UniView SaaS Backup Module

Quick Start Admin Guide

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Welcome

About this guide

Thank you for selecting UniView SaaS Backup powered by Spanning. Our mission is to ensure your customers' Microsoft 365, Google Workspace and Salesforce data is protected and always available for rapid restore to keep them up and running. We empower end users to correct their own mistakes, and give MSPs, application administrators, IT leadership and audit teams the confidence and proof that Microsoft 365, Google Workspace and Salesforce data is appropriately backed up, safe and ready for recovery.

Audience

This guide is intended for partners who use UniView to manage their customers' backups.

What's in this guide

This guide is organized to help you find the information you need to manage your SaaS Backups for Microsoft 365, Google Workspace and Salesforce through the SaaS Backup module within UniView. For details on how to administer Spanning Backup for Microsoft 365, see

<u>https://spanning.com/downloads/SBO365-admin-guide.pdf</u>. For details on administering Spanning Backup for Google Workspace, see <u>https://spanning.com/downloads/SBGS-admin-guide.pdf</u>. For details on administering Spanning Backup for Salesforce, see <u>https://spanning.com/downloads/SBSF-admin-guide.pdf</u>.

Access Spanning SaaS Backup Module

Once you are logged into UniView, select "SaaS Backup" on the left navigation and you'll be taken to the UniView SaaS Backup Overview page.

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			UniView Spanning Backup Registered on 12/07/2021	Quick Start Guide Get all the information you need to get Spanning Backup set up for your customers. \rightarrow	
			Total Customers 5 Contracted Standard Linenses 210		
			Allocated Standard Licenses 56 Available Standard Licenses 154 Contracted Archived Licenses 30 Allocated Archived Licenses 30 Available Archived Licenses 30	Learn More Spanning Backup ensures that your customer's data is protected, available and → recoverable.	

Adding Customers

Customers and prospects can be added to your SaaS Backup module by installing Spanning Backup for Microsoft 365, Spanning Backup for Google Workspace or Spanning Backup for Salesforce using the custom link provided. Tenants who have never installed Spanning Backup will automatically start a 14day free trial. Existing Spanning Backup tenants will be associated with your UniView account and become visible in the module.

To add customers:

- 1. Click "Customers" in the left navigation.
- 2. If you don't yet have customers associated, you'll be taken to the page below.

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3. Click Add Customers and choose Microsoft 365, Google Workspace or Salesforce as the product.



4. Choose Copy Link to place your unique link and id on the clipboard.



- a. For Spanning Backup for Microsoft 365: Provide the custom link to your customer and have them install Spanning Backup for Microsoft 365 using a global admin account, or if you have access to a global admin account in your customer's tenant you can install on their behalf.
- b. For Spanning Backup for Google Workspace: Provide the custom link to your customer and have them install Spanning Backup for Google Workspace using a super admin account, or if you have access to a super admin account in your customer's tenant you can install on their behalf.
- c. For Spanning Backup for Salesforce: Provide the custom link to your customer and have them install Spanning Backup for Salesforce using a system admin account with API access enabled, or if you have access to system admin account in your customer's tenant you can install on their behalf.
- 5. Once the installation is complete, the customer will be displayed in the customer list screen on either the Microsoft 365 tab, the Google Workspace tab, or the Salesforce tab.

Adding Additional Customers

You can add additional customers at any time by selecting the "Add Customer" button and select the appropriate product.



Each product has a unique URL but uses the same unique code for your UniView instance.

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There are two options depending on your installation preference. **Install Now** will redirect you to the product portal and initiate the installation process. **Copy Link** will send a link to the clipboard for you to use in an in-private browser session or to send in an email to your customer.

Managing Customers

To view all customers associated to your account, click on the "Customers" tab in the left navigation window. Choose the tab for either Microsoft 365, Google Workspace or Salesforce. Each customer entry will include their tenant name, the number of paid licenses, the license coverage of their tenant, the expiration date of their trial or active subscription, and the status of the last backup.

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To view details about your customers' backup installation, click on a customer row and a details blade will expand with additional details about the tenant. The details blade contains the controls to change license allocation and the detailed 7-day history of backups for Teams, SharePoint, OneDrive, Mail, Calendar, and Contacts for Microsoft 365. For Google Workspace the status is for Sites, Drive, Mail, Calendar and Contacts For Salesforce the status for entire organization.

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Configure IT Complete Single Sign-On

Initially, access to the customer's Spanning Backup tenant is controlled with Microsoft Azure AD credentials for Microsoft 365, Google credentials for Google Workspace, and Salesforce credentials for Salesforce. To install and manage a Spanning Tenant, you must be a tenant administrator (Global Administrator for M365, super administrator for Google or system administrator for Salesforce) or Spanning Administrator. To manage a customer's Spanning Backup, click **Connect to Product** link from the customer list, or from within the details pane. Clicking the **Connect to Product** button will open a new browser tab and you will be prompted for Microsoft or Google Credentials. Once you authenticate to the tenant you have the option of configuring **Kaseya IT Complete Single Sign-On** for the tenant.

Configure IT Complete Single Sign-On in Spanning Backup for Microsoft 365

Once you have authenticated as a Global or Spanning Administrator to the Spanning Backup for

Microsoft 365 tenant, you can optionally configure IT Complete Single Sign-On. Navigate to **Settings | Services** and scroll to the section **Login with IT Complete**.

Enabling the feature will allow the UniView Administrator access to the Spanning tenant without providing Microsoft Credentials. The Administrator's UniView Username will be used for all audit activity. Once configured, an administrator can click Connect to Product and pass the UniView login to Spanning Backup for Microsoft 365 enabling you to manage your customers tenant without a separate login.

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		Login With IT Complete 3 Allow Kaseya IT Complete login for administrators • • • • •

Configure IT Complete Single Sign-On in Spanning Backup for Google Workspace

Once you have authenticated as a Super Admin or Spanning Administrator to the Spanning Backup for Google Workspace domain, you can optionally configure IT Complete Single Sign-On. Navigate to **Settings | Services** and scroll to the section **Login with IT Complete**.

Enabling the feature will allow the UniView Administrator access to the Spanning domain without providing Google Credentials. The Administrator's UniView Username will be used for all audit activity. Once configured, an administrator can click Connect to Product and pass the UniView login to Spanning Backup for Google Workspace enabling you to manage your customers domain without a separate login.

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Configure IT Complete Single Sign-On in Spanning Backup for Salesforce

Once you have authenticated as a Spanning Administrator to the Spanning Backup for Salesforce organization, you can optionally configure IT Complete Single Sign-On. Navigate to **Settings | Services** and scroll to the section **Login with IT Complete**.

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Enabling the feature will allow the UniView

Administrator access to the Spanning organization without providing Salesforce Credentials. The Administrator's UniView Username will be used for all audit activity. Once configured, an administrator can click Connect to Product and pass the UniView login to Spanning Backup for Salesforce enabling you to manage your customers domain without a separate login.

Spanning SaaS Backup Support

Important: For an in-depth guide on how Spanning Backup for Microsoft 365 works, please find the Administrator guide located <u>here</u>. For an in-depth guide on how Spanning Backup for Google Workspace works, please find the Administrator guide located <u>here</u>. For an in-depth guide on how Spanning Backup for Salesforce works, please find the Administrator guide located <u>here</u>.

Licensing

Purchase Licenses

In order to purchase licenses for Spanning Backup, please contact your Kaseya sales associate. Alternatively, you may request additional licenses from within the UniView module by:

- 1. Click the Purchase Licenses button.
- 2. Enter the number of licenses that you require.
- 3. Click Confirm to purchase the additional licenses.

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Allocate Licenses to Customers

License Allocation per Spanning tenant is controlled in the customer details pane. Select a customer and view the details pane.

You may allocate licenses to customers who are not in Trial status. Trial customers must be Upgraded to Paid before you can allocate licenses.

Adjust the license allocation in the selector. You may adjust the license allocation up as high as you like for customers that are adding users. (Without exceeding your total license allocation.) You may only decrease the allocation down to the number of Licenses in Use in a tenant.

As you make changes your updates are recorded at the bottom of the screen.

CHANGES (1) 658/660 16/20

Once you complete your changes click **Submit** to send the request to Kaseya. Your changes should become effective in 24 hours.

License pool is available for Spanning Backup for Microsoft 365 and Spanning Backup for Google Workspace. It is not available for Spanning Backup for Salesforce.

Spanning Cloud Apps LLC

EXTERNAL ID

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SPANNING REGION US - United States

EXPIRATION 07/31/2026

MICROSOFT USAGE REPORT	
💌 Mailbox Storage	13.3 Gb
👞 OneDrive Storage	3.2 Gb
SharePoint Storage	5.8 Gb
SPANNING USAGE REPORT	
Total Protected	111.2 Gb
E Total Stored	85.5 Gb
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LICENSE COVERAGE 10% 85% 0509 50% **Total Users** 20 Standard Total Tenant Licenses 210 Licenses In Use 17 Licenses Available 193 Add/Remove Licenses New Total 210 Archived **Total Tenant Licenses** 10 Licenses In Use 2 Licenses Available 8 Add/Remove Licenses New Total 10 n 20

Trial Conversion

You may now request the conversion of a customer trial to a paid subscription in the Customer detail pane.

- 1. Select a Customer that is currently in Trial status.
- 2. On the Customer details pane next to the Trial indicator choose **Upgrade**.
- 3. Adjust the license allocation as needed.
- 4. Click Submit.

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Enable SharePoint Backups

SharePoint backup can be enabled by selecting Enable in the SharePoint Backup Section for Microsoft 365 customers.

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Helpful Resources

Knowledge Base

Search through articles in the Spanning Knowledge Base at <u>https://helpdesk.kaseya.com</u> to find answers to the most common user questions for Spanning Backup for Microsoft 365, Spanning Backup for Google Workspace, Spanning Backup for Salesforce.

Email Support

If you can't find the answer to your question or need further help, please don't hesitate to contact us via email at <u>kaseyasupport@spanning.com</u>.

Privacy

Spanning takes privacy seriously. Read our Privacy Policy at <u>https://spanning.com/privacy-statement/</u>.

Security

Spanning Backup employs multiple layers of operation and physical security to ensure the integrity and safety of your data. Read how we protect your data at <u>https://spanning.com/data-protection-security/</u>.

About Spanning

Spanning Cloud Apps, a Kaseya Company, is the leading provider of backup and recovery for SaaS applications, protecting thousands of organizations from data loss due to user error, malicious activity and more. We are the only global provider of powerful, enterprise-class data protection for Microsoft Office 365, Google Workspace, and Salesforce. With data centers located in North America, the EU, Australia, Canada and the UK Spanning is the most trusted cloud-to-cloud backup provider with millions of users around the world.