

SOS Online Backup & Recovery Manager (OBRM)

Online Backup & Recovery Manager is a tool for configuring automatic file and folder backups for storage in the SOS cloud. After choosing files and folders for backup, you configure a backup schedule. You can set the backup to run hourly, daily (our recommendation), weekly, or monthly.

- **Continuous Incremental Backups** - Initially, the backup will copy each and every one of the files and folders you specify. After that, any subsequent backups will only backup items that have been changed since the last backup. This is what we call *continuous incremental backup*.
- **On-the-Spot backups** - You can perform immediate, on-the-spot backups, which might be important—especially after making valuable changes to some of your files. And, at any time, you can restore your files and folders-either by choosing individuals file or an entire backup set. Learn more in the sections below.

Table of Contents

Installing SOS OBRM.....	2
Using SOS OBRM	5
Setting up your first Backup.....	6
Restoring Files.....	9
My Account and the Web Portal.....	12
Advanced Tab.....	13
Using your Company Dashboard.....	18

Installing SOS OBRM

Follow these steps to install **SOS OBRM for both PC/Server and Mac OS X**. There are three different options including a direct download link, admin access to the company dashboard, a limited dashboard view for backup accounts, and an .MSI option for deployment to many devices.

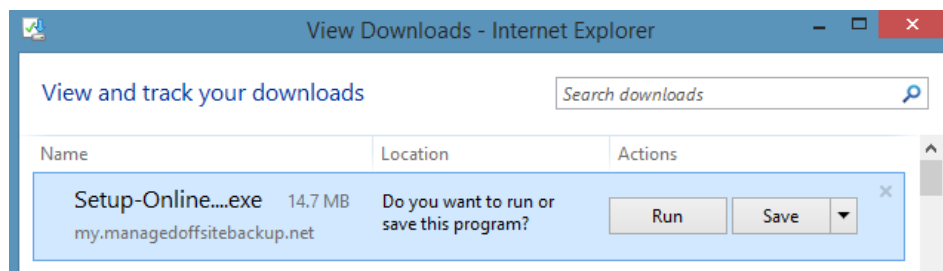
SOS OBRM can be used on any Windows OS PC or Server including:

Option 1 – Direct Version Download

If you have a PC/Server and do not want to log into your dashboard click on the following link to automatically download the most recent version.

<http://my.managedoffsitebackup.net/downloads/Setup-OnlineBackupAndRecovery.exe>

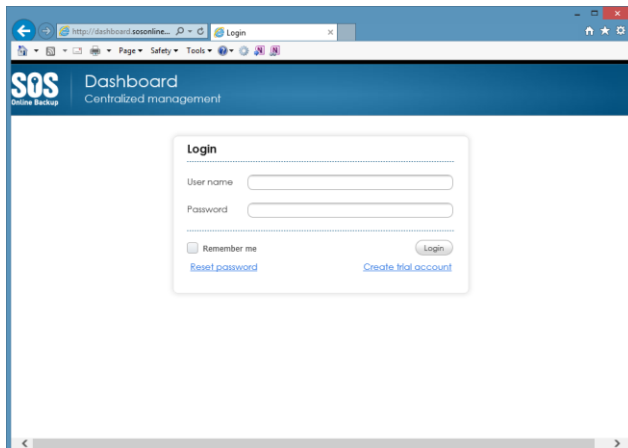
Select > **Run**



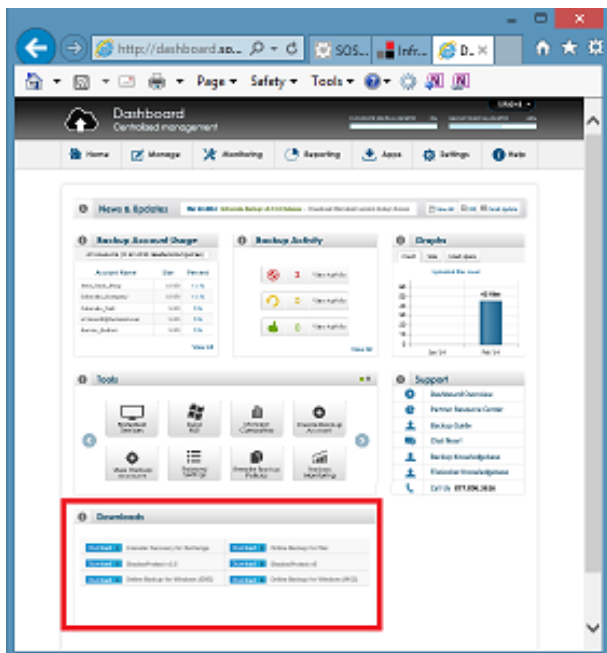
Option 2 – For Company Admin

Use the following link to access your company account dashboard

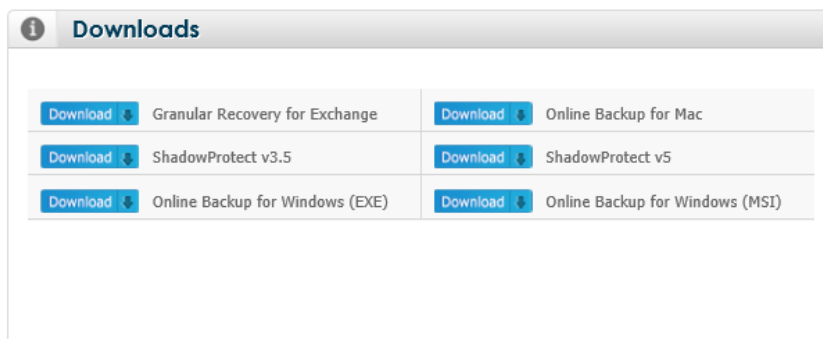
<http://dashboard.sosonlinebackup.com/>



Navigate to the lower left hand portion of the dashboard home page to the download section and select either PC/Windows Server or MAC OS X.



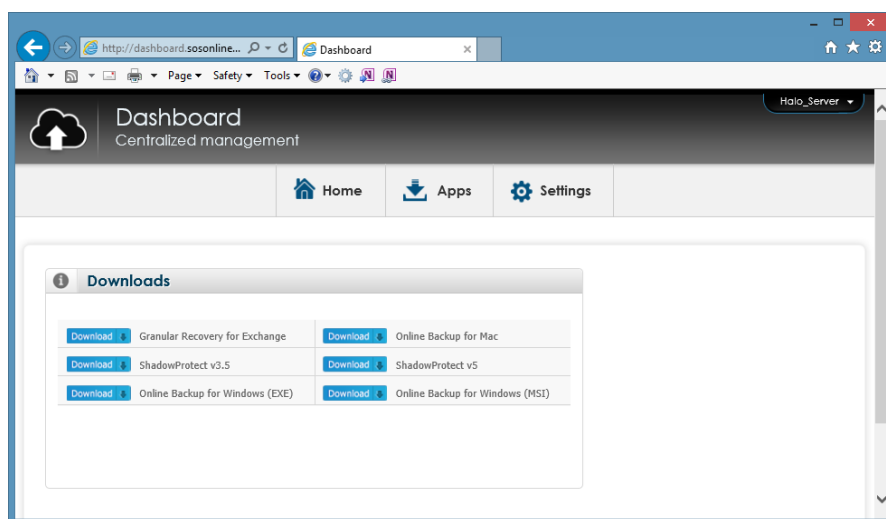
Select > Download for Online Backup for Windows (EXE) or Online Backup for Mac.



Option 3 – For Backup Account Users

When setting up backup accounts under a company shell the following link will take the user to a limited dashboard view where they can download the SOS OBRM.

<http://dashboard.sosonlinebackup.com/>



Additional information can be found via the following:

<https://support.infrascale.com/entries/21837766-SOS-Installation-and-User-Guide>

<https://support.infrascale.com/entries/24329711-Native-SQL-Backup-v5-8-0-4379->

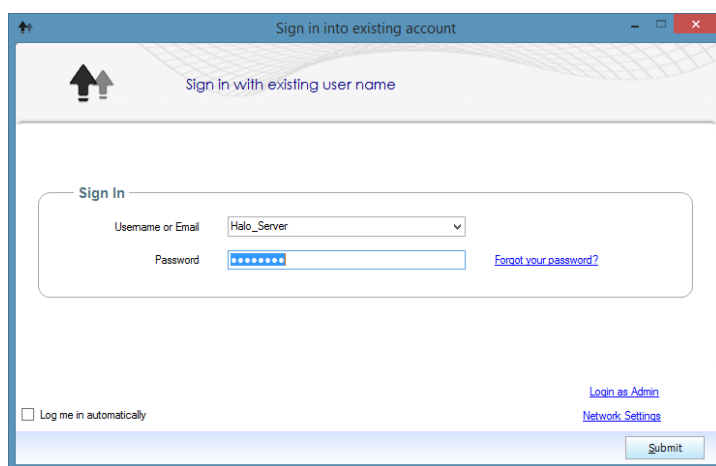
<https://support.infrascale.com/entries/25079468-PC-Client-v5-9-0-7-31-2013-MS-SQL-backup>

Overhead Space

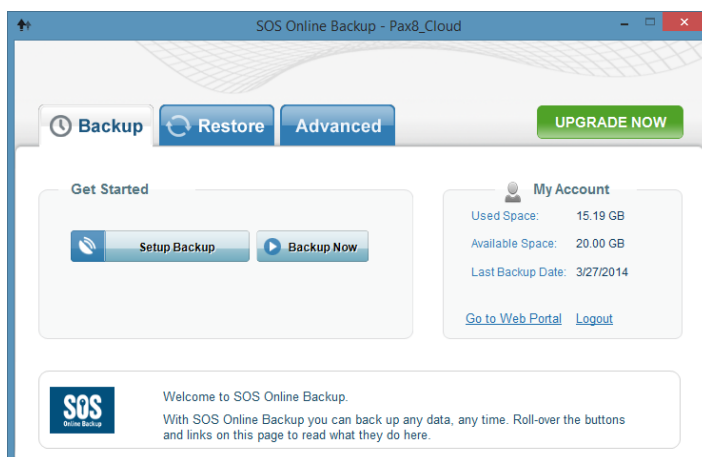
SOS requires over head space for the backup set, because SOS using a caching system which will create a local copy of the files in the backup set for incremental backups. SOS requires at least 75-80% of the backup set as space on the hard drive for caching. Say, you have 10 GB, you will need around 8 GB of space. If you do not have enough space on your C drive, you can redirect the cache to another drive that has more space. You have an option in the program to do it. Go to “Advanced” > Options > Folders.

Using SOS OBRM

After installing the SOS OBRM the application will launch and you'll be presented with a login window.



Enter your **SOS Username** and **Password** and click the **Submit** button. After a few moments, the main window will appear, confirming that your installation is complete.



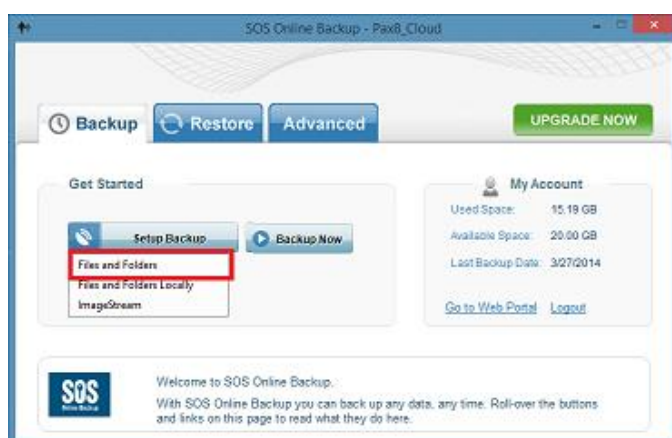
The Online Backup & Recovery Manager Main Window

Take a moment to survey all of the elements in this window:

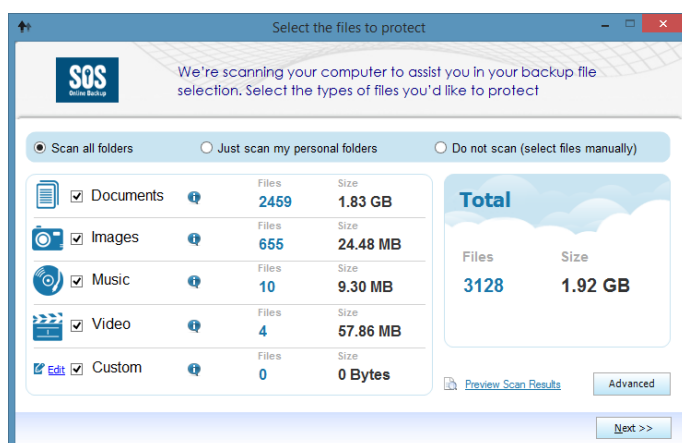
- The **Backup**, **Restore** and **Support** tabs
- The **Menu** in the upper left corner
- The contents of the **Backup** tab are visible when the window first appears
- In the **Backup** tab, you'll see the **Setup Online Backup** and **Backup Now** buttons
- Also, take note of the **My Account** section-which includes a link to the Web Portal

Setting up Your First Backup

Setting up an online backup with **SOS Online Backup & Recovery Manager** is quite simple: you choose files and folders, decide upon a schedule, and optionally choose to receive email reports. Follow these steps to configure an online backup:

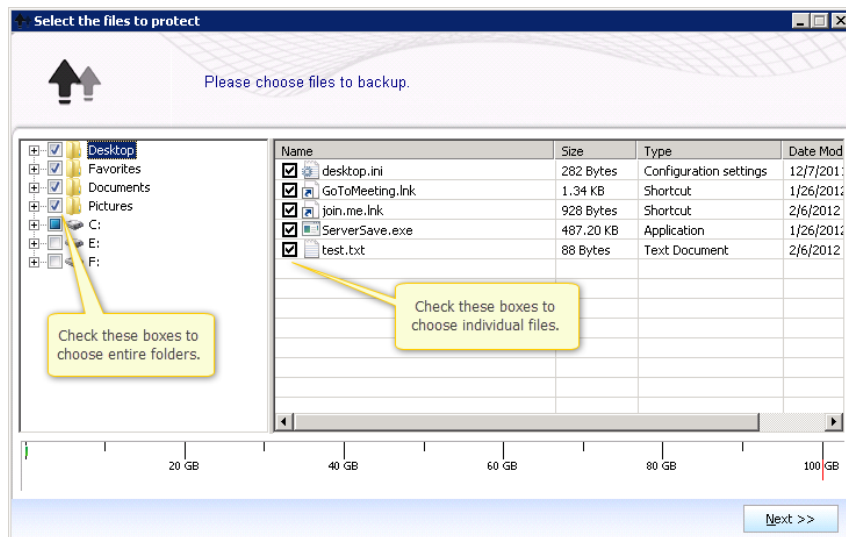


In the **Backup** tab, click the **Setup Backup** button. At the first screen if you have never been here before it will scan all folders. Once the scan is complete select/de-select the option you would like.



- **Scan all folders** - will scan the entire machine for recognized file types.
- **Scan Personal folders** - will scan personal folders for files - ex: my documents, pictures, etc.
- **Do not scan** – manually select your folders/files.

In the window that appears next, you can select folders and /or individual files that you want to backup. See the figure below for visual cues. In consideration of performance, bandwidth and potential space constraints, we do not recommend backing up an entire drive with **SOS Online Backup & Recovery Manager** (e.g., C:\).



When you're happy with the file and folder selections, click the **Next** button in the lower right corner of the window.

IMPORTANT: We strongly recommend against backing up the entire C:\ drive, as there are many system files that are unnecessary for recovery.

In the next window, you may configure the scheduling. Review the default settings, and then decide if you need to make any changes.

- Uncheck **Backup at the end of this wizard** if you would rather wait to perform the backup at the time you schedule.
- Uncheck **Backup automatically without user intervention** if you would rather receive a prompt before the backup begins. If you leave a check in this box, the backup will start automatically at the time you schedule. We recommend this for your first backup.
- Check the box **Backup even when Windows user is not logged on** if you would like the backup to run when the computer is running with no active user logged in.
- Notice the **Frequency** and **Timing** sections. The default **Frequency** is **Daily**, and the **Timing** is set to the time at which **Online Backup & Recovery Manager** was launched. You can change the **Timing** by editing the hour, minutes and AM/PM setting. (If you desire to stop the backup after a specific number of hours, you can edit the corresponding **Windows Scheduled Task** after configuring the backup).

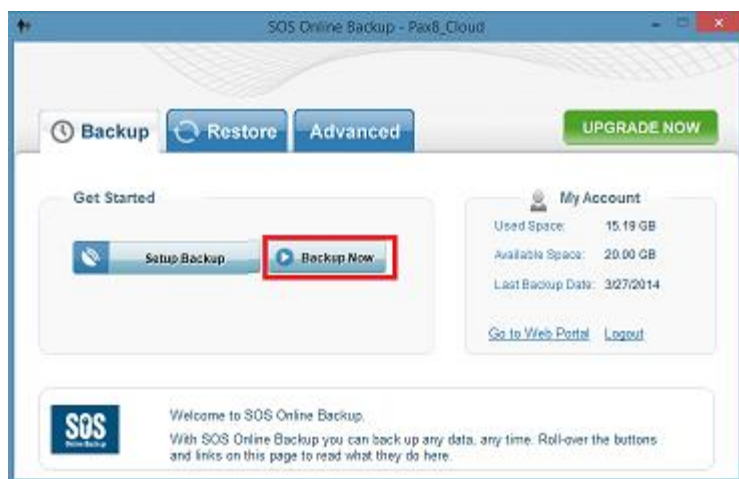
IMPORTANT: Large, frequent backups may cause a significant decrease in computer performance.

- If you prefer, you can change the frequency to **Hourly** and then select the number of **Hours** indicating how often you want the backup to occur. It's important to realize that large, frequent backup sets may decrease the performance of the computer for other applications.
- Alternatively, you could choose **Weekly** and then choose a time and day, or choose **Monthly** and select the time of day and the day of the month on which to perform the backup.

- Optionally, you can check the box **Send email reports at the end of backup** to send a backup status report to the email address that you specify the text box immediately below (every time a backup completes).
- Click the **Finish** button to complete the schedule setup.

Immediate Backup

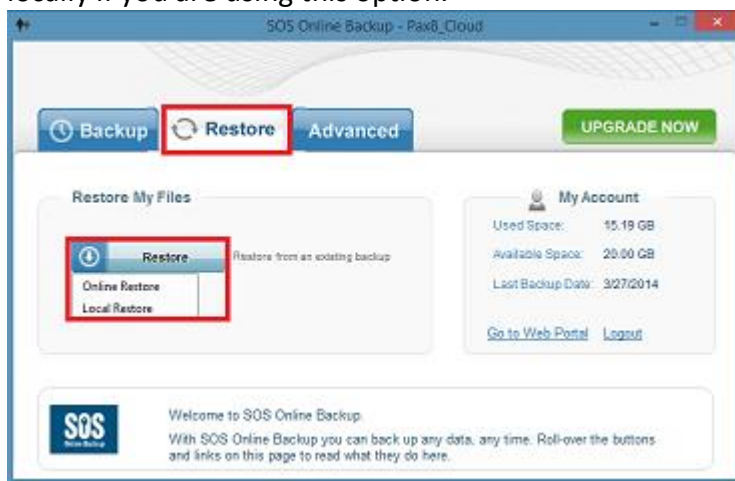
If you want to perform a backup now, simply go to the **Backup** tab and click the **Backup Now** button. This backup will go into online storage along with any other backups. (It will appear in the listing between the backups that run on the regular schedule).



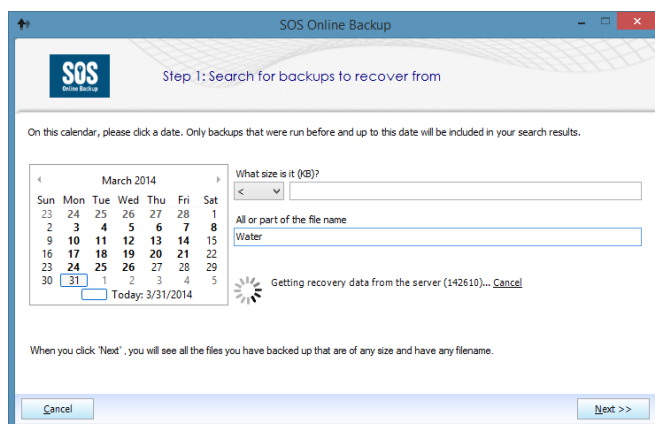
Restoring Files

It's also quite easy to restore your files. Follow these steps:

- Click the **Restore** tab, and then click the **Online Restore** button. You can choose to restore from folders and files that are online (backed up to the cloud) or restore from folders/files locally if you are using this option.



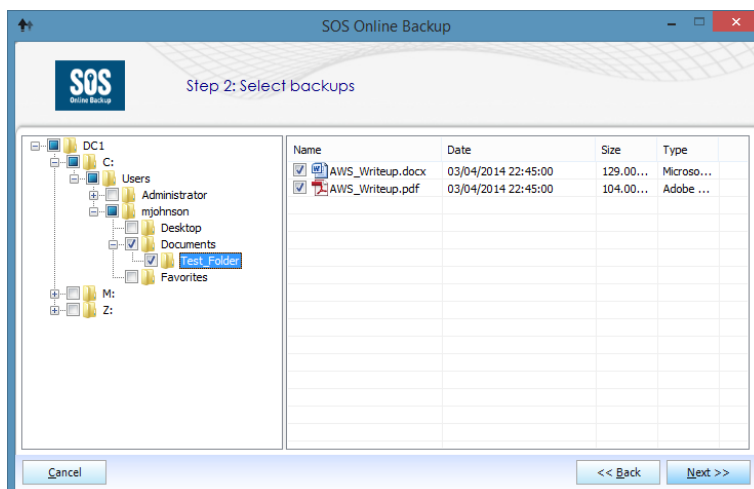
- If you selected **Online Restore** the next window that appears allows users to specify filters to search for a specific backup.



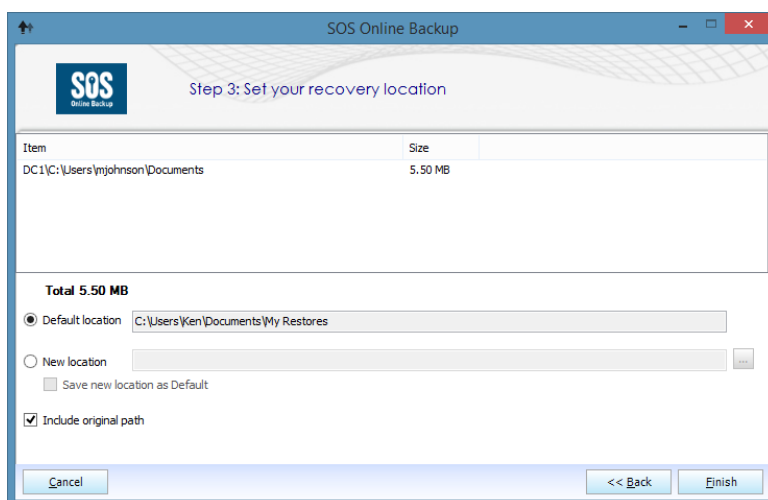
- The most important setting is the date. Move the calendar arrows and locate a date that has bold font. The search will look for all backups that were taken on or before this date.

NOTE: This process may take up to 60 minutes for backup accounts containing 1 million files or more. However, the second time you want to restore, the refresh process will happen much more quickly.

- You can also restrict your search by size (such as > 1,000 KB) and file type (such as Movie Clip, *.mpeg).
- To be even more specific in your search, you can also enter all or part of a filename.
- Click **Next** to continue. On the next panel, you'll encounter a listing of the files and folders that meet the search criteria from the previous panel. Choose the specific files and / or folders you need to restore, or simply check the topmost checkbox to restore the entire backup.



- Click **Next** to move on to the last step. Choose either the **Default location** or **New location**. The default location is the original path of the files. If you choose **New** location, then also click the ellipsis button (...) to select a new folder location.



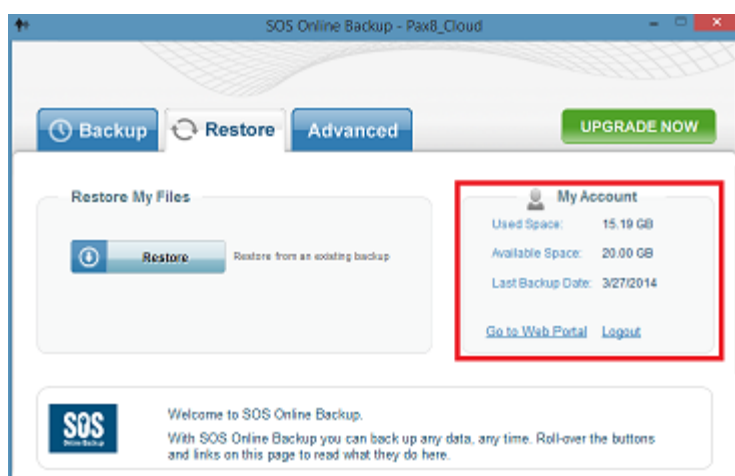
NOTE: If you are going to restore and entire folder with “Original path”, then we recommend that you choose a root drive letter. A folder will be created with the system name of the data you are restoring.

- Optionally, you can indicate that you want to **Save new location as Default**, which will save the new folder location as the restoration path for this backup set.
- Also, you can uncheck the box **Include original path**. This will cause the restore operation to place all of the files into a single folder, instead of preserving the original folder structure.

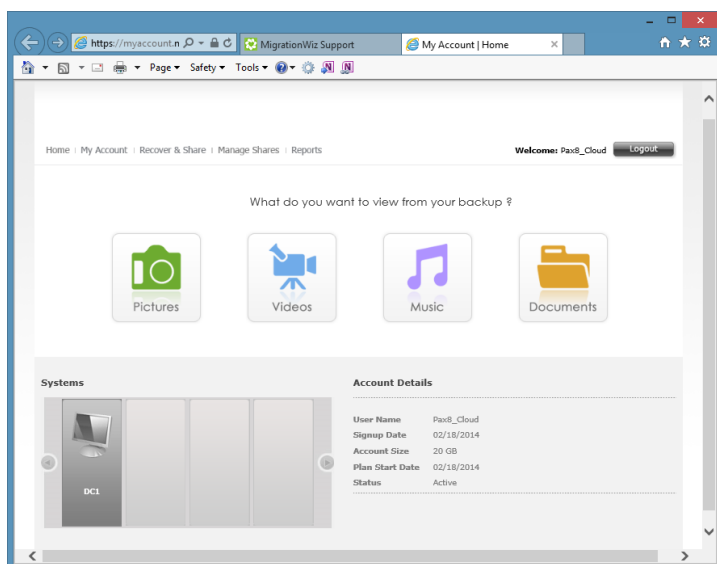
- Click **Finish** to begin the restore operation.
- When the restore is complete, a window will appear to display the results. You'll see a count of the files successfully recovered and also a count of any files that were unrecoverable.
- Click the **Details** button to view the restore report, or click the **Close** button to exit.

My Account and the Web Portal

On the right side of the **SOS Online Backup & Recovery Manager** main window, you'll see the **My Account** section. There you will find several items of important information:

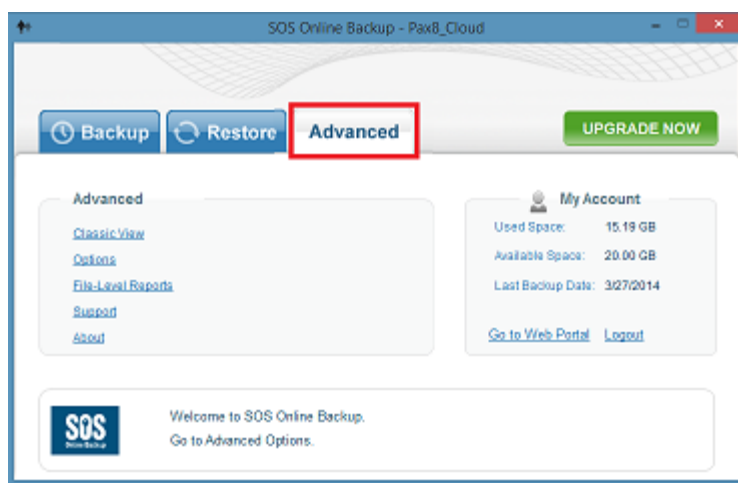


- **Used Space** – This is the amount of space that all of your backups presently consume in your **SOS** account
- **Available Space** – This is the amount of space remaining in your **SOS** account
- **Expiration Date** – This is the date on which you should renew your **SOS** account
- **Last Backup Date** – Displays the date of the very last backup sent to the cloud by Online Backup & Recovery Manager
- **Go to Web Portal** – Sends the user to their Infrascale Cloud Portal where they can access backed up folders/files to share or restore.



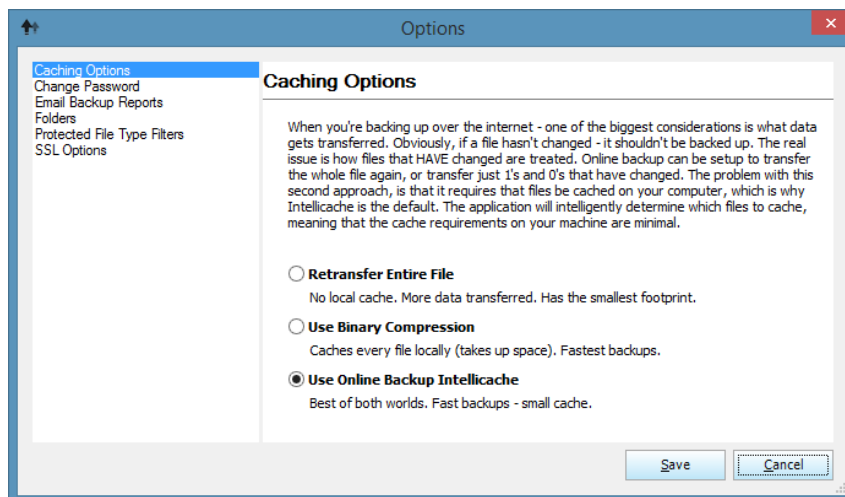
Advanced Tab

In the upper left corner of the **SOS Online Backup & Recovery Manager** main window, you'll see the **Menu** drop-down list. Click on the arrow to display a list of options:



- **Classic View** – Select this menu choice to switch to the classic interface (Directory/Folder/Files)
- **Options** – Choose this menu item to launch the **Options** window, which we describe in detail below
- **Logout** – Choose this item to exit and logout of **SOS Online Backup & Recovery Manager**
- **About** – Select this item to view information about the version of **SOS Online Backup & Recovery Manager** copy that you are running on your computer.

SOS Online Backup & Recovery Manager Options Menu



Caching Options

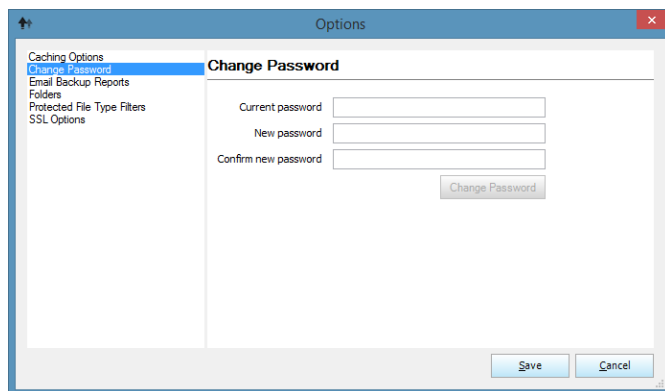
SOS Online Backup & Recovery Manager provides you with three types of caching performance options:

- **Retransfer Entire File** – Choose this option to maintain the smallest local cache footprint, but realize that the backup speed will be slower
- **Use Binary Compression** – All files will be stored in a local cache, which might be fine if you maintain sufficient disk space for this cache. Backups will run the fastest when you select this option
- **Use Online Backup Intellicache** – this is the default option, which optimizes for a balance between local cache size and backup speed. Click on the following URL for advanced Caching setup options:

<https://support.sosonlinebackup.com/entries/21561237-how-to-modify-cache-settings>

Change Password

To change your password, click the **Change Password** option located in the left hand pane of the Options window; on the right hand side you will see the fields to change your password.

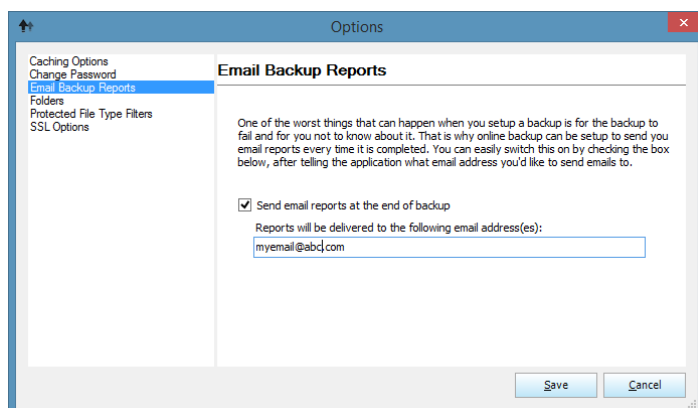


1. Enter your Current password in the Current password field.
2. Enter your **New password** in the New password field.
3. Enter your new password once more in the **Confirm new password** field.
4. Once all fields are completed click the button labeled Change password.
5. Once the new password has been recorded click Save to exit this window.
6. After you change your password, close **SOS Online Backup & Recovery Manager** and login again.

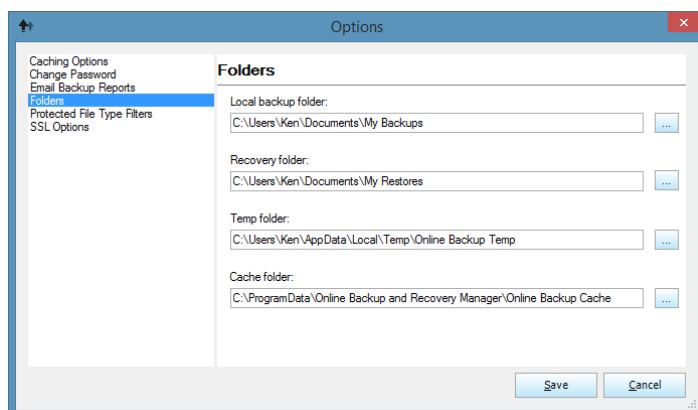
NOTE: You won't be able to change your password if a backup is running.

Email Backup Reports

You can change the email address to which backup reports are sent. To do so, click the **Email Backup Reports** item in the listing and then enter the new address in the text box. You can also uncheck the box if you no longer want any reports to be sent at all.



Folders

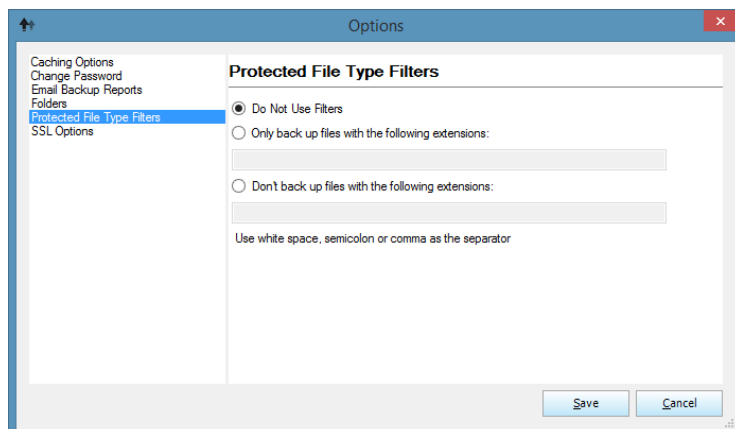


- **Online Backup & Recovery Manager** uses several local folders, each of which you may change to meet your local storage needs. In order to access these folders select the Folders option from the left hand pane. The options listed below will be listed. **Local backup folder** – default location for local backup application.
- **Recovery folder** – this folder will contain all of the files that you restore (see the **Recovering Files** section above).
- **Temp folder** – this is a temporary storage area for the Online Backup & Recovery Manager application.

- **Cache folder** – this is the cache folder (see the **Caching Options** subsection above)

Protected File Type Filter

This section allows you the option to include or exclude file types by extension. By default the Do Not Use Filters option is set. In order to make changes select the desired action and enter the appropriate file type in the provided field.



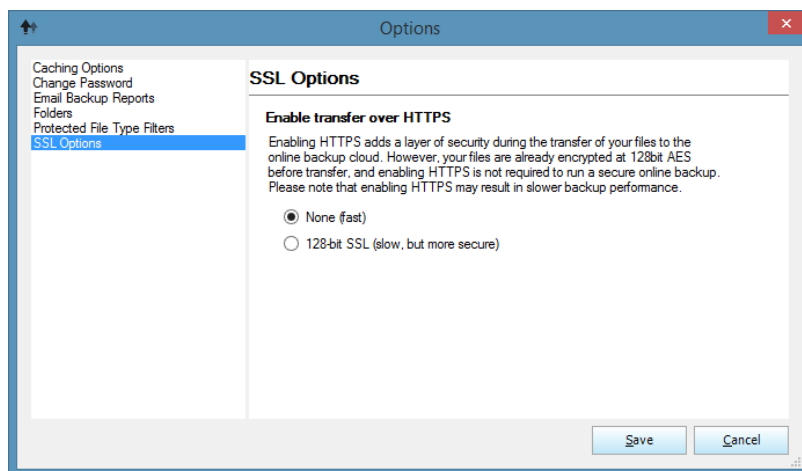
- **Only backup files with the following extensions:** By selecting this option you will be able to manually enter the type of files you want to be backed up. By selecting this option you are directing the application to only include the file types listed by you. All other file types will be excluded.
- **Don't back up files with the following extensions:** By selecting this option you will be able to manually exclude file types that you do not want backed up. By selecting this option you are directing the application to exclude the file types listed by you. All other file types will be included.

SSL Options

Enabling HTTPS adds a layer of security during the transfer of your files to the online backup cloud.

However, your files are already encrypted at 128-bit AES before transfer and enabling HTTPS is not required to run a secure online backup.

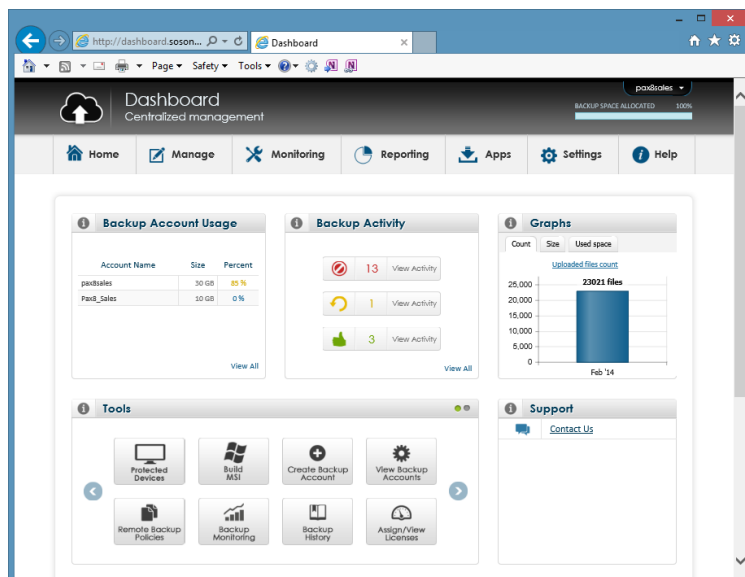
Enabling HTTPS may result in slower backup performance.



Using your Company Dashboard

A **Company Admin Account** is an *administrative account* owned by a single company/group/department wherein the admin has control to:

- Manage **Backup Accounts**
- Create Accounts
- Modify Backup Account Size
- Cancel Accounts
- Assign/un-assign licenses
- View/Export/Subscribe to **Monitoring Activity** for backup **deployments**
- A **deployment** is a particular backup account running on a specific machine
- View and Export **Historical Backup Activity** for all deployments
- Total data and # of files protected per backup session for each deployment
- Create and Assign **Backup Policies** to particular deployments A backup policy defines a backup set & schedule for a particular backup deployment



More on Backup Accounts

Company Admins can create backup accounts for the following:

1. Individual users
2. Departments/Groups
3. Servers (Groups of Servers)

Individual Users

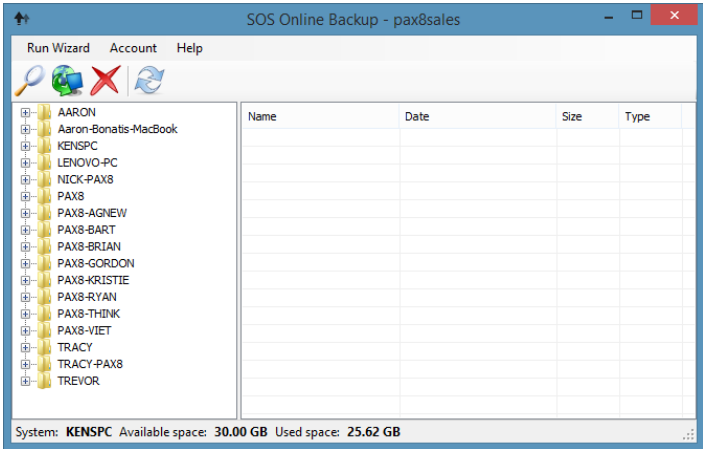
Individual users have their own username/password credentials and storage allocation. This provides a full level of security as only them and company admins have access to the backed up folders/files.

Departments/Groups

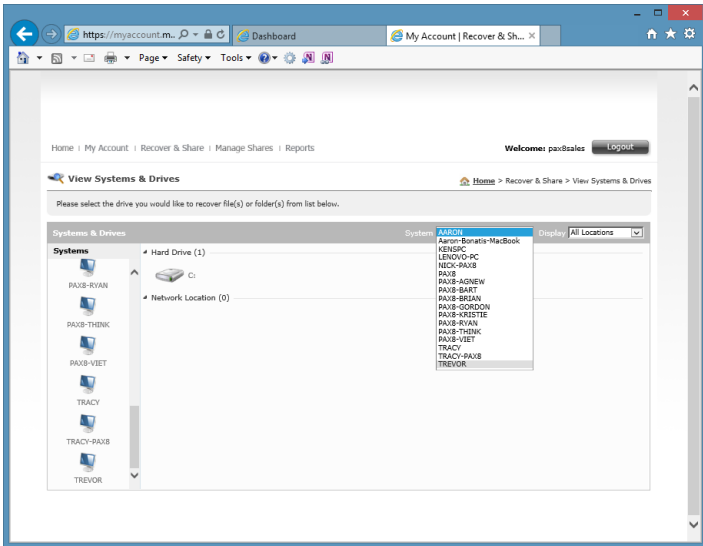
Company Admins can allocate backup storage for a department or group of users. For example, let's say you have three departments (Sales, Marketing and R&D). Admins can setup a separate backup account for each group, however all users within that group use the same username/password credentials.

Each user would install the OBRM agent to their PC/Laptop/MAC etc. Each user in the group has the capability to restore folders/files from any other user's device in the group. This is especially helpful for an admin in helping users recover lost or deleted files, however does present confidentiality concerns.

Users can see other users backed up folders/files.



Cloud Portal (Share/Recover)



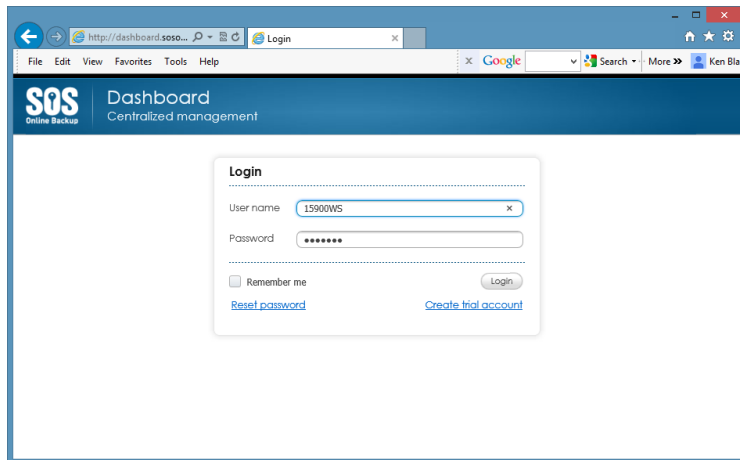
Servers/Groups of Servers

As with the previous two examples, admins can create a single backup account and attach all of their servers to it, or create separate backup accounts for each server depending on how they want to allocate their available storage and how they would like to manage the backup environment.

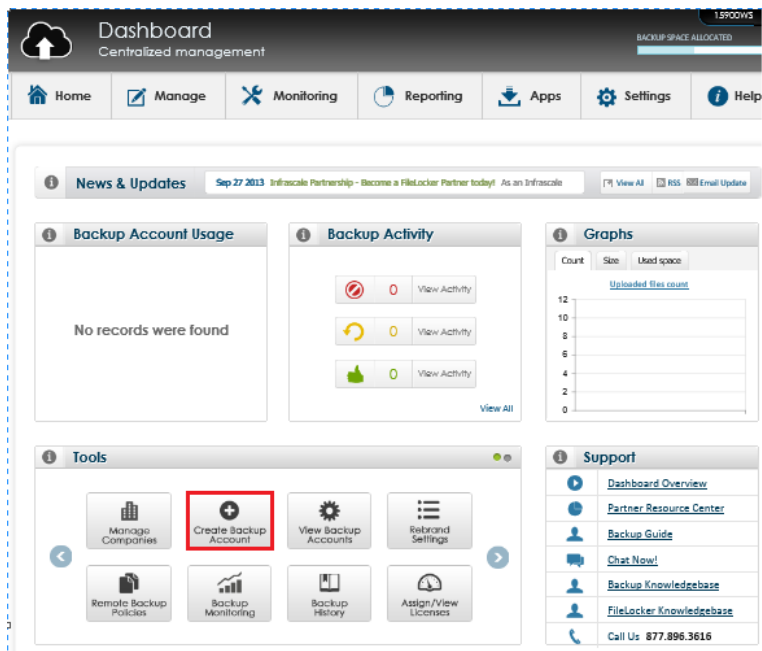
Creating a Backup Account

1. Login to the partner dashboard:

<http://dashboard.sosonlinebackup.com/Account/LogOn?ReturnUrl=%2f>



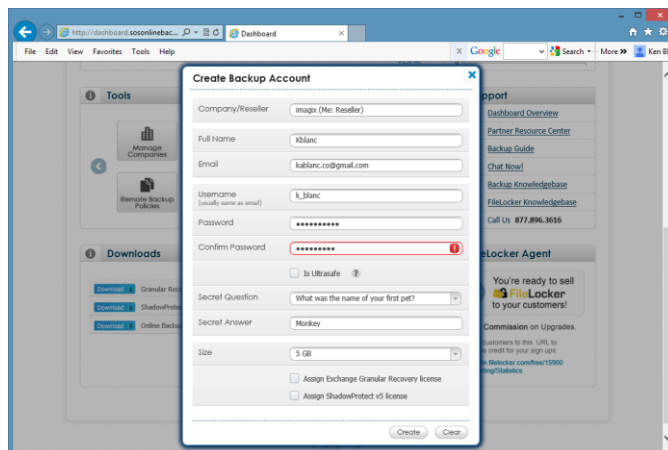
2. Under the **Tools Section** select **Create Backup Account**:



3. Fill in the account information (Username, Password, Secret Question, etc.) **IMPORTANT -- When allocating space keep in mind the following:**

Company Level – Minimum is 10GB (Auto creates account at 10GB)

- Additional Backup Accounts under the Company Account have a 5GB Minimum
- Increments are 10GB, 25GB, 50GB at all levels below 100GB



UltraSafe Accounts

On UltraSafe accounts, the key is held locally (the user knows their username and password) and no part of it is stored server side. **These accounts are unrecoverable should the password be forgotten.**

UltraSafe removes the security question from the account, and is used for HIPAA Compliance. If a user needs the data to be HIPAA Compliant, UltraSafe must be enabled. The password for UltraSafe accounts are only maintained by the end user setting it. We do not store UltraSafe password information and if the password is lost or forgotten the data in the account will be unrecoverable. The UltraSafe option cannot be enabled or disabled once the account is created.



Create Company With Admin Backup Account

Company Name

Quota In GB

EGR Licenses

SP v5 Licenses

Full Name

Email

Username
(usually same as email)

Password

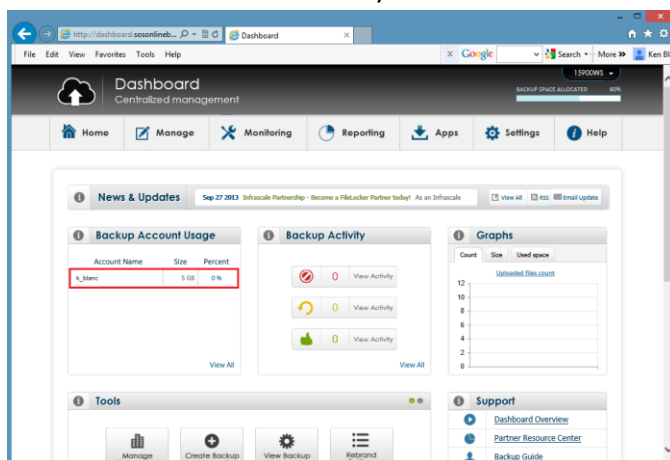
Confirm Password

☐ Is Ultrasafe ?

Secret Question

Secret Answer

Screen Shot Confirms the newly created account



4. Log in to the online backup/restore manager with your new account credentials and select the files and folders you want to backup.

Sign in into existing account

Sign in with existing user name

Sign In

Username or Email: k_blanc

Password: [masked]

[Forgot your password?](#)

☐ Log me in automatically

[Network Settings...](#)

Submit