# Acronis

Revision: 25.08.2017

# Acronis Backup Cloud plugin for ConnectWise Automate

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# 1   Introduction

This document describes how to install and use the Acronis Backup Cloud plugin for ConnectWise Automate. The integration with Acronis Backup Cloud enables IT service providers to easily back up any and all endpoints directly from the ConnectWise Automate interface without going to the Acronis Backup Cloud web interface.

Once the plugin is installed and configured, the data protection properties are automatically available for all servers and workstations in any location.

The service providers can:

- Remotely install, update, and uninstall the backup agent on protected computers
- Easily apply and revoke the pre-defined backup plan at the client, location, or computer level
- Monitor backup status for errors and warnings
- Leverage the native ConnectWise Automate reporting, ticketing and alerting functionality for handling backup events
- Provision new Acronis Backup Cloud customers

The service providers can go to the Acronis Backup Cloud web interface if they want to configure unique backup settings. The backup plans created in the Acronis Backup Cloud web interface are then synchronized and available for further use in the ConnectWise Automate interface.

Recovery is performed exclusively via the Acronis Backup Cloud web interface.

**Terminology conventions**

We will refer to the Acronis Backup Cloud plugin as "Acronis plugin" throughout this document.

We will refer to the Acronis Backup Cloud web interface as "backup console" throughout this document.


# 2   What's new in Update 2

- Quality and performance improvements.
- The capability to use an existing Acronis Backup Cloud unit for a ConnectWise Automate client.
- The dashboard with the Acronis Backup Cloud statistics.
- The dataviews with the Acronis Backup Cloud statistics.


# 3   What's new in Update 1

**Automation**

These features enable you to fully automate backups for all ConnectWise Automate clients that use the backup service.

- **Automatic installation of backup agents at the client and location levels.**
  Select the **Deploy agent on new machines automatically** checkbox at a client or location level. A backup agent will be silently installed on any computer that will be added to the client or location at a later time.

- **The capability to propagate a backup plan from one client to all of the clients.**

  Import a backup plan from any Acronis Backup Cloud customer group at **Dashboard** > **Config** > **Integration** > **Acronis Backup Cloud** > **Imported Backup Plans**. If, according to the backup plan, the backups should be encrypted, create the encryption password.

  An imported plan becomes available for all clients at the client, location, and computer levels. Click **Set as default** to make an imported plan the default for all clients.

**Flexibility**

These features give you the flexibility to adjust the integration to your needs, for example, to use a third-party system for ticketing.

- **The capability to disable creation of ConnectWise Automate tickets and alerts related to Acronis Backup Cloud.**

  Clear or select the **Ticket and alert integration** checkbox at **Dashboard** > **Config** > **Integration** > **Acronis Backup Cloud** > **Integration settings**.

- **The capability to delete the integration or edit the integration parameters without disrupting the backup service.**

  Customers' backups continue to run regardless of changes made to the integration.

**Usability**

- **The predefined search for Windows computers that do not have a backup agent**

  By using this search, located at **Searches** > **Backup Software** > **Backup - Acronis Backup Cloud (Machines Without Agent)**, you can create a group of computers from all clients and apply the installation script to this group.

- **The new button at the computer level leads to the recovery points in the backup console.**

  Click **Recover** to proceed directly to recovery, without intermediate steps.

- **Support for the light color theme in ConnectWise Automate 11**.


# 4   Activating your account

Prior to installing the plugin, please obtain an Acronis Backup Cloud account from an Acronis or partner sales representative. To obtain the account from Acronis, visit http://www.acronis.com/en-us/provider/backup-cloud/ and click **Contact Us**.

After signing the partnership agreement, you will receive an email message containing the following information:

- **An account activation link**. Click the link and set the password for your account. Remember your login that is shown on the account activation page.

- **A link to the login page**. By using this link, you can access the backup console directly from a browser. The login and password are the same as in the previous step.

# 5   System requirements

**Acronis plugin**

The Acronis plugin can be installed on a ConnectWise Automate Server running ConnectWise Automate version 10.5 or 11 and .NET Framework 4.5.2 or later.

**Acronis agents**

Agents are applications that perform data backup, recovery, and other operations on the computers managed by Acronis. An agent can be installed in any Windows or Mac operating system supported by ConnectWise Automate. For the exact list of supported operating systems, refer to http://www.acronis.com/en-us/support/documentation/Acronis_Backup_Cloud/index.html#33496.html.
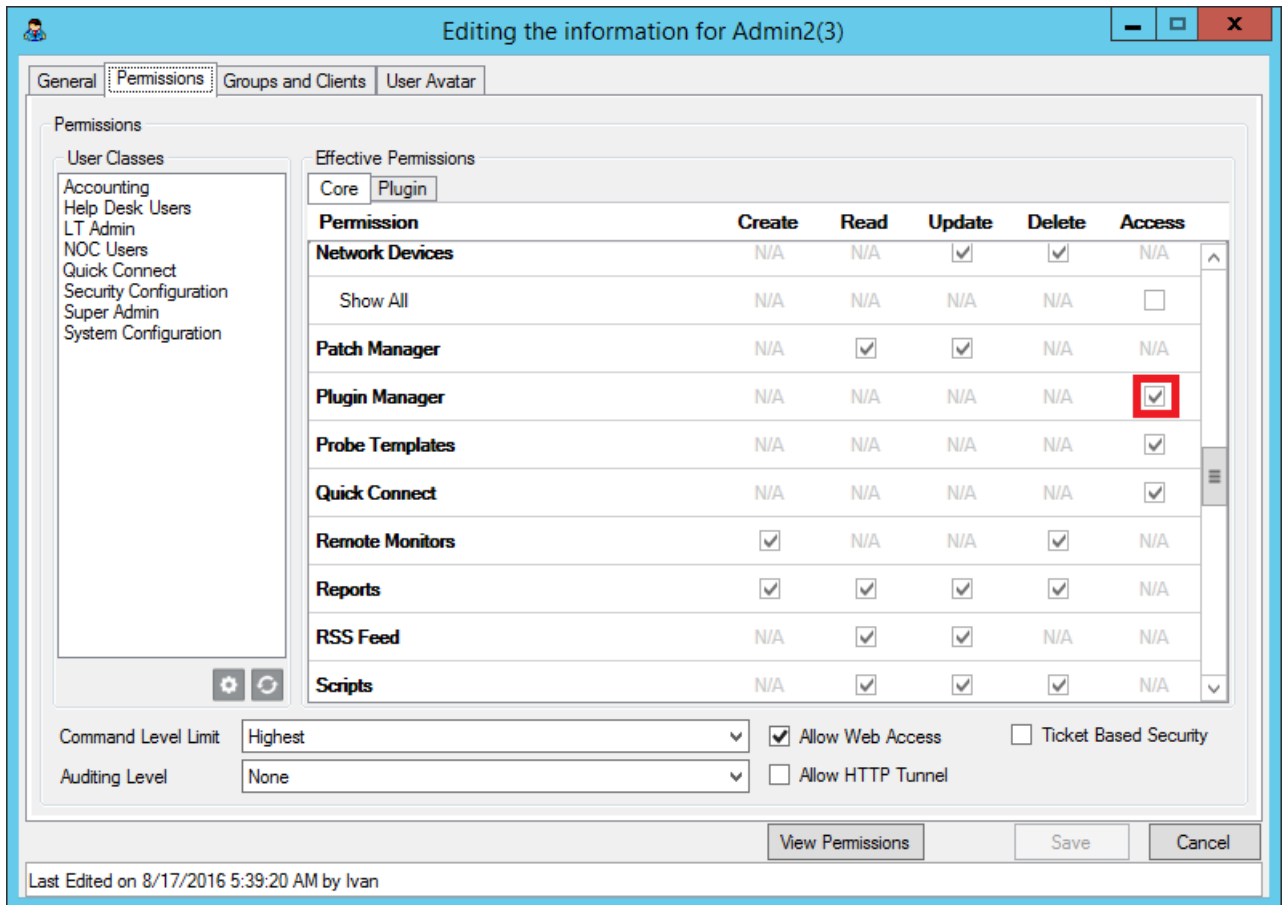
**Network requirements**

The diagram below illustrates the network connections that are necessary for the Acronis plugin to work.
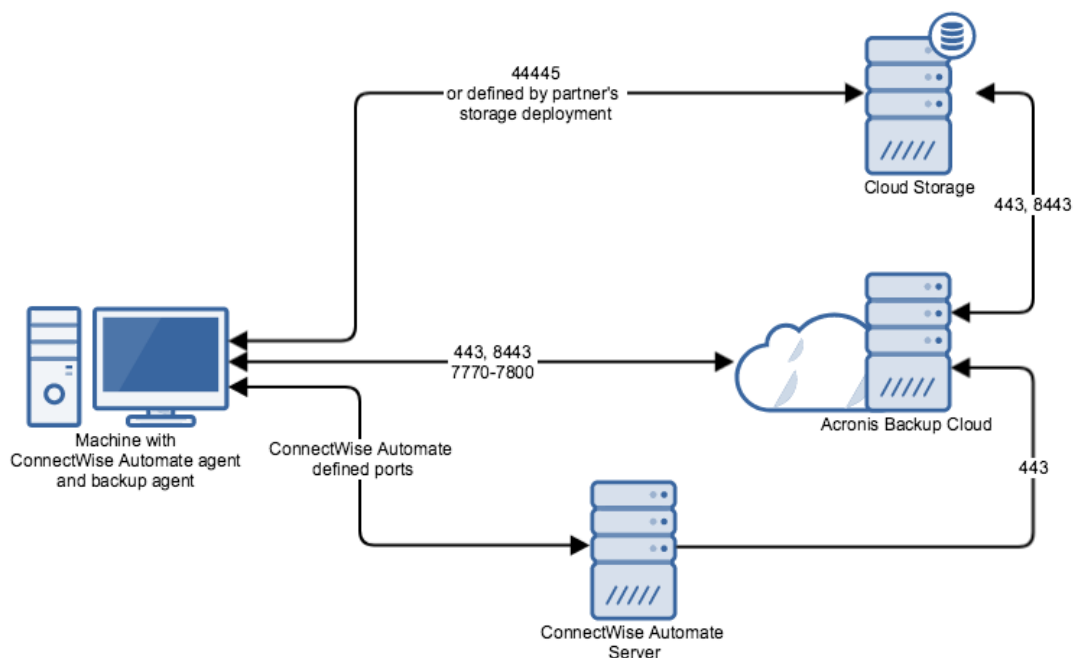
**User rights**

To install the plugin, a ConnectWise Automate user must have the **Core** > **Plugin Manager** permission set to **Access**.



To use and access the plugin once it is installed, a ConnectWise Automate user must have the **Plugin** > **Acronis Backup Cloud** permission set to **Access**.

# 6  Installation of Acronis plugin

You can download and install the Acronis plugin from the ConnectWise Automate **Solution Center**.

How to use the **Solution Center**:

- In ConnectWise Automate v10.5

  https://docs.labtechsoftware.com/LabTech10.5/Default.htm#UsingLabTech/SolutionCenter/SolutionCenter.htm

- In ConnectWise Automate v11

  https://docs.connectwise.com/ConnectWise_Automate/ConnectWise_Automate_Documentation/070/270
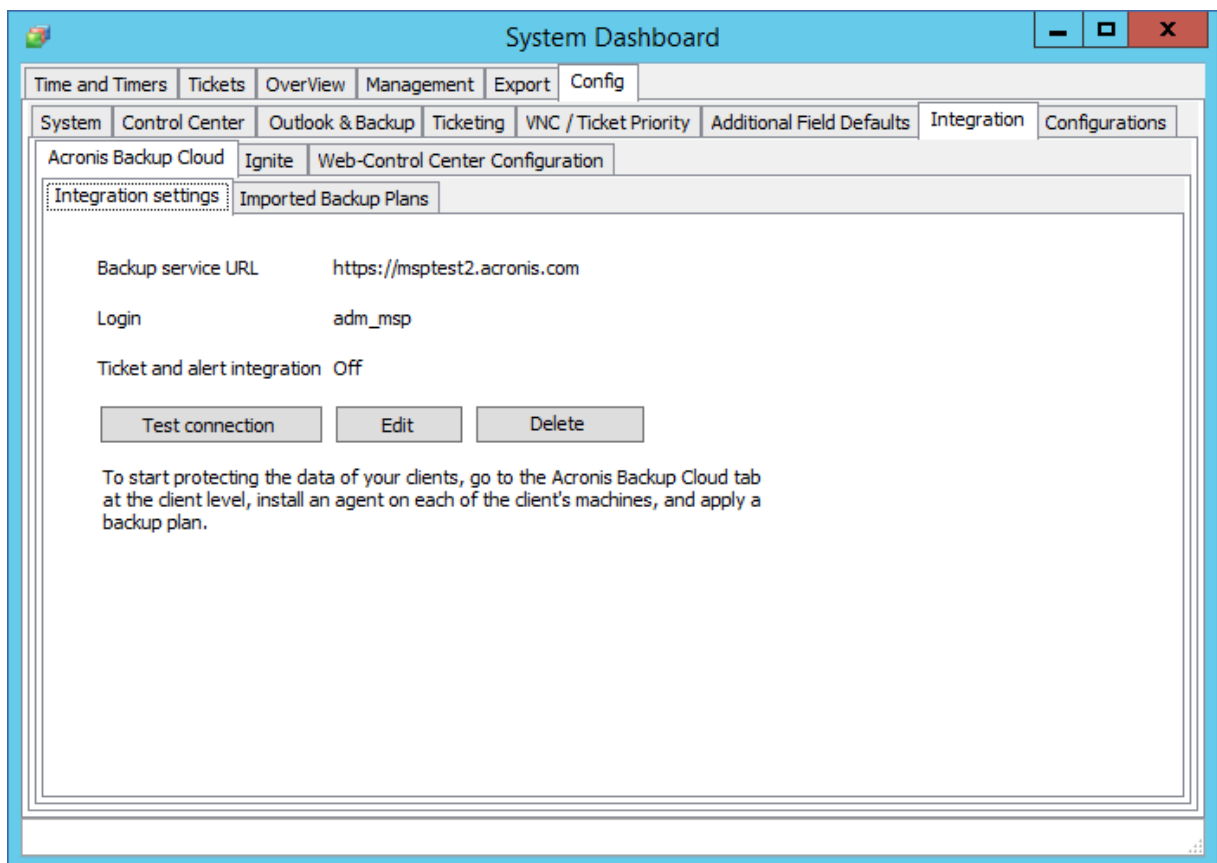
# 7   Creating customer groups

Once the plugin is installed, sign in to Acronis Backup Cloud and create a customer group for each ConnectWise Automate client whose computers you want to back up.

In this group, a customer account will be created. Its login and password will be used automatically when you click **Go to backup console** in the ConnectWise Automate interface. You need to enter this login and password only if Acronis bootable media is used for recovery.

***To sign in to Acronis Backup Cloud***

1. Select **Dashboard** > **Config** > **Integration** > **Acronis Backup Cloud** > **Integration settings**.
2. Enter the Acronis Backup Cloud URL. This is the link you received in the account activation email message.
3. Enter the user name and password that you set when you activated your account in Acronis Backup Cloud.
4. [Optional] Disable the **Ticket and alert integration** check box, if you do not want ConnectWise Automate to create tickets and raise alerts related to backup issues. For details, see "Monitoring backup status" (p. 15).
5. Click **Save**.



***To set up a Customer group for a client***

1. Double-click the client name, and then select the **Acronis Backup Cloud** tab.
2. Specify whether to create a new Acronis customer group or use a customer group/unit that already exists in Acronis Backup Cloud.
3. [For a new group] Enter the required parameters and click **Create**.

- **Partner group**—The name of the partner group under which the customer group will be created. Normally, use the default setting. You have a choice only if there are partner groups under your partner group in Acronis Backup Cloud.

- **Customer group**—The customer group name. By default, this is the client name in ConnectWise Automate.

- **Login**—The user name of the customer account. By default, it is combined from your account user name in ConnectWise Automate and the client name.

- **Email**—The email address to which the notifications will be sent. By default, this is the email address of your account in ConnectWise Automate.

- **Password**—The password of the customer account.

- **Storage**—The cloud storage for the customer group. You have a choice only if you registered your own storage or have multiple storages inherited from parent groups. Please be aware that this setting cannot be changed after the customer group is created.

- **Notification settings**—The level of notifications that will be sent to the above email address. By default, notifications about errors and warnings will be sent.

- **Language**—The language of the notifications and Acronis Backup Cloud web interface.

[For an existing group] Select the **Partner group** (if available), **Customer group** or unit, and **Login** parameters, and then enter the password of the existing customer account.
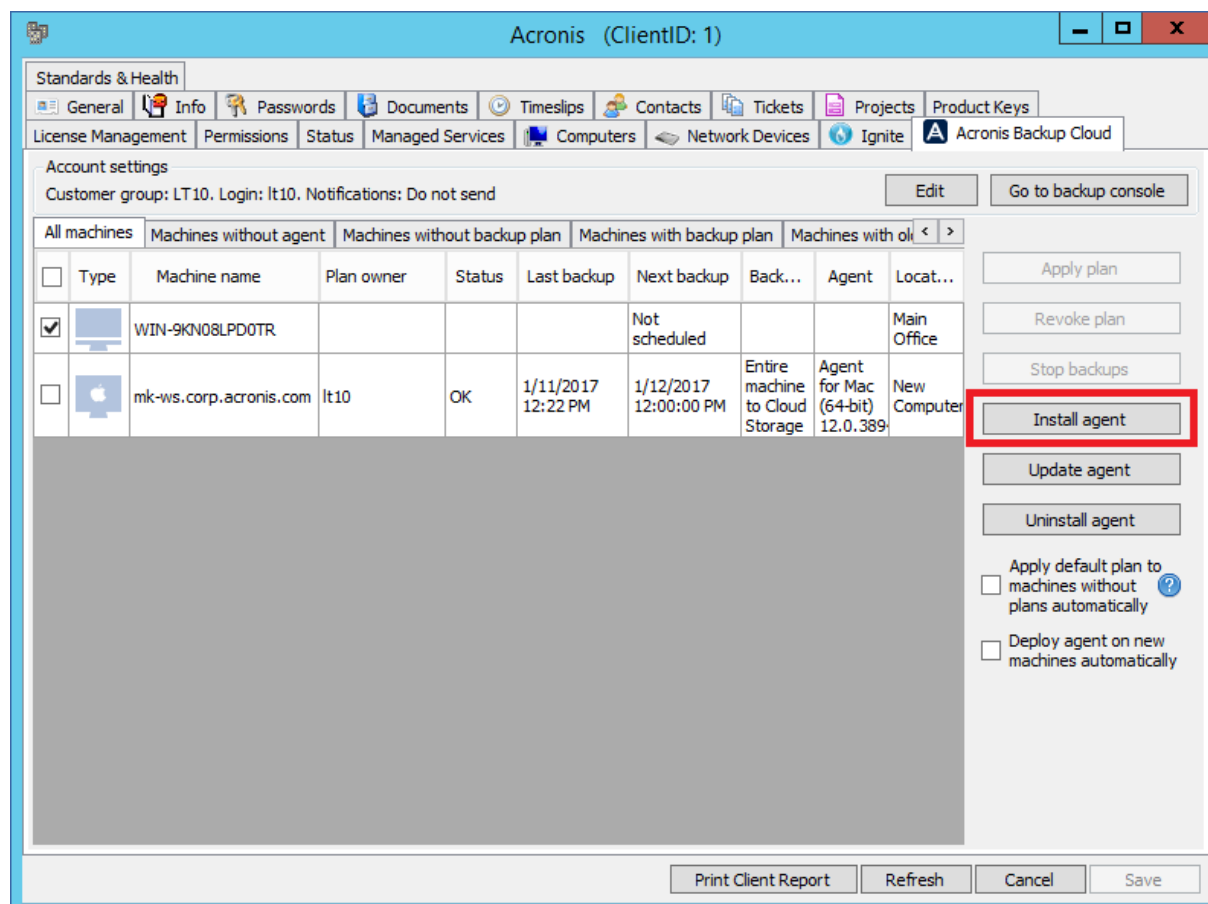
# 8 Installation of backup agents

A backup agent must be installed on every computer that you want to back up. There are two installation methods: from the ConnectWise Automate UI and by using the scripts provided with the plugin.

**Installation from the ConnectWise Automate UI**

This method enables you to install agents on any computers within a client or location.

*To install backup agents at a client or location level*

1. Double-click the client or location.
2. Click **Acronis Backup Cloud**.
3. Select the computers that you want to back up. To identify the computers that do not have backup agents, use the **Machines without agent** tab.
4. [Optional] Select the **Apply default plan to machines without plans automatically** checkbox. The details of this setting are described in the next section.
5. [Optional] Select the **Deploy agent on new machines automatically** checkbox. If you do this, a backup agent will be silently installed on any computer that will be added to the client or location at a later time.
6. Click **Install agent**.



*To install a backup agent at a computer level*

1. Double-click the computer.

2. Click **Acronis Backup Cloud**.
3. Click **Install agent**.

## Installation by using scripts

In addition to a client or a computer, an installation script can be applied to a group. You can group all computers that you need to back up, even from multiple clients, and install agents on these computers at once. There is a predefined search for this purpose at **Searches** > **Backup Software** > **Backup - Acronis Backup Cloud (Machines Without Agent)**. This search works for Windows computers only.

Also, this installation method enables you to install the backup monitor. The backup monitor is a small utility for end user self-service that appears in the tray area and enables users to see the backup progress; start and stop backups; or prevent backups from running. There are two installation scripts for installing agents with or without the backup monitor.

### To install backup agents by using an installation script

1. Right-click the group that you want to apply the script to.
2. In the shortcut menu, select **Scripts** > **Backup and Recovery** > **Acronis**, and then choose one of the following scripts:
   - Acronis Backup Cloud agent Install/Upgrade
   - Acronis Backup Cloud agent Install/Upgrade with backup monitor
3. [Optional] Specify the schedule. Usually, you need to perform installation only once. You may want to set up a schedule if new computers will be added to the group at a later time.
4. Click **OK** to confirm the settings.

## Updating backup agents

Updating is performed similarly to installation, either from the ConnectWise Automate UI or by using the installation script. To identify the agents that require an update, use the **Machines with old agent** tab at the client or location level.

## Uninstalling backup agents

Uninstallation is performed similarly to installation, either from the ConnectWise Automate UI or by using the uninstallation script.

# 9 Applying backup plans

A backup plan is a set of rules that specify how the given data will be protected on a given computer.

A backup plan can be applied to one or multiple computers.

***To apply a backup plan manually***

1. Double-click the client or location.
2. Click **Acronis Backup Cloud**.
3. Select the computers that you want to back up. To identify the computers that do not have backup plans, use the **Machines without backup plan** tab.
4. Click **Apply plan**.
5. Select the backup plan. If no custom backup plans were created, only the default backup plan is available.
6. [Optional] Select the **Run the backup plan immediately** checkbox. If you do this, the backups will be started on all of the selected computers immediately
7. Click **Apply**.



## Default backup plan

The default backup plan is **Entire machine to Cloud Storage**. According to this plan, a computer is backed up to the cloud storage daily from Monday to Friday at 11:00 PM.

You can recover any files from this backup, as well as individual volumes or the entire computer.

The retention rules are applied to each backup set separately:

- A monthly backup is the first backup created after a month starts. Monthly backups are kept for six months.
- A weekly backup is the backup created on Monday. Weekly backups are kept for four weeks.
- All other backups are considered daily. Daily backups are kept for seven days.
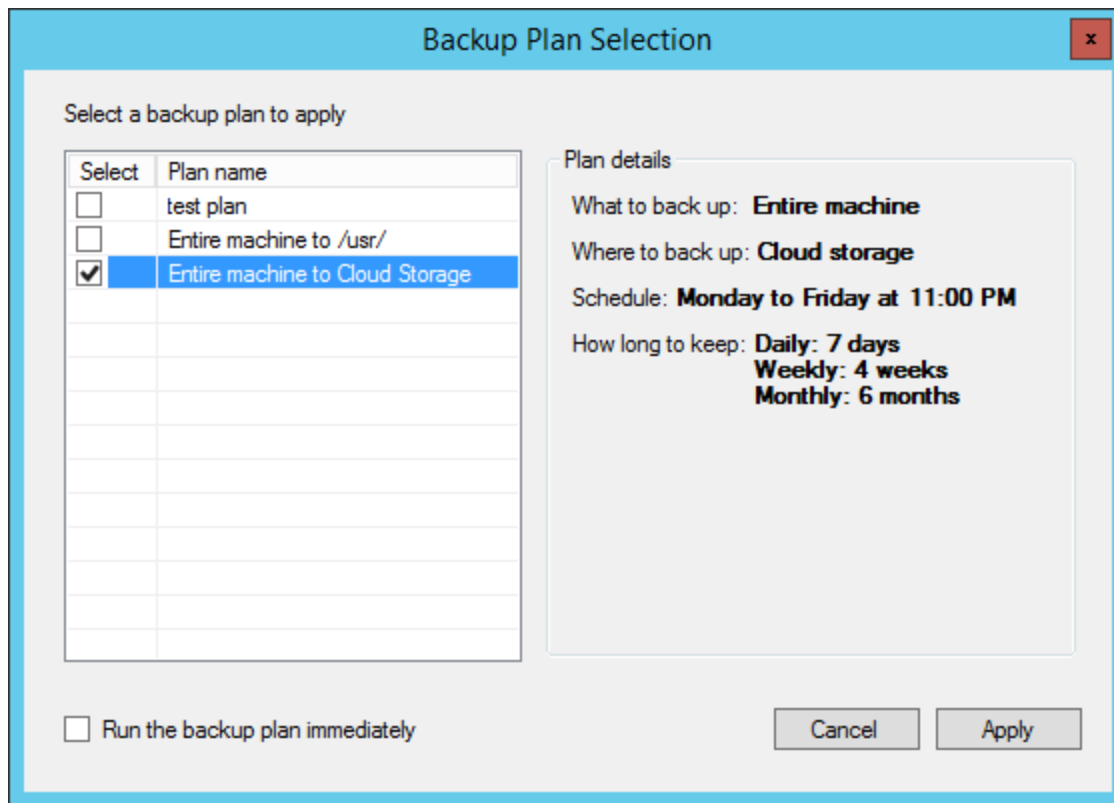


If you want the default backup plan to be applied automatically, select the **Apply default plan to machines without plans automatically** checkbox at the client or location level. The Acronis plugin will scan the computer statuses every six minutes, and apply the default backup plan to computers that have an agent but do not have a backup plan.

## Custom backup plans

If you need more flexibility in terms of backed up items, schedule, or location, click **Go to backup console** and create a backup plan by using the numerous options offered by Acronis Backup Cloud. The backup plans created in the Acronis Backup Cloud web interface are then synchronized and available for further use in the ConnectWise Automate interface.

For detailed information about the backup capabilities, refer to Acronis Backup Cloud Help: http://www.acronis.com/en-us/support/documentation/Acronis_Backup_Cloud/index.html#33507.html

## Importing backup plans

A custom backup plan appears in the ConnectWise Automate interface only for the client for whom the plan is created. If you want a custom backup plan to be available to all clients, import this plan to ConnectWise Automate. An imported plan becomes available for all clients at the client, location, and computer levels.

### To import a backup plan to ConnectWise Automate

1. Select **Dashboard** > **Config** > **Integration** > **Acronis Backup Cloud** > **Imported Backup Plans**.

2. Click **Import**.
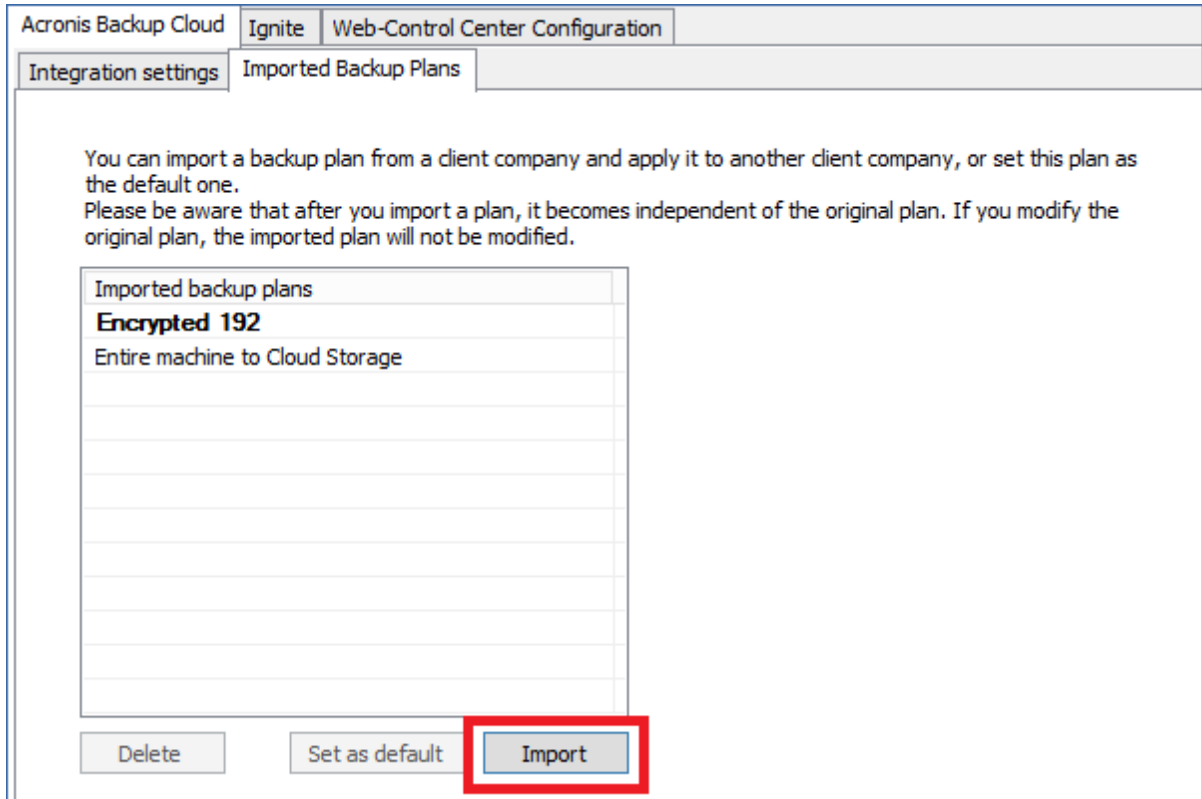


3. Select the customer group. The software displays a list of backup plans available for this customer.

4. Select a plan. The software displays its details.

5. If, according to the backup plan, the backups should be encrypted, create the encryption password. Note that the same password will be used for all clients.

   **Important**  *There is no way to recover encrypted backups if you lose or forget the password*

6. Click **Import**.

The plan appears in the **Imported backup plans** list.

You can click **Set as default** to make an imported plan the default for all clients.

# 10 Operations with backup plans

***To start a backup outside of its schedule***

1. Double-click the computer that you want to back up.

2. Click **Acronis Backup Cloud**.

3. Select the backup plan that you want to run.

4. Click **Start backups**.

After refreshing the status, you will see the backup progress in the **Status** column.

***To stop a running backup***

1. Double-click the computer.

2. Click **Acronis Backup Cloud**.

3. Select the backup plan that has the **Backing up** status.

4. Click **Stop backups**.

This will stop the currently running backup and remove the incomplete backup file from the storage. The next backup will run as scheduled.

Unlike starting a backup, it is possible to stop a backup on multiple computers at once. Select the computers at a client or location level and click **Stop backups**.

***To revoke a backup plan***

1. Double-click the computer.

2. Click **Acronis Backup Cloud**.

3. Select the backup plan that you want to revoke.

4. Click **Revoke plan**.

The backup created by this plan will be kept. Any other plans applied to this computer will run as scheduled.

***To revoke a backup plan from multiple computers***

1. Double-click the client or location.

2. Click **Acronis Backup Cloud**.

3. Select the computers that you want to revoke the backup plan from.

4. Click **Revoke plan**.

5. Select the backup plan that you want to revoke.

6. Click **Revoke**.

# 11 Monitoring backup status

**Monitoring at a client, location, or computer level**

For each computer that has a backup plan, you can see the following parameters:

- The status, which is derived from the last backup result (**OK**, **Error**, **Warning**, **Not protected**)
- The last backup date and time
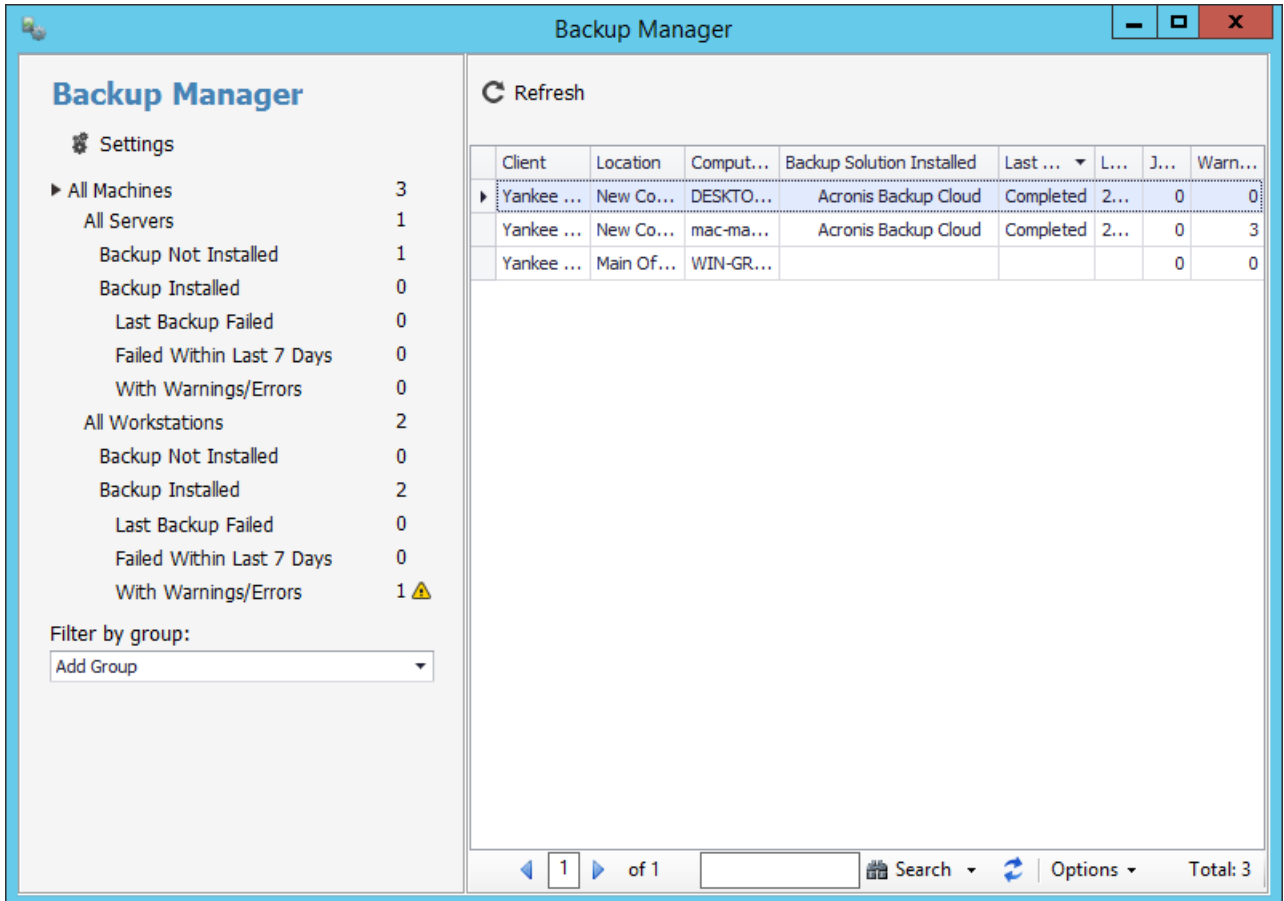- The next backup date and time

**Monitoring at the system level**

The Acronis plugin installs the monitors that are listed below. These monitors enable ConnectWise Automate to create tickets and raise alerts related to backup issues. To access the monitors in the ConnectWise Automate console, double-click **Monitors** on the top menu, and then select the **Internal Monitors** tab.

- Acronis Backup - Clients - Critical Issues
- Acronis Backup - Clients - Non Critical Issues
- Acronis Backup - Clients - Warnings
- Acronis Backup - Computers - Critical Issues
- Acronis Backup - Computers - Non Critical Issues
- Acronis Backup - Computers - Warnings
- Acronis Backup - Computers - Missed Backups
- Acronis Backup - Computers - Not protected

To disable creating tickets and alerts related to Acronis Backup Cloud, clear the **Ticket and alert integration** checkbox at **Dashboard** > **Config** > **Integration** > **Acronis Backup Cloud** > **Integration settings**. The monitors will continue working, but the table they check will no longer be updated. You can enable the ticket and alert integration again at any time.

## Monitoring in Backup Manager

You can use the native ConnectWise Automate Backup Manager to monitor the backup status.



## Monitoring with Acronis Dashboard

The Acronis plugin installs the dashboard that provides the following information:

- **Protection status** - shows the numbers of machines with the **OK**, **Error**, and **Warning** backup statuses; the number of machines without a backup plan; and the number of machines without a backup agent.
- **Active alerts** - shows the numbers of Acronis Backup Cloud alerts with the severity of **Error** or **Warning**.
- **Monthly activities** - shows the monthly statistics about successful and failed backups.
- **Monthly storage usage** - shows the monthly usage of the cloud storage.

To access the dashboard, click **Acronis Dashboard** on the toolbar or select **View** > **Acronis Dashboard** from the main menu.
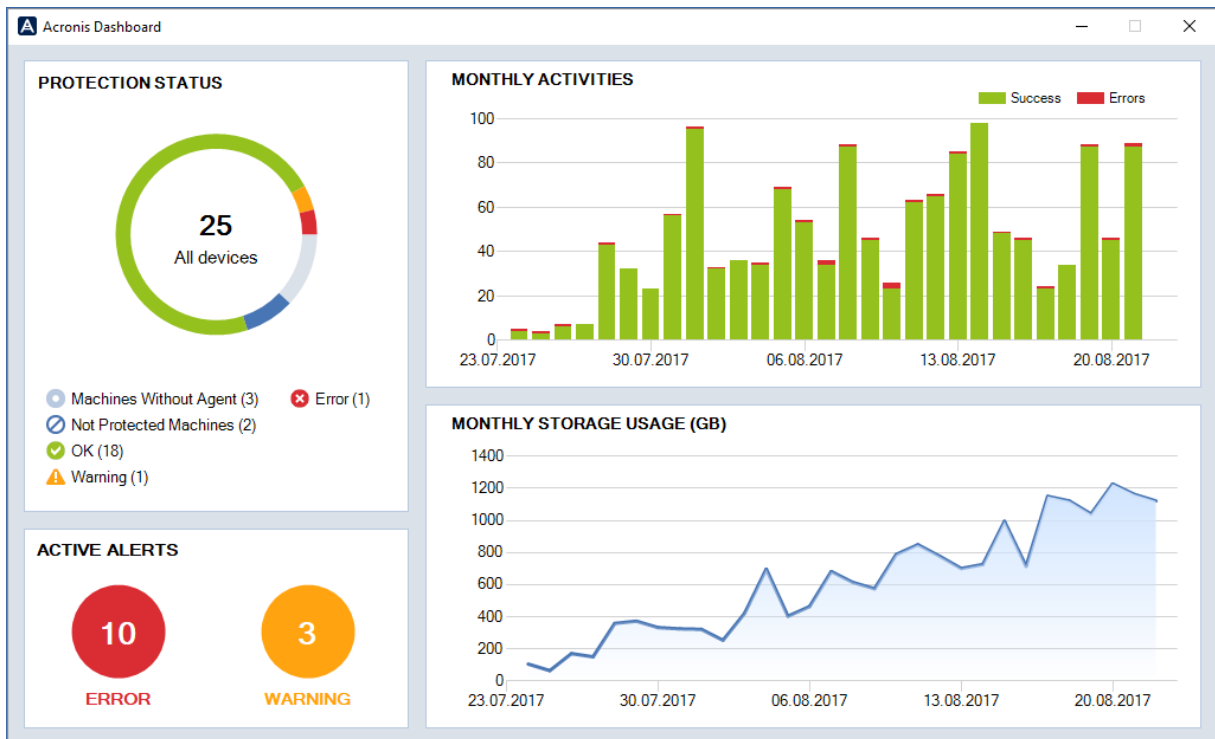


## Monitoring with Acronis Dataviews

The Acronis plugin installs the dataviews that sort the Acronis Backup Cloud statistics by the following criteria:

- **Active Alerts With Error Severity**
- **Active Alerts With Warning Severity**
- **Machines Without Agent**
- **Machines With Old Agent**
- **Machines With Backup Plan**
- **Machines Without Backup Plan**
- **Machines With Status Error**
- **Machines With Status Warning**
- **Machines With Status OK**

To access a dataview, click the corresponding item on the **Acronis Dashboard** or at **Operations** > **Dataviews** > **Acronis Backup Cloud**.

# 12 Reporting

Information about backups performed by Acronis Backup Cloud is present in the following ConnectWise Automate reports:

- **Backup Health**
- **Backup History**

# 13 Recovery

***To recover data to a computer***

1. Double-click the computer.

2. Click **Acronis Backup Cloud**.

3. Click **Recover**. This will take you to the Acronis Backup Cloud interface and the recovery points for this computer will be displayed.
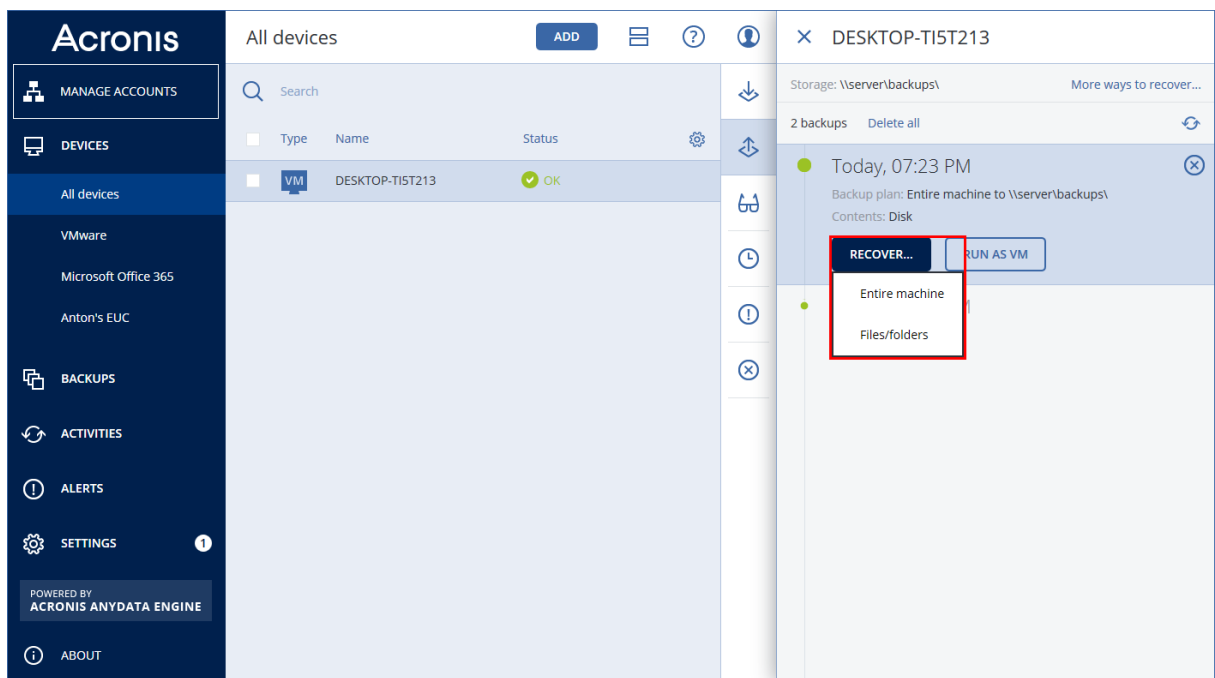


4. Follow the instructions described in Acronis Backup Cloud Help.

  ▪ File recovery:
    http://www.acronis.com/en-us/support/documentation/Acronis_Backup_Cloud/index.html#32957.html

  ▪ Machine recovery:
    http://www.acronis.com/en-us/support/documentation/Acronis_Backup_Cloud/index.html#33746.html

For full information about the recovery capabilities, refer to
http://www.acronis.com/en-us/support/documentation/Acronis_Backup_Cloud/index.html#33517.html