Getting started

SaaS Backup For Office 365
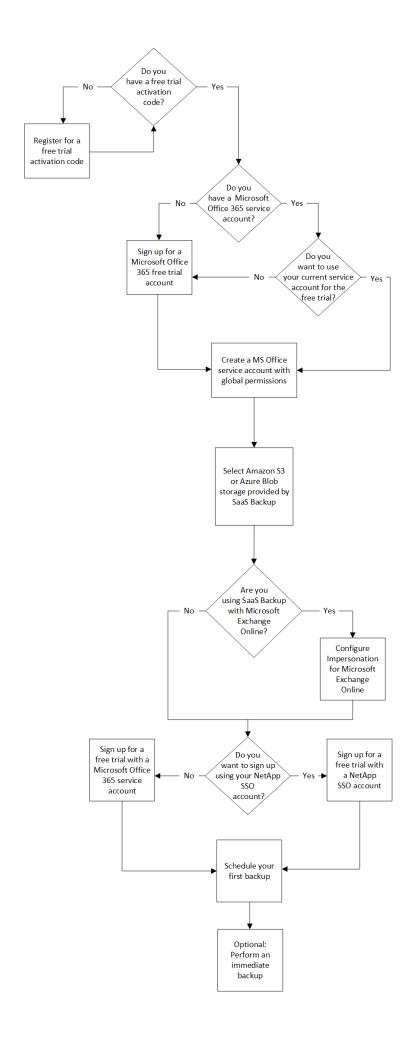
NetApp
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NetApp®

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Getting started

Getting started with a free trial

Workflow for getting started with a free trial of SaaS Backup for Office 365

To get started with a free trial of SaaS Backup for Office 365, you must do the following:

1. Be aware of the free trial restrictions.
2. Have a free trial activation code.
3. If needed, sign up for a Microsoft Office 365 test account.
4. Create a MS Office service account with global permissions.
5. Decide if you will use Amazon S3 or Azure Blob storage provided by SaaS Backup.
6. If needed, configure Impersonation for Microsoft Exchange Online.
7. Sign up for SaaS Backup for Office 365 using your Microsoft Office 365 account or your NetApp SSO account.
8. Schedule your first backup
9. Optional: Immediately back up your data

Do you have a free trial activation code?

No → Register for a free trial activation code

Yes → Do you have a Microsoft Office 365 service account?

No → Sign up for a Microsoft Office 365 free trial account

Yes → Do you want to use your current service account for the free trial?

No → Sign up for a Microsoft Office 365 free trial account

Yes → Create a MS Office service account with global permissions

Create a MS Office service account with global permissions

Select Amazon S3 or Azure Blob storage provided by SaaS Backup

Are you using SaaS Backup with Microsoft Exchange Online?

No

Yes → Configure Impersonation for Microsoft Exchange Online

Do you want to sign up using your NetApp SSO account?

No → Sign up for a free trial with a Microsoft Office 365 service account

Yes → Sign up for a free trial with a NetApp SSO account

Schedule your first backup

Optional: Perform an immediate backup

Free trial restrictions

The following restrictions apply to free trial accounts:

- A maximum of 25 users for Microsoft Exchange Online and 25 site collections for Microsoft SharePoint Online.

- A maximum of 3 immediate backups per day.

- Automated backups for only the first 30 days.

- No scheduled backups are allowed during the 15 day grace period after the free trial ends.

- A maximum of 10 restores are allowed in a 24-hour period for all services.

- TeamsChat backup is disabled by default and can be enabled upon request by sending an email to SaaS Backup Support at saasbackupsupport@netapp.com. To enable TeamsChat, all active Teams users must be licensed in SaaS Backup.

Registering for a free trial activation code

You must have an activation code in order to sign up for a free trial of SaaS Backup for Office 365. An activation code may have been provided to you by your channel partner or sales representative. If not, you must register to receive one.

Steps

1. Click here to go to the SaaS Backup for Office 365 free-trial URL.

2. Enter the requested registration information and click **Submit**.
   You will receive an email containing your free-trial activation code.

Signing up for a Microsoft Office 365 free trial account

With a free 30-day trial of Microsoft Office 365 for Business, you can discover the latest features of Microsoft Office 365 and SaaS Backup for Office 365.

Steps

1. Go to the Microsoft 365 for business site to start your trial subscription.
2. Click **Try 1 month free**.
3. Follow the on-screen instructions to create your Microsoft 365 free trial account.

Creating a new MS Office 365 service account with global administrator permissions

Creating a new Microsoft Office 365 service account with global administrator
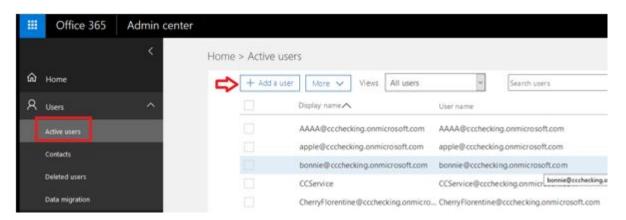
permissions is recommended when signing up for SaaS Backup for Office 365. However, creating a new account is not required. If you prefer, you can use your existing Microsoft Office 365 service account.
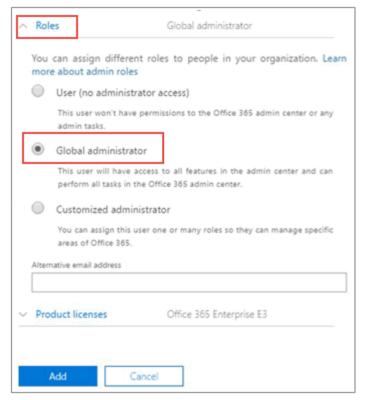
Steps

1. Log in to your Office 365 Management portal using an account with administrative privileges.

2. Click **Users**.

3. Select **Active users**, and then click **Add a user**.

4. Enter the details of the new service account.

   ◦ First name

   ◦ Last name

   ◦ Display name

   ◦ User name
     The user name is the name of the service account.

5. Expand **Roles**, select **Global administrator** as the role, and then click **Add**.

The service account details are sent to the administrator.

6. Log in to your Office 365 Management Portal with the new account to activate it.

7. Ensure that the service account includes licenses for Exchange Online and SharePoint Online, at a minimum.

   This is especially important if you restrict the individual licenses for the Global administrator role.

   > ℹ️   You can enable multi-factor authorization (MFA) on this account.

ZZZ Config account

As part of your SaaS Backup subscription, a new account is created with ZZZ CC Config [GUID].

This auto-created account is used for discovering Shared/Archive mailboxes and private groups. It should have Exchange and SharePoint permissions (customized administrator in O365). It is recommended that you exclude this account from MFA policies.

Configuring Impersonation for Microsoft Exchange Online

If you plan to use SaaS Backup with Microsoft Exchange Online, you must configure impersonation. Impersonation allows your Microsoft Office 365 service account to impersonate user accounts and access associated permissions.
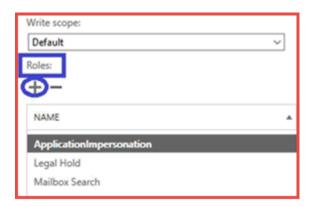
Automatically configuring impersonation

To automatically configure impersonation, run MSDN PowerShell Commands.

Manually configuring impersonation

To manually configure impersonation do the following:

Steps

1. Use Exchange Admin Center or an administrator account to log in to your Microsoft Office 365 service account.

2. Select the **Exchange** tab.

3. On the left, under Dashboard, select **Permissions**.

4. Click **Admin roles**.

5. Double-click in the right pane to select **Discovery management**.

6. Under **Roles**, click the + symbol.

7. Select **ApplicationImpersonation** from the drop-down menu.

8. Click **Add**.

9. Click **OK**.

10. Verify that **ApplicationImpersonation** was added under **Roles**.

11. Under Members, click the + symbol.

   A new window appears

12. Choose the user name.

13. Click **Add**.

14. Click **OK**.

15. Verify that the user name appears in the **Members** section.

16. Click **Save**.

Signing up for a free trial of SaaS Backup for Office 365

You can sign up for SaaS Backup for Office 365 with your Microsoft Office 365 service account or with your NetApp SSO account.

Signing up for a free trial with a Microsoft Office 365 service account

Steps

1. Enter the SaaS Backup for Office 365 URL into your web browser:
   https://saasbackup.netapp.com

2. Select your region.
   Your tenancy is created in the selected region. Your data will be stored in that datacenter location and cannot be changed later.

3. Click **Sign up** at the bottom of the landing page.

4. Accept the End-User License Agreement.

5. Click **Sign Up with Office 365**.

6. Enter the email address and password for your Microsoft Office 365 test or trial account, and then click **Sign in**.
   A list of the permissions requested by SaaS Backup for Office 365 is displayed.

7. Click **Accept**.

8. Enter the requested user information.

9. Click **Sign up**.
   Your user name and a list of permissions given to SaaS Backup for Office 365 is displayed.

10. Click **Next**.
    A list of the available Microsoft Office 365 services is displayed.

11. Select the Microsoft Office 365 services that you want to activate.

12. Click **Next**.

13. Select **Free Trial** for the subscription type.

14. Enter your free trial activation code provided by your channel partner or sales representative, or obtained through the registration email.

15. Click **Next**.

16. Select your backup storage option.

    a. Click **SaaS Backup Provided Storage**.

    b. Select the **Amazon S3** or **Azure Blob** storage option.

    c. Click **Next**.

    d. Review your configuration, and then click **Save**.

Signing up for a free trial with a NetApp SSO account

Steps

1. Enter the SaaS Backup for Office 365 URL into your web browser:
   https://saasbackup.netapp.com

2. Click Sign up at the bottom of the landing page.

3. Accept the End-User License Agreement.

4. Click **Sign Up with NetApp SSO**.

5. Enter your NetApp SSO and password, and then click **LOGIN**.

6. Enter the requested user information, and then click **Sign Up**.
   The free trial activation code you received from your channel partner, sales representative or in the registration email is required.

7. Click the icon.

8. Click the to select the SaaS service.

9. Click **Add Microsoft Office 365 Account**.

10. Enter the email address and password for your Microsoft Office 365 test or trial account, and then click **Sign in**.
    A list of the permissions requested by SaaS Backup for Office 365 is displayed.

11. Click **Accept**.

12. Click **Next**.
    A list of the available Microsoft Office 365 services is displayed.

13. Select the Microsoft Office 365 services that you want to activate.

14. Click **Next**.

15. Select **Free Trial** for the subscription type.
    Enter the activation code provided by your channel partner or sales representative, or obtained from a marketing representative through email.

16. Click **Next**.

17. Select your backup storage option.

a. Click **SaaS Backup Provided Storage**.

b. Select the **Amazon S3** or **Azure Blob** storage option.

c. Click **Next**.

d. Review your configuration, and then click **Save**.

Scheduling your first backup

When you set up SaaS Backup for Office 365, by default, your data is unprotected. You must move your data from the unprotected tier to one of the protected tiers to so that your data will be backed up during the next scheduled back up of the selected tier.

Steps

1. From the Dashboard, select the service containing the unprotected data.

2. Click **view** next to the number of unprotected mailboxes, MySites, sites or groups.

3. Select the items that you want to protect.

4. Click the **Groups** menu.

   📁 Groups ▾

5. Select the **tier** for the backup policy that you want to assign.
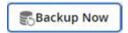   See Backup Policies for a description of the backup policy tiers.

6. Click **Apply**.

Performing an immediate backup of a specific backup policy

When you set up SaaS Backup for Office 365, by default, all of your data is unprotected. After you move your data to a protected tier, you can perform an immediate backup of the tier to which you moved your data. This prevents your data from being at risk until the first scheduled backup occurs. If you can wait for the first scheduled backup, performing an immediate backup is not necessary.

You can perform an immediate backup any time you deem necessary for data protection. If you are running a trial version of SaaS Backup for Office 365, you can only perform three immediate backups per day, per service.

Steps

1. From the Dashboard, select the service for which you want to perform an immediate backup.

2. Under **Backup Policies**, click the tier that you want to back up.

3. Click Backup Now.

A message is displayed indicating that the services under the selected tier will be placed in the job queue for immediate backup.

4. Click **Confirm**.
   A message is displayed indicating that the backup job was created.

5. Click **View the job progress** to monitor the progress of the backup.

Upgrading from a trial subscription

Upgrading from a trial subscription

When you upgrade from a trial subscription to a licensed subscription, your trial data is only preserved if you keep the same backup storage destination type and the same backup storage region.

If you change your backup storage destination type, your trial data is lost. Any change to your backup destination region also results in data loss.

If the backup destination of your trial subscription is…	And the backup destination of your licensed subscription is…	Your trial data is…
Amazon S3 provided by SaaS Backup	Amazon S3 provided by SaaS Backup	Preserved
Azure Blob provided by SaaS Backup	Azure Blob provided by SaaS Backup	Preserved

Steps

1. Click from the left navigation pane.

2. Click the Microsoft Office 365 link.

3. Under **Subscription details**, click .

4. Select your upgrade option, and then click **Next**.
   If you are purchasing through AWS Marketplace, select **AWS Marketplace**. Otherwise, select **NetApp License**.

5. If you selected **NetApp License**:

   a. Enter the license information, and then click **Validate Subscription**.
      A confirmation of your license information is displayed.

b. Click **Next**.

Your subscription storage information and including your storage destination and region is displayed.

c. If you want to change your destination storage type or destination storage region, do the following:

   i. Select your new destination storage type and/or region.

   > **ⓘ** If you change the destination of your storage or your destination region, NetApp SaaS Backup for Office 365 does not migrate the trial data. You must agree to proceed.

   ii. If you are changing the destination storage type, enter the required information and click **Test Connection**.

   iii. Click **Next**.

   iv. Review your configuration, and then click **Save**.

d. If you want to keep the same destination storage type and destination storage region, review your configuration and click **Save**.

6. If you selected **AWS**, **AppDirect**, or **StreamOne**:

   a. Click the link to go to the selected Marketplace.

   b. Follow the Marketplace instructions.

   > **ⓘ** Licensed subscriptions through AWS marketplace can only use the Amazon S3 storage provided by SaaS Backup.

   c. Sign in to SaaS Backup for Office 365 with your Microsoft Office 365 account.

   d. Click the Microsoft Office 365 settings icon ⚙.

   e. Under Subscription details, click ⏻ Activate .

   If you selected a backup storage that is different from your trial subscription, a warning is displayed. SaaS Backup for Office 365 does not migrate the trial data to the new destination. You must agree to proceed.

   > **ⓘ** If you select to have fewer users in your licensed subscription than in your trial subscription, all user accounts are moved to the unprotected tier when the licensed subscription is activated. After activation, you must manually move the desired accounts into a protected tier.

   f. Click **Save**.

   g. If you haven't already done so, activate support.

Activating support

If you purchased SaaS Backup through NetApp, support is activated by default. If you purchased SaaS Backup through a Cloud Marketplace such as AWS, you must activate support. Activating support enables you to access technical support over the phone, online chat, or web ticketing system.

If you are upgrading from a trial version of SaaS Backup, you can activate support either before or after you complete the upgrade process.

Before you Begin

In order to activate support, you must have a NetApp SSO user ID and password. If you do not have a NetApp SSO account, go to http://register.netapp.com to register for one. After your request has been processed, you will receive an email notification containing your NetApp SSO credentials. It will take approximately 24 hours to process the request and send the notification email.

Steps

1. Click from the left navigation pane.

2. Click the settings icon .

3. In the **Activate Support** box, click **Activate**.

4. Enter your NetApp SSO username and password.

5. Click **Activate**.

The support status is now **Active**.

Free trial data deletion

If you do not upgrade to a licensed version of SaaS Backup for Office 365, the data used during your free trial period is deleted as follows:

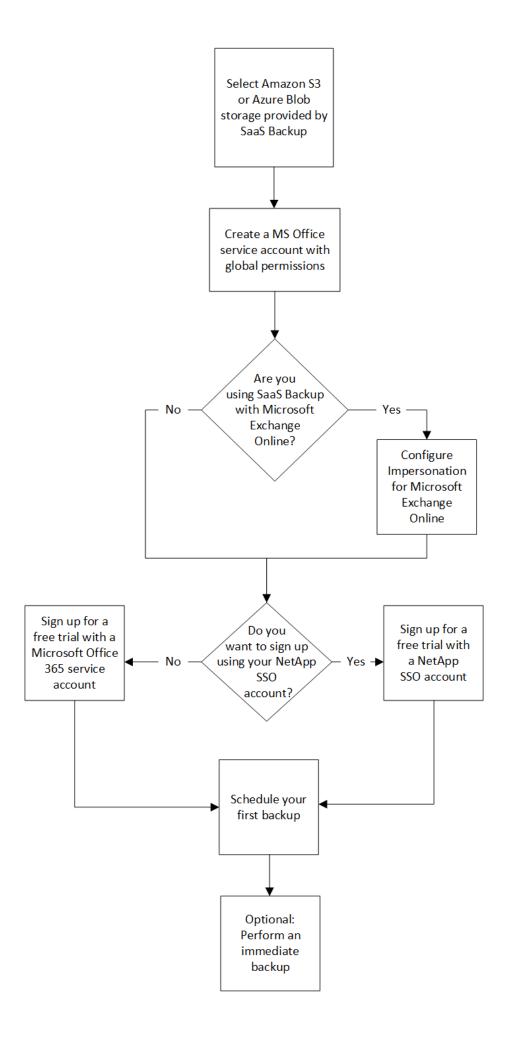| If your SaaS Backup free trial is...	Number of days after end of trial	Your data is...
Expired	1-15 days	Available: The administrator has normal access and can perform manual backups and restores. SaaS Backup continues to display alerts and send out notifications.

If your SaaS Backup free trial is...	Number of days after end of trial	Your data is...
Disabled	16-30 days	Deactivated: The administrator does not have access to the SaaS Backup portal. If subscription is updated during this period, data can be reactivated.
Deprovisioned	31 or more days	Deleted: All data is deleted and your tenant account is removed.

Getting Started with a Paid Subscription

Workflow for getting started with a paid subscription to SaaS Backup for Office 365

To get started with a paid subscription to SaaS Backup for Office 365, you must do the following:

1. Decide if you will use Amazon S3 or Azure Blob storage provided by SaaS Backup.

   Storage types you can use with SaaS Backup.

2. Create a MS Office service account with global permissions.
3. If needed, configure Impersonation for Microsoft Exchange Online.
4. Sign up for SaaS Backup for Office 365 using your Microsoft Office 365 account or your NetApp SSO account.
5. Schedule your first backup
6. Optional: Immediately back up your data

```
                    ┌─────────────────┐
                    │ Select Amazon S3 │
                    │ or Azure Blob    │
                    │ storage provided │
                    │ by SaaS Backup   │
                    └────────┬────────┘
                             │
                             ▼
                    ┌─────────────────┐
                    │ Create a MS Office│
                    │ service account  │
                    │ with global      │
                    │ permissions      │
                    └────────┬────────┘
                             │
                             ▼
                         Are you
                      using SaaS Backup
       No ◄───────    with Microsoft    ───► Yes
                         Exchange
                          Online?
                                              │
                                              ▼
                                    ┌─────────────────┐
                                    │ Configure        │
                                    │ Impersonation    │
                                    │ for Microsoft    │
                                    │ Exchange         │
                                    │ Online           │
                                    └─────────────────┘
```

Select Amazon S3 or Azure Blob storage provided by SaaS Backup

Create a MS Office service account with global permissions

Are you using SaaS Backup with Microsoft Exchange Online?

No

Yes — Configure Impersonation for Microsoft Exchange Online

Sign up for a free trial with a Microsoft Office 365 service account

Do you want to sign up using your NetApp SSO account?

No

Yes — Sign up for a free trial with a NetApp SSO account

Schedule your first backup

Optional: Perform an immediate backup

Creating a new MS Office 365 service account with global administrator permissions

Creating a new Microsoft Office 365 service account with global administrator permissions is recommended when signing up for SaaS Backup for Office 365. However, creating a new account is not required. If you prefer, you can use your existing Microsoft Office 365 service account.

Steps

1. Log in to your Office 365 Management portal using an account with administrative privileges.

2. Click **Users**.

3. Select **Active users**, and then click **Add a user**.

4. Enter the details of the new service account.

   ◦ First name

   ◦ Last name

   ◦ Display name

   ◦ User name
     The user name is the name of the service account.

5. Expand **Roles**, select **Global administrator** as the role, and then click **Add**.

The service account details are sent to the administrator.

6. Log in to your Office 365 Management Portal with the new account to activate it.

7. Ensure that the service account includes licenses for Exchange Online and SharePoint Online, at a minimum.

   This is especially important if you restrict the individual licenses for the Global administrator role.

   > ℹ️ You can enable multi-factor authorization (MFA) on this account.

ZZZ Config account

As part of your SaaS Backup subscription, a new account is created with ZZZ CC Config [GUID].

This auto-created account is used for discovering Shared/Archive mailboxes and private groups. It should have Exchange and SharePoint permissions (customized administrator in O365). It is recommended that you exclude this account from MFA policies.

Configuring Impersonation for Microsoft Exchange Online

If you plan to use SaaS Backup with Microsoft Exchange Online, you must configure impersonation. Impersonation allows your Microsoft Office 365 service account to impersonate user accounts and access associated permissions.

Automatically configuring impersonation

To automatically configure impersonation, run MSDN PowerShell Commands.

Manually configuring impersonation

To manually configure impersonation do the following:

Steps

1. Use Exchange Admin Center or an administrator account to log in to your Microsoft Office 365 service account.

2. Select the **Exchange** tab.

3. On the left, under Dashboard, select **Permissions**.

4. Click **Admin roles**.

5. Double-click in the right pane to select **Discovery management**.

6. Under **Roles**, click the + symbol.

7. Select **ApplicationImpersonation** from the drop-down menu.

8. Click **Add**.

9. Click **OK**.

10. Verify that **ApplicationImpersonation** was added under **Roles**.

11. Under Members, click the + symbol.

A new window appears

12. Choose the user name.

13. Click **Add**.

14. Click **OK**.

15. Verify that the user name appears in the **Members** section.

16. Click **Save**.

Signing up for a paid subscription of SaaS Backup for Office 365

You can sign up for SaaS Backup for Office 365 with your Microsoft Office 365 service account or with your NetApp SSO account.

Signing up for a paid subscription with a Microsoft Office 365 service account

Steps

1. Enter the SaaS Backup for Office 365 URL into your web browser:
   https://saasbackup.netapp.com

2. Select your region.
   Your tenancy is created in the selected region. Your data will be stored in that datacenter location and cannot be changed later.

3. Click **Sign up** at the bottom of the landing page.

4. Accept the End-User License Agreement.

5. Click **Sign Up with Office 365**.

6. Enter the email address and password for your Microsoft Office 365 global administrator service account, and then click **Sign in**.
   A list of the permissions requested by SaaS Backup for Office 365 is displayed.

7. Click **Accept**.

8. Enter the requested user information.

9. Click **Sign up**.
   Your user name and a list of permissions given to SaaS Backup for Office 365 is displayed.

10. Click **Next**.
    A list of the available Microsoft Office 365 services is displayed.

11. Select the Microsoft Office 365 services that you want to activate.

12. Click **Next**.

13. If you purchased your license through NetApp, your subscription types are displayed
    Click here for additional steps.

14. If you purchased your license through a Cloud Marketplace, such as AWS, your license information is displayed.
    Click here for additional steps.

Signing up for a paid subscription with a NetApp SSO account

Steps

1. Enter the SaaS Backup for Office 365 URL into your web browser:
   https://saasbackup.netapp.com

2. Click Sign up at the bottom of the landing page.

3. Accept the End-User License Agreement.

4. Click **Sign Up with NetApp SSO**.

5. Enter your NetApp SSO and password, and then click **LOGIN**.

6. Enter the requested user information, and then click **Sign Up**.

7. Click the **Services** icon.

8. Click the Microsoft Office 365 icon to select the SaaS service.

9. Click **Add Microsoft Office 365 Account**.

10. Enter the email address and password for your Microsoft Office 365 global administrator service account, and then click **Sign in**.
    A list of the permissions requested by SaaS Backup for Office 365 is displayed.

11. Click **Accept**.

12. Click **Next**.
    A list of the available Microsoft Office 365 services is displayed.

13. Select the Microsoft Office 365 services that you want to activate.

14. Click **Next**.

15. Select **Licensed** for the subscription type.

16. Enter the requested information, and then validate the subscription.

17. Click **Next**.

18. Select your backup storage option.

    a. Click **SaaS Backup Provided Storage**.

    b. Select the **Amazon S3** or **Azure Blob** storage option.

    c. Select the **AWS S3** or **Azure Blob** region for your backup.
       You should select the region that is the closest to the physical location of the data you are backing up.

    d. Click **Next**.

    e. Review your configuration, and then click **Save**.

Scheduling your first backup

When you set up SaaS Backup for Office 365, by default, your data is unprotected. You must move your data from the unprotected tier to one of the protected tiers to so that your data will be backed up during the next scheduled back up of the selected tier.

Steps

1. From the Dashboard, select the service containing the unprotected data.

2. Click **view** next to the number of unprotected mailboxes, MySites, sites or groups.

3. Select the items that you want to protect.

4. Click the **Groups** menu.

5. Select the **tier** for the backup policy that you want to assign.
   See Backup Policies for a description of the backup policy tiers.

6. Click **Apply**.

Performing an immediate backup of a specific backup policy

When you set up SaaS Backup for Office 365, by default, all of your data is unprotected. After you move your data to a protected tier, you can perform an immediate backup of the tier to which you moved your data. This prevents your data from being at risk until the first scheduled backup occurs. If you can wait for the first scheduled backup, performing an immediate backup is not necessary.

You can perform an immediate backup any time you deem necessary for data protection. If you are running a trial version of SaaS Backup for Office 365, you can only perform three immediate backups per day, per service.

Steps

1. From the Dashboard, select the service for which you want to perform an immediate backup.

2. Under **Backup Policies**, click the tier that you want to back up.

3. Click Backup Now.

   A message is displayed indicating that the services under the selected tier will be placed in the job queue for immediate backup.

4. Click **Confirm**.

A message is displayed indicating that the backup job was created.

5. Click **View the job progress** to monitor the progress of the backup.