Veritas SaaS Backup for Salesforce

Documentation version: 2.0

Legal Notice

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Technical Support

Technical Support maintains support centers globally. Technical Support's primary role is to respond to specific queries about product features and functionality. The Technical Support group also creates content for our online Knowledge Base. The Technical Support group works collaboratively with the other functional areas within the company to answer your questions in a timely fashion.

Our support offerings include the following:

- A range of support options that give you the flexibility to select the right amount of service for any size organization
- Telephone and/or Web-based support that provides rapid response and up-to-the-minute information
- Upgrade assurance that delivers software upgrades
- Global support purchased on a regional business hours or 24 hours a day, 7 days a week basis
- Premium service offerings that include Account Management Services

For information about our support offerings, you can visit our website at the following URL:

www.veritas.com/support

All support services will be delivered in accordance with your support agreement and the then-current enterprise technical support policy.

Contacting Technical Support

Customers with a current support agreement may access Technical Support information at the following URL:

www.veritas.com/support

Before contacting Technical Support, make sure you have satisfied the system requirements that are listed in your product documentation. Also, you should be at the computer on which the problem occurred, in case it is necessary to replicate the problem.

When you contact Technical Support, please have the following information available:

- Product release level
- Hardware information
- Available memory, disk space, and NIC information

- Operating system
- Version and patch level
- Network topology
- Router, gateway, and IP address information
- Problem description:
  - Error messages and log files
  - Troubleshooting that was performed before contacting Technical Support
  - Recent software configuration changes and network changes

Licensing and registration

If your product requires registration or a license key, access our technical support Web page at the following URL:

www.veritas.com/support

Customer service

Customer service information is available at the following URL:

www.veritas.com/support

Customer Service is available to assist with non-technical questions, such as the following types of issues:

- Questions regarding product licensing or serialization
- Product registration updates, such as address or name changes
- General product information (features, language availability, local dealers)
- Latest information about product updates and upgrades
- Information about upgrade assurance and support contracts
- Advice about technical support options
- Nontechnical presales questions
- Issues that are related to CD-ROMs, DVDs, or manuals

Support agreement resources

If you want to contact us regarding an existing support agreement, please contact the support agreement administration team for your region as follows:

Worldwide (except Japan)	CustomerCare@veritas.com
Japan	CustomerCare_Japan@veritas.com

Contents

Chapter 1

Getting to know Veritas SaaS Backup

This chapter includes the following topics:

Introducing Veritas SaaS Backup for Salesforce

Veritas SaaS Backup for Salesforce is a cloud-to-cloud backup service that enables you to back up, download, share, and restore your Salesforce data.

You can back up the following types of Salesforce data:

- Accounts
- Contacts
- Leads
- Opportunities
- Activities - Events and tasks
- Notes
- Cases
- Custom fields on all of the above items

Access to Salesforce APIs is required to use Veritas SaaS Backup with Salesforce. Note that if you use other applications that require API requests with Salesforce, the performance of Veritas SaaS Backup may be affected. Salesforce limits the number of API requests that can be sent every day. If you reach the request limit, Salesforce stops responding for the remainder of the day.

The following Salesforce editions are supported:

- Enterprise Edition
- Unlimited Edition
- Developer Edition
- Performance Edition

Accessing Veritas SaaS Backup

Use the following URL to access Veritas SaaS Backup:

https://saasbackup.veritas.com/

What's new in version 2.0

The following new features are available:

- Audit logs - User administrators can view audit logs that show the actions for all accounts.
  See "Viewing audit logs" on page 20.
- Support for communication sites - You can access Office 365 communication sites. You can view backed up documents folders, custom document libraries, and sub-sites. Communication sites can be shared, downloaded, restored, and viewed.
- New user roles - User administrator, full support, limited support, and audit roles can be added.
  See "User roles and permissions" on page 11.
- Ability to search for users and groups that you want to include in a backup.

Chapter 2

Setting up Veritas SaaS Backup

This chapter includes the following topics:

Adding a cloud connector for Salesforce

A cloud connector represents the backup of a cloud service. To begin backing up a cloud service, you must create a cloud connector service by choosing the cloud service that you want to back up, and then entering your credentials for that service.

Note: Before you add a cloud connector, make sure that you have access to Salesforce API and a user account with permissions to access all of the data on your Salesforce agent.

The supported Salesforce editions are Enterprise, Unlimited, Developer, and Performance editions.

To add a cloud connector for Salesforce

1. On the **Connectors** screen, click **Add**, and then select **G Suite**.
2. In **Enter your SalesForce** device name, type the name that identifies what you are backing up.
3. Click **Sign in with Salesforce account**.
4. Enter your Salesforce credentials.
5. When you are prompted for permission to access files, review the list of permissions, and then click **Allow**.

Note: The first backup starts automatically after you set up the cloud device for Salesforce. After the initial backup, a backup runs automatically several times a day.

If you use other applications that require several API requests to run with Salesforce, the backup performance may be affected. Salesforce limits the number of API requests per day, so if the limit it reached, Salesforce stops responding for the remainder of that day.

Resetting your password

If you forgot your password, you can request a new one.

To reset your password

1. From the logon screen, click **Forgot your password**.
2. Type your email address, and then click **Reset**.
3. When you receive the password reset email from Veritas, open the email and click the **Reset password** link.
4. Enter the requested information to change your password.

Changing your email and other settings

You can change your email address, name, preferred language, password, and phone number

To change your email and other settings

1. On the **Connectors** screen, click the person icon at the top right of the screen.
2. Click **Settings**.

3 Click the pencil icon next to the item that you want to change.

4 Change the information, and then click **Save**.

User roles and permissions

The first user who logs on to Veritas SaaS Backup becomes a User administrator by default. The User administrator can add, edit, and delete other user roles. The initial User administrator cannot be edited or deleted. Any additional user administrators can be edited or deleted.

The following user roles are available.

Table 2-1 User roles and permissions

Role type	Available permissions
User administrator	▪ Create a connector ▪ Delete a connector ▪ Configure a connector ▪ Preview files ▪ Download files ▪ Share files ▪ Import skip ▪ Import overwrite ▪ Import rename ▪ View audit log
Full support	▪ Preview files ▪ Download files ▪ Share files ▪ Import skip ▪ Import overwrite ▪ Import rename
Limited support	▪ Import skip ▪ Import rename
Audit	View audit logs

See “Adding users” on page 12.

Adding users

A User administrator can add additional user roles.

To add users

1. On the **Connectors** page, select the menu icon at the top right.
2. Click **Users** > **Create user**.
3. In **Role**, select the type of user that you want to add.

   See "User roles and permissions" on page 11.
4. In **Name**, type a name for this user.
5. In **Login**, enter the email address for this user.
6. In **Password** and **Confirm password**, enter password information.
7. In **Expire time**, select the amount of time to keep this user.
8. Click **Create user**.
9. Click **Done**.

Editing a user

A User administrator can edit user roles.

To edit a user

1. On the **Connectors** page, select the menu icon at the top right.
2. Click the gear icon next to the user that you want to edit.
3. Edit the user information.
4. Click **Update user**.

Deleting a user

A User administrator can delete user roles.

To delete a user

1. On the **Connectors** page, select the menu icon at the top right.
2. Click the trashcan icon next to the user that you want to delete.
3. Click **Yes** to confirm that you want to delete this user.
4. Click **Done**.

Restoring data

This chapter includes the following topics:

- Restoring an individual file or folder
- Restoring from a history snapshot

Restoring an individual file or folder

You can restore single files and folders while you are browsing in the user interface. The file or folder that you select is restored to its original location, overwriting the existing file or folder.

The restore time varies depending on the size of the data that is selected to be restored. For fast access to data, download the data instead.

See "Downloading a file or a folder" on page 15.

To restore a single file or folder to its original location

1 On the **Connectors** screen, select the service you want to restore.

2 Navigate to the file or folder that you want to restore.

3 Click the ellipses (...) option to the right of the file or folder that you want to restore, and then click **Restore**.

4 Click **Yes** to confirm that you want to restore the selected item back to its original location.

The restored file or folder does not appear in the Veritas SaaS Backup user interface until a new backup runs. However, the restored file or folder is available in Office 365 immediately after it is restored.

Restoring from a history snapshot

Follow these steps to restore a file to its original location. Note that any files that have the same name in the same location are overwritten.

To restore from a history snapshot

1. On the **Connectors** screen, browse to the items from which you want to restore.
2. Select the down arrow on the computer screen icon to the left of the connector name, and then click **History Snapshots**.
3. Select the point in time from which you want to restore.
4. Locate the file or folder that you want to restore.
5. Select the snapshot that you want to restore.

Downloading files and folders

This chapter includes the following topics:

- Downloading a file or a folder

Downloading a file or a folder

You can download a file or a folder from any cloud connector that you have backed up with Veritas SaaS Backup, as long as you have Internet access.

To download a file or a folder

1. On the **Connectors** screen, select the cloud service account from which you want to download a file or a folder.
2. Navigate to the file or the folder that you want to download, and then click the **Download** icon to the right of the file or folder name.

Importing data

This chapter includes the following topics:

- Importing data from one location to another location

Importing data from one location to another location

Importing data takes the data from one location and copies it to another location. For example, you can copy data from one account to another account, or from one account at a specific point in time to that same account.

Note: The Import feature is available only for account-related data. Sites and Groups cannot be imported.

To import data from one location to another location

1. On the **Connector** screen, select the cloud service from which you want to import data, and then click the gear icon.
2. Click **Import data**.
3. Make the following selections:

Please select the account you'd like to import data from	Select the account from which you want to import data.
Select snapshot	Select the snapshot that you want to import to another location. A snapshot represents a point in time when the backup ran.

In case of duplicate files	Select one of the following options to determine how to handle the files that already exist in the location to which you are importing data: ■ Rename duplicate files - Select this option to rename any duplicate files. For example, a duplicate of filename.png is renamed to filename(1).png. ■ Overwrite duplicate files -Select this option if you want to overwrite the existing files with the new files. Note that you will lose the latest changes to these files if duplicates are restored. ■ Skip duplicate files - Select this option to skip any duplicate files. This option is useful when you are trying to restore data back to a location where only a few files are required.

4. Select the types of data that you want to import.
5. Under **Import data from**, select the account from which you want to import the data.
6. Under **Import data to**, select the account to which you want to import the data.
7. (Optional) Click **Add** to import data to an additional account.
8. Click **Import**.

Chapter 6

Sharing files and folders

This chapter includes the following topics:

- Sharing files and folders with a public link
- Generating a new URL for a public link

Sharing files and folders with a public link

Using a public link, you can share files and folders with anyone. Public links always show the latest available data. Creating a public link from an old snapshot gives you the option to lock the public link to that specific snapshot.

To share files and folders with a public link

1. On the **Connectors** screen, navigate to the file or folder that you want to share.
2. Click the **Share** icon to the right of the file or folder name.
3. (Optional) To set an expiration date for the link, select **Time limit public link**, and then select the expiration time.
4. (Optional) To password-protect the public link, select **Password protect public link**, and then enter a password.
5. Click **Share**.
6. Copy the link that appears and send it to the people with which you want to share it.

Generating a new URL for a public link

Do the following to create a new URL for a public link.

To generate a new URL for a public link

1. On the **Connectors** screen, select the menu icon at the top right of the screen, and then select **Links**.
2. Select the link, and then click the **Share** icon.

Chapter 7

Audit logs

This chapter includes the following topics:

- Viewing audit logs

Viewing audit logs

If you are logged on as the Cloud administrator, you can see the audit logs for users.

The audit log lists each time a user:

- Changed a password.
- Logged on or an attempted logon failed.
- Browsed folders.
- Downloaded files.
- Previewed a file.
- Downloaded a whole folder as a .zip file.
- Created or deleted a cloud connector.
- Performed a general restore.
- Imported data.
- Performed a single file or folder restore.
- Previewed a file from EWS, OneDrive, Groups, or Sites (Office 365)
- Created or shared a link.
- Removed a link.
- Set a password or an expiration date for a link.

- Opened or downloaded files from a link.

To view audit logs

1. On the **Connectors** screen, select the menu icon, and then select **Audit**.
2. In **User**, select the user whose logs you want to view, and then click **Refresh**.

   The initial list shows logs for the last 12 hours. If the user that you selected does not have any activity for the last 12 hours, the screen will be blank. Click **Show more logs** to see logs in 12-hour increments.