



How to Create a Backup Guide

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Introduction

Metalogix Essentials for Office 365 allow users to create backup snapshots of the content stored in their Office 365 tenants, specifically SharePoint Online Sites, Exchange Online Mailboxes and OneDrive for Business Sites.

This goal of this documents is to provide a basic procedure to become familiar with how to setup, schedule and execute a backup.

The following should be considered as guidance to become acquainted with the software. For information about specific features of the software, please refer to the User Manual found in the software's Help menu or visit the following link:

<http://manual.metalogix.com>

The Basics and Planning

Let's begin with the basics. The Essentials for Office 365 solution should be installed in a location where computer resources are abundant and you have full local admin permissions to install, configure, schedule and execute operations. If you are planning to store your backups on a local or network file share be sure to have both read and write permissions to this location and if you are choosing the cloud option, make sure to have full read and write permissions to your Azure or Amazon storage account. And of course, you will need the appropriate permissions in Office 365 to be able to connect, backup and restore to the various services. To keep permissions simple, please have the following:

- For SharePoint Online, you will need to have Site Collection Administrator permissions for every site or site collection you wish to backup
- For OneDrive for Business, you will need to have Global Administrator to your tenant
- For Exchange Online, you will need to have Global Administrator to your tenant.

When it comes to planning, you will need to decide what is mission or business critical and therefore needs to be backed up. I know the easy method is to select the Include All option, but with that comes caveats. Most apparent is that the more you include the longer the back will take to complete and the more storage space it will consume, so before you click that option decide if it is business critical to use this option. Content from Office 365 takes time to extract and the more backups that are running concurrently the resource consumption that will take place.

Note: If you have not already, please consider reading the Essentials for Office 365 Performance Optimization Guide for a deeper understanding of resource consumption and optimal configuration of the solution.

As a simple example, imagine you want to create an OneDrive for Business backup for 500 users and each user has an average of 25GB of content in their Documents library. That means you are creating a backup project that will initially contain over 12.5TB (terabytes) of content. Extracting or downloading that amount of content from Office 365 or any online location will take a considerable amount of time, not measured in hours or days, but rather in weeks. Please plan accordingly based on what is considered mission or business critical content.

Backup Structure

Backup projects in Essentials for Office 365 can be classified into two areas, new and update backups. New backups create the initial project and the first backup (first backup is always a Full backup) and updates are performed against existing projects and can be configured as Incremental, Differential or Full backups.

You are given the choice to store your backups in either a Cloud or Local location, regardless of your choice, the backup structure will be the same. Now let's examine these in a little more detail before we create our first backup project.

New Backups

The first operation performed will be the New backup and this is typically created using the application's user interface (as opposed to scripting or scheduling). Once created, the backup project will consist of two folders in which many different objects including the structure of the site or mailbox, various configuration files and of course the content, metadata and security of the objects are stored. You will also notice a single folder that represents the time (Year-Month-Day Hour-Minute-Second) at which the first Full backup began. This will correspond to the snapshot that will eventually appear in the Application's Backup Navigator.

Update Backups

After the new backup is complete, you can now consider creating updates. Updates (regardless of type) will be stored in the same folder location as the new backup, but will be contained within its own timestamped folder based on the time this update began.

Note: The backups are stored normalized and no additional security, encryption or wrappers are added to them. Please be sure to secure this backup storage location to only those who should have access to the backed up data.

Creating a Backup

Now it's time to create our first backup project. Essentials for Office 365 supports individual backup projects for SharePoint Online, Exchange Online Mailboxes and OneDrive for Business Sites so we will provide an initial walkthrough for each.

SharePoint Online Backup

SharePoint Online backup can contain up to one site collection per project, so if multiple site collections (or individual SharePoint sites) is required, you will need to create a separate project for each. You will be required to provide SharePoint Online credentials that have at least Full Owner to the site(s) being backed up, Site Collection Admin is recommended.

New SharePoint Online Backup

To create your first SharePoint Online backup, please follow these steps.

1. Start the Essentials for Office 365 solution and accept and install any software updates that are available. Running the most recent version is ideal since we do release new features and optimizations to the backup software on a regular basis.

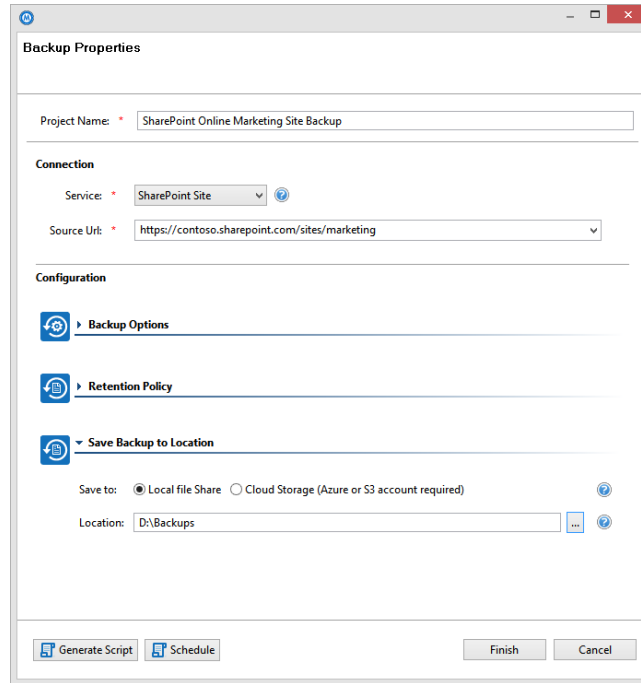
2. Either choose the Backup option on the left side of the Welcome Page and click on the Backup tab above the application's ribbon.
3. Your first decision, do you want to create a backup that will be stored locally (local or network file storage) or one that will be stored in your Cloud provider (Azure or Amazon). Depending on your requirement, select the appropriate option in the Backup ribbon, either 'To Local Storage' or 'To Cloud Storage'.



Choose either To Local or To Cloud Storage located in the Backup ribbon

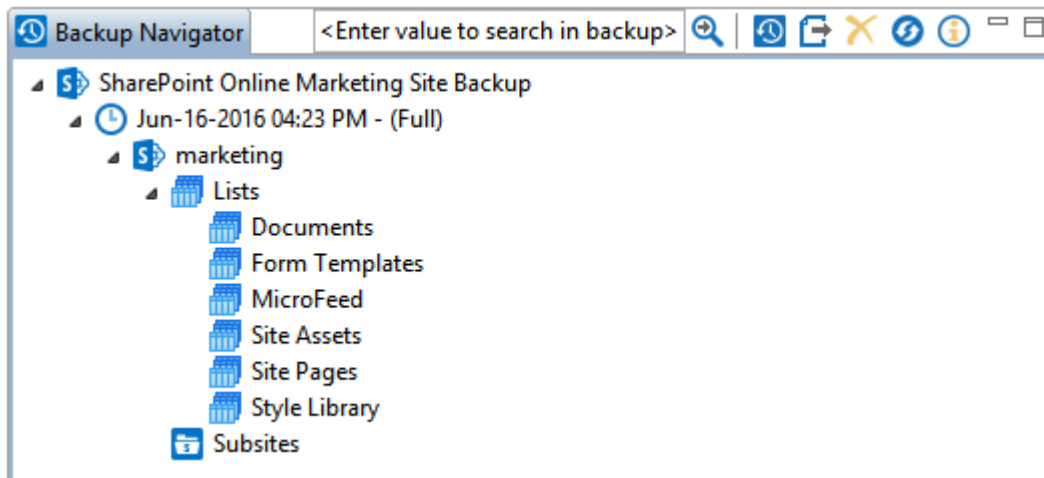
4. A new dialog box will now appear that will step you through the process of configuring your backup.
 - a. **Project Name** – Enter a unique name that will then appear in the Backup Navigator
 - b. **Service** – Choose 'SharePoint Site'
 - c. **Source URL** – Enter the URL to the SharePoint Online Site that you wish to backup. For example, <https://contoso.sharepoint.com/sites/marketing> or <https://contoso.sharepoint.com/sites/marketing/commercials>
 - d. **Configuration: Backup Options** – Choose the options that you wish to configure for this backup project. For details about the options, please refer to the User Manual located in the Help tab. Please note that the more options selected, the more processing, storage and time that will be required to complete the backup operation.
 - e. **Configuration: Retention Policy** – Choose to specify a retention policy in days for the Full or Update backups. If you do not want to apply a retention policy, leave both options unchecked.
 - f. **Configuration: Save to Location** – This determines where the backup project will be stored. If you chose Local in step 1 that will be the default configuration or if you chose Cloud in step 1 then that will be the default, however you may change the selection now if you wish. For the Location field, click the ellipsis (...) button to the right to select the actual path that will be used for storage.
5. Once you are satisfied with your configuration, click Finish to begin. If you have not already entered your credentials, you will be prompted to do so now. Make sure to provide a username and password that has at least Full Control to this site, Site Collection Administrator is preferred. Once the credentials have been verified, the backup process will begin shortly.

Note: This first backup will be a Full, so depending on the amount of content contained and the number of objects configured, this initial operation may take hours, days or even weeks to complete and can consume many GBs or more of storage space.



SharePoint Online backup configuration

6. When the first backup is complete, you will either receive a message in the user interface or if configured, an email will be sent to let you know the backup is complete. Your project will now appear in the backup navigator. The structure in the Backup Navigator will be in the following format:
 - Backup Project Name
 - Timestamp of the backup operation (backup type: Full, Incremental, Differential)
 - SharePoint Site Name
 - Lists
 - {Lists and Libraries that were backed up}
 - Subsites
 - Subsite Site Name (if any)

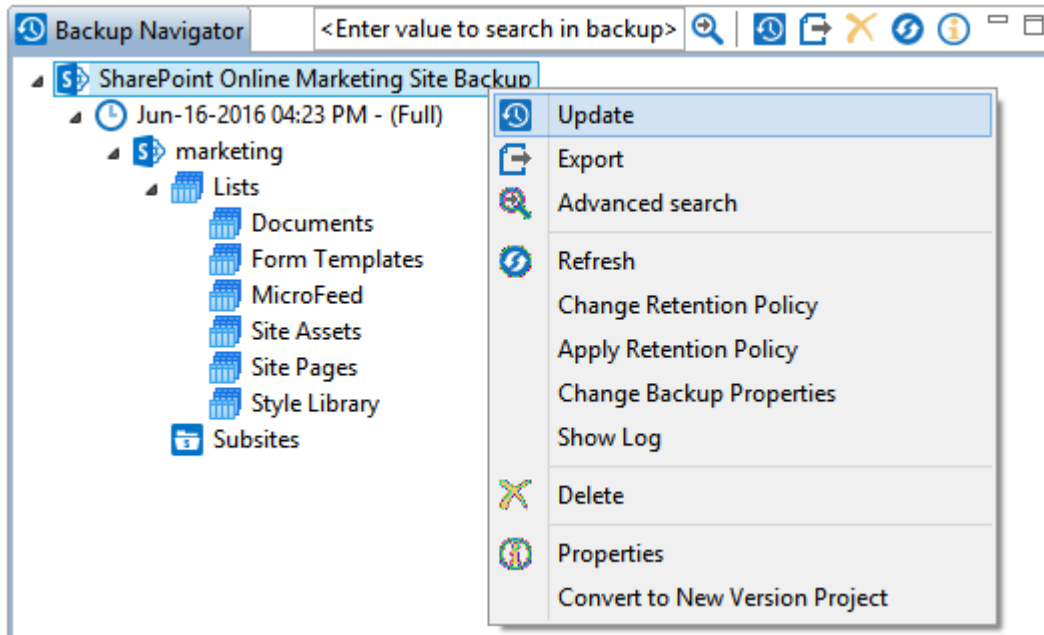


SharePoint Online Backup Project structure

Update an Existing SharePoint Online Backup

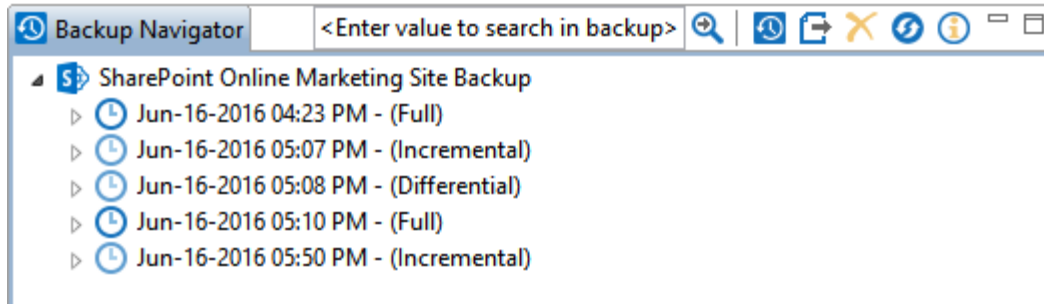
To create an update to an existing SharePoint Online backup project, please follow these steps.

1. Select your existing SharePoint Online backup project from the Backup Navigator, right click and choose Update or select the Update button located in the ribbon.



SharePoint Online Update Backup

2. On the Update Backup dialog, select from the available options for either a Full, Incremental or Differential update.
3. Click Finish to begin. If you have not already entered your credentials, you will be prompted to do so now. Make sure to provide a username and password that has at least Full Control to this site, Site Collection Administrator is preferred. Once the credentials have been verified, the update process will begin shortly.
4. When this update is complete, you will either receive a message in the user interface or configured, an email will be sent to let you know the backup is complete. Your update will now appear in your Backup project as a new node that displays the time at which the update began as well as the type of update that was run.
5. Repeat this section if you wish to create additional backups of any type; full, incremental, differential. As more updates are completed, they will all appear in chronological order (oldest at the top) within the backup project.



SharePoint Online Backup Project with Updates

OneDrive for Business Backup

OneDrive for Business backup can contain a specific list of user's OneDrive for Business sites or it can include all currently provisioned (*at the time the backup operation begins*) OneDrive for Business sites. You will be required to provide Office 365 credentials that have the Global Administrator role.

New OneDrive for Business Backup

To create your first OneDrive for Business backup, please follow these steps.

1. Start the Essentials for Office 365 solution and accept and install any software updates that are available. Running the most recent version is ideal since we do release new features and optimizations to the backup software on a regular basis.
2. Either choose the Backup option on the left side of the Welcome Page and click on the Backup tab above the application's ribbon.
3. Your first decision, do you want to create a backup that will be stored locally (local or network file storage) or one that will be stored in your Cloud provider (Azure or Amazon). Depending on your requirement, select the appropriate option in the Backup ribbon, either 'To Local Storage' or 'To Cloud Storage'.



Choose either To Local or To Cloud Storage located in the Backup ribbon

4. A new dialog box will now appear that will step you through the process of configuring your backup.
 - a. **Project Name** – Enter a unique name that will then appear in the Backup Navigator
 - b. **Service** – Choose 'OneDrive for Business'
 - c. **Login** – Enter the username of your Global Administrator account and click the Connect button. When prompted, enter the password for this account and click Connect to authenticate. After a few seconds, a green checkbox will appear indicating that the connection was successful and you may proceed.

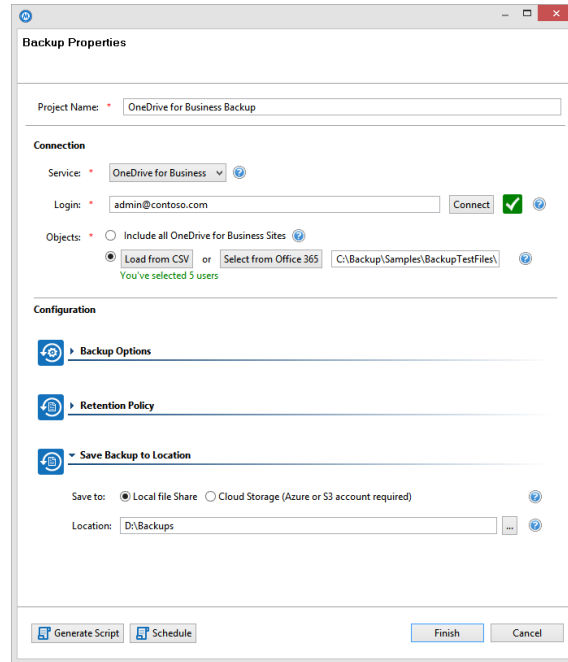
Login: *



Global Admin Login successfully connected

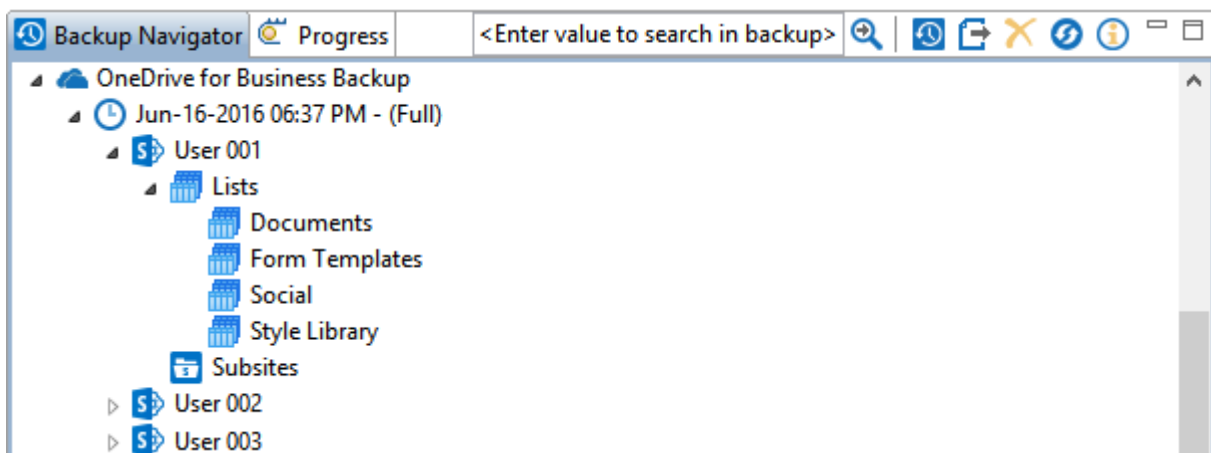
- d. **Objects** – Select either to Include All OneDrive for Business Sites (all provisioned sites at the time the backup begins) or choose to select only specific users to include using either the Load from CSV or Select from Office 365 options.
 - i. **Load from CSV** – Load a pre-created CSV file that contains a single of Office 365 user accounts that you want to include in this OneDrive for Business backup
 - ii. **Select from Office 365** – A dialog will appear that displays all currently licensed OneDrive for Business users in your tenant. Check the box next to each user you want to include and then save the file to specific location on this host computer.
 - e. **Configuration: Backup Options** – Choose the options that you wish to configure for this backup project. For details about the options, please refer to the User Manual located in the Help tab. Please note that the more options selected, the more processing, storage and time that will be required to complete the backup operation.
 - f. **Configuration: Retention Policy** – Choose to specify a retention policy in days for the Full or Update backups. If you do not want to apply a retention policy, leave both options unchecked.
 - g. **Configuration: Save to Location** – This determines where the backup project will be stored. If you chose Local in step 1 that will be the default configuration or if you chose Cloud in step 1 then that will be the default, however you may change the selection now if you wish. For the Location field, click the ellipsis (...) button to the right to select the actual path that will be used for storage.
5. Once you are satisfied with your configuration, click Finish to begin. If you have not already entered your credentials, you will be prompted to do so now. Make sure to provide a username and password that has the Global Administrator role to your Office 365 tenant. Once the credentials have been verified, the backup process will begin shortly.

Note: This first backup will be a Full, so depending on the amount of content contained and the number of objects configured, this initial operation may take hours, days or even weeks to complete and can consume many GBs or more of storage space.



OneDrive for Business backup configuration

6. When the first backup is complete, you will either receive a message in the user interface or if configured, an email will be sent to let you know the backup is complete. Your project will now appear in the backup navigator. The structure in the Backup Navigator will be in the following format:
- Backup Project Name
 - Timestamp of the backup operation (backup type: Full, Incremental, Differential)
 - OneDrive for Business Site Name
 - Lists
 - {Lists and Libraries that were backed up}
 - Subsites (*not supported for OneDrive for Business backups*)

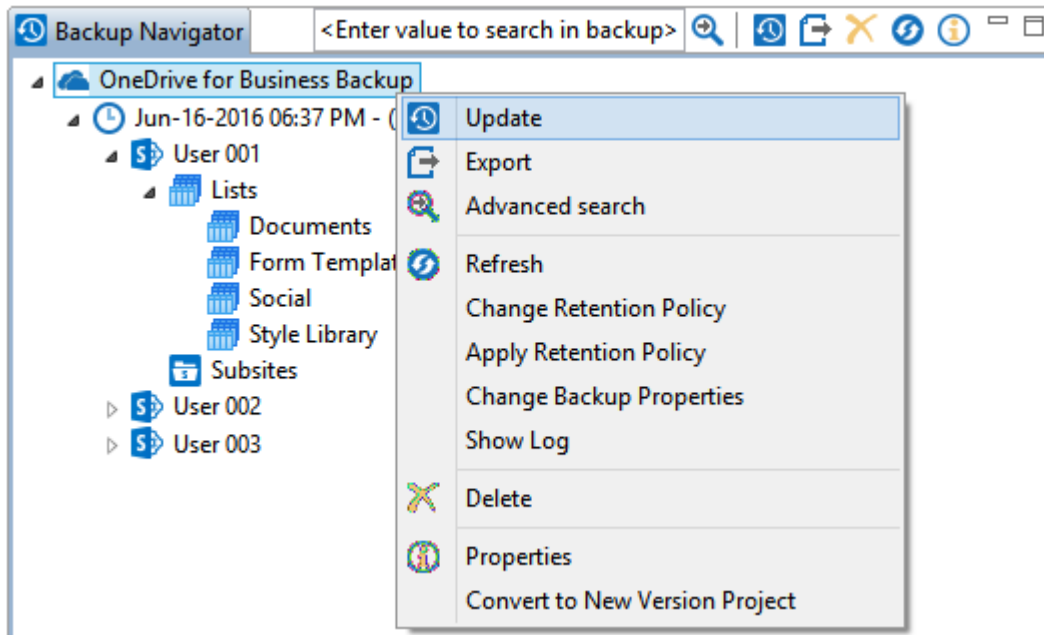


OneDrive for Business Backup Project structure

Update an Existing OneDrive for Business Backup

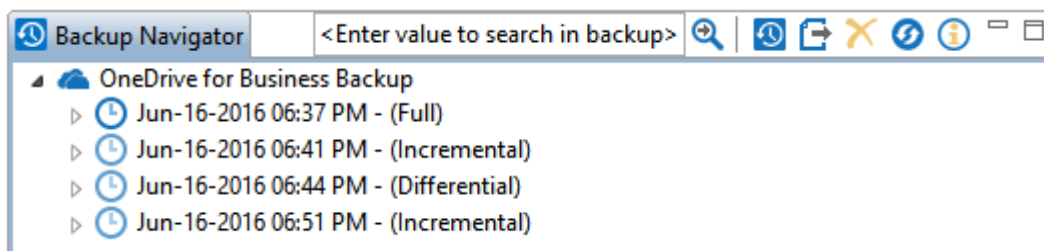
To create an update to an existing OneDrive for Business backup project, please follow these steps.

1. Select your existing OneDrive for Business backup project from the Backup Navigator, right click and choose Update or select the Update button located in the ribbon.



OneDrive for Business Update Backup

2. On the Update Backup dialog, select from the available options for either a Full, Incremental or Differential update.
3. Click Finish to begin. If you have not already entered your credentials, you will be prompted to do so now. Make sure to provide a username and password that has the Global Administrator role in your Office 365 tenant. Once the credentials have been verified, the update process will begin shortly.
4. When this update is complete, you will either receive a message in the user interface or if configured, an email will be sent to let you know the backup is complete. Your update will now appear in your Backup project as a new node that displays the time at which the update began as well as the type of update that was run.
5. Repeat this section if you wish to create additional backups of any type; full, incremental, differential. As more updates are completed, they will all appear in chronological order (oldest at the top) within the backup project.



OneDrive for Business Backup Project with Updates

Office 365 Mailbox Backup

Office 365 (Exchange Online) Mailbox backup can contain a specific list of user's mailboxes or it can include all currently provisioned (*at the time the backup operation begins*) mailboxes. You will be required to provide Office 365 credentials that have the Global Administrator role and has an Exchange Online license assigned.

New Office 365 Mailbox Backup

To create your first Office 365 Mailbox backup, please follow these steps.

1. Start the Essentials for Office 365 solution and accept and install any software updates that are available. Running the most recent version is ideal since we do release new features and optimizations to the backup software on a regular basis.
2. Either choose the Backup option on the left side of the Welcome Page and click on the Backup tab above the application's ribbon.
3. Your first decision, do you want to create a backup that will be stored locally (local or network file storage) or one that will be stored in your Cloud provider (Azure or Amazon). Depending on your requirement, select the appropriate option in the Backup ribbon, either 'To Local Storage' or 'To Cloud Storage'.



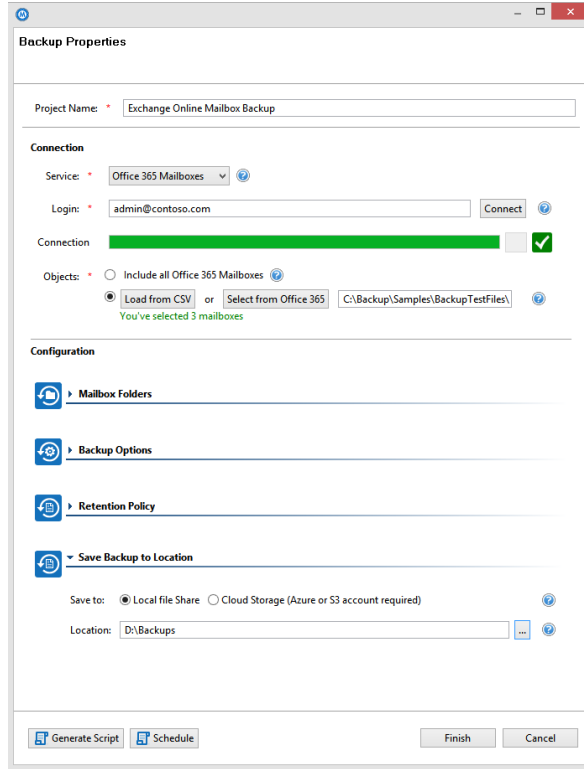
Choose either To Local or To Cloud Storage located in the Backup ribbon

4. A new dialog box will now appear that will step you through the process of configuring your backup.
 - a. **Project Name** – Enter a unique name that will then appear in the Backup Navigator
 - b. **Service** – Choose 'Office 365 Mailboxes'
 - c. **Login** – Enter the username of your Global Administrator account and click the Connect button. When prompted, enter the password for this account and click Connect to authenticate. After a few seconds, a green checkbox will appear indicating that the connection was successful and you may proceed.

Login: *

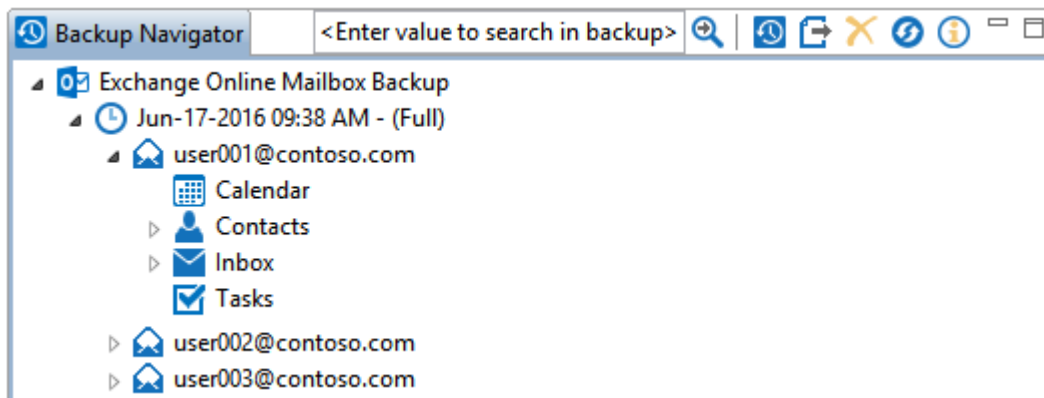
Global Admin Login successfully connected

- d. **Objects** – Select either to Include All Office 365 Mailboxes (all provisioned sites at the time the backup begins) or choose to select only specific users to include using either the Load from CSV or Select from Office 365 options.
 - i. **Load from CSV** – Load a pre-created CSV file that contains a single of Office 365 user accounts that you want to include in this Office 365 Mailboxes backup



Office 365 Mailboxes backup configuration

6. When the first backup is complete, you will either receive a message in the user interface or if configured, an email will be sent to let you know the backup is complete. Your project will now appear in the backup navigator. The structure in the Backup Navigator will be in the following format:
 - o Backup Project Name
 - Timestamp of the backup operation (backup type: Full, Incremental, Differential)
 - Primary Email Address of the Mailbox
 - o Display of Mailbox folders that were backed up

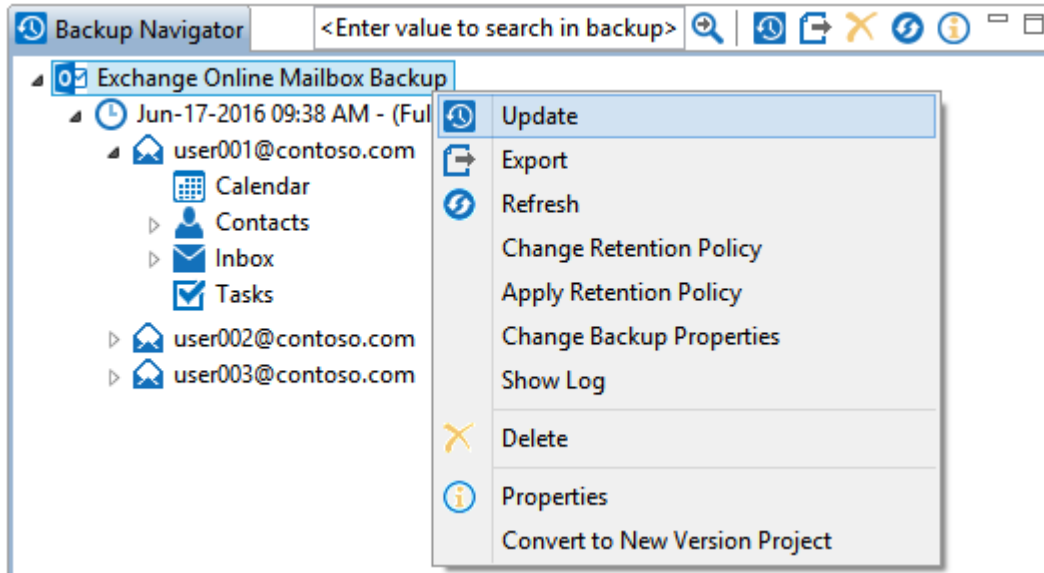


Office 365 Mailboxes Backup Project structure

Update an Existing Office 365 Mailbox Backup

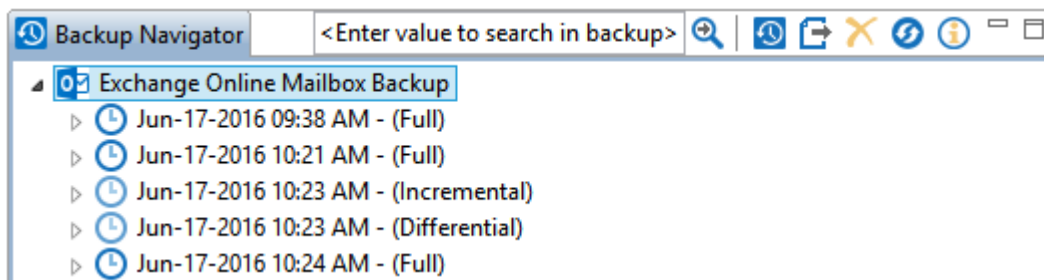
To create an update to an existing Office 365 Mailbox backup project, please follow these steps.

1. Select your existing Office 365 Mailbox backup project from the Backup Navigator, right click and choose Update or select the Update button located in the ribbon.



Office 365 Mailbox Update Backup

2. On the Update Backup dialog, select from the available options for either a Full, Incremental or Differential update.
3. Click Finish to begin. If you have not already entered your credentials, you will be prompted to do so now. Make sure to provide a username and password that has the Global Administrator role in your Office 365 tenant and has an Exchange Online license assigned to it. Once the credentials have been verified, the update process will begin shortly.
4. When this update is complete, you will either receive a message in the user interface or if configured, an email will be sent to let you know the backup is complete. Your update will now appear in your Backup project as a new node that displays the time at which the update began as well as the type of update that was run.
5. Repeat this section if you wish to create additional backups of any type; full, incremental, differential. As more updates are completed, they will all appear in chronological order (oldest at the top) within the backup project.



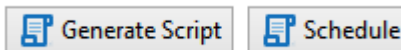
Office 365 Mailboxes Backup Project with Updates

Scheduling Backup Operations

Besides the initial "New" backup, most users prefer to schedule their update operations to take place during a specific day or time. Essentials for Office 365 uses an integration with Windows Task Scheduler to create and execute the scheduled operations, so let's take a look at how to create these tasks.

Note: The update process is similar for each service, so the sake of brevity the following section will use a SharePoint Online backup project as the sole example.

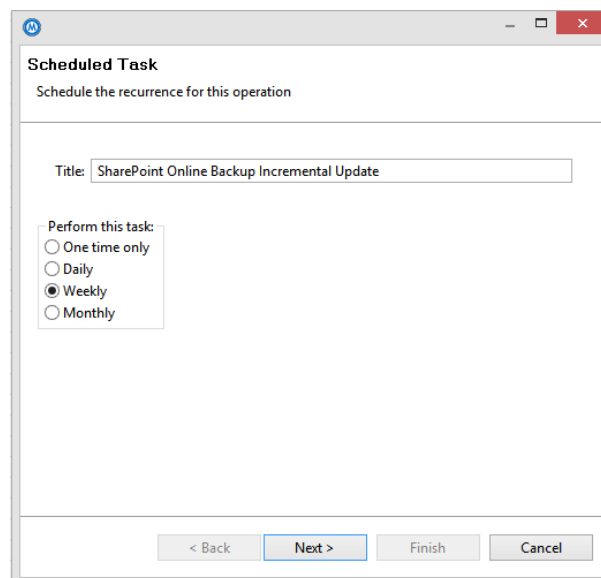
The software offers an option to both "Generate Script" as well as "Schedule" on the bottom left of the Update Backup dialog. In this example, we will be using this Schedule button.



Script and Schedule buttons

To schedule a backup update, please perform the following steps:

1. Select your existing backup project from the Backup Navigator, right click and choose Update or select the Update button in the Backup ribbon.
2. On the Update Backup dialog, select from the available options for either a Full, Incremental or Differential update. For this example, we will choose the Incremental option.
3. Click the "Schedule" button on the bottom left to schedule your Incremental Update for this backup project.
4. A Schedule Task dialog will appear. Please enter a Title that you wish to call this scheduled task and select the recurrence rate for which it should run. Click Next to continue.



Scheduled Task Recurrence

5. On the next screen, select the day and time that you wish to have the Scheduled Task begin. The following screenshot shows the configuration options for a "Weekly" recurrence, however the available options will differ depending on your selected recurrence. Click Next to continue.

Configuration a weekly day and time scheduled start

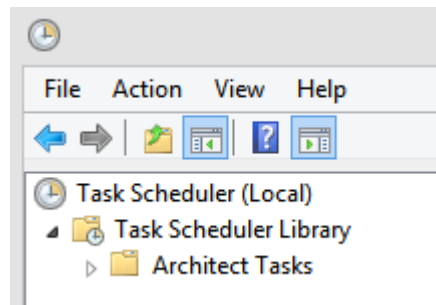
6. The next page is a confirmation screen for the soon to be created scheduled update task. If you are satisfied with the configuration, click Finish to continue. If you would like to make a change, click the Back button now.
7. When you click Finish, a login prompt will appear. On this page you will be given the chance to save a local Windows user account with the scheduled task or not to include this user. We have found that the majority of users need to save an account with their task so that is the recommendation.
 - a. If you choose to store the Windows user account, enter the Windows username that was used to activate the Essentials for Office 365 solution in the typical domain\user format (i.e. contoso\admin). Then enter this account's Windows password into the second field and again in the third to confirm. Click OK to continue.
 - b. If you choose to not store the Windows user account, then select the No option and click OK to continue.

Note: When storing the Windows account, please be absolutely sure that the username and password being entered is correct. The software does not validate the user nor password, so if a mistake is made in this step the task may not appear in Windows Task Scheduler. If that happens, you will need to begin this process again.

8. If you have not already, you may receive another prompt to login credentials. The credentials being requested here are for SharePoint Online and need to be stored with the scheduled task. Please enter a username and password for has at least Full Owner (Site Collection Administrator recommended) and click OK to validate. If the login prompt disappears, then the credentials are validate. If you receive an error message, please double check your credentials and try again.

9. **Note:** When storing an Office 365 or Windows User Account with the task please remember that if the password expires or changes, then the scheduled tasks will fail to execute successfully. Therefore it is recommended to use an account that has the password set to Never Expire.

10. You should now receive a message indicating that the task was created successfully and Windows Task Scheduler should automatically open. If Windows Task Scheduler does not open, please use the Windows search function to locate and open it manually.
11. Essentials for Office 365 stores all of its scheduled tasks in the "Architect Tasks" folder located in the Windows Task Scheduler left navigator (Task Scheduler (Local) > Task Scheduler Library > Architect Tasks). Click on this Architect Tasks folder and you should now see the scheduled task that we just created in the center view. You may now select the task and make any additional changes you wish using the native controls of Windows Task Scheduler.



Essentials for Office 365 scheduled tasks location in Windows Task Scheduler

12. You may now close Windows Task Scheduler and Essentials for Office 365 or if you wish to create additional scheduled tasks, please repeat this process again.

Frequently Asked Questions and Scenarios

Here is a collection of questions and scenarios that users have sent us.

Q: Windows Task Scheduler showed a status of "Running" and then quickly changed back to "Ready". Is my backup done and if not, how can I tell if the backup is still running?

A: The task in Windows Task Scheduler is designed to run for just a few seconds as what is actually happening is that it is only starting the operation (which takes just a few seconds). Once the operation has started then the task has been completed, but that does not mean the backup is complete or that it stopped.

Scheduled or scripted operations are designed to run in the background, so there are no UI or visual indicators as to its progress. If you would prefer UI based updates, then you can run the backups manually using the Backup "Update" option.

To determine if a scheduled backup is still running, look in the following places:

- Windows Task Manager – If you open Windows Task Manager and see one or MetaVis.exe processes running, then it is still in progress.

- Check your email – If you configured the Send Notification option, then you will receive an email when the operation is complete.
- Check your backup storage location – If new files or directories are being created, then the backup is still running.
- Check the Essential's log – Essential's logs for scheduled tasks are stored in the below default location. If you navigate there and see that the log is increasing in size or has been modified recently, then the operation is still in progress.

Q: My backup has been running for a long time, how much longer will it take?

A: This is a difficult question to answer because there are many variables involved with a backup operation and Office 365. A couple of points to be conscious of are that the more content (SharePoint sites, OneDrive for Business users and Office 365 Mailboxes) that is included the longer the operation will take to process. We are basically downloading a large amount of content from Office 365 through your network connection and then writing this data to a disk, this can be a somewhat time consuming operation. You also have to consider the options that were configured (All OneDrive sites, all versions, include permissions) that can add to the total time as well as the very real possibility of throttling. If you have not already, we would encourage you to review our Essentials for Office 365 Performance Optimization Guide for tips to maximize performance.

Q: Why is my scheduled task failing to start?

A: Your scheduled task may not start because you did not save Windows credentials with the task or maybe because you did save Windows credentials with the task. I know this sounds confusing but there have been situations where some computer require the credentials to run while others require that they don't have them to run. So if your task is failing to start, try adding or removing credentials which can be done in Windows Task Scheduler by editing the 'General' Properties of the task and changing the run using this user account value or enabling/disabling the Do not store password option.

While you are editing the task, you may also want to enable the "Run with highest privileges" option as well. This has proven to help in some environments as well.

Q: I created a scheduled task but it did not appear in Windows Task Scheduler, why?

A: The most likely cause is because when you created the scheduled task in Essentials for Office 365, you chose the option to store a Windows username and password in the task and the username or password you entered was either incorrect or not yours. If it was incorrect, it will not appear and if it was not you, then you may not have the appropriate permissions to view it. Either case, this task will not run and should be recreated either by not storing the credentials or using an appropriate Windows user account when prompted.

Q: My backup completed, but there is content missing. Where is it?

A: The first place to look is the Essential's log file. You can access the log files through the software by going to the Backup tab and clicking the Logs button in the ribbon. From the log viewer dialog, click History and then locate and double click this particular backup operation. Scroll through or select Failed from the dropdown to locate any potential failures that may have occurred.

Failures may be related to network connectivity, running out of system resources (memory), throttling or a host of other issues. If the errors are infrequent, you may consider waiting for the next scheduled backup (full or differential) to run or if they are severe, you may wish to manually run another update at this time.

Q: Windows Task Scheduler indicates that the task completed, however I do not see anything being backed up. What happened?

A: If the task successfully starts, however the backup itself does not then the most common cause is an authentication issue and the first place to check is Office 365. The task stores both a username and password, so if you recently changed your password or if it has expired, then you will need to update it appropriately in the task.

You can also check to make sure the task is configured to run as the user who activated the Essential's software. Since the license activation is associated to a specific user, if the task tries to run as someone else then it will fail to execute immediately.

Same goes for the storage location. If you are storing in the cloud and the storage credentials change then the task will need to be updated. If you are storing locally, perhaps to a network location, and your Windows credentials or permissions are changed, then the software can access the backup storage location and will therefore fail to run.

If you are unsure, be sure to check the Essential's log files located in Backup > Logs > History or directly from the computer at C:\Users\[userProfile]\Metavis\.metadata\cmdLog.

Q: In the Backup Navigator, there appears to be missing snapshots. What should I do now?

A: A missing backup or snapshot in your project can be an indication that the task did not execute at all. First you will want to check the task in Windows Task Scheduler to confirm that it was indeed scheduled for this day and time. While in Task Scheduler, select the task and click on the History tab and check the entries for any specific error message. While this message can sometimes be difficult to understand, they will at least let you know if it attempted to run at that scheduled time. If the task is configured to run only when the user is logged on, do you recall if it was logged off at the scheduled start time?

If nothing conclusive yet, you can check the Essential's log files located in your user workspace which by default is C:\Users\[UserName]\Metavis\.metadata\cmdLog. In this directory, look for the log file that corresponds to the scheduled start time of your task. The file name will be in the format TaskName.YYYYMMDDHHMMSS.xml. If the file is not there, then the operation most likely never started. For this situation, select this task from within Windows Task Scheduler, right click and choose Run.

Next Steps

Now that you have read through the documentation and better understand the basic configuration and planning involved with the backup process, you should be ready to give it a try in your environment.

Please review the following helpful links to better understand the usage of the software:

User Manual: <http://manual.metalogix.com/>

FAQs and How To Guides: <http://mv.metalogix.com/support>

Conclusion

This guide is designed to provide you with a basic understanding of how the backup process is configured and run through the Essentials for Office 365 solution. We encourage you to use this as a quick start guide to configuring and creating your first backup project. If you have any questions or feedback, please reach out to support using the button available in the software's Help ribbon.