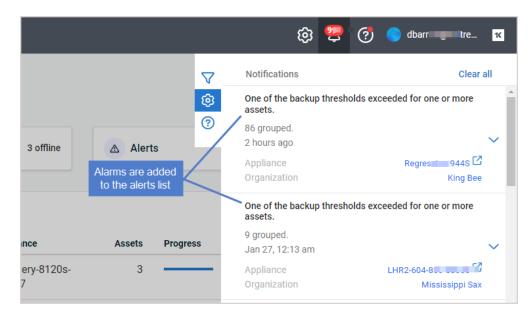
• The custom threshold is added:



s Orga	anizations	
7		×
(¢)	Global Thresholds	
?	Backups	
	Time without succe	ssful backup
	days	hours
	0	4
	Replication Offsite	
Progre	Time without succes	ssful replication
	days	hours
	0	4
		Save
	Custom Thresholds	
		+ Create New
	1 day 1 Organizations	Custom threshold is added

When alarms are generated, they are added to the alerts list in BackuplQ, as shown here:





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

Alarm details in BackupIQ Alerts list:

	😥 😍 🧭 🔵 db <b>arant</b> junitre
▽	Notifications Clear a
©	One of the backup thresholds exceeded for one or more assets. 3 grouped. Jan 19, 04:28 pm
S Low Space Appliances	Appliance recovery-8120s-5( 7 Organization Recovery Series Team
Completed Jobs	Backup was not completed within 1 hour(s) threshold.
795	Open the asset details by clicking on asset name below and check the latest backup attempts. ④ Jan 19, 04:28 pm
pot cause / next steps display 2	Asset Win-32
530	Backup was not completed within 1 hour(s) threshold.
265	Open the asset details by clicking on asset name below and check the latest backup attempts. (1) Jan 19, 04:23 pm
0 Apr 06 Apr 07 Apr 08 Apr 09 Apr 10	Asset Win2019

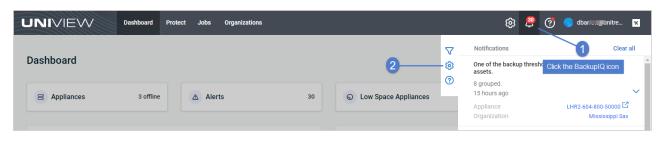
#### To view or modify conditional alarm settings

Use these steps to view or modify conditional alarms:



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

- 1 Click the BackuplQ icon in the upper-right corner.
- 2 Click the 🕸 icon.



3 (Optional) Modify global threshold settings and click **Save**:

s Orgar	nizations		© 😇 ©	🦻 🔵 dbi 👥 itre 📧
7		×	Notifications	Clear all
(¢)	Global Thresholds		Appliance has not been seen	in over 5 minutes.
0			5 hours ago	
U	Backups		Appliance	LHR2-60 000
	Time without eveneed	d beelgap	Organization	Mississippi Sax
	Time without successfu		One of the backup threshold	s exceeded for one or more
	days	hours	assets.	s exceeded for one of more
	0	8	6 grouped.	
	Replication Offsite		6 hours ago	~
	Replication onsite		Modify	VMware-UB-21 17
Progre	Time without successfu	Il replication	1 threshold settings	27 Club
	days	hours	One of the backup threshold	s exceeded for one or more X
	0	8	assets.	
			29 grouped.	
			7 hours ago	$\checkmark$
		2 Save	Appliance	LHR2-604
			Organization	Mississippi Sax

- 4 (Optional) Modify custom threshold settings:
  - Select the custom threshold:



janizations		ල 🜻	🥐 🔵 dba 👘 itre	16
	×	Notifications	Clear a	II
Global Thresholds		Appliance has not been s	een in over 5 minutes.	
		5 hours ago		
Backups		Appliance	LHR2-60 00	
Time without suc	aaaaful baakun	Organization	Mississippi Sax	
days	hours	One of the backup thresh assets.	olds exceeded for one or more	
0	8	6 grouped.		
Replication Offsi		6 hours ago		$\sim$
Replication Offsi	e	Appliance	VMware-UB-21 17	
Time without suc	cessful replication	Organization	27 Club	
days	hours	One of the backup thresh assets.	olds exceeded for one or more	
0	8	29 grouped.		
	0	7 hours ago		$\sim$
	Save	Appliance	LHR2-60-00	
		Organization	Mississippi Sax	
Custom Thresholds	+ Create New	One of the backup thresh assets.	olds exceeded for one or more	
	·	2 grouped.		
1 day	Select the custom	threshold <sup>p 30, 05:01 am</sup>		$\sim$
1 Organizations		Appliance	AppReg3-new	
		Organization	Little Red Rooster	

- Modify the title or threshold settings.
- Add or remove organizations.
- Click Save.

 anizations		4	\$ 😇 (	🥐 db <b>aaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaa</b>
← Back	Modify settings	×	Notifications	Clear al
days	hours		Appliance has not been seen	in over 5 minutes.
			6 hours ago	
1	0		Appliance	LHR2-60 000-00000
Replication Offsi	te		Organization	Mississippi Sax
Time without successfu			One of the backup threshold assets.	s exceeded for one or more
days	hours		6 grouped.	
1	0		6 hours ago	
			Appliance	VMware-UB-21
			Organization	27 Club
Q Search		A .	One of the backup threshold assets.	s exceeded for one or more
Organization 🛧	Threshold		29 grouped.	
212 Bronx	Remove	2	Add or remove organizations	5
27 Club	Remove		Appliance	LHR2-60-1 Jug Juj00
ABLE Manufacturing HQ*	Remove		Organization	Mississippi Sax
212 Bronx 11	Add		On a state a baselour above hald	
Account10	Add	-	One of the backup threshold assets.	s exceeded for one of more
			2 grouped.	
	Delete	Save 3	z groupeu.	



#### To delete a custom threshold

**Note:** You must be logged in to UniView Portal as a superuser to delete a custom threshold.

- 1 Click the BackuplQ icon in the upper-right corner.
- 2 Click the 🕸 icon.

UNIVIEW	Dashboard	Protect Jobs	Organizations			© 🚆 😳	🦻 🔵 dbar 🛄 nitre 🔀
					$\nabla$	Notifications	1 Clear all
Dashboard				2	-@	One of the backup thresho assets.	Click the BackupIQ icon
a Appliances	3 offline	▲ Alert	s 30	S Low Space Appliances	?	8 grouped. 15 hours ago	~
						Appliance Organization	LHR2-604-800-50000 🖸 Mississippi Sax

**3** Select the custom threshold:

ganizat	tions		ŵ 🗧	🧑 🔵 dba 🔤 itre
		×	Notifications	Clear a
G	Global Thresholds		Appliance has not been s	een in over 5 minutes.
			5 hours ago	
	Backups		Appliance	LHR2-60 00
			Organization	Mississippi Sax
	Time without success	ful backup		
	days	hours	One of the backup thresh assets.	olds exceeded for one or more
	0	8	6 grouped.	
			6 hours ago	
	Replication Offsite		Appliance	VMware-UB-21 17
	Time without success	ful replication	Organization	27 Club
	days	hours		
	0	8	assets.	olds exceeded for one or more
	, in the second		29 grouped.	
			7 hours ago	
		Save	Appliance	LHR2-60-00
			Organization	Mississippi Sax
C	Custom Thresholds		One of the backup thresh	olds exceeded for one or more
		+ Create New	assets.	
			2 grouped.	
	1 day	Select the custor	n threshold <sup>o 30, 05:01 am</sup>	
	1 Organizations		Appliance	AppReg3-new
			Organization	Little Red Rooster

- 4 Review the organizations list. Organizations to which this custom threshold has been assigned display at the top of the list. Upon deleting the custom threshold, global thresholds are applied to any associated organizations.
- 5 Click **Delete**, then **Confirm**. The threshold is removed.



Release 2.50 | April 2024

a Orga	anizations			© 🚆	🧑 🔵 db: 💶 itre ҡ
7	← Back		×	Notifications	Clear all
(¢)	Custom Thresholds			Appliance has not beer	n seen in over 5 minutes.
0	Title			5 hours ago	
•	1 day			Appliance Organization	LHR2-604 nnn nnnn Mississippi Sax
	Backups		- 1	One of the backup thre assets.	sholds exceeded for one or more
	Time without success	ful backup		6 grouped. 5 hours ado	~
Progre	Plea	ase Confirm			×
	Time witho Are yo	ou sure you want to	o delete the threshold	1 day?	3
				One of the backup thre	Cancel Confirm
	Q Search		<u> </u>	assets.	
	Organization 🛧	Threshold		2 grouped. Sep 30, 05:01 am	$\sim$
	212 Bronx	Remove	View list of organiz	ations to which the	AppReg bw
	2	Remove	threshold i	s assigned	Little Red Rooster
	ABturing H	IQ* Remove		One of the booling three	
	212 Bronx 11	Add		one of the backup thre assets.	sholds exceeded for one or more
	Account10	Add	•	2 grouped. Sep 30, 01:51 am	~
	2	Delete	Save	Appliance	vmware-ub-21 36

# To display conditional alarms in the Kaseya VSA 9 Remote Monitoring and Management Solution

Conditional alarms can be configured to display as system alerts in your VSA 9 environment:

V	SA 🤍	Search fo	r machines				What's New (	ð 🗅	👷 🛃 🖲 3 🌑 4	•	🚰 ? 🕘 ory itrends.com	-
<	Q Search Navigation	n	UNIVIEW	Dashboard	Protect Jobs	Organizatio	ns				Alerts • Messages System	•
υv	UniView	-									2/19/2021, 7:26:05 AM	a
	Portal	-	Dashboard								Unitrends backup: alarm threshold exceeded for	
	Dashboard										The backup for on was not created for the last 1	
Q	Agent	•									hour(s). Appliance is offline. Backups have not been running as a result. Open appliance details	
20	Agent Procedures	•	Appliances	8	Alerts				Low Space Appliances		page and check that the appliance is powered on and connected to the network. If the problem	
1	Anti-Malware		4 offline		131				2		persists, please open a support case. Go to the Unitrends Backup module to check the backups.	
200	Anomanware					Conditi	onal alarms	dis	olav		Onitional backup mouse to check the backups.	
63	Antivirus	•					VSA Alerts				<ul> <li>2/19/2021, 7:26:05 AM</li> </ul>	à
Q	Audit	->	Active Jobs				vor monto	iii St	Completed Jobs		Unitrends backup: alarm threshold exceeded for oryabinina	
	AuthAnvil	,	Active cobo						completed tobo		exceeded for oryabinina The backup for testNas-NAS-RRC on recovery-	
ŝ	Backup		Job Name	Appliance	Assets	Progress	Duration		273		9120s was not created for the last 1 hour(s). Backups have been failing. Open the asset detail	
-5			Job Hame	Appliance	Assets	riogress	Duration				to check last 6 backups. Go to the Unitrends Backup module to check the backups.	
Ð	Cloud Backup	•	Backup Job	recovery-8032s	1	_	01:10:14		182		backup module to check the backups.	
សិ	Data Backup	•									• 2/19/2021, 7:26:04 AM	à.
Ð	Datto BCDR	•	Backup Copy	Regression-944S	3		00:00:06		91		Unitrends backup: alarm threshold exceeded for oryabinina	
de	Discovery	,	Backup Copy	LHR2-604-800-50000	1		-				Exceeded for oryabinina The backup for windows-32_DS on recovery-	
-		,							0		8002-50000 was not created for the last 1 hour(s	
	Info Center								Dec 28 Dec 29 Dec 30	Dec 31 Jan	Asset is ether not in any active jobs or the jobs are	e

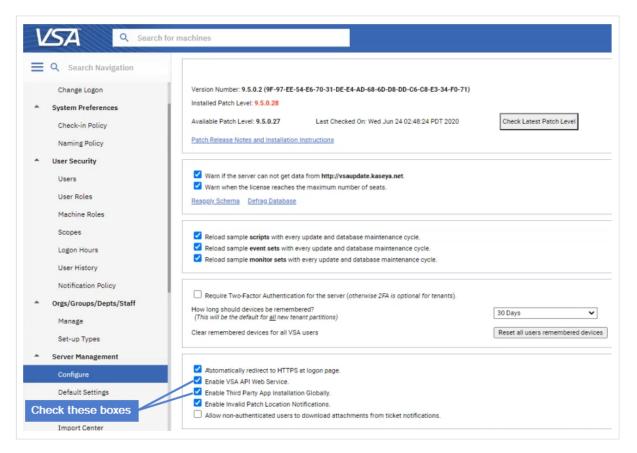


#### To add conditional alarms to your VSA 9 environment

- **1** Ensure that these requirements have been met:
  - Conditional alarms have been configured in the UniView Portal (as described in "Conditional alarms").
  - VSA 9 is running release 9.5.0.28 or higher.

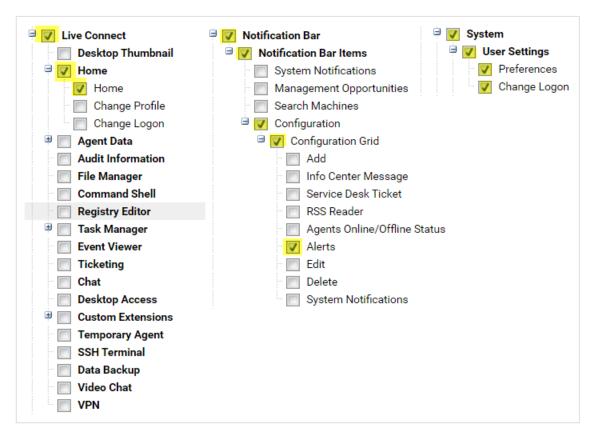
Note: Alerts and conditional alarms are not yet supported for VSA 10 environments.

- VSA is accessible on the Internet. If you have an on-premise VSA instance that does not have Internet access, UniView Portal cannot send conditional alarms to the VSA.
- These options are enabled in the VSA: Enable VSA API Web Service and Enable Third Party App Installation Globally. These options are located on the **System > Server Management > Configure** page:



 The roles and scopes shown below are enabled. Enable these on the VSA System > User Security > User Roles page.





2 Add the VSA integration as described in "Integrating VSA 9".

#### Notes:

- If you have already integrated an older VSA version, you must remove this integration, then add a new one
  using the latest TAP module. The "Integrating VSA 9" procedure includes steps to remove the existing
  integration.
- If the logos and branding you see in your currently deployed VSA module do not look like this new UniView module, you may be using a prior version of the TAP module for the Unitrends Backup Portal platform. As of January 2023, module branding has been modified, but no other functional changes exist. We do not recommend customers uninstall the older module to use the newer module as this will impact existing mappings (e.g., UniView user accounts mapped to KaseyaOne accounts for single sign-on, and assets mapped to VSA IDs).
- 3 Enable VSA alerts in the UniView Portal:
  - In the UniView Portal, click 20:

UNIVIEW	Dashboard	Protect	Jobs	Organizations	Click here	¢	2	🦻 🔵 d	b ji	tre 11
Dashboard					Scope		~	Organization All	~	23



- Select the Integrations view.
- Locate the VSA integration and click **Show Configuration**.
- Click the toggles to enable alerts for backups (Backups toggle) and hot backup copies (Replication Offsite toggle).

5	IS					
Alerts	Integration	S Users Scopes API	Access			
VSA	VSA Kaseya	Kaseya VSA integration is complete. You co Configuration to setup conditional alerts sy The portal is integrated with https://utmop/	nchronization.			d Manifest Enabled
		0	- 🗸 ѕноw со	NFIGURATION		
VSA I	Integration Settin	qs		VSA Alert Settings		>
	Alerts	2-	-0	Backups		+ New
	Deeluure			Triggers	VSA Actions	
	Backups		3	Conditional Alarms	Alert (default) Email ×	
	Replication Off	site		Replication Offsite		+ New
Q	VSA Agent Ma	pping Authorization		Triggers	VSA Actions	
Q	VSA Agent Ma	oping Errors		Conditional Alarms	Alert (default)	
Ba		pping Long Runs connected to your VSA <b>Alerts</b> (Default).		VSA Agent Mapping Authoriz	ation	+ New
	it to also trigger VSA			Triggers	VSA Actions	
	it to alloo trigger vor					

- 4 To finish the configuration, log in to the VSA and launch the UniView module.
  - **Note:** If prompted, enter your UniView Portal credentials and click **Log in**. Click **Allow** to grant UniView Portal access to the VSA instance.

L	<b>/SA</b> •	Search f	or machines					⊕ <b>Ľ</b>	👷 <table-cell-rows> 🖶 a 🔵 a</table-cell-rows>	<b>4</b> 9	<b>e</b> da <b>rra</b> in	bv@
<	Q. Search Navigation	n	UNIVIEW	Dashboard	Protect	Jobs	Organizations					Ę
υv	UniView	-	Click here		- e							
	Portal	*									Scope	
	Dashboard		Dashboard								All	
Q	Agent	•										
0	Agent Procedures	•	Applianaes		Alerts				Lew Cross Appliances			
÷	Anti-Malware	,	Appliances	8					Low Space Appliances		$\odot$	
٩	Antivirus	•	5 offline		139				2			



# To add VSA 9 email alerts for conditional alarms

Use this procedure to configure VSA email alerts for conditional alarms.

**Note:** Alerts and conditional alarms are not yet supported for VSA 10 environments.

- 1 Ensure that these prerequisites have been met:
  - Conditional alarms have been configured, as described in "To configure conditional alarms".
  - Conditional alarms have been added to the VSA, as described in "To display conditional alarms in the Kaseya VSA 9 Remote Monitoring and Management Solution".
  - (On-premise VSA instance only) An SMTP server has been configured on the VSA System > Server Management > Outbound Email page. To configure an SMTP server, click Edit, enter settings, then click Save. Outbound Email fields include:
    - Host Name The name of the host email server. Example: *smtp.mycompany.com*. If no authentication or special port number is required, then only specify values for the **Default Days to Keep Logs** and **Default Sender Email** fields.
      - **Note:** Enter **localhost** in the Host Name field to use the Kaseya Server's IIS Default SMTP Virtual Server to route outbound email. The Default SMTP Virtual Server service must be installed and running in order to send email. The service must also be able to resolve DNS addresses to route email to other SMTP servers.
    - Port Typically 25, but the host email server may require a different port number. Ports 465 and 587 are typically used for connecting to an SMTP email server over SSL/TLS.
    - User Name If required for authentication, enter the username of an account authorized to use the host email server.
    - Password If required for authentication, enter the password of the account.
    - Default Days to Keep Logs Enter the number of days to keep log outbound email entries.
    - Default Sender Email Enter the default From address displayed by outbound email.



E Q email	General	Log	Edit ? 🗆 🗙
Q email	🖻 Edit 📿 Test 🔽	Enable	
System	Email Gateway		Edit Outbound Email
Server Management	Host Name:	smtp.se	
Outbound Email	Port:	587	Email Gateway
Outbound Email	User Name:	Hill_md	Host Name*: smto.semiliiid.net
Service Billing	Default Days to		
Administration	Keep Logs:	30	Port: 587
	Retry Count:	5	User Name: Killing Define gateway
Bulk Email Management	Retry Interval (in		Password: and sender ema
Service Desk	minutes):	15	Require SSL?:
Common Configuration			Default Days to Keep Logs*: 30
	Default Sender		Retry Limit: 5
Incoming Email and Alarm Settings	Email:	no-reply@ut	
Ticketing			Retry Interval (in minutes): 15
This setting does not	Status		Default Sender
This setting does not apply to conditional	Automatic Delivery:	Disabled	
alarm email alerts	Pending:	22	Email*: no-reply@utr
	Sent:	822	
	Failed Last Hour:	0	
	Failed Last Day:	0	
	Failed Last Week:	-	3 Save Cancel

2 In the UniView Portal, click 🔯:

	Protect	Jobs	Organizations	Click here	-@ 🧶	🦻 🔵 d	b _ itre	e <mark>1K</mark>
Dashboard				Scope All	~	Organization All	~	C3

- **3** Select the **Integrations** view.
- 4 Locate the VSA integration and click **Show Configuration**.
- 5 Click  $\swarrow$  to edit VSA integration settings.
- 6 Click New + in the Backups area to configure email alerts for backups or click New + in the Replication Offsite area to configure email alerts for hot backup copies.



ettings				
Alerts	Integrations	Users Scopes API Acc	ess	
	<b>VSA</b> Kaseya	Kaseya VSA integration is complete. You can non Configuration to setup conditional alerts synchro The portal is integrated with https://dxmp.076-v	nization. sa kaseya.net	es > VSA. Click on Show Download Manifest Enabled
VSA Int	tegration Settings	<b>0</b> —~s	HOW CONFIGURATION	×
		<b></b>	Backups	+ New
	ens		Triggers	VSA Actions
	Backups		Conditional Alarms	Alert (default)
	Replication Offsite		Replication Offsite	Click to configure email alerts for Backups or Replication Offsite
	VSA Agent Mapping	g Authorization	Triggers	VSA Actions
	VSA Agent Mapping	g Errors	Conditional Alarms	Alert (default)
	VSA Agent Mapping	g Long Runs	VSA Agent Mapping Authoriza	ation + New
Backu	p Alarms will be conr	nected to your VSA <b>Alerts</b> (Default).		
Edit to	also trigger VSA Em	ail.	Triggers	VSA Actions Alert (default)
			Conditional Alarms	Aiert (derault)

- 7 In the Create New VSA Action dialog, select **Email** from the VSA Action list.
- 8 Enter one or more recipient email addresses.
  - You can enter addresses by typing or by using copy/paste keyboard shortcuts (Ctrl+C and Ctrlt+V).
  - If entering multiple addresses, you must enter a comma or space between each address.
- 9 Click Confirm.



Backups: Create New VSA Action	×
Select an action to configure. VSA Action Email Recipient	~
dba in the induced and the ind	Back Confirm

- **10** The email alert is added.
  - **Note:** VSA Actions are user specific. The email alert that you added displays for your user account only. If another user logs in to the UniView Portal, the VSA Actions that were added by your user account do not display. Because of this, it is possible that another user may create a duplicate VSA action.



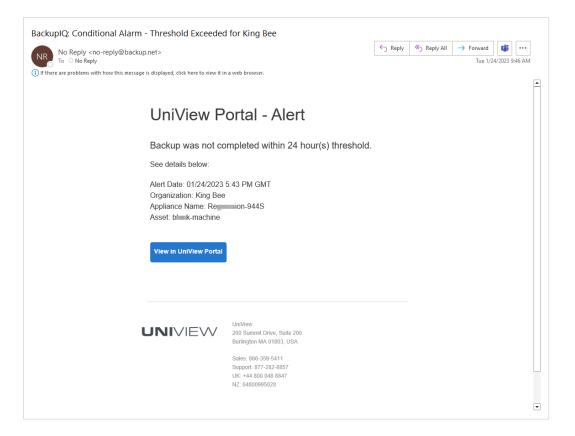
VSA Alert Settings				$\times$
Backups			+ New	
Triggers		VSA Actions		
Conditional Alarms	Alert (default)	Email ×-	Email alert is added	
Replication Offsite			+ New	
Triggers		VSA Actions		
Conditional Alarms	Alert (default)			
VSA Agent Mapping Authorizatio	n		+ New	
Triggers		VSA Actions		
Conditional Alarms	Alert (default)			
VSA Agent Mapping Errors			+ New	
Triggers		VSA Actions		
Conditional Alarma	Alast (dafault)		Click to exit	
			Cancel Done	

**11** (Optional) Repeat this procedure from step 6 to add email alerts to the other job type.

### 12 Click Done to exit.

An email alert is sent if the conditional alarm threshold is reached. Sample conditional alarm email alert:





To view or edit VSA 9 email alerts for conditional alarms

1 In the UniView Portal, click 🕺:

	d Protect	Jobs	Organizations	Click here	-@ 📜	?	odb 👘	hitre <mark>14</mark>
Dashboard				Scope	~	Organ All	nization	£3

- 2 Select the **Integrations** view.
- 3 Locate the VSA integration and click **Show Configuration**.
- 4 Click ∠ to view or edit VSA integration settings.



ettings			
Alerts	Integrations Users	s Scopes API Access	
T	IT Complete <sub>Kaseya</sub>	Configure the integration with Kaseya One portal to enable the option to login using IT Complete credentials.	Integrate
VSA	VSA Kaseya	Kaseya VSA integration is complete. You can now view your Kaseya agents under Appliances > VSA. Click on Show Configuration to setup conditional alerts synchronization. The portal is integrated with https:// TG-vsa/kaseya.net	load Manifest Enabled
		SHOW CONFIGURATION	
VSA Int	egration Settings		
<b>珍 A</b>	lerts	2∠	
C	Backups		
	Replication Offsite		
	VSA Agent Mapping Authoriz	zation	
	VSA Agent Mapping Errors		
	VSA Agent Mapping Long Ru	uns your VSA <b>Alerts</b> (Default).	

- 5 Click **Email** to view or edit the VSA action.
- 6 (Optional) Add or remove recipient email addresses, then click **Confirm**. Click **Done** to exit.
  - You can enter addresses by typing or by using copy/paste keyboard shortcuts (Ctrl+C and Ctrlt+V).
  - If entering multiple addresses, you must enter a comma or space between each address.
  - To delete an email address, click its X.



Backups	+ New
Triggers	VSA Actions
Conditional Alarms	Alert (default) Email ×
Replication Offsite	Backups: Configure VSA Action
Triggers	
Conditional Alarm	Select an action to configure.
VSA Agent Mapping	VSA Action         Add or delete recipient addresses           Email         ~
Triggers	Recipient       db:     trends.com ×
Conditional Alarm	
VSA Agent Mapping	Click X to delete
Triggers	
Conditional Alarms	Alert (default)
VSA Agent Mapping Lo	ong Runs + New

# To remove VSA 9 email alerts from conditional alarms

1 In the UniView Portal, click 🔯:

	Protect Jobs	Organizations	Click here {	ම 🤨	🤊 🔵	db <b>arre</b> nitre	. <del>K</del>
Dashboard			Scope All	~	Organization All		:3

- 2 Select the **Integrations** view.
- **3** Locate the VSA integration and click **Show Configuration**.



Alerts	Integrations User	rs Scopes API Access
ſŢ	IT Complete <sub>Kaseya</sub>	Configure the Integration with Kaseya One portal to enable the option to login using IT Complete credentials.
VSA	VSA Kaseya	Kaseya VSA Integration is complete. You can now view your Kaseya agents under Appliances > VSA. Click on Show Configuration to setup conditional alerts synchronization. The portal is integrated with https://TG-vsazkaseya.net Enabled
VSA Int	tegration Settings	
🏟 A	lerts	2∠
	Destaurs	
	Backups	
	Replication Offsite	
	<ul> <li>Replication Offsite</li> <li>VSA Agent Mapping Authori</li> </ul>	ization
	<ul> <li>Replication Offsite</li> <li>VSA Agent Mapping Authori</li> <li>VSA Agent Mapping Errors</li> </ul>	
	<ul> <li>Replication Offsite</li> <li>VSA Agent Mapping Authori</li> </ul>	uns

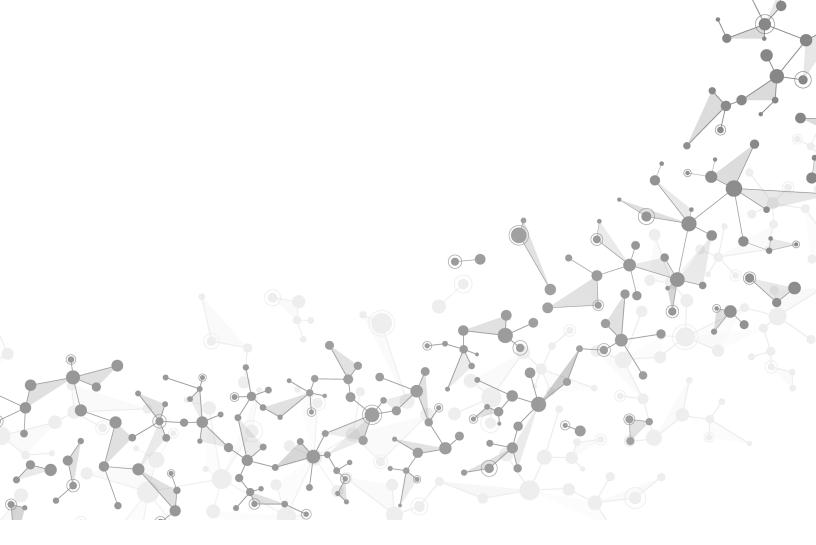
5 Locate the Email conditional alarm in the Backups area or the Email conditional alarm in the Replication Offsite area for hot backup copies. Click its **X** to remove the email alert. Click **Done** to exit.



Backups	+ New
Triggers	VSA Actions
Conditional Alarms	Alert (default) Email ×
<ul> <li>Replication Offsite</li> </ul>	Click an X to remove email all from Backups or Replication O
Triggers	VSA Actions (for hot backup copies)
Conditional Alarms	Alert (default) Email ×
VSA Agent Mapping Authorization	n + New
Triggers	VSA Actions
Triggers Conditional Alarms	VSA Actions Alert (default)
Conditional Alarms	Alert (default)
Conditional Alarms	Alert (default) + New



This page is intentionally left blank.





# Working with Unitrends Appliances, Assets, and Backups

Use the Protect page to manage your Unitrends appliances, assets, and backups. To access the Protect page, click **Protect:** 

	Protect Jobs Org	janizations 🔞 📮	?	odbi unitre ҡ
Protect	Click he	are		+ Add Customer

The page contains these Unitrends views:

- Appliances (default view) Use to:
  - View summary and status information by Unitrends appliance
  - Add appliances to the UniView Portal
  - Connect to appliances from the UniView Portal
  - Add assets to an appliance
  - Remove assets from an appliance
- Assets Use to:
  - View status information about the assets protected by your Unitrends appliances
  - Remove assets from appliances
  - Manage backup policies for Windows image-level assets and VMware virtual machines

See these topics for details:

- "Working with appliances"
- "Viewing assets"
- "Removing assets" on page 132
- "Working with backup policies"

# Working with appliances

Use the Appliances view to manage, add, and connect to appliances. See these procedures for details:

- "Viewing appliances"
- "Filtering the Appliances view"
- "Viewing appliance details"



- "Adding assets to an appliance"
- "Removing assets from an appliance" on page 111
- "Blocking or unblocking local access to an appliance"
- "Connecting to an appliance"
- "Modifying Helix Auto Update settings"
- "Adding an appliance"
- "Deleting an appliance"

### Viewing appliances

The Appliances view displays all Unitrends appliances that have been added to your backup.net instance. (To filter the display, see "Filtering the Appliances view".)

The following information is given for each appliance:

**Note:** Appliance information is updated hourly.

- + New Click to add an appliance. For details, see "Adding an appliance".
- Filters Enter criteria in these fields to filter the list of appliances that display. For details, see "Filtering the Appliances view".
- Select checkbox Check boxes to modify selected appliance's Helix settings. For details, see "Modifying Helix Auto Update settings".
- Alerts icon Indicates whether the appliance has unresolved alerts: green for no alerts, yellow for warnings, red for critical.
- Lock icon Indicates whether local access to the appliance has been blocked: for blocked, for unblocked.
   Once local access has been blocked, users can no longer log in directly to the appliance UI. Instead, users must connect to the appliance from UniView (as described in "Connecting to an appliance"). For more on this feature, see "Blocking or unblocking local access to an appliance".
- Name and asset tag The appliance name and asset tag.
- Manage Click to connect to the appliance. (The Manage button does not display for offline appliances.) For appliance procedures, see the Administrator Guide for Recovery Series and Unitrends Backup.
- Last Seen Indicates whether the appliance is online or offline. *Just Now* indicates the appliance is online. If the appliance is offline, shows the number of hours, days, months, or years since the appliance was last seen.
- Model Appliance model. VM for Unitrends Backup virtual appliances. Model number for Unitrends physical appliances.
- Organization Appliance's organization.
- Free Space Shows the amount of free space on the appliance, in terabytes (TB) or gigabytes (GB), and as a
  percent of total space.



- Alerts Number of unresolved alerts on the appliance. To address alerts, see "Working with Alerts and Conditional Alarms".
- Helix Status Indicates whether the following have been enabled on the appliance: Helix and Helix auto updates. *On* for enabled, *Off* for disabled, or *!* for Helix status unavailable.
- Version Unitrends version running on the appliance.

If the appliance is not running the latest release, the version number displays in yellow indicating that an update is available. Click **Manage** to log in to the appliance and install the latest Unitrends software version.

- Protected Assets Click to view protected assets (assets that are protected by a backup schedule). Click a row in the Protected Assets table to view asset details. Click **Protected Assets** again to hide the protected assets list.
- Add Asset Click to add an asset to the appliance. For details, see "Adding assets to an appliance".
- View Unprotected Assets Click to see any assets that have been added to the appliance but are not protected by an enabled backup schedule. In the Unprotected Assets dialog, you can:
  - Quickly view and apply backup policies to Windows image-level assets and VMware VMs.
  - Remove selected assets from the appliance. For details, see "Removing assets from an appliance".



	EW	Dashboard Protect	Jobs Organizations					dbi
otect							Click to add an applia	
<b>ດ</b> ້ Spanni	ing Licenses	0						
ssigned	128	99						
emaining	-128	🗖 -99		Filters				
urchased	10	0						
Appliances	Assets	Microsoft 365	Google Workspace	Salesforce	Microsoft Azure			
Scope		Organization	Status	Order By	Appliance Name		_	
All			All		✓ PM		Q Available s	pace 30 % or less
s icon		Ap	opliance name					
·			lanage 🖸 LAST SEEN JUST NOW	VIRTUAL	ORGANIZATION	FREE SPACE 96.2 GB / 199.9 GB	ALERTS HELIX STAT	US VERSION 10.8.1
	52 FD2 E	7 Appliance a		lick to connect to app		48.14% FREE	AUTO UPDA	
Type All	Protected A	View asse	Enter Asset Name	Protected assets of	display	Add an asset	Add Asset View Unprote	ected Assets 23
Type	ected   $\ominus$	View asse	Enter Asset Name					٩
Type		View asse		Protected assets of	Recent Backups ① ≎	Last Backup Copy ÷	Recent Backup Copies ()	٩
Type All 0 select	ected   $\ominus$	View asse	Enter Asset Name					٩
Type All 0 selec	toted   ⊙ Type≑	View asse View asse	Enter Asset Name	Last Backup 🔶	Recent Backups o∂ ≎ FSSMTWT	Last Backup Copy ∋	Recent Backup Copies ③	Q Last Certified =
Type All 0 selec	rcted   ⊝ Type≎ ∰	View asse View asse	Last Full + 60.3 GB	Last Backup ≑ 24 minutes ago	Recent Backups ⊕ ≎ F S S M T W T F S S M T W T	Last Backup Copy ⇒ an hour ago	Recent Backup Copies () F S S M T W T F S S M T W T	Q Last Certified ÷
Type All O select	rcted   Type ¢ to ware VM Instar	View asse View asse Remove Name ÷ Windows10_22:00ks Windows10(10) a	Last Full = 60.3 GB Dick to view sset details 21.9 GB	Last Backup ≎ 24 minutes ago 28 minutes ago	Recent Backups () = FSSMTWT FSSMTWT FSSMTWT FSSMTWT	Last Backup Copy ⇒ an hour ago an hour ago	Recent Backup Copies ③ FSSMTWT FSSMTWT FSSMTWT	Q Last Certified ÷
Type All o select	rcted   Type = to ware-VM Instar	View asse View asse Remove Name = Windows10_22diuks trindows10 (1 )	Last Full = 60.3 GB Sick to view sset details 21.9 GB	Last Backup ÷ 24 minutes ago 28 minutes ago 31 minutes ago	Recent Backups ① ÷           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T	Last Backup Copy o an hour ago an hour ago 2 hours ago	Recent Backup Copies ③ F S S M T W T F S S M T W T F S S M T W T F S S M T W T	Q Last Certified = 2 hours ago
Type All O select VM	rcted   Type ÷ to ware-VM Instant to to to to to to to to to t	View asset View asset View asset Vindows10_22utuks Vindows10_22utuks Compared to the compared of the compared	Last Full = 60.3 GB 2ick to view sset details 21.9 GB 21.9 GB	Last Backup ≎ 24 minutes ago 28 minutes ago 31 minutes ago 31 minutes ago	Recent Backups @:           F S S M T W T           S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T	Last Backup Copy > an hour ago an hour ago 2 hours ago 2 hours ago 2 hours ago 2 hours ago	Recent Backup Copies ③ F S S M T W T F S S M T W T	Q Last Certified = 2 hours ago
Type All O seles VM	cted I ○ Type ≎ tt ware VM Instan	View asset View asset Vindows10_22.00.ks Windows10(1)) a DS-SQLCLAD-1 7 Iover to view asset type desc SQL2012 -176	Last Full = 60.3 GB 21.9 GB 25.3 GB	Last Backup ÷ 24 minutes ago 28 minutes ago 31 minutes ago 31 minutes ago 31 minutes ago	Recent Backups ① ÷           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           Backups:	Last Backup Copy = an hour ago an hour ago 2 hours ago	Recent Backup Copies () F S S M T W T F S M	Q Last Certified = 2 hours ago
Type All o selev v w w	rted I Type = the wave-VM instant the the the the the the the th	View asset Name = Windows10 (1 - ) a DS-SQLCLAD-1 7 Iover to view asset type desc SQL2012 - 176 Win10_EFI - 192	Last Full = 60.3 GB Click to view sset details 21.9 GB 25.3 GB 42.0 GB	Last Backup 24 minutes ago 28 minutes ago 31 minutes ago 31 minutes ago 31 minutes ago 32 minutes ago	Recent Backups @ :           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           B S S M T W T           F S S M T W T           Backup:           Successes           Certification:	Last Backup Copy ⇒ an hour ago an hour ago 2 hours ago	Recent Backup Copies ③ F S S M T W T F S S M T W T	Q Last Certified = 2 hours ago
Type All O select VMM	teted I ○ Type ≎ tt wareVM Instate to to to to to to to to to to to to to	View asse View asse Name = Windows10_22:00.ks Undows10_22:00.ks Compdows10(1-)	Last Full = 60.3 GB 21.9 GB 25.3 GB 42.0 GB 19.0 GB	Last Backup ÷ 24 minutes ago 28 minutes ago 31 minutes ago 31 minutes ago 31 minutes ago 32 minutes ago 33 minutes ago	Recent Backups () *           F S S M T W T           • S S M T W T <td>Last Backup Copy ⇒ an hour ago an hour ago 2 hours ago</td> <td>Recent Backup Copies ()           F S S M T W T</td> <td>Q Last Certified = 2 hours ago</td>	Last Backup Copy ⇒ an hour ago an hour ago 2 hours ago	Recent Backup Copies ()           F S S M T W T	Q Last Certified = 2 hours ago

# Filtering the Appliances view

The Appliances view displays all appliances that have been added to your backup.net instance.

To filter the display, enter filter criteria in any of the following:

- Scope Select a scope from the list. (Select All to clear the scope filter.)
- Organization Select an organization from the list. (Select All to clear the organization filter.)
- Status Select Online or Offline to filter by appliance status. (Select All to clear the status filter.)
- Order By- Select Last Time Seen, Name, Model, Alerts, Free Space, or Version.



- Appliance Name field Enter a text string, then press **Enter** to apply. Appliance names containing the text you entered display.
- Available space 30% or less Filter by amount of free space on the appliance.

JNI		Protect Jobs Org	anizations		\$\$ \$	🗳 🧑 ba	arr e
Prote	ect					Click to add an appliance	e – Nev
ส <sup>7</sup>	Spanning Licenses ()						
Assign	ned 🚺 118   🖻 13						
Remain	ning 🗵 -118   🖻 -13						
Purcha	ased 🚺 0   🚍 0						
App	liances Assets Microsoft	365 Google Work	space Microsoft Azure	Click to enable filter	Enter # to modify	/%	
	Scope Organization	Status	Order By	Appliance Name Enter search text			
	All ~ All	~ All	✓ Free Space ✓	VM	Q 0	Available space 30	) % or less
			Enter filter criteri	a			
_	VMWARE-UB-200     PD     -8813-	wanaye 🗠	IST SEEN VIRTUAL	TI SPACE 303.5 GB / 819	.8 GB 3		VERSION
	9D		APPLIANCE	37.01% FREE		AUTO UPDATES	
						OFF	
	> Protected Assets				Add Asset $\checkmark$	View Unprotected	Assets
	• VMWARE-UB-C 1E-	Manage [] LA	ST SEEN MODEL	ORGANIZATION FREE SPACE	ALERTS	HELIX STATUS	VERSION
	🔒 13E		ST NOW VIRTUAL	T 125.6 GB / 199	.9 GB 0	HELIX OFF	10.7.6
	C6 )8B- 6A-05-2000A		APPLIANCE	62.81% FREE		AUTO UPDATES OFF	
	> Protected Assets				Add Asset 🗸	View Unprotected	Assets

# Viewing appliance details

To view appliance details:

1 In the Appliances view, click the appliance.



roteo	ct								Click to add an appliance	+ Nev
ส' ร	Spanning Licenses 🚯									
Assigned	d 🗓 118   😇 1	3								
Remainir	ing 🚺 -118   🖻 -1	13								
Purchase	ed 🖪 0   🖻 0									
		Microsoft 365	Google Wo	orkspace	Microsoft Azure					
s	Scope Or	Microsoft 365 rganization	Status	orkspace ~	Microsoft Azure Order By Free Space	Appliance Name ub-98		م م	Available space	9 30 % or le
s	Scope Or All VMWARE-UB-98	rganization All ~	Status All		Order By	ub-98	FREE SPACE	Q Q	S HELIX STATUS	VERSION
s	Scope Oi All V	rganization All v	Status All Manage [2]	LAST SEEN JUST NOW	Order By Free Space V	ub-98				VERSION 10.7.10

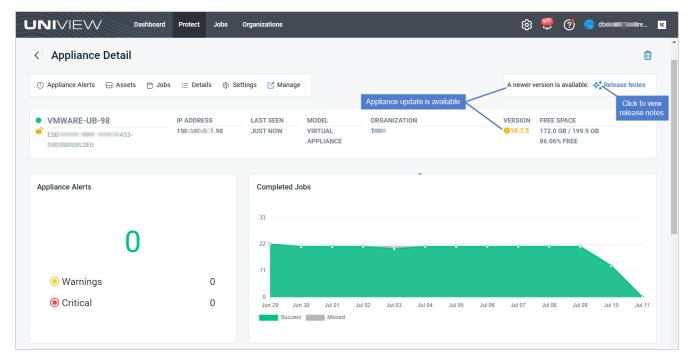
- 2 The following details display for the selected appliance:
  - Alerts icon Indicates whether the appliance has unresolved alerts: green for no alerts, yellow for warnings, red for critical.
  - Lock icon Indicates whether local access to the appliance has been blocked: for blocked, for unblocked. Once local access has been blocked, users can no longer log in directly to the appliance UI.
     Instead, users must connect to the appliance from UniView (as described in "Connecting to an appliance").
     For more on this feature, see "Blocking or unblocking local access to an appliance".
  - Name and asset tag The appliance name and asset tag.
  - IP Address Appliance IP address (or N/A if your environment is not configured to store IP addresses).
  - Last Seen Indicates whether the appliance is online or offline. Just Now indicates the appliance is online. If the appliance is offline, shows the number of hours, days, months, or years since the appliance was last seen.
  - Model Appliance model. VM for Unitrends Backup virtual appliances. Model number for Unitrends physical appliances.
  - Organization Appliance's organization.
  - Version Unitrends version running on the appliance.

If the appliance is not running the latest release, the version number displays in yellow indicating that an update is available. Click **Release Notes** above to see details about the latest release. Click **Manage** to log in to the appliance and install the latest Unitrends software version.

**Note:** If you see the message *Unable to upgrade*, contact Unitrends Support or your Authorized Partner for assistance.



- Free Space Shows the amount of free space on the appliance, in terabytes (TB) or gigabytes (GB), and as a percent of total space.
- Appliance Alerts tile Shows the number of unresolved critical and warning alerts on the appliance.
- Completed Jobs tile Shows the number of successful and missed jobs completed over the last 13 days.
   Hover over a point in the graph to see the number of successful and missed jobs completed that day. Click
   Missed to hide missed jobs. Click Success to hide successful jobs.
- Appliance Alerts Lists unresolved alerts.
- Assets tile Lists the assets protected by the appliance. For each asset, shows the Last Full backup size and the date/times when recent backups and copies were taken.
  - Click Add Asset to add an asset to this appliance (see "Adding assets to an appliance").
  - Click View Unprotected Assets to open the Unprotected Assets dialog where you can apply backup policies to assets or remove assets from the appliance (see "Removing assets from an appliance").
- Jobs Shows active, scheduled, and recent jobs.
- Details Shows appliance storage, backup copy targets, and network settings.
- Manage Click to log in to the appliance (for details see "Connecting to an appliance").
- Settings Click the toggles to block/unblock local access to the appliance or to open/close a support tunnel. For details, see "Blocking or unblocking local access to an appliance" and "Opening or closing a support tunnel".





Туре	/		Enter Asset Name					
All 🧸		~				Click to	iew unprotected assets	Q
Protecte D selecte	ed Assets d ∣ ⊝ R	emove			Clic	ck to add an asset	Add Asset View Unprotected Asse	ts 290
	Type 🗘	Name ≑	Last Full ≑	Last Backup ≑	Recent Backups ④ 🗘	Last Backup Copy 🗦	Recent Backup Copies () Last Certified	÷
	•	1: D7CCC	983.8 GB	5 hours ago	M T W T F S S	5 hours ago	M T W T F S <b>S</b>	
	vm	Windows10 ks	61.2 GB	9 hours ago	M T W T F S S	9 hours ago	M T W T F S S Friday, 10/07/2022	
	vm	Windows10 (	69.7 GB	9 hours ago	M T W T F S <b>S</b>	9 hours ago	UTC-07:00 Backup Copies: Cold Copies Successes 2	
	vm	DS-SQLCLAD-	21.9 GB	9 hours ago	M T W T F S S	9 hours ago	Hover to view job det	ails
	vm	Unitrends_	16.4 GB	10 hours ago	M T W T F S <b>S</b>	10 hours ago	MTWTFSS	
	vm	Win8 1)	54.4 GB	10 hours ago	M T W T F S S	10 hours ago	M T W T F S <b>S</b>	
	vm	SQL2016 Click to	o view asset details	10 hours ago	M T W T F S <b>S</b>	10 hours ago	M T W T F S S	
	vm	Win102	42.0 GB	10 hours ago	M T W T F S <b>S</b>	10 hours ago	M T W T F S S	
	vm	DS-SQLCL01	19.1 GB		MTWTFSS sday, 10/04/2022 -07:00	11 hours ago	M T W T F S S	
	vm	DS-SQLCL02-39	19.0 GB	11 hours ad	kups:	11 hours ago	M T W T F S S	
		sql		Faile	××××××	Hover to view job deta	MTWTFS <b>S</b>	



Jobs					Click to log in to appliance
Active Sc	heduled Recent			Click a heading to sort	by column
Job Name 🗘	Asset ≑	Type 🗢	Started ≑	Progress 🗢	Duration 🗢
Backup Copy	Windows2012R2_SB	Backup Copy (Hot)	10/7/2022 12:42 PM		00:00:12
Backup Copy	Win8.1	Backup Copy (Hot)	10/7/2022 12:42 PM		00:00:12
Backup Copy	System Metadata	Backup Copy (Hot)	10/7/2022 12:20 PM		_



etails					Click to log in to appliance	0
Storage	Backup Copy Targ	ets Network				
Туре	Name	Capacity	Total Size	Free Size	Status	
	Internal		28.1 TB	1.6 TB	Online	
Settings					Click to log in to appliance	-12
몲	Block Local Acce	SS scal login to the appliance making it only a	ccessible through Uniview. Read more		Click to block local access	Ø
<b>(+)</b>	Support Tunnel Open support tunnel. Allo	w our support to remotely access this ap	liance. Read more		Click to open a support tunnel	

# Adding assets to an appliance

Any physical machine, virtual machine, or application you wish to protect is an *asset*. The first step in protecting an asset is adding it to the Unitrends appliance.

You can add these asset types to your backup appliance- right from UniView:

- Windows physical machines Adding the machine also adds an any hosted applications (e.g., SQL or Exchange).
- Linux physical machines Adding the machine also adds any hosted applications (e.g., Oracle on Linux).
- vCenter or ESXi servers Adding the server also adds its hosted VMs.
- Hyper-V servers Adding the server also adds its hosted VMs.

To add an asset, review the "Prerequisites and considerations", then proceed to the applicable add asset procedure below.

### Prerequisites and considerations

Ensure that these prerequisites have been met before adding your asset:

- The appliance where you are adding the asset must be a Unitrends backup appliance (adding an asset to a backup copy target appliance is not supported).
- Windows physical machine You must install the Unitrends Windows agent before adding the asset to the appliance. For details, see <u>Installing the Windows agent</u> in the <u>Administrator Guide for Recovery Series</u>, <u>Recovery</u> MAX, ION/ION+, and Unitrends Backup.
- Linux physical machine You must install the Unitrends Linux agent before adding the asset to the appliance. For details, see <u>Installing the Linux agent</u> in the <u>Administrator Guide for Recovery Series</u>, <u>Recovery MAX</u>, <u>ION/ION+</u>, and Unitrends Backup.



- Hyper-V servers
  - You must install the Unitrends Windows agent on the Hyper-V server before adding it to the appliance. For details, see <u>Installing the Windows agent</u> in the <u>Administrator Guide for Recovery Series</u>, <u>Recovery MAX</u>, <u>ION/ION+</u>, and <u>Unitrends Backup</u>.
  - Hyper-V clusters are not supported.
- VMware considerations
  - Servers running free ESXi versions are not supported and cannot be added to a Unitrends appliance.
    - **Note:** To protect a Windows or Linux VM hosted on free ESXi, you can install the Unitrends agent on the VM and add the VM to the appliance using the "Working with Unitrends Appliances, Assets, and Backups" procedure. The VM is then protected by the appliance as a physical asset.
  - If a vCenter is managing your ESXi servers, Unitrends recommends that you add to the appliance each ESXi server and the vCenter server itself. Some features that you can run from the appliance UI require a vCenter server (for example, VM instant recovery). To enable these features, you must add both the ESXi host and the vCenter server to the appliance.

### To add a Windows or Linux asset

**Note:** You must install the Unitrends Windows or Linux agent before running this procedure.

1 In the Appliances view, locate the appliance. Click Add Asset, then select Asset.

	IVIEW	Dashb	oard Prot	ect Jobs	Organizations				¢	3 🚍	?	odbaarii 🎧	nitre
rote	ect											+	- New
ส"	Spanning Licens	es 🔅											
Assign	ned ፤ 128	🖻 99											
Remai	ining 🚺 -128	🖻 -99											
Purcha	ased 🚺 0	0 🗇 🛛											
Арр	bliances As	ets Mi	crosoft 365	Google We	orkspace Sa	lesforce Micros	oft Azure						
App	Scope All		ganization	Google We Status		Order By Version	Appliance Name		Q (	Avai	ilable spa	ace 30 % o	r less
App	Scope	Or	ganization	Status ~ All	•	Order By	Appliance Name	FREE SPACE	Q C		ilable spa		
	Scope All UVM-S TGQMJ	Or A OK )064-41DC-9	ganization II •215	Status		Order By Version ~	Appliance Name tgq	FREE SPACE 140.9 GB / 199.9 GB 70.48% FREE		HELIX	STATUS	VERSIC 910.7.	DN
	Scope All UVM-S TGQMJ. AB71	Or A OCK 1064-41DC-9 140	ganization II •215	Status ~ All	LAST SEEN	Order By Version ~ MODEL VIRTUAL	Appliance Name tgq ORGANIZATION	140.9 GB / 199.9 GB	ALERTS	HELIX HELIX AUTO	STATUS ON UPDATES	VERSIC 910.7.	0N 3
App	Scope All UVM-S GTGQMJ AB71 4B1C	Or A OCK 1064-41DC-9 140	ganization II •215	Status ~ All	LAST SEEN	Order By Version ~ MODEL VIRTUAL	Appliance Name tgq ORGANIZATION	140.9 GB / 199.9 GB	ALERTS 0	HELIX HELIX AUTO	STATUS ON UPDATES Unprotec	VERSIC 010.7. S ON	3 3

2 Enter the asset's IP address. This is optional in some cases, as described here:



- DNS registration should be used for assets that obtain their network settings through DHCP. It is optional for assets with static IP addresses.
- If you do not enter a static IP address, make sure that both the asset and the appliance have DNS entries and that reverse lookup is configured.
- If you enter a static IP address, the appliance attempts to connect using this address, but if the attempt fails, it will try to add the asset using DNS.
- **3** Enter the asset's hostname.
- 4 Click Save.

Add Asset	
Appliance	
uvm- 5tgqmjjok IP Address 192.1 78-1 (If needed) Enter IP address	0
Asset Name * Add-Asset-Windows-2022 2 Enter asset's hostnam	
	Cancel Save

5 The asset is added, along with any hosted applications. Click **Unprotected Assets** to view the new asset.



	t Jobs Organizations	🔅 👺 🧭 do <b>meni</b> tre ҡ
Protect		+ New
Image: Tige Spanning Licenses ()         Assigned       Image: 128       Image: 99         Remaining       Image: -128       Image: -99         Purchased       Image: 0       Image: 0         Appliances       Assets       Microsoft 365	Google Workspace Salesforce Microsoft Azure	
Scope Organization	Status     Order By     Appliance Name       V     All     Version     tgq	Q Available space 30 % or less
● UVM-5 15 ● TGCJJOK AB <sup>+</sup> 3064-41DC-9A3D- 4B <sup>+</sup> 840	Manage C LAST SEEN MODEL ORGANIZATION FREE SPACE JUST NOW VIRTUAL UNITRENDS 140.9 GB / APPLIANCE 70.48% FRE	199.9 GB 0 HELIX ON (010.7.3
> Protected Assets		Add Asset View Unprotected Assets 12
Success	being added	Click here

**Note:** The asset is still being added if you see a spinner icon by the asset in the Unprotected Assets list.

UN	VIEW Dashboard Protect Jobs Organizations	ණි 🐯 🧿 🔵 dtnitre 🛚 🖬
Prote	ct	Unprotected Assets ×
Assign Remair Purcha	ing 🗓 -128   🖻 -99	Select unprotected assets and set a backup policy.
	Scope     Organization     Status     Order By     Applance Na       All     All     Version     tgq	Type :     Name :     Windows asset       ame     Add-Asset-Windows-2022       Image Level Instance     Add-Asset-Windows-2022
	UVM-S S-215     Manage 2 LAST SEEN MODEL ORGANIZATION     TG_JJJOK 2 MINUTES AGO     VIRTUAL UNITRENDS     AB71 064-41DC-9A3D-     4B1C 140	N 50 v per page 1 of 1 pages < > Application instance used for Windows image- level backups
	Protected Assets Type     Enter Asset Name     All     O selected   O Remove	> Set Backup Policy

6 (Optional for Windows only) Apply a backup policy to the new Image Level Instance to start running image-level backups:



**Note:** Backup policies are supported for Windows image-level assets and VMware VMs. Support for other asset types is will be included in up-coming UniView Portal releases.

- Check the Image Level Instance box.
- Click Set Backup Policy.
- Modify policy settings as needed. Click **Save**.

UN	VIEW Dashboard Protect Jobs Organizations	ලි 🦉 🧑 🔵 dbarrett@unitre 📧
Prote	ct	Unprotected Assets $\qquad \qquad \qquad$
		Select unprotected assets and set a backup policy.
<b>ہ</b> Assign	Spanning Licenses () Id 📱 128   🖻 99	Vuprotected Assets Type Enter Asset Name
Remain		All     ✓       Add-Asset     Q
Purcha	sed 👔 0   😇 0	1 selected
Арр	iances Assets Microsoft 365 Google Workspace Salesforce Microsoft Azure	Type 🗧 Name 🗢
	Scope Organization Status Order By Appliance Name	Add-Asset-Windows-2022
	All ~ All ~ Version ~ tgq	1 Add-Asset-Windows-2022
	UVM-S ; Manage ☑ LAST SEEN MODEL ORGANIZATION     TGCWJJOK JUST NOW VIRTUAL UNITRENDS     AB71 1064-41DC-9A3D-	50 v per page 1 of 1 pages < >
	4B1C 340	─── ✓ Set Backup Policy
	> Protected Assets	Backup Schedule
		The exact time that your backup runs will be up to the appliance and system scheduling. Read more about how schedules work here.
	(If needed) Modify policy settings	Exclude Weekends
		Schedule Backups
		03/24/2024
		Cancel Save

Applying the policy can take a few minutes. Once applied, the Image Level Instance asset is listed under the appliance's Protected Assets:



	cope Org	ganization	Status	Order	Ву	Appliance Name				
1	All ~ A		All	Vers	sion	~ tgqm		Q (	Available space	30 % or l
	UVM-s	5 Ma	nage 🔀 🛛 LAST SE	EN M	DDEL	ORGANIZATION	FREE SPACE	ALERTS	HELIX STATUS	VERSION
	TGQI JJOK     AB710 064-41DC-9/     4B1C7 40		JUST NO		RTUAL	UNITRENDS	140.9 GB / 199.9 GB 70.48% FREE	0	HELIX ON AUTO UPDATES ON	010.7.3
	✓ Protected Assets							Add Asset 🗸	View Unprotected A	Assets 18
	Туре		Enter Asset Name							
	All	~	Add-Asset							C
	0 selected   🕞 Remove									
	Type = Name Image Level Instance	¢		Asset is move Protected Ass		ecent Backups () 🗘	Last Backup Copy 🗢	Recent Backup	Copies 🕕 🛛 Las	t Certified 🗘
						и Т W T F S <b>S</b>		MTWTF		

In the Assets view, you can see the Backup Policy that was applied:

Scope All	· · · · · · · · · · · · · · · · · · ·	Organization	$\sim$	Appliance	$\sim$	Type All	~	Asset Name Add-Asset-Windows-2022	Q	Recent Failures
0 selected	d   ⊘ Set Backup Type≑ Name≑		nove Backup Policy Appliance \$	Remove Backup Policy	Last Full ≑	Last Backup 🗘	Recent Backups ①	¢ Last Backup Copy ≑	Recent Backup Copies (	Legend (
				,						
Imag	Add-As	set-Windows-	uvm-( - ( 3-21		Daily policy wa	s	M T W T F S S		M T W T F S S	

# To add a vCenter server

1 In the Appliances view, locate the appliance. Click Add Asset, then select VMware.



NI rote	VIEW Dashboard Protect Jobs Organizations	<ul> <li>(a) </li> <li>(b) </li> <li>(c) </li></ul>
ា Assigne Remain Purchas	ng 🗓 -128   🛅 -99	
	Assets     Microsoft 365     Google Workspace     Salesforce     Microsoft Azure       Scope     Organization     Status     Order By     Appliance Name       All     Version     Igq	Q Available space 30 % or less
	UVM-S S-215 Manage C LAST SEEN MODEL ORGANIZATION FREE SPACE     TGQMJJOK VIRTUAL UNITRENDS 140.9 GB / 199.9 GB     AB7 064-41DC-9A3D-     4B1C 40     AD	ALERTS HELIX STATUS VERSION 0 HELIX ON 010.7.3 AUTO UPDATES ON
	> Protected Assets	Add Asset  View Unprotected Assets Asset VMware Select VMware
		Hyper-V

- 2 In the Add VMware dialog:
  - Select Add vCenter from the vCenter list.

**Note:** If the appliance is running version 10.8.1 or higher and you have already added the vCenter (through the appliance UI), you can select it in the vCenter list instead of clicking **Add vCenter**.

- Enter the vCenter IP address and credentials.
- (Recommended) For best performance and to enable certain features, we recommend that you add each ESXi host that is managed by this vCenter. Click **Add Host**, enter the host IP address and credentials, then click the checkmark to save. Repeat to add another host.
- Click Save.



dd VMware						
vCenter Details						
vCenter *						
Add vCenter	-1			$\sim$		
Appliance		IP Address *				
uvm-s	15tgqmjjok	192.15		0		
vCenter Credentials						Enter IP addre
Username *		Password *			~	and credentia
root	୧	)		0		
ESXi Hosts Please add all hosts th	at are connected to your	r vCenter.				
IP Address	Username	Password				
192. 1	root	*******		×	_	
19 2	root	&	R ~	×		
	3 Add	ESXi Host				
ea	Recommended) Add ach ESXi host that is naged by the vCente		4 Cancel	Save		

- **3** The following assets are added:
  - The vCenter server
  - All VMs that reside on the ESXi hosts that this vCenter manages
  - Any ESXi hosts that you added with the vCenter
- 4 Click View Unprotected Assets to view these assets.



rotect						+ New
ា Spar Assigned Remaining Purchased	nning Licenses () 128   🕤 99 1-128   🕤 -99 0   🕤 0					
Appliance Scop All	oe Organization	Google Workspace S Status V All V	Allesforce Microsoft / Order By Version V	Azure Appliance Name tgq	م ۵	Available space 30 % or less
	UVM-S 15 TGQJJOK AB 9064-41DC-9A3D- 4B 840	Manage [2] LAST SEEN JUST NOW		NRGANIZATION FREE SP INITRENDS 140.9 GI 70.48% I	B / 199.9 GB 0	HELIX STATUS VERSION HELIX ON 010.7.3 AUTO UPDATES ON
; ⊘	Protected Assets      Success     Add VMware pending.	is being added			Add Asset ~	View Unprotected Assets 12

5 To filter the Unprotected Assets list, you can select the **VMware** Type to view the vCenter and ESXi hosts or the **VMware: VM Instance** Type to view their hosted VMs:

#### Notes:

- The asset is still being added if you see a spinner icon by the asset in the Unprotected Assets list.
- For vCenter and ESXi hosts, the Name column displays the server's IP address.
- For VMs, the Name column displays the machine's hostname.



JNIVIEW Dashboard Protect Jobs Organizations	🔞 🐯 🗿 dt. 💷 nitre 🕻
Protect	Unprotected Assets
រិ Spanning Licenses ①	Select unprotected assets and set a backup policy.
Assigned          iii 128                   iii 99         Remaining          iiiiiiiiiiiiiiiiiiiiiiiiiiiii	Unprotected Assets      Type     Enter Asset Name     VMware     Oselected   ORemove
Appliances Assets Microsoft 365 Google Workspace Salesforce Microsoft Azure	Type ⇔ Name ≎
Scope Organization Status Order By Appliance N	ame 192.1 5
All     Version     Version     tgq	192.16 1 2 VCenter and ESXi hosts display
● UVM-S S-215 Manage C LAST SEEN MODEL ORGANIZATIO TGMJJOK 2 MINUTES AGO VIRTUAL APPLIANCE APPLIANCE	VMware
4810 140	> Set Backup Policy
Type Enter Asset Name All O selected   O Remove	G
All     Image: Constraint of the second	
All     Image: Constraint of the second	Unprotected Assets
All     Image: Constraint of the second	Unprotected Assets Select unprotected assets and set a backup policy.  V Unprotected Assets
All   0 selected   Image: Selected	Unprotected Assets Select unprotected assets and set a backup policy.
All   0 selected   Image: Selected	Unprotected Assets Select unprotected assets and set a backup policy.  Unprotected Assets Type Enter Asset Name
All   0 selected   1 selected	Unprotected Assets Select unprotected assets and set a backup policy.  Unprotected Assets Type Enter Asset Name VMware:VM Instance Titler by VMware: VM Instance Titler by VMware: VM Instance
All       Image: Second status         0 selected       Image: Second status         Protect       Image: Second status         Assigned       Image: 128         Image: Second status       Order By         Appliance 1       Status         Scope       Organization	Unprotected Assets Select unprotected assets and set a backup policy. Unprotected Assets Type Enter Asset Name VMware:VM Instance Enter Asset Name Diselected Remove Type Remove Name *
All         0 selected	Unprotected Assets Select unprotected assets and set a backup policy. Unprotected Assets Type Enter Asset Name VMware:VM Instance Conselected Cons
All       Image [2]       All         0 selected       Image [2]       LAST SEEN         Model       Organization         Status       Order By         Appliances       Assets         Microsoft 365       Google Workspace         Scope       Organization         Status       Order By         Appliances       Assets         Mill       Image [2]         LAST SEEN       MODEL         ORGANIZATION	Unprotected Assets         Select unprotected assets and set a backup policy.         V       Unprotected Assets         Type       Enter Asset Name         VMware:VM Instance       Image: Colspan="2">Image: Colspan="2">Colspan="2"         Colspan="2">Colspan="2"         Colspan="2"
All       Image (2)       LAST SEEN       MODEL       ORGANIZATION	Unprotected Assets         Select unprotected assets and set a backup policy.         V Unprotected Assets         Type         Type         Enter Asset Name         VMware:VM Instance         0 selected         • Remove         • Type * Name *         121Alma3_pr         • 1610ra2-auto       2 Hosted VMs display
All       Image C       LAST SEEN       MODEL       ORGANIZATION         Appliances       Assets       Microsoft 365       Google Workspace       Salesforce       Microsoft Azure         Scope       Organization       Status       Order By       Appliance f         All       Image C       LAST SEEN       MODEL       ORGANIZATION         UVIM-S       S-215       Manage C       LAST SEEN       MODEL       ORGANIZATION         UVIM-S       S-215       Manage C       LAST SEEN       MODEL       ORGANIZATION         UNITEENDS       ABT       0.04-410C-9A3D-       4B1C       JAD       APPLIANCE       ORGANIZATION	Unprotected Assets         Select unprotected assets and set a backup policy. <ul> <li>Unprotected Assets</li> <li>Type</li> <li>Enter Asset Name</li> <li>VMware:VM Instance</li> <li>Filter by VMware: VM Instance</li> <li>Selected</li> <li>Remove</li> <li>Type © Name ĉ</li> <li>Instance</li> <li>Insta</li></ul>
All   0 selected   Image: Content of the selection of the sel	Unprotected Assets         Select unprotected assets and set a backup policy.         Unprotected Assets         Type         Enter Asset Name         WWare:VM Instance         0 selected         Protected Protected         Remove         121Alma3_pr         1610ra2-auto       2         Hosted VMs desplay         16PRalma         10       2008-CoreX64
All       Image C       LAST SEEN       MODEL       ORGANIZATION         Appliances       Assets       Status       Order By       Appliance f         All       Image C       LAST SEEN       MODEL       ORGANIZATION	Unprotected Assets         Select unprotected assets and set a backup policy.         V Unprotected Assets       Enter Asset Name         Type       Enter Asset Name         VMWare:VM Instance       Q         0 selected       Remove         1       Filter by VMware: VM Instance         0 selected       Remove         1       1610ra2-auto         2       Hosted VMs daplay         0       161PRalma         0       2008-Corex86

6 (Optional) Apply a backup policy to the new VMs to start running VMware host-level backups:

**Note:** Backup policies are supported for Windows image-level assets and VMware virtual machine assets. Support for other asset types is will be included in up-coming UniView Portal releases.



- Check boxes to select one or more VMs. In this example, we've checked the Select All box to apply a policy to all the newly added VMs.
- Click Unprotected Assets to hide the assets list.
- Click Set Backup Policy.
- Modify policy settings as needed. Click **Save**.

UNIVIEW Dashboard Protect Jobs Organizations	🕸 🜻 🧭 🔵 dt 📰 nitre 📧
Protect Unpre	otected Assets ×
រាំ Spanning Licenses ①	protected assets and set a backup policy. Unprotected Assets Type Enter Asset Name VMware:VM Instance  Q
Purchased II 0   🖬 0 Appliances Assets Microsoft 365 Google Workspace Salesforce Microsoft Azure 1	49 selected   O Remove
Scope     Organization     Status     Order By     Appli     Check boxes to select VMs       All      All      Version      tgq	☑ 💿 121Alma3_pr
● UVM-S S-215 Manage [7] LAST SEEN MODEL ORGANIZATION 2 TG_JJJOK ORGANIZATION 2 MINUTES AGO VIRTUAL UNITEENDS	<ul> <li>☑ 1610ra2-auto</li> <li>☑ ☑ 16PRalma</li> </ul>
AB71 1064-41DC-9A3D- 4B1C 140	2008-CoreX64
✓ Protected Assets	2008-Corex86
Type Enter Asset Name	2008-Datacenter1x86     2008-Datacenter1x64
0 selected   O Remove	✓ ✓ 2008-Enterprise1x86

Protect		Unprotected Assets
<b>ີ</b> Spanning Licenses ①		Select unprotected assets and set a backup policy.
Assigned 🗓 128   🖻 99		> Unprotected Assets
Remaining 🚺 -128   😇 -99 Purchased 🚺 0   😇 0	0	Set Backup Policy Backup Schedule 2 Modify policy settings as needed
Appliances Assets Microsoft 365	Google Workspace Salesforce Microsoft Azure	The exact time that your backup runs will be up to the appliance and system
Scope Organization	Status Order By Appliance Name	scheduling. Read more about how schedules work here.
All	Status     Order By     Appliance Name       V     All     Version     tgq	asheduling. Dead more shout how eshedules work here
		e scheduling. Read more about how schedules work here.  Exclude Weekends



Applying the policy can take a few minutes. Once applied, the VMs are listed under the appliance's Protected Assets.

Switch to the Assets view to see the Backup Policy that was applied.

### To add an ESXi host

Use this procedure to add a stand-alone ESXi host.

- **Note:** If your ESXi host is being managed by a vCenter, we recommend using the "To add a vCenter server" procedure to add both the vCenter and the ESXi host.
- 1 In the Appliances view, locate the appliance. Click Add Asset and select VMware.

	d Protect Jobs Organizations			têj 🜻 🧑 🖷 🕸	initre K
Protect					+ New
□     Spanning Licenses ()       Assigned     128       Remaining     1       ·128     □       ·99       Purchased     0					
Appliances Assets Micros		Salesforce         Microsoft Azure           Order By         Appliance Name           Version         Version	٩	Available space	30 % or less
UVM-5 5-2 TGQMJJOK AB7 064-41DC-9A3D- 4B1( 40	JUST NOW	MODEL ORGANIZATION VIRTUAL UNITRENDS APPLIANCE	FREE SPACE         ALE           140.9 GB / 199.9 GB         0           70.47% FREE         0	RTS HELIX STATUS HELIX ON AUTO UPDATES ON	VERSION ()10.7.3
> Protected Assets			Ass	d Asset  View Unprotect set Ware Select VMw	
			Hyp	per-V	C

- 2 In the Add VMware dialog:
  - Select **None** from the vCenter list.
  - Click Add Host. Enter the host IP address and credentials, then click the checkmark to save. Repeat to add another host.
  - Click Save.



Add VMware			
vCenter Details			
vCenter *			
None1			$\sim$
ESXi Hosts			
Please add all hosts tha	at are connected to your	/Center.	
IP Address	Username	Password	
192. 1	root	*****	×
19 2	root	····· @	× ×
3	Add E	SXi Host2	4
Enter host IP address		(	5
and credentials		Ca	ncel Save

- **3** The following assets are added:
  - Each ESXi host that you added
  - All VMs that reside on the ESXi hosts that you added
- 4 Click View Unprotected Assets to view these assets.



<b>T</b> Spai	anning Licenses 🛈							
ssigned								
	📕 128   🖻 99							
Remaining	🗓 -128   🖻 -99							
ourchased	i 0   🖻 0							
Applianc	ces Assets Microsoft 365	Google Workspace Sa	lesforce Microso	oft Azure				
Scop		Status	Order By	Appliance Name				
All	I ~ All	~ All ~	Version ~	tgq		Q ()	Available space	30 % or less
	UVM-S 15	Manage 🖸 LAST SEEN	VIRTUAL	ORGANIZATION	FREE SPACE	ALERTS	HELIX STATUS HELIX ON	VERSION 10.7.3
	AB 9064-41DC-9A3D-	JUST NOW	APPLIANCE	UNITRENDS	140.9 GB / 199.9 GB 70.48% FREE	0	AUTO UPDATES ON	010.7.3
	4B1 840							
;	> Protected Assets					Add Asset $\sim$	View Unprotected A	ssets 12

5 To filter the Unprotected Assets list, you can select the VMware Type to view your ESXi hosts or the VMware: VM Instance Type to view their hosted VMs:

#### Notes:

- The asset is still being added if you see a spinner icon by the asset in the Unprotected Assets list.
- When the host is first added, the Name column displays the server's IP address. The IP address is replaced by the server's hostname once the UniView Portal checks in with the Unitrends appliance.
- For VMs, the Name column displays the machine's hostname.

	ect Jobs Organizations	🔞 🚆 🧑 🛑 dt 👘 nitre
rotect		Unprotected Assets
¬         Spanning Licenses ⑤           Assigned         ■         128         ■         99           Remaining         ■         -128         ■         -99           Purchased         ■         0         ●         0		Select unprotected assets and set a backup policy.   Unprotected Assets  Type Enter Asset Name  VMware  Selected  Filter by VMware  Selected  Charlen Content of the set of the
Appliances Assets Microsoft 365 Scope Organization All  All	Google Workspace     Salesforce     Microsoft Azure       Status     Order By     Appliance Name       V     All     Version     Igq	Type ©         Name ©           Image: State of the
UVM-S S-215     TG/JJOK     AB71 064-41DC-9A3D-	Manage         LAST SEEN         MODEL         ORGANIZATION           2 MINUTES AGO         VIRTUAL         UNITRENDS           APPLIANCE         APPLIANCE	> Set Backup Policy



NI	VIEW Dashboard Protect Jobs Organizations	ලි 📜 ල od 🚛 nitre
rote	ect	Unprotected Assets
<b>ت</b> ا : Assigne Remain	ing ≟ -128   🖻 -99	Select unprotected assets and set a backup policy.       V     Unprotected Assets       Type     Enter Asset Name       VMware;VM Instance     Q
	eed 🖬 0   🖻 0 iances Assets Microsoft 365 Google Workspace Salesforce Microsoft Azure Scope Organization Status Order By Appliance Nar	0 selected   ○ Remove Type ≎ Name ≎ Imme 121Alma3_pr
	All     Version     Version	
		1610ra2-auto     2     Hosted VMs display
	UVM-S     S-215     Manage C     LAST SEEN     MODEL     ORGANIZATION     ZMINUTES AGO     VIRTUAL     UNITRENDS	
	TG_JJJOK     Z MINUTES AGO     VIRTUAL     UNITRENDS     AB71     064-41DC-9A3D-     APPLIANCE	N I I I I I I I I I I I I I I I I I I I
	TG_MJJOK     Z MINUTES AGO VIRTUAL UNITRENDS     AB71 064-41DC-9A3D-     4B1C 140	N         Image: Construction of the factor of the fac
	TG_MJJOK     2 MINUTES AGO     VIRTUAL     UNITRENDS     APPLIANCE     VIRTUAL     UNITRENDS     APPLIANCE     VIRTUAL     VIRTUAL	Image: Control of the contro

6 (Optional) Apply a backup policy to the new VMs to start running VMware host-level backups:

**Note:** Backup policies are supported for Windows image-level assets and VMware virtual machine assets. Support for other asset types is will be included in up-coming UniView Portal releases.

- Check boxes to select one or more VMs. In this example, we've checked the Select All box to apply a policy to all the newly added VMs.
- Click Unprotected Assets to hide the assets list.
- Click Set Backup Policy.
- Modify policy settings as needed. Click **Save**.



Prote	ect	Unprotected Assets
ਹ <sup>7</sup>	Spanning Licenses ()	Select unprotected assets and set a backup policy.
Assigne	e de la construcción de la constru	2 ──── Unprotected Assets
Remain		Type Enter Asset Name
Purcha		VMware:VM Instance V
		49 selected   O Remove
Appl	iances Assets Microsoft 365 Google Workspace Salesforce Microsoft Azure	I Type ≎ Name ≎
	Scope         Organization         Status         Order By         Appli         Check to select           All          All          Version         tgg	voves to VMs ☑
		V 🥽 1610ra2-auto
	UVM-S S-215 Manage Anage LAST SEEN MODEL ORGANIZATION     Z MINUTES AGO VIRTUAL UNITRENDS	🔽 🧑 16PRalma
	AB71 064-41DC-9A3D- 4B1C 140	2008-CoreX64
	✓ Protected Assets	✓ 2008-Corex86
	Type Enter Asset Name	☑ 💿 2008-Datacenter1x86
	All	- 2008-DatacenterX64
	0 selected   \ominus Remove	2008-Enterprise1x86
NI	VIEVV Dashboard Protect Jobs Organizations	
rote	ct	iĝi 🜻 🧿 🖶 di 👘 nitr
Prote	ct Spanning Licenses ①	زی 🤔 🤨 🔵 ط 👘 nitr
Prote ਜ'	ct Spanning Licenses () ed I 128 I 7 99	<ul> <li>         O         O         <ul> <li></li></ul></li></ul>
Prote די Assigne	Ct Spanning Licenses () ed (128) (1799) ing (1-128) (17-99)	
Prote די Assigne Remain	Ct           Spanning Licenses ()           id         ii 128           img         ii -128           ii -128         ii -99	<ul> <li>@ ? @ dt nitr</li> <li>Unprotected Assets</li> <li>Select unprotected assets and set a backup policy.</li> <li>Unprotected Assets</li> <li>Set Backup Policy Backup Schedule</li> <li>2 Modify policy softmgs as needed</li> </ul>
Prote	Ct           Spanning Licenses ()           id         ii 128           img         ii -128           ii -128         ii -99	<ul> <li></li></ul>
Prote	ct Spanning Licenses () rd [] 128 [] 99 ing [] -128 [] 99 ing [] -	<ul> <li></li></ul>
Prote	Spanning Licenses ()         ed       128         ing       1-128         ig       0	<ul> <li></li></ul>
Prote	ct Spanning Licenses () rd [] 128 [] 99 ing [] -128 [] -99 sed [] 0 [] [] 0 iances Assets Microsoft 365 Google Workspace Salesforce Microsoft Azure Scope Organization Status Order By Appliance Nam	<ul> <li></li></ul>
Prote	ct         Spanning Licenses ()         id       128         ig       128         ig       -128         ig       -128         ig       0         ig       0 <td><ul> <li></li></ul></td>	<ul> <li></li></ul>
Prote	ct Spanning Licenses () ed () 128 () 199 ing () -128 () 199 ed () 0 () 10 iances Assets Microsoft 365 Google Workspace Salesforce Microsoft Azure Scope Organization Status Order By Appliance Nam All \vee All \vee Version \vee Igq	<ul> <li></li></ul>

Applying the policy can take a few minutes. Once applied, the VMs are listed under the appliance's Protected Assets.

Switch to the Assets view to see the Backup Policy that was applied.

# To add a Hyper-V host

Use this procedure to add a Hyper-V host.



1 In the Appliances view, locate the appliance. Click Add Asset, then select Hyper-V.

UNI	VIEVV Dashboard Prote	ct Jobs Organizations		🔞 🌻 🧭 💧 🖕 initre 📧
Prote	ct			+ New
Assigne Remain Purchas	ing 🗓 -128   🖻 -99	Google Workspace Salesforce Micros	soft Azure	
	Scope Organization All  All	Status Order By	Appliance Name	Q Available space 30 % or less
	UVM-5     S-     JMXLYZ68     2074 8D8-461D-82AC-     0855	Manage 🖸 LAST SEEN MODEL JUST NOW VIRTUAL APPLIANCE	ORGANIZATION FREE SPACE UNITRENDS 63.9 GB / 199.9 GB 31.98% FREE	ALERTS HELIX STATUS VERSION 0 HELIX ON 10.8.1 AUTO UPDATES ON
	> Protected Assets			Add Asset  View Unprotected Assets Asset
				VMware Hyper-V Select Hyper-V

- 2 In the Add Hyper-V dialog:
  - Enter the host IP address and hostname.
  - Click Save.

Add Hyper-V		
Details		
Appliance		
uvm-s		
IP Address *		
19 30		?
Hostname * 1 Enter host IP Address and Hostname		
win2019-hyperv-host		?
	2	
	Cancel	Save



- Release 2.50 | April 2024
- 3 The Hyper-V host and its virtual machines are added. Click View Unprotected Assets to view these assets.

UN	Dashboard Protect	Jobs Organizations	🕄 🜻 🕜 🔵 dt. 🛛 itre 🛚 🛙
Prot	tect		+ New
Assig Rema Purch	Spanning Licenses ()         Igned       128       99         halming       -128       99         chased       0       9         chased       0       9         ppliances       Assets       Microsoft 365	Google Workspace Salesforce Microsoft Azure	
	Scope Organization           All         V	Status     Order By     Appliance Name       V     All     Version     z68	Q Available space 30 % or less
	UVM-5 S- JMXLVZ68 2D7 BD8-461D-82AC- 08: 78	A MINUTE AGO VIRTUAL UNITRENDS	FREE SPACE         ALERTS         HELIX STATUS         VERSION           63.9 GB / 199.9 GB         0         HELIX ON         10.8.1           31.98% FREE         AUTO UPDATES ON
	> Protected Assets		Add Asset View Unprotected Assets
e	Success	s being added	Click here

- 4 These newly added assets display in the Unprotected Assets list:
  - The Hyper-V host (asset type is *Windows*)
  - Hosted virtual machines (asset type is *Hyper-V: VM Instance*)
  - One or more Hyper-V application instances (asset type is *Hyper-V*)
  - An application instance that can be used to run image-level backups of the Windows Hyper-V host server (asset type is *Image Level Instance*)

Note: The asset is still being added if you see a spinner icon by the asset in the Unprotected Assets list.

Hover over an icon to see an asset's type. You can filter the list by asset type or asset name using the fields above.



					Unprotected	Accete		
rotect	t							
ក្ Sp	panning Licenses 🗊				Select unprotected		et a backup policy.	
Assigned	128   🖻 99				<ul> <li>Unprotecter</li> <li>Type</li> </ul>		er Asset Name	
Remaining	g 🚺 -128   🖻 -99				All	~		Q
Purchased	d 🗄 O   🖻 O				0 selected	🕞 Remo	ove	
Appliar	nces Assets Microsoft 365	Google Workspace Sale	lesforce Microsoft Azu	ire			łame ≑	
Sc	cope Organization	Status	Order By App	pliance Name		💼 h	IVVM-86	
	All ~ All	<ul><li>✓ All ✓</li></ul>	Version ~ Z6			•		
					Hyper-	i hi V:VM Instance	w-√vm-87	Virtual
	UVM-S S- JMXLYZ68	Manage 🖸 LAST SEEN		ANIZATION RENDS			IV-1 -vm-88	machines
	2D7 38D8-461D-82AC- 0B5 878		APPLIANCE			Hyper-V	w /m-89	
							Hyper-V 2022	Hyper-V application
						12		
	> Protected Assets					<u> </u>		
						Vindows	vin-server-27-1	
						Vindows	vin-server-27-1 vin2019-hyperv-host	Hyper-V host
					N N	Vindows		Ну

## Removing assets from an appliance

You can remove these asset types from your appliance-right from UniView:

- Windows physical machines
- Linux physical machines
- vCenter or ESXi servers
- Hyper-V servers

From the Appliance page or Appliance Detail page, you can remove one or more assets in a single operation. Before removing an asset, review the "Prerequisites and considerations for removing assets". Then use the "To remove selected assets from an appliance" procedure to remove assets.

Note: You can also use the Assets page to remove assets from appliances. For details, see "Removing assets".

### Prerequisites and considerations for removing assets

The following requirements and considerations apply:

- Before you can remove an asset, you must remove any UniView backup policy or remove the asset from any Unitrends job schedules.
- When an asset is removed, all associated backups of that asset are also deleted. Please use caution when removing an asset.



- Removing an asset also removes any associated asset instances, along with the backups of those instances. For
  example, removing an ESXi host removes its hosted VMs and the VM backups. Removing a Windows asset
  removes its image-level instance and any hosted application instances (e.g., Exchange or SQL), and backups of
  these instances.
- When a Hyper-V or VMware virtual host is removed, all backups of its VMs are also deleted. However, if you have added a vCenter server and the ESXi hosts it's managing, the VM backups are not deleted from the appliance if you remove only the vCenter server. The backups are not deleted unless you also remove the ESXi host servers.
- Hyper-V runs on a Windows server. When you add a Hyper-V server, the following assets are added:
  - The Hyper-V host (which is the Windows server that is running the Hyper-V application; asset type is *Windows*)
  - Hosted virtual machines (asset type is *Hyper-V: VM Instance*)
  - One or more Hyper-V application instances (asset type is Hyper-V)
  - An application instance that can be used to run image-level backups of the Windows Hyper-V host server (asset type is *Image Level Instance*)

To remove the Hyper-V server you must remove the Windows server asset.

ct unprotected a	ssets and set a back	kup policy.	
<ul> <li>Unprotecte</li> </ul>			
Туре	Enter	Asset Name	Q
0 selected	Premove		
	Type 🌩	Name 🗢	
ŀ	lyper-V:VM Instance	BK-auto-DND	
		bk-fedora20	
	Windows	Hv-139-39	
	<b>e</b>	HV-21-32 Windows server running Hyper	
Check to	Hyper-V	Hyper-V 2012	
delete Hyper-V	ę	Hyper-V 2019 — Hyper-V application	

- Windows agent For Windows assets protected with a Unitrends agent:
  - Asset configuration settings are saved in the *master.ini* file, which is located in the \PCBP directory on the Windows system drive (e.g.,C:\PCBP\). Deleting the asset from the Unitrends appliance also removes this file from the asset itself and any customized settings you have added are lost. Be sure to save the asset's



*master.ini* file before deleting if you think you may want to add the asset to this or another Unitrends appliance and want to use these settings. After adding the asset back to an appliance, replace the standard *master.ini* file with the one you have saved.

- If you are using Windows replicas and you remove the Windows asset while a virtual recovery is in progress, the deletion may not be instantaneous. The clean up takes time because the recovery is shut down and the virtual replica asset is removed.
- Linux agent For Linux assets protected with a Unitrends agent, asset configuration settings are saved in the *master.ini* file (located here by default: /usr/bp/bpinit/master.ini). Deleting the asset from the Unitrends appliance also removes this file from the asset itself and any customized settings you have added are lost. Be sure to save the asset's *master.ini* file before deleting if you think you may want to add the asset to this or another Unitrends appliance and want to use these settings. After adding the asset back to an appliance, replace the standard *master.ini* file with the one you have saved.

### To remove selected assets from an appliance

- **CAUTION!** When an asset is removed, all backups of that asset are also deleted. When removing a virtual host, all backups of its VMs are also deleted. Be sure to review the "Prerequisites and considerations for removing assets" and use caution when removing an asset.
- 1 In the Appliances view, locate the appliance whose assets you will remove.
- 2 Click **Protected Assets** or **View Unprotected Assets** to view the assets you will remove. In our example, we are removing unprotected assets.

UNIVIEW	Dashboard Protect Jobs Organizations	🚱 👺 🧭 🔵 db 🔤 unitre 😿
	Protect	+ New
	Image: Spanning Licenses ()         Assigned       Image: T28         Image: T28       Image: T99         Purchased       Image: T99         Purchased       Image: T99         Appliances       Assets       Microsoft 365       Google Workspace       Salesforce       Microsoft Azure	
	Scope Organization Status Order By Appliance Name           All         All         All         Version         uvm         Available space           UVM-S         S-         Manage (2)         LAST SEEN         MODEL         ORGANIZATION         FREE SPACE         ALERTS         HELIX STATUS           HS0WS60S         JUST NOW         VIRTUAL         UNITRENDS         104.9 GB / 199.9 GB         0         HELIX ON           222         7/350-468A-90F0-         APPLIANCE         S2.49%, FREE         ON         ON	30 % or less VERSION 10.8.1
	> Protected Assets Add Asset > View Unprotect	led Assets

3 In the Unprotected Assets dialog, click to expand the assets list. Check boxes to select the assets you will remove.

You can remove these asset types (hover over the Type icon to check an asset's type):

- Windows Use to remove a Windows asset or a Hyper-V server (for details, see "Prerequisites and considerations for removing assets")
- Linux Use to remove a Linux asset
- VMware Use to remove a vCenter or ESXi server



**Note:** Removing an asset also removes any hosted application instances and backups of those hosted instances.

- 4 Click Remove.
- 5 Type **DELETE** and click **Remove** to remove the assets.

UNI	VIEVV Dashboard Protect Jobs Organizations		🔞 😍 🕜 🔵 dt itre	ĸ
Prote	Remove Assets ×		Unprotected Assets	×
<b>1</b> Assign Remail Purcha	By pressing Remove you will delete the following assets:  Alma  api-st for me-2 When an asset is removed, all of its backups are deleted (backup copies are not deleted). Type DELETE to confirm *  DELETE	oft Azure	Select unprotected assets and set a backup policy.	
	Cancel Remove	Appliance Name	Alma	
	UVM-S SS- HS0WS60S 2237DI /5C-468A-90F0- 8A1A0 37 LAST SEEN Manage [2] LAST SEEN JUST NOW Select assets APPLIANCE APPLIANCE		I windows api-st me ✓ windows api-s ne-2	ļ
	> Protected Assets		Berter aptre ne-2      Host Component(AzMan Security Database for Hyper-V)	
			Host Component(AzMan Security Database for Hyper-V)	
			Hyper-V 2016	

### Blocking or unblocking local access to an appliance

UniView enables users to restrict local access to the Unitrends appliance. The appliance UI and management functions can still be accessed through UniView. Blocking local access enforces 2FA, significantly reduces potential security exposure, and allows admins greater access controls through roles and scopes in UniView.

Once local access has been blocked, users can no longer log in directly to the appliance UI. Instead, users must connect to the appliance from UniView (as described in "Connecting to an appliance").

Consider the following before blocking local access:

- To block or unblock local access, you must log in to UniView as a Superuser, Admin, or Manage user. (UniView users with Monitor access cannot block or unblock local access.)
- To block or unblock local access, the Unitrends appliance must be running version 10.7.2 or higher.
- Hot backup copy to a Unitrends appliance target To add a Unitrends appliance backup copy target to the appliance, local access must be unblocked on the backup copy target appliance. If needed, use the procedure below to unblock local access on the target appliance before adding the hot backup copy target. Once the target has been added, use the procedure below to block local access.



- iSeries protection To protect your iSeries platform, you must log in to the appliance directly from the local network. Do NOT block local access if your appliance is protecting an iSeries environment.
- Appliance disaster recovery (DR) Local access must be unblocked on the DR target appliance. Once you have
  recovered the configuration and last backups from the failed appliance, use this procedure to block local access
  on the target appliance.

To block or unblock local access:

1 In the Appliances view, click the appliance.

UNI		ard Protect Jobs	s Organizations				© (	<u> </u>	🔵 db	itre	к
Prote	ct						а	Click to dd an appli		+ New	
ភ្7 ខ	Spanning Licenses 🕢										
Assigne	ed 🚺 118   🖻 13										
Remaini	ing 🚺 -118   🛅 -13										
Purchas	sed ፤ 0   🖻 0										
		rosoft 365 Good ization Sta		Microsoft Azure Order By Free Space ~	Appliance Name ub-98	C	2	Available	e space	30 % or les	s
	• VMWARE-UB-98 = E38 = E6-4118-84 06D	Manage Select the appl	JUST NOW	MODEL VIRTUAL APPLIANCE	ORGANIZATION	FREE SPACE 172.0 GB / 199.9 GB 86.06% FREE	ALERTS 0	HELIX (		VERSION 10.7.10	
	> Protected Assets						Add Asset 、	View	/ Unprotecte	ed Assets	

- 2 On the Appliance Details page, scroll down to the Settings section. In the Block Local Access tile:
  - indicates that local access is unblocked (users can access the appliance UI by entering https://<appliancelPaddress>/ui/ in a browser on the local network).
  - Indicates that local access is blocked (users must access the appliance UI by logging in to UniView and clicking the appliance's button, as described in "Connecting to an appliance").

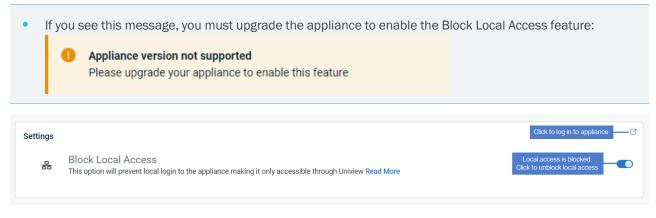
#### 3 Do one of the following:

- Click O to block local access.
- Click I to unblock local access.

#### Notes:

- If the toggle is disabled (SO), you are using Monitor user credentials and cannot block or unblock local access.
- It may take a minute or two to block or unblock access. During this transition time, the O or D toggle is disabled (S).





## Opening or closing a support tunnel

UniView enables you to open a secure tunnel connection to your Unitrends appliance, which Support can use to quickly troubleshoot issues. The Unitrends appliance must be running version 10.7.9 or later to use the support tunnel feature.

Use this procedure to open a support tunnel. When you're done working with Support, use this procedure to close the tunnel connection.

To open or close a support tunnel:

1 In the Appliances view, click the appliance.

rotect								Click to	+ New
<b>T</b> Spa Assigned Remaining Purchased	anning Licenses () (1) 118   13 (1) -118   13 (1) -13 (1) 0   10 0						au	d an appliance	
Appliand Sco Al	ope Organ		Google Workspace Status All ~	Microsoft Azure Order By Free Space ~	Appliance Name ub-98	Q		Available space	30 % or les
	VMWARE-UB-98 E38 D6D 0	Mar Select the	age 🕜 LAST SEEN JUST NOW appliance	MODEL VIRTUAL APPLIANCE		FREE SPACE 172.0 GB / 199.9 GB 86.06% FREE	ALERTS 0	HELIX STATUS HELIX OFF AUTO UPDATES OFF	VERSION 10.7.10

- 2 On the Appliance Details page, scroll down to the Settings section. In the Support Tunnel tile:
  - • or indicates that a support tunnel is open.
  - Om indicates that there is no support tunnel connection to this appliance.



- **3** Do one of the following:
  - Click 🕑 to close the support tunnel. The tunnel is closed and this message displays:



• Click O to open a support tunnel. The tunnel is opened and this message displays:

	(+)		rt Tunnel port tunnel. Allow our support	to remotely acc	sess this appliance. Read more	
		⊘ Su	pport tunnel enabled	×		<b>Q</b> Í
Note:	lf you	see thi	s message, you m	ust upgra	de the appliance to enable the S	upport Tunnel feature:
	9		ance version not su e upgrade your appl		able this feature	

## Connecting to an appliance

UniView Portal supports opening multiple connections in parallel, so you can configure and manage multiple appliances from a single browser.

Use this procedure to connect to a Unitrends appliance. Repeat these steps to connect to additional appliances. Each connection opens in a separate browser tab.

To connect to an appliance:

**1** In the Appliances view, locate the appliance and click its **Manage** button.



Release 2.50 | April 2024

UN	Dashboard	Protect Jobs Organizations		Ø	🦉 🧑 🔵 db 🚟 nitre 📧
Prot	ect				+ New
ា Assig Rema Purch	ining İ -118   🖻 -13	5 1	Microsoft Azure Order By Free Space V Ub-98		Available space 30 % or less
	<ul> <li>VMWARE-UB-98</li> <li>E38</li> <li>E38</li> <li>E6-</li> <li>B-8453-</li> <li>Click here</li> <li>Show protected assets</li> </ul>	Manage [2] LAST SEEN JUST NOW	MODEL ORGANIZATION VIRTUAL T	FREE SPACE         ALERTS           172.0 GB / 199.9 GB         0           86.06% FREE         0	HELIX STATUS VERSION HELIX OFF 010.7.5 AUTO UPDATES OFF

2 The appliance Login page displays in a new browser tab. Enter credentials and click Log In.

UniView X 🔳 r	4.proxy_ge-b × +	V	- 0	×
← → C 🔒 m Lproxy	:backup.net/ui/#/ Login screen displays in a new tab	i£ ☆	* 🗆 🔮	. :
Kaseya				
	Password U credu	nter entials		
	Help & Support   © Kaseya 2023			



Working with Unitrends Appliances, Assets, and Backups

## Modifying Helix Auto Update settings

Helix is an intelligent SaaS remediation platform laser focused on eliminating manual tasks that IT administrators hate performing. Helix uses a SaaS delivery model to keep your Unitrends backup appliances updated, no matter where they are located.

Use these steps to enable or disable Helix and the Helix Auto Update feature on one or more appliances:

- 1 In the Appliances view, check one or more boxes to select the appliances you will modify.
- 2 At the bottom of your screen, click **Appliance Settings**.
- 3 Enable or disable the Helix and Auto Update features.

#### Notes:

- Helix must be enabled to use the Auto Update feature. Disabling Helix also disables Auto Update.
- To use the Auto Update feature, the appliance must be running release 10.4.4 or higher and these ports must be open on the appliance:
  - 5721 outbound to IP 173.247.66.64 for the TCP and UDP protocols.
  - 443 outbound to repo.unitrends.com for the HTTPS protocol.
- 4 Click Save.

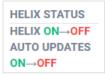




Release 2.50 | April 2024

ส'	Spanning Licenses 🕡								
Assign	ned 🚺 118   🖻 13								
Remair	ning 🚺 -118   😇 -13								
Purcha									
arona									
Appl	liances Assets Microsoft 3	65 Google	Norkspace	Microsoft Azure					
	Scope Organization	Status		Order By	Appliance Name				
	All ~ All	∼ All	$\sim$	Version ~		Q		Available space	30 % or les
	UVM-S S-	Manage 🖸	LAST SEEN	MODEL	ORGANIZATION	FREE SPACE	ALERTS	HELIX STATUS	VERSION
	■ R S		JUST NOW	VIRTUAL	UNITRENDS	198.7 GB / 199.9 GB	0	HELIX ON	10.7.6
	11 83-			APPLIANCE		99.39% FREE		AUTO UPDATES	
	5F 357								
	> Show protected assets								
	VMWARE-UB-8	Manage 🖸	LAST SEEN JUST NOW	VIRTUAL		FREE SPACE 127.2 GB / 199.9 GB	ALERTS 0	HELIX STATUS HELIX ON	VERSION
	A 400 0600		JUSTNUW	VIRTUAL	1 Cart	63.65% FREE	U	AUTO UPDATES	<b>U</b> 10.7.4
~			liances Setti	nas	×			OFF	
~	C E5 Helix is enab	Holiv		5					
2	C E5 Helix is enab Click to disable	TIEIIX							
1					3				
Delect	Click to disable     Show protected assets		elix		3				
1 elect	Show protected assets	I He		Enable	or disable				
1 elect	Show protected assets	ed. Au	elix Ito Update	Enable		FREE SPACE	ALERTS	HELIX STATUS	VERSION
1 elect ance	Click to disable     Click to disable     Show protected assets     Auto Update is disable     Click to action	ed.		Enable	or disable	36.0 GB / 36.7 GB	ALERTS 0	HELIX OFF	VERSION
1 elect	Show protected assets     Auto Update is disable     UVM-t     Click to enable Auto Update	ed. Au		Enable	or disable Auto Update				

- 5 Helix settings are enabled or disabled for the selected appliances.
  - It can take up to 20 seconds to update these settings. While updates are in progress, a transitional status displays. For example:



• If Helix is not supported on the appliance or if an error occurs, the features are not enabled. You are notified through a BackupIQ alert and this Helix status displays:





## Adding an appliance

Before adding the appliance, ensure that the "Port requirements" have been met. Then use this procedure to add the appliance: "To add an appliance".

## Port requirements

To enable communication between your Unitrends appliance and the UniView Portal, port 443 for the TCP and HTTPS protocols must be open outbound from the appliance to each of these locations:

- login.backup.net
- {homerealm}.backup.net
- proxy.backup.net
- api.backup.net
- download.backup.net
- index.docker.io
- hub.docker.com
- registry-1.docker.io
- production.cloudflare.docker.com
- public.ecr.aws
- \*.cloudfront.net
- \*.awsglobalaccelerator.com

## To add an appliance

1 In the Appliances view, click + New.

	EW	Dashboard	Protect	Jobs Oi	ganizations				භි	🤗 📀 🥌	db nitre.
rotect										Click here	e + Ne
J' Span	ning Licenses 🚯										
Assigned	118	<b>1</b> 3									
Remaining	🗵 -118	<b>-13</b>									
Purchased	<b>I</b> 0	<b>0</b>									
Appliance	es Assets	Microso		Google Wo	orkspace	Salesforce Micr	rosoft Azure Appliance Name				
	es Assets	Microso			orkspace ~				Q D	Available space	30 % or less
Scope	es Assets	Microso	tion	Status		Order By	Appliance Name		۹ 🗖	Available space	30 % or less
Scope All	es Assets	Microso Organizati All	tion	Status All		Order By	Appliance Name	FREE SPACE 1.1 TB / 1.4 TB	ALERTS	Available space HELIX STATUS HELIX ON	30 % or less VERSION 10.7.6

2 Assign an organization to the appliance by doing one of the following:



- Note: You cannot change the appliance's organization once it has been assigned. You can, however, edit the organization's name or scope at any time. To assign a different organization to an appliance, you must delete the appliance integration from UniView and the appliance UI (see "Deleting an appliance") and then add the appliance with the new organization. Backup policies must be recreated upon re-adding the appliance.
- Select an organization from the Name list.

Add A New Appliance	$\times$
Choose the organization you would like to associate your new appliance with.	
Name *	
	$\sim$
Midco Annuities	*
Mississippi Sax	
Muddy Waters Select an organization	
New EBP	
O'Connell - Bashirian	
Old Guard Corp.	
Palmers Supply	415
Pe t Organization	+ E

OR

- Click Add New Organization and do one of the following:
  - If you have integrated your PSA system (ConnectWise Manage, Autotask, BMS, or Vorex), use the Import Organizations dialog to select an organization and scope.
  - If you have not integrated a PSA system, use the Add Organization dialog to enter the organization name, select a scope, and click **Save**.



UniView Portal Guide Release 2.50 | April 2024

Choose the	e organization you would like to associate y	our new appliance with.	
Name *			
		$\checkmark$	
Select organiz	ration from the list		
	OR		
	+ Add new organizat	tion	
	Add Organization		>
	Add organization		Calada ana
	Name	Scope *	Select a scope
	Midco Annuities	✓ Northwest Region	
	IVIIUCO ATITUITIES		

### 3 Click Next.

Add A New Appliance	×
Choose the organization you would like to associate your new	appliance with.
Name *	
Midco Annuities	~
Select organization from the list	
OR	
+ Add new organization	
	Click here
	Cancel Next

4 Copy the backup.net ID that displays. (Leave this dialog open. Do not click Done.)



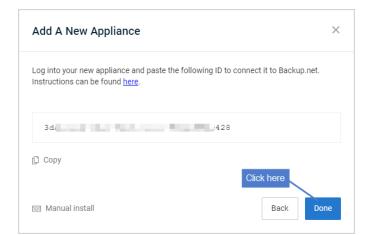
Add A New Appliance	×
Log into your new appliance and paste the following ID to connect it to Backup.net Instructions can be found <u>here</u> .	
3di ::::::::::::::::::::::::::::::::::::	
Circk here	
🔤 Manual install 🛛 🛛 🗖	one

5 Log in to the Unitrends appliance. In the Edit Appliance dialog, click **Backup.net Config**, then paste the ID into the Backup.net ID field. Click **Save**. Click **OK**.

	IDS					🏟 🗳 🧒 😦 root
B Dashboard	Appliances Protected	Assets 3				
Protect	View:Table 🚯 Add Appliand	ice 🔀 Edit 🛞 Remove				
3 Recover						
🗄 Jobs	APPLIANCE	STATUS	ADDRESS	VERSION	STORAGE	REGISTERED ASSETS
1 Reports	Recovery-608-Source	Available (logged in)	19	10.6.8-2.202108312206.CentOS6		310
© Configure	1	2 Select the appliance				
	Edi	lit Appliance	-	0		
		General Email Users	Date Time License	Backup Copy Advanced		
		Name jt to	Ø	Backup.net Settings		0
		IP Address 190	0			
		FQDN vi n	0		enter a valid UUID provided by Uniview/Backs	ip.net.
	orongo onano,				5 P	aste the backup.net ID here
	🗹 Edit 🛞 Remo					
	NAME 👻			<sup>0</sup> Information		0
	U Internal			Running setup. This may take a few momen	ts to complete	R6- Save Close
					ок	
		4				
		Shutdown/Restart Backup.net Config		Save Cancel		
		Shotoown/restart Backoputer Cornig		Save		
ackup.net Settin	igs			0		
	NGS			0		
BACKUP.NET INTE		b0e 🕑		0		
ackup.net Settin BACKUP.NET INTE Backup.net ID: Integration Status:	b46			0		
BACKUP.NET INTE	b46	boe 🛛 🖉		0		
BACKUP.NET INTE	b46			•		
BACKUP.NET INTE	b46			•		

6 Return to the UniView Portal. Click **Done**.





The appliance is added and displays in the Appliances list.

#### Notes:

- It can take a few minutes for the appliance to display in the list. If needed, refresh the page.
- For increased appliance security, the UniView Portal has a feature that blocks users from logging in directly to the appliance UI. Once local access has been blocked, users must connect to the appliance from UniView. To use this feature, see "Blocking or unblocking local access to an appliance".

## Deleting an appliance

Deleting an appliance removes all of its data from the UniView Portal. Deleting the appliance does not remove or otherwise alter any of its backup data.

To delete an appliance:

**IMPORTANT!** Be sure to complete all steps in this procedure to ensure that the appliance integration is removed from both UniView and the appliance itself.

**1** In the Appliances view, click the appliance.



Release 2.50 | April 2024

UNIVIEW Dashboard Protect Jobs	Organizations	(한) 😤 🕜 🔵 db 🛛 vitre 📧
Protect		+ New
ຖ <sup>7</sup> Spanning Licenses ()		
Assigned 🚺 118   🔁 13		
Remaining 🚺 -118   🖻 -13		
Purchased 🚺 0   🔁 0		
Appliances Assets Microsoft 365 Google V	Vorkspace Salesforce Microsoft Azure	
Scope Organization Status	Order By Appliance Name	
All ~ All All	✓ Last Time Se ✓ <u>hv</u>	Available space 30 % or less
Click the appliance		
HV-2     6	LAST SEEN MODEL ORGANIZATION FREE SPACE	HELIX STATUS
776 338-46 358- 5AA21 377	4 MONTHS AGO VIRTUAL MUDDY WATERS 72.62% FREE	0 AUTO UPDATES 10.6.8
UNITED TO THE OWNER OF		ON→OFF

2 On the Appliance Detail page, click  $\widehat{\blacksquare}$ . Type DELETE and click the **Delete** button.

	Protect Jobs Organizations		😥 🚝 🧭 da 🔤 nitre 😠
< Appliance Detail			<b>1</b> —ŵ
① Appliance Alerts 🛛 Assets 🗂 Jobs	i⊟ Details 🐵 Settings 🛛 Manage		Delete An Appliance ×
HV-200 126     776204     56-     56-     56-     56-     776205     Protected Assets	IP ADDRESS LAST SEEN 1	MODE VIRTU APPL	You are about to delete HV-200-226. Deleting this appliance will remove all of its data from Unitrends MSP. It will no longer be accessible from the portal. Deleting HV-20 <sub>*</sub> _26 does not remove or otherwise alter any of its backup data. To confirm, please type <b>DELETE</b> in the field below.
Appliance Alerts	Completed .	Jobs	DELETE 2 Type DELETE
0	6		Type DELETE Cancel DELETE

3 Log in to the Unitrends appliance. In the Edit Appliance dialog, click **Backup.net Config**, then click **Remove**. Click **OK**.



UNITRENE						🏟 🗘 🕐 🕐 😆 root 🥤
B Dashboard	Appliances Protected As	sets 3				
A Protect	View:Table O Add Appliance	Remove				
🖹 Jobs	APPLIANCE	STATUS	ADDRESS	VERSION	STORAGE	REGISTERED ASSETS
Reports	Recovery-608-Source	O Available (logged in)	19. 100 37	10.6.8-2.202108312206.CentOS6		310
© Configure		2 Select the appliance			_	
	Edit #	Appliance	_	0		
		General Email Users	Date Time License	Backup Copy Advanced Backup.net Settings		0
		ame p	0	BACKUP.NET INTEGRATION SETUP		· · · · · · · · · · · · · · · · · · ·
	IP .	Address 19	0	Backup.net ID: dcmining and	2d16	
	Storage Backup FQ	VT VT	Ø	Integration Status: Connected		
	🗹 Edit 🛞 Remo					
	NAME 🚽		Informa	ation	<b>0</b>	
	🖬 Internal		Rotting ag	ni removal ensure you also remove the applance from the backgure		5- Remove Save Close
					ок	
					6	
	s	ihutdown/Restart Backup.net Config		Save Cancel		

## Viewing assets

On the Protect page, click **Assets** to switch to Assets view. The view displays the assets protected by all Unitrends appliances that have been added to your backup.net instance. Click a column heading to change the sort order of the display. To view additional pages of assets, use the scroll arrows below. (To filter the display, see "Filtering the Assets view".)

The following information is given for each asset:

- Select checkbox
  - Use with Set Backup Policy or Remove Backup Policy to quickly modify the backup policy of one or more Windows image-level assets or VMware virtual machines. You can only select Windows image-level assets or VMware VMs that are protected by host-level backups. For details, see "Working with backup policies".
  - Use with **Remove** to quickly remove selected assets from appliances. For details, see "Removing assets".

**CAUTION!** When an asset is removed, all associated backups of that asset are also deleted. When removing a virtual host, all backups of its VMs are also deleted. Be sure to review the "Prerequisites and considerations for removing assets" and use caution when removing an asset.

- Type icon Indicates the asset type. Hover over the icon for type description. Asset type examples: VMware VM Instance, Windows (file-level), Image Level Instance (Windows), Linux, SQL.
- Name Asset name.
- Appliance Appliance name.
- Backup Policy Asset's backup policy: Weekly, Daily, 4x/day, Bihourly, Hourly, Custom, Appliance UI, or Error. See "Backup policy descriptions" for details.
- Last Full Size of the last successful full backup.



- Last Backup Number of minutes, hours, days, weeks, or months since the last backup.
- Recent Backups Icons indicating the status of backups over the last seven days. Hover over an icon to see job details. Click an icon to view asset details.
  - All backups were successful
  - Recovery point has been certified by a data copy access (DCA) job. For details, see <u>Recovery Assurance</u> in the <u>Administrator Guide for Recovery Series</u>, Recovery MAX, ION/ION+, and Unitrends Backup.
  - One or more backups failed or ran with warnings
  - 🗹 Backup was successful but was not certified
  - X All backups failed
  - No backups were taken
- Last Backup Copy Number of minutes, hours, days, weeks, or months since the last hot or cold backup copy.
- Recent Backup Copies Icons indicating the status of backup copies over the last seven days. Hover over an icon to see job details (date/time and the number of hot and cold backup copies). Click an icon to view asset details.
  - All backup copies were successful
  - One or more backup copies failed or ran with warnings
  - All backup copies failed
  - 📃 No backup copy was taken
- Last Certified Number of minutes, hours, days, weeks, or months since a backup has been certified by a data copy access (DCA) job.





NI	VIEV	/V Da	ashboard Prote	ct Jobs (	Organizations				ණ ද	🔮 🕐 🔵 db 👘 re
otec	ct									
ิ <b>⊓</b> ' S	Spanning	Licenses 🚯								
ssigned		118   🖻	13							
emainin		] -118   🖻								Backup data ingested successfully
Purchase	ed 🚺	] 0   🖻	0						•	Backup job produced warnings
									$\times$	Backup failed
Applia	ances	Assets	Microsoft 365	Google W	orkspace	Salesforce I	Vicrosoft Azure			Recovery point has been certified
	_									Backup successful but was not
cope			Organization		Appliance		rpe All N	Asset Name		Certified Q Recent Failures
All	ind i O	× Cot Bookup Dol	All	Rockup Doligy						Legend
	ted ∣ @ <b>Type</b> ≑	Ƴ Ƴ Set Backup Pol Name≑		Backup Policy	Remove	Last Backup 🗸	Click a column head	ing to sort the display Last Backup Copy ≑	Recent Backup Copie	Hover to view icon legend
selecte	_	🖉 Set Backup Pol	icy $igodot$ Remove	Backup Policy	Remove		Recent Backups ③ ≑ TWTFSSM	· · · ·	TWTFSSM	Hover to view icon legend
selecte	Type ≑	g Set Backup Pol Name ≑ ≪k-win-50 win-vm-	icy   Remove  Appliance   Appliance   Appliance   wwware-ub-	Backup Policy	Remove Last Full ÷	Last Backup 🗲	Recent Backups 🕒 ≑	Last Backup Copy \$	T W T F S S M Friday, 9/08/2023 UTC-07:00	Hover to view icon legend
selecte	Type ÷	Set Backup Pol Name = ek-win-50 win-vm- 51	icy ⊖ Remove Appliance ≎ €`-vmware- ub-	Backup Policy Backup Policy	<ul> <li>○ Remove</li> <li>✓ Last Full ⇒</li> <li>34.0 GB</li> <li>10.2 GB</li> </ul>	Last Backup 13 hours ago 3 days ago	Recent Backups ③ ≑ TWTFSSM	Last Backup Copy ÷ 13 hours ago 4 days ago	T W T F S S M Friday, 9/08/2023	Hover to view icon legend s • Last Certified = 13 hours ago
select	Type 🗘	Set Backup Pol Name = @k-win-50 win-ym- 51	icy © Remove Appliance ⇒ C-vmware- ub-1	Backup Policy Backup Policy	Concernence Remove	Last Backup 🗸	Recent Backups ③ ≎ T W T F S S M T W T F S S M Sunday, 9/10/2023 T UTC-0700 Backups:	Last Backup Copy $\Rightarrow$ 13 hours ago	T W T F S S M Friday, 9/08/2023 UTC-07:00 Backup Copies: Hot Copies Successes 2	Hover to view icon legend s • Last Certified = 13 hours ago
selecte	Type ÷	Set Backup Pol Name = @k-win-50 win-ym- 51 win-ym- ReF6- Win-201	icy O Remove Appliance C C-ymware- ub ymware-ub- 12 Click to view asset details ymware-ub-	Backup Policy Backup Policy	<ul> <li>○ Remove</li> <li>✓ Last Full ⇒</li> <li>34.0 GB</li> <li>10.2 GB</li> </ul>	Last Backup 13 hours ago 3 days ago	Recent Backups ③ ≎ T W T F S S M T W T F S S M Sunday, 9/10/2023 T UTC-07.00 Backups: Successes Certification:	Last Backup Copy ÷ 13 hours ago 4 days ago	T W T F S S M Friday, 9/08/2023 UTC-07:00 Backup Copies: Hot Copies Successes 2	Hover to view icon legend s • Last Certified = 13 hours ago
selecto	Type $\Leftrightarrow$	Set Backup Pol Name = dk-win-50 win-vm- 51 win-vm- ReF0-	icy O Remove Appliance =	Backup Policy Backup Policy Weekly	• Remove           • Last Full =           34.0 GB           10.2 GB           26.5 GB	Last Backup 13 hours ago 3 days ago 3 days ago	Recent Backups ③ ≎ T W T F S S M T W T F S S M Sunday, 9/10/2023 T UTC-0700 Backups: Successes	Last Backup Copy 13 hours ago 4 days ago days ago 1 1	T W T F S S M Friday, 9/08/2023 UTC-07:00 Backup Copies: Hot Copies Successes T W T F S S M T W T F S S M	Hover to view icon legend s • Last Certified = 13 hours ago
select	Type ÷	Set Backup Pol Name = elk-win-50 win-vm- 51 win-vm- 51 win-vm- ct an image-le ware VM to set of backup po Malbox Databas	icy O Remove Appliance =	Backup Policy Backup Policy Weekly 4x/day	Remove           Last Full =           34.0 GB           10.2 GB           26.5 GB           34.6 GB	Last Backup 13 hours ago 3 days ago 3 days ago 3 days ago 3 days ago	Recent Backups • +	Last Backup Copy ÷ 13 hours ago 4 days ago	T W T F S S M Friday, 9/08/2023 UTC-07:00 Backup Copies: Hot Copies Successes T W T F S S M T W T F S S M	Hover to view icon legend s • Last Certified = 13 hours ago
select	Type 0	Set Backup Pol Name = @k-win-50 win-vm- 51 win-vm- Refe- ware VM to set to backup po backup pol backup pol Mailbox patabas	icy  Remove Appliance  Appliance  Communication Communicat	Backup Policy Backup Policy Weekly 4x/day Daily Daily	<ul> <li>Remove</li> <li>Last Full =</li> <li>34.0 GB</li> <li>10.2 GB</li> <li>26.5 GB</li> <li>34.6 GB</li> <li>9.2 GB</li> </ul>	Last Backup 13 hours ago 3 days ago 3 days ago 3 days ago 3 days ago 3 days ago	Recent Backups ③ ≎           T W T F S S M           T W T F S S M           Sunday, 9/10/2023           T UT-07:00           Backups:           Successes           Certification:           Successes           T W T F S S M	Last Backup Copy = 13 hours ago 4 days ago 1 1 Hover over a status id	T W T F S S M Friday, 9/08/2023 UTC-07/00 Backup Copies: Hot Copies Successes T W T F S S M T W T F S S M W T F S S M	Hover to view icon legend s • Last Certified = 13 hours ago

Click the asset to view these details:

- Last Full Size of the last successful full backup.
- Last Backup Number of minutes, hours, days, weeks, or months since the last backup.
- Last Backup Copy Number of minutes, hours, days, weeks, or months since the last hot or cold backup copy.
- Last Certified Number of minutes, hours, days, weeks, or months since a backup has been certified by a data copy access (DCA) job.
- Job Details Lists jobs that are currently running or have completed in the last few minutes. Shows the job name, status, and progress bar. If a job is currently running, you may opt to click **X** to cancel the job. Click **See All** to view all active jobs.
- Recovery Points Lists the asset's recovery points (local backups and backup copies) by date.
- Local Icon indicating the status of the backup. Click an icon to view log details.
  - for success
  - for job ran with warnings
  - 🛛 🛑 for failure



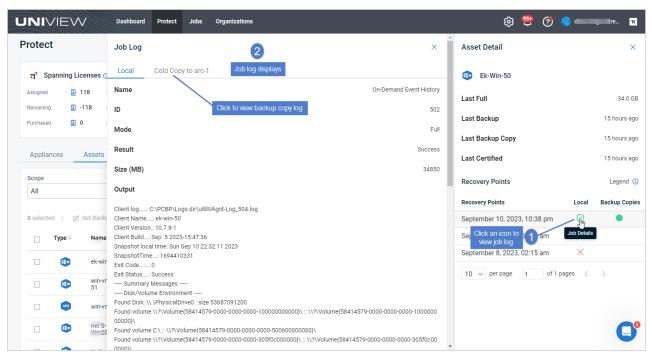


- For recovery point has been certified by a data copy access (DCA) job. For details, see <u>Recovery</u>
   Assurance in the Administrator Guide for Recovery Series, Recovery MAX, ION/ION+, and Unitrends Backup.
- If or DCA certification job ran with warnings.
- Backup Copies Icon indicating whether a hot or cold backup copy was taken for the backup: 
   indicates a successful copy was taken,
   indicates a copy ran with warnings,
   indicates a copy was attempted but failed, no icon indicates that no copy was taken. Hover over an icon to see the backup copy type (hot or cold).

rotect						
J' Spanning Licenses 🕠						
.ssigned 🚺 118   👩	13					
emaining 🔝 -118   🖥	-13					
Purchased 🚺 0   🕻	0					
Appliances Assets	Microsoft 365	Google Workspace	Salesforce Microsoft Azure			
соре	Organization	Appliance	Туре	Asset Name		Decent
All ~	All	~ All	~ All	~	Q	- I difdres
) selected   🕜 Set Backup F	Policy 🕞 Remove B	Backup Policy <sub> O</sub> Remove				Legend 🤅
Type ≎ Name ≎	Appliance 🗘	Backup Policy Last Full 🗢	Last Backup 🗧 🛛 Recent Backups 🛈 🗘	Last Backup Copy 🗘	Recent Backup Copies ()	Last Certified ≑
🗆 🥶 🤆 -win-	Click here	34.0 GB	15 hours ago	15 hours ago	TWTFSSM	15 hours ago
win-vm-	vmware-ub-	Weekly 10.2 GB	3 days ago TWTFSSM	4 days ago	TWTFSSM	
	Dashboard Protect	Jobs Organizations			© 😤 (	🦻 🔵 c 🚬 initre
	Dashboard Protect	Jobs Organizations			ලි 🚏 🤇	?) 🔵 ć 🚬 initre
otect	Dashboard Protect	Jobs Organizations			Asset Detail	🧿 🥚 communitre t details display
otect ਜ <sup>7</sup> Spanning Licenses ੁ	Dashboard Protect	Jobs Organizations			Asset Detail	
otect ন <sup>°</sup> Spanning Licenses ্ত ssigned ্র 118 ় হ		Jobs Organizations			Asset Detail Asset Ek-Win-50	t details display
otect ਜ਼ਾ Spanning Licenses () ssigned ਛੇ 118   ਵ temaining ਛੇ -118   ਵ	g 13 g -13	Jobs Organizations			Asset Detail Asset Ek-Win-50 Last Full Last Backup	t details display 3
Totect T Spanning Licenses () kasigned (1) 118 ( ) kemaining (1) -118 ( ) Purchased (1) 0 ( )	] 13 ] -13 ] 0				Asset Detail Asset Etail	t details display 15 ho 15 ho
Totect T Spanning Licenses () kasigned (1) 118 ( ) kemaining (1) -118 ( ) Purchased (1) 0 ( )	g 13 g -13		Salesforce Microsoft Azure		Asset Detail Asset Ek-Win-50 Last Full Last Backup	t details display 3
a)*       Spanning Licenses ()         ssigned       iii         issigned       iiii         issigned       iiiii         issigned       iiiiii         issigned       iiiiiii         issigned       iiiiiiiiiii         issigned       iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii	] 13 ] -13 ] 0		Salesforce Microsoft Azure	Asset Name	Asset Detail Asset Etail	t details display 15 ho 15 ho
rotect	9 13 9 -13 9 0 Microsoft 365	Google Workspace		Asset Name	Asset Detail Asset Ek-Win-50 Last Full Last Backup Last Backup Copy Last Certified	t details display 15 ho 15 ho 15 ho Leg
rotect	13 7-13 7 0 Microsoft 365 Organization All	Google Workspace Appliance All	Туре		Asset Detail Asset Ek-Win-50 Last Full Last Backup Last Backup Copy Last Certified Recovery Points	t details display 15 ho 15 ho 15 ho Leg ied Local Backup
T       Spanning Licenses ()         Assigned       III8         T       118         Remaining       II         Purchased       I         Q       Assets         Scope         All         Q       Selected         I       I         Q       Selected	a 13 b -	Google Workspace Appliance All ackup Policy © Remove	Type	×	Asset Detail Asset Ek-Win-50 Last Full Last Backup Last Backup Copy Last Certified Recovery Points Recovery Points	t details display 15 ho 15 ho 15 ho 15 ho Leg ied Local Backup m C
rotect	13 7-13 7 0 Microsoft 365 Organization All	Google Workspace Appliance All	Туре		Asset Detail Asset	t details display 15 ho 15 ho 15 ho Leg ied Local Backup m Cold Co

Click a recovery point or status icon to view the job log:





## Filtering the Assets view

The Assets view displays the assets protected by all Unitrends appliances that have been added to your backup.net instance.

To filter the display, enter filter criteria in any of the following:

- Scope Select a scope from the list. (Select All to clear the scope filter.)
- Organization Select an organization from the list. (Select All to clear the organization filter.)
- Appliance Select an appliance from the list. (Select All to clear the appliance filter.)
- Type Select one of the following to filter by asset type: AHV VM Instance, AIX, Exchange, Exchange Instance, Generic OS, Hyper-V, Hyper-V VM Instance, Image Level Instance (Windows), iSeries, Linux, Mac OS, NDMP Device, NDMP Device Instance, Novell OES, Oracle, Oracle Instance, Other OS, SCO, SharePoint, SharePoint Instance, Solaris, SQL Server, SQL Server Instance, UCS Service Profile, UCS Service Profile Instance, VMware, VMware VM Instance, Windows (file-level), Xen, or Xen VM Instance. (Select All to clear the filter.)
- Asset Name field Enter a text string, then press Enter to apply. Asset names containing the text you entered display.
- Recent Failures Click to slide the switch and view assets with recent failures.



Release 2.50 | April 2024

NIV	IEW Da	shboard Prote	ct Jobs Org								
otect											
ក្' Spar	nning Licenses 🕡										
ssigned	118   🖻 1	13									
emaining	🗓 -118   🖻 -	13									
urchased	i 0   T (	D									
All	~	All		ppliance vmware-ub-1		ype	→ Asset Name	er search text	Q	Recent Failures	
selected	🕑 Set Backup Polic	cy $\bigcirc$ Remove	Backup Policy	vmware-ub-11	1213 🗸	All	✓ 20 Ent			Failures Legend	<b>(</b> )
selected		Cy O Remove	~ · ·	Remove	113 V	All Recent Backups ① ≎		Recent Backup Copies		Failures	(1)
selected	🕑 Set Backup Polic	cy $\bigcirc$ Remove	Backup Policy	vmware-ub-11	1213 🗸	All	✓ 20 Ent			Failures Legend	(1)
selected	⊘ Set Backup Polie Ype≑ Name≑	cy © Remove Appliance \$ vmware-ub-	Backup Policy	Remover Enter Ente	1213 V er filter criteria Last Backup ÷ 33 minutes	All Recent Backups ⊕ ≎ W T F S S M T	✓ 20 Ent	Recent Backup Copies		Failures Legend	(1)
selected	I Set Backup Polis ype ÷ Name ÷ E EXCH2016 RES-	cy   Remove  Appliance   vmware-ub-  11 13 vmware-ub-	Backup Policy Backup Policy Hourty	Remov Last Full ÷	■13 or filter criteria Last Backup ÷ 33 minutes ago	All Recent Backups ③ ≎ W T F S S M T W T F S S M T	✓ 20 Ent	Recent Backup Copies		Certified =	(
selected	1 2 Set Backup Polie ype  Name  EXCH2016 EXCH2016 Nin2012R2 SQL2022-	Cy ORemove Appliance = vmware-ub- 1113 vmware-ub- 113 vmware-ub-	Backup Policy Backup Policy Hourly Hourly	C Remove Enter Last Full = 73.9 GB 34.6 GB	and a second se	All Recent Backups ③ ≎ W T F S S M T W T F S S M T W T F S S M T	✓ 20 Ent	Recent Backup Copies W T F S S M T W T F S S M T W T F S S M T		Certified =	(i)
	1              ⊘ Set Backup Polity            ype ÷         Name ÷           Image: Set Backup Polity            mage: Set Backup Polity            Image: Set Backup Polity            Image: Set Backup Polity            Image: Set Backup Polity            Image: Set Backup Polity            Image: Set Backup Polity            Image: Set Backup Polity            Image: Set Backup Polity            Image: Set Backup Polity            Image: Set Backup Polity            Image: Set Backup Polity            Image: Set BackupPolity	Appliance = vmware-ub- 1113 vmware-ub- 1113 vmware-ub- 1113 vmware-ub- 1113 vmware-ub- 1113 vmware-ub- 1113 vmware-ub-	Backup Policy Backup Policy Hourly Hourly Daily	Remov Enter     Last Full =     73.9 GB     34.6 GB     30.5 GB	13     ,       ar filter criteria     ,       Last Backup =     33 minutes       ago     4 days ago       5 days ago     5 days ago	AII Recent Backups ③ ≎ W T F S S M T W T F S S M T W T F S S M T W T F S S M T	✓ 20 Ent	Recent Backup Copies W T F S S M T W T F S S M T W T F S S M T W T F S S M T		Failures Legend Certified =	3

## **Removing assets**

UniView enables you to remove these asset types from your Unitrends appliances:

- Windows physical machines
- Linux physical machines
- vCenter or ESXi servers
- Hyper-V servers

From the Assets page, you can remove assets from multiple appliances in a single operation. Before removing an asset, review the "Prerequisites and considerations for removing assets". Then use the "To remove assets from appliances" procedure to remove assets.

**Note:** You can also use the Appliance page to remove assets from an appliance. For details, see "Removing assets from an appliance".

### Prerequisites and considerations for removing assets

The following requirements and considerations apply:

• Before you can remove an asset, you must remove any UniView backup policy or remove the asset from any Unitrends job schedules.



- When an asset is removed, all associated backups of that asset are also deleted. Please use caution when removing an asset.
- Removing an asset also removes any associated asset instances, along with the backups of those instances. For example, removing an ESXi host removes its hosted VMs and the VM backups. Removing a Windows asset removes its image-level instance and any hosted application instances (e.g., Exchange or SQL), and backups of these instances.
- When a Hyper-V or VMware virtual host is removed, all backups of its VMs are also deleted. However, if you have added a vCenter server and the ESXi hosts it's managing, the VM backups are not deleted from the appliance if you remove only the vCenter server. The backups are not deleted unless you also remove the ESXi host servers.
- Hyper-V runs on a Windows server. When you add a Hyper-V server, the following assets are added:
  - The Hyper-V host (which is the Windows server that is running the Hyper-V application; asset type is Windows)
  - Hosted virtual machines (asset type is *Hyper-V: VM Instance*)
  - One or more Hyper-V application instances (asset type is Hyper-V)
  - An application instance that can be used to run image-level backups of the Windows Hyper-V host server (asset type is *Image Level Instance*)

To remove the Hyper-V server you must remove the Windows server asset.

t unprotected a	assets and set a bac	kup policy.		
/ Unprotecte				
Type All	Enter	r Asset Name		Q
0 selected	I ⊖ Remove			
	Туре 🗘	Name ≑		
	Hyper-V:VM Instance	BK-auto-DND		
		bk-fedora20	Virtual machine	
	Windows	Hv-139-39		
	R		Windows server unning Hyper-V	
Check to	Hyper-V	Hyper-V 2012		
delete Hyper-V	ę	Hyper-V 2019	Hyper-V application	

• Windows agent – For Windows assets protected with a Unitrends agent:



- Asset configuration settings are saved in the *master.ini* file, which is located in the \PCBP directory on the Windows system drive (e.g.,C:\PCBP\). Deleting the asset from the Unitrends appliance also removes this file from the asset itself and any customized settings you have added are lost. Be sure to save the asset's *master.ini* file before deleting if you think you may want to add the asset to this or another Unitrends appliance and want to use these settings. After adding the asset back to an appliance, replace the standard *master.ini* file with the one you have saved.
- If you are using Windows replicas and you remove the Windows asset while a virtual recovery is in progress, the deletion may not be instantaneous. The clean up takes time because the recovery is shut down and the virtual replica asset is removed.
- Linux agent For Linux assets protected with a Unitrends agent, asset configuration settings are saved in the *master.ini* file (located here by default: /usr/bp/bpinit/master.ini). Deleting the asset from the Unitrends appliance also removes this file from the asset itself and any customized settings you have added are lost. Be sure to save the asset's *master.ini* file before deleting if you think you may want to add the asset to this or another Unitrends appliance and want to use these settings. After adding the asset back to an appliance, replace the standard *master.ini* file with the one you have saved.

## To remove assets from appliances

Use this procedure to remove assets from one or more appliances.

**CAUTION!** When an asset is removed, all associated backups of that asset are also deleted. When removing a virtual host, all backups of its VMs are also deleted. Be sure to review the "Prerequisites and considerations for removing assets" and use caution when removing an asset.

1 In the Assets view, check boxes to select the assets that you will remove.

You can remove these asset types (hover over the Type icon to check an asset's type):

- Windows Use to remove a Windows asset or a Hyper-V server (for details, see "Prerequisites and considerations for removing assets")
- Linux Use to remove a Linux asset
- VMware Use to remove a vCenter or ESXi server
- Note: You can filter the assets list to quickly locate the assets to delete. In our example, we've applied a Type filter to display only Windows assets.

#### 2 Click Remove.

- **Note:** Removing an asset also removes any hosted application instances and backups of those hosted instances.
- 3 Type **DELETE** and click **Remove** to remove the assets.



rotect	Dashboard	Protect Jobs Organizat	ions			\$\$ 📮 (?	) 🔵 dt 💷 <u>tre</u>
ਜ਼' Spannir	ng Licenses (j						
Assigned	I 128						
Remaining	128 5 -99						
Purchased	<b>I</b> 0 🖃 0						
Scope	Organization	n Appliand	ce	Type Windows	Asset Name	Q	Recent Failures
				windows v		~	
2 selected		move Backup Policy		Remove Assets			end ()
	Set Backup Policy ORe		ove 2	Remove Assets	ete the following assets:		end 🚯
2 selected   Type	Set Backup Policy ORe	move Backup Policy 🕞 Rem	ove-2		ete the following assets:		end $\textcircled{1}$
2 selected   Type	@ Set Backup Policy ⊙ Re e : Name : sabled due to backup policy	move Backup Policy O Rem Appliance 🗢 Backup P	ove-2	Remove Assets By pressing Remove you will de win-15-2 win-16	ete the following assets: fits backups are deleted (backup copi		end $\textcircled{1}$
2 selected   Type Dis	Set Backup Policy  Ref  Sabled due to backup policy win-15-2	move Backup Policy   Rem Appliance  Backup P ub-20 Appliance	ove-2	Remove Assets By pressing Remove you will de win-15-2 win-16 When an asset is removed, all o Type DELETE to confirm *			end $\textcircled{1}$
2 selected   Type Dis 2 selected   Type	© Set Backup Policy O Re sabled due to backup policy win-15-2 win-15-1 Select	move Backup Policy © Rem Appliance = Backup P ub-20 (Appliance max9s-464	ove-2	Remove Assets By pressing Remove you will de win-15-2 win-16 When an asset is removed, all o			end $\textcircled{1}$
2 selected   Type Dis 2 selected   Type	Sabled due to backup policy  win-15-2  win-15-1 Select  win-16	move Backup Policy © Rem Appliance = Backup P ub-20 Appliance max9s-464 assets ps-464 recovery-	ove-2	Remove Assets By pressing Remove you will de win-15-2 win-16 When an asset is removed, all o Type DELETE to confirm *		ies are not deleted).	end $\textcircled{1}$

## Working with backup policies

Backup policies enable you to customize your backup strategy to meet the recovery point objectives (RPOs) and recovery time objectives (RTOs) required for your business continuity plan.

From the Protect > Assets page, you can quickly view and manage the policies that define the frequency at which backups are taken for your assets— and set or remove policies for multiple assets in a single operation.

Backup policies utilize the *incremental forever* backup strategy. Once a good full backup has been taken, subsequent incrementals run to capture only the changes in the protected data since the last successful backup.

Backups initiated by a policy display on the Jobs page. They are labeled with the job name "UniView-AssetName", as shown here:

Note: For more on working with the jobs initiated by backup policies, see "Working with Jobs".



Working with Unitrends Appliances, Assets, and Backups

obs			8									
Recent	Active	Scheduled										
cope		Organization	Applia	ince	Asset Name	Status		Туре	Star	t	End	
All	$\sim$	All	~ All	~	ek-win	ک All	~	All	~	t d		۵
24 16 8												
0 Sep 03	Sep 04	Sep 05	Sep 06	Sep 07	Sep 08	Sep 09	Sep 10	Sep 11	Sep 12	Sep 13	Sep 14	Sep 15
Appliance \$		Job Name≑		Asset≑	Status≑		Type 🗢		Started 🗢		Duration \$	
i-vmware		UniView-ek	-win-51	ek-win-51	Succes		Backup		9/14/2023	4:10 AM	-	
-vmware	-ub-TT-	UniView-ek	-win-51	Backups run 1 ek-win-51	or backup policy Succes	s	Backup		9/14/2023	3:46 AM	_	

For details on working with backup policies, see these procedures:

- "To view backup policies"
- "To select assets for backup policies"
- "To set a backup policy"
- "To remove a backup policy"

## To view backup policies

On the Protect page, click **Assets** to switch to Assets view. The view displays the assets protected by all Unitrends appliances that have been added to your backup.net instance. The Backup Policy column shows the asset's backup policy. Each backup policy type is described below.



NI	VIEV	V Dash	board Protec	t Jobs	Organizations				\$	<u></u>	db tre
rotec	t										
<b>ی</b> ק" Sp Assigned Remaining Purchased Applia	g I			Google W	Vorkspace S	Salesforce	Microsoft Azure				
Scope All			rganization All	~	Appliance vmware-ub-1		ïype All ∽	Asset Name		Q	Recent Failures
0 selecte	ed I n?	Set Backup Policy		Backup Policy	Repart Back	up Policy column					Legend 🕕
	ed   🖉 Type 🌣	? Set Backup Policy Name ≑	Remove	Backup Policy Backup Polic		up Policy column Last Backup ≑	n Recent Backups ① ≑	Last Backup Copy 🕀	Recent Backup Copi	ies 🕕 🛛 La	Legend 🕡
0 selecte			-			· · ·		Last Backup Copy ÷	Recent Backup Copi		-
0 selecte	Type ‡	Name 🗘	Appliance \$	Backup Polic	cy Last Full 🗦	Last Backup ÷	Recent Backups ③ ≑ W T F S S M T	Last Backup Copy 🕆	WTFSSMT		ast Certified 🗢
0 selecte	Type 🌣	Name ¢ EXCH2016 Win1u7-	Appliance vmware-ub-	Backup Polic	cy Last Full ≎ 73.9 GB	Last Backup ≎ 24 minutes ago 26 minutes	Recent Backups () W T F S S M T W T F S S M T	Last Backup Copy ≑	W T F S S M <b>T</b> W T F S S M <b>T</b>		ast Certified $\Rightarrow$
	Type ‡	Name = EXCH2016 Win1. 7- 2	Appliance vmware-ub- 1 3 vmware-ub- 1 3 vmware-ub-	Backup Polic Hourly Hourly	<b>2y Last Full ≎</b> 73.9 GB 39.7 GB	Last Backup ÷ 24 minutes ago 26 minutes ago	Recent Backups () = W T F S S M T W T F S S M T W T F S S M T	Last Backup Copy ≎	W T F S S M T W T F S S M T W T F S S M T		ast Certified =
	Type ≎	Name CEXCH2016	Appliance  vmware-ub- 3 vmware-ub- 3 vmware-ub- 3 vmware-ub- 3 vmware-ub-	Backup Polic Hourly Hourly Daily	cy Last Full ≎ 73.9 GB 39.7 GB 34.6 GB	Last Backup ⇒ 24 minutes ago 26 minutes ago 4 days ago	Recent Backups () •           W T F S S M T           W T F S S M T           W T F S S M T           W T F S S M T           W T F S S M T           W T F S S M T	Last Backup Copy ⇒	WTFSSMT WTFSSMT WTFSSMT WTFSSMT		ast Certified = > > > > > >
	Type ÷	Name © EXCH2016 Win1U7- 2 RmfS- Win2012R2 Unitrends Mailbox	Appliance  vmware-ub- 3 vmware-ub- 3 vmware-ub- 3 vmware-ub- 3 vmware-ub- 3 vmware-ub- 3	Hourly Hourly Daily Daily	Last Full : 73.9 GB 39.7 GB 34.6 GB 9.2 GB	Last Backup ↔ 24 minutes ago 26 minutes ago 4 days ago 4 days ago	WTFSSMT	Last Backup Copy ≎	WTFSSMT WTFSSMT WTFSSMT WTFSSMT WTFSSMT		ast Certified =
	Type ÷	Name : EXCH2016 Win1U7- 2 Ruffs- Win2012R2 Unitrends Mailbox Database SQL2022-	Appliance   vmware-ub-  vmware-ub-  vmware-ub-  vmware-ub-  vmware-ub-  1  vmware-ub- 1  vmware-ub- 1  vmware-ub- 1  vmware-ub- 1  vmware-ub- 1  vmware-ub- 1  vmware-ub- 1  vmware-ub- 1	Hourly Hourly Daily Daily 4x/day	<ul> <li>Last Full =</li> <li>73.9 GB</li> <li>39.7 GB</li> <li>34.6 GB</li> <li>9.2 GB</li> <li>8.9 GB</li> </ul>	Last Backup ÷ 24 minutes ago 26 minutes ago 4 days ago 4 days ago 4 days ago 4 days ago	W T F S S M T           W T F S S M T           W T F S S M T           W T F S S M T           W T F S S M T           W T F S S M T           W T F S S M T           W T F S S M T           W T F S S M T           W T F S S M T	Last Backup Copy ≑	W T F S S M T W T F S S M T		ast Certified =
	Type •	Name = EXCH2016 Win1 2	Appliance  vmware-ub- 3 vmware-ub- 3 vmware-ub- 1 3	Backup Police Hourly Hourly Daily Daily 4x/day Daily	Last Full = 73.9 GB 39.7 GB 34.6 GB 9.2 GB 8.9 GB 30.5 GB	Last Backup ↔ 24 minutes ago 26 minutes ago 4 days ago 4 days ago 4 days ago 5 days ago	WTFSSMT	Last Backup Copy >	WTFSSMT WTFSSMT WTFSSMT WTFSSMT WTFSSMT		ast Certified > > > > > > > > > > > > > > > > > > >

#### Backup policy descriptions

- Daily A backup is taken once a day.
- Hourly A backup is taken each hour.
- Bihourly A backup is taken 12 times a day, at 2-hour intervals.
- 4x/day A backup is taken 4 times a day, at 6-hour intervals.
- Weekly A backup is taken once a week.
- Blank space The asset is not protected by a backup policy.
- Appliance UI The asset is protected by a backup job that was created by using the Unitrends appliance UI. You must use the appliance UI to manage the asset's backup policy (by modifying its Unitrends backup job).
- Custom The asset is protected by a backup job that was modified by using the Unitrends appliance UI. You must use the appliance UI to manage the asset's backup policy (by modifying its Unitrends backup job).

Notes:



- Backup policies are supported only for Windows image-level assets or VMware VMs that are protected with host-level backups.
- You can use the appliance UI to remove the asset from any Unitrends jobs, then set a backup policy for the asset in UniView. Upon removing the asset from the Unitrends job, it can take some time (typically 30 minutes) to update the asset's policy in UniView. Wait until the Backup Policy changes to blank space in UniView before attempting to set a backup policy for the asset.
- For Windows image-level assets and VMware VMs, we recommend setting a policy in UniView for easier management unless you need to use advanced settings (e.g., exclusion lists and inclusion lists).

## To select assets for backup policies

Checkboxes enable you to quickly set or remove backup policies for multiple Windows image-level assets and VMware virtual machines in a single operation.

Once you have selected your assets, run the "To set a backup policy" or "To remove a backup policy" procedure to set or remove the backup policy for these assets.

#### Notes:

• You can add assets from multiple pages to a single policy (use the scroll arrows below to view more pages).

	V Dashboard P	Protect Jobs	Organizations					ණ 😤 👩 (	odbaaratti Caaritteaa
rotect									
<b>T</b> Spanning Li	icenses 🛈								
	118   🔁 13								
Remaining	-118   🖻 -13								
Purchased	0   🖻 0								
Appliances	Assets Microsoft 3	65 Google	Workspace	Salesforce	Microsoft A	zure			
Scope	Organization		Appliance		Туре	Asset	Name		Descert
All	~ All	~	All	~	All	~		Q	Failures
					All	~		Q	Failures Legend ()
		emove Backup Polic Appliance \$			All Last Backup ÷	✓ Recent Backups ① ≑	Last Backup Copy 🖨	Q Recent Backup Copies	Failures Legend (i)
35 selected   @	🖉 Set Backup Policy <sub>  Re</sub>	emove Backup Polic	cy				Last Backup Copy 🌣		Failures Legend (i)
35 selected   (2	Set Backup Policy Name = uvm-state = ss- rud=tate = rot2 auto-centos	emove Backup Polic Appliance ≎ uvje-	Backup Policy	Last Full ≎	Last Backup 🗢 38 minutes	Recent Backups ① ≎ FSSMTWT	Last Backup Copy ÷	Recent Backup Copies	Failures Legend (i)
35 selected   @ □ Type ≎ ☑ ∰ ◎ ♥	Set Backup Policy Name = uvm-e: rud-::	emove Backup Polic Appliance ≎ uv je- stress	Backup Policy	Last Full ≎ 12.9 GB	Last Backup ♀ 38 minutes ago	Recent Backups ③ ≑ FSSMTWT FSSMTWT		Recent Backup Copies	Failures Legend (i)
35 selected   (g	Set Backup Policy  Re Name = UVm-c Ss- rud <sup>NH</sup> Ss- rud <sup>NH</sup> Checkbox is disabled for this AHV virtual machine  F 15	emove Backup Polic Appliance • uv je- strcos ub-"0 vmware-ub-	Backup Policy	Last Full ≎ 12.9 GB 6.2 GB	Last Backup ÷ 38 minutes ago an hour ago	Recent Backups ① ≎           F S S M T W T           F S S M T W T           F S S M T W T	11 days ago	Recent Backup Copies F S S M T W T F S S M T W T	Failures Legend (i)
35 selected   (g	Set Backup Policy  Re Name  Uvm-s' Ss- rud'**  auto-centos  Checkbox is disabled for this AHV virtual machine  F 15 ance Tp	Appliance = uvge- strous ub=10 vmware-ub- -9-52 recovery-	Backup Policy	Last Full ⇒ 12.9 GB 6.2 GB 24.7 GB	Last Backup = 38 minutes ago an hour ago 6 hours ago	Recent Backups • •           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T           F S S M T W T	11 days ago	F S S M T W T         F S S M T W T         F S S M T W T         F S S M T W T         F S S M T W T	Failures Legend (i)

• To clear your selections on all pages, reload the page.

View other pages to add more assets to the policy:

	<b>v</b> m	aj /ddk-53	recovery- 10024	T W T F S S M T W T F S S M	ł
<ul><li>50</li></ul>	∽ per page	5 of 65 pages	$\langle \rangle$		
	mber to jump ssets page		to scroll through ges of Assets	G	<b>)</b>

## To set a backup policy

Use this procedure to create a backup policy and apply it to one or more Windows image-level assets and VMware virtual machines.

**Note:** If the asset already has a backup policy, this procedure updates the policy settings.

- 1 In the Protect > Assets view, check boxes to select the assets to which the policy will be applied. You can add assets from multiple pages to a single policy (use the scroll arrows below to view more pages). To clear your selections on all pages, reload the page.
  - Note: Backup policies are supported only for Windows image-level assets or VMware VMs that are protected with host-level backups. Do not select other asset types (see "To select assets for backup policies" above).
- 2 Click Set Backup Policy.
- 3 In the Set Backup Policy dialog, select the following:
  - Backup Schedule Select a frequency from the list. (For details, see "Backup policy descriptions".)

Note: The asset's first backup is a full, which takes more time to run than subsequent incrementals. Adjust the backup frequency as needed once you have taken some incrementals.

- (Optional) Exclude Weekends Click to enable the toggle.
- Schedule Backups Click 🗂 to select a start date, click 🕓 to select a start time.

**Note:** The policy's start date and time use the timezone of the Unitrends appliance.

4 Click Save.



	t								Set Backup Polic	у		
<mark>ர</mark> ் Sp	anning Licens								Backup Schedule			
-, .	128	-							Daily			
Assigned Remaining		99							The exact time that yo and system scheduling			
Purchased		0							here.	g. Read more	3	Jules wo
rurchased	. E 0								Exclude Week	ends Sele	ect frequency a	nd .
Appliar		sets Microsoft 3	Coordo	Workspace	Salesforce	Microsoft Az			Schedule Backups		tart date & time	
Applia	ices Ass	sets Microsoft 3	55 Google	workspace	Salestorce	MICROSOTT AZ	lite		03/25/2024	Ö	11:10 AM	
Scope		Organization		Appliance		Туре		Asset Name	00,20,2021	0		
All		~ All	~	uvm-:	s-215tgqmj	~ All	$\sim$	api			Cancel	Save
			nove Backup Policy	y 🕞 Remove							4	
1 selecte	_	Backup Policy <sub> O</sub> Ren Iame <del>\$</del>	Appliance \$	Backup Policy	Last Full 🗘 🛛 L	ast Backup ≑	Recent Backups 🔅 🗘	Last Backu				
	Type 🌣 🛛 N			Backup Policy	Last Full 🔶 🛛 L	ast Backup ≑	Recent Backups ③ ≑	Last Backu				
•	Type $\Rightarrow$ N	lame 🗢	Appliance 🗢	Backup Policy	Last Full 🗦 🛛 L	ast Backup ≑	TWTFSSM	Last Backu				
	Type $\Rightarrow$ N ED a ED a	<b>lame≑</b> pi-s ne	Appliance =	Backup Policy	Last Full a L	ast Backup ≎	T W T F S S M	Last Backu				

While the policy is being created, you see a spinner and the asset's checkbox is disabled. Creating the policy can take some time (typically 30 minutes).

Scope		Organizati	on	Appliance		Туре	1	Asset Name		
All		~ All	~	uvm-s	215tgqmj.	~ All	~	api	Q	Failures
										Legend 🤅
o selecto	ed   🖒	Set Backup Policy	Remove Backup Poli	cy 🕞 Remove						
	Type 🗘	Name 🗢	Appliance 🗢	Backup Policy	Last Full 🗘	Last Backup 🕆	Recent Backups (1) 🗘	Last Backup Copy 🕆	Recent Backup Copies 🕕	Last Certified 🗢
							TWTFSSM		TWTFSSM	
		api-st ie	uvm-s 21							
	<b>(10</b> )	api-s ie	uvm-s				TWTFSSM		TWTFSSM	
			: :-21				••••••		•••••	
_	•		uvm -				TWTFSSM		TWTFSSM	
		api-s ie-2	s-21		Policy is					
					pending		TWTESSM		TWTESSM	
	<b>ED</b>	api-st te-2	uvm-<	0	1 3					
	-		21	Pending						

The backup policy name displays when the policy has been applied to the asset.



All selecte	:d   @	Set Backup P	Organization All Volicy <u>O Remo</u>	ve Backup Polic)	Appliance uvm-(	15tgqmj	. V All		sset Name	۵ (	Recent Failures Legend ()
	Type 🗘	Name 🗘		Appliance 🗘	Backup Policy	Last Full ≑	Last Backup 🗘	Recent Backups (1) ‡	Last Backup Copy 🕆	Recent Backup Copies 🕕	Last Certified 🗘
		api-st	ne-2	uvm-: e- si 3-21				TWTFSSM		TWTFSSM	
		api-s	ne	uvm-:e- s's-21		Policy is		T W T F S S M		TWTFSSM	
		api-s	ne-2	uvmge- stillis-21	Daily	applied		T W T F S S M		TWTFSSM	
		api-s	e-me	uvm-s e- s s-21				T W T F S S M		TWTFSSM	

## To remove a backup policy

Use this procedure to remove a backup policy from one or more assets.

Note: To temporarily pause an asset's backups, see this procedure: "Disabling or enabling a job schedule".

1 In the Protect > Assets view, check boxes to select one or more assets. You can select assets on multiple pages (use the scroll arrows below to view more pages). To clear your selections on all pages, reload the page.

**Note:** You cannot select an asset with the *Appliance UI* policy. The asset is protected by a backup job that was created by using the Unitrends appliance UI. You must use the appliance UI to manage the asset's backup policy (by modifying its Unitrends backup job).

- 2 Click Remove Backup Policy.
- 3 Click **Remove** to confirm.



Release 2.50 | April 2024

UNIVIEW Dashboard Protect Jobs Organizations	têj: 🗳 🌖 di 🔤 sitre 📧
Protect	
ຖ້ Spanning Licenses 🕧	
Assigned 🗄 118   🖻 13	
Remaining 📱 -118   🖻 -13	
Purchased 🚺 0   🔽 0	
Appliances Assets Microsoft 365 Google Workspace Salesforce Mic	rosoft Azure
Scope Organization Appliance T	rpe Asset Name
All v pv All v	All vn 125 Q Recent Failures
	Legend ()
1 selected   🖉 Set Backup Policy \ominus Remove Backup Policy-2 nove	
Type	Recent Backups 🛈 🕆 🛛 Last Backup Copy 🕆 🛛 Recent Backup Copies 🕕 Last Certified 🕆
	T F S S M T W T F S S M T W
	TESSMTW
Confirm Remove Backup Policy	× ••••••
50 v per page 1	
By pressing Remove you will delete the backup policies from these assets:	
• uvr ie-k 25	
	8
	Cancel Remove

While the policy is being removed, you see a spinner and the asset's checkbox is disabled. Removing the policy can take some time (typically 30 minutes).

Appliances	Assets	Microsoft 365	Google Works	space Salesforce	Microsoft Azure			
cope All	~	Organization All	Appliar V uvr	ince ipq ~	Type All	Asset Name		Q Recent Failures Legend
selected	🖉 Set Backup P	olicy 🕞 Remove E	Backup Policy 🕞	) Remove				Logona
selected		Appliance \$		) Remove Last Full ÷ Last Backup ÷	Recent Backups ① 🗘	Last Backup Copy 🗦	Recent Backup Copies 🕕	Last Certified \$

Blank space displays when the policy has been removed.

Appliances	Assets	Microsoft 365	Google Workspace	Salesforce	Microsoft Azure			
Scope All	~	Organization All	Appliance	v pq;	Type All	Asset Name	(	Recent Failures
0 selected	🖉 Set Backup Po	olicy \ominus Remove E	Backup Policy 🕞 Remo	ove				Legend 🤇
0 selected   Type \$		Appliance \$	Backup Policy $\bigcirc$ Remo Backup Policy Last F		Recent Backups () 🗘	Last Backup Copy 🗦	Recent Backup Copies 🕃	Legend C



# Working with VSA 9 Agents

If you have added a VSA 9 integration to your UniView Portal, VSA agent information displays in the VSA view when you launch the UniView module in the VSA interface. (The VSA view does not display when logged in directly to the standalone UniView Portal. For details on adding a VSA 9 integration, see "Integrating VSA 9".)

Use to view summary and status information about the VSA 9 agents installed on Unitrends appliances. To access the VSA view, click **Protect > VSA**:

JNIVIE	ΞVV	Dashboar	d Protect	Jobs	Organizations	¢	<mark>62</mark>	?	odba itre	ĸ
Protect				1						
ា Spann	ing Licens	ses 🚯								
Assigned	Ξ 0	0 🗆 ا								
Remaining Purchased	10 10	🖻 0								
Appliance	es	Assets	VSA	2						

See these topics for details on working in the VSA view:

Note: These procedures apply to VSA 9 only. Do not use these procedures for VSA 10.

- "Viewing VSA 9 agents"
- "Filtering the VSA view"
- "Mapping a VSA 9 machine to a Unitrends asset"
- "Connecting to Unitrends assets with Kaseya Live Connect"

### Viewing VSA 9 agents

On the Protect page, click VSA to switch to the VSA view. This view displays the following:

- Status VSA agent status:
  - Agent online
  - Agent online and user currently logged on
  - \delta Agent online and user currently logged on, but user not active for 10 minutes
  - Agent is currently offline
  - Agent has never checked in
  - Agent has been suspended
- VSA Agent ID The unique machine ID assigned to the VSA agent. The machine ID / group ID / organization ID is the account name for a managed machine in the VSA database. The agent is the client software installed on the managed machine. A one-to-one relationship exists between the agent on a managed machine and its account



name in the VSA. Tasks assigned to a machine ID by VSA users direct the agent's actions on the managed machine.

- VSA ID Unitrends asset ID. This displays only if the VSA machine ID has been mapped to a Unitrends asset. (For details, see "Mapping a VSA 9 machine to a Unitrends asset".)
- VSA Machine Name Name of the VSA machine where the agent is running.
- IP Addresses
- Assets

NIVIE	∃W Dashboard	Protect Jobs Organizations	ي 🕃 🤔 🧑 🕒 db الم
Protect			
<mark>⊤</mark> 7 Spann	ing Licenses 🕕		
Assigned	I 0   🗖 0		
Remaining	E 0   🖻 0		
Purchased	<b>፤</b> 0		
Appliance	es Assets VSA	_	
SA Machine N	lame	View Org/Machine Group	
		Q All ~ All ~	
Status	VSA Agent ID	VSA Machine Name 🗢 Ip Addresses	Assets
	0(10(000(1001(7		
	861263286120167	19 Dt.kserver	0 :
	269424728869187	19 Dt.kserver 2019se erver	0 <b>:</b> 0 <b>:</b>
•			· · · · · ·
•	269424728869187	2019se erver	0 :
• • • •	269424728869187 424295965201305	2019se erver desktor	0 : 0 :
• • • •	269424728869187 424295965201305 284632086869212	2019se erver desktor t.kserver desktor t.kserver	0 : 0 : 0 : 0 :

## Filtering the VSA view

The VSA view displays all VSA 9 machines that have been added to your backup.net instance and are running the VSA agent.

To filter the display, enter filter criteria in any of the following:

- VSA Machine Name Enter a text string, then press **Enter** to apply. VSA machine names containing the text you entered display.
- View Select a view from the list. (Select All to clear the view filter.)
- Org/Machine Group Select an organization or machine group from the list. (Select All to clear the filter.)



INIVIEW Dashboa	ard Protect Jobs Organiz	ations	😥 🗳 🧭 db 👘 litre
Protect			
្ត្រី Spanning Licenses ្រ			
Assigned 🚺 0   🖻 0			
Remaining 🚺 0   🛅 0			
Purchased 🗵 0   🗖 0			
Appliances Assets	VSA		
SA Machine Name	View	Org/Machine Group	
	Q All	$\sim$ All $\sim$	
Status VSA Agent ID	Enter filter criteria	lp Addresses	Assets

#### Mapping a VSA 9 machine to a Unitrends asset

You can map a VSA machine to a Unitrends asset to easily identify VSA machines in your UniView Portal environment. To create a mapping:

- 1 In the Protect > VSA view, click the machine's and select **Map to Unitrends Asset**.
- 2 Click the asset's and select Map to Asset.



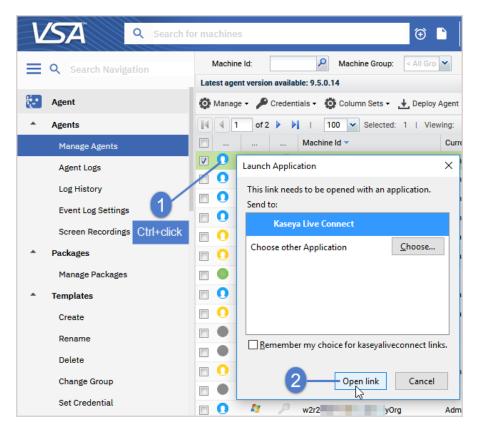
A Mac	hine Name			View	0	rg/Machine Group		
- Mac						· .		
			Q	All		All set is mapped	$\sim$	
							1 - 9 of 9	< .
Status	VSA Agent ID			VSA Machine Na	me If	Addresses	Assets	
	kaseya <b>vın 10</b> t	heli.istano	lard	Deblan7_5				1
	utmmr inn i.root.	Map U	nitrends asset t	o kaseyavın 10	t. In dim to ndar	rd 🗙	Live Co	nnect Unitrends Asse
	valentinemechine				1 - 50 of 91	< >		:
	valentinemuchine	os	Name Debian7_5		3			:
0	valentinermachir	۵	RHEL_8		Select an asset	Map to Asset		:
	win-35ejeq4qr9i.	٥	Ubuntu18		an asset	÷		:
•	win-ef#f1ceif2r.rd	۵	CentOS8			1		:
	win-1772222.86	•	A_VSS_EXC-2010			÷		:
	win10vm ben.roc	0	NAS-NFS-NAS-RRC A_VSS_SQL2017					:
		6	A_VSS_SQL2005					

#### Connecting to Unitrends assets with Kaseya Live Connect

Use these steps to remote into the asset using Live Connect.

- 1 Install Live Connect on your workstation. (Skip this step if Live Connect has already been installed). To install Live Connect:
  - Log in to VSA 9 from your workstation.
  - On the Agent > Agents > Manage Agents page, **Ctrl+click** an agent icon.
  - You are prompted to download and install the Live Connect application on your local computer.





- 2 Log in to the UniView Portal.
- 3 In the Protect > VSA view, click the machine's and select Live Connect.
- 4 Live Connect establishes a remote connection to the machine.



Protect <td< th=""><th></th></td<>	
Assigned $\begin{bmatrix} 1 & 0 &   & \hline 0 &   \\ Remaining & \begin{bmatrix} 1 & 0 &   & \hline 0 &   \\ \hline 0 &   & \hline 0 &   \\ Purchased & \begin{bmatrix} 1 & 0 &   & \hline 0 &   \\ \hline 0 &   & \hline 0 &   \\ \hline \end{array}$	
Appliances Assets VSA	
VSA Machine Name View Org/Machine Group           VSA Machine Name         View         Org/Machine Group           Q         All         ✓	~
Q All ~ All	~
	>
Status VSA Agent ID VSA Machine Name IP Addresses Assets	
NAS-NFS-NAS-RRC     -199-17     Saseya Live Connect utmsp-vsa.dev/aseya.net / utmsp-vsa.dev	1
Live Connect	
Asset Info (Offline)	t —
Computer Information • C =	
Field Value	ł
ComputerName kaseyavm10 2 Live Connect establishes a remote connection	1
СриТуре	
CurrentUser	
DomainWorkgroup localdomain (d)	1
OSinfo RecoveryOS release 7.6.1810 (Core)	1
OSType Linux	
RamMBytes 3881	



# Working with Spanning Backup

If you are running Spanning backups, you can integrate your Microsoft 365 tenants, Google Workspace domains, and Salesforce organizations to manage your backups right from the Protect page in the UniView Portal.

	Protect Jobs Organizations	🔯 🗒 🧭 od abaaanaa 🛛 🙀
Protect	Click here	+ Add Customer

The Protect page includes these Spanning views:

- Microsoft 365 Displays Spanning Backup for Microsoft 365 data for tenants that have been integrated with the UniView Portal. Use to:
  - Manage tenant/organization mappings. (Mapping a tenant to a UniView Portal organization enables BackuplQ to generate backup alerts for the domain. For details, see "Alerts for Spanning Microsoft 365 backup".)
  - Allocate licenses
  - Upgrade from a Spanning trial to a paid subscription
  - View license information, storage information, and the status of each tenant's recent backups
- Google Workspace Displays Spanning Backup for Google Workspace data for domains that have been integrated with the UniView Portal. Use to:
  - Manage domain/organization mappings. (Mapping a domain to a UniView Portal organization enables BackuplQ to generate backup alerts for the domain. For details, see "Alerts for Spanning Google Workspace backup".)
  - Allocate licenses
  - Upgrade from a Spanning trial to a paid subscription
  - View license information, storage information, and the status of each domain's recent backups
- Salesforce Displays Spanning Backup for Salesforce data for organizations that have been integrated with the UniView Portal. Use to manage organization mappings and to view license information, storage information, and the status of each organization's recent backups. (Mapping a Salesforce organization to a UniView organization enables BackupIQ to generate backup alerts. For details, see "Alerts for Spanning Salesforce backup".)

See these topics for details:

- "Working with Microsoft 365"
- "Working with Google Workspace"
- "Working with Salesforce"



## Working with Microsoft 365

If you are using Spanning Backup for Microsoft 365, integrate your Microsoft 365 tenant to manage tenant/organization mappings, check the status of the tenant's recent backups, receive alerts for failed or partial backups, allocate licenses, upgrade from a Spanning trial to a paid subscription, and view license and storage information — right from UniView.

Start by adding the integration as described in "Integrating a Microsoft 365 tenant". Once the tenant has been added, information is synced from Spanning Backup each night. Use the Microsoft 365 view to work with this data, as described in "Working with the Microsoft 365 view".

#### Integrating a Microsoft 365 tenant

This procedure requires the following:

- A UniView account with superuser or administrator privileges
- A Microsoft 365 account with Global Admin privileges

**Note:** If you do not have Global Admin privileges, use this procedure to start the integration. Use the **Copy Invite Link** option to send the Global Admin a link they can use to complete the integration procedure.

#### To add the integration

- **1** Log in to the UniView Portal with a superuser or administrator account.
- 2 On the Protect page, click **Microsoft 365**.
- 3 Click Add Customer.

	ard Protect Jobs Organizations	🔞 🖉 🧑 🔵 dbaaa unitre ĸ
Protect		2 Add Customer
ក្' Spanning Licenses 🛈		
Assigned 🚺 128   😇 99		
Remaining 🚺 -128   😇 -99		
Purchased 🚺 0   🖻 0		
Appliances Assets Mi Domain Name	crosoft 365 Google Workspace Salesforce Microsoft Azure	الله 🖉 🕹 🖉 Last 30 Backups
	No Domains	
	Looks like you don't have any Domains connected	

- 4 Select an Organization from the list.
- 5 Select the Microsoft 365 platform.
- 6 Do one of the following:



- If you have Global Admin credentials, click **Add** and continue with this procedure to complete the integration.
- If you do not have Global Admin credentials, click **Copy Invite Link**. Then email the link to the Global Admin so that they can complete the integration.

Add Customer	×
Add a customer or provide an invite link for your customer to complete the installation process.	
Organization sync is enabled. If you don't see a pre-existing organ in the list below, please make sure it exists at the source and is sy UniView.	
Organization * 212 Bronx 1	
Microsoft 3652	
<ul> <li>Google Workspace</li> </ul>	
⊖ Salesforce	
<ul> <li>Salesforce Sandbox</li> <li>3</li> </ul>	
Copy Invite Link Cance	Add

7 Enter your Microsoft 365 Global Admin credentials.





Next

Microsoft	
← admor@Kaw.onmicrosoft.com	
Enter password	
Forgot my password	
Sign in	

Microsoft

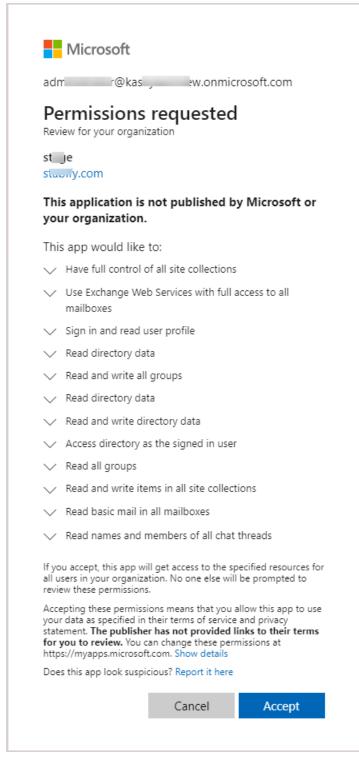
No account? Create one! Can't access your account?

ୠ Sign-in options

Sign in

8 Click Accept to authorize access to your Microsoft 365 tenant.





9 The tenant is added and displays in the Microsoft 365 view:



INIVIEV	$\sim$	Dashboard	Protect	Jobs Orga	anizations								ම	<u>9</u>	?	🔵 dbi	unitre	
Protect																+	Add Customer	
ਰ <sup>*</sup> Spanning L	Licenses 🔅																	
Assigned	128	<b>9</b> 9																
Remaining	-128	<b>-99</b>																
Purchased	0	<b>=</b> 0																
Appliances	Assets	Microsof	ft 365	Google Work	space	Salesforce	Microsoft Azure											
Domain Name ≑	Org	ganization 🗢	Lie	censes	Expiration	Users Coverage	Storage	4	<u>s</u> 0	÷	≙	C	Last 30 Ba	ckups				
Pinkston Farms		2 Bronx 🕑 ant is integrate	-	_  _	-		6 - 9 -	 -		_	-	-					C	

**10** Data is synced nightly from Spanning Backup to the UniView Portal. For details about this data, see "Working with the Microsoft 365 view".

#### Working with the Microsoft 365 view

After you have integrated your Microsoft 365 tenant, use the Protect > Microsoft 365 view to manage tenant/organization mappings, view license and storage information, allocate licenses, and check the status of a tenant's recent backups.

See these procedures for details:

- "To view Microsoft 365 information"
- "To manage organization mappings"
- "To allocate Microsoft 365 licenses"
- "To upgrade from a Spanning Microsoft 365 trial to a paid subscription"

#### To view Microsoft 365 information

The following information displays in the Microsoft 365 view:

- Spanning Licenses tile Shows the total number of Spanning licenses assigned, remaining, and purchased. Counts include licenses from all Spanning Backup products.
  - Assigned The number of standard licenses (<sup>1</sup>) and archived licenses (<sup>1</sup>) that have been assigned to users.
  - Remaining The number of standard licenses (<sup>1</sup>) and archived licenses (<sup>1</sup>) that have not yet been assigned to a user.
  - Purchased The total number of Spanning Backup standard licenses (<sup>1</sup>) and archived licenses (<sup>1</sup>) that have been purchased.
  - **Note:** Licenses must be purchased through Spanning Backup. The UniView Portal pooled licensing feature enables you to manage how your licenses are allocated. To reallocate licenses, simply remove them from one tenant and add them to another (see "To allocate Microsoft 365 licenses").



- Data center icon Location of the tenant's Spanning data center. For example, us for United States.
- Domain Name Name of the Microsoft 365 tenant.
- Organization UniView Portal organization mapped to the tenant.
  - None indicates no organization has been mapped. To enable BackupIQ alerts for the tenant, click 🗹 and select an organization.
  - To update the mapping, simply click C and select a different organization.
  - To remove the mapping and disable BackuplQ alerts for the tenant, click 🗹 and select X.
- Licenses The number of standard licenses (≦) and archived licenses (□) that have been allocated to the tenant.
   To add or remove standard or archived licenses, modify this number by clicking 2 and entering a new value.

**Note:** When adding or removing licenses it can take some time for the new value to populate in UniView and Spanning. You cannot modify another license value until the current operation is complete.

- Expiration License expiration date.
- User Coverage The total number of licensed users divided by the total number of users in the domain.
- Storage Amount of storage used. Is the amount of raw data that has been downloaded from the cloud, site actual amount of local storage used after compression.
- Status of the tenant's recent Mail Backups: of for all backups over the last 7 days were successful, × for one or more backups over the last 7 days has failed, of for one or more backups over the last 7 days was partially completed, for no backups exist.
- Email Status of the tenant's recent Calendar Backups: of for all backups over the last 7 days were successful, 
   for one or more backups over the last 7 days has failed, of for one or more backups over the last 7 days was partially completed, for no backups exist.
- At a Status of the tenant's recent Contact Backups: of for all backups over the last 7 days were successful, for one or more backups over the last 7 days has failed, of for one or more backups over the last 7 days was partially completed, for no backups exist.
- Status of the tenant's recent Drive Backups: I for all backups over the last 7 days were successful, X for one or more backups over the last 7 days has failed, I for one or more backups over the last 7 days was partially completed, for no backups exist.
- Status of the tenant's recent SharePoint Backups: S for all backups over the last 7 days were successful, K for one or more backups over the last 7 days has failed, for one or more backups over the last 7 days was partially completed, for no backups exist.
- Image: Status of the tenant's recent Teams Channel Backups: for all backups over the last 7 days were successful, X for one or more backups over the last 7 days has failed, for one or more backups over the last 7 days was partially completed, for no backups exist.
- 🛆 Error Only Email status. Ů indicates Error Only Email is enabled, ¹ indicates Error Only Email is disabled.
- 📧 KaseyaOne status. Ů indicates KaseyaOne is enabled, 🕛 indicates KaseyaOne is disabled.



- Last Backups Status of the tenant's last backup, by day. Displays status icons for the last 30 days:
  - Indicates that the last backup on this day was successful. Hover to view the date and number of problems.
  - indicates that the last backup on this day was partially completed. Hover to view the date and number of problems.
  - indicates that the last backup on this day failed. Hover to view the date and number of problems.
  - Indicates that there are no backups. Hover to view the date.
- Click to connect to Spanning Backup for Microsoft 365, where you can view error details on the Problems page. (For details, see the Spanning Backup for Microsoft 365 Admin Guide.)

#### Notes:

- This button does not display for Monitor role users. For more on user roles, see "About UniView Portal user accounts".
- If you have Superuser, Admin, or Manage credentials and do not see this button, the feature has not been enabled in your environment.
- You can connect to only one Microsoft 365 tenant at a time.

JNIVIEW	Dashboard	Protect Jobs	Organizations										¢	<u>@</u>	?	) 🔵 dbj		re
Protect																+	Add Cus	tomer
ា Spanning Licenses	<b>3</b> (j)																	
Assigned 21000	100																	
Remaining 20	110																	
Purchased 21020	210																	
Appliances Asse	ts Microsoft	365 Google	Workspace	Salesforce	Microsoft A													
Domain Name ≑	Organization 🗘		Licenses		lover to view desc Users Coverage			<b>—</b>	-	0	1	A 0	2 1	.ast 30	Backup	os		
📧 2P 🤺 ska - Buahun	None 🖉	Click to map organization	L - -	9/6/25	1154%	S 52.4 MB	ail Back	• 0			<ul> <li></li></ul>	<u>t</u> (	5					ß
Big hbers	Amsterdam Artisans	C	📕 17777 🗭 💳 —	9/6/25	Spanni 115 Size (C	ng Storage ompressed) 93.1 GB	0	•		R	0					osoft 365		☑ Manage
Brown and Sons	Autotask Corporation	C	≝ च		odify number of es allocated	0 - 9 -	-		-	-	-	00	ן פ					Y.
	04.4	c.A.	m 1 m			-				_	_	4. 4	5 1					F2
Kaseya Uniview 1	01Allemo	C	1 C 85 C	9/18/24	0%	& - 9 -	-		_	_								
1	BenePartum Law Group Sandbox	· C		9/18/24 12/30/2 3	50 <sup>°</sup> Protect Size	ed Storage	×	 × ×	×	-	-	Ģ	e B 4 Pro		Partiall	y Successfu		
	BenePartum Law		<ul><li>≅ 85 Ø</li><li>₤ 2 Ø</li></ul>	12/30/2	50 <sup>°</sup> Protect Size	8 -	- ×	× × © ©	×		-	Ģ	<ul> <li>B</li> <li>4 Pro</li> <li>Frida</li> </ul>	a <b>ckup I</b> oblems ay, Jul 2	Partiall	y Successfu		Hover t detail C



#### To manage organization mappings

To enable BackuplQ alerts, the tenant must be mapped to a UniView Portal organization. Use this procedure to manage these mappings.

- 1 In the Microsoft 365 view, locate the tenant whose mapping you want to add, modify, or remove.
  - The tenant name displays in the Domain column.
  - The Organization column contains either the name of the organization that has been mapped to this tenant or *None* if no organization has been mapped.
- 2 In the Organization column, click 🗹 next to the organization name and do one of the following:
  - To add a mapping and enable BackupIQ alerts for the tenant, select an organization from the list.
  - To modify the mapping, simply select a different organization from the list.
  - To remove the mapping and disable BackuplQ alerts for the tenant, select X.

	Dashboard	Protect Jobs	Organizations	
Protect				
<b>ງ</b> ້ Spanning Lic	censes (j			
Assigned	21000   🖻 100			
Remaining	20   🖻 110			
Purchased 🗵 2	21020 🛛 🖻 210			
Appliances	Assets Microso	ft 365 Googl	e Workspace	Salesforce
Domain Name ≑	Organization ≑		Licenses	Expiration
💴 2P 📩 ska - Be	ahan None 🖉	Click to map organization	<b>I</b> —	9/6/25
	Choose an organiz 🗸			
us Big nbers	Barton - Raynor	C	🗵 17777 🕑 📼 –	9/6/25
Brown and Sons	Bashirian Inc	Click to	modify mapping	7/26/22
Brown and Sons	Autotask Cor X V			//20/22
📧 Kaseya UniView	Auer - MuJm	ď	I 1 🖉	9/18/24
1 1	Autoclose Client		🖻 85 🗭	
us Mi ibs	Autotask	1 C	■ 2 🗹	12/30/2
	Corporation		□ 3 🖄	3
Pinkston Farms		Click to remove	mapping 🖇	2/28/29
T nain	212 Bronx X		■ 2 🖒	7/26/22
nam	None 🖻		🖻 3 🗹	1120122



#### To allocate Microsoft 365 licenses

In the Microsoft 365 view, you can easily add licenses to or remove licenses from a tenant by editing the number of Standard Licenses or Archived Licenses. You can also reallocate Spanning licenses by removing licenses from one tenant and adding them to another. The changes you make are synced to the licensing tiles in Spanning Backup for Microsoft 365.

**Note:** Licenses must be purchased through Spanning Backup. The UniView Portal pooled licensing feature enables you to manage how your licenses are allocated only.

The following steps show how to reallocate licenses. In our example, we will remove 5 licenses from tenant *Pinkston Farms* and add them to tenant *Mister Crabs*.

**1** Tenant *Pinkston Farms* has 25 standard licenses. Tenant *Mister Crabs* has 3 standard licenses.

INIVIEW	Dashboard Protect	Jobs Organizations			® 🖁 🧖	db; nitre
Protect						+ Add Customer
រា Spanning Licenses ្យ						
Assigned 21000	<b>100</b>					
Remaining 🚺 20	<b>110</b>					
Purchased 21020	210					
Appliances Assets	Microsoft 365	Google Workspace	Salesforce Microsoft Azure			
Domain Name 🗢	Organization 🗢	Licenses Expirati	on Users Coverage Storage	S 🗎 <u>2</u> 客 🗘 🕸 A	C Last 30 Backups	1
Mister Crabs	Crown Coffee 🕜		ant standard \$52.4 MB		ి 🚺	
Pinkston Farms	212 Bronx 🗹	25		00000000000000000000000000000000000000	٥	

2 For tenant *Pinkson Farms*, click *(*, change the number of standard licenses to 20, and click *(* to save.

Л	IVIEW	Dashboard Protect	Jobs Organ	izations							ŝ	<u></u>	?	🔵 dt	DE	hitre
Pro	tect													+	Add Cus	stomer
จ	Spanning Licenses 🕃	)														
Assi	igned 🗄 21000	<b>100</b>														
Rem	naining 🗈 20	<b>110</b>														
Purc	chased 🚺 21020	210														
	ppliances Assets nain Name 🕈	Microsoft 365	Google Worksp	bace Salesforce	Microsoft Azure		<b>ä</b> <u>*</u>	•	¢ Ø	A	e	Last 30 I	Backups			
Dom					overage Storage		■ ** • •			_		Last 30 I				C
	ain Name 🕈	Organization 🗢	Licenses	Expiration Users Co	Storage           %         & 85.5 MB           © 52.4 MB	×		×		•	Ċ					C



3 For tenant *Mister Crabs*, click *C*, change the number of standard licenses to 8, and click *c* to save.

JNIVIE	EW	Dashboar	d Protect	Jobs Orga	nizations									Ę	þ 😃	?	db:	nitre
Protect																	+ Add Cus	stomer
<b>ງ</b> Spanni	ng Licenses	<b>i</b>																
Assigned	21000	100																
Remaining	<b>1</b> 20	🔁 110																
Purchased	21020	210																
Appliances	Asset	s Micro	soft 365	Google Works	space S	alesforce M	licrosoft Azure											
Domain Name 🗢		Organiza	tion ‡	Licenses	Expiration	Users Coveraç	e Storage	$\searrow$	<b>.</b>		<b>b</b> 0		≙	C	Last 30	) Backup	os	
Mister C	rabs	Crown (	Coffee 🕜	■ 3 🖉 +5 8	<b>1</b> 12 😡		iccessfully requested odated momentarily.	· ×		) )	< 🤇	0	¢	Φ				C
Pinkstor	Farms	212 Bro	nx 🖻 ( 3	□ 13 🗹	2/	Licenses Will be u	93.1 GB	•	9	9 (		0	Ģ	Φ				ß

4 Licenses have been reallocated:

JNIVIE	EVV	Dashboard P	rotect Jobs Orga	nizations									¢	<u>8</u>	🧑 🔵 dba	hitre
Protect															+ Add	Customer
J' Spanni	ng Licenses 🔅															
Assigned	21000	<b>100</b>														
Remaining	20	<b>110</b>														
Purchased	21020	<b>210</b>														
Appliances	Assets	Microsoft 36	5 Google Works	space Sales	sforce Micro	osoft Azure										
Domain Name 🕈	-	Organization \$	Licenses	Expiration	Users Coverage	Storage		1 22	4	¢	<b>1</b> 22	♪	e	Last 30 Ba	ickups	
Mister C	rabs	Crown Coffee (		12/30/23 Licenses are	reallocated	<ul><li>&amp; 85.5 MB</li><li>§ 52.4 MB</li></ul>	× <	0	×	0	<b>⊘</b>	Ċ	φ			C
Pinkstor	n Farms	212 Bronx 🗹	i 20 € □ 13 €	2/28/29	<mark>58%</mark>	▲ 88.8 PB ■ 93.1 GB	0			0		Ċ	Ċ			[] [2]

To upgrade from a Spanning Microsoft 365 trial to a paid subscription

1 In the Microsoft 365 view, locate your trial tenant.

Note: If you don't see your trial tenant, add it to UniView by running this procedure: "Integrating a Microsoft 365 tenant".



INIVIE		ashboard	Protect	Jobs Organizations									¢	ළ	?	🔵 db:	nitre
Protect																+ Add Cus	stomer
ក្' Spannin	ng Licenses 🚯																
Assigned	21000   🖻	100															
Remaining	20 🗉 🖻	110															
Purchased	21020   🖻	210															
Appliances	Assets	Microsof	t 365	Google Workspace	Salesforce Micro	soft Azure											
Domain Name 🗢	Organizati	on 🗧 🛛 Li	censes	Virtual Licenses These licenses are related to the 1	Users Coverage	Storage		*	4	φ	Ø× .	^ €	: L	ast 30 B	ackups		
Brown and	Sons Autotask Corporati Trial lic			subscription. Trial Licenses are lin to only 100, and cannot be deduct from. Edit this field in order to upg	ted 50%	<ul> <li>85.5 MB</li> <li>52.4 MB</li> </ul>	× 🤇	0	×		9	e e					Ľ
Pinkston Factor		x 🖉 📔	25 CC	to the Paid subscription.	<mark>58%</mark>	▲ 88.8 PB	00	0	0		9	99	)				ß

- 2 In the Licenses column, click  $\mathbb{Z}$ , change the number of standard licenses, and click  $\mathbb{Z}$  to save.
  - Note: When you click  $\mathcal{O}$ , the number of licenses that were assigned to users during the trial displays. You can accept this value or enter another value. Your paid subscription is created with this number of standard licenses.

JNIVIE	W	Dashboa	rd Prot	tect Jobs	Organizations									ŵ	3 🚇	?	🔵 dba	nitre
Protect																	+ Add C	ustomer
<b>ງ</b> Spanning	g Licenses	<b>i</b>																
Assigned	21000	100																
Remaining	20	110																
Purchased	21020	210																
Appliances	Asset	s Micro	osoft 365	Google	Workspace	Salesforce Micro	osoft Azure											
Domain Name 🗢		Organization	1÷	Licenses	Expiration	Users Coverage	Storage		1 4	•	φ		≙	e	Last 30	Backups	5	
Brown and S	Sons	Autotask Corporatio	ළ n	📕 100 🕀 🖉 –	12/30/23	<mark>50</mark> %	🚯 85.5 MB	×	0	×	0	0	¢	Φ				ß
Pinkston Fa	irms	212 Bronx	c 3		2 28/	License change succe Licenses will be updat		×	) 📀	Ø	0	0	Ģ	Φ				ß

**3** Your trial is upgraded to a paid subscription.



	Dashboard	Protect Jobs	Organizations								ŵ	3 🚇	?	ן db	nitre
Protect														+ Add Cust	tomer
្តា' Spanning Lice	nses 🚯														
Assigned 🚺 2 <sup>°</sup>	0   🖻 100														
Remaining 🚺 2	<b>110</b>														
Purchased 2	0   🖻 210														
Appliances A	ssets Microsoft	365 Google	Workspace Sale	esforce Micro	osoft Azure										
Domain Name 🕈	Organization 🖨	Licenses	Expiration	Users Coverage	Storage		**	<b>a</b> 0		♪	e	Last 30 B	ackups		
Brown and Sons	Autotask Corporation Tenant is upgrad		12/30/23 of licenses	<mark>50</mark> %	▲ 85.5 MB ■ 52.4 MB	×	0	×	0	¢	Ģ				ß
Pinkston Farms	to paid subscript		urchased <mark>29</mark>	<mark>58%</mark>	<b>88.8 PB</b>	00	$\bigcirc$	00		Ģ	Ċ				ß

On the Manage Licenses page in Spanning Backup for Microsoft 365, the tenant now displays as a paid tenant. The number of standard licenses you entered above displays in the Standard Licenses tile, in the Purchased license count:

								¢	? ₽
은 Users Manage Licenses	•	Manage Li	censes:	Brown and S	Sons Pa	id Trial h upgrad	as been ed to Paid	ঠ্টে Activate Licenses	+ Purchase Licenses
ൿ SharePoint	÷.								
🗗 Teams	÷	<b>—</b>			~	9-9			
😸 Dark Web		Standard L	icenses (i)	Archived Lic	enses (i)	<sup>୧</sup> ୦ <sup>୧</sup> Users			
-/- Activity		Assigned	1	Assigned	0	Members	1		
🕲 Backup History		Remaining	10	Remaining	0	Guests	0		
① Problems		Purchased	11	Purchased	0				
🕲 Settings									

## Working with Google Workspace

If you are using Spanning Backup for Google Workspace, integrate your Google Workspace domain to manage domain/organization mappings, check the status of the domain's recent backups, receive alerts for failed or partial backups, allocate licenses, upgrade from a Spanning trial to a paid subscription, and view license and storage information — right from UniView.

Start by adding the integration as described in "Integrating a Google Workspace domain". Once the domain has been added, information is synced from Spanning Backup each night. Use the Google Workspace view to work with this data, as described in "Working with the Google Workspace view".

#### Integrating a Google Workspace domain

This procedure requires the following:

- A UniView account with superuser or administrator privileges
- A Google Workspace account with Global Admin privileges



**Note:** If you do not have Global Admin privileges, use this procedure to start the integration. Use the **Copy Invite Link** option to send the Global Admin a link they can use to complete the integration procedure.

#### To add the integration

- **1** Log in to the UniView Portal with a superuser or administrator account.
- 2 On the Protect page, click **Google Workspace**.
- 3 Click Add Customer.

UNIVIEW	Dashboard Protect	Jobs Organizations	têj 👙 🧑 🔵 🚥 🚛 🔤
Protect			2 + Add Customer
<b>ຖ</b> ້ Spanning Licenses (	D		
Assigned 🚺 120	98		
Remaining 🗄 -120	98		
Purchased 🚺 0	0		
Appliances Assets	Microsoft 365	Soogle Workspace Salesforce	
Domain Name 🗢	Organization ≑	Standard Licenses Expiration Users Coverage Storage 🚍 💩 🔤	🗒 🤽 🤄 Last 30 Backups
		No Domains	
		Looks like you don't have any Domains connected	

- 4 Select an Organization from the list.
- 5 Select the **Google Workspace** platform.
- 6 Do one of the following:
  - If you have Global Admin credentials, click Add and continue with this procedure to complete the integration.
  - If you do not have Global Admin credentials, click **Copy Invite Link**. Then email the link to the Global Admin so that they can complete the integration.



Add Customer	$\times$
Add a customer or provide an invite link for your customer to complete the installation process.	
Organization sync is enabled. If you don't see a pre-existing organization in the list below, please make sure it exists at the source and is synced to UniView.	
Organization * 212 Bronx  Select Platform	
O Microsoft 365	
Google Workspace 2	
○ Salesforce	
<ul> <li>Salesforce Sandbox</li> </ul>	
Copy Invite Link Cancel Ad	d

7 Enter your Google Workspace Global Admin credentials.



G	Sign in with Google
	Choose an account to continue to spanning.co
	D D mail.com
	Joe.Scigh@spanningio.com     Use another account
	To continue, Google will share your name, email address, language preference, and profile picture with spanning.co. Before using this app, you can review spanning.co's <b>privacy policy</b> and <b>terms of service</b> .
Englisi	h (United States)
G	Sign in with Google
G	Bign in with Google Hi Joe Joe.Scome.gh@spanning(com
G	Hi Joe Joe.Scgh@spanning To continue, first verify it's you
G	Hi Joe Joe.Schullerunge J.com
G	Hi Joe Joe.Sdumuugh@spanningd_b.com To continue, first verify it's you Enter your password
G	Hi Joe Joe.Sdomogh@spanningdob.com To continue, first verify it's you Enter your password

8 Click Accept to authorize access to your Google Workspace domain.



	ermissions requested
st	je my.com
	s application is not published by or
Thi	s app would like to:
$\sim$	Have full control of all site collections
$\sim$	Use Exchange Web Services with full access to all mailboxes
$\sim$	Sign in and read user profile
$\sim$	Read directory data
$\sim$	Read and write all groups
$\sim$	Read directory data
$\sim$	Read and write directory data
$\sim$	Access directory as the signed in user
$\sim$	Read all groups
$\sim$	Read and write items in all site collections
$\sim$	Read basic mail in all mailboxes
$\sim$	Read names and members of all chat threads
alÍ u	u accept, this app will get access to the specified resources for sers in your organization. No one else will be prompted to aw these permissions.
you state <b>for</b> y	epting these permissions means that you allow this app to use r data as specified in their terms of service and privacy ement. The publisher has not provided links to their terms you to review. You can change these permissions at s:// n. Show details
Doe	s this app look suspicious? Report it here
	Cancel Accept

9 The domain is added and displays in the Google Workspace view. Data is synced nightly from Spanning Backup to the UniView Portal. For details about this data, see "Working with the Google Workspace view".



JNIVIEW	Dashboard Protect	Jobs Organizations		ŵ	👩 🔵 dbɛnitre
Protect					+ Add Customer
Remaining -120	<ul> <li>■ 98</li> <li>■ -98</li> <li>■ 0</li> </ul>		L <sub>2</sub>		
Appliances Assets	Microsoft 365	Google Workspace Salesforce	Microsoft Azure		
Domain Name 🗢	Organization ≑	Standard Licenses Exp	viration Users Coverage Storage	8 🛆 🛎 🛱 🤽 🤅 La	ast 30 Backups
Pinkston Farms	212 Bronx 🕑 Domain is integra	e	& - 2 -	11	

#### Working with the Google Workspace view

After you have integrated your Google Workspace domain, use the Protect > Google Workspace view to manage domain/organization mappings, view license and storage information, allocate licenses, upgrade from a Spanning trial to a paid subscription, and check the status of a domain's recent backups.

See these procedures for details:

- "To view Google Workspace information"
- "To manage organization mappings"
- "To allocate Google Workspace licenses"
- "To upgrade from a Spanning Google Workspace trial to a paid subscription"

#### To view Google Workspace information

The following information displays in the Google Workspace view:

• Spanning Licenses tile – Shows the total number of Spanning licenses assigned, remaining, and purchased. Counts include licenses from all Spanning Backup products.

Note: Archived licenses apply only to Spanning Backup for Microsoft 365.

- Assigned The number of standard licenses (🗉) and archived licenses (🖻) that have been assigned to users.
- Remaining The number of standard licenses (<sup>1</sup>) and archived licenses (<sup>1</sup>) that have not yet been assigned to a user.
- Purchased The total number of Spanning Backup standard licenses (<sup>1</sup>) and archived licenses (<sup>1</sup>) that have been purchased.

**Note:** Licenses must be purchased through Spanning Backup. The UniView Portal pooled licensing feature enables you to manage how your licenses are allocated. To reallocate licenses, simply remove them from one domain and add them to another (see "To allocate Google Workspace licenses").



- Data center icon Location of the domain's Spanning data center. For example, us for United States.
- Domain Name of the Google Workspace domain.
- Organization UniView Portal organization mapped to the domain.
  - None indicates that no organization has been mapped. To enable BackuplQ alerts for the domain, click 🗹 and select an organization.
  - To update the mapping, simply click C and select a different organization.
  - To remove the mapping and disable BackupIQ alerts for the domain, click @ and select X.
- Standard Licenses The number of standard licenses that have been allocated to the Google Workspace domain.
- Expiration License expiration date.
- User Coverage The total number of licensed users divided by the total number of users in the domain.
- Storage Amount of storage used. 💩 is the amount of raw data that has been downloaded from the cloud, 🛢 is the actual amount of local storage used after compression.
- E Status of the domain's recent Site Backups: of for all backups over the last 7 days were successful, × for one or more backups over the last 7 days has failed, of for one or more backups over the last 7 days was partially completed, for no backups exist.
- A Status of the domain's recent Document Backups: for all backups over the last 7 days were successful,
   X for one or more backups over the last 7 days has failed, for one or more backups over the last 7 days was partially completed, for no backups exist.
- Status of the domain's recent Mail Backups: of or all backups over the last 7 days were successful, × for one or more backups over the last 7 days has failed, of or one or more backups over the last 7 days was partially completed, for no backups exist.
- End Status of the domain's recent Calendar Backups: for all backups over the last 7 days were successful, 
   for one or more backups over the last 7 days has failed, for one or more backups over the last 7 days was partially completed, for no backups exist.
- At a Status of the domain's recent Contact Backups: for all backups over the last 7 days were successful, 
   for one or more backups over the last 7 days has failed, 
   for one or more backups over the last 7 days was partially completed, for no backups exist.
- 🥼 KaseyaOne status. 🙂 indicates KaseyaOne is enabled, 🕛 indicates KaseyaOne is disabled.
- Last Backups Status of the domain's last backup, by day. Displays status icons for the last 30 days:
  - indicates that the last backup on this day was successful. Hover to view the date and number of problems.
  - indicates that the last backup on this day was partially completed. Hover to view the date and number of problems.
  - indicates that the last backup on this day failed. Hover to view the date and number of problems.



- Indicates that there are no backups. Hover to view the date.
- Click to connect to Spanning Backup for Google Workspace, where you can view errors. (For details, see the Spanning Backup for Google Workspace Admin Guide.)

#### Notes:

- This button does not display for Monitor role users. For more on user roles, see "About UniView Portal user accounts".
- If you have Superuser, Admin, or Manage credentials and do not see this button, the feature has not been enabled in your environment.
- You can connect to only one Google Workspace domain at a time.

	ard Protect Jobs Organizations		© 🚆 🧑	odb <b>ar tiğari</b> te
Protect				+ Add Customer
ក្ល Spanning Licenses ្ស				
Assigned 🚺 100   🛅 0				
Remaining 🚺 0   🖬 0				
Purchased 🚺 0   🖻 0				
Appliances Assets Mic	rosoft 365 Google Workspace Salesf	orce Microsoft Azure Hover to view description	Log in to Spanning Google Workspace	
Domain Name 🗢	Organization   Standard Licer	nses Expiration Users Coverage Storage	Success	Manage
spannir m Data center location	Intuit Click to modify or 100 Click to modify or 100 Click to mapping	8/30/25 87 Stze (compressed) Stze (compressed)	Mall Backup 🕑 👌	Hover to view details

#### To manage organization mappings

To enable BackuplQ alerts, the Google Workspace domain must be mapped to a UniView Portal organization. Use this procedure to manage these mappings.

- 1 In the Google Workspace view, locate the domain whose mapping you want to add, modify, or remove.
  - The Google Workspace domain name displays in the Domain column.
  - The Organization column contains either the name of the organization that has been mapped to this domain or *None* if no organization has been mapped.
- 2 In the Organization column, click 🗹 next to the organization name and do one of the following:
  - To add a mapping and enable BackuplQ alerts for the domain, select an organization from the list.
  - To modify the mapping, simply select a different organization from the list.
  - To remove the mapping and disable BackupIQ alerts for the domain, select X.



JNIVIEV	Dashboard	Protect	Jobs Organi:	zations
Protect				
<b>ງ'</b> Spanning Li	censes 🚯			
Assigned	21000   🖻 100			
Remaining	20 🛛 🔁 110			
Purchased	21020   🖻 210			
Appliances	Assets Microso	oft 365	Google Works	Salesforce
Domain Name 🗢	Organization 🖨		Standard Licens	es Expiration
us 2P 'ska-Bc		Click t organ		9/6/25
	Choose an organiz 🗸		Lauon	
Big nbers	Choose an organiz. V Barton - Raynor	C	■ 17777 2	9/6/25
Big mbers	Barton - Raynor ABashirian Inc			.,
	Barton - Raynor Bashirian Inc s Autotask Autotask Cot × ∨	C	17777 🖒	.,
<ul> <li>Brown and Son</li> <li>Kaseya UniView</li> </ul>	Barton - Raynor Bashirian Inc s Autotask Autotask Cor × ✓ Auer - Mullion	@ @ ]	I 17777 🗭	apping 7/26/22
Brown and Son Kaseya UniView I Mi: ibs Pinkston Farms	Barton - Raynor Bashirian Inc s Autotask Autotask Cor Auer - Multion Autoclose Client Autoclose Client Autotask Corporation	C C C C	I 17777 영 Click to modify m	9/18/24

#### To allocate Google Workspace licenses

In the Google Workspace view, you can easily add licenses to or remove licenses from a domain by editing the number of Standard Licenses. You can also reallocate Spanning licenses by removing licenses from one domain and adding them to another. The changes you make are synced to the licensing tiles in Spanning Backup for Google Workspace.

**Note:** Licenses must be purchased through Spanning Backup. The UniView Portal pooled licensing feature enables you to manage how your licenses are allocated only.

The following steps show how to modify the number of licenses allocated to a Google Workspace domain:

1 The spanning domain has 100 standard licenses allocated.



UNIVIEW	Dashboard	Protect	Jobs Organizations				ŝ	٩	?	🔵 db	re 1K
Protect										+ Add Custo	omer
ា <sup>°</sup> Spanning Lice	enses ()										
Assigned 🚺 10	00   🗖 0										
Remaining 🚺 0	0										
Purchased 🚺 0	0										
Appliances	Assets Microso	oft 365	Google Workspace	Salesforce	Microsoft Azure						
Domain Name 🗢	Organiza	tion ‡	Standard Lic	enses Expiration	Users Coverage Storage		🤄 La	st 30 Ba	ckups		
us spanb.c	om 212 Bro	oklyn 🖒 100 licenses	allocated	8/30/25	87% ▲ 6.5 GB 2.2 GB	00000	Ģ				C

UNIVIEV	$\sim$	Das	shboard	Protect	Jobs	Organization	IS									මා	<u>9</u>	?	db	re	К
Protect																			+ Add C	Customer	
ក្' Spanning I	icenses	<b>i</b>																			
Assigned	0	1 🗖 0																			
Remaining	÷	1 🗖 0																			
Purchased	۴.	🗖 0																			
Appliances	Asset	ts	Microso	ft 365	Google	e Workspace	Salesforce	Mic	rosoft Azı	Ire											
Domain Name 🗢			Organizat	tion ÷		Standard	Licenses Expiration	User	s Coverage	Storage		۵	$\geq$		* (	εL	.ast 30 E	Backups			
us span	o.com		212 Broo	oklyn 🗹		🔳 100	☑1 <sup>30/25</sup>		87%	🕒 6.5 GB	0	<b>⊘</b>	0	0	0	5				ø	
					(	-10 90 3	× 2	Ø		hange successf will be updated				ĸ							

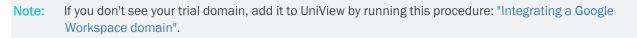
**3** License allocation is modifed:

UNIVIEW	Dashboard Protect	Jobs Organizations		ම	<b>2</b> 🦻	odb re ĸ
Protect						+ Add Customer
<b>ງ</b> ' Spanning Licenses (	)					
Assigned						
Remaining						
Purchased	;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;					
Appliances Assets	Microsoft 365	Google Workspace Salesforce	Microsoft Azure			
Domain Name 🗢	Organization 🗢	Standard Licenses Expiration	u Users Coverage Storage	= 4 = = ± € L	ast 30 Backups	
🚥 span 📩 D.com	212 Brooklyn 🕑	₿ 90 🖉 8/30/25		000000		
	# of allocated licenses	s is modified	🛢 2.2 GB			



#### To upgrade from a Spanning Google Workspace trial to a paid subscription

1 In the Google Workspace view, locate your trial domain.



	ard Protect	Jobs Organizations						ł	<u>ئ</u>	ළ	(?) 🔵 d	ba nitre	
Protect												+ Add Custome	er
ា Spanning Licenses ()													
Assigned 🚺 21000   🔁 100													
Remaining 🚺 20   🔁 110													
Purchased 🚺 21020   🔁 210													
Appliances Assets Micro	osoft 365	Google Workspace Sale	esforce Micro	soft Azure									
Domain Name 🗢 Organization 🗢	Standard Licen	Virtual Licenses These licenses are related to the Trial	Users Coverage	Storage				* C	La	ist 30 Ba	ckups		
Brown and Sons Autotask 🖉	🛯 100 🖧 (	subscription. Trial Licenses are limited to only 100, and cannot be deducted from. Edit this field in order to upgrade	<mark>50</mark> %	<ul><li>85.5 MB</li><li>52.4 MB</li></ul>	0	×	0	⊙ ©	I			2	2
Pinkston Farms 212 pions 9	I 25 🗹	to the Paid subscription.	58%	<b>88.8</b> PB				9 9	- 11				

2 In the Licenses column, click @, change the number of standard licenses, and click  $\checkmark$  to save.

Note: When you click  $\mathcal{O}$ , the number of licenses that were assigned to users during the trial displays. You can accept this value or enter another value. Your paid subscription is created with this number of standard licenses.

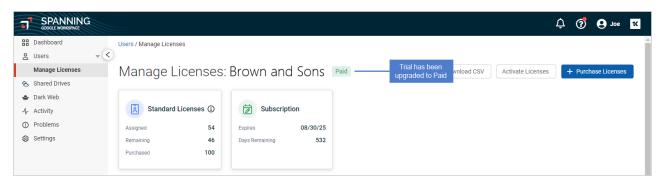
INIVIE	$\sim$	Dashboar	d Prot	tect Jobs C	Irganizations							¢;	9 🧖	odba	nitre
Protect														+ Add Cus	stomer
<b>J</b> 'Spannir	ng Licenses	<b>i</b>													
Assigned	21000	100													
Remaining	20	110													
Purchased	21020	210													
Appliances	Asset	s Micros	soft 365	Google Wo	rkspace	Salesforce	Microsoft Azu	e							
Domain Name 🗢		Organization	÷	Standard Licenses	Expiration	Users C	coverage Storage		$\geq$		: C	Last 3	80 Backups	3	
Brown and	Sons	Autotask Corporation	C	L 100 合 C	12/30/23		% 💩 85.5			0	ڻ <b>ر</b>				ß
Trial															

**3** Your trial is upgraded to a paid subscription.



JNIVIEV	$\mathcal{N}$	Dashboard	Protec	t Jobs	Organizations							Ę	e) 2	9 🧑	🔵 dba	nitre
Protect															+ Add Cus	stomer
<b>T</b> Spanning	Licenses	<b>i</b>														
Assigned	21000	100														
Remaining	20	110														
Purchased	21020	210														
Appliances	Assets	Micros	oft 365	Google Wo	orkspace	Salesforce Mici	osoft Azure									
Domain Name 🗢		Organization	St	andard License	s Expiration	Users Coverage	Storage		🛆 i			C	Last 3	0 Backups	•	
Brown and So	ons	Autotask Corporation	C	E 11 @ #	12/30/23 of licenses	<mark>50</mark> %	<ul><li>85.5 MB</li><li>52.4 MB</li></ul>	0	×		0	Ģ				Z
Pinkston Far	ms	Tenant is upo to paid subso		🗉 25 🕜 🛛 🖡	ourchased	58%	💩 88.8 PB	Ø	0	9 (	<b>&gt;</b> ७	Ģ				ß

On the Manage Licenses page in Spanning Backup for Google Workspace, the domain now displays as a paid domain. The number of standard licenses you entered above displays in the Standard Licenses tile, in the Purchased license count.



## Working with Salesforce

If you are using Spanning Backup for Salesforce, integrate your Salesforce organization to manage domain/organization mappings, check the status of recent backups, receive alerts for failed backups, and view license and storage information — right from UniView.

Start by adding the integration as described in "Integrating a Salesforce organization". Once the organization has been added, information is synced from Spanning Backup each night. Use the Salesforce view to work with this data, as described in "Working with the Salesforce view".

#### Integrating a Salesforce organization

This procedure requires the following:

- A UniView account with superuser or administrator privileges
- A Spanning Administrator or Salesforce System Administrator account



**Note:** If you do not have a Spanning Administrator or Salesforce System Administrator account, use this procedure to start the integration. Use the **Copy Invite Link** option to send the Spanning Administrator or Salesforce System Administrator a link they can use to complete the integration procedure.

#### To add the integration

- 1 Log in to the UniView Portal with a superuser or administrator account.
- 2 On the Protect page, click **Salesforce**.
- 3 Click Add Customer.

UNIVIEW	Dashboard Protect	Jobs Organizations	(8) 😤 🧑 🔵 dt. 🚬 ire 📧
Backup Status			2 + Add Customer
Appliances Ass	sets Microsoft 365	Google Workspace Salesforce	
Domain Name 🗢	Organization $\Rightarrow$	Licenses Expiration Users Coverage Storage	C A P A H Last 30 Backups
		No Domains	
		Looks like you don't have any Domains connected	

- 4 Select an Organization from the list.
- 5 Select the Salesforce or Salesforce Sandbox platform.
- 6 Do one of the following:
  - If you have Spanning Administrator or Salesforce System Administrator credentials, click **Add** and continue with this procedure to complete the integration.
  - If you do not have Spanning Administrator or Salesforce System Administrator credentials, click **Copy Invite** Link. Then email the link to the Spanning Administrator or Salesforce System Administrator so that they can complete the integration.



Add C	ustomer	×
	ustomer or provide an invite link for your customer to complete the ion process.	
i	Organization sync is enabled. If you don't see a pre-existing organi in the list below, please make sure it exists at the source and is syr UniView.	
Organiza 212 Br Select Pl	ronx	
212 Br Select Pl	ronx	
212 Br Select Pl	ronx-1 ~	
212 Br Select Pl Micr Goo	ronx 1 ~ Iatform rosoft 365	
212 Br Select Pl Micr Good Sale	ronx 1 ~ Iatform rosoft 365 Igle Workspace	

7 Enter your Spanning Administrator or Salesforce System Administrator credentials.



salesforce	
Username	
joe.sch@spannib.com	
Password	
Log In	
Remember me	
Forgot Your Password? Use Custom Domain	
Not a customer? Try for Free	
© 2023 Salesforce, Inc. All rights reserved.   Privacy	

8 Click Accept to authorize access to your Salesforce organization.



	ermissions requested
st stu	je "vy.com
	s application is not published by or or or organization.
Thi	s app would like to:
$\sim$	Have full control of all site collections
$\sim$	Use Exchange Web Services with full access to all mailboxes
$\sim$	Sign in and read user profile
$\sim$	Read directory data
$\sim$	Read and write all groups
$\sim$	Read directory data
$\sim$	Read and write directory data
$\sim$	Access directory as the signed in user
$\sim$	Read all groups
$\sim$	Read and write items in all site collections
$\sim$	Read basic mail in all mailboxes
$\sim$	Read names and members of all chat threads
all u	ou accept, this app will get access to the specified resources for sers in your organization. No one else will be prompted to ew these permissions.
you state	epting these permissions means that you allow this app to use r data as specified in their terms of service and privacy ement. The publisher has not provided links to their terms you to review. You can change these permissions at s:// . Show details
Doe	s this app look suspicious? Report it here

9 The domain is added and displays in the Salesforce view. Data is synced nightly from Spanning Backup to the UniView Portal. For details about this data, see "Working with the Salesforce view".



#### Working with the Salesforce view

After you have integrated your Salesforce organization, use the Protect > Salesforce view to manage organization mappings, view license and storage information, and check the status of an organization's recent backups.

The following information displays in the Salesforce view:

• Spanning Licenses tile – Shows the total number of Spanning licenses assigned, remaining, and purchased. License counts include licenses from all Spanning Backup products.

**Note:** Archived licenses apply only to Spanning Backup for Microsoft 365.

- Assigned The number of standard licenses (I) and archived licenses (I) that have been assigned to users.
- Remaining The number of standard licenses (王) and archived licenses (五) that have not yet been assigned to a user.
- Purchased The total number of Spanning Backup standard licenses (<sup>1</sup>) and archived licenses (<sup>1</sup>) that have been purchased.
- Data center icon Location of the organization's Spanning data center. For example, 🔤 for United States.
- Domain Name Salesforce organization.
- Organization UniView organization mapped to the Salesforce organization.
  - None indicates no organization has been mapped. To enable BackupIQ alerts, click 2 and select an
    organization.
  - To update the mapping, simply click 🗹 and select a different organization.
  - To remove the mapping and disable BackuplQ alerts, click 🖄 and select X.
- Licenses Number of licenses that have been allocated to the organization.
- Expiration License expiration date.
- User Coverage The total number of licensed users divided by the total number of users in the organization.
- Storage Amount of storage used. 💩 is the amount of raw data that has been downloaded from the cloud, 🛢 is the actual amount of local storage used after compression.
- KaseyaOne (IT Complete) status. indicates login with KaseyaOne is enabled, indicates login with KaseyaOne is disabled.
- 🔎 Daily Notifications status. 🔮 indicates notifications are enabled, 🗡 indicates notifications are disabled.
- E Chatter Feed status. Spanning can post status notifications for your backups, restores, and exports directly to Chatter. A indicates Chatter posts are enabled, X indicates Chatter posts are disabled.
- A Rule-based Alerts status. Spanning enables you to create your own rule-based alerts. These alerts are sent to the email address and Chatter feed configured for notifications. Indicates rule-based alerts are enabled, X indicates rule-based alerts are disabled.
- $\psi$  External API status.  $\heartsuit$  indicates an external API is enabled, imes indicates external APIs are disabled.



- Last Backups Status of the organization's last backup, by day. Displays status icons for the last 30 days:
  - Indicates that the last backup on this day was successful. Hover to view the date and number of problems.
  - indicates that the last backup on this day was partially completed. Hover to view the date and number of problems.
  - indicates that the last backup on this day failed. Hover to view the date and number of problems.
  - Indicates that there are no backups. Hover to view the date.
- Click to connect to Spanning Backup for Salesforce, where you can view errors. (For details, see the <u>Spanning</u> Backup for Salesforce Admin Guide.)

#### Notes:

- This button does not display for Monitor role users. For more on user roles, see "About UniView Portal user accounts".
- If you have Superuser, Admin, or Manage credentials and do not see this button, the feature has not been enabled in your environment.
- You can connect to only one Salesforce organization at a time.

NIVIEW	Dashboard	Protect Jobs	Organizations								ŝ	<u>2</u>	🔊 🔵 db	e
rotect													+ Ad	d Customer
ា Spanning License	es 🗊													
Assigned 2080	0 🖻 1													
Remaining 900	0													
Purchased 2980	0 🖻 1													
Appliances Salesfo		011111011	Workspace	Salesforce	Microsoft Azure									
organiza	Organization ¢	organization Licenses	Expiration	Users Coverage	Storage ()	~		ver to vi 厚	ew des	scription ⊎	Last 30	Packupe		
	•					T Complete	<u> </u>							
us alvina.info	212 Bronx 🗹	793	9/26/2	239%	1 0 MP	_		×	×	×				ß
Bahringer LLC	212 Bronx 🔽	984	9/26/2	Protected	Storage Size (Uncompressed	) ×	X							C2
Daninger 220			,, 20, 2	107.0	■ 1.9 MB									کا
us Casper Inc	212 Bronx 💋	756	9/26/2	426%	📣 976.6 KB	0	×	$\bigcirc$	×	0				Ľ
					🕄 1.9 MB					Back	up Failed		Hover to view details	
Dach LLC	ABLE Manufacturin	<b>2</b> 60	9/26/2	14 Spanning	Storage Size (Compressed)	×	×	$\bigcirc$	×	569 Prot				Z
Dooley - Schinner	212 Bronx 🕅	Click to modify or		127%	<b>4</b> 976.6 KB					Friday, A	ug 18 2023	$\sim$		- 7
Booley - commen		remove mapping	5/ 20/ Z=	127/0	■ 1.9 MB	<b>•</b>		×		<b>•</b>				ß
			0.40.4.40-	0000	49.6 MB						шш			ß
us elyse.net	01/ to 🗹	69	9/26/2	338%		· · · ·	-	-						تکا
us elyse.net	01/ to 🗹	69 Click to map	9/26/2	338%	<b>480.7 MB</b>					Log ir	i to Span	ning for Sa		Manage



# Working with Datto Backup for Microsoft Azure

If you are running backups with Datto Backup for Microsoft Azure (DBMA), you can integrate DBMA to manage your backups right from the UniView Portal. Start by adding the integration as described in "Integrating Datto Portal". Once the integration has been added, the Microsoft Azure view displays on the Protect page. To access this view, click **Protect > Microsoft Azure**:

UNIVIE	$\mathcal{N}$	Dashboard Protect	Jobs Organizations		ŝ	<b>9</b>	?	od dia antica antice	16
Protect			1						
Appliances	Assets	Microsoft 365	Google Workspace	Microsoft Azure2					

The Microsoft Azure view provides summary and status information about the assets you protect with the Datto DBMA backup product. Assets that meet these criteria display on the page: the asset is a Datto CloudSIRIS model and its Datto client has been mapped to a UniView Portal organization. Datto clients were automatically mapped to organizations when the Datto Portal integration was added to UniView Portal. As clients are added to the Datto Portal, they are added to UniView Portal and automatically mapped to organizations. (If needed, you can modify organization mappings as described in "Mapping Datto Portal clients to organizations".)

**Note:** If you do not see the Microsoft Azure view, add the Datto Portal integration as described in "Integrating Datto Portal".

The Microsoft Azure page is shown below. To modify the display, you can sort and filter the page:

- To change the sort order of the display, click any column heading.
- To view additional pages of assets, use the scroll arrows below.
- To filter the display, do any of the following:
  - Select a Scope
  - Select an Organization
  - Enter text in the Asset Name field to display only asset names containing the string you entered
  - Click Recent Failures to display only assets that have had a recent backup failure

The following information is given for each asset:

- Type icon Hover over the icon to see the asset type description.
- Name Asset name.
- Organization The asset's UniView Portal organization.
- Last Backup Number of minutes, hours, days, weeks, or months since the last backup.



- Recent Backups Icons indicating the status of backups over the last seven days. Hover over an icon to see job details. Click an icon to view asset details.
  - All backups were successful
  - One or more backups failed or ran with warnings
  - All backups failed
  - No backups were taken

NI∨ rotect	ΊΕW	Dashbo	oard Pro	tect Jobs Organizati	ons		@ 📒	🥐 🕒 di <b>nan</b> i ire
Applianc	ces Assets	Mic	rosoft 365	Google Workspace	e Microsoft Azure			
Scope			Organizatio	on	Asset Name	😑 🛛 Backup data ing	jested successfully	
All		$\sim$	All	~		😑 🗧 Backup job proc	luced warnings	C Recent Failures
						X Backup failed	Hover to view ice	on legend Legend ③
Type 🗘	Name ≑			Organization 🗢	Last Backup	÷	Recent Backups	\$ ≑
vm	DFP			0emo	an hour age	D	T W T F S S	
vm	Gern anVM			0 <sup>°</sup> emo	an hour age	0	T W T F S S	
vm	gen1msessio			01 no	an hour age	D	TWTFS	
irtual Machir	CHAU-2016-03			Chau	an hour age	D	T W UTC-07:00 Backups:	5/12/2023 0
	Server2016			Choice Studios		a status icon ob details	T W Successe	s 17
<u></u>	Server2019			Choice Studios		w asset details	T W T F S S Monday, 6 UTC-07:00	5/12/2023
vm	amsart-az-dc-01			Amsterdam Artisar	ns an hour age	D	T W Backups: Successe	
vm	amsart-az-web-0			Amsterdam Artisar	ns an hour age	0	T W Failures	2
vm	core			0 no	an hour age	D	T W T F S S	s M
vm	Iltisessio			( no	an hour age	2	TWTFS	-

Click an asset to view these details:

- Last Backup Number of minutes, hours, days, weeks, or months since the last backup.
- Last Certified Number of minutes, hours, days, weeks, or months since a backup has been certified.
- Recovery Points Lists the asset's recovery points (local backups) by date.
- Local Icon indicating the status of the backup. Click an icon to view log details.
  - for success
  - for job ran with warnings
  - 🛛 🛑 for failure



NIVIEV	Dashboard Protect	Jobs Organizations		🕲 🚔 📀 dt	tre <mark>1</mark>
rotect				Asset Detail	×
Appliances	Assets Microsoft 365	Google Workspace Micros	soft Azure	Server2019	
Scope	Organization	Asset Name		Last Backup	25 minutes ago
All	~ All	~		Last Certified Asset details disp	blay
Type 🌣 Name	8 ≑	Organization 🕆	Last Backup 🗢	Recovery Points	Legend 🕠
o azure	ebac <b>i – –</b>	( mo	23 minutes ago	Recovery Points	Local
vm	msessio	( mo	23 minutes ago	June 12, 2023, 01:03 pm	٠
폐 gen1		0 mo	24 minutes ago	June 12, 2023, 12:03 pm	٠
				June 12, 2023, 11:03 am	٠
<b>v</b> m	essio	0 mo	24 minutes ago	June 12, 2023, 10:03 am	٠
🧓 Serve	er2016	Choice Studios	25 minutes ago	June 12, 2023, 09:03 am	۲
Germ	nanVM	0 mo	25 minutes ago	June 12, 2023, 08:03 am	۲
SRV-I	FTG-AZ-01	Fulton Technology Group	25 minutes ago	June 12, 2023, 07:03 am	۲
		·	-	June 12, 2023, 06:03 am	٠
🧓 Serve	er2019	Choice Studios	25 minutes ago	June 12, 2023, 05:02 am	٠
om amsa	art-az-dc-01	Amsterdam Artisans	25 minutes ago	June 12, 2023, 04:02 am	2
cc-se	erver2016	Cheng Inc	25 minutes ago	10 ∨ per page 1 of 2 pages	< , L

Click a recovery point or status icon to view the job log:



Release 2.50 | April 2024

UNIV	Dashboard	Protect Jobs Organizations		© 🕊 🎯	odbi re K
Protect	Job Log		×	Asset Detail	×
Applian	Local	2 Job log displays		Server2019	
Scope	Job ID	000 103 0134030	11ee0933-ea68-956a-9d68-0654aa7679e4	Last Backup	33 minutes ago
All	Result		Success	Last Certified	-
Туре				Recovery Points	Legend 🚯
<b>\$\$</b>				Recovery Points	Local
<b>m</b>				June 12, 2023, 01:03 pm	•
5				June 12, 2023, 12:03 pm	•
				June 12, 2023, 11:03 am	•
<b>\$100</b>				June 12, 2023, 10:03 am	•
<b>m</b>				June 12, 2023, 09:03 am	Job Details
(m)				June 12, 2023, 08:03 am	0
				June 12, 2023, 07:03 am	•
				June 12, 2023, 06:03 am	•
<b>v</b>				June 12, 2023, 05:02 am	•
<b>(</b>				June 12, 2023, 04:02 am	20
<b>(</b>				10 v per page 1 of	2 pages < >



## Working with Jobs

Use the Jobs page to view information about active, scheduled, and recent jobs. To access the Jobs page, click Jobs:

JNIVIE	ΞVV	Dashboard	Protect J	obs Organizat	ions						ŝ	; 🤨	?	🔵 dba 🔤 uni	itre 14
				Cli	ck here										
Jobs															
Recent	Active	Scheduled													
Scope		Organization	Applia	ance	Asset Name	:	Status	1	Туре		Start		Er	nd	
All	$\sim$	All	~ All	~		Q	All	~	All	$\sim$		ť			<b>#</b>

The page contains these views:

- Recent (default view) Provides summary and status information about recent Unitrends jobs. From this page you can also view job details. For details, see "Working with recent jobs".
- Active Provides information about currently running jobs. For details, see "Viewing active jobs".
- Scheduled Provides summary status information about scheduled jobs. From this page you can also view schedule details. For details, see "Working with scheduled jobs".

## Working with recent jobs

Use the Recent jobs view for the following:

- "Viewing recent jobs"
- "Filtering the Recent jobs view"
- "Viewing job details"

#### Viewing recent jobs

The Recent jobs view displays recent jobs across all Unitrends appliances that have been added to your backup.net instance. (To filter the display, see "Filtering the Recent jobs view".)

#### Graph

A graph shows the number of successful and missed jobs over the last 13 days.

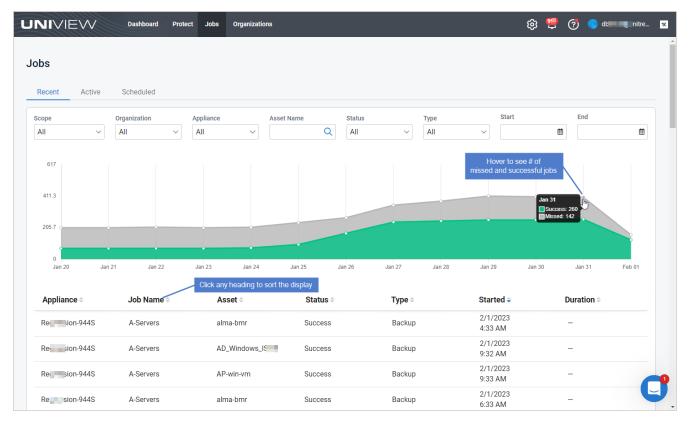
- Hover over a point in the graph to see the number of successful and missed jobs on a given day.
- See the table below the graph for status by job.



#### Status by job

The following information is given for each recent job. To change the sort order of the display, click any column heading.

- Appliance Name of the Unitrends appliance that ran the job.
- Job Name Name of the job.
  - If initiated by a UniView backup policy, the job name is "UniView-AssetName".
  - If initiated by the Unitrends appliance, the job name is the Unitrends job name.
- Asset Name of the Unitrends asset or '-' if the job contains multiple assets.
- Status Job status: Success, Warning, or Error.
- Type Job type: Backup, Backup Copy Hot, Backup Copy Cold, or Certification (DCA job).
- Started Date and time at which the job started or was added to the appliance job queue.
- Duration Amount of time that the job ran, in *hh:mm:*ss format (hours, minutes, seconds).



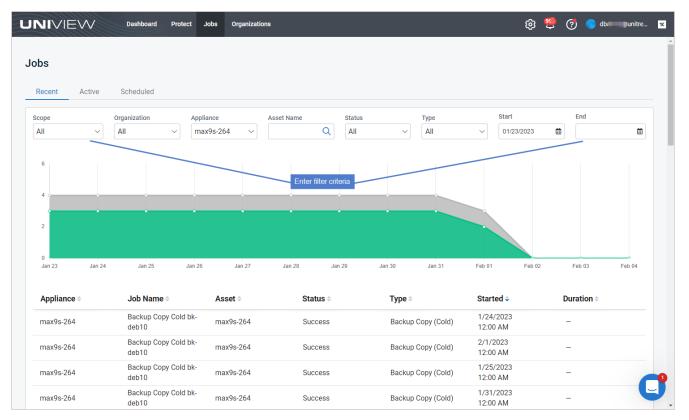
## Filtering the Recent jobs view

The Recent jobs view displays jobs that ran in the last 90 days across all appliances that have been added to your backup.net instance.



To filter the display, enter filter criteria in any of the following:

- Scope Select a scope from the list. (Select All to clear the scope filter.)
- Organization Select an organization from the list. (Select All to clear the organization filter.)
- Appliance Enter a text string, then press **Enter** to apply. Appliance names containing the text you entered display.
- Asset Name Enter a text string, then press Enter to apply. Asset names containing the text you entered display.
- Status Select a job status from the list. (Select All to clear the job status filter.)
- Type Select a job type from the list. (Select All to clear the job type filter.)
- Start and End Click the calendar icons to filter by date range. The date range must be within the last 90 days.



## Viewing job details

To view job details:

- 1 In the Recent jobs view, locate the job in the list below the graph. (If needed, sort or filter the display. See "Filtering the Recent jobs view" above.)
- 2 Click on the job. These details display in the Job Log:
  - Name Job name.



- ID Job ID assigned by the Unitrends appliance.
- Mode Job mode.
  - For backups and hot backup copies: Full, Incremental, Differential, Selective, or Bare Metal (Windows only).
  - For cold backup copies: Backup Copy.
  - For certification (DCA) jobs: Test.
- Result Job result: Success, Warning, or Error.
- Size Size of the backup or backup copy.
- Output Job log raw output. Review to determine why a job did not complete successfully.
- **3** To exit the Job Log, click the **X** icon.

UNIVIEW	Dashboard Protect Jo	bs Organizations		ණ 📒	di 💼 di 🗾 di 🔤 di 🔤 di 🔤 di
laha			Job Log	2	<b>3</b> ——×
Jobs			Name	Review output to	Click to close the log
Recent Active	Scheduled		ID	troubleshoot errors	1.1675238400.i.1
Scope	Organization Applian	nce Asset Name	Mode		Backup Copy
All ~	All ~ max9	9s-264 ~	Result		Error
6			Size (MB)		
			Output		
4 ~			Failed: Failed to get media size		
2					
0 Jan 23 Jan 24	Jan 25 Jan 26	Jan 27 Jan 28			
Appliance 🗢	Job Name 🗢	Asset 🗢 S			
max9s-264	Backup Copy Job	max9s-264 E			
max9s-264	Backup Copy Job	max9s-264 E			
max9s-264	Backup Copy Job	1 e Click the job			
max9s-264	Backup Copy Job	max9s-264 E	2		J

## Viewing active jobs

The Active jobs view displays all jobs that are currently running across all Unitrends appliances that have been added to your backup.net instance. To change the sort order of the display, click any column heading. (To filter the display, see "Filtering the Active jobs view".)

The following information is given for each active job:



- Appliance Name of the appliance where the job is running.
- Job Name Name of the job.
  - If initiated by a UniView backup policy, the job name is "UniView-AssetName".
  - If initiated by the Unitrends appliance, the job name is the Unitrends job name.
- Asset Name of the asset.
- Status Job status.
- Type Job type: Backup, Backup Copy Hot, Backup Copy Cold, or Certification (DCA job).
- Started Date and time at which the job started.
- Progress Job progress bar.
- Duration Amount of time that has elapsed since the job started, in *hh:mm*:ss format (hours, minutes, seconds).
- icon Click to cancel the job.

Recent Active	Scheduled							
соре	Organization	Appliance		Туре	Job Name	Ass	et Name	
All	~ All	~ All	$\sim$	All ~		Q Click any hea	ding to	Q
Appliance 🗢	Job Name ≑	Asset ≑	Status ≑	Type ≑	Started ≑	sort by colu Progress≑	Imn Duration 🗢	
	oob Nume +	Windows2012R2_	outus +	Backup Copy	2/1/23	r togress +	bulution	
Regession-944S	Backup Copy	SB	Active	(Hot)	2:54 pm		00:00:09	÷
Recision-944S	Backup Copy	Win8.1Test	Active	Backup Copy	2/1/23	Click to can	cel the runnig job	
				(Hot)	2:53 pm		0,	
LHR2-6( 10-	Backup Copy	System Metadata	Active	Backup Copy (Hot)	2/1/23 2:54 pm		-	Cancel
recovery-90	Backup Copy Job			Backup Copy	2/1/23			
0	win-109 file	win109	Active	(Hot)	2:53 pm		-	÷
recovery-9( 4-	Backup Copy	System Metadata	Active	Backup Copy	2/1/23		_	:
				(Hot)	2:51 pm			
Re sion-944S	Backup Copy	System Metadata	Active	Backup Copy (Hot)	2/1/23 2:48 pm			:

Click a row to view these job details:

- Name Name of the job.
- Job ID
- Client Name Name of the asset.



- Appliance Name of the Unitrends appliance.
- Message Job status message.

NIVIEW	Dashboard	Protect Jobs Organ	izations			段 📒 🤅	🤊 🔵 dba 💶 iitre
. h						Job Detail	
obs						Name Job detai	2 Backup C
Recent Active	Scheduled					Job ID	16923
Scope	Organization	Appliance	Туре		Job Name	Client Name	192.168.197
All	~ All	~ All	~ All	$\checkmark$		Appliance	Regression-9
Appliance 🗢	Job Name 🗢	Asset ≑	Status ≑	Туре 🗘	Started 🗢	Message	
Re ion-944S	Backup Jo HYP	PC_win11-inc-live	Cancelled	Backup	2/1/23 3:01 pm	Processing (3/4)	
Ression-944S	Land and ALL ASSETS 5	А	Cancelled	Backup	2/1/23 3:06 pm		
Reion-944S	Backup Copy	Win8.1Test	Active	Backup Copy (Hot)	2/1/23 3:08 pm		
Re ion-944S	Backup Copy	Windows2012R2_ SB	Active	Backup Copy (Hot)	2/1/23 3:08 pm		

## Filtering the Active jobs view

The Active jobs view displays all jobs that are currently running or completed in the last few minutes, across all Unitrends appliances that have been added to your backup.net instance.

To filter the display, enter filter criteria in any of the following:

- Scope Select a scope from the list. (Select All to clear the scope filter.)
- Organization Select an organization from the list. (Select All to clear the organization filter.)
- Appliance Select an appliance from the list. (Select All to clear the appliance filter.)
- Type Select a job type from the list. (Select All to clear the job type filter.)
- Job Name Enter a text string, then press Enter to apply. Job names containing the text you entered display.
- Asset Name Enter a text string, then press Enter to apply. Asset names containing the text you entered display.



bs								
Recent Active	Scheduled				En	ter search text		
Cope	Organization	Appliance	⊤ype ✓ All	$\sim$	Job Name backup copy	As: Q w	set Name in	۹
Appliance \$	Job Name 🗦	Asset ≑	Ento Status ≑	er filter criteria Type \$	Started \$	Progress 🗢	Duration 🗢	
Reasion-944S	Backup Copy	Win8.1 st	Active	Backup Copy (Hot)	2/1/23 3:13 pm		00:00:21	÷
Re <b>s</b> ion-944S	Backup Copy	Windows2012R2_ SB	Active	Backup Copy (Hot)	2/1/23 3:13 pm		00:00:19	÷
recovery-9(	Backup Copy Job win-109 file	win109	Active	Backup Copy (Hot)	2/1/23 3:13 pm		_	÷

## Working with scheduled jobs

Use the Schedules view for the following:

- "Viewing scheduled jobs"
- "Filtering the Scheduled jobs view"
- "Viewing schedule details"
- "Running a scheduled job on-demand"
- "Disabling or enabling a job schedule"
- "Deleting a job schedule"

#### Viewing scheduled jobs

The Scheduled job view displays job schedules across all Unitrends appliances that have been added to your backup.net instance. To change the sort order of the display, click any column heading. (To filter the display, see "Filtering the Scheduled jobs view".)

The following information is given for each schedule:

- Appliance Name of the appliance.
- Organization Organization name.
- Job Name Name of the job.
  - If initiated by a UniView backup policy, the job name is "UniView-AssetName".
  - If initiated by the Unitrends appliance, the job name is the Unitrends job name.



- Status Schedule status: Idle (no jobs are currently running) or Running (one or more jobs are currently running).
- Type Schedule type: Backup, Backup Copy Hot, Backup Copy Cold, or Certification (DCA job).
- Last Run Most recent date and time at which this schedule ran.
- Next Run Next date and time at which this schedule will run.

**Note:** Hot copies run automatically as eligible local backups complete. Next Run time does not apply.

• icon – Click to access additional schedule tasks (Run Now, Disable, and Delete).

ecent Active							
	Scheduled						
ope Appli			lob Name	Last Start	Last End	Next Start	Next End
II ~ All	~ All	✓ All ✓	Click any heading	Q  it o sort by column	₿	曲	<b>H</b>
Appliance 🗢	Organization 🗢	Job Name 🗢	Status ÷	Type ‡	Last Run ≑	Next Run 🗢	
Re ion-944S	King Bee	A-Servers	Running	Backup	2/1/2023 1:30 PM	2/1/2023 3:30 PM	÷
recovery-8032s	Helter Skelter	Backup COLD Copy Job	Idle	Backup Copy (Cold)	2/1/2023 12:00 AM	<mark>2/2</mark> Click to 12: view task	
ecovery-8032s	Helter Skelter	Backup Cold Copy Job Image	Idle	Backup Copy (Cold)	2/1/2023 12:00 AM	2/2/2023 12:00 AM	Run Now
max9s-264	RS TEAM	Backup Copy Cold bk-deb10	Idle	Backup Copy (Cold)	2/1/2023 12:00 AM	2/2/2023 12:00 AM	Disable Delete
recovery-90	Recovery Series Team	Backup Copy hotttesxi-deblatest	Idle	Backup Copy (Hot)	_	_	Delete
HV-200-226	Muddy Waters	Backup Copy Job	Running	Backup Copy (Hot)	-	_	÷
nax9s-264	RS TEAM	Backup Copy Job	Idle	Backup Copy (Cold)	2/1/2023 12:00 AM	2/2/2023 12:00 AM	÷
ecovery-8120s- 5(	Recovery Series Team	Backup Copy Job img	Idle	Backup Copy (Hot)	-	-	:
max9s-264	<b>RS TEAM</b>	Backup Copy Job nfs	Idle	Backup Copy (Cold)	2/1/2023	2/2/2023	

### Filtering the Scheduled jobs view

The Scheduled jobs view displays job schedules across all appliances that have been added to your backup.net instance.

To filter the display, enter filter criteria in any of the following:

- Scope Select a scope from the list. (Select All to clear the scope filter.)
- Appliance Select an appliance from the list. (Select All to clear the appliance filter.)
- Type Select a job type from the list. (Select All to clear the job type filter.)
- Status Select Idle, Running, Failover, or InstantLab to filter by job status. (Select All to clear the status filter.)



- Job Name Enter a text string, then press Enter to apply. Job names containing the text you entered display.
- Last Start Date and time at which the most recent job started.
- Last End Date and time at which the most recent job ended.
- Next Start Date and time at which the next job is scheduled to start.
- Next End Date and time at which the next job will end.

bs							
Recent Active	Scheduled						
cope Applianc		Type Status	Job Name	Last Start	Last End	Next Start	Next End
				Q	<b> </b>		<u> </u>
			Enter filt	er criteria			
Appliance \$	Organization 🗢	Job Name ≑	Status ≑	Type 🌣	Last Run 🗢	Next Run ≑	
	Recovery Series	Backup incremental	Idle	Deeluur	2/2/2023	2/3/2023	
recovery-90	Team	109	lule	Backup	12:00 AM	12:00 AM	:
	Recovery Series	Backup Incremental	Idle	Deeluur	2/2/2023	2/3/2023	
recovery-9( 00		debian	luie	Backup	12:00 AM	12:00 AM	

### Viewing schedule details

To view schedule details:

- 1 In the Scheduled jobs view, click a row in the list.
- 2 The following schedule details display:
  - Name Job name.
    - If initiated by a UniView backup policy, the job name is "UniView-AssetName".
    - If initiated by the Unitrends appliance, the job name is the Unitrends job name.
  - Appliance Appliance name.
  - Schedule Days Days when the schedule runs.
  - Schedule Frequency Time(s) at which the schedule runs each day.



bs						Job Detail	
005						Name	Backup incremen
Recent Active	Scheduled				_	Appliance	recovery-9
		iype Status Backup V All	Job Name	Last Start	■ [	Schedule	
Appliance \$	Organization 🗢	Job Name ≑	Status ≑	Type ‡	Last	Days	Frequence at 3:00 a
recovery-90	Recovery Series Team	Backup incremental	Idle	Backup	2/2, 12:0		
	Recovery Series	Backup Incremental	Click a row to view job	details Backup	2/2, 12:(		

## Running a scheduled job on-demand

To run a scheduled job now, click the schedule's i icon, and select Run Now:

bs							
Recent Active	Scheduled						
соре Арр	iance Type	Status	Job Name	Last Start	Last End	Next Start	Next End
	~ All	~ All ~		Q		<b></b>	<b>#</b>
Appliance ≑	Organization 🗢	Job Name ≑	Status ≑	Туре ≎	Last Run 🗢	Next Run 🗢	
	Organization King Bee	Job Name ≑ A-Servers	Status ≑ Idle	<b>Type</b> ≑ Backup	Last Run ≎ 2/2/2023 8:30 AM	Next Run ≎ —	1
Appliance Resion-944S					2/2/2023	-	1 : 2 Run Now

## Disabling or enabling a job schedule

To disable or enable a scheduled job, click the schedule's icon, and select **Disable** or **Enable**:



NIVIEW	Dashboard Protec	ct Jobs Organizations				\$\$ 📮 (?)	dbi <b>nang L</b> itre
bs							
Recent Active	Scheduled						
cope Apr	liance Type	Status	Job Name	Last Start	Last End	Next Start	Next End
All ~ Al	I v All	~ All ~		Q (		<b></b>	<b></b>
Appliance 🗢	Organization ≑	Job Name ≑	Status \$	Туре 🗢	Last Run ≑	Next Run 🗢	
Re sion-944S	King Bee	A-Servers	ldle	Backup	2/2/2023 8:30 AM	_	1
Resion-944S	King Bee	WinServers	ldle	Backup	2/2/2023 8:30 AM	-	Run Now
Resion-944S	King Bee	SharePointServers	Idle	Backup	2/2/2023 8:30 AM	_ (	2 Disable
LHR2-6	Mississippi Sax	Data Copy Access	Idle	Certification	2/2/2023	_	Delete

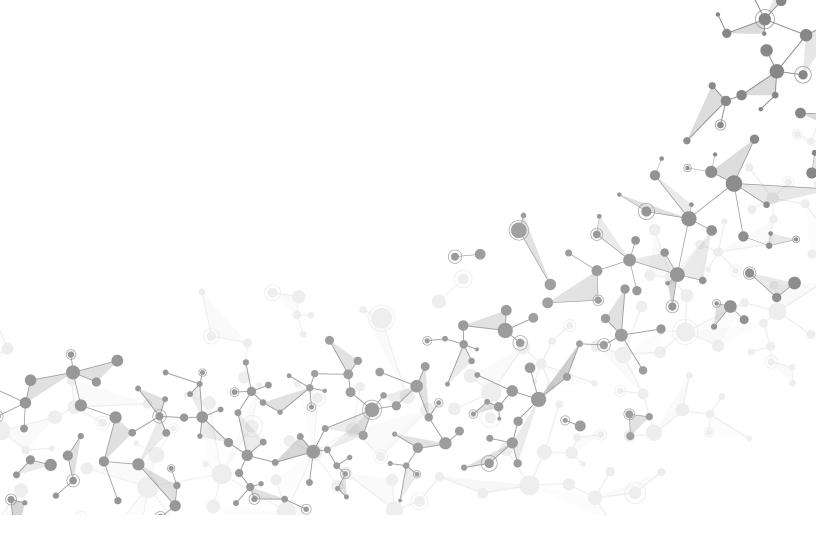
## Deleting a job schedule

To delete a scheduled job, click the schedule's icon, and select **Delete**. Click **Delete** to confirm:

bs							
Recent Active	Scheduled						
cope Appl	iance Type	Status	Job Name	Last Start	Last End	Next Start	Next End
All ~ All	~ All	~ All	~	Q		۵	۵
Appliance \$	Organization \$	Job Name ≑	Status ≑	Type $\Rightarrow$	Last Run 🗢	Next Run 🗘	
Re sion-944S	King Bee	A-Servers			2/2/2023		<b>1</b> —:
Resion-944S	King Bee	WinServers	Please Confirm			×	Run Now
Ression-944S	King Bee	SharePointS	Are you sure you want to delete	the job A-Servers?	3		Disable
							2 Delete



This page is intentionally left blank.





# Working with Organizations

Use the Organizations page to view appliance and asset information by organization and to add or modify organizations. To access the Organizations page, click **Organizations**:

UNIVIEW	Dashboard Protect Job	s Organizations	段 📒 👩 🕒 db 💶 itre 📧
Organizations		Click here	定 Map Organizations + New
Scope All	Name		Q Alerts

See these topics for details:

- "Viewing appliances and assets by organization"
- "Filtering the Organizations page"
- "Adding an organization"
- "Importing organizations from Autotask, ConnectWise Manage, BMS, or Vorex"
- "Editing an organization"
- "Mapping companies and accounts to organizations"
- "Mapping Datto Portal clients to organizations"
- "Deleting an organization"

#### Viewing appliances and assets by organization

The Organizations page displays all Unitrends organizations that have been added to your backup.net instance. To change the sort order of the display, click any column heading. (To filter the display, see "Filtering the Organizations page".)

The following information is given for each organization:

- Name Organization name.
- Scope Scope to which the organization is assigned.
- Appliances Number of Unitrends appliances in the organization's environment.
- Alerts Number of unresolved alerts across the organization's appliances.
- Free Space The total amount of free space across the organization's appliances, shown as a percent of total appliance space.
- icon Click to delete the organization or modify BMS, Vorex, Autotask, or ConnectWise settings. (For details, see
- "Working with Integrations".)



Release 2.50 | April 2024

NIVIEW	Dashboard	Protect	Jobs	Organizations				\$ \$	, ()		itre
ganizations								≓ M	ap Organiz	ations	+ Import
cope		Name									
All	~					СІ	ick any heading to so	ort by column		Q (	Alerts
Name 🕈		:	Scope ≑		Appliances 🗧	Alerts ‡	Free Space 🗘				
Recovery Series Team		I	Jnitrend	s RS	2	1	98.41%	Click t	o delete c	or	:
RS TEAM		I	Unitrend	s RS	1	0	78.35%		PSA setti		
King Bee		I	My Scop	e	1	1	65.77%			Connect	tWise Settings
Helter Skelter		I	Beat		1	2	7.82%			BMS Se	ttings
			My Scop	e	1	1	15.31%				
Mississippi Sax			, ocop								k Settings

Click an organization in the list to view the organization's appliances and assets:

	t Jobs Organizations	🔞 🗘 🧑 🔵 di 🖉 uitre	к
Organizations		2 Map Organizations + Import	
Scope Name			
All		Q Alerts	
Name 🗢	Scope 🗢	Appliances ⇔ Alerts ⇔ Free Space ⇔	
Stokes - Gerhold	Unassigned	0 0 100% :	
Stroman - Koepp Click to view	Unassigned	0 0 100% :	
organization details	si est	7 4 18.14%	



	Protect Jobs	Organizations				ම 🗳	🥐 🔵 dl 🔤 tre
C Te:		This	s organization has	7 appliances			🗊 Delete 🥒 Edit
Appliance Status		Alerts		6	27 18 9	ed Jobs	
						Feb 26 Mar 01 uccess Missed	Mar 03 Mar 05 Mar 07
PM-VMWARE-UB-     DA4     4F4E-8A0D-     315I	IP ADDRESS	LAST SEEN JUST NOW	MODEL VIRTUAL APPLIANCE	ORGANIZATION	VERSION 10.8.1	FREE SPACE 197.9 GB / 696.9 GB 28.39% FREE	Manage 🔀
> Protected Assets View assets			view more a Protected A	listed here. Scroll to ppliances. Click ssets to view an ce's assets			View Unprotected Assets
PM-VMWARE-UB-1	IP ADDRESS 192 48	LAST SEEN JUST NOW	MODEL VIRTUAL APPLIANCE	ORGANIZATION	VERSION 10.8.1	FREE SPACE 100.9 GB / 199.9 GB 50.5% FREE	Manage 🖸

## Filtering the Organizations page

The Organizations page displays all organizations that have been added to your backup.net instance.

To filter the display, enter filter criteria in any of the following:

- Scope Select a scope from the list.
- Name field Enter a text string, then press **Enter** to apply. Organization names containing the text you entered display.
- Alerts Click to slide the switch. Appliances with unresolved alerts display.

NIVIEW Dasht	board Protect Jobs Organizations		(8) 🚝 🦪 🔵 dba==== =itre
rganizations			
Scope	Name Enter search text		Q Alerts
	Select a scope		Click to slide switch
Name 🗢	Scope ≑	Appliances $\Rightarrow$ Alerts $\Rightarrow$ Free Space $\Rightarrow$	
Initech Inc. Test	My Scope	0 0 100%	÷
Ritchie Inc	Unassigned	0 0 100%	÷
Casper Inc	Unassigned	0 0 100%	÷



### Adding an organization

Note: If you have integrated your PSA, do not use this procedure. Instead, add new accounts or companies to your PSA. Once accounts or companies have been added, import them into the UniView Portal as described in "Importing organizations from Autotask, ConnectWise Manage, BMS, or Vorex".

To add an organization:

1 On the Organizations page, click + New.

UNIVIEW	Dashboard	Protect	Jobs	Organizations	😥 📮 🕜 🔴 dba 📲 Mitre 🔣
Organizations					रूटे Map Organizations + New
Scope	~	Name			Click here

- 2 Enter the organization name.
- 3 Select a scope, and click Save:
  - **Note:** A user's scope determines which organizations are visible in the UniView Portal. To ensure that users can only access information about organizations specified in their scope(s), you must assign each organization to a scope.

Add Organization		X Select a scope
Name * Midco Annuities 1	Scope * Columbia-Unitre	2
Enter organization name or se an organization from the Name		Cancel Save

4 The organization is added and displays on the Organizations page.

UNIVIEW	Dashboard Protect Jobs Organizations	\$\$ 💆 Ø	odb 🔤 initre 🔀
Organizations		루 Map Org	anizations + New
Scope All	Name		Q Alerts
Name ≑	Organization is added	Appliances $\Leftrightarrow$ Alerts $\Leftrightarrow$ Free Space $\Leftrightarrow$	
Midco Annuities	Columbia-Unitrends	0 0 100%	÷
50 v per page 1	of 1 pages < >		



## Importing organizations from Autotask, ConnectWise Manage, BMS, or Vorex

If you have integrated your PSA, add new accounts or companies to the PSA. Once accounts or companies have been added, use this procedure to import them into the UniView Portal.

#### To import organizations

**1** On the Organizations page, click **Import**.

UNIVIEW	Dashboard Protect J	obs Organizations	🔞 🚆 🧿 🔵 dba 🖏 nitre 🖬	
Organizations				^
Scope	Name			
All	~		Allerts	

Organizations are imported:

Imp	port Organizations	×
Sea	arch Q 100 v per page 1 of 2 pages	< >
	Help-U-Sell Realty	•
	Hewitt Associates, Inc.	
	Holy Trinity	
	Hospice Care of South Carolina	
	Hunter Engineering	
	Initech 2	
	Initech Inc. Test	
	Intuit	
	K&E Excavating	
	Kaseya	
	Cancel Next	

2 Assign organizations to a scope:



#### Notes:

- A user's scope determines which organizations are visible in the UniView Portal. To ensure that users can only access information about organizations specified in their scope(s), you must assign each organization to a scope.
- In this procedure, the organizations you select are assigned to one scope. Repeat these steps to assign organizations to another scope.
- Check boxes to select organizations. Click Next Step.

Impor	t Organizations	×
Search	Q 100 v per page 1 of 2 pages	< >
□ He	lp-U-Sell Realty	1
🗌 He	witt Associates, Inc.	
□ Ho	ly Trinity	
□ Ho	spice Care of South Carolina	
🗌 Hu	nter Engineering	
Ini	tech 2	
<ul> <li>Ini</li> </ul>	tech Inc. Test 1 Check boxes to select organizations	
Int	uit	
✓ K8	E Excavating	
🗌 Ka	seya	
	Cancel Next S	tep

• Select a scope from the list. Click **Save**.

← Import Organizations	×
Scope * My Scope 1	~
	Cancel Save

3 Map organizations to companies or accounts. Click Map.



	Search	(optional) Enter text to search for an organization	250 ∨ per page 1	of 1 pages 🧹
Map organizations to companies or accounts	Organization	ConnectWise Company	Autotask Account	BMS Account
	Initech 2	Initech 2 V	Autotask Acco 🗸	BMS Account 🗸
	Initech Inc. Tool	Initech Inc. Test 🗸	Autotask Acco 🗸	BMS Account 🗸 🗸
	Intuit	Intuit 🗸	Autotask Acco 🗸	BMS Account 🗸
	K&E Excavating	K&E Excavating 🗸	Autotask Acco 🗸	BMS Account 🗸

### Editing an organization

Note: If ConnectWise Manage, Autotask, BMS, Vorex, or IT Glue has been integrated, you can run additional procedures on the Organizations page. For details, see "To view or modify one organization's ConnectWise Manage settings", "To view or modify one organization's Autotask settings", "To view or modify one organization's BMS or Vorex integration settings", "To view or modify IT Glue credentials settings", and "Working with Integrations".

#### To edit an organization

**1** On the Organizations page, click the organization row in the list.



Release 2.50 | April 2024

NIVIEW	Dashboard	Protect	Jobs Organizations		ලි 🜻 🧑 🛑 dba	itre
ganizations					≓ Map Organization	is + Ne
cope	~	Name			Q	Alerts
Name ≑		S	cope 🌣	Appliances ≑ Alerts 🗢 Free Space 🗢		

2 Click Edit.

	Protect Jobs	Organizations	ôð 🜻 🧑 🔵 dbi===_ ==re 🗙
< Wild Eagle, Inc.			Delete Click to edit

3 Modify the organization name and/or scope, and click **Save**:

#### Notes:

- A user's scope determines which organizations are visible in the UniView Portal. To ensure that users can only access information about organizations specified in their scope(s), you must assign each organization to a scope.
- You cannot modify the name of a VSA, Autotask, ConnectWise Manage, BMS, Vorex, or IT Glue organization.

Edit Organization		(Optional) Assign a different scope
Name *	Scope *	2
Wild Eagle, Inc.	Columbia-Unitrend	s S
(Optional) custome		3
		Cancel Save

#### Mapping companies and accounts to organizations

By default, the integration's company or account is applied to all of its organizations. Use this procedure to quickly apply different companies or accounts to multiple organizations.

#### To map companies and accounts to organizations

- **1** Log in to the UniView Portal.
- 2 Select Organizations.

#### 3 Click Map Organizations.

- 4 (Optional) Filter the organization list by entering a text string in the Search field.
- 5 Select a different company or account for one or more organizations.
  - **Note:** In the figure below, ConnectWise, Autotask, BMS, and Endpoint Backup integrations have been configured for this UniView Portal instance. If you do not see an integration, it has not been added to your UniView Portal instance.
- 6 Click Map.

anizations	•				≓ Map Organ	izations + Import
ope All ~	Organization Mapping Choose related entity on the right dropdov	vn to create mapping			2 ×	Q Alerte
Name 🗢	Search	Q	250	✓ per page 1	of 2 pages <	
212 Bronx	Organization	ConnectWise Company	Autotask Account	BMS Account (1)	Endpoint Backup Organization	÷
212 Bronx Child						÷
78910 Corporation	212 Bronx	Your Comp V	212 Bronx X V	212 Bronx 🗸	Endpoint B 🗸	:
78	212 Bronx 11	ConnectWi 🗸	Group	BMS Accou 🗸	Endpoint B 🗸	÷
78910 Corporation1			TopDog Upstate			÷
A)rg	78910 Corporation!	ConnectWi 🗸	Document Providers	BMS Accou 🗸	Endpoint B 🗸	:
ABLE Manufacturing HQ	ganizations to accounts	ConnectWi 🗸	ABLE Manufacturing West Coast	BMS Accou 🗸	Endpoint B 🗸	:
ABLE Manufacturing West Coast	Abernathy, Oberbrunner and Renner	ConnectWi 🗸	Unitrends MSP Northeast	BMS Accou 🗸	Endpoint B 🗸	i
F 1	ABLE Manufacturing HQ*	ConnectWi 🗸	212 Bronx	BMS Accou 🗸	Endpoint B 🗸	:
A		ConnectWi	ABLE Manu		Fr 👍 nt R 🗸	:

### Mapping Datto Portal clients to organizations

When the Datto Portal integration was added, UniView Portal automatically created a mapping for each Datto client. As new clients are added to Datto Portal, they are automatically added to UniView and mapped to a UniView organization. If needed, you can use this procedure to quickly modify mappings for multiple organizations.

#### To map Datto clients to organizations

- **1** Log in to the UniView Portal.
- 2 Select Organizations.
- 3 Click Map Organizations.



Release 2.50 | April 2024

UNIVIEW	Dashboard Protect Jobs Organizations — 1	😥 🚆 🧭 baarna an intre 📧
Organizations		2 → Z Map Organizations + New
Scope All	Name	Q Alerts

- 4 (Optional) Filter the organization list by entering a text string in the Search field.
- 5 In the Datto Portal Client column, select a different client for one or more organizations.

Note: If you do not see a Datto Portal Client column, the Datto integration has not been added to your UniView Portal instance. To add this integration, see "Integrating Datto Portal".

6 Click Map.

Organization Mapping Choose related entity on the right dropdown to create mapping		>
Search (Optional) Enter text to search for an organization	50 v per page 1 of 10 pages	<
Organization	Datto Portal Client	
212 Bronx	patto Portal Client	$\sim$
12 Bronx Child	DCMA Telt Customer Denis Tell Customer	
Map organizations to clients	Denis T Customer 2 Denis T Customer 3	
Skyend Architecture	Denis Tuu. Customer	~
55tech	Datto Portal Client	~
8910 Corporation	Datto Portal Client	$\sim$
	3	
	Cancel	Мар

### **Deleting an organization**

Deleting an organization removes the organization and all of the appliances associated with that organization. Upon deleting an organization, you can no longer access those appliances in the UniView Portal.

To delete an organization

1 On the Organizations page, click the organization's icon and select **Delete**.

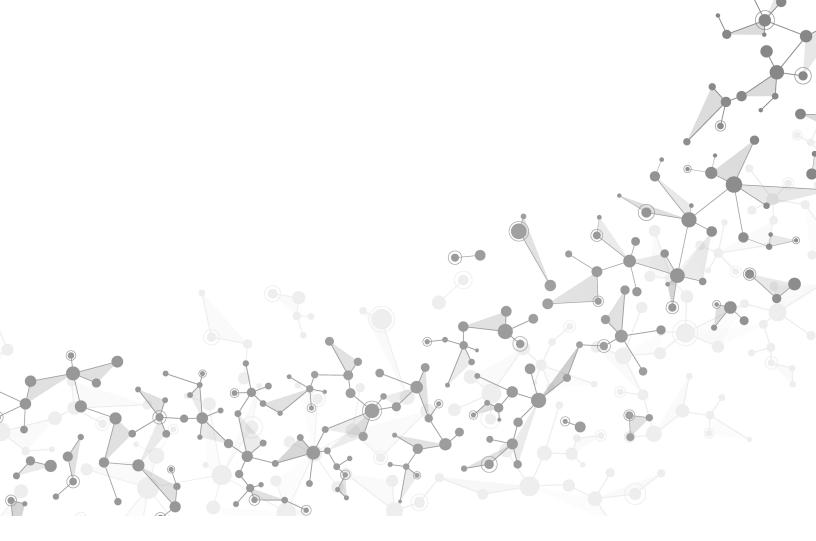


2 To confirm, type DELETE and click **Delete**.

janizations			
ope	Name		
.11	~ corp		Q Aler
Name 🗢	Delete An Organization	Free Space 🗘	
78910 Corporation	You are about to delete organization 78910 Corporation. Deleting an organization will remove all of the	100%	:
Autotask Corporation	appliances associated with that organization and you will no longer be able to access those appliances	100%	Delete
Corporation Strawberry	in the portal. To confirm please type DELETE.	100%	:
Dynamo Corporation	DELETE 2 Type DELETE	100%	:
Corporation Beatty	Type DELETE	100%	1
McGyver Corporation	3	100%	:
Old Guard Corp.	Cancel Delete	100%	:



This page is intentionally left blank.





Working with Organizations

# Working with Users and Scopes

Use the procedures in this chapter to view and add portal users, and to add and apply scopes that define which organizations a user can access in the UniView Portal.

Users and scopes are managed from the Settings page. To access the Settings page, click 🔯:

			e 1K
Scope	Orga	anization	A
Dashboard	~ All	~	53

## Working with users

Use these procedures to manage portal users:

- "About UniView Portal user accounts"
- "Viewing users"
- "Adding a user"
- "Editing a user"
- "Enabling a user"
- "Disabling a user"
- "Resetting 2FA"
- "Resending an activation email"

#### About UniView Portal user accounts

Access to data and features is determined by the *role* and *scope(s)* of the UniView Portal account that the MSP, SMB, or organization uses to log in to the portal. A user's role defines the functions they can perform. The assigned scopes determine the data they can see. Membership in a role and membership in a scope are independent of each other.

- The scope defines which organizations are visible to the user in the UniView Portal. For details, see "Working with scopes".
- The role defines which features and procedures the user can run:

Role	Description
Superuser	This role can perform all operations for all organizations, including creating and modifying other Superuser accounts, and adding or modifying integrations. Superusers are assigned all scopes and have access to all organizations.



Role	Description
Admin	This role can perform most operations, including appliance configuration, backup job configuration and management, and user creation. Admin users cannot create or modify Superuser accounts, cannot create scopes, and cannot add or modify integrations. Admins can only view and perform operations for certain organizations, based on the scopes assigned to their user account.
Manage	This role has Monitor access and can start backup jobs and modify retention settings.
Monitor	This role has read-only access to the user interface and reports.

#### Viewing users

The Users view displays all portal users in the scope(s) that are visible in the current UniView Portal session. To change the sort order of the display, click any column heading.

The following information is given for each user:

- Email Email address used to create the user.
- Role Role that determines which features and procedures the user can run: Monitor, Manage, Admin, or Superuser. (See "About UniView Portal user accounts" for details.)
- Status User status: active, pending activation, or disabled.
- Last seen Number of days since last login.
- icon -
  - For active users, click to edit or disable the user account, or to reset the user's two-factor authentication (2FA).
  - For disabled users, click to enable the user account.
  - For users in *pending activation* status, click to resend the *Welcome to UniView* email with an updated
     Activate Now link. (New users must click Activate Now to set their password and log in to UniView within 48 hours of receiving the Welcome to UniView email. Resending the email provides a new link with a fresh 48-hour activation window.)



NIVIEW Dashboard P	rotect Jobs Organizations		@ 🛢 Ø	odbaannii 🖿 nitre
rettings				+ New
Alerts Integrations Users	Scopes API Access			
Active Users		Click any heading to	sort by column	
Email 🗢	Role 🗘	Status ≑	Last Seen ÷	
(a) dba rends.com	Superuser	Active	just now	÷
User currently logged in to UniView	Superuser	Active	just now	÷
wbo	Superuser	Active	an hour ago	÷
id seya.com		Active	an hour ago	:
	Superuser	Active	annour ago	

### Adding a user

**Note:** If two-factor authorization (2FA) has been enabled for your UniView Portal instance, new users are automatically prompted to configure the 2FA application when they log in for the first time.

To add a user:

**1** Log in to the UniView Portal with an account that has the Admin or Superuser role.

Notes:

- As Admin, you can add a user account and assign it any role other than Superuser.
- As Superuser, you can add a user and assign it any role, including that of Superuser.
- 2 Click 🙆:

UNIVIEW	Dashboard	Protect	Jobs	Organizations	Click here	- ලා 🤨	?	db	nitre <mark>14</mark>
Dashboard					Scope	~	Organizati All	ion ~	53

3 In the Users view, click + New.

UNIVIEW	Dashboard Protect Jobs	Organizations	¢	<b>9</b>	🦪 🔵 dba <b>nni i</b>	iitre	ĸ
Settings				C	Click here +	- New	•
Alerts Integrations	Users Scopes	API Access					
Active Users							

4 Enter the user's email and role.



The role you select determines which features and procedures the user can run. (See "About UniView Portal user accounts" for details.)

5 (If needed) Check the Add to User Exception List for KaseyaOne Unified Login box if you require login with KaseyaOne but would like to create an exception for this user. For details, see "To enable or disable Require Login with KaseyaOne".

Note: This banner displays at the top of the page if Require KaseyaOne Login is enabled:

Require Log In with KaseyaOne is enabled. If this user does not have a KaseyaOne user account, they will be prevented from logging in. To allow this user to login with local module credentials, add this user to be the User Exception list under Require Log in with KaseyaOne.

- 6 Add one or more scopes:
  - To manually assign scopes, click + Add another scope. In the Scopes dialog, check boxes and click Select to assign selected scopes to the user.
  - To add access to all scopes, click to enable the **Global Scope** toggle.

**Note:** The scopes option does not display for the Superuser role as all scopes are accessible to Superuser accounts. You must assign at least one scope to non-Superuser accounts.

7 Click Save.

		Add User ×	
		Email dbasttuniview@gmail.com —1 Enter email	
		Role *	
		Manage 2	
		<ul> <li>Has Monitor access and can start backup jobs and modify retention settings.</li> <li>Add to User Exception List for Kaseya0ne Unified Login</li> </ul>	
		Scopes Global Scope	
		Columbia-Unitrends × Crossroads × Add scopes: + Add another scope OR	
		Click + Add another scope to select scopes in	h the Scopes dialog.
Scope	es .	Cancel Save4	
	Columbia-Unitrends		
$\checkmark$	Crossroads		
	Delta Blues		
	Ellada		
4		· · · · · · · · · · · · · · · · · · ·	
		Cancel Select	

8 The user is added in *pending activation* status and a *Welcome to UniView* email is sent to the user. The user must click the **Activate Now** button in that email within 48 hours to activate their account. When activated, the user's status changes to *active* on the Users page.



Note: If the user's activation link expires, you can click the user's icon and select **Resend Activation** to send the user a new link.

ettings				+ 1
Alerts Integrations Use	ers Scopes API Access			
Active Users				
	Role ≑	Status 🗢	Last Seen 🜩	
Email 🗢	Role 🗸	otatao +		
Email ≑ ax k@datto.com	Superuser	Active		:

## Editing a user

Use these steps to modify the user's role, scopes, and whether the user has an exception for KaseyaOne Unified Login:

**1** Log in to the UniView Portal with an account that has the Admin or Superuser role.

**Note:** As Admin, you cannot modify a superuser account or assign the superuser role to a user account.

2 Click 🙆:

	Protect Jobs	Organizations	Click here	2	🧑 🔵 db 🔤 nitre	к
Dashboard			Scope All	~	Organization	

3 In the Users view, locate the user, click its icon, and select Edit.



	Dashboard Protect	Jobs Organizations		\$ 😇 🕐	odba 📫 🖬 initre
ttings					+ Nev
Alerts Integrat	ons Users Scope	es API Access			
ctive Users					
Email ‡		Role ≑	Status ≑	Last Seen ≑	
		Role +	Status +	Lust Seen •	
() di unit	illirends.com	Superuser	Active	just now	:
-	ill ends.com 52@gmail.com				1
dc 💻 📰 eb		Superuser	Active	just now	: 1: 2Edit
dc et	52@gmail.com	Superuser Manage	Active	just now just now	1

4 (Optional) Apply a different role. Select a role, then click Save.

The role determines which features and procedures the user can run. (See "About UniView Portal user accounts" for details.)

Edit User	×
Fmail	
dcmail.com	
Role *	
Manage	Select role
Has Monitor access and can start backup jobs and modify retention settings.	
Password	
Reset password	
6 and at max 100 characters long	
<ol> <li>one non alphanumeric character</li> </ol>	
one lowercase and uppercase	
Add to User Exception List for KaseyaOne Unified Login	
Scopes	Global Scope
Columbia-Unitrends × Crossroads ×	
+ Add another scope	
	9
	4
	Cancel Save

- 5 (Optional) Modify the user's Add to User Exception List for KaseyaOne Unified Login setting.
  - Check the Add to User Exception List for KaseyaOne Unified Login box if you require login with KaseyaOne but would like to create an exception for this user.
  - Clear the Add to User Exception List for KaseyaOne Unified Login box to remove the exception from this user.



Note: This banner displays at the top of the page if Re require Log In with KaseyaOne is enabled. If this user does not have a KaseyaOne user account, they will be prevented the User Exception list under Require Log In with KaseyaOne.	
Edit User ×	
Email	
dc mail.com	
Role *	
Manage ~	
① Has Monitor access and can start backup jobs and modify retention settings.	
Password Reset password	
6 and at max 100 characters long	
one non alphanumeric character     one lowercase and uppercase	
Add to User Exception List for KaseyaOne Unified Login	
Scopes Check box to create user exception or clear box to remove user exception	
Columbia-Unitrends × Crossroads ×	
+ Add another scope	
Cancel Save	

6 (Optional) Modify scope assignment. You can add or remove scopes, or click **Global Scope** to add access to all scopes. Click **Save**.

**Note:** The scopes option does not display for the Superuser role as all scopes are accessible to Superuser accounts. You must assign at least one scope to non-Superuser accounts.



Release 2.50 | April 2024

		Edit User	×
		Email do na incluzio ail.com	
		Role *	
		Manage <ul> <li>Has Monitor access and can start backup jobs and mon</li> </ul>	dify retention settings.
		Password	Reset password
		<ul> <li>6 and at max 100 characters long</li> <li>one non alphanumeric character</li> <li>one lowercase and uppercase</li> <li>Add to User Exception List for Kenve to remove s</li> </ul>	Click cope Global Scope
Case		Columbia-Unitrends X Crossroads X + Add an	other scope
Scop	Columbia-Unit	(Optional) Add scopes: click +, check boxes, and click Select	Cancel Save
	Crossroads		
	Delta Blues		
4	Ellada		
			Cancel Select

- 7 (Optional) Reset the user's password:
  - Click Reset Password.
  - Enter and confirm the new password.
  - Click Save.

### **Disabling a user**

To disable a user:

1 In the Users view, locate the user, click its icon, and select **Disable**.



JNIVIEW Dashboard Protect	Jobs Organizations		¢ 📮 🤨	) 🔵 dba 🖬 Tunitre
Settings				+ New
Alerts Integrations Users Scope	es API Access			
Active Users				
Active Users	Role 🕆	Status 🕆	Last Seen 🗢	•
	Role = Manage	Status = Active	Last Seen ÷	1;
Email =			Last Seen 🗢	Edit
Email ≎ do= <u>```, =`5</u> 0@gmail.com	Manage	Active	Last Seen 🗢	Edit
<b>Email</b> ≎ do <b>n i i , sh</b> © @gmail.com do <b>n i </b> @itrends.com	Manage Superuser	Active Disabled	Last Seen ≑ 21 days ago	

#### 2 Click **Disable** to confirm.

Disable User	×
Are you sure you want to <b>disable</b> user <b>donail.com</b> ? Click to confirm Cancel	Disable

3 The user is disabled.

	/IEW Dashboard F	Protect Jobs Organizations		©	<b>9</b>	odba 🖬 🗂 initre
etting	IS					+ New
Alerts	Integrations Users	Scopes API Access				
Active U	lsers					
Active U		Role o	Status ⇒	Last Seen 🖨		
Active U	Isers Email : dl	<b>Role</b> ≎ Superuser	Status ⇒ Active	Last Seen - just now		

## Enabling a user

To enable a user:

1 In the Users view, locate the user, click its : icon, and select **Enable**.



Release 2.50 | April 2024

NI\	/IEW Dashboard	Protect Jobs Organizations		¢) 📒 (1	🦻 🛑 dba 📫 initre 📧
etting	js				+ New
Alerts	Integrations Users	Scopes API Access			
Active U	Jsers				
Active U	Jsers Email ≑	Role ≑	Status ≑	Last Seen ≑	
Active U		<b>Role</b> ≑ Superuser	Status ≑ Active	Last Seen ÷ just now	
	Email 0				· · · · · · · · · · · · · · · · · · ·

2 Click Enable to confirm.

Enable User	×
Are you sure you want to <b>enable</b> user <b>dominiquel.CO@gunail.com</b> ?	Click here Cancel Enable

3 The user is enabled.

NIN	/IEVV Dashboard F	Protect Jobs Organizations			\$ \$	?	oba 📫 nitre
Setting	js						+ New
Alerts	Integrations Users	Scopes API Access					
Active L	Jsers						
Active L							
Active L	Jsers Email >	Role 0	Status 0	Last Seen 🗢			
Active L		Role ≎ Superuser	Status ≎ Active	Last Seen ≎ just now			

## **Resetting 2FA**

Use this procedure to remove a user's two-factor authentication (2FA). Use this option if the user has lost their device. Once 2FA has been reset, the user will be prompted to configure 2FA on their new device. Any recovery codes from the previous configuration are no longer valid.

- 1 In the Users view, locate the user, click its icon, and select **Reset 2FA**.
- 2 Click Confirm.



INIVIEW Dashboard	Protect Jobs Organizations	6	ð 📒 🧿	🔵 dba 📫 🖬 initre
<ul> <li>2FA successfully reset</li> </ul>	×			
Settings				+ New
Alerts Integrations Users	Scopes API Access			
Active Users				
	Dole - Status -	lact Seen ≜		
Email 🤉	Role Status S	Last Seen ¢		1
<b>Email</b> ≑ do <u>iii, i∩</u> @gmail.com	Role ÷         Status ÷           Reset 2FA         •	Last Seen ≎		
Email 0			•	Edit
<b>Email</b> ≎ do <u>iii, h°</u> @gmail.com	Reset 2FA You are about to reset two factor authentication for domain and a Bamail.com		- (	Edit Disable
<b>Email</b> ≎ do <b>n i i, sh</b> <sup>co</sup> @gmail.com do <b>n i</b> trends.com	Reset 2FA		(	

## Resending an activation email

When the user was added, a *Welcome to UniView* email was sent to the user. The activation link in this email expires in 48 hours.

To send a new activation link to a pending user, click the user's icon and select **Resend Activation**. The user must activate their UniView account within 48 hours of receiving this email.

NIV	Dashboard Protect	Jobs Organizations			¢	(	🤊 🔵 db	nitre
etting	6							+ New
Alerts	Integrations Users Scope	es API Access						
Active Us	sers							
Active Us								
Active Us	sers Email ÷	Role 🗘	Status 0	Last Seen 🜩				
Active Us		Role ≎ Superuser	Status ≑ Active	Last Seen ≑ just now				i
	Email 🗧						•	:
	Email ÷ dbTends.com	Superuser	Active	just now			1	: :
	Email ≎ dbends.com oryabinin@uniteends.com	Superuser Superuser	Active Active	just now	0	2	1 Resend	: : Activation
	Email ÷ dblends.com oryabinin@uniteends.com denis3@kaseya.com	Superuser Superuser Monitor	Active Active Pending Activation	just now just now	D	2	1 Resend	i i Activation

## Working with scopes

To control access to organization data in the UniView Portal:

- Each organization is assigned to one scope.
- Each portal user account is configured with one or more scopes. A user's scope determines which organizations are visible throughout the UniView Portal.



• The scopes option does not display for the Superuser role as all scopes are accessible to Superuser accounts. You must assign at least one scope to non-Superuser accounts.

**Note:** A user logs on with both an assigned role (the functions they can perform) and an assigned scope (the data they can see). Membership in a role and membership in a scope are independent of each other.

Use the Scopes view to manage scopes. See these procedures for details:

**Note:** To view and manage scopes, the feature must be enabled for your UniView Portal user account. If needed, contact your administrator to enable this feature.

- "Viewing scopes"
- "Adding a scope"
- "Editing a scope"
- "Disabling or enabling the scopes feature"

#### Viewing scopes

The Scopes view displays all scopes that have been added to your backup.net instance. The following information is given for each scope:

- Name Name of the scope.
- Pencil icon Click to edit the scope name. (Displays for superusers only.)
- III icon Click to delete the scope. (Displays for superusers only.)

Note: You must remove all users and organizations from the scope before it can be deleted. Use Edit Organization to assign a different scope to applicable organizations (see "Editing an organization"). Use Edit User to remove the scope from applicable users (see "Editing a user").

UNIVIEW Dashboard Protect Jobs Organizations	¢	<b>9</b>	?	dba <b>antin</b> ni	itre	к
Settings				Disable +	New	
Alerts Integrations Users Scopes API Access						
Scopes						
Name = Columbia-Unitrends				Ø (	<u></u>	
Crossroads				Ø 1		
Delta Blues				Ø (	Î	
Ellada				Ø 🖞	ÌÌ	



## Adding a scope

To add a scope:

- **1** Log in to the UniView Portal with an account that has the superuser role.
- 2 In the Scopes view, click + New.

UNIVI	EW	Dashboard	Protect Jo	bs Organizations		¢	<del></del>	?	odba <b>nni i</b> nitre	ĸ
Settings									Disable + New	
Alerts	Integrations	Users	Scopes	API Access					Click here	.
Scopes										
Name ≑										
Columbia	a-Unitrends								Ø 🛍	

3 Enter the scope name. Click Add.

New Scope		Х
Name your scope below. To add organ Scope Name Northwest Region —1	izations to a scope, pleas	se add an appliance first.
		Cancel Add

4 The scope is added and displays in the list.

UNIVIEW Dashboard Protect Jobs Organizations	¢	<b>9</b>	?	odba <b>nni in</b> nitre	ĸ
Settings				Disable + New	
Alerts Integrations Users Scopes API Access					- 1
Scopes					
Name 0					
Columbia-Unitrends				Ø 🛍	
Crossroads				Ø 🛍	
Northwest Region Scope is added				Ø 💼	

## Editing a scope

Use these steps to modify a scope name:

**1** Log in to the UniView Portal with an account that has the superuser role.



Release 2.50 | April 2024

2 In the Scopes view, locate the scope and click its pencil icon.

UNIVIEW Dashboard Protect Jobs Organizations	🔞 🚆 🧿 🔵 dba <b>mmi i</b> nitre 🗙
Settings	Disable + New
Alerts Integrations Users Scopes API Access	
Scopes	
Name =	
Columbia-Unitrends	Ø 🔟
Crossroads	Ø 🛍
Northwest Region	Click here

3 Modify the scope name, then click **Save**.

lit Scope	×
orthwest Modify name	
In order to delete this scope please remove all organizations from the scope, you can do your organization detail.	o so by editing
2	
Cance	el Save
Dashboard Protect Jobs Organiza	······································
	ations 🔞 😷 🧑 barranti in vitre
Settings	dions 203 📮 🕐 oberra intre Disable + New
	Disable + New
Alerts Integrations Users Scopes API Access	Disable + New
Settings	Disable + New
Settings Alerts Integrations Users Scopes API Access Scopes	Disable + New
ettings Alerts Integrations Users <u>Scopes</u> API Access	Disable + New

## Disabling or enabling the scopes feature

Name is modified

Northwest -

Use this procedure to disable or enable the scopes feature for a UniView Portal user.

- **1** Log in to the UniView Portal as the user whose scopes feature will be disabled or enabled by this procedure.
- 2 In the Scopes view, click **Disable** or **Enable**, then click **Disable** or **Enable** to confirm.
  - Note: If scopes are enabled for the user, the Disable button displays. If scopes are disabled for the user, the Enable button displays.

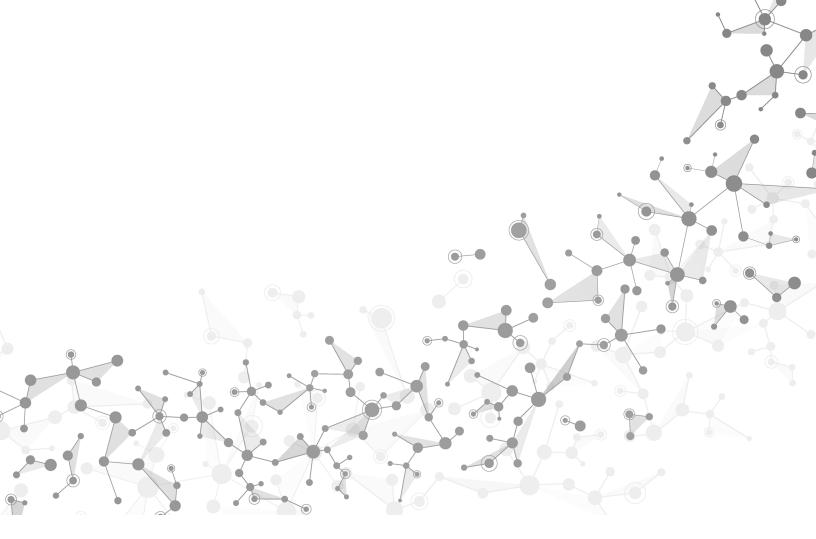


Ø 🛍

	Protect Jobs Organizations	\$ 😤 🧑 (	dba <b>nni i</b> nitre 14
Settings		0	Disable + New
Alerts Integrations Users	Scopes API Access		
Scopes	Disable Scope Feature	×	
Name ≑	You are about to <b>Disable</b> the scope feature, please confirm.		
Columbia-Unitrends		2	Ø 🛍
Crossroads		Cancel Disable	Ø 🛍
Northwest		Cancel Disable	Ø 🛍



This page is intentionally left blank.





# **Working with Integrations**

To customize your UniView Portal environment, you can integrate Kaseya modules. Once you've integrated a module, you can perform various tasks right from UniView, rather than logging in to a separate system.

Use the Settings > Integrations view (described below in "Viewing integrations") to manage your integrations. For details on adding and working with integrations, see these topics:

- "Integrating VSA 9"
- "Integrating VSA 10"
- "Integrating KaseyaOne"
- "Working with your KaseyaOne integration"
- "Integrating Autotask"
- "Working with your Autotask Integration"
- "Integrating ConnectWise Manage"
- "Working with your ConnectWise Manage integration"
- "Integrating Kaseya's Billing Management System (BMS) or Vorex"
- "Working with your BMS or Vorex integration"
- "Importing Accounts or Companies from your PSA"
- "Integrating Datto Portal"
- "Working with your Datto Portal integration"
- "Integrating IT Glue"
- "Working with your IT Glue integration"

### Viewing integrations

Integrations are managed from the Settings page. To access the Settings page, click 🕺 :

	d Protect	Jobs	Organizations	Click here	-@ <b>(</b>	<b>-</b>	?	db 💶	nitre 14
Dealtheand				Scope			Organizat	tion	<b>F 1</b>
Dashboard				All	~		All	~	13

The Integrations view displays Kaseya modules that are available for integration with your UniView Portal. The following information is given for each integration:

- Module icon and name.
- A description of the module.
- An action button indicating the next step needed to start using the integration.



JNIVI	EW	Dashboard Protect Jobs Organizations	@ 😌	🧭 🔵 dt 💶 Etre
Settings				
Alerts	Integrations	Users Scopes API Access		
T	KaseyaOne <sub>Kaseya</sub>	Configure the integration with Kaseya One portal to enable the option to login using KaseyaOne credentials.		Integrate
VSA	VSA Kaseya	Action butto Kaseya VSA integration is complete. You can now view your Kaseya agents under Appliances > VSA. Click on Show Configuration to setup conditional alerts synchronization. The portal is integrated with https://uG-vsa.dkaseya.net		oad Manifest Enabled
		SHOW CONFIGURATION		
BMS	BMS Kaseya	Create tickets in Kaseya BMS based on alerts and warnings issued by BackupIQ.		Integrate
	IT Glue <sub>Kaseya</sub>	Synchronize data with Kaseya IT Glue documentation tool.		Integrate
X	Autotask Autotask	Create tickets in Autotask PSA based on alerts and warnings issued by BackupIQ.		Integrate

## **Integrating VSA 9**

Use these procedures to integrate your VSA 9 SaaS or on-premise instance with the UniView Portal.

#### Notes:

- SaaS instance managed by Kaseya If you are using a SaaS VSA instance that is managed by Kaseya, do not run these VSA integration procedures. Instead, work with Support or your Evaluation Engineer to perform the VSA integration.
- These integration procedures apply to VSA 9 only. Do not use these procedures for VSA 10.
- Conditional alarms for an on-premise instance that is not accessible on the Internet UniView Portal requires Internet access to push alarms to the VSA. If your VSA is not connected to the Internet, you cannot add UniView Portal conditional alarms to the VSA instance.
- "Step 1: (If needed) Remove the existing VSA 9 integration"
- "Step 2: Install the latest TAP module"
- "Step 3: Complete the integration"

### Step 1: (If needed) Remove the existing VSA 9 integration

If you have already integrated VSA 9, use these steps to remove the UniView TAP module from your VSA instance.



#### Notes:

• You must remove the existing TAP module before installing the latest UniView TAP module.

 If the logos and branding you see in your currently deployed VSA module do not look like this new UniView module, you may be using a prior version of the TAP module for the Unitrends Backup Portal platform. As of January 2023, module branding has been modified, but no other functional changes exist. We do not recommend customers uninstall the older module to use the newer module as this will impact existing mappings (e.g., UniView user accounts mapped to KaseyaOne accounts for single sign-on, and assets mapped to VSA IDs).

1 Log in to the VSA UI.

Note: Do not use a VSA URL that includes -cdn. Use the URL that goes directly to your VSA server instance.

- 2 Select System > Server Management > License Manager > Third Party.
- 3 Select the row containing UniView, Unitrends Backup (older versions), or Unitrends MSP (older versions).
- 4 Click **Remove**, then **Yes** to confirm.

0	General	Third Party	Licenses	License By Group Re	ole Types		
Q lice	🖍 Install 🚫 R	emove -3					
System	Tenant Name	Application Name	Company Name	Application Description	Application Version	Required VSA Version	Copyright Information
Server Management	default	Basic Tap	Kaseya	A sample TAP application	1.0	9.5	Copyright 2017, Kaseya
License Manager	default	Unitrends Backup	Unitrends	Unitrends Backup	2.0	9.5	Copyright 2020, Kaseya
Audit	default	Unitrends/Darling Valuation	Unitrends	Unitrends Backup Valantina	2.1	9.5	Copyright 2020, Kaseya
View Individual Data Software Licenses		-	Are you	Sure?	×		
			Are you		×		
Security				Palata shini ana sa fining			
License			2	Delete third-party appliction	12		
Software Deployment		4		Yes No			
Administration							
Licensing							

### Step 2: Install the latest TAP module

- **1** Log in to the UniView Portal as a superuser.
- 2 Click 🙆:

	Protect	Jobs	Organizations	Click here	-@ <b>9</b>	. (	? 🔵 db=	nitre	к
Dashboard				Scope All	~		ganization All	~ E	3

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



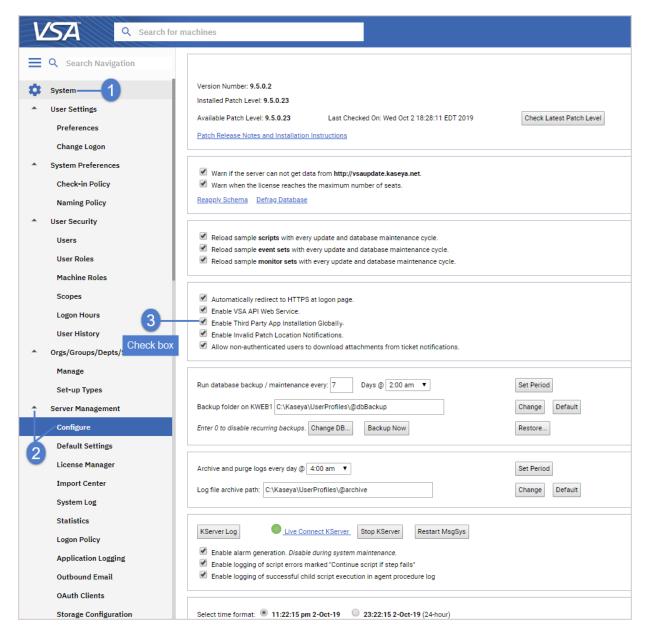
JNIVI	EW	Dashboard	Protect	Organizations		ලා 🤨		🔵 dt <b>anningan</b> itre	ĸ
Settings									
Alerts	Integrations	Users	Scopes	API Access					
ſ	KaseyaOne <sub>Kaseya</sub>		Configure the	ation with Kaseya One portal to enable the optic	n to login using KaseyaOne credentials.			Integrate	
VSA	VSA Kaseya		No Kaseya V imported into		wnload a Kaseya VSA TAP manifest, which can then Click here	be _ D	ownload M	lanifest Enabled	

- 5 Use these steps to add the UniView TAP module to the VSA:
  - Log in to the VSA UI.

**Note:** Do not use a VSA URL that includes *-cdn*. Use the URL that goes directly to your VSA server instance.

 On-premise instance only – Select System > Server Management > Configure and make sure you have checked this box: Enable Third Party App Installation Globally. (Skip this step if you have a SaaS VSA instance.)





- Select System > Server Management > License Manager > Third Party > Install.
- Click Install. Browse to the path where you downloaded the TAP module. Select UniView.vsaz. Click Open. Click Next.



SA Search for	r machines			⊕ 🗋	8 🔴 🕅		? 🔒 📖 💻	nds.com 👻
Q Search Navigation 3	Third Party	Licenses	License By Group	Role Types				
	Install 🚷 Remove							
System — 1	Tenant Name	Application Name	Company Name	Application Description		Application Version	Required VSA Version	Copyright Information
User Settings	X00010549	Cloud Backup	Kaseya	A direct-to-cloud backup so	olution	1.0	9.5	Copyright 2019, Kasey
System Preferences								
User Security	Install Application			? 🗆 X				
Orgs/Groups/Depts/Staff	- Instructions							
Server Management Default Settings		aaz file to start the regis	tration process.					
License Manager	Manifest file name:							
Import Center				Browse File				
System Log	<			Favourites			Downloads	C Q Search
		<b>IniView</b> Initrends		Applica     Applica     Deskto     Docum     Docum     Docum     Cloud	tions of the second sec	<ul> <li>6. Прыцича. 2020 гmp4</li> <li>7. Практикаmskn.mp4</li> <li>8. Кожные с03.2021.mp4</li> <li>Docker Desk.Installer.exe</li> <li>RegressionTting_2.31.xisx</li> <li>test-automation.7z</li> <li>UniViewvzaz</li> </ul>	4 Browse to s	elect and open fil
				<ul> <li>Shared</li> <li>Тадя</li> <li>Краснь</li> <li>Оранж</li> <li>Желты</li> <li>Зелень</li> </ul>	рвый й		UniView.vsaz Document - 2 KB Information	Shor Today, 33
				Синий				Cancel

• Enter your homerealm in the homerealm Custom Value field. Click Next.

stall Application		? 🗆
- Instructions Please enter the value for your custom	fields.	
Custom Field	Custom Value	
homerealm	utvalantine1	Enter your homerealm
		•
	Cancel	Back Next

• Click Next.



ServiceDesk Definitions to be installed There are no Service Desk Definition to be installed Alert Definitions to be installed Generic system level alert Click Next	stall Application		2 🗆 3
There are no Service Desk Definition to be installed Alert Definitions to be installed Generic system level alert			1
Alert Definitions to be installed Generic system level alert	ServiceDesk Definitions to be installed		
Generic system level alert	There are no Service Desk Definition to be	e installed	- 11
Generic system level alert			
Generic system level alert			
Generic system level alert			
			_
Click Next	Generic system level alert		
Click Next			
		<b>Click Next</b>	
Cancel Back Next			

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

Install Application		? 🗆 🗙
UV	UniView Unitrends	
UniView		
You're module is re	eady to be activated!	
Click Finish to regi	ister your module with the provider and activate it for use.	
	Click Finish	
	Cancel Back F	inish

### Step 3: Complete the integration

Run this procedure to link your VSA and UniView Portal credentials, enabling single sign-on (SSO) access to the UniView module from your VSA session.

#### Notes:

• You must run this procedure from the VSA. Authorizing UniView Portal access to the VSA by logging in directly to backup.net is not supported.



- If you must access the VSA from the local network by IP address or DNS alias, SSO is not supported. Do not run this "Step 3: Complete the integration" procedure. Instead, you must enter your UniView Portal credentials to access the UniView module from your VSA session.
- This procedure uses third-party cookies for authentication and to help you sign up for our services. If prompted, click to allow third-party cookies in your browser.
- A 1-to-1 VSA to UniView Portal account ratio is now enforced. (A VSA user account can be linked to only one UniView Portal user account. A UniView Portal user can be linked to only one VSA user account.) If needed, administrators can create additional accounts to meet this requirement.
- 1 In the VSA, select the **UniView** module.
- 2 Enter the backup.net homerealm. Click Next.



- **3** Log in to UniView Portal as a superuser.
  - Enter your UniView Portal username and password.
  - Click Log in.



230



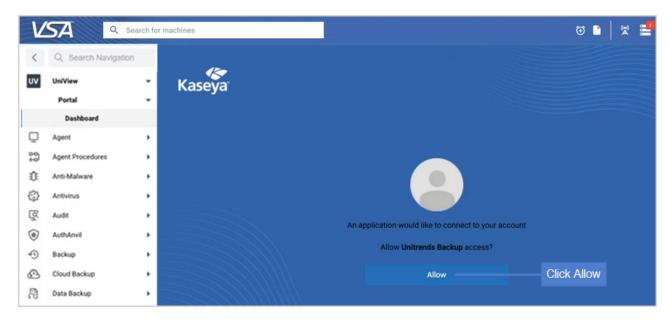
V	<b>′SA</b> ۹	Search for machines	ti 👷 🚽 🖬 ti 🖉
<	Q Search Navigatio	n	
υv	UniView	•	UNIVIEW
	Portal	-	Ø st. je-backup.net
	Dashboard		
Q	Agent	· /////	Email
3	Agent Procedures	· //////	downed with wilds.com
Û	Anti-Malware	• \\\\\\\\	Password Forpot password?
$\bigcirc$	Antivirus	· ////////	
Q	Audit	· /////////	Log In
۲	AuthAnvil	• /////////////////////////////////////	
9	Backup	• /////////////////////////////////////	Cog in with IT Complete
٩	Cloud Backup	• /////////////////////////////////////	🦉 rað munn sauðurs
ลิ	Data Backup	· ////////////////////////////////////	Help. & Support   © Kaseya 2023
眇	Datto BCDR		

4 Enter your two-factor authentication (2FA) code, then click **Verify**. (You can obtain the code from your authenticator app or use a recovery code.)

Kaseya		
	Verification	
	Enter your verification code or your pre-generated backup password below Code	
	8 8 1 Enter code (no spaces)	
	2 Back	
	Help & Support   © Kaseya 2024	

5 Click **Allow** to grant UniView Portal access to the VSA instance.





The UniView Portal Dashboard displays.

## **Integrating VSA 10**

The UniView Portal provides UI and API integration across these backup and recovery solutions: Unitrends backup appliances, Spanning SaaS backup for Microsoft 365, Google Workspace and Salesforce, and backup for public cloud workloads. Add the UniView Portal module to VSA 10 so that you can manage your backup and recovery environments from a single interface.

Contact your Account Manager or Customer Support to add the UniView Portal module to your VSA 10 instance. Once the module is added, you can quickly access the UniView Portal right from your VSA by selecting **Integrations > Unitrends Backup**:

	Unitrends Backup Integrations	🔍 Find systems by name or logged in user 🔁 Upgrade From VSA 9 🛛 🛱 🖓 🌚 🤮 Jon
MODULES	UNIVIEW Dashboard Status Jobs Organizations	🔞 🤔 🧑 🔴 ji 🚬 rend 🛽
88 Dashboards		
Client Portal		Scope Organization
D Systems	Dashboard	All 🗸
Networks	·	
P Automation		
Reporting	Appliances 0 offline	6 O Low Space Appliances 2 E Local Storage Used 18.5 TB
Advanced Reporting		
Integrations		
Autotask Integration	Active Jobs	Completed Jobs
Connectors		
ConnectWise	Job Name Appliance Assets Progress Duration	417
Datto	Agent - L SQL1 UB2 19158b 4 00:00:16	278
IT Glue Integration		
Unitrends Backup	On-Box Data Copy Recovery-9032S 1	139
Integration Log	Access Job	
Endpoint Protection	· · · · · · · · · · · · · · · · · · ·	
Patch Management	See All	Aug 12 Aug 13 Aug 14 Aug 15 Aug 16 Aug 17 Aug 18 Aug 19 Aug 20 Aug 21 Aug 22 Aug 23 Aug 24 Success Market Missed
MINISTRATION		
Server Admin	,	



## Integrating KaseyaOne

KaseyaOne is its own identity provider (IdP) and you can use your KaseyaOne account to log in to all of your other Kaseya modules. Use this procedure to integrate KaseyaOne. Integration enables users to log in to UniView Portal by using KaseyaOne credentials and provides the option to automatically create UniView Portal users for each KaseyaOne user. For details, see "Working with your KaseyaOne integration".

**Note:** KaseyaOne also supports third-party IdP integrations, such as Okta, Microsoft EntralD, and Passly. If you have integrated your third-party IdP with KaseyaOne, simply add the KaseyaOne integration and enable Require Login with KaseyaOne to manage your UniView users with this IdP provider. (To add an IdP integration to KaseyaOne, see this article: Set up third-party IdP integrations.)

#### To integrate the KaseyaOne portal

- **Note:** To perform this procedure, you must log in to UniView Portal as a superuser and log in to KaseyaOne as a master role user.
- **1** Log in to the UniView Portal as a superuser.
- 2 Click 🙆:

UNIVIEW	Dashboard	Protect	Jobs	Organizations	Click here	—@ 🜻	🤊 🧲	db	14
Dashboard					Scope	~	Organizati All	ion V	*

- 3 Select the **Integrations** view.
- 4 Locate the KaseyaOne integration and click Integrate.

L	JNIVI	ΞW	Dashboard	Protect Jo	bs Organizations	¢	٩	?	odi in tre.	1(
	Settings									
	Alerts	Integrations	Users	Scopes	API Access					
	Ţ	KaseyaOne <sub>Kaseya</sub>		Configure the ir	tegration with KaseyaOne portal to enable the option to login using KaseyaOne credentials.		I	Click h	iere integrate	

- 5 Log in to the KaseyaOne portal as a master role user. (If your KaseyaOne account does not have the master role, you receive an Access *denied* message.)
  - Enter your username and company name. Click Next.



Kaseya	<b>*Kaseya</b> One	
	Username * d tt	
	<u>Help &amp; Support</u>   € Kaseya 2024	

• Enter your password. Click Log In.

Kaseya		
	<b>Kaseya</b> One	
	dt t unit v	
	Password * Forgot Password	
	Log In Back	
	<u>Help &amp; Support</u>   © Kaseya 2024	

6 Enter your two-factor authentication (2FA) code, then click **Verify**. (You can obtain the code from your authenticator app.)



234

Kaseya		
	Verification   Please open your authentication app and enter the code below.   Authentication code *   40 17 1   Verify   Q   Back to Login	
	<u>Help &amp; Support</u>   € Kaseya 2024	

- 7 The integration is configured and login with KaseyaOne is enabled.
- 8 To access KaseyaOne, click III.

UNIVI	EW	Dashboard	Protect	Jobs	Organizati	ons			¢	<b></b>	?	odbarrattigarritte	e 📕	•
Settings										Click	to acc	ess KaseyaOne		*
Alerts	Integrations	Users	Scopes		API Access									I
Ţ	KaseyaOne <sub>Kaseya</sub>		The integrati login form.	ion with	n the KaseyaOr	ie portal is	s config	gured. Enable the option to login using the KaseyaOne credentials. It will show 'L	ogin wi	th Kas	eyaOne I	d" button on the	Ì	l
> Show	configuration	0	Login with Kas	eyaOne	e is enabled	×								

9 You can see that the UniView module has been added to KaseyaOne. To connect to UniView from KaseyaOne, click the **UniView** module:

<b>Kaseya</b> One		r 🗘 🕜 8 🖛 📖
Home     Kaseya Store     View and Pay Invoices	Good Morning, unitrends     ■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■	Your IT Complete Kit Optimizer
් View Subscriptions වී Payment Methods ශ් Cooper	Compliance Manager O EndPoint Backup O IT Glue O Unified Backup Unified Backup	66% Overall Progress Keep It Up! 🏂
<ul> <li>Support</li> <li>Admin Settings</li> </ul>	RocketCyber VSA O AudiT C Security URMM/Endpoint Management MSP Enablement	Completed Remaining
Cyber Insurance Fast Track     RITSM-Certified Professionals     Kaseya University	UV Unitied Backup	Your Insights To Do 5 Completed 10 Snoozed

The Dashboard displays:



Appliances	3 offline	▲ Alerts		30	© Low Space Appliances 2
ctive Jobs					Completed Jobs (C
Job Name	Appliance	Assets	Progress	Duration	795
Replica Restore	recovery-8120s- 5	3		00:07:33	530
Backup image	recovery-8120s-	2		00:04:15	265
Backup 139-99 image	recovery-8120s-	1		00:00:26	0 Apr 06 Apr 07 Apr 08 Apr 09 Apr 10 Apr 11 Apr 12 Apr 13 Apr 14 Apr 15 Apr 16 Apr 17 Apr 1
	See A	All			Success Missed

## Working with your KaseyaOne integration

Once you've integrated KaseyaOne, use these procedures as needed:

- "To disable or re-enable Login with KaseyaOne"
- "To enable or disable Require Login with KaseyaOne"
- "To enable or disable automatic user creation"
- "To reset the KaseyaOne integration"
- "Working with Cooper Insights in KaseyaOne"

#### To disable or re-enable Login with KaseyaOne

Disabling the Enable Login with KaseyaOne toggle prevents all UniView Portal users from logging in by using KaseyaOne credentials but does NOT remove any user mappings.

Run this procedure to temporarily disallow KaseyaOne login for all users. You can then re-enable the Login with KaseyaOne toggle so that users can resume using their KaseyaOne credentials for the UniView Portal.

- **1** Log in to the UniView Portal as a superuser.
- 2 Click 🗐:



	Protect Jobs	Organizations	Click here	-@ 🜻	🧑 🔵 d	b jitre	ĸ
Dashboard			Scope All	~	Organization All	~ C	

- 3 Select the Integrations view.
- 4 Locate the KaseyaOne integration and click **Show configuration**:

UNIV	IEW	Dashboard	Protect	Jobs	Organizations	¢	<b>;</b>	?	🔵 db:	itre	1(
Settings	;										^
Alerts	Integrations	Users	Scopes	5	API Access						1
Ţ	KaseyaOne <sub>Kaseya</sub>		The integrat login form.	tion with	the KaseyaOne portal is configured. Enable the option to login using the KaseyaOne credentials. It will show "I	ogin wit	th Kase	yaOne l	d" button on the	Ŵ	
> Show	configuration Click here										

- 5 Under Unified Login, click 🕑 to disable or 🔘 to enable log in with KaseyaOne.
  - **Note:** This toggle must be enabled to use the Require Log In With KaseyaOne feature. Disabling this toggle also disables the Require Log In With KaseyaOne feature.

	EW Dashboar	rd Protect Jobs	Organizations					Ę	þ 😤	?	od di	nitre
ettings												
Alerts	Integrations Users	s Scopes	API Access									
Г	KaseyaOne <sub>Kaseya</sub>	The integration with login form.	h the KaseyaOne port	al is configured. Enab	ble the option to login us	sing the KaseyaOne	credentials. It wi	ll show "Logir	with Kas	seyaOne Io	d" button on ti	ne 💼
✓ Hide c	configuration											
Unified L	ogin Click to ena	ble Login with Kaseya	One									
Er	Click to ena Click to ena nable Login With KaseyaOne nis option will allow your users to	e										
En Th	nable Login With KaseyaOne	e										
Th Automati	nable Login With KaseyaOnd nis option will allow your users t ic User Creation led, your users in KaseyaOne wh	e to Log In with KaseyaOne no are granted access to I	. Learn More. UniView will automat									
Automati Once enable created. Thi	nable Login With KaseyaOnd his option will allow your users to ic User Creation	e o Log In with KaseyaOne no are granted access to I rges in your KaseyaOne ii	. Learn More. UniView will automat									
Automati Once enable created. Thi access as t	nable Login With KaseyaOnn his option will allow your users t ic User Creation led, your users in KaseyaOne wh his could result in additional cha	e o Log In with KaseyaOne no are granted access to I rges in your KaseyaOne in yooses, Learn More.	. Learn More. UniView will automat									
Automati Once enable created. Thi access as t En	hable Login With KaseyaOn his option will allow your users t ic User Creation led, your users in KaseyaOne wh his could result in additional cha the default role for security purp hable Automatic User Creat efault Settings	e o Log In with KaseyaOne no are granted access to I rges in your KaseyaOne in poses. Learn More. ion	. Learn More. UniView will automat nvoice. It is recomme									
Automati Once enable created. Thi access as t En	nable Login With KaseyaOn his option will allow your users t ic User Creation led, your users in KaseyaOne wh is could result in additional cha the default role for security purp nable Automatic User Creat	e o Log In with KaseyaOne no are granted access to I rges in your KaseyaOne in poses. Learn More. ion	. Learn More. UniView will automat nvoice. It is recomme									
Automati Once enable created. Thi access as t En	hable Login With KaseyaOn his option will allow your users t ic User Creation led, your users in KaseyaOne wh is could result in additional cha the default role for security purp hable Automatic User Creati efault Settings noose default settings for new u	e o Log In with KaseyaOne no are granted access to I rges in your KaseyaOne in poses. Learn More. ion	. Learn More. UniView will automat nvoice. It is recomme									

## To enable or disable Require Login with KaseyaOne

If enabled, the Require Login with KaseyaOne toggle forces users to log in to the UniView Portal with their KaseyaOne Unified Login credentials. When enabling this feature, you are able to grant exceptions to specified users so that these users are still able to log in using their UniView Portal credentials.



- **1** Log in to the UniView Portal as a superuser.
- 2 Click 🙆:

	Protect Jobs	Organizations	Click here	© 🤨	🧑 🔵 db	hitre <mark>10</mark>
Dashboard			Scope All	~	Organization All	:

- **3** Select the **Integrations** view.
- 4 Locate the KaseyaOne integration and click **Show configuration**:

Alerts Integrations Users Scopes API Access	
Alerts Integrations Users Scopes API Access	
KaseyaOne KaseyaOne credentials. It will show "Login with KaseyaOne Id" button on to login using the KaseyaOne credentials. It will show "Login with KaseyaOne Id" button on to login form.	he 💼

- 5 Under Require Log In With KaseyaOne, click 🕑 to disable or 🔘 to enable Require Log In with KaseyaOne.
- 6 (If needed) If you are enabling the Require Log In With KaseyaOne feature, ensure that the Enable Login with KaseyaOne toggle is also enabled so that users can log in via KaseyaOne.

Note: If you've enabled Require Log In With KaseyaOne, it is best to also enable automatic user creation.

UNIVIEW Dashboard Protect Jobs Organizations	ŵ	₿	?	odb 🚬	itre	ĸ
✓ Hide configuration						
Unified Login 2 (If needed) Enable this toggle						
Enable Login With KaseyaOne This option will allow your users to Log In with KaseyaOne. Learn More.						
Automatic User Creation						
Once enabled, your users in KaseyaOne who are granted access to UniView will automatically have a UniView user created. This could result in additional charges in your KaseyaOne invoice. It is recommended to choose a lower level of access as the default role for security purposes. Learn More.						
Enable Automatic User Creation     (Recommended) Enable if using     Require Log In With KaseyaOne     Choose default settings for new users imported from KaseyaOne						
Role						
Monitor ~						
Require Log In With KaseyaOne This option will pre users from logging in directly and only allow them to authenticate via KaseyaOne. Learn More. Require Log In With KaseyaOne						
User Exceptions Users with exceptions can continue to log in using local module authentication						
Select users						
ن Use this link to log in without KaseyaOne Unified Login: https://logbackup.net/k						

- 7 (Optional) Allow specified users to log in with UniView Portal credentials by granting exceptions to these users:
  - Click Select users.
  - Click users to add them to the exceptions list.



UNIV	Dashboard Protect Jobs Organizations		¢	<mark>.85</mark>	?	🔵 dt	itre	16
	Log In With KaseyaOne	te via KaseyaOne. Learn More.						
	Require Log In With KaseyaOne Jser Exceptions Jsers with exceptions can continue to log in using local module authentication							
VSA	Select users 1 mouni <sup>*</sup> ***********************************	3 Selected users display here pe-backup.net/k s c Click to remove all users an now view your Kaseya agents under Appliances > VSA. Click on Show Configura	tion	Downl	oad Ma	anifest	Enabled	
> Shov	stan ya.com mounte kaseya.com mounte m	iseya.net						
BMS	suppoperations s.com de ail.com s.n	rts and warnings issued by BackupIQ.					Integrate	
$\mathbb{N}$	sc	mentation tool.					Integrate	

8 (Optional) To enable a user to log in with UniView Portal credentials without granting an explicit exception, send the user the log-in link shown here:

UNIVIEW Dashboard Protect Jobs Organizations	©	?	od tre	16
Require Log In With KaseyaOne				
This option will prevent users from logging in directly and only allow them to authenticate via KaseyaOne. Learn More.				
Require Log In With KaseyaOne				
User Exceptions Users with exceptions can continue to log in using local module authentication				
4 Selected × v				
Use this link to log in without KaseyaOne Unified Login: https://lobackup.net/ls Click to copy link				

## To enable or disable automatic user creation

The KaseyaOne integration has an Automatic User Creation setting that you can enable to automatically create a UniView Portal user for each KaseyaOne user. Once enabled, your users in KaseyaOne who are granted access to the UniView Portal module will automatically have a UniView Portal user created. UniView Portal users are created with the default role you select for the Automatic User Creation setting (described in the procedure below). It is recommended to choose a lower level of access as the default role for security purposes.

Note: Creating additional users could result in additional charges in your KaseyaOne invoice.

Run this procedure to enable or disable automatic user creation:



- **1** Log in to the UniView Portal as a superuser.
- 2 Click 🙆:

	Protect Jobs	Organizations	Click here	-@ 🥭	🦪 🔵 db	hitre <mark>10</mark>
Dashboard			Scope All	~	Organization All	53

- **3** Select the **Integrations** view.
- 4 Locate the KaseyaOne integration and click **Show configuration**:

UNIVI	EVV Dashboard	Protect Jobs Organizations	¢	<b>;</b>	?	🔵 dba 🗾 iti	'e <mark>1(</mark>	
Settings								^
Alerts	Integrations Users	Scopes API Access						l
Ţ	KaseyaOne <sub>Kaseya</sub>	The integration with the KaseyaOne portal is configured. Enable the option to login using the KaseyaOne credentials. It will show "Log login form.	gin with	ı Kasey	aOne Id	button on the		
	onfiguration Click here							

- 5 Under Automatic User Creation, click 🕑 to disable or 🔘 to enable automatic user creation.
- 6 (Optional) Under Default Settings, modify the default role assigned to the newly created users: Monitor, Manage, Admin, or Superuser (see "About UniView Portal user accounts" for details).

UNIVIEW Dashboard Protect Jobs Organizations	ŝ	<b></b> (	🤊 🤇	dt	nitre	к
Settings						
Alerts Integrations Users Scopes API Access						
KaseyaOne KaseyaOne The Integration with the KaseyaOne portal is configured. Enable the option to login using the KaseyaOne credentials. It will show "Lo login form."	ogin witi	h Kaseya	One Id" bi	utton on the	Ŵ	
✓ Hide configuration						
Unified Login						
Enable Login With KaseyaOne This option will allow your users to Log In with KaseyaOne. Learn More.						
Automatic User Creation						
Once enabled, your users in KaseyaOne who are granted access to UniView will automatically have a UniView user created. This could result control to enable automatic user creation e. It is recommended to choose a lower level of access as the default of Click to enable automatic user creation						1
Enable Automatic User Creation						
Default Settings Choose default settings for new users imported from KaseyaOne Role Click to select a different default user role						
Monitor						



## To reset the KaseyaOne integration

Use this procedure to reset the KaseyaOne integration. This procedure removes the integration and all associated user mappings from UniView, and removes the UniView module from KaseyaOne. (To temporarily disable login via KaseyaOne without removing the user mappings, see "To disable or re-enable Login with KaseyaOne".)

- **1** Log in to the UniView Portal as a superuser.
- 2 Click 🙆:

	Protect Jobs	Organizations	Click here	-@	2	🥭 🔵 qpi	itre	11
Dashboard			Scope	~		Organization All		:3

- **3** Select the **Integrations** view.
- 4 Locate the KaseyaOne integration and click 🔟.
- 5 (Optional) In the Reset KaseyaOne Integration dialog, click **Copy list to clipboard** to copy and save a list of the integration's users. (You may need to refer to this list as the reset removes these users.)
- 6 Click **Reset** to confirm that this will remove the integration and all of its user mappings.

L	JNIVIE	∃\\ Dashbo	ard Protect Jobs O	rganizations	¢		?	🔵 dt	itre	16
1	Settings									
	Alerts	Integrations Use	rs Scopes API A	Access						
	Ţ	KaseyaOne <sub>Kaseya</sub>	The integration with the K on the login form.	KaseyaOne portal is configured. Enable the option to login using the KaseyaOne credentials. It wi	l show "Lo	ogin with	Kaseya	3One Id" button		
	> Show c	onfiguration		Reset KaseyaOne Integration ×				1		
	VSA	VSA Kaseya	Kaseya VSA integration to setup conditional al The portal is integ 2	Are you sure you want to reset KaseyaOne Integration? All user credentials associated with this integration will be deleted. Copy list to clipboard Sia ti@kaseya.com	guration	Down	load M	anifest E	nabled	
	> Show c	onfiguration								
	BMS	BMS Kaseya	Create tickets in Kasey					Int	tegrate	
		IT Glue <sub>Kaseya</sub>	Synchronize data with	Cancel Reset	3			Int	tegrate	



UNIVI	EVV 🛛	ashboard	Protect Job	s Organizations	6	3 💄 🤅	db tre 14
Settings							
Alerts	Integrations	Users	Scopes	API Access			
Ţ	KaseyaOne <sub>Kaseya</sub>		Configure the inte	gration with KaseyaOne portal to enable the option to login using KaseyaOne credentials.	Integra	tion is rese	Integrate

## Working with Cooper Insights in KaseyaOne

The Cooper Intelligence Engine provides insights based on telemetry gathered from your module usage. These insights are designed to help you get the most out of your Kaseya modules. Insights let you know about features that drive the most value for your business and guide you toward following industry leading best practices.

Once you have integrated KaseyaOne, Unitrends insights are enabled and added to Cooper if trigger conditions are met. See these topics for details:

- "Insight details" for a description of each Unitrends insight
- "To view and manage insights" for steps used to review and resolve insights

For more on KaseyaOne and Cooper Insights, see <u>KaseyaOne</u> and <u>FAQs - Cooper Intelligence Engine</u>.

Haven't used KaseyaOne? It's free! Contact Support to get started.

## Insight details

UniView Portal includes these Unitrends insights:

Component & Insight Name	Summary	Triggers	Excludes
Appliance updates			
You could be missing out on critical updates	Enable Helix auto updates to keep your appliances updated to the latest release.	Send if Helix auto updates have not been enabled on any appliance in the UniView Portal.	<ul> <li>Tenant was added &lt; 7 days ago.</li> <li>A Unitrends appliance with at least one protected asset has not been added to the UniView Portal</li> </ul>
Backup			



Component & Insight Name	Summary	Triggers	Excludes
Automated backup testing	Certify recoverability of your backups by running Unitrends Data Copy Access (DCA) jobs. It's FREE!	Send if there are no scheduled DCA jobs.	<ul> <li>Tenant was added &lt; 7 days ago.</li> </ul>
You haven't set up backup alerting yet	Set a threshold for how long machines can go without a good backup and receive alerts if this threshold is exceeded.	Send if backup alerting has not been set up in the UniView Portal.	<ul> <li>Tenant was added &lt; 7 days ago.</li> </ul>
Backup copy			
You are one incident away from total data loss!	Prevent data loss by setting up a backup copy job on the Unitrends appliance to store copies of your backups off-site.	Send if there are no scheduled backup copy jobs.	<ul> <li>Tenant was added &lt; 7 days ago.</li> <li>A Unitrends appliance with at least one protected asset has not been added to the UniView Portal</li> </ul>
You haven't set up replication alerting yet	Set a threshold for how long machines can go without a good offsite replication and receive alerts if this threshold is exceeded.	Send if replication alerting has not been set up in the UniView Portal.	<ul> <li>Tenant was added &lt; 7 days ago.</li> </ul>
PSA integration			
You're losing time without PSA ticketing integration	Integrate your PSA system (ConnectWise Manage, Autotask, BMS, or Vorex) so that each BackupIQ alert also creates a ticket in the PSA.	Send if no PSA system has been integrated.	<ul> <li>Tenant was added &lt; 7 days ago.</li> </ul>
Your tickets could be going to the wrong inbox	Map your UniView Portal organizations to PSA companies or accounts to ensure tickets are assigned to the correct queue.	Send if no organizations have been mapped to your PSA accounts or companies.	<ul> <li>Tenant was added &lt; 7 days ago.</li> <li>PSA integration was added &lt; 7 days ago.</li> </ul>



Component & Insight Name	Summary	Triggers	Excludes
You could be saving more time with automated ticketing updates!	Use your UniView Portal PSA integration to automatically close tickets.	Send if your PSA integration settings have not been configured to automatically close tickets by status.	<ul> <li>Tenant was added &lt; 7 days ago.</li> <li>No PSA system has been integrated with UniView Portal.</li> </ul>

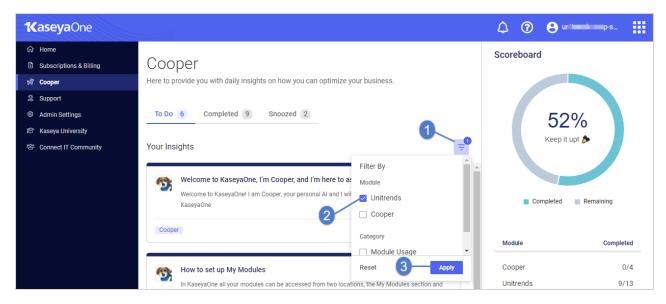
## To view and manage insights

- **1** Log in to KaseyaOne and select **Cooper**.
- 2 Active insights display in the To Do list.

<b>1Kaseya</b> One		🗘 🕜 😬 ur 🐪 s	
유 Home B Subscriptions & Billing	Cooper Here to provide you with daily insights on how you can optimize your business.	Scoreboard	
Cooper Support Admin Settings Kaseya University Connect IT Community	To Do       6       Completed       9       Snoozed       2         Your Insights       2       Active insights display       Image: Complete to KaseyaOne, I'm Cooper, and I'm here to assist you in your onboarding Welcome to KaseyaOne, I'm Cooper, and I'm here to assist you get started with       Image: Complete to KaseyaOne, I'm Cooper, and I'm here to assist you get started with	52% Keep it upl 🌶	
	KaseyaOne  Cooper  Mow to set up My Modules In KaseyaOne all your modules can be accessed from two locations, the My Modules section and the launcher in the top right corner	Cooper Unitrends	0/4 0/13
My Account Team ~	Cooper		
ju te@kaseya.com.ii	Certify recoverability of your Unitrends backups. It's FREE!		
Maria do Director, Account Manager	Unitrends		

3 (Optional) Filter the To Do list to display only Unitrends insights: click =, check the Unitrends Module box, and click Apply.



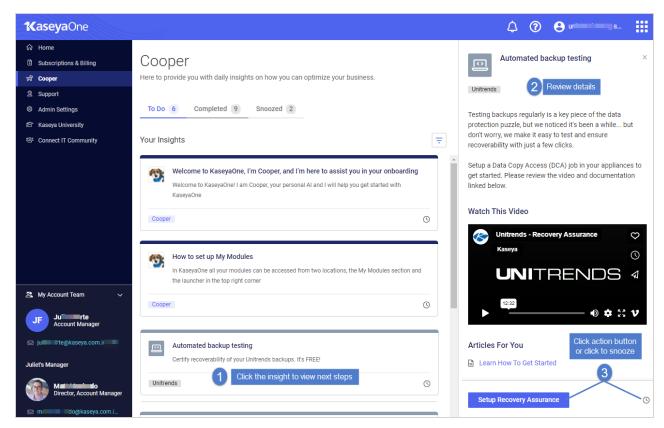


- 4 Click a Unitrends insight.
- 5 Review insight details. Do one of the following:
  - Click the action button to address the insight (Setup Recovery Assurance in our example). For details, see "Resolving insights" below.

OR

• Click () to move the insight to the Snoozed list.





## **Resolving insights**

Find your insight in this table for next steps:

Component	Insight	Steps to resolve
Appliance updates	You could be missing out on critical updates	Enable Helix auto updates for an appliance. See "Modifying Helix Auto Update settings" for details.
Backup	Automated backup testing	Create a DCA job on a Unitrends appliance. See <u>Recovery Assurance</u> in the <u>Administrator Guide for Recovery Series</u> , <u>Recovery MAX</u> , <u>ION/ION+</u> , and <u>Unitrends Backup</u> for details.
Backup	You haven't set up backup alerting yet	Set up conditional alarm thresholds for backups. See "Conditional alarms" for details.



Release 2.50	April	2024
--------------	-------	------

Component	Insight	Steps to resolve		
Backup copy	You are one incident away from total data loss!	<i>Backup copies</i> are duplicates of your backups that are stored off-site. You can copy your backups to the following types of targets: Unitrends Cloud, a secondary Unitrends appliance, cloud storage (managed by Amazon, AWS, Google, or Rackspace), disks, NAS devices, and other media.		
		To resolve this insight, add a backup copy target to a Unitrends appliance and create a backup copy job to copy backups to the target. See these topics in the Administrator Guide for Recovery Series, Recovery MAX, ION/ION+, and Unitrends Backup for details:		
		Backup copy targets		
		<u>Creating backup copy jobs</u>		
Backup copy	You haven't set up replication alerting yet	Set up conditional alarm thresholds for offsite replications. See "Conditional alarms" for details.		
PSA integration	You're losing time without PSA ticketing integration	Integrate your PSA with the UniView Portal to enable BackupIQ to create PSA tickets for your alerts. See the following for details: "Integrating Autotask", "Integrating ConnectWise Manage", or "Integrating Kaseya's Billing Management System (BMS) or Vorex".		
PSA integration	Your tickets could be going to the wrong inbox	Map your PSA's accounts or companies to UniView Portal organizations to ensure tickets are sent to the correct PSA queue. See "Mapping companies and accounts to organizations" for details.		
PSA integration	You could be saving more time with automated ticketing updates!	Edit your PSA's integration settings to automatically close tickets by selecting a status in the Close Ticket Status field. See the following for details: "To view or modify Autotask integration settings", "To view or modify ConnectWise Manage integration settings", or "To view or modify BMS or Vorex integration settings".		

6 When the insight condition is resolved, the insight moves to the Completed list.





## **Integrating Autotask**

Use the procedures below to integrate Autotask PSA with the UniView Portal. Once you have configured the integration, Autotask creates tickets based on alerts and warnings issued by BackupIQ.

- "Step1: Create a UniView Portal API user in Autotask"
- "Step 2: Add the Autotask integration in the UniView Portal"

## Step1: Create a UniView Portal API user in Autotask

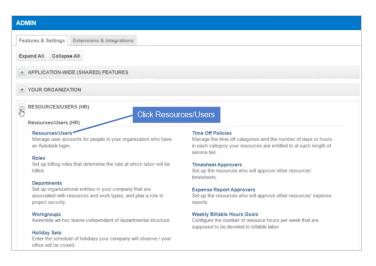
Use this procedure to create an API user that Autotask will use for the UniView Portal integration.

- 1 Log in to Autotask.
- 2 Select  $\equiv > \bigcirc > Admin.$



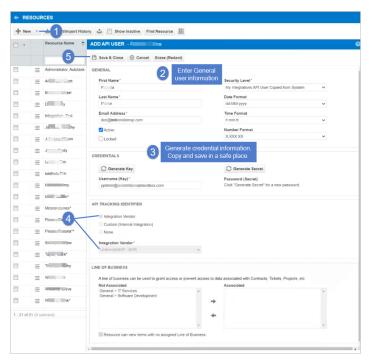
3 Expand Resources/Users (HR) and click Resources/Users.





#### 4 Click New.

- 5 Enter user information.
  - Be sure to select the following in the API Tracker Identifier area: the **Integration Vendor** option and **UnitrendsMSP-BDR** from the Integration Vendor list.
  - Save the username and password of the API user in a safe place. You will need these credentials to complete the integration.
- 6 Click Save & Close.





## Step 2: Add the Autotask integration in the UniView Portal

Use this procedure to add the integration to the UniView Portal.

- **1** Log in to the UniView Portal with a superuser account.
- 2 Click 🙆:

	Protect Jobs Organizations	😥 🜻 🧭 db 💶 unitre 📧
Protect	Click here	+ Add Customer

- **3** Select the **Integrations** view.
- 4 Locate the Autotask integration and click **Integrate**:

UNI	VIEW	Dashboard	Status Jo	bs Organizations	ŝ	<del>9</del>	?	odba 🚛 🖬 re	16
Settir	igs								
Alert	s Integrations	Users	Scopes	API Access					
G	KaseyaOne <sub>Kaseya</sub>		Configure the in	tegration with Kaseya One portal to enable the option to login using KaseyaOne credentials.				Integrate	
~	Autotask Autotask		Create tickets ir	Autotask PSA based on alerts and warnings issued by BackupIQ.	CI	ick her	2	Integrate	

- 5 Enter the **Username** and **Password** of the API user.
- 6 (Recommended) Click Test Credentials to verify that UniView Portal can connect to Autotask.
- 7 Click Next Step.





Release 2.50 | April 2024

Autotask Integration	×
Please fill out your credentials below Username	
PFlue of the second sec	
	® 3
✓ Test Credentials — 2	Cancel Next Step

8 Select an Autotask account from the Account list.

By default, the account you select here is applied to all Autotask organizations. The list contains all Autotask accounts that have been mapped to a UniView Portal organization. If you don't see your account in the list, use the "Mapping companies and accounts to organizations" procedure to add the account to the list. Later in this procedure you can map different accounts to other organizations as needed.

- 9 Select an Autotask ticketing queue from the list.
  - The queue you select is the location where BackupIQ tickets will be created in Autotask.
  - Only one Autotask ticketing queue can be used for BackupIQ tickets.
  - This list contains all Autotask queues assigned to the Unitrends MSP account. (If needed, you can use Autotask to create a new queue to use for BackupIQ tickets.)
  - You can switch to another queue at any time by editing this setting (see "To view or modify Autotask integration settings".)
- 10 (Optional) BackupIQ dismisses offline appliance alerts and conditional alarms automatically when the alert condition has been resolved. You can opt to automatically close corresponding Autotask tickets by selecting a status from the Close Ticket Status list. Or select *Do not close automatically*.
- **11** Select a priority level for alerts. Choose from these levels: Do not sync, High, Medium, Low, or Critical.



Autotask Integration S	Settings	
Account		
Unitrends MSP	Select an account	$\sim$
Queue		
Client Portal	2 Select a ticketing queue	$\sim$
Close Ticket Status		
Complete	(Optional) To automatically close tickets, select a status from the list	$\sim$
Select priority for alerts Alerts High	4 Select priority level for alerts	~

12 (Recommended) Click Create Test Ticket. Go to Autotask to view the test ticket.

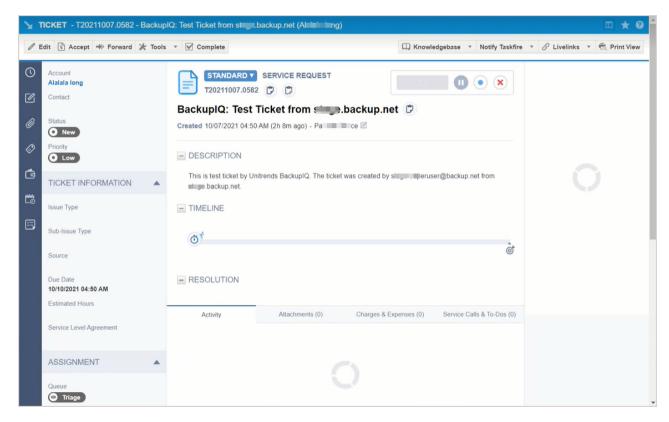


Release 2.50 | April 2024

Account	
Account	
Unitrends MSP	$\sim$
Queue	
Client Portal	$\checkmark$
Close Ticket Status	
Complete	$\sim$
Select priority for alerts Alerts	
High	$\checkmark$
(Recommended) Click to create a test ticket	Cancel Save

Sample test ticket in Autotask:





13 Click Save.



Release 2.50 | April 2024

Autotask Integration Settings	
Account	
Unitrends MSP	$\sim$
Queue	
Client Portal	$\sim$
Close Ticket Status	
Complete	$\checkmark$
Select priority for alerts Alerts High	~
r ngn	
$\bigcirc$ Reset For All Organizations $\checkmark$ Create Test Ticket	Click here Cancel Save

**14** Map organizations to Autotask accounts.

By default, all organizations are mapped to the account you selected above in step 8. If needed, assign organizations to other Autotask accounts as shown here. Once you've completed your account selections, click **Map**:

#### Notes:

If there are no Autotask accounts in the Organization Mapping dialog, or if you do not see all accounts in the drop-down lists:

- **1** Click **Map** to add the integration and exit the dialog.
- 2 Import organizations from Autotask as described in "Importing Accounts or Companies from your PSA".



Search (optional	Q 250 ∨ per page 1 of 2 pages	<
Search for a	n organization Autotask Account	
212 Bronx	ABLE Ma V	
212 Bronx Child	Autotask Acco  Map organiza to Autotask acco	
212 Brooklyn	Autotask Accour 🗸	
78910 Corporation	Upstate Document Providers	
78	ABLE Manufacturing West Coast ↓	
and a second second	Unitrends MSP Northeast	
	212 Bronx 2	

The integration is added.



	≡w	Dashboard	Protect	Jobs	Organizations	¢	<b>9</b>	?	db itre	ĸ
Settings										
Alerts	Integrations	Users	Scopes	A	PI Access					
Ţ	KaseyaOne <sub>Kaseya</sub>		Configure the	e integra	tion with Kaseya One portal to enable the option to login using KaseyaOne credentials.				Integrate	
×	Autotask <sup>Autotask</sup>				task PSA based on alerts and warnings issued by BackupIQ. Autotask is integrated				C 2 & @ 🖻	

3 After you have completed the step above, tickets are added to the Autotask queue as new BackuplQ alerts. To view these tickets, see "Integrating Autotask".

### Working with your Autotask Integration

Once you've integrated Autotask, use these procedures as needed:

- "To view BackupIQ tickets in Autotask"
- "To view or modify one organization's Autotask settings"
- "Working with your Autotask Integration"

**Note:** The procedures below can be run only by users that have the superuser role.

- "To view or modify Autotask integration settings"
- "To set up integrated customer billing for Spanning Microsoft 365 and Spanning Google Workspace"
- "To remove the Autotask integration"

### To view BackupIQ tickets in Autotask

After you have integrated Autotask with the UniView Portal, tickets are automatically created for BackuplQ alerts generated in your UniView Portal environment. Use these steps to view these tickets in Autotask.

- **1** Log in to Autotask.
- 2 Select My > Service Desk > Account Tickets.



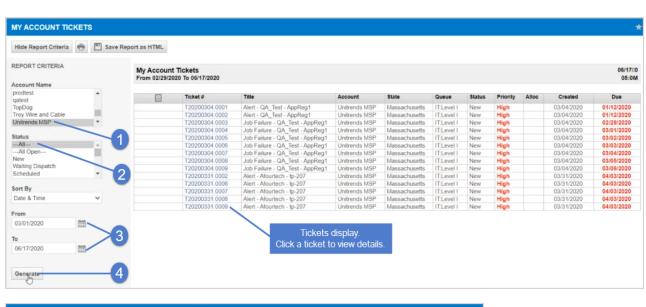
Note: Autotask tickets are created for all BackuplQ alerts unless you selected *Do not sync* in the Autotask Integration Settings Alerts field.

Ay Work Owner Sales Manager	Sales History	MY Service Desk	Waiting My Approval	e Technician	Project Manager - Proj
MY HOURS TODAY	MY HOURS	Tasks & Tickets (5) Workspace & Queues Open Tickets (0) Overdue Tickets (0)	Timesheets (0) Time Off Requests (0) Expense Reports (0)	MY SLA - F	First Response First Response Overdue
Select My > Service Desl Account Tickets	(>	Submitted Tickets (7666) Account Tickets (4332) Closed TDets	Miscellaneous Projects Calendar Form Temolates	0	First Response Due in < 1 hour
Billable		Service Calls (0) CRM Accounts (18) Contacts (26)	Profile Display Preferences	0	First Response Due in 1-2 Hours
MY TASKS ENDING SOON (NEXT	7 DAYS OR OVE	Opportunities (1)		MY OPPOR	TUNITY SUMMARY
4	Status	Overdue Opportunities (1) Quotes (1)		00	
Identify and review proposal, e- quote, SOW Network Refresh Project* Global Marketing Corp.	New	Notes (0) To-Dos (5)		\$0	Already Closed
Process Billing Network Refresh Project <sup>e</sup> Global Marketing Corp.	New	Timesheets Current Timesheet		\$0	Forecasted
Purchase Hardware Network Refresh Project* Global Marketing Corp.	New	Timesheets Time Off Requests (0)		\$0	
1 - 10 of 10 Sho	w All	Time Summary Expense Reports		φυ	Lost

### 3 Enter the following:

- Account Name Select Unitrends MSP.
- Status Select All.
- From and To Select the date range of tickets to view.
- 4 Click **Generate**. Tickets generated in the specified date range display. Click a ticket to view details.





0	idit 🗊 Accept 🚸 Forward 🂥 Tools	s * 🗹 Complete 🕮 Knowledgebase * Notify Task
D	Account Unitrends MSP	STANDARD SERVICE REQUEST
2	Contact	
		Alert - Afourtech - tp-207
2	Status New	Created 03/31/2020 09 55 AM (77d 19h 14m ago) - Pamela Pierce 🖻
9	Priority High	- DESCRIPTION
6		Alert details Created: Tue, 31 Mar 2020 16 54:00 +0000Due: Fri, 03 Apr 2020 16 54:00 +0000Severity: criticalAppliance: tp-207Message: The VM replica tp-Centos-minimal_replica758503 has been invalidated.
1	Issue Type	The replica has entered live mode. Please delete the replica and start over.
	Sub-Issue Type	I TIMELINE
	Sub-Issue Type Source	TIMELINE
		_
	Source Due Date	0 
	Source Due Date 04/03/2020 09:54 AM	0 
	Source Due Date 04/03/2020 09:54 AM Estimated Hours	RESOLUTION
	Source Due Date 04/03/2020 09:54 AM Estimated Hours	RESOLUTION      Activity Charges & Expenses (0) Service Calls & To-Dos (0)

### To view or modify one organization's Autotask settings

By default, the integration's account, queue, close ticket status, and alert priority settings are applied to all organizations. If needed, you can use this procedure to apply different settings to an organization or to re-apply the default settings to an organization whose settings you have modified.

- **1** Log in to the UniView Portal.
- 2 Select Organizations.



- 3 Locate the organization. Click and select Autotask Settings.
- 4 (Optional) Do one of the following:
  - Modify settings and click **Overwrite Settings** to apply your changes.
  - To re-apply the defaults to this organization, click **Use Default Settings**, then click **Overwrite Settings** to apply your changes.

	Protect Jobs Organizations	段 😤 🧑 🔵 db====================================
Organizations	0	₽ Map Organizations + Import
Scope N	ame	
All ~		Q Alerts
Name 🗢	Autotask Integration Settings × e •	
212 Bronx		1
212 Bronx Child	Account	ConnectWise Settings
212 Brooklyn	ABLE Manufacturing HQ* V	Autotask Settings
78910 Corporation	Queue 3 Modify settings Value Strain Value S	Delete
78910	Close Ticket Status	
789	Complete 🗸 👌	1
A name ing		:
ABLE Manufacturing HQ	Select priority for alerts	:
ABLE Manufacturing HQ*	Alerts Critical V	i
ABLE Manufacturing West Coast	4	:
Act	○ Use default settings	:
Acc		: 💽

### To view or modify Autotask integration settings

- **1** Log in to the UniView Portal with a superuser account.
- 2 Click 🙆:

	Protect	Jobs	Organizations	Click here	¢	2	?	ہ db	itre <mark>1¢</mark>
Dashboard				Scope		~	Organiza All	tion ~	£3

- **3** Select the **Integrations** view.
- 4 Locate the Autotask integration and click  $\swarrow$ .



	EW Dasht	board Protect Jobs Organizations	ම 😑 🤅	db itre	к
Settings					
Alerts	Integrations Us	sers Scopes API Access			
G	KaseyaOne <sub>Kaseya</sub>	Configure the integration with Kaseya One portal to enable the option to login using KaseyaOne credentials.		Integrate	
×	Autotask <sup>Autotask</sup>	Create tickets in Autotask PSA based on alerts and warnings issued by BackupiQ. Autotask is integrated Username: P ccom	Click	here	

- 5 (Optional) To view the Password, click the 🗠 icon.
- 6 (Optional) Modify credentials settings. Click **Test Credentials** to verify that UniView Portal can connect to Autotask.
- 7 Click Next Step.

Autotask Integration	×
Please fill out your credentials below Username	
PF1	
•••••	® 3
✓ Test Credentials — 2	Cancel Next Step

- 8 (Optional) Modify integration settings.
- 9 (Optional) Click **Reset For All Organizations** to apply changes to all Autotask organizations.
- 10 Click Save.



Account	
Unitrends MSP	~
Queue (Optional) Modify create tes	r settings and st ticket
Client Portal	$\checkmark$
Close Ticket Status	
Complete	~
Select priority for alerts	
High	~

## To set up integrated customer billing for Spanning Microsoft 365 and Spanning Google Workspace

Use these procedures to set up Autotask integrated customer billing for Spanning Backup for Microsoft 365 and/or Spanning Backup for Google Workspace. These procedures enable the following license information to be posted to Autotask each night: number of Standard Licenses in Use and number of Archived Licenses, by Spanning tenant or domain. This license data is then used by Autotask when generating invoices.

### Prerequisites

Ensure that these prerequisites have been met before running the procedures below:

• UniView Portal has been integrated with KaseyaOne. (To add the integration, see "Integrating KaseyaOne".)

	IEW	Dashboard	Protect	Jobs	Organizations	¢	<b>;</b>	?	odbaarsettigeneritre	
Settings										^
Alerts	Integrations	Users	Scopes	6	API Access					- 1
G	KaseyaOne <sub>Kaseya</sub>		The integra login form.		the KaseyaOne portal is configured. Enable the option to login using the KaseyaOne credentials. It will show " KaseyaOne is integrated	.ogin w	ith Kase	eyaOne I	d" button on the	
> Show	configuration									

UniView Portal has been integrated with Autotask. (To add the integration, see "Integrating Autotask".)



L	JNIVIE	EVV	Dashboard	Protect	Jobs	Organizations		¢	<del>.</del>	?	🔵 db	itre	к
:	Settings												
	Alerts	Integrations	Users	Scopes	A	PI Access							
	×	Autotask <sup>Autotask</sup>				task PSA based on alerts and warnings issued by BackupiQ.	Autotask is integrated				•	Ø 🗊	

- Your Spanning Backup for Microsoft 365 tenants and/or Google Workspace domains have been integrated with the UniView Portal.
  - To integrated a Microsoft 365 tenant, see "Integrating a Microsoft 365 tenant".
  - To integrate a Google Workspace domain, see "Integrating a Google Workspace domain".

Use these procedures to set up integrated customer billing for Spanning Backup Microsoft 365 and Google Workspace domains:

- "Step 1: Set up organization mapping in UniView"
- "Step 2: Verify that corresponding mappings have been created in Autotask"
- "Step 3: Set up service mapping in Autotask"

#### Step 1: Set up organization mapping in UniView

- **1** Log in to the UniView Portal.
- 2 In the Protect > Microsoft 365 or Protect > Google Workspace view, ensure that the Spanning Backup tenants and domains for which you will use integrated customer billing have been mapped to UniView organizations.

Notes: See these procedures to view and modify mappings:

- "To map Microsoft 365 tenants to organizations"
- "To map Google Workspace domains to organizations"

In our example, the Microsoft 365 tenant *Pinkston Farms* has been mapped to the UniView organization 212 *Bronx*, and the Google Workspace domain *Google Test Domain* has been mapped to the UniView *Guest Services* organization:



Protect														+ Add Cus	stomer
<b>ຖ</b> ້ Spanning Licenses 🔅															
Assigned 🚺 2080   1	<b>=</b> 0														
Remaining 🚺 900   1	<b>0</b>														
Purchased 🚺 2980   1	<b>0</b>														
Appliances Assets	Microsoft 365 Goog	le Workspace	Salesforce	Microsoft A	zure										
Domain Name 🕈	Organization 🗢	Licenses	Expiration	Users Coverage	Storage		**	<u>s</u> (	> @	· A	C	Last 30 I	Backups		
s Ehbers	Brakus Group 🗹	🖪 17777 🖒 🗖 –	9/6/25	115%	▲ 88.8 PB ■ 93.1 GB	00	0	0		Ċ	Ċ				ß
Pinkston Farms	212 Bronx 🗹	120 🗭	2/28/29	<mark>58%</mark>	▲ 42.7 MB ■ 9.9 MB	××	× ×	0		0	Ċ				ß
<sup>ua</sup> omain Mappir	None 🖄	13C	7/26/25	10%	❹ 9.3 GB ■ 4.7 GB	<b>S</b> ×	0	⊙ (		0	¢				Z
~~~															
NIVIEW	Dashboard Protect Jobs	Organizations										බු (	6 G	) 🔵 si i i i	

rotect											+	Add Custome
<b>Spanning Licenses</b> (1)												
Assigned 🚺 2080   😇 0												
Remaining 📔 900   🖻 0												
Purchased 🚺 2980   🛅 0												
Appliances Assets	Microsoft 365 Goo	gle Workspace	Salesforce	3								
Domain Name 🗢	Organization a	Licenses	Expiration	Users Coverage	Storage		۵ ،	-	**	C	Last 30 Backups	
Google Test Domain	Guest Services 🕜	🛾 20 🗭	7/26/	10%	<ul><li>▲ 9.3 GB</li><li>● 4.7 GB</li></ul>	0	•	> ×	Ø	0		Ľ

3 On the Organizations page, click **Map Organizations** and ensure that the UniView organizations that were mapped to the Spanning domains in step 2 have also been mapped to Autotask accounts.

#### Notes:

- These conditions must be met to post a Spanning domain's license information to Autotask:
  - The Spanning domain is mapped to a UniView organization (in UniView on the Protect > Microsoft 365 or Google Workspace page).
  - The UniView organization that has been mapped to the Spanning domain is also mapped to an Autotask account in UniView (under Organizations > Map Organizations).
- If you don't see your Autotask accounts, import accounts from Autotask as described in "Importing Accounts or Companies from your PSA".

In our example, the UniView organization 212 Bronx has been mapped to the Autotask Levine School of Music account:



Organizations	Organization Mapp Choose related entity on the	ing right dropdown to create mapping		2 ×	≥ Map Organizations + New
Scope	,				
All	Search	Q	50 v per page 1 of 1 pages	s < >	Q Alerts
Name 🗢	Organization	Autotask Account	BMS Account (1)		
0	212 Bronx	Levine School of Music	✓ unitrends ICB	~	
2					

4 After the Spanning domain and Autotask organization mappings have been added in UniView, corresponding mappings are automatically created in Autotask.

### Step 2: Verify that corresponding mappings have been created in Autotask

- 1 Log in to Autotask.
- 2 Select > Admin > Extensions & Integrations.

Autota	ask Search	Q	Dashboards	Create My	Calendar	Bookmarks
Home 1	ADMIN CATEGORIES		Project Manager - Tas	ks Project Team Memb	er Sales His	tory Sales Manag
CRM	Company Settings & User	's k	÷ N	ly Ticket Summary		My SLA - First F
Contracts	Features & Settings					
Projects	Automation			Total O	pen	0
Service Desk	Activations		C	25		
Timesheets	Extensions & Integrations	;	3			
Inventory	COMMONLY USED		_	Due To	day	0
Reports			0	0 0 25		
Admin	Getting Started					
	R Jurces (Users)	V		O	-	0

3 On the Extensions & Integrations tab, click Kaseya Integrations > Kaseya Module Company Mapping:

266



Autotask	Search	Q	Dashboards	Create	Му	Calendar	Bookmarks
Admin							
Company Settings & Users	Features & Settings	Automation	Activations	Extensions	& Integrati	ons	1
Expand All Collapse All							
✓ Client Portal &	Taskfire						
✓ LiveMobile							
✓ Datto BCDR							
✓ Datto RMM							
<ul> <li>Kaseya Integra</li> </ul>	tions						
KaseyaOne Enable log in with Kaseya	One		IT Glue In Enable int	tegration tegration with IT	r Glue		
Integrated Customer Billing	9					2	
Enable Integrated Custor Choose which modules y Customer Billing.		tegrated	Map your	odule Compan Autotask Comp Integrations.		our Kaseya mo	dules for
Activity Log View a history of transact	tions and failures.						

4 Click **Map by Module Organization** and select the **UniView** module. UniView mappings display. Our mapping was created automatically:

Autotask		Q	Dashboards	Create	My	Calendar	Bookmarks			()	0	Ø
	ask Companies p by Module Organization (190		dule Orga	anizatio 1	ons 🛙							
Specify Company mapping	s for your Kaseya modules. Ch	neck the Ignor	e checkbox for m	odule organia	zations tha	<mark>at you d</mark> o not w	ant to map. The A	utotask Compa	ny and Ignore columns will be disabled if the selected	comp	any has c	ontract s
Save 🛞 Can	cel 🗹 Show Suggested	d Mappings	Show Igr	nored	Only S	how Unmapped	1					
	м	lodule Organiz	tation 🌲			Module Sub-O	rganization 🍵		Autotask Company 🌐		lgi	nore 🌲
Module 🗧 🔰 2 Uniview	M	lodule Organiz	ration 🌲			Module Sub-O	rganization 🍦		Autotask Company 🌐		lgi	nore 🌲
Module 🛊 🔰 2 Uniview	~	lodule Organiz	ration ÷				rganization 👙		Autotask Company 🌐	. 6		nore 🌲
Module 🔶 🔶 2 Uniview Jniview	~	m				Module Sub-O	rganization 🍵				3	
Module 🚖 🛛 💈	Sr Di	m	er	_			rganization 🔶		FONA - Friends of the National Arborat >	6	2	



### Step 3: Set up service mapping in Autotask

- **1** In Autotask, open the company's contract and select **Services**.
- 2 Click **New Service** and add the applicable billing service (*Online Backups* in our example):

🕽 Contract: ne 👘 I - (	Soogle Chrome	Manage Service/Service Bundle - Google Chrome	×		-	
aqanext.autotask.ne	et/contracts/views/contractView.c =:	aqanext.autotask.net/autotask/popups/con	ntract/adjust_service			
Menu	Service Bundles & Services - n nd (Levine School of N	New Service 4	0			* 6
Summary	+ New Service Bundle + New Service Apply Overall Discount	Save & Close 🛞 Cancel		ow Data	for 08/21/2	2023 Q
Internal Costs	Service or Bundle 2 Vendor Period Name Type	Service Name * 3 Select a	a service	guratio Item	on Units	Extended
Services 1	🧷 🗙 🗋 Online Backups 🔪 Monthly	Online Backups	<b>a</b>		0 1	\$0.19
Service Mapping	5 Service is added	Effective Date * (enter a date between 08/20/202	23 - 08/26/2023)	Fetime	ated Monthly	Price: \$1.00
		(and a date bette	20 00/20/2020)			Filee. 91.00
Billing Rules	Note: Extended Price may not equal Units x Unit Price, if there have been ad	08/21/2023			ract period typ	
Billing Rules Exclusions	Note: Extended Price may not equal Units x Unit Price, if there have been a Cost, Unit Price (List), Unit Price, and Extended Price will reflect the period rounding. For additional information, click the Help icon.	08/21/2023			ract period typ u entered, due	
	Cost, Unit Price (List), Unit Price, and Extended Price will reflect the period t	08/21/2023	Amount			
Exclusions	Cost, Unit Price (List), Unit Price, and Extended Price will reflect the period t	08/21/2023	Amount 1			
Exclusions Configuration Items	Cost, Unit Price (List), Unit Price, and Extended Price will reflect the period t		<b>Amount</b> 1 1.0000			
Exclusions Configuration Items Charges	Cost, Unit Price (List), Unit Price, and Extended Price will reflect the period t	Units *	1			
Exclusions Configuration Items Charges Charge Defaults	Cost, Unit Price (List), Unit Price, and Extended Price will reflect the period t	Units * Unit Price	1			
Exclusions Configuration Items Charges Charge Defaults Notes	Cost, Unit Price (List), Unit Price, and Extended Price will reflect the period t	Units * Unit Price Extended Price	1 1.0000 1.00			
Exclusions Configuration Items Charges Charge Defaults Notes Projects	Cost, Unit Price (List), Unit Price, and Extended Price will reflect the period rounding. For additional information, click the Help icon.	Units * Unit Price Extended Price Unit Cost	1 1.0000 1.00 0.4500		u entered, due	

3 Select **Service Mapping** and map the applicable Spanning Microsoft 365 and Google Workspace billing types to the service you added above (*Online Backups* in our example). Click **Save**.

Contract: n nd - G	oogle Chrome				
aqanext.autotask.ne	t/contracts/views/contractView.asp?fi	romWizard	23		
Menu	Integrated Custome	er Billing Service	Mapping - ne	d (Levine	School of Music)
Summary	Specify contract service mappings for	your Kaseya modules and billin	g types.		
Internal Costs 3	Save 🛞 Cancel				
Services					
Service Mapping	1 ^ Uniview (6 Unmapp	ed Billing Types)			
Billing Rules	Module Billing Type Aut	otask Service	Adjustment Frequency	Ignore	
Exclusions Configuration Items	Per Spanning Backup for Google Workspace Archived Licenses	~	Daily (full billing period)	~	<u>^</u>
Charges	Per Spanning Backup for Google Workspace Standard License In Use	nline Backups 🗸	San's (ran sinning period)	~	
Charge Defaults	Is Spanning Backup for		2 Map applicable t	oilling types	
Notes	Google Workspace Enabled	~	Daily (full billing period)	~	
Projects	Per Spanning Backup for Microsoft 365 Archived	~	Daily (full billing period)	v 🗆	*
Tickets					
User-Defined Fields					

The contract is updated:



qanext.autotask.n	et/contracts/view	/s/contractV	/iew.asp	3										
Menu	Service Bun	ndles & Ser	vices - n	d (Levine Scho	ol of Mus	sic) Contra	ct Period:08	3/20/2023	08/26/2023					k (
Summary	New Serv	vice Bundle	New Servic	e Apply Overall Dis	count	0 Units	i i			Show Data	for 0	8/21/	2023	0
Internal Costs		Service or Name		Vendor Perio Name Type		Unit Cost	Unit Price (List)	Discount	Unit Price (1 Peri			its		ende Pric
Services	/×D	Online Back	ups ICB	Mont	hly	\$0.10	\$1.00	77.42%	\$0.	051	0	6		\$0.4
Service Mapping										What is this? Estima	ited M	onthly	Price: S	2.13
Billing Rules Exclusions Configuration Items	Cost, Unit Price	e (List), Unit F additional info	Price, and Extende prmation, click the	d Price will reflect the						What is this? Estima ype differs from the contr an the discount value you	act per	riod ty	pe, the U	
Service Mapping Billing Rules Exclusions Configuration Items Charges Charge Defaults	Cost, Unit Price rounding. For a	e (List), Unit F additional info	Price, and Extende	d Price will reflect the	period type	e with the long		iscount may t	e slightly different t	ype differs from the contr	act per	riod ty ed, du	pe, the U	nit

Integrated customer billing is set up and Autotask will begin receiving updated Spanning license information each night.

### To remove the Autotask integration

Use this procedure to remove the Autotask integration from the UniView Portal.

- **1** Log in to the UniView Portal with a superuser account.
- 2 Click 🙆:

UNIVIEW	Dashboard	Protect	Jobs	Organizations	Click here	¢	2	?	db 👘	nitre 14
Dashboard					Scope		~	Organiza All	ition 🗸	E3

- 3 Select the Integrations view.
- 4 Locate the Autotask integration and click 🔟. Click **Delete**. The integration is removed.

ettings								
Alerts	Integrations	Users	Scopes	API.	Delete Integration	×		
T	KaseyaOne <sub>Kaseya</sub>		Configure the in	tegratior	The Autotask integration settings, including organization mapping, will be lost. Please confirm.		Inte	grate
	Autotask				Cancel D	elete	Click here	



### Integrating ConnectWise Manage

Use these procedures to integrate ConnectWise Manage PSA with the UniView Portal. Once you have configured the integration, ConnectWise Manage creates tickets based on alerts and warnings issued by BackuplQ.

- "Step 1: Add a security role to ConnectWise"
- "Step 2: Add the ConnectWise Manage integration"

### Step 1: Add a security role to ConnectWise

Use this procedure to create a new security role to be used for obtaining the REST API credentials needed for integration with the UniView Portal.

- **1** Log in to ConnectWise Manage with an administrator account.
- 2 Navigate to System > Security Roles.
- **3** Click the plus icon (+) at the top of the screen.



+ New ~		📰 Calendar	💬 Chat with Support
🚓 Manage 🛛 <	Security Roles Security Roles		<b>v</b>
🛠 My Favorites	Role:	~	
Companies	+ 🖶 Actions 🗸	SEARCH CLEAR	••• 😥 < 1-8 of 8 >
Sales Click here	Name ^	Last Update	Updated By
Marketing		All V	
Warketing	Admin	3/23/01	Conversion
₽ Procurement	Engineer	8/20/02	zadmin
E Project	Executive	8/21/02	zadmin
2	Manager	8/20/02	zadmin
မြှေ Service Desk	Sales Subcontractor	12/11/03 12/3/19	zAdmin Admin2
o Time & Expense	Subcontractor	12/3/19	Auminz
±∓ Finance			
😥 System			
Setup Tables			
My Company			
Security Roles			

4 In the Role ID field, enter a name for your new security role (e.g., *UniView Portal API Integration*). Click the **Save** icon.



+ New ~	Recent V Support Calendar Support
🛟 Manage 🛛 <	New Role New Role
🛠 My Favorites	Role: 🔽
E Companies	< + ■ ■ む 🖻
👸 Sales	New Role 2 1 Enter a name
Marketing	

- 5 On the Security Modules screen, click the down arrows beside the Companies, Service Desk, and System headings to expand each section.
- 6 In all three sections, replicate the permission parameters exactly as shown in the tables below. To do so, click the down arrows to change the permissions from None (default) to All. The tables below only show the rows that require editing.

Companies	Add Level	Edit Level	Delete Level	Inquire Level
Company Maintenance	None	None	None	All
Company / Contact Group Maintenance	None	None	None	All

Service Desk	Add Level	Edit Level	Delete Level	Inquire Level
Close Service Tickets	All	All	None	All
Merge Tickets	All	All	None	All
Service Tickets - Dependencies	All	All	None	All
Service Tickets	All	All	None	All
Service Tickets - Finance	All	All	None	All

System	Add Level	Edit Level	Delete Level	Inquire Level
Table Setup	None	None	None	All

7 Click the Save and Close icon.



+ New ~	Recent      Calendar      戸 Chat with Support     へ
🛟 Manage 🤇 🔇	Security Modules Security Modules for Role - API Integration
🛠 My Favorites	Role: API Integration
Companies	< + 国 臣
🔐 Sales	Click here Add Level Edit Level Delete Level Inquire Level
	✓ Companies
Marketing	V Finance
🖵 Procurement	✓ Marketing
Procurement	✓ Procurement
E Project	✓ Project
<b>^</b>	∨ Sales
Service Desk	V Service Desk
🖉 Time & Expense	∨ System
Time & Expense	V Time & Expense
<b>±</b> ∓ Finance	

8 Navigate to System > Members > API Members tab. Click the plus icon (+).

+ New ~	Recent	🗸 🛅 Calenda	ar 🖵 Chatw	vith Support							
🛟 Manage <	Members - API M New Member	embers									
🛠 My Favorites	Regular St	reamlineIT Sub	contractors A	PI Members	ø						
Companies	+ SEARCH	CLEAR	_			Export	View	(No View)	$\sim$	0	¢
Sales Click here	Member ID	Member Name	Location	Role ID		Inactive					
Marketing				~	All		$\sim$				
	Member1	Happy Frog	Tampa Office	Admin							
🐺 Procurement	Member2	Kraken Techs	Tampa Office	Admin							
E Project	Member3	Able Experts	Clearwater Office	Admin							
	Member4	BrightGauge	Clearwater Office	Admin		$\checkmark$					
G Service Desk	labtech	LabTech Software	Clearwater Office			$\checkmark$					
🖉 Time & Expense	guosal	Quosal API	Clearwater Office			$\checkmark$					
O≣ Time & Expense	screenconnect	ScreenConnect API	Clearwater Office			$\checkmark$					
<b>±</b> ∓ Finance											
<b>හි</b> System											
Setup Tables											
My Company											
Security Roles											
Members											
Mass Maintenance											



- 9 On the next Details screen, complete the following fields in each section:
  - Profile section
    - Member ID Enter the username of the member (e.g., Uni Portal). The maximum number of characters allowed is 15.
    - Time Zone Select a time zone for the internal company.
    - Member Name Enter the member's first and last name.
  - System section
    - Role ID The security Role ID controls the level of access to the ConnectWise Manage application by limiting access to functionality. Select the new security role that you created in step 4 (e.g., UniView Portal API Integration).
    - Location Select the default location for the company. Any new record created by the member will
      default to the location set here.
    - Level Select the level of access that the member will have in the application. The member will be able to search for companies at the specified level and the ones below it. The restriction here applies to tickets for companies outside the location, as well as members.

**IMPORTANT!** We strongly recommend that you select the highest level of access (e.g., *Level 1*) to ensure that all companies will sync to the UniView Portal without issue. Selecting a lower level of access may result in some companies not syncing to the UniView Portal.

- Business Unit Select the member's business unit.
- Name This field corresponds to the Level field above. After selecting a Level, select a specific name associated with the structure level.
- Default Territory Select the member's default territory.

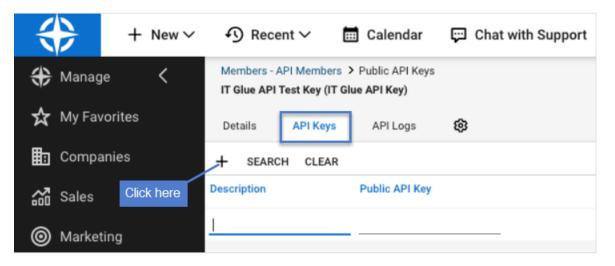
Members - API Members > Detail New Member	
< 十 🖺 🗈 🔁 🖺 HISTORY ~	
Profile	
Member ID*	Time Zone*
Member Name*	Email
Sustam	
System	Leastingt
Role ID*	Location*
Level*	Business Unit*
Name*	Default Territory*
~	<b></b>

**10** In the top menu bar, click the **Save** icon.

$\Rightarrow$	+ New $\sim$	ſ	🕅 Recent 🗸 🛛 🖬 Calendar 🖙 Chat v				💬 Chat with	Support	
🛞 Manag	le <		nbers - AP Member	l Memb	ers > D	etail			
🛠 My Fav	vorites	<	+	Ð	F	Ð	D	HISTORY ~	, Ū
🗄 Compa	anies				Click	here			

**11** Click the **API Keys** tab and then on the plus icon (+).





**12** Enter a description of the key (e.g., *UniView Portal*) and click the **Save** icon.

	+	- New∨	ŋ	) Rec	ent ∽		Calendar	ç	Chat with Support
<del>()</del>	Manage	<			API Member Test Key (IT		Public API Keys	> API	Keys
☆	My Favorites	;	Det	ails	API Keys		API Logs	¢	
₿	Companies		<	+	<b>e e</b>	Ð	History 🗸	Î	
	Sales			ic API I ription:		)			1 Enter a description
0	Marketing		Publi	ic Key: te Key:		•			
Ä	Procurement	t	Note	: The pr	ivate key is o	nly a	vailable at the tir	ne the	e key is created. Please make a note of it.

The public and private keys are generated. Note the Public and Private Keys. You will enter these in the "Step 2: Add the ConnectWise Manage integration" procedure.

**IMPORTANT!** Keep the private key in a secure location. The key will not be visible again after closing the window.





### Step 2: Add the ConnectWise Manage integration

- **Note:** During this procedure you will select a company, service board, and priority level for alerts. These selections are applied to all ConnectWise organizations by default. If needed, you can modify these settings. (For details, see "Integrating ConnectWise Manage" for details.)
- **1** Log in to the UniView Portal with a superuser account.
- 2 Click 🙆:

	ashboard F	Protect	Jobs	Organizations	Click here	ڻ ھ	2	?	db 👘	hitre <mark>14</mark>
Dashboard					Al		~	Organiza All	ation	[]

- 3 Select the Integrations view.
- 4 Locate the ConnectWise Manage integration and click Integrate:

JNIVI	EVV Dashboard	Protect Jobs Organizations	3 😌	() 🌔 😨	iba 📕 🔭 tre	ĸ
Settings						
Alerts	Integrations Users	Scopes API Access				
ſ	KaseyaOne <sub>Kaseya</sub>	Configure the integration with Kaseya One portal to enable the option to login using KaseyaOne credentials.			Integrate	
VSA	VSA Kaseya	Kaseya VSA integration is complete. You can now view your Kaseya agents under Appliances > VSA. Click on Show Configuration to setup conditional alerts synchronization. The portal is integrated with https://G-vsa.(kaseya.net		vnload Manifest	Enabled	
		✓ SHOW CONFIGURATION				
	Manage ConnectWise	Create tickets in ConnectWise Manage based on alerts and messages issued by BackupiQ.	Clic	k here	- Integrate	

5 Enter the ConnectWise Instance URL and Company ID. Enter the Public Key and Private Key that you generated in the "Step 1: Add a security role to ConnectWise" procedure above.



6 (Recommended) Click Test Credentials to verify that UniView Portal can connect to ConnectWise Manage.

### 7 Click Next Step.

	Protect Jobs Organizations	😥 🜻 🧑 🕒 dbe 💶 tre 🖪
Settings	ConnectWise Credentials	
Alerts Integrations Users	Instance URL https://staging.connectwisedev.com/	
KaseyaOne Kaseya	Company ID itglue_f T Enter credentials	Integrate
	Public Key	
VSA VSA Kaseya	Private Key	w Configuration to Download Manifest Enabled
	Test Credentials 2 (Recommended) Recommended Recommended	
ConnectWise O Test C	edentials success	Integrate

- 8 Select a company and service board.
  - The service board you select is the location where BackupIQ tickets will be created in ConnectWise Manage.
  - The drop-down lists contain all companies and service boards assigned to the UniView Portal account. (If needed, you can use ConnectWise Manage to add a new company and service board to use for BackupIQ tickets.)
  - You can switch to another service board or company at any time by editing these settings (see "Integrating ConnectWise Manage".)
- 9 (Optional) BackupIQ dismisses offline appliance alerts and conditional alarms automatically when the alert condition has been resolved. You can opt to automatically close corresponding ConnectWise tickets by selecting a status from the Close Ticket Status list. Or select *Do not close automatically*.
- **10** Select a priority level for alerts. Choose from these levels:
  - Do not sync No ticket is created in ConnectWise Manage
  - Priority 1 Emergency Response
  - Priority 2 Quick Response
  - Priority 3 Normal Response
  - Priority 4 Scheduled Maintenance



ConnectWise Integration Settings	×
Company	
Your Company	$\sim$
Service Board Select a company & service board	
Professional Services	$\sim$
Close Ticket Status (Optional) To automatically close	
Closed (resolved) — 2 tickets, select a status from the list	$\sim$
Select priority for alerts Alerts Priority 1 - Emergency Response - 3 Select priority level for alerts	~
⑦ Reset For All Organizations   ✓ Create Test Ticket	Save

**11** (Recommended) Click **Create Test Ticket**. Go to ConnectWise Manage to view the test ticket.

ConnectWise Integrati	on Settings	
Company		
Your Company		~
Service Board		
Professional Services		$\sim$
Close Ticket Status		
Closed (resolved)		$\sim$
Select priority for alerts		
Alerts		
Alerts Priority 1 - Emergency Resp	Click to create a to	

Sample test ticket in ConnectWise Manage:



Release 2.50 | April 2024

*	+ New~	④ Recent ~ 🛗 Calendar 📮 Chat with Support			🕮 🗘 🚺 Trainin	
>		arch > Service Ticket				A
*	Service Ticket #9	19937 - BackupiQ: Test Ticket from sbackup.net				
My Favorites	Ticket Tasi	iks 0 Configurations 0 Products 0 Activities 0 Tin	me 0 Expens	es 0 Schedule 0 Attachments 0 Open Tickets 0	Finance Conversions 0 Audit Trail Surveys 0 RMA 0	
Ē	< + 🖿	E → ⊕ ✓ Ď MORE ✓ Links ✓ Share ✓ ③	• • Ľ	History 🗸 📋	@ ¥ 0 <	>
Companies	Summary: *	Backup/Q: Test Ticket from stage backup.net			1	-
<b>6</b>	Age: 1m CONTR	ROL SESSION FOLLOW				
Sales					Leens.	- 10
0	Company: Tho					^
Marketing			Site: Ma		+ SEARCH CLEAR Export View (No View) ⑦ ⑧ < 0.0 of 0 >	
			Address 1: 73 Address 2: Ad	0 Spruce Lane 6# 5101	Configuration Name Configuration Ty Location Business Unit Serial Number Model Number Tag Number Contact Expin	F5
Procurement				s Angeles	· · ·	
			State: CA			- 11
E			Zip: 90	210	No Records Found	
Project			Country:			
ନ୍ତ	Ticket #99937	7			x	
Service Desk	Board: *	CROLBoard V	SLA:	Standard SLA		
0	Status: *		Agreement:			a 11.
Time & Expense	Type:		Predecessor:			
±-	Subtype:		Estimated Start I	late:		
Finance	Ticket Owner:		Due Date: Duration:		+	
		(	Impact/Urgency.	Median	Do not show this again	
			Priority:	Priority 1 - Emergency Response		
			SLA Status:	Respond by Wed 6/9/2021 11:07 am (UTC-07)		
	Initial De	escription				
				Unitrends Portal		
				6/9/2021 7:07 AM		
	This is tes	st ticket by Unitrends BackupIQ. The ticket was created by sid	ki	kaseya.com from : backup.net.		
\$					A	

### 12 Click Save.

ConnectWise Integration Settings		×
Company		
Your Company		$\sim$
Service Board		
Professional Services		$\sim$
Close Ticket Status		
Closed (resolved)		$\sim$
Select priority for alerts		
Alerts		
Priority 1 - Emergency Response		$\sim$
	Click here	
$\bigcirc$ Reset For All Organizations $\checkmark$ Create Test Ticket	Cancel	Save

**13** Map organizations to ConnectWise companies.

By default, all organizations are mapped to the company you selected above in step 8. If needed, assign organizations to other ConnectWise companies as shown here. Once you've completed your company selections, click **Map**:



### Notes:

If there are no ConnectWise companies in the Organization Mapping dialog, or if you do not see all companies in the drop-down lists:

- **1** Click **Map** to add the integration and exit the dialog.
- 2 Import organizations from ConnectWise as described in "Integrating ConnectWise Manage".

Organization Mapping Choose related entity on the right dropdown to crea	te mapping	×
Search Q	250 ✓ per page 1 of 1 pages	s < >
Organization (Optional) Enter text to search for an organization	ConnectWise Company	A
212 Bronx	Black Rooster, Inc.	~
212 Bronx Child	Davis Consulting	$\sim$
Map organizations to companies	Davis Consulting	~
Agnetha Björn Benny Anni	Endsight	$\sim$
AT&T	AT&T	~
Autotask Corporation	ConnectWise Company	~
autotask_test	ConnectWise Company	~
	3	
	Cancel	Мар

The integration is added.

L	<b>JNI</b> VIE	EW	Dashboard	Protect	Jobs	Organizations	¢	<b>;</b>	?	odb itre	ĸ
:	Settings										Î
	Alerts	Integrations	Users	Scopes	A	API Access					.
	Ţ	KaseyaOne <sub>Kaseya</sub>		Configure t	he integr	ation with Kaseya One portal to enable the option to login using KaseyaOne credentials.				integrate	
		Manage ConnectWise			tps://ɛ	InectWise Manage based on alerts and messages issued by BackupiQ.	tegrat	ed		2 ® 🖻	



Note: ConnectWise tickets are created for all BackupIQ alerts unless you selected *Do not sync* in the Connectwise Integration Settings Alerts field.

### Working with your ConnectWise Manage integration

Working with your ConnectWise Manage integration

Once you've integrated ConnectWise Manage, use these procedures as needed:

- "To view or modify one organization's ConnectWise Manage settings"
- "Mapping companies and accounts to organizations"

Note: The procedures below can be run only by users that have the superuser role.

- "To view or modify ConnectWise Manage integration settings"
- "To apply default integration settings to all ConnectWise organizations"
- "To remove the ConnectWise Manage integration"

### To view or modify one organization's ConnectWise Manage settings

By default, the integration's company, service board, close ticket status, and alert priority settings are applied to all ConnectWise Manage organizations. If needed, you can use this procedure to apply different settings to an organization or to re-apply the default settings to an organization whose settings you have modified.

- 1 Log in to the UniView Portal.
- 2 Select Organizations.
- 3 Locate the organization. Click and select ConnectWise Settings.
- 4 (Optional) Do one of the following:
  - Modify settings and click Overwrite Settings to apply your changes.
  - To re-apply the defaults to this organization, click **Use Default Settings**, then click **Overwrite Settings** to apply your changes.



ganizations	U				<i>ដ</i> Map Organizations
соре	Name				
All ~					Q Alerts
Name ≑	ConnectWise Integration Settings 212 Bronx		×	Space ¢	
212 Bronx	Modify settings			%	1
212 Bronx Child	Company OR Click Use Default Settings			%	ConnectWise Settings
212 Brooklyn	Blue Light, Co.	~ (	5	%	Autotask Settings
78910 Corporation	Service Board		•	%	Autotask Settings
78910 Corporation!	Professional Services	~ (	0	%	Delete
78910 Corporation1	Close Ticket Status Do not close automatically	$\sim$ (	5	%	1
A Demo Org				%	:
ABLE Manufacturing HQ	Select priority for alerts			%	:
ABLE Manufacturing HQ*	Alerts Priority 3 - Normal Response	~ (	5	%	÷
ABLE Manufacturing West Coast	riony 3 - Norman Response	~ (		%	:
Account1			_	%	

### To view or modify ConnectWise Manage integration settings

- **1** Log in to the UniView Portal with a superuser account.
- 2 Click 🔯:

	Protect Jobs	Organizations	Click here 💮 🦉	🕐 🔵 db 👘 itre 📧
Dashboard			Scope All	Organization

- **3** Select the **Integrations** view.
- 4 Locate the ConnectWise Manage integration and click 2.
- 5 (Optional) To view the Public and Private keys, click the 🗠 icons.
- 6 (Optional) Modify credentials settings. Click **Test Credentials** to verify that UniView Portal can connect to ConnectWise Manage.
- 7 Click Next Step.



Release 2.50 | April 2024

	EVV	Dashboard	Protect Jobs Organizations		¢	<b>9</b>	🦻 🔵	dba <b>n q. a</b> `tre	ĸ
Settings			ConnectWise Credentials						ŕ
Alerts	Integrations	Users	Instance URL Coptional) Modify settings						-
Ţ	KaseyaOne <sub>Kaseya</sub>		Company ID Itum: f					Integrate	
			Public Key						
VSA	VSA Kaseya		Private Key	w Configurat	ion to	Down	load Manife	st Enabled	
			3 (Recommended) V Test Credentials Cancel Next Step						
≥ ⊘	Test credentials s	uccess	× i// connectw/sectiv.com/v2022_2/				1		

- 8 (Optional) Modify integration settings.
- 9 Click Overwrite Settings.

212 Bronx	
Company (Optional)	
Blue Light, Co.	gs v C
Service Board	
Professional Services	~ (
Close Ticket Status	
Do not close automatically	~ (
Select priority for alerts	
Priority 3 - Normal Response	$\sim$
2 (Recomm	nended)
⑤ Use default settings	Cancel Overwrite Settings

**10** (Optional) Modify mappings and click **Map**.



Organization Mapping Choose related entity on the right dro	opdown to create mapping	×
Search	Q 250 v per page 1 of 1 pages	<
Organization 1 (Optional) E search for an	Enter text to organization	
212 Bronx	Black Rooster, Inc.	$\sim$
212 Bronx Child	Davis Consulting	$\sim$
(Optional) Modify mappings	Davis Consulting	$\checkmark$
Agnetha Björn Benny Anni	Endsight	$\sim$
AT&T	AT&T	$\sim$
Autotask Corporation	ConnectWise Company	$\sim$
autotask_test	ConnectWise Company	$\sim$
	3	
	Cancel	Мар

### To apply default integration settings to all ConnectWise organizations

By default, the integration's company, service board, and alert priority settings are applied to all organizations. If you have applied custom settings to organizations (as described in "To view or modify one organization's ConnectWise Manage settings"), you can use this procedure to re-apply the integration's default settings to all organizations.

- **1** Log in to the UniView Portal with a superuser account.
- 2 Click 🙆:

	Protect	Jobs	Organizations	Click here	-@	<b>!</b>	🤊 🔵	db ji	itre <mark>1</mark>	
Dashboard				Scope	~		Organizati All	ion ~	53	*

3 Select the **Integrations** view.



- 4 Locate the ConnectWise Manage integration and click 4.
- 5 Click Reset for All Organizations.
- 6 Review the list of organizations whose settings will be reset. Click Reset Settings.

Settings		Reset Settings For All Organizations			×	
Alerts Integrations Users Scopes API Access		Are you sure you want to reset settings for all organizations? All inte this action will be reset.	gration settings	s associated	with	
ConnectWise Integration Settings 212 Bronx						Integrate
Company		Big Design Blue Light, Co. Defaults will be applied to these organizations			Ь.	
Blue Light, Co.	~	BlueWeb, Company Davis Consulting				Enabled
Professional Services	$\sim$	Endsight Green Torch. Inc.				
close Ticket Status		Green Vision, Co.				
Do not close automatically	~	High Design, Co.			-	
Select priority for alerts						Integrate
Alerts			3			
Priority 3 - Normal Response	~		Cancel	Reset Set	ttings	
Reset For All Organizations	el Sa	ve				2 🛈

### To remove the ConnectWise Manage integration

Use this procedure to remove the ConnectWise Manage integration from the UniView Portal.

- **1** Log in to the UniView Portal with a superuser account.
- 2 Click 🙆:

	Protect Jobs	Organizations	Click here	ලා 😕	🧭 🔵 db 👘 nit	tre 1K
Dashboard			Scope	~	Organization All ~	£3

- **3** Select the **Integrations** view.
- 4 Locate the ConnectWise Manage integration and click .
- 5 Click **Delete**. The integration and any organization mappings are removed.



JNIVI	ΞW	Dashboard	Protect Jo	bs Organizations		ŵ	<b>9</b>	?	odb itre	. 14
Settings					Delete Integration			×		
Alerts	Integrations	Users	Scopes	API Access	The ConnectWise integration settings, including organization mapping, will be lost.	Please c	onfirm.			
ſŢ	KaseyaOne <sub>Kaseya</sub>		Configure the in	tegration with Kaseya		ancel	De	lete	2 Integrate	
	Manage ConnectWise			// connectw	based on alerts and messages issued by BackupiQ. se ■.com/v2( ■2/				<b>1</b> 2 @ 11	

# Integrating Kaseya's Billing Management System (BMS) or Vorex

Use this procedure to integrate BMS or Vorex with the UniView Portal. Once you have configured the integration, BMS or Vorex creates tickets based on alerts and warnings issued by BackupIQ.

- **1** Log in to the UniView Portal with a superuser account.
- 2 Click your user name and select My Settings:

	Protect	Jobs	Organizations	Click here	-@ 🤊	•	🦻 🔵 db	nitre	۲
Dashboard				Scope All	~		Drganization All ~	. 53	

- 3 Select the Integrations view.
- 4 Locate the BMS or Vorex integration and click Integrate.
- 5 Enter the URL of your BMS or Vorex instance.
- 6 Enter the **Username** and **Password** of a BMS or Vorex Administrator account or the BMS or Vorex API user account.

**IMPORTANT!** If two-factor authentication is enabled in your environment, you must enter the username and password of the BMS or Vorex API user account.

- 7 Enter a company name.
- 8 Click **Test Credentials** to verify the credentials you entered.
- 9 Click Next Step.



L	JNIVI	EW	Dashboard	Protect Job	s Organiz	~ •	- [?	) 🔵 dba 💶 litre	16
						BMS Integration	×		
:	Settings					Please fill out your credentials below			
	Alerts	Integrations	Users	Scopes	API Acces	Instance URL https://r bms, w.kaseya.com/			-
	ſ	KaseyaOne <sub>Kaseya</sub>		Configure the inte	gration with K	Username C PI Enter credential settings		Integrate	
						Password 🛛			
	VSA	VSA Kaseya		Kaseya VSA integ setup conditional The portal is integ	alerts synchro	Company Name unitrends	ac	Manifest Enabled	
						3 (Recommended) V Test Credentials Cancel Next Step			
	BMS	BMS Kaseya	⊘ Test c	credentials success		alerts and warnings issued by BackupIQ.		1 Integrate	

- **10** Configure integration settings by selecting an Account, Location, Queue, Status, Type, and Source.
- **11** (Optional) BackuplQ dismisses offline appliance alerts and conditional alarms automatically when the alert condition has been resolved. You can opt to automatically close corresponding BMS or Vorex tickets by selecting a status from the Close Ticket Status list. Or select *Do not close automatically*.
- **12** Select a priority level for alerts. Choose from these levels:
  - Do not sync No ticket is created in BMS or Vorex
  - High
  - Low
  - Medium
  - Very High
- 13 (Optional) Click Create Test Ticket. View the test ticket in BMS or Vorex under Tickets > Service Desk (see "Sample BMS test ticket:" below).
- 14 Click Save.



# UniView Portal Guide Release 2.50 | April 2024

Account			
212 Bronx			~
Location			
Main	\[		$\sim$
Queue			
Level Four Support			$\sim$
Status			
Assigned			$\sim$
Туре			
Change Request			×1×
Source			
Chat			$\sim$
Close Ticket Status			
Completed			$\sim$
Select priority for alerts			
High			~
	2 (Optional)	l i i i i i i i i i i i i i i i i i i i	

Sample BMS test ticket:



= BMS	Home Service Desk CRM Finance Projects Reports HR Inventory Admin NEWTICKET 🔤 🛽	📌 📀 🔍 v.	tkin 👻 Ҟ
🚯 Service Desk Dashboard	BackuplQ: Test Ticket f × 289-08062021 +		
🛷 My Tickets	00:00:06		
🛷 Tickets	sai-test 00:00:06 V 5 :	Contact	
🛤 Unknown Tickets 🛛 🛛 🛛		Account	sai-test
Assets Management ~	BackuplQ: Test Ticket from 🚛 🖉 backup.net	Location	Main
Knowledgebase	This is test ticket by Unitrends BackupiQ. The ticket was created by <u>oryat</u> or from <u>stageneous</u> to the stageneous stag	Contact	None
Recurring Master Tickets		Phone	None
Service Calls		Phone	
	Activities Expenses & Charges Service Calls & To-Dos Related Items  Affected Hardware	Email	None
	Q Search your activities	Account Type	Client
		≣ Details	
		Status	Assigned +
		Priority	High
		Open Date	08/06/2021 05:04 AM

**15** Map organizations to BMS or Vorex accounts.

By default, all organizations are mapped to the account you selected above in step 10. If needed, assign organizations to other BMS or Vorex accounts as shown here. Once you've completed your account selections, click **Map**:

#### Notes:

If there are no BMS or Vorex accounts in the Organization Mapping dialog, or if you do not see all accounts in the drop-down lists:

- **1** Click **Map** to add the integration and exit the dialog.
- 2 Import organizations from BMS or Vorex as described in "Importing organizations from Autotask, ConnectWise Manage, BMS, or Vorex".



Organization Mapping Choose related entity on the right dropdown to creat	ate mapping	×
Search Q	250 ∨ per page 1 of 1 pages	< >
Organization (optional )Enter text to search for an organization	BMS Account	*
212 Bronx	212 Bronx	~
212 Bronx Child	212 bronx child	~
Map organizations to BMS accounts	BMS Account	$\checkmark$
Agnetha Björn Benny Anni	BMS to VSA	$\sim$
AT&T	Kaseya	~
Autotask Corporation	BMS Account	~
autotask_test	BMS Account	~
	Cancel	<b>↓</b> Map

The integration is added.

UN		/ Dashboard	Protect	Jobs	Organizations	ŝ	<b>9</b>	?	🔵 db	Initre	ĸ
Setti	ings										
Ale	rts Integ	rations Users	Scopes	s A	PLAccess						-
	Kas <sub>Kase</sub>	eyaOne ª	Configure t	he integrat	on with Kaseya One portal to enable the option to login using KaseyaOne credentials.					Integrate	
Vs	VSA Kase		setup cond	itional aler	n is complete. You can now view your Kaseya agents under Appliances > VSA. Click on Show Configuration is synchronization. d with https://iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii	nto	Dowr	nload M	anifest	Enabled	
BM	S BM: Kase			tps://na_b OPI	ya BMS based on alerts and warnings issued by BackupiQ. msproview.kaseya.com/ ends				ł	> & ≞	

3 After you have completed the step above, tickets are added to the BMS or Vorex queue as new BackuplQ alerts are generated.



Note: BMS or Vorex tickets are created for all BackuplQ alerts unless you selected *Do not sync* in the Integration Settings Alerts field.

# Working with your BMS or Vorex integration

Once you've integrated BMS or Vorex, use these procedures as needed:

- "To view or modify one organization's BMS or Vorex integration settings"
- "Mapping companies and accounts to organizations"

**Note:** The procedures below can be run only by users that have the superuser role.

- "To view or modify BMS or Vorex integration settings"
- "Working with your BMS or Vorex integration"
- "To set up integrated customer billing for Spanning Microsoft 365 and Spanning Google Workspace"
- "To remove the BMS or Vorex integration"

#### To view or modify one organization's BMS or Vorex integration settings

By default, the integration's account, location, queue, status, type, source, and alert priority settings are applied to all organizations. If needed, you can use this procedure to apply different settings to an organization or to re-apply the default settings to an organization whose settings you have modified.

- 1 Log in to the UniView Portal.
- 2 Select Organizations.
- 3 Locate the organization. Click and select BMS Settings or Vorex Settings.
- 4 (Optional) Do one of the following:
  - Modify settings and click Overwrite Settings to apply your changes.
  - To re-apply the defaults to this organization, click **Use Default Settings**, then click **Overwrite Settings** to apply your changes.



ganizations	BMS Integration Settings		×		
•	Account				
Scope	212 Bronx	~	0		
All	Location Modify settings				Q Alerts
	Main Click Use Default Settings	$\sim$	0		
Name 🗢	Queue			s 🕆 Free Space 🗢	2
212 Bronx	Use default	~	0	) 100%	
212 Bronx Child	Status			) 100%	BMS Settings
212 Brooklyn	Use default	$\sim$	0	) 100%	BMS Settings
	Туре				Delete
555Skyend Architecture	Service Request	$\sim$	0	) 100%	
78910 Corporation	Source			) 100%	:
78	Use default	$\sim$	0	) 100%	:
78	Close Ticket Status			) 100%	:
A Drg	Do not close automatically	~	0	) 100%	:
ABLE Manufacturing HQ	Select priority for alerts			) 100%	1
ABLE Manufacturing HQ	Alerts			) 100%	1
ABLE Manufacturing We	Use default	$\sim$	0	) 100%	:

## To view or modify BMS or Vorex integration settings

- **1** Log in to the UniView Portal with a superuser account.
- 2 Click 🙆:

	Protect	Jobs	Organizations	Click here	-@ 🤨	?	odb itre	e 1K
Dashboard				Scope	~	Organ All	ization	E3

- **3** Select the **Integrations** view.
- 4 Locate the BMS or Vorex integration and click 2.
- 5 (Optional) To view the Password, click the 🗠 icon.
- 6 (Optional) Modify credentials and URL settings. Click **Test Credentials** to verify that UniView Portal can connect to BMS or Vorex.
- 7 Click Next Step.



	EW	Dashboard	Protect Jobs	Grganizations	100			initre
ettings				BMS Integration	×			
Alerts	Integrations	Users	Scopes					
_				Please fill out your credentials below				
Г	KaseyaOne <sub>Kaseya</sub>		Configure the inte					Integrate
	Kaseya			https://rbms,w.kaseya.com/				
				Username (Optional) Modify				
	VSA		Kaseya VSA integ		o			
<i>ISA</i>	Kaseya		setup conditional The portal is inter	Password		Downloa	ad Manifest	Enabled
				<i></i>				
				Company Name				
				unitrends				
			Create tickets in F	3 (Recommended)				
BMS	BMS		API URL: https://r Username: 0 5/	✓ Test Credentials			1	2 © 🖻
	Kaseya		Company Name:				-	

- 8 (Optional) Modify integration settings.
- 9 (Optional) Click Create Test Ticket. View the test ticket in BMS or Vorex under Tickets > Service Desk.
- **10** (Optional) To apply these settings to all organizations, click **Reset for All Organizations**. Review the list of organizations whose settings will be reset. Click **Reset Settings**.
- 11 Click Save.



212 Bronx ~ 212 Bronx ~ bocation Main ~ Use default ~ Use default ~ (Optional) Modify settings ~	0 0
Main	
ueue Use default  tatus  (Optional) Modify settings	
tatus	Ċ
tatus	¢
1 (Optional) Modify settings	
Use default	
	¢
уре	
Service Request V	¢
ource	
Use default	¢
lose Ticket Status	
Do not close automatically $\checkmark$	¢

# To set up integrated customer billing for Spanning Microsoft 365 and Spanning Google Workspace

Use these procedures to set up integrated customer billing for Spanning Backup for Microsoft 365 and/or Spanning Backup for Google Workspace. These procedures enable you to post the following license information to BMS or Vorex: number of Standard Licenses in Use and number of Archived Licenses, by Spanning tenant or domain. This license data can then be used by BMS or Vorex when generating invoices.

#### Prerequisites

Ensure that these prerequisites have been met before running the procedures below:

UniView Portal has been integrated with KaseyaOne. (To add the integration, see "Integrating KaseyaOne".)

ttings									
Alerts	Integrations	Users	Scopes	API Access					
П	KaseyaOne <sub>Kaseya</sub>		The integration login form.	with the KaseyaOne portal is configured. Enable the option to login using the KaseyaOne credentials. It will shov KaseyaOne is integrated	/ "Login w	ith Kase	yaOne I	d" button on the	Ŵ

 UniView Portal has been integrated with BMS or Vorex. (To add the integration, see "Integrating Kaseya's Billing Management System (BMS) or Vorex".)



ι	JNIVIE	ΞVV	Dashboard	Protect Jo	bs Organizations		¢	9	?	🔵 db	itre	ĸ
:	Settings											
	Alerts	Integrations	Users	Scopes	API Access							
	BMS	BMS Kaseya				BMS is integrated				b	> <b>(3)</b> 🗊	

- Your Spanning Backup for Microsoft 365 tenants and/or Google Workspace domains have been integrated with the UniView Portal.
  - To integrated a Microsoft 365 tenant, see "Integrating a Microsoft 365 tenant".
  - To integrate a Google Workspace domain, see "Integrating a Google Workspace domain".

Use these procedures to set up integrated customer billing for Spanning Backup Microsoft 365 and Google Workspace domains:

- "Step 1: Set up organization mapping in UniView"
- "Step 2: Map the account to the UniView organization in BMS or Vorex"
- "Step 3: Set up services in BMS or Vorex"

#### Step 1: Set up organization mapping in UniView

- **1** Log in to the UniView Portal.
- 2 In the Protect > Microsoft 365 or Protect > Google Workspace view, ensure that the Spanning Backup tenants or domains for which you will use integrated customer billing have been mapped to UniView organizations.

Notes: See these procedures to view and modify mappings:

- "To map Microsoft 365 tenants to organizations"
- "To map Google Workspace domains to organizations"

In our example, the Microsoft 365 tenants *M365 Test Domain* and *M365 Test Domain2* have been mapped to the UniView *Guest Services* organization, and the Google Workspace domain *Google Test Domain* has been mapped to the UniView *Guest Services* organization:



	shboard Protect Jobs C	Organizations									Q	3 1	9 🤅	) 🔵		· · ́ р
rotect															+ Add	d Custom
<b>ຖ</b> ້ Spanning Licenses 🕦																
Assigned 🗄 2080   🖻 0																
Remaining 🗄 900   🖻 0																
Purchased 🚺 2980   🛅 0																
Appliances Assets	Microsoft 365 Google W	orkspace	Salesforce													
Domain Name 🕈	Organization	Licenses	Expiration	Users Coverage	Storage	$\geq$	<b>:</b>	-	Φ	<b>i</b> (	e	Las	30 Back	ups		
M365 Test Domain	Guest Services 🙆		Expiration 7/26/	Users Coverage	Storage 9.3 GB 4.7 GB		■ # × •		۰ ا		-			ups		Ľ
M365 Test Domain	-	120 🗹 T —		_	4 9.3 GB	0		0	0	<b>O</b> ()	¢	1111				_
M365 Test Domain	Guest Services 🕜	Ĭ 20 𝗭 □ −	7/26/	10%	<ul> <li>9.3 GB</li> <li>4.7 GB</li> <li>9.3 GB</li> </ul>	0	× <	0	0	<b>O</b> ()	¢	1111				_
M365 Test Domain Mag M365 Test Domain2	Guest Services 🗭 Guest Services 🗭	Ĭ 20 𝗭 □ −	7/26/	10%	<ul> <li>9.3 GB</li> <li>4.7 GB</li> <li>9.3 GB</li> </ul>	0	× <	0	0	<b>O</b> ()	¢					C
M365 Test Domain M365 Test Domain2	Guest Services 🗭 Guest Services 🗭	i 20 ℃	7/26/	10%	<ul> <li>9.3 GB</li> <li>4.7 GB</li> <li>9.3 GB</li> </ul>	0	× <	0	0	<b>O</b> ()	৩ ৩					ے یہ: انت
Mage M365 Test Domain2	Guest Services 🗭 Guest Services 🗭	i 20 ℃	7/26/	10%	<ul> <li>9.3 GB</li> <li>4.7 GB</li> <li>9.3 GB</li> </ul>	0	× <	0	0	<b>O</b> ()	৩ ৩					C C i i i i i i i i i i i i i i i i i i

	shboard Protect Job	os Organizations								ĝ 🧳	0	o si i i i i i i	<b>-?</b>
												+ Add	Custo
T Spanning Licenses 🛈													
Assigned 🚺 2080   🛅 0													
Remaining 🗄 900   🖻 0													
Purchased 🗵 2980   🛅 0													
Appliances Assets	Microsoft 365 Go	ogle Workspace	Salesforce	•									
oomain Name 🗢	Organization 🗧	Licenses	Expiration	Users Coverage	Storage	۵ ه		**	C	Last 30	) Backup:	5	
Google Test Domain	Guest Services 🕜	┋ 20 🗹	7/26/	10%	<ul> <li>9.3 GB</li> <li>4.7 GB</li> </ul>	0	×	Ø	<u>.</u>				(

3 On the Organizations page, click **Map Organizations** and ensure that the UniView organizations that were mapped to the Spanning tenants or domains in step 2 have also been mapped to BMS or Vorex accounts.

#### Notes:

• These conditions must be met to post a Spanning domain's license information to BMS or Vorex:

The Spanning tenant or domain is mapped to a UniView organization (in UniView on the Protect > Microsoft 365 or Google Workspace page).

- The UniView organization that has been mapped to the Spanning domain is also mapped to a BMS or Vorex account in UniView (under Organizations > Map Organizations).
- If you don't see your accounts, import accounts from BMS or Vorex as described in "Importing Accounts or Companies from your PSA".

In our example, the UniView Guest Services organization has been mapped to the BMS TestOrganization account:



rganizations	Organization Mappi Choose related entity on the	ing eright dropdown to create mapping		2 × Map Organ	nizations + New
Scope					
All	Search	Q	50 v per page 1 of 1 pages	< >	Q Alerts
Name =	Organization	Autotask Account	BMS Account (1)		
01	Guest Services	Autotask Account	✓ TestOrganization ×	~	
21				*	

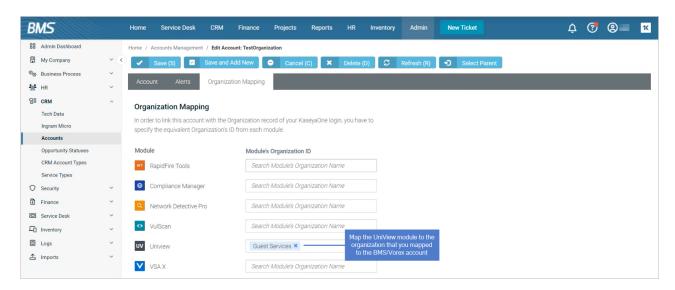
Step 2: Map the account to the UniView organization in BMS or Vorex

- **1** Log in to BMS or Vorex.
- 2 Select Admin > CRM > Accounts.
- 3 Scroll down to the accounts list and select the BMS/Vorex account that you mapped in UniView above (*TestOrganization* in our example).

Admin Dashboard		Account Manager		Business Type		1 Cu	rrency Name			
My Company	~ <									
Business Process	~	Active		Taxable		Int	ernal			
e HR	~		~			~				$\sim$
30 скм — 2	^	Acquired Date		RMM Integration Type		Se	rvice Type			
Tech Data		From	То			~				$\sim$
Ingram Micro										
Accounts		+ New Search Clear	Search Export -				7 Results	System Default	· \$	
Opportunity Statuses										
CRM Account Types		Account Code	Account	Parent Account	Account Type	Account Manage	r Created By	Service Type	Active	
Service Types Security	~	212 B	212 B		Client	ion smith	jon smith		Yes	
									_	
Finance	~	TestOrganization2	TestOrganization2		Client	jon smith	jon smith		Yes	
	~	V3 SALESFORCE B	V3 SALESFORCE B		Client	jon smith	jon smith		Yes	
					Client	jon smith	jon smith		Yes	
D Inventory	~	V2 GOOGLEWORKSPACE B	V2 GOOGLEWORKSPACE	B			Jon on an			
D Inventory	~	V2 GOOGLEWORKSPACE B	V2 GOOGLEWORKSPACE	В					_	
Inventory  Logs		V2 GOOGLEWORKSPACE B V2 M365 B	V2 GOOGLEWORKSPACE v2 M365 B	В	Client	jon smith	jon smith		Yes	
D Inventory	~			В		jon smith jon smith	jon smith jon smith		Yes Yes	

4 On the **Organization Mapping** tab, locate the UniView module and map it to the UniView organization that you mapped to BMS/Vorex above (*Guest Services* in our example):





#### Step 3: Set up services in BMS or Vorex

1 In BMS or Vorex, select Finance > Contracts and select the contract for the BMS/Vorex account (Cont\_2 for the TestOrganization account in our example).

BMS	Home S	Service Desk CRM	Finance Projects	Reports	HR Inve	ntory Admi	in New T	icket		¢ (	🤊 🙁	-	
SB Finance Dashboard	Start Date			End Date				Reference	e Number				
Contracts2 <	From	то	•	From	ŧ	То	ŧ	1					
Co Billing Automation	Status			Contract Number				Billing Cy	cle				
Billing Review			$\sim$									`	~
\$ Billing													
Invoices	+ New	Search Clear Searc	h Export -						7 Results	System Def	ault	* ¢	
B Payments													
Reimbursements	Contract Number	Account	Contract	Contract Type	From	То		Reference Number	Billing Cycle	Contract Price	Default Contract	Status	
Vendor Bills	Cont_7	v2 M365 B	M365 Stage UniView	Recurring	09/07/2023	09/06/2024			Weekly	\$253.00	Yes	Active	
©⊚ Xero ~	cont_/	V2 M303 B	wisos stage oniview	Services	09/07/2023	09/00/2024			Weekiy	\$233.00	168	Active	
©⊚ QuickBooks ∨	Cont_6	212 B	212 B	Recurring Services	09/07/2023	09/07/2023			Contract Length	\$0.00	Yes	New	I.
	Cont_5	TestOrganization	AGG1 mertrics Test_1	Recurring Services	09/06/2023	09/08/2023			Monthly	\$110.00	Yes	New	
	Cont_4	V2 GOOGLEWORKSPACE B	GOOGLEWORKSPACE	Recurring Services	08/25/2023	08/25/2023			Contract Length	\$1,463.00	Yes	New	
	Cont_3	v2 M365 B	365	Recurring Services	08/25/2023	08/25/2023			Contract Length	\$253.00	No	New	
	Cont_2	TestOrganization	Cont_2	Recurring Services	07/16/2023	08/30/202			Contract Length	\$550.00	No	New	

2 Scroll down to Billing Information and click Add.



BMS		Home Service	Desk CRM	Finance	Projects	Reports	HR	Inventory	Admin N	ew Ticket		¢	🤊 🙁	i II
Finance Dashboard														
Contracts	<	Contract Number	r:*			Contract Na	me: Recurri	ng Services 🔭						
©⊚ Billing Automation		Cont_2				Cont_2								
Billing Review	~	Account:*				Start Date:*					End Date:*			
		TestOrganiza	tion		•	07/16/2023				Ē	08/30/202			Ē
\$ Billing		SLA:				Billing Cycle	*				Issue Invoice on:			
Invoices					•	Contract	Length			•	End of Billing Cyc	cle		•
Payments		Reference Numb	er:			Default Cont	tract for Se	rvice Desk:			Billing Periods based	d on Calendar	/ear: 🚯	
Reimbursements						Ves O	No				Ves 🔍 No			
Vendor Bills														
© <sub>☉</sub> Xero	~	Billing Information	Contract	History Exc	clusions	Custom Fields	Atta	chments 🧿	Notifications					
CuickBooks	~													
		Contract Billing P	ice: *											
		\$550.00												
Click he	ere	◆ Add	Delete	l.										
		SERVICE	NAME	DESCRIPTION	EF	FECTIVE DATE	UNITS	DEFAULT UNIT COST	UNIT COST	TOTAL CO	DEFAULT UNIT ST PRICE	UNIT PRICE	TOTAL PRICE	SORT ORDER
		Service	ame	ServicDescr	07	7/16/2023	50	\$11.00	\$11.00	\$550.0	00 \$11.00	\$11.00	\$550.00	1

- **3** Add the applicable billing service:
  - Click Integrated Customer Billing.
  - Select the Uniview Module.
  - Select a Billing Type from the list, then click  $\mathcal{Z}$  to load the latest licensing data.
  - Modify other options as needed, then click **Save**.

In our example, we selected the *Per Spanning Backup for Microsoft 365 Archived License* service. The archived license total for the Spanning Microsoft 365 domains we mapped to the *TestOrganization* is 200.



Add Service				
Automated Billing				
None Device Count RMI	M Agent Count Conta	ct Count	ITG Flexible Assets Inte	grated Customer Billing New
Module Settings				
Module *			Billing Type *	•
Uniview <u>2</u>		$\sim$	Per Spanning Backup fo	or Microsoft 365 Archived License $\checkmark$
Service Info			Billing Info	3 4
Service *			Original Unit Cost	Original Unit Price
ServicName		$\sim$	\$11.00	\$11.00
Service Name *			Unit Cost *	Unit Price *
ServicName			\$11.00	\$11.00
Effective Date *	Sort Order *		Units *	Margin: *
07/16/2023	2	+	200	0.00 % ~
Description *	Number of N	1365	Total Cost	Total Price
ServicDescr	archived lice		\$0.00	\$2,200.00
				5
				Cancel Save

4 Repeat step 3 to add other integrated customer billing services.

Integrated customer billing is set up for the BMS or Vorex account.

IMPORTANT! Spanning license information is updated nightly. To update Spanning license information in BMS or Vorex, you must open the Add Service or Edit Service dialog and click the *C* icon next to the Billing Type field.

## To remove the BMS or Vorex integration

Use this procedure to remove the BMS or Vorex integration from the UniView Portal.

- **1** Log in to the UniView Portal with a superuser account.
- 2 Click 🙆:



	Protect	Jobs	Organizations	Click here	-@ 🌻	🤊 🔵	db itre.	1(
Dashboard				Scope All	~	Organizatio All		C3

- 3 Select the Integrations view.
- 4 Locate the BMS or Vorex integration and click 🔟.
- 5 Click **Delete**. The integration and any organization mappings are removed.

NIVI	EW Das	iboard Protect Jobs Organizations 😥 📒	🥐 🔵 dbre
ettings			
Alerts	Integrations	Isers Scopes API Access	
π	KaseyaOne <sub>Kaseya</sub>	Configure the integration with Kaseya One portal to enable the option to login using KaseyaOne credentials.	Integrate
VSA	VSA Kaseya	Kaseya VSA integration is complete. You can now view your Kaseya agents under Appliances > VSA. Click on Show Configuration to setup conditional alerts synchronization.       Down         The portal i       Delete Integration       X	load Manifest Enabled
		The BMS integration settings, including organization mapping, will be lost. Please confirm.	
BMS	BMS Kaseya	Create ticke API URL: ht Username: Company N	

# Importing Accounts or Companies from your PSA

When the PSA integration was added to UniView Portal, existing companies or accounts were automatically imported. As you add new PSA companies or accounts, you will need to manually import them into UniView Portal. To import new accounts or companies, see "Importing organizations from Autotask, ConnectWise Manage, BMS, or Vorex". To map newly imported companies or accounts to UniView Portal organizations, see "Mapping companies and accounts to organizations".

### Importing organizations from Autotask, ConnectWise Manage, BMS, or Vorex

Once accounts or companies have been added to your PSA, use this procedure to import them into the UniView Portal.

#### To import organizations

**1** On the Organizations page, click **Import**.



UNIVIEW Dashboard Protect Jobs Organizations	😥 🚍 🧭 🔵 dba 🚛 itre 🛛
Organizations Scope Name All	Map Organizations + Import Click here
	Q Alerts
Organizations are imported:	
Import Organizations ×	
Search Q 100 v per page 1 of 2 pages < >	
Help-U-Sell Realty	
Hewitt Associates, Inc.	
Holy Trinity	
□ Hospice Care of South Carolina	
Hunter Engineering	

Cancel

2 Assign organizations to a scope:

Initech 2

Intuit

Kaseya

Initech Inc. Test

K&E Excavating



#### Notes:

- A user's scope determines which organizations are visible in the UniView Portal. To ensure that users can only access information about organizations specified in their scope(s), you must assign each organization to a scope.
- In this procedure, the organizations you select are assigned to one scope. Repeat these steps to assign organizations to another scope.
- Check boxes to select organizations. Click Next Step.

Imp	port Organizations	×
Sea	arch Q 100 v per page 1 of 2 pages <	
	Help-U-Sell Realty	
	Hewitt Associates, Inc.	
	Holy Trinity	
	Hospice Care of South Carolina	
	Hunter Engineering	
~	Initech 2	
~	Initech Inc. Test 1 Check boxes to select organizations	
<b>~</b>	Intuit	
~	K&E Excavating	
	Kaseya	
	Cancel Next Step	)

• Select a scope from the list. Click **Save**.

← Import Organizations	×
Scope * My Scope 1	~
	Cancel Save

3 Map organizations to companies or accounts. Click Map.



	Search	(optional) Enter text to search for an organization	250 ∨ per page 1	of 1 pages 🧹
	Organization	ConnectWise Company	Autotask Account	BMS Account
	Initech 2	Initech 2 V	Autotask Acco 🗸	BMS Account 🗸
Map organizations	Initech Inc. Tool	Initech Inc. Test 🗸	Autotask Acco 🗸	BMS Account 🗸
companies or accounts	Intuit	Intuit ~	Autotask Acco 🗸	BMS Account 🗸
	K&E Excavating	K&E Excavating 🗸	Autotask Acco 🗸	BMS Account 🗸

## Mapping companies and accounts to organizations

By default, the integration's company or account is applied to all of its organizations. Use this procedure to quickly apply different companies or accounts to multiple organizations.

#### To map companies and accounts to organizations

- **1** Log in to the UniView Portal.
- 2 Select Organizations.
- 3 Click Map Organizations.
- 4 (Optional) Filter the organization list by entering a text string in the Search field.
- 5 Select a different company or account for one or more organizations.
  - **Note:** In the figure below, ConnectWise, Autotask, BMS, and Endpoint Backup integrations have been configured for this UniView Portal instance. If you do not see an integration, it has not been added to your UniView Portal instance.
- 6 Click Map.



Dashbox	ard Protect Jobs Organizations				t t t t t t t t t t t t t t t t t t t	
Scope All ~	Organization Mapping Choose related entity on the right dropdov	wn to create mapping			2 ×	Q Alerts
Name 🕈	Search	Q	250	✓ per page 1	of 2 pages <	
212 Bronx	Organization	ConnectWise Company	Autotask Account	BMS Account (1)	Endpoint Backup Organization	:
212 Bronx Child	212 Bronx	× 0 · · · ·		010.0	5 L	1
78910 Corporation	212 Bronx	Your Comp 🗸	212 Bronx × V	212 Bronx 🗸	Endpoint B 🗸	÷
78	212 Bronx 11	ConnectWi 🗸	Group	BMS Accou 🗸	Endpoint B 🗸	÷
78910 Corporation1			Upstate			÷
Arg	78910 Corporation!	ConnectWi 🗸	Document Providers	BMS Accou 🗸	Endpoint B 🗸	÷
ABLE Manufacturing HQ	rganizations 3		ABLE			:
ABLE Manufacturing HQ*	accounts <sup>g</sup>	ConnectWi 🗸	Manufacturing West Coast	BMS Accou 🗸	Endpoint B 🗸	E
ABLE Manufacturing West Coast	Abernathy, Oberbrunner and Renner	ConnectWi 🗸	Unitrends MSP Northeast	BMS Accou 🗸	Endpoint B 🗸	:
			212 Bronx			÷
4	ABLE Manufacturing HQ*	ConnectWi 🗸		BMS Accou 🗸	Endpoint B 🗸	÷
A	ABLE Manufacturing West Coast	ConnectWi 🗸	∆RI F Manu - ∨	RMS Accourt	Fr Ant R 🗸	
3					4	1
A					Cancel Map	

# **Integrating Datto Portal**

Use this procedure to integrate the Datto Portal DBMA backup tool. After the integration is added, Datta Portal data is synchronized with UniView Portal so that you can receive backup alerts and manage issues right from UniView.

Note: Use this procedure to add the Datto Portal integration if you are using the Datto Backup for Microsoft Azure (DBMA) backup product. If you are using Datto SaaS Protection, you must add the UniView integration through the Datto Portal only. For details, see this article: Integrating SaaS Protection with Autotask and BMS.

If you have integrated your PSA system with UniView Portal, backup alerts also generate tickets in your PSA (Autotask, BMS, Vorex, or ConnectWise Manage).

#### To integrate Datto Portal

- 1 In the Datto Portal, select **Admin > Integrations**.
- 2 Click Create API Key.



datto	Status 🗸	Purchasing & Billi	ing 🗸	Admin v 1rketNow	Partner Resources $\checkmark$	Academy	Support 🗸	Community	SharedSE-Dev 🗸	14
Integ	Iratio	ns		Manage Clients Manage Employees						
API Keys	Netw	orking API	ConnectV	Company Settings Portal Email Alerts Nise Autotask						
									Create API Key	
API Ke	y <mark>M</mark> anag	ement								

3 Enter optional information and click **Create**.

С	eate API Key		
,	API Key Details		
	API Key Name		
	Optional		
	Contact Email		
	Optional		
1	Access Controls	settings	
	Select Vendor		~
	Optional		
	Select Client		~
	Optional 🖌	0	
		Cancel	Create

- 4 Locate the newly generated UniView key entry in the API Key Management table. Click its : icon and select View Keys.
- 5 In the Key dialog, copy and save the public and private keys (you will enter these later in this procedure).



API Keys Networking API Con	nnectWise Autotask	Uniview					
						Create	API Key
ADI Kay Managament							
API Key Management							
							Q)
Name 🔨	Contact Email 🗸	Product Family	Vendor 🗸	Client 🗸	Public Key	Last Update 🗸	(Q)
Name ^ UniView	Contact Email ∽ araseya.com	Product Family	Vendor 🗸	Client 🗸	Public Key	Last Update ❤ 2023-05-23 10:31:55	م :1
	araseya.com		Vendor 🗸	Client V			:1 View keys2
UniView	ar aseya.com	BCDR	Vendor 🗸		d9f137	2023-05-23 10:31:55	:
UniView Serg client	araseya.com	BCDR Key Public Key	Vendor ∨	Client ~		2023-05-23 10:31:55 2023-02-22 09:30:26	:1 View keys2 Edit

- 6 Log in to the UniView Portal with a superuser account.
- 7 Click 🙆:

	Protect	Jobs	Organizations	Click here	-@ 🤨	?	db 👘	nitre <mark>14</mark>
Dashboard				Scope All	~	Organ All	nization	63

- 8 Select the Integrations view.
- 9 Locate the Datto Portal integration and click Integrate:

JNIVI	≡w	Dashboard	Protect	Jobs	Organizations	ŝ	<u>3</u>	?	od da an aire	к
Settings		1								-
Alerts	Integrations	Users	Scopes	AF	PLAccess					
ſ	KaseyaOne <sub>Kaseya</sub>		Configure the	integrati	on with KaseyaOne portal to enable the option to login using KaseyaOne credentials.				integrate	
da <u>tto</u>	Datto Portal <sub>Kaseya</sub>		Synchronize o	data with	Datto.			2	Integrate	

- **10** Enter the following:
  - In the Instance URL field, enter https://api.datto.com/.
  - In the Public Key and Private Key fields, enter the public and private keys you saved in step 5.
- **11** (Recommended) Click **Test Credentials** to verify that UniView Portal can connect to Datto Portal.



12 Click Integrate.

UNIVI	EW	Dashboard	Protect Jobs Organizations	¢9	9	odb unitre ҡ
Settings						ĺ
Alerts	Integrations	Users	Datto Portal Integration $\times$			
ſ	KaseyaOne <sub>Kaseya</sub>		Please fill out your credentials below Instance URL https://api.datto.com/			Integrate
VSA	VSA Kaseya		Public Key	in then be	imported	Download Manifest
			Private Key			
BMS	BMS Kaseya		Test Credentials2 (Recommended)			P 🕸 🖻
datto	Datto Porțal <sup>Kaseya</sup>		ntials success X			Integrate

UniView Portal automatically maps all Datto clients to UniView organizations and adds the integration.

UNIV	IEW Dashboard	Protect Jobs Organizations	¢	🔔 🔮	odba <b>nii (11</b> itre <mark>11</mark>
T	KaseyaOne <sub>Kaseya</sub>	Configure the integration with KaseyaOne portal to enable the option to login using KaseyaOne credentials.			Integrate
da <u>tto</u>	Datto Portal <sub>Kaseya</sub>	Synchronize data with Datto. API URL: https://api'ini m/ Datto Portal is integrated Public Key: cc_ica			₽ 🖻
0	The mapping has been succes updated	sfully ×			Q

# Working with your Datto Portal integration

Once you've integrated Datto Portal, use these procedures as needed:

"Mapping Datto Portal clients to organizations"

**Note:** The procedures below can be run only by users that have the superuser role.

- "To view or modify Datto Portal integration settings"
- "To remove the Datto Portal integration"



# Mapping Datto Portal clients to organizations

When the Datto Portal integration was added, UniView Portal automatically created a mapping for each Datto client. As new clients are added to Datto Portal, they are automatically added to UniView and mapped to a UniView organization. If needed, you can use this procedure to quickly modify mappings for multiple organizations.

#### To map Datto clients to organizations

- **1** Log in to the UniView Portal.
- 2 Select Organizations.
- 3 Click Map Organizations.

JNIVIEV	Dashboard Prot	ect Jobs Organizatio	ns ——1	l 🔅 🜻 🧑 🔵 dba <b>nnai a</b> itre ĸ
Organization	IS			2 → Z Map Organizations + New
Scope	Name			
All	~			Q Alerts

- 4 (Optional) Filter the organization list by entering a text string in the Search field.
- 5 In the Datto Portal Client column, select a different client for one or more organizations.

**Note:** If you do not see a Datto Portal Client column, the Datto integration has not been added to your UniView Portal instance. To add this integration, see "Integrating Datto Portal".

6 Click Map.



Organization Mapping Choose related entity on the right dropdown to create mapping		×
Search (Optional) Enter text to search for an organization	50 v per page 1 of 10 pages of	>
Organization	Datto Portal Client	A
212 Bronx	Datto Portal Client 🗸	ו
212 Bronx Child	DCMA Tell t Customer Denis Tell Customer	
212 Brooklyn Map organizations to clients	Denis T Customer 2 Denis T Customer 3	
Skyend Architecture	Denis Tuu. Customer 🗸 🗸	
555tech	Datto Portal Client	
78910 Corporation	Datto Portal Client	
	3	•
	Cancel	ар

To view or modify Datto Portal integration settings

- **1** Log in to the UniView Portal with a superuser account.
- 2 Click 🙆.
- 3 Select the Integrations view.

UNIVI	EW "	Dashboard	Protect Jo	bs Organizations	1	¢	<b>37</b>	?	od da an aire	к
Settings		2								
Alerts	Integrations	Users	Scopes	API Access						
Ţ	KaseyaOne <sub>Kaseya</sub>		Configure the in	tegration with KaseyaOne portal to enable the option to login using KaseyaOne cred	dentials.				Integrate	

- 4 Locate the Datto Portal integration and click  $2^{\circ}$ .
- 5 (Optional) To view the Public and Private keys, click the 🗠 icons.
- 6 (Optional) Modify the Instance URL.
- 7 (Optional) Modify credentials settings. Click **Test Credentials** to verify that UniView Portal can connect to the Datto Portal.



Release 2.50 | April 2024

#### 8 Click Integrate.

VSA	VSA Kaseya	Datto Portal Integration	×	can then be imported	Download Manifest
BMS	BMS Kaseya	Please fill out your credentials below Instance URL https://api.datto.com/			P 🕸 🗎
	IT Glue Kaseya	Public Key	Ø		2 🛍
X	Autotask <sup>Autotask</sup>	Test Credentials — 3 Recommended     Cancel     Cancel	Save you Integrate	ur changes	Integrate
da <u>tto</u>	Datto Portal <sub>Kaseya</sub>	Synchronize data with Datto. API URL: https://www.fice.com/ Public Key: comfra			<b>1</b> —2 🕯

## To remove the Datto Portal integration

Use this procedure to remove the Datto Portal integration from the UniView Portal.

- **1** Log in to the UniView Portal with a superuser account.
- 2 Click 🙆:

	Protect	Jobs	Organizations	Click here	-@ 🐫	?	odb intro	e K
Dashboard				Scope All	~	Organ All	ization ~	C3

- **3** Select the **Integrations** view.
- 4 Locate the Datto Portal integration and click  $\widehat{\square}$ .
- 5 Click **Delete**. The integration and any organization mappings are removed.

	ΞW	Dashboard	Protect Jo	bs Or	ganizations		¢	<mark>.37</mark>	?	🔵 db	itre	ĸ
Settings		•										Â
Alerts	Integrations	Users	Scopes	API A	Delete Integration				×			
G	KaseyaOne <sub>Kaseya</sub>		Configure the int	egration	The Datto Portal integration settings will be lost. Please confirm.	С	3 ancel	De	elete		Integrate	
datto	Datto Portal <sub>Kaseya</sub>		Synchronize dat API URL: https:// Public Key: c	a							2	

# **Integrating IT Glue**

You can now synchronize your assets and appliances with Kaseya's IT Glue documentation platform. This enables IT Glue users to:

- View backup configuration information from the UniView Portal.
- Display backup status, last backup time, and storage for endpoints in IT Glue.
- Ensure organizations and assets from the UniView Portal are automatically mapped to IT Glue organizations and configurations.

### To integrate IT Glue

Use this procedure to integrate IT Glue with the UniView Portal.

- 1 Log in to IT Glue with a Manager or Administrator account.
- 2 On the Account > API Keys tab, generate a custom key for the UniView Portal.



⊠ITGlue	Dashboard	Organizatior	ns Personal	Global	Account		Q	0	?	<b>e</b> 🖦	ĸ
Account	Account										
Settings	Setting	S									
Lusers	5										
Roles	General	Branding	Authenticatio	n IP	Access Cont	trol A	PI Keys	Т	Theme	Vault	
Groups	Warranty Master										
,≭ GlueConnect	The API key you generate here is used to set up a Warranty Master integration. Learn more										
X Workflows	Warranty Mast	er				Gene	rate API K	ley			
MyGlue											
Network Glue	Custom API Key:	ŝ									
Plan	The IT Glue API is	a RESTful API tha	t can be used to ma	anage and re	trieve informat	ion. Learn mo	re				
>_ Activity Logs	utmsp-test	17	G.e391700117	00-1001.70	1unoCuTufdt	p2	Revoke		Pass	sword Access	-
🛓 Import Data					Genera	te a custo	m API k	ev for	r the		+
1 Export Data						UniViev		,			
Runbooks											

- **3** Log in to the UniView Portal as a superuser.
- 4 Click 🙆:

	Protect Jobs	Organizations	Click here	-@ 🤨	🥑 🔵 db	itre K
Dashboard			Scope	~	Organization All	× []

- 5 Select the Integrations view.
- 6 Locate the IT Glue integration and click Integrate.
- 7 Enter the API Key you generated above in step 2.
- 8 Click **Test Credentials** to verify the API key you entered.
- 9 Click Integrate.



ettings				
Alerts	Integrations Users	Scopes API Access		
π	KaseyaOne <sup>Kaseya</sup>	IT Glue Integration	Integr	ate
VSA	VSA Kaseya	Please fill out your credentials below API Key ITG:20f6	w Configuration to Download Manifest Enab	led
		✓ Test Credentials 3 Cancel Integrate		

**10** On the Organizations page, click **Import**:

UNIVIEW Dashboard Protect Jobs	Organizations	😥 📜 🥐 🔵 dba 🚛 itre 🗙
Organizations		# Map Organizations     + Import
Scope Name		Click here

Organizations are imported:



Release 2.50 | April 2024

Import Organizations	×
Search Q 100 v per page	1 of 2 pages < >
Name 1	Í
□ Glue Tips	
Grand Child Organization	
Green Vision Suborg	
helixCustomer	
Help-U-Sell Realty	
Hewitt Associates, Inc.	
Holy Trinity	
Hospice Care of South Carolina	
	Cancel Next Step

#### **11** Assign organizations to a scope:

#### Notes:

- A user's scope determines which organizations are visible in the UniView Portal. To ensure that users can only access information about organizations specified in their scope(s), you must assign each organization to a scope.
- In this procedure, the organizations you select are assigned to one scope. Repeat these steps to assign organizations to another scope.
- Check boxes to select organizations. Click Next Step.



316



lm	port Organizations	×
S	earch Q 100 v per page 1 of 2 pages	$\langle \rangle$
	Name 🛧	*
	Glue Tips	
	Grand Child Organization	
	Green Vision Suborg	
	helixCustomer	
<b>~</b>	Help-U-Sell Realty	
	Hewitt Associates, Inc.	
	Holy Trinity	
<b>~</b>	Hospice Care of South Carolina	
	Cancel Next S	<b>▼</b>

• Select a scope from the list. Click **Save**.

$\leftarrow$ Import Organizations	×
Scope * My Scope 1	~
	Cancel Save
	Calicer Save

 If you have integrated UniView Portal with your PSA (Autotask, ConnectWise Manage, BMS, or Vorex), the Organization Mapping dialog displays. UniView Portal automatically maps PSA accounts/companies to IT Glue organizations based on name. If no suggested match can be found, the organization remains unmapped.

Review the mappings and make changes if needed. Then click  $\ensuremath{\textbf{Map}}$  .



earch	Q 250 v per page 1 of 1 pages	s <	2
Organization	Autotask Account		Ì
Help-U-Sell Realty Review / mapping		•	1
Hewitt Associates, Inc.	Hewitt Associates, Inc.	*	
Holy Trinity	Holy Trinity	•	
Hospice Care of South Carolina	Hospice Care of South Carolina	*	

• Repeat these steps to assign organizations to another scope.

# Working with your IT Glue integration

Use these procedure to view/modify IT Glue credentials or remove the IT Glue integration:

- "To view or modify IT Glue credentials settings"
- "To remove the IT Glue integration"

## To view or modify IT Glue credentials settings

- **1** Log in to the UniView Portal with a superuser account.
- 2 Click 🙆:

	Protect Jobs	Organizations	Click here	2	🧭 🔵 db 👘 nitre ҡ
Dashboard			Scope All	~	Organization

- 3 Select the Integrations view.
- 4 Locate the IT Glue integration and click  $2^{\circ}$ .



JNIVI	EW	Dashboard	Protect Jo	Jobs	Organizatio	ons								¢	<b>9</b>	?	🔵 db	nitre	. 1
Settings																			
Alerts	Integrations	Users	Scopes	AP	PI Access														
Ţ	KaseyaOne <sub>Kaseya</sub>		Configure the in	integratio	on with Kase	ya One porta	tal to enable	the optior	n to login us	sing Kaseya	aOne crede	ntials.						Integrate	
VSA	VSA Kaseya		Kaseya VSA int setup condition The portal is int	onal alerts	s synchroniz	ation.				ler Applianc	ces > VSA.	Click on Sho	w Configura	tion to	Dow	nload M	anifest	Enabled	
							✓ SHOW	CONFIGU	URATION										
	IT Glue <sub>Kaseya</sub>		Synchronize da	data with I	Kaseya IT Gl	ue documer	entation tool								C	lick he	re	2 û	

5 (Optional) Modify the API Key. Click **Test Credentials** to verify that UniView Portal can connect to IT Glue. Click **Integrate**.

IT Glue Integration	×	
Please fill out your credentials below (Optional) Modify t	he API Key	
ITG.20f6	Jjk1/	
Test Credentials (Optional) Click to test credentials	Cancel Integrate	Click to save changes

# To remove the IT Glue integration

Use this procedure to remove the IT Glue integration from the UniView Portal.

- **1** Log in to the UniView Portal with a superuser account.
- 2 Click 🙆:

UNIVIEW	Dashboard	Protect	Jobs	Organizations	Click here	-© (	2	7	db ji	tre 14	
Dashboard					Scope	~		Organizatio All	n V	53	*

- **3** Select the **Integrations** view.
- 4 Locate the IT Glue integration and click 🔟. Click **Delete**. The integration is removed.



Release 2.50 | April 2024

NIVIE	ΞVV	Dashboard	Protect Jo	bs Organizations	Q	3 🤤	?	odb <b>arra</b> nitre
ettings								
Alerts	Integrations	Users	Scopes	API Access				
ſ	KaseyaOne <sub>Kaseya</sub>		Configure the int	egration with Kaseya One portal to enable the option to login using KaseyaOne credentials.				Integrate
				Delete Integration	~			
VSA	VSA Kaseya		Kaseya VSA inte setup condition The portal is int	The IT Glue Integration settings will be lost. Please confirm.	to		vnload N	lanifest Enabled
				Cancel Delete				_
	IT Glue <sub>Kaseya</sub>		Synchronize data	a with Kaseya IT Glue documentation tool.				



# **API Access**

UniView Portal provides public APIs that customers can use to develop their own tools to access their Portal data. Our public API uses the <u>OAuth 2.0 client credentials flow</u>, but we generally support OIDC protocol. Auth-related endpoints can be discovered through *https://login.backup.net/.well-known/openid-configuration*.

To get started, create public API credentials as described below. For an example request, see "Get public API access\_ token example". For a description of each public API, see UniView Portal's Public API.

# To create public API credentials

- 1 In the UniView Portal, click 🙆.
- 2 In the API Access view, click + New.
- 3 Enter a name for the credentials. Click **Save**.

UNI	VIEW	Dashboard Protect	Jobs Organizations		1	¢ 😍 🧭	odba iig i're ҡ
Settin Alerts		Users Scopes	API Access — 2				3 + New
API Ac	ccess Credentials	Client ID	Q Creator	Start	۵	End	t
	Name ‡	Client ID	¢ Creator ≎	Created 🜩		Status ≑	
	SEE	972e10 958a38		als.	×	Enabled	
	PD31	f86d7fl 7b110e	Name *			Enabled	
	c	2be4c3 48c09f		nter a name		Enabled	
	Dc	65ea30 bbc395		Cancel	Save	Enabled	C
		58af3e					·

4 Copy and save the Client ID and Client Secret.

**IMPORTANT!** Be sure to save the Client Secret in a safe place. You will not be able to access the Client Secret after you close this dialog.

5 Click Close.



Name		
Northwest Dev		
Client ID		
98:	6c1cc	0
Client Secret	Copy and Client ID and	
		Ø O
opy Client ID and Secret and S OPY THE CLIENT SECRET NO OPY IT LATER.	store them in a secure place. WW. IT WILL NOT BE SHOWN AGAIN	AND YOU WILL NOT BE ABLE TO

6 Credentials are added to the Public API Credentials page.

UNI	VIEW	Dashboard Protect Jobs	Organizations		ø 😤 🧿	dba ing nitre ҡ
Settin	gs					+ New
Alerts	s Integrations	Users Scopes A	PIAccess			
API Ac	ccess Credentials					
Name		Client ID	Creator	Start	End	<b>#</b>
	Name ÷	Client ID $\Rightarrow$	Creator ≑	Created 🗢	Status ≑	
	Northwest Dev	Credentials are a	dded a0c523544 dbarrett@un	itrends.com 2/6/23 10:46 am	Enabled	
	SI/ PHE	97 <b>97</b> 958a38	ea53 superuser@y	yopmail.com 1/10/23 4:59 am	Enabled	
	PD_ 1 1	f86d <b>7fu070u</b> 7b110e	pd@yopmail	.com 1/3/23 1:37 am	Enabled	
	999	2be4c31 48c09f	0ee superuser@y	yopmail.com 11/1/22 7:10 am	Enabled	C
		65ea309a777	44d0696b734312	10/13/22		



# Get public API access\_token example

Send the following request to get the public API access\_token, where <token> is Base64 of your UniView Portal client\_ id:client\_secret string:

```
POST https://login.backup.net/connect/token
Content-Type: application/x-www-form-urlencoded
Authorization: Basic <token>
Accept: */*
Cache-Control: no-cache
Host: login.backup.net
Accept-Encoding: gzip, deflate, br
Connection: keep-alive
Content-Length: 36
grant_type: client_credentials
```

