

Axcient

x360Cloud

User Guide

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Introduction

x360Cloud provides peace-of-mind by ensuring that the cloud data used in your organization is backed up, recoverable, and protected. x360Cloud backs up:

- Microsoft 365, and
- G Suite.

When you deploy x360Cloud, your critical data is backed up to our encrypted, tamper-proof Axcient Cloud. The Axcient Cloud gives you absolute protection against accidental or malicious data loss. With multiple redundant Axcient Cloud storage and best-in-class encryption, you can rely on 99.999% durability and 99.999% availability.

After data is backed up, x360Cloud administrators can instantly search data with rich filtering, and quickly select data to restore. In addition, detailed dashboards, reports, and monitoring of all backup activities visually indicate how x360Cloud is working to protect your data.

Microsoft 365 Supported Services

All Microsoft 365 Business Plans plans are supported by x360Cloud, including:

- Microsoft 365 Business Basic (formerly Office 365 Business Essentials)
- Microsoft 365 Business Standard (formerly Office 365 Business Premium)
- Microsoft 365 Business Premium (formerly Microsoft 365 Business)
- Microsoft 365 Apps (formerly Office 365 Business and Office 365 ProPlus)
- Enterprise E1, E3, E4, E5

x360Cloud for Microsoft 365 currently backs up the following service connectors:

- Mail
- Contact
- Calendar
- OneDrive
- SharePoint (Document Libraries)

x360Cloud for Microsoft 365 does *not* currently support:

- Exchange Online Archiving (In-Place Archive)
- Environments connected to a physical environment

Supported G Suite Services

x360Cloud supports the following G Suite services:

- Gmail
- Calendar
- Contacts
- Drive
- Shared Drive (G Suite Enterprise license only)
- Sites

Supported Browsers

You can use the latest versions of the following browsers to access x360Cloud:

- Chrome
- Firefox
- Safari

Security

Axcient holds our partners' data in highest regard. We maintain data integrity and protect partner data through methods that avoid compromise. Our data policies meet the requirements of GDPR (General Data Protection Regulation).

x360Cloud uses military-grade encryption when transporting data over Secure Sockets Layer (SSL) encrypted connections. From the SSL encrypted connections, it routes to an HTTPS stand-alone processes running behind a firewall. Our Server-Side Encryption (SSE) uses at minimum 128-bit SSL (128-bit) in transit and 256-bit Advanced Encryption Standard (256-bit AES) at rest. Stored data is only accessed by applications from behind a firewall.

x360Cloud is HIPAA Compliant. Please reference the [Axcient HIPAA Whitepaper](#) for details and requirements.

Terminology

Many key words used in this guide refer to industry terminology. For example:

Service:	<p>A <i>service</i> refers to the SaaS platform supported by x360Cloud. For example:</p> <ul style="list-style-type: none">• Microsoft 365• G Suite
Service Instance:	<p>A <i>service instance</i> refers to a specific occurrence of a service. Each instance displays its own unique domain name. For example:</p> <ul style="list-style-type: none">• cloudfinder.onmicrosoft.com• cloudfinder.ems.com
Connector:	<p>A <i>service connector</i> refers to the type of service. For example:</p> <ul style="list-style-type: none">• Mail• Contact• Calendar• SharePoint
Backup Objects:	<p>A backup object refers to the content type that is backed up, including:</p> <ul style="list-style-type: none">• Document• Email• Event• Contact <p>Please note that nested folders need to be restored individually. Metadata and permissions are backed up but not restored.</p>

Configuring x360Cloud

Configuring x360Cloud is a quick and streamlined process, allowing you to begin protecting client data after just a few simple steps.

As part of this setup process, you will complete the following steps:

- Sign up for an x360Cloud reseller account.
- Log in to the x360Cloud Reseller Portal.
- Create a new x360Cloud organization.
- Define end user data to be backed up.

Signing Up for an x360Cloud Reseller Account

As a first step, you need to create an x360Cloud reseller account. For example, you can sign up for an x360Cloud trial account, which will trigger the x360Cloud reseller account creation process.

You can sign up for an x360Cloud trial account from the Axcient Website.

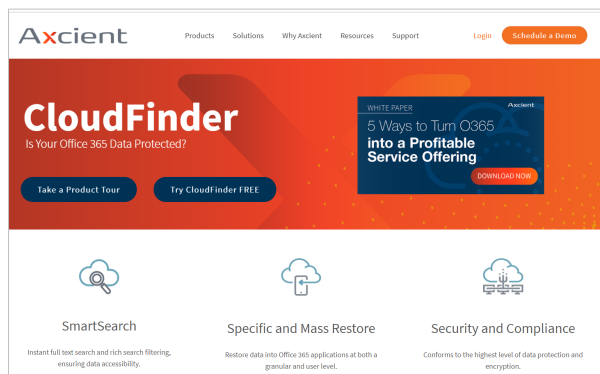


NOTE

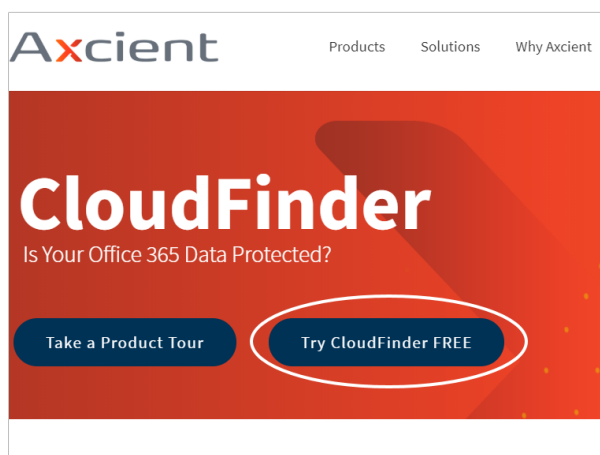
Trial accounts are valid for 14 days. You must upgrade a trial account before the 14 day trial period ends to ensure your services are not interrupted. Please contact your Partner Enablement Specialist or Partner Success Manager for help.

To sign up for an x360Cloud trial:

1. Navigate to x360Cloud section of the [Axcient.com](https://www.axcient.com) Website.



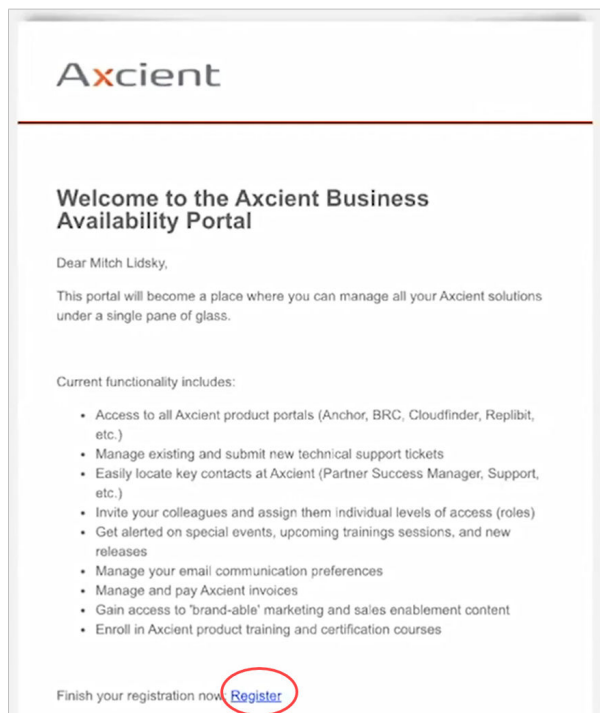
2. In the Axcient Website, click the **Try x360Cloud FREE** button.



3. In the *Trial* form, enter your contact information and click the **Submit** button.

A screenshot of the Axcient trial registration form. The header includes the Axcient logo and navigation links: Products, Solutions, Why Axcient, Resources, Support, Login, and a Schedule a Demo button. The main section features the text 'Try Axcient for FREE for 14 Days!' and 'Sign up and get started with no credit card required.' Below this is a form with several fields: 'How would you best describe yourself?' (dropdown menu), 'First name*', 'Last name*', 'Email*', 'Phone', 'What Product Would You Like to Try for FREE?' (dropdown menu), and 'What CloudFinder Feature are You Most Interested in Trying?'. To the right of the form is a laptop displaying the Axcient interface.

4. Wait for the Axcient Welcome email to arrive in your email Inbox and click the **Register** link. You will be redirected to the x360 Portal Registration page.



NOTE

To ensure Axcient can contact you through email, add Axcient to your safe senders list.

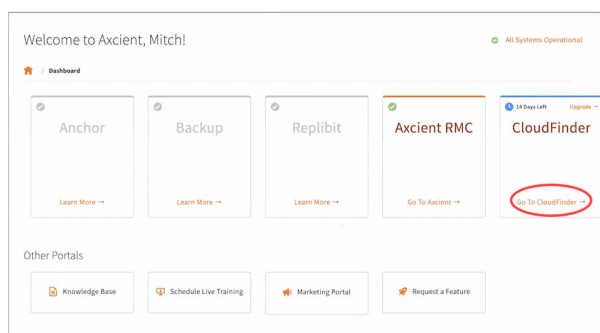
5. In the x360 Portal *Registration* page, create your personal account:
 - a. In the *First Name* field, confirm your **first name**.
 - b. In the *Last Name* field, confirm your **last name**.
 - c. In the *Email* field, view your **email address** (read-only).
 - d. Click the **Next** button when you are finished.

A screenshot of the Axcient registration form. The form is titled "Axcient Register to our Partner Portal". It includes fields for "FIRST NAME", "LAST NAME", and "EMAIL". Below the "EMAIL" field are "Cancel" and "Next" buttons. To the right of the form is a promotional banner for "Introducing Axcient X360". The banner lists features: Ransomware Recovery, Office 365 Protection, and Business Continuity. It also states "Axcient's One Platform to Protect Everything™ for MSPs" and includes a "Learn more" button. The bottom of the banner features the "X360" logo and the tagline "One Experience."

6. After entering your personal information, you will be prompted to create a password for the x360 Portal:

- a. In the *Password* field, enter a strong **password**.
- b. In the *Confirm Password* field, **confirm the password** entered above.
- c. Click the **Create Account** button when you are finished.

7. After your account is created, you will be prompted to log in.
8. In the x360 Portal, find the x360Cloud product card and click the **Go To x360Cloud** link. You will be redirected to the x360Cloud Reseller Portal.



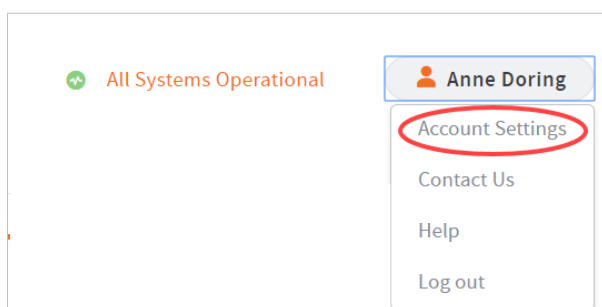
9. When accessing the x360Cloud Reseller Portal for the first time, you will be prompted to accept Axcient terms and conditions:
 - a. Click the **I have read and agree to the Master Terms of Service** checkbox.
 - b. Click the **I have read and agree to the Axcient Systems Partner Agreement** checkbox.
 - c. Click the **I Agree** button to save your settings.

Configuring Multi-Factor Authentication

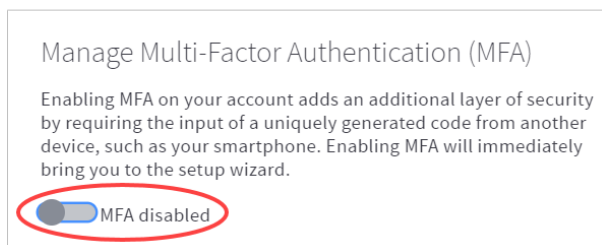
After logging in to the x360 Portal, you can optionally configure Multi-Factor Authentication (MFA). Enabling MFA on your account adds an additional layer of security by requiring the input of a uniquely generated code from another device, such as your smartphone.

To configure MFA:

1. In the [x360 Portal](#), click your **account name** and select **Account Settings**.

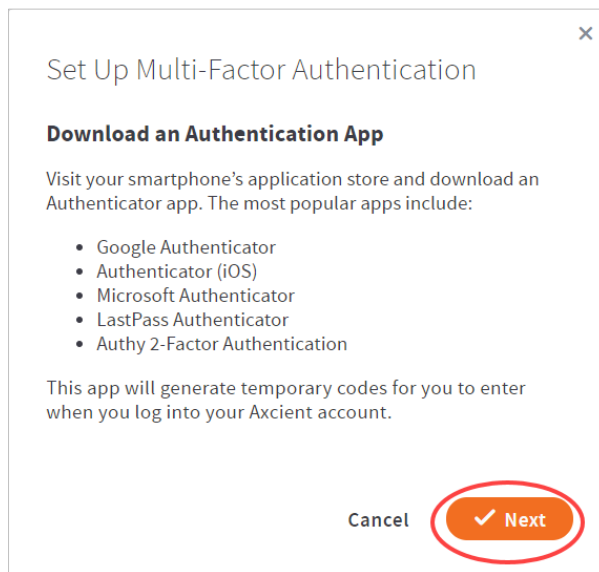


2. In the *Manage Multi-Factor Authentication (MFA)* section, click to toggle on MFA.



A *Set Up Multi-Factor Authentication* pop-up window displays, prompting you to configure settings.

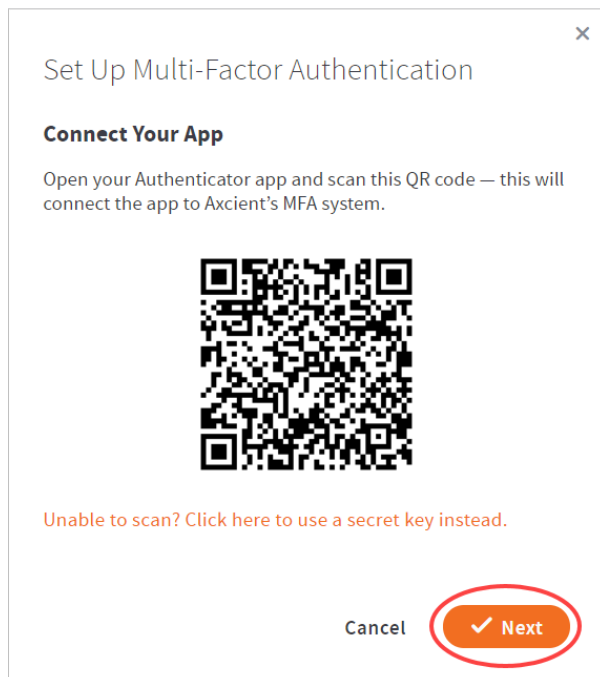
3. In the *Set Up Multi-Factor Authentication* pop-up window, click the **Next** button to begin the configuration process.
4. Using your smartphone, download your preferred Authenticator App. For example, you can select from:
 - a. Google Authenticator,
 - b. Authenticator (iOS),
 - c. Microsoft Authenticator,
 - d. LastPass Authenticator, or
 - e. Authy 2-Factor Authentication.
- f. Click the **Next** button when you are finished installing your Authenticator App.



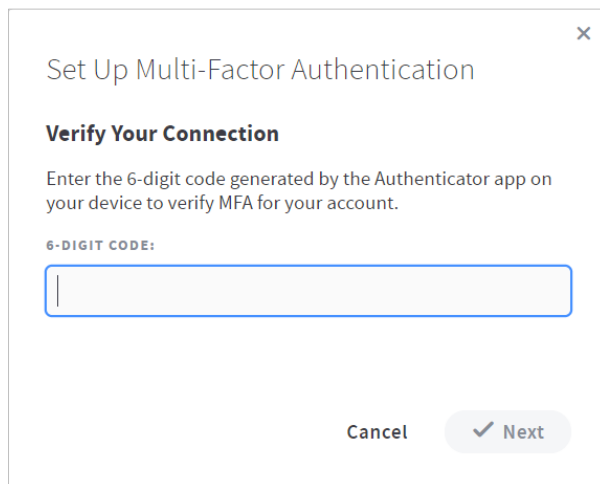
5. Open your Authenticator App and use your smartphone camera to scan the QR code displayed in the pop-up window. This process will vary based on your selected Authenticator App.

Alternatively, If you prefer not to scan the QR code, you can use a secret key instead. Click the **Unable to scan?** link to manually input a 16-digit key code.

Click the **Next** button when you are finished.



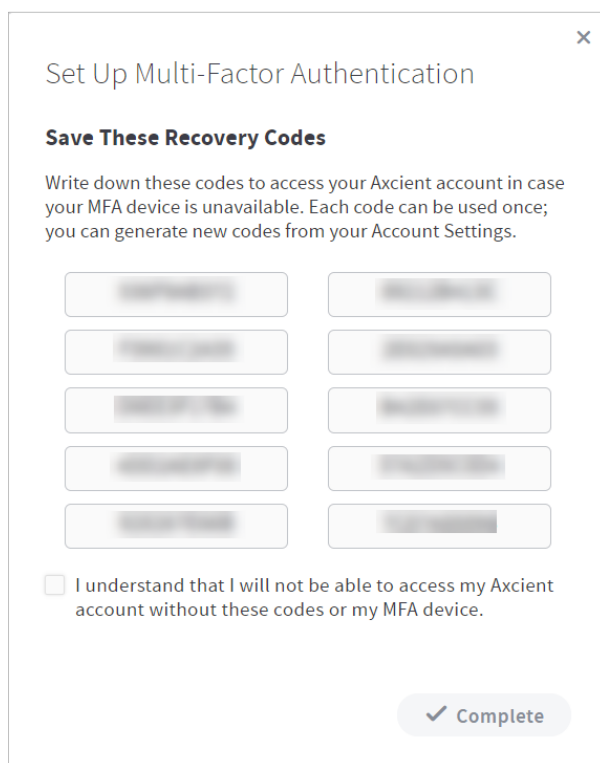
6. Your Authenticator App will display a six-digit code. Enter this **code** in the pop-up window and click the **Next** button.



A dialog box titled "Set Up Multi-Factor Authentication" with a close button (X) in the top right corner. Below the title is the section "Verify Your Connection". The text inside says: "Enter the 6-digit code generated by the Authenticator app on your device to verify MFA for your account." Below this text is a label "6-DIGIT CODE:" followed by a text input field with a blue border. At the bottom of the dialog are two buttons: "Cancel" and "Next" (which has a checkmark icon).

7. Save the recovery codes displayed in the pop-up window. These recovery codes can be used to access your Axcient account in case your MFA device is unavailable. Each code can only be used once.

Click the **Complete** button when you are finished.



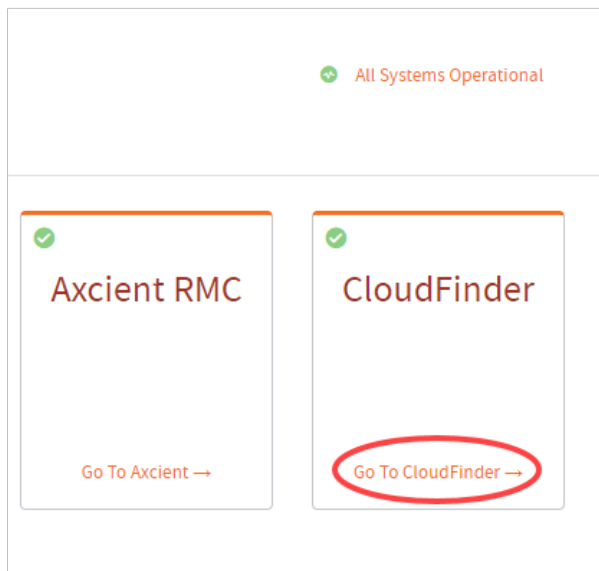
A dialog box titled "Set Up Multi-Factor Authentication" with a close button (X) in the top right corner. Below the title is the section "Save These Recovery Codes". The text inside says: "Write down these codes to access your Axcient account in case your MFA device is unavailable. Each code can be used once; you can generate new codes from your Account Settings." Below this text is a grid of ten blurred rectangular boxes, arranged in two columns of five, representing the recovery codes. At the bottom left is a checkbox with the text: "I understand that I will not be able to access my Axcient account without these codes or my MFA device." At the bottom right is a button labeled "Complete" with a checkmark icon.

Creating an Organization

When you have an x360Cloud reseller account, you can log in and create an organization.

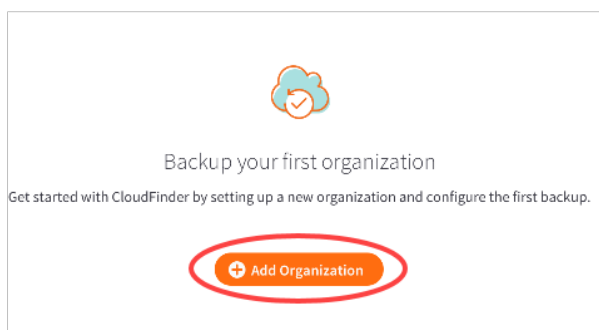
To log in to your x360Cloud reseller account:

1. In the [x360 Portal](#), find the x360Cloud product card and click the **Go To x360Cloud** link.



2. If you have not set up an organization, you will be directed to the *Back Up Your First Organization* page.

Click the **Add Organization** button.



NOTE

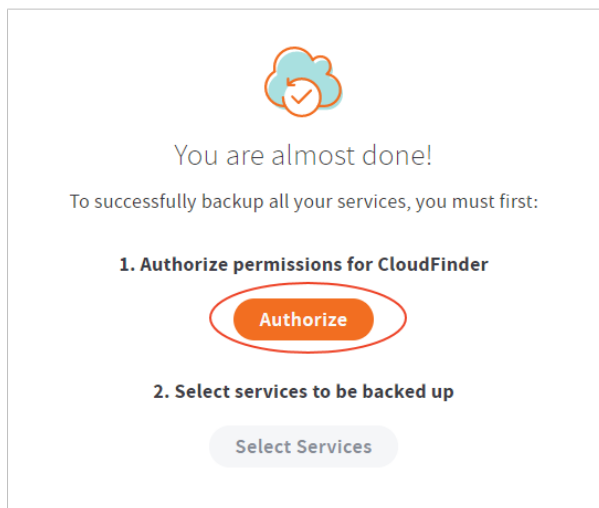
If this is *not* your first organization, click the **Add Organization** button located at the top of the left-hand navigation bar.

3. In the *New Organization* page, enter all required information about the new organization.

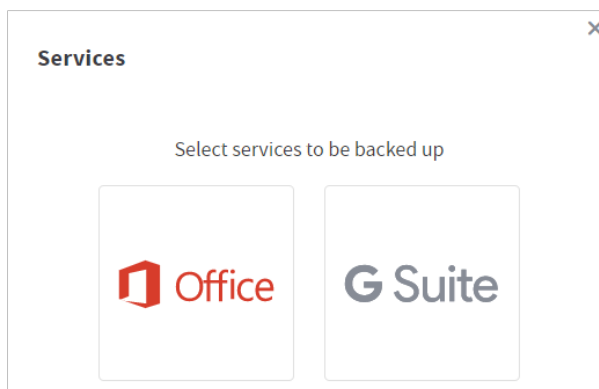
- a. In the *New Organization* section, enter descriptive information about the new organization, including:
 - In the read-only *Parent Organization* field, you can view the **name of the parent organization** under which this new organization will be created. The parent organization is typically the name of your reseller account.
 - In the *Organization Name* field, enter the **name of the new organization**.
 - In the read-only *Parent ID* field, you can view the **ID of the parent organization**. The parent organization is typically your reseller account.
- b. In the *General Information* section, enter contact details for the new organization, including:
 - In the *Address* field, enter the **street number and street name** of the new organization.
 - In the *Zip* field, enter the **zip code** of the new organization.
 - In the *State* drop-down menu, select the organization's **state**.
 - In the *Country* drop-down menu, select the organization's **country**.
 - In the *Phone* field, enter the **phone number** of the new organization.
- c. In the *Billing Information* section, enter billing details for the new organization, including:
 - In the *Billing Contact* field, enter the **contact name** for all billing-related communications.
 - In the *Billing Email* field, enter the billing **email address**.
 - In the *Billing Phone* field, enter the billing **phone number**.
 - Click the **Save** button when you are finished.

The screenshot displays a web form for creating a new organization. It is divided into three main sections: 'New Organization', 'Billing Information', and 'General Information'. The 'New Organization' section includes fields for 'Parent Organization' (read-only, showing 'AB-Comms'), 'Organization Name' (text input, showing 'Gloucestershire Support'), and 'Partner ID' (read-only, showing 'GLC-SPT01'). The 'Billing Information' section includes fields for 'Billing Contact' (text input, showing 'Billy Zander'), 'Billing Email' (text input, showing 'bzander@gloucestershire.com'), and 'Billing Phone' (text input, showing '(743) 876 3542'). The 'General Information' section includes fields for 'Address' (text input, showing '8937 Arcade St.'), 'Zip' (text input, showing '83106'), 'State' (drop-down menu, showing 'CA'), 'Country' (drop-down menu, showing 'United States'), and 'Phone' (text input, showing '(786) 763 9853').

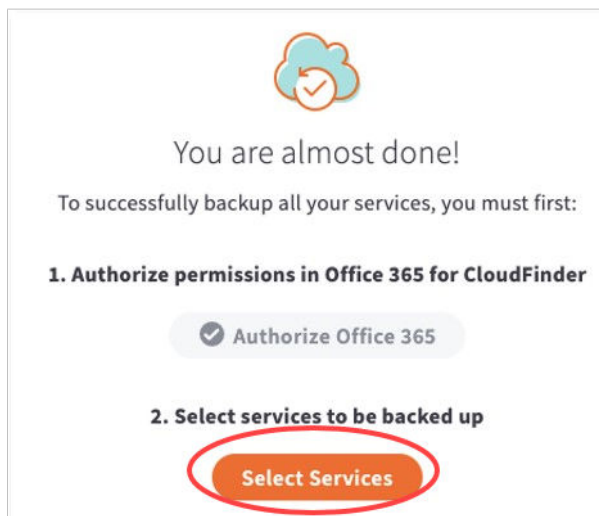
4. In the *Service Settings* page, click the **Authorize** button.



5. Select the **service** to be backed up.



6. Sign in to the account associated with the selected service. You will be prompted to authorize access to your data.
7. Next, click the **Select Services** button.



8. In the *Select Services to be Backed Up* pop-up window, click to select the **service connectors** you want to backup. For example, you might decide to back up emails, calendar items, and so forth. Click the **Save** button when you are finished.
9. When you are finished setting up your first organization, click the **Go to x360Cloud** button.



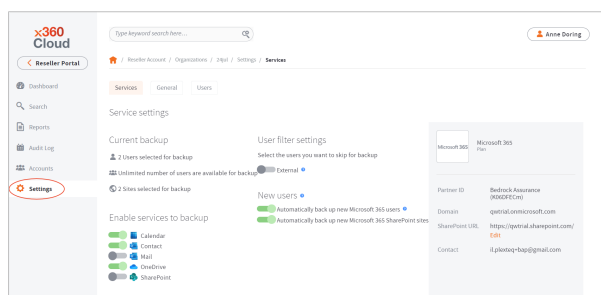
Configuring Client Account Settings

After you configure your organization, you will be redirected to the organization's *Settings* page, where you can configure additional settings for your client. For example, you can:

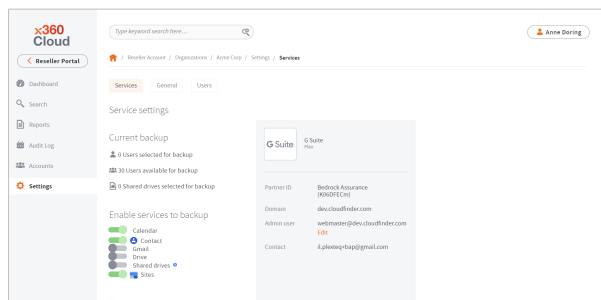
- Update service settings,
- Update general settings, including content visibility settings, and
- Create organization-level user accounts for your clients.

To configure organization settings:

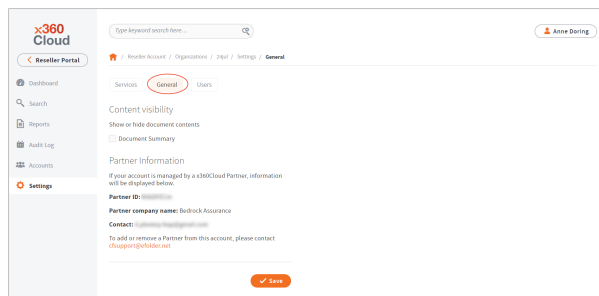
1. While still in the organization's *Settings* page, update service settings. For example, if you are working with a Microsoft 365 account, you can update the following settings:
 - a. In the read-only *Current Backup* section, you can view current backup statistics for the organization's account.
 - b. In the *Select Services* section, use the checkboxes to turn on and off Microsoft 365 service connectors to be backed up.
 - c. In the *User Filter Settings* section, click the **External** checkbox to skip external user accounts from the backup process.
 - d. In the *New Users* section, you can automatically back up new user accounts and new SharePoint sites:
 - Click the **Automatically Add New Microsoft 365 Users** checkbox to automatically back up all new user accounts.
 - Click the **Automatically Add New Microsoft 365 SharePoint Sites** checkbox to automatically back up all new SharePoint sites.
 - Click the Save button to save your changes.



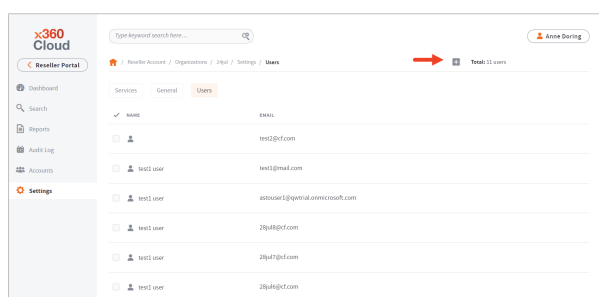
2. Alternatively, if you are working with a G Suite account, you can update the following settings:
 - a. In the read-only *Current Backup* section, you can view current backup statistics for the organization's account.
 - b. In the *Select Services* section, use the checkboxes to turn on and off G Suite service connectors to be backed up.
 - c. In the *New Users* section, you can automatically back up new user accounts and new Shared Drives:
 - Click the **Automatically Back Up New G Suite Users** checkbox to automatically back up all new user accounts.
 - Click the **Automatically Back Up New G Suite Shared Drives** checkbox to automatically back up all new Shared Drives.
 - Click the Save button to save your changes.



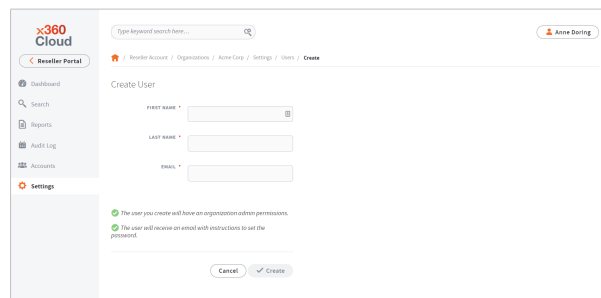
3. Click the **General** tab to view and modify additional preferences, including content visibility settings:
 - a. Click the **Document Summary** checkbox to turn on the ability to preview documents in the x360Cloud *Search* page.
 - b. In the *Partner Information* section, you can view x360Cloud partner information, including partner ID, company name, and contact information.



4. Click the **Users** tab to view existing organization-level user accounts.
 - a. Optionally, to create a new organization-level user account, click the **Create** button.



- b. Enter information about the new user, including:
 - i. First name,
 - ii. Last name, and
 - iii. Email address.



- c. Click the **Save** button when you are finished. The new user will receive an email with instructions on how to log in and configure a password. For more information, please reference [Creating Organization-Level User Accounts \[20\]](#).

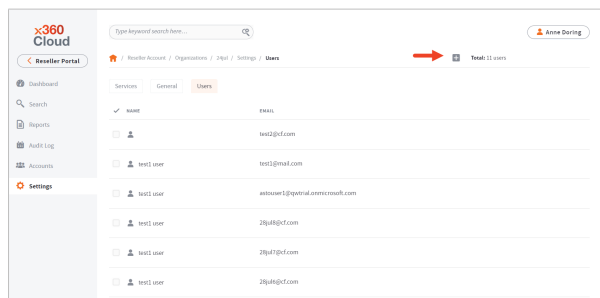
Creating Organization-Level User Accounts

You can optionally create organization-level user accounts so that your clients can log in to their instance of x360Cloud. When organization-level users log in, they can access the following functionality:

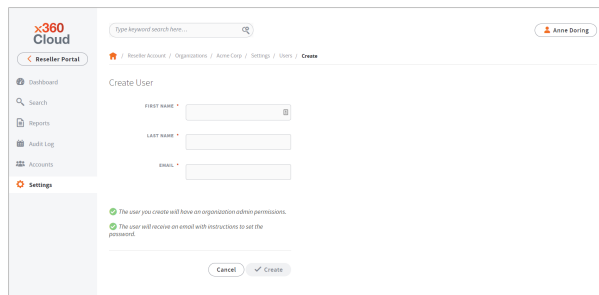
- Access their organization's instance of x360Cloud at <http://cloudfinder.axcient.com>;
- View organization backup reports;
- Perform organization data search and restore;
- Select (and de-select) organization end user accounts for backup;
- Manage organization backup settings;
- Add or edit organization SharePoint URLs;
- Toggle on or off services for backup;
- Explore organization audit logs;
- Create or delete other organization-level users; and
- Enable multi-factor authentication (MFA).

To create organization-level user accounts:

1. Navigate to the specific organization and click the **Settings** tab.
2. In the **Settings** page, click the **Users** tab.



3. In the *Users* tab, click the **Create** button.
4. Enter information about the new user, including:
 - a. First name,
 - b. Last name, and
 - c. Email address.



5. Click the **Save** button when you are finished. The new user account will receive an email with instructions on how to log in and configure a password.

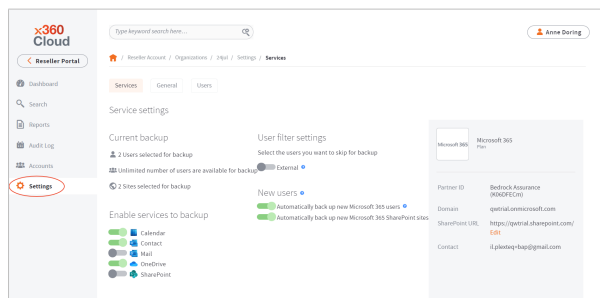
Automatically Backing Up Microsoft 365 User Accounts in x360Cloud

After you configure service information for a client account, you can specify the Microsoft 365 end user accounts that will be backed up. Optionally, you can configure x360Cloud to automatically back up new user accounts.

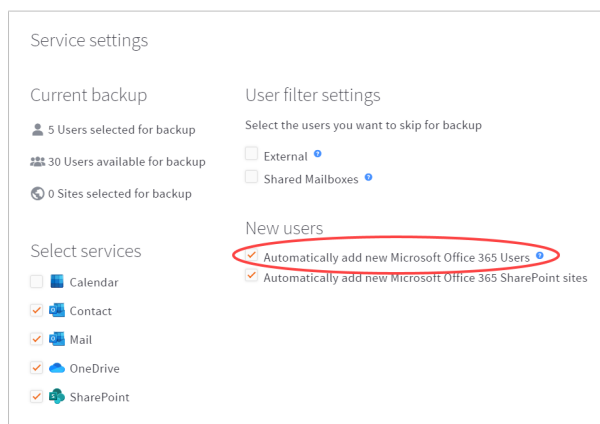
x360Cloud might take up to 24 hours to back up selected end user accounts. The initial back up might take up to 72 hours to complete. Future backups are automatically scheduled to run multiple times per day.

To back up Microsoft 365 end user accounts with x360Cloud:

1. Click the organization's **Settings** tab. The *Settings* page displays.



2. In the *New Users* section, click the **Automatically Add New Microsoft 365 users** checkbox to automatically back up Microsoft 365 end users in x360Cloud. Click the **Save** button to save your changes.



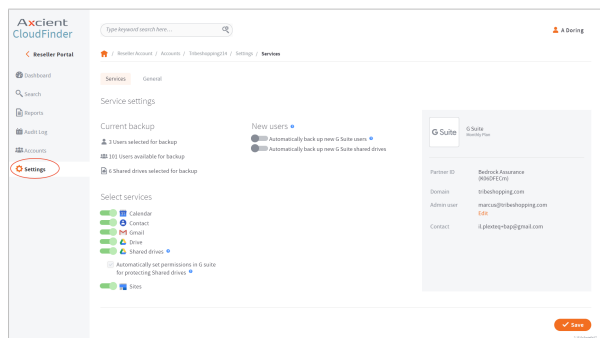
Automatically Backing Up G Suite User Accounts in x360Cloud

After you configure service information for a client account, you can specify the end user accounts that will be backed up. Optionally, you can configure x360Cloud to automatically back up new G Suite accounts.

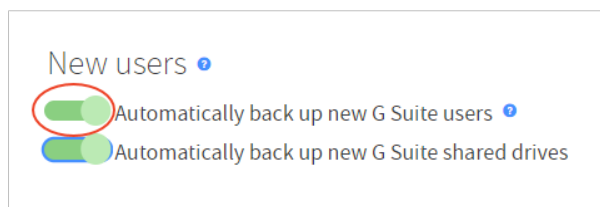
x360Cloud might take up to 24 hours to back up selected end user accounts. The initial back up might take up to 72 hours to complete. Future backups are automatically scheduled to run multiple times per day.

To back up end G Suite user accounts with x360Cloud:

1. Click the organization's **Settings** tab. The *Settings* page displays.



2. In the **New Users** section, click the **Automatically Back Up New G Suite Users** checkbox to automatically back up G Suite end users in x360Cloud. Click the **Save** button to save your changes.



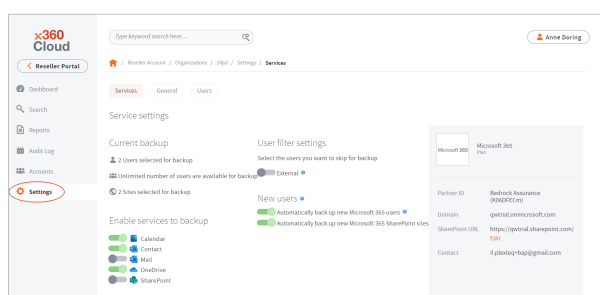
Automatically Backing Up SharePoint Site Collections in x360Cloud

After you configure service information for a client account, you can specify the SharePoint Site Collections that will be backed up. Optionally, you can configure x360Cloud to automatically back up new SharePoint Site Collections. Only SharePoint Document Libraries are backed up.

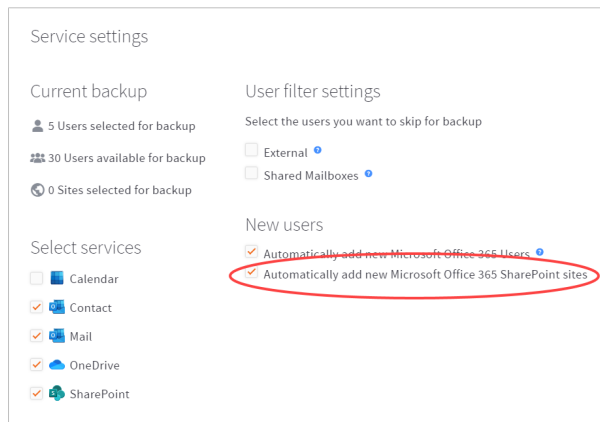
x360Cloud might take up to 24 hours to back up the selected Site Collections. The initial back up might take up to 72 hours to complete. Future backups are automatically scheduled to run multiple times per day.

To back up SharePoint Document Libraries with x360Cloud:

1. Click the organization's **Settings** tab. The **Settings** page displays.



2. In the *New Users* section, click the **Automatically Add New Microsoft 365 SharePoint Sites** checkbox. Click the **Save** button to save your changes.



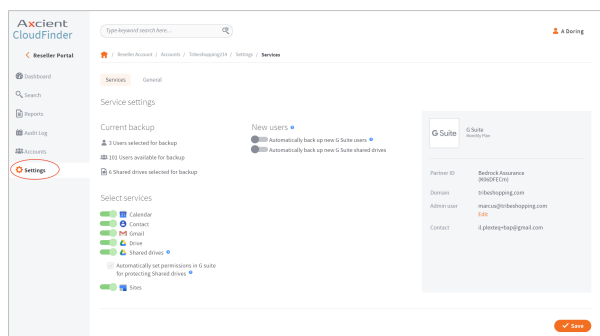
Automatically Backing Up G Suite Shared Drives in x360Cloud

After you configure service information for a client account, you can specify the Shared Drives that will be backed up. Optionally, you can configure x360Cloud to automatically back up new Shared Drives.

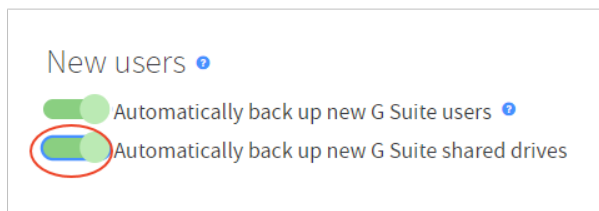
x360Cloud might take up to 24 hours to back up the selected Shared Drives. The initial back up might take up to 72 hours to complete. Future backups are automatically scheduled to run multiple times per day.

To back up Shared Drives with x360Cloud:

1. Click the organization's **Settings** tab. The *Settings* page displays.



2. In the *New Users* section, click the **Automatically Back Up New G Suite Shared Drives** checkbox to automatically back up Shared Drives in x360Cloud. Click the **Save** button to save your changes.



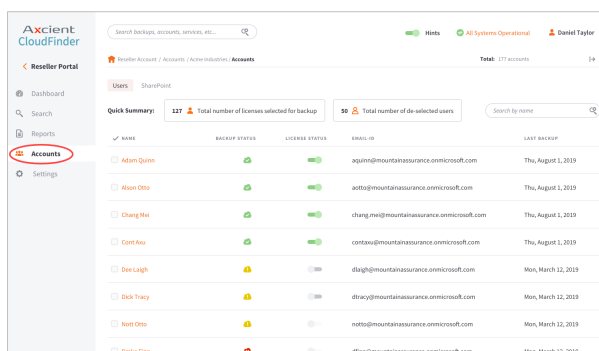
Manually Selecting Microsoft 365 End User Accounts for x360Cloud Backups

After you configure service information for a client account, you can specify the Microsoft 365 end user accounts that will be backed up. If you decide *not* to automatically back up Microsoft 365 end user accounts, you can manually select accounts in the *Accounts* page.

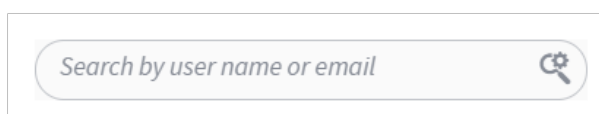
x360Cloud might take up to 24 hours to back up selected end user accounts. The initial back up might take up to 72 hours to complete. Future backups are automatically scheduled to run multiple times per day.

To manually select Microsoft 365 end user accounts for x360Cloud backups:

1. Click the organization's **Accounts** tab. The *Accounts* page displays.



2. In the *Search* field, click to open the SmartSearch filter tool. You can filter users based on *Name* or *Email Address*.
3. Click the **Search** button to complete the filtering process.



4. Click the **Users** tab to view only user accounts.

5. Use the *License Status* field to toggle on or off licenses for each user account. User Accounts *with* licenses will be backed up; user accounts *without* licenses will *not* be backed up.

NAME	BACKUP STATUS	LICENSE STATUS	EMAIL ID	LAST BACKUP
Cont Alex			contalex@mountainassurance.onmicrosoft.com	Thu, August 1, 2019
Dave Leigh			dleigh@mountainassurance.onmicrosoft.com	Mon, March 12, 2019

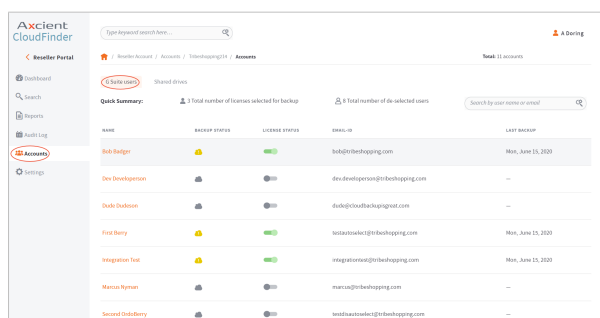
Manually Selecting G Suite End User Accounts for x360Cloud Backups

After you configure service information for a client account, you can specify the end user accounts that will be backed up. If you decide *not* to automatically back up G Suite end user accounts, you can manually select accounts in the *Accounts* page.

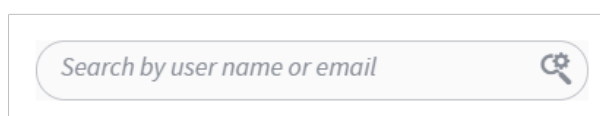
x360Cloud might take up to 24 hours to back up selected end user accounts. The initial back up might take up to 72 hours to complete. Future backups are automatically scheduled to run multiple times per day.

To manually select G Suite end user accounts for x360Cloud backups:

1. Click the organization's **Accounts** tab. The *Accounts* page displays.

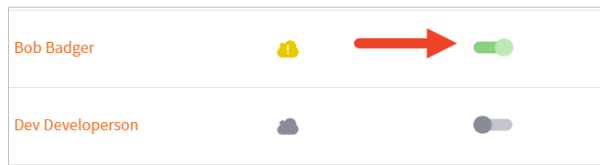


2. In the *Search* field, click to open the SmartSearch filter tool. You can filter users based on *Name* or *Email Address*.
3. Click the **Search** button to complete the filtering process.



4. Click the **Users** tab to view only user accounts.

5. Use the *License Status* field to toggle on or off licenses for each user account. User Accounts *with* licenses will be backed up; user accounts *without* licenses will *not* be backed up.



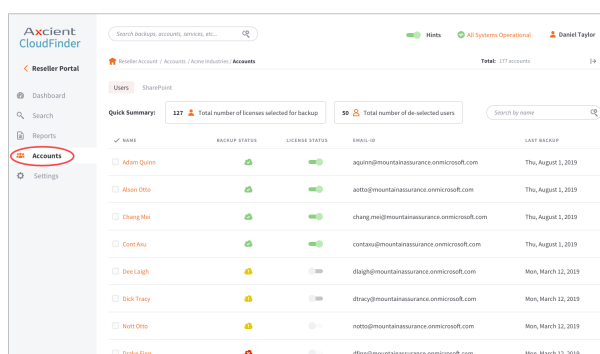
Manually Selecting SharePoint Site Collections for x360Cloud Backups

After you configure service information for a client account, you can specify the SharePoint Site Collections that will be backed up. If you decide *not* to automatically back up SharePoint Site Collections, you can manually select SharePoint Site Collections in the *Accounts* page. Only SharePoint Document Libraries are backed up.

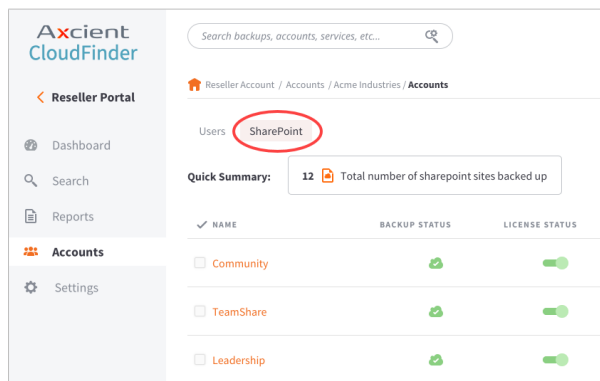
x360Cloud might take up to 24 hours to back up selected SharePoint Site Collections. The initial back up might take up to 72 hours to complete. Future backups are automatically scheduled to run multiple times per day.

To manually select SharePoint Site Collections for x360Cloud backups:

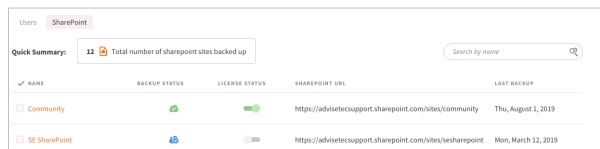
1. Click the organization's **Accounts** tab. The *Accounts* page displays.



2. In the *Accounts* page, click the **SharePoint** tab to view all SharePoint sites.



3. Use the *License Status* field to toggle on or off licenses for each SharePoint site. SharePoint sites *with* licenses will be backed up; SharePoint sites *without* licenses will *not* be backed up.



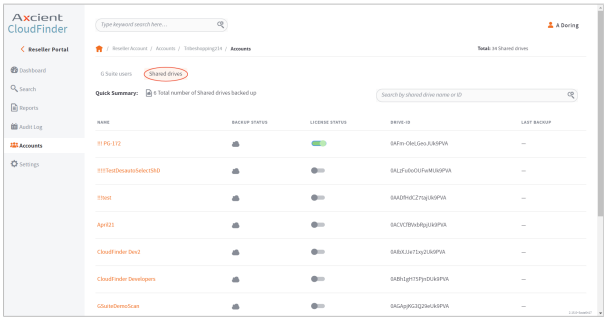
Manually Selecting G Suite Shared Drives for x360Cloud Backups

After you configure service information for a client account, you can specify the G Suite Shared Drives that will be backed up. If you decide *not* to automatically back up Shared Drives, you can manually select Shared Drives in the *Accounts* page.

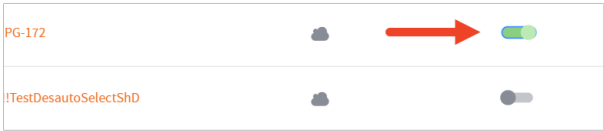
x360Cloud might take up to 24 hours to back up selected Shared Drives. The initial back up might take up to 72 hours to complete. Future backups are automatically scheduled to run multiple times per day.

To manually select Shared Drives for x360Cloud backups:

1. Click the organization's **Accounts** tab. The *Accounts* page displays.
2. In the *Accounts* page, click the **Shared Drives** tab to view all Shared Drives.



3. Use the *License Status* field to toggle on or off licenses for each Shared Drive. Shared Drives *with* licenses will be backed up; Shared Drives *without* licenses will *not* be backed up.



Navigating x360Cloud

After you configure x360Cloud for initial use, you can begin to navigate the Reseller Portal.

The x360Cloud navigation menu changes based on whether you are viewing the Reseller Portal or if you are viewing a specific client account.

This section of the guide will review x360Cloud navigation elements for both the Reseller Portal and a client account.

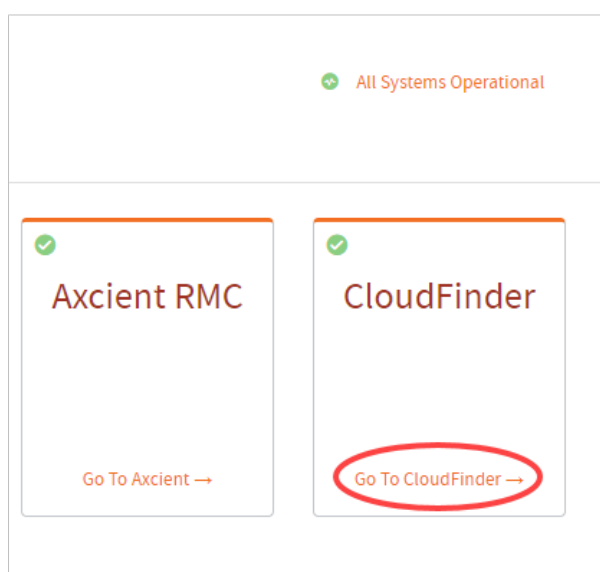
Navigating Your x360Cloud Reseller Account

The x360Cloud Reseller Portal allows you to:

- View overview information for each service instance,
- Create and update client accounts,
- View reports, and
- Manage settings for client accounts.

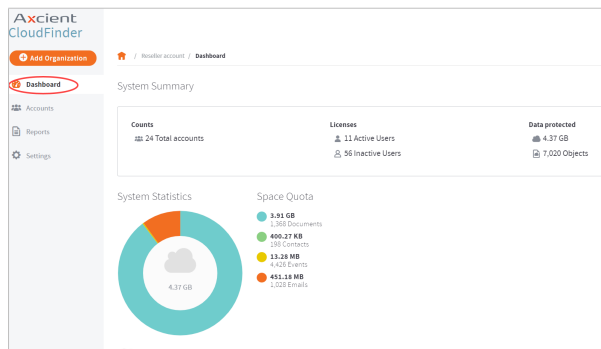
To navigate your x360Cloud Reseller Portal:

1. In the [x360 Portal](#), find the x360Cloud product card and click the **Go To x360Cloud** link.



- Click the **Dashboard** tab to view the *Dashboard* page. The Reseller Portal *Dashboard* page allows you to quickly view a count of all services you manage, as well as an overview of system statistics.

Optionally, click the **Download Report** link to download this data in CSV format.



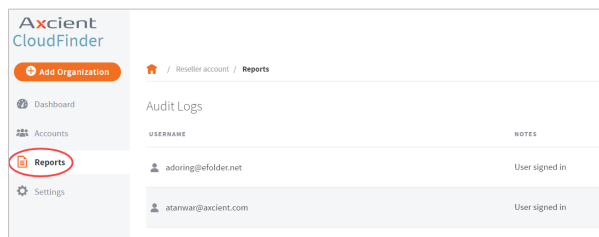
- Click the **Accounts** tab to view the *Accounts* page. The Reseller Portal *Accounts* page allows you to add client accounts for each client that you support. You can also click the **client ID** of each client account to view and update administrator accounts and services.

CLIENT ID	NAME
4901test	4901test
abc	abc
acmecorp	Acme Corp

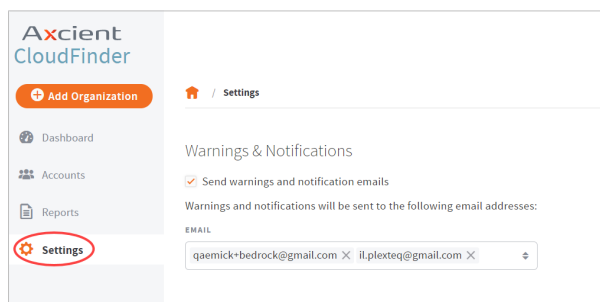
- Click the **Reports** tab to view the *Reports* page. The Reseller Portal *Reports* page allows you to view information about activities that occur in the system.

For example, use the Audit Log to view activities, including:

- Search,
- Restore,
- User sign in or out,
- Deletion of objects and their versions, and
- User updated organization settings.



5. Click the **Settings** tab to view the *Settings* page. The Reseller Portal *Settings* page allows you to manage warnings and notifications.



Navigating an x360Cloud Client Account

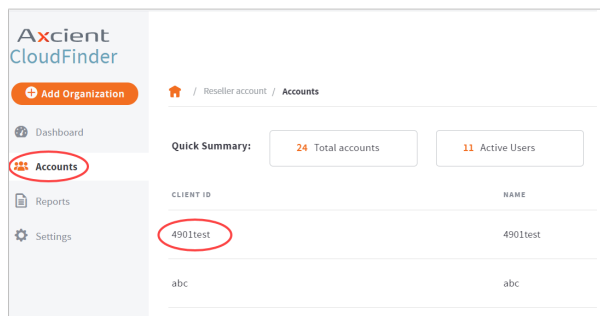
When you configure x360Cloud, you will create a new client account for each organization that you support.

Within each x360Cloud client account, you can:

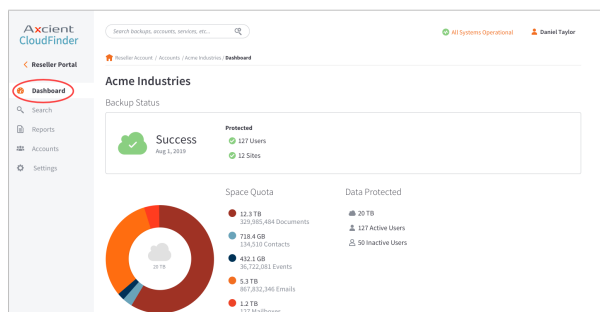
- View summary information of all service instances and backups for the client account,
- Search, export, and restore data for a protected end user,
- View reports for the client account,
- Add and manage end user accounts and other items protected by x360Cloud (including SharePoint sites and G Suite Shared Drives, if applicable), and
- Manage key settings for the client account.

To navigate your x360Cloud client account:

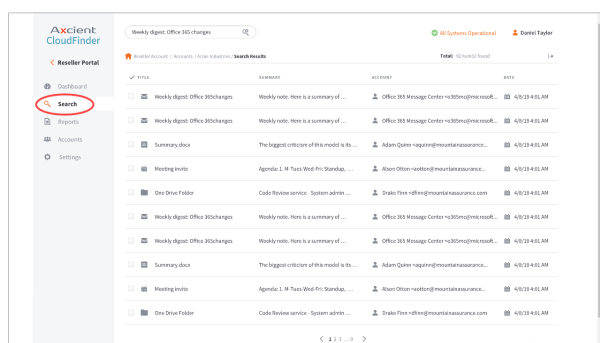
1. In the Reseller Portal *Accounts* page, click the **client ID** of the client account you want to manage. The client account *Dashboard* page displays, giving you access to client account details and reports.



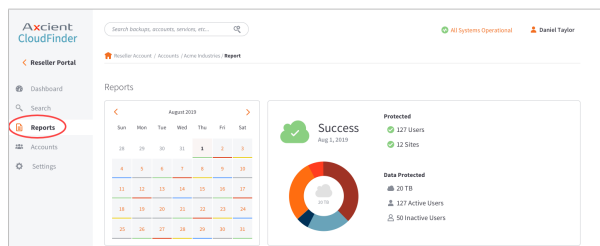
2. In the client account *Dashboard* page, you can view the backup status of user accounts and other items (including SharePoint sites and G Suite Shared Drives, if applicable). It also displays a summary of space quota and data protected.



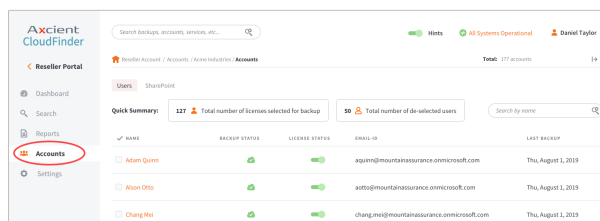
3. Click the *Search* tab to view the *Search* page. The client account *Search* page allows you to find backed up objects, like documents, events, and email messages. The search toolbar provides advanced filter options, allowing you to search by date, object type, user, or site. You can also use this page to export, migrate, or restore data.



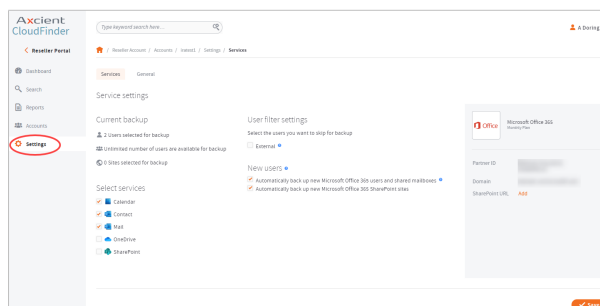
4. Click the *Reports* tab to view the *Reports* page. The client account *Reports* page allows you to search backup reports by date and time. You can also view backup status of items being protected by x360Cloud.



5. Click the *Accounts* tab to view the *Accounts* page. This page allows you to view all items being protected by x360Cloud, depending on which service you are backing up. For example, if you are protecting a Microsoft 365 service, you can use this page to view end user accounts and SharePoint sites. You can also use this page to turn on backups, migrate data, or restore data.



6. Click the *Settings* tab to view the *Settings* page. The client account *Settings* page allows you to view and edit service and general settings.



Managing x360Cloud

As an x360Cloud administrator, you are responsible for managing the health of client account backups and restoring data if needed. This section of the guide will review common management tasks, including:

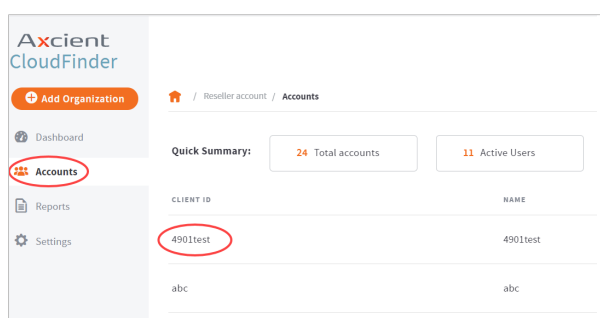
- Monitoring the Dashboard,
- Searching for data,
- Restoring or migrating data, and
- Monitoring user data.

Monitoring the Dashboard

When you first log in to a client account, you will be presented with the *Dashboard* page. You can use this page to view connected services, activity reports, and backup statistics.

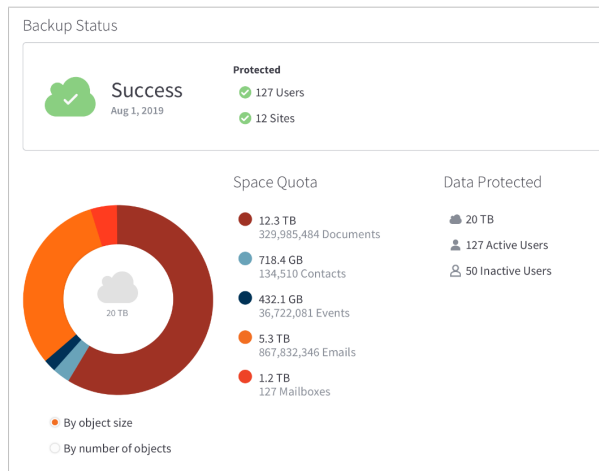
To monitor the Dashboard:

1. In the Reseller Portal *Accounts* page, click the **client ID** of the client account you want to manage. The client account *Dashboard* page displays, giving you access to client account details and reports.



2. In the *Dashboard* page, use the *Backup Status* panel to view the current backup status. For example, you might see a notification indicating that the backup is in progress, successful, or if it requires your attention. You will also see a total number of protected users and protected sites. Use the graphical display chart to see a breakdown of space quota.
 - a. Click the **By size** radio button to view a breakdown of each backup object type by space quota.

- b. Click the **By number** radio button to view a breakdown of each backup object by number of items.



3. In the *Recent Activity Reports* panel, view summary information for the most recent Backup, Restore, and Export reports.
 - a. Click the **Backup** tab to view the backup status (including *in progress*, *success*, *warning*, or *failure*), the amount of data backed up, the number of users and sites backed up, and the number of objects backed up.
 - b. Click the **Restore** tab to view the start and end date of each restore process, the status of the restore process, number of objects restored, and the total time spent on the restore process.
 - c. Click the **Export** tab to download objects exported from the *Search* tab. Objects will be exported as zip files.

Backup Restore Export			
DATE	BACKUP STATUS	NUMBER OF USERS	NUMBER OF SITES
9/24/19 7:55 AM		1 User	3 Sites
9/12/19 1:32 PM		1 User	0 Sites
9/12/19 1:31 PM		1 User	0 Sites
9/12/19 1:26 PM		1 User	0 Sites
9/12/19 1:23 PM		1 User	3 Sites

Searching and Viewing Microsoft 365 Data in x360Cloud

With x360Cloud's SmartSearch tool, you can quickly perform full-text search operations across all user accounts and connected services to find one or more objects. You can even search historical snapshots and version history. When you find what you're looking for, you can view documents and emails directly within the x360Cloud browser, without needing to download content or navigate away from the system.

Searching Best Practices

As a best practice, please consider the following when using x360Cloud's SmartSearch tool:

- x360Cloud defines data as *objects*. Objects include emails, contacts, calendars, calendar events, files, documents, and similar data.
- For fast and reliable searches, enter specific search criteria. This is especially helpful when trying to find text-heavy objects, like emails or documents.

Search Filters

In addition to utilizing the x360Cloud Search toolbar, you can also search using the following filters:

Filter by User:	This filter will segregate objects by the selected email address.
Filter by Collection:	This filter segregates objects by directory.
Filter by Type:	This filter will segregate objects by content type (document, email, event, and contact).
Filter by Date Range:	This filter allows you to select a specific <i>from</i> and <i>to</i> date range.
Filter by Snapshot:	This filter allows you to select a specific <i>snapshot</i> date.

Search Fields

You can search for x360Cloud objects using the following fields:

Email Objects:	<ul style="list-style-type: none">• sender• to• cc• content• subject• receivedDate
-----------------------	---

Contact Objects:	<ul style="list-style-type: none"> • firstName • lastName • workEmails • homeEmails • lastUpdated
Document Objects:	<ul style="list-style-type: none"> • title • authors • content • fileName • lastUpdated
Event Objects:	<ul style="list-style-type: none"> • title • lastUpdated • location • lastUpdated

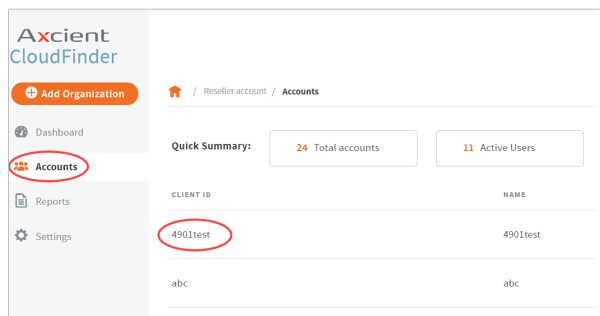
Search Syntax Examples

The following search syntax examples can help you quickly narrow your search results:

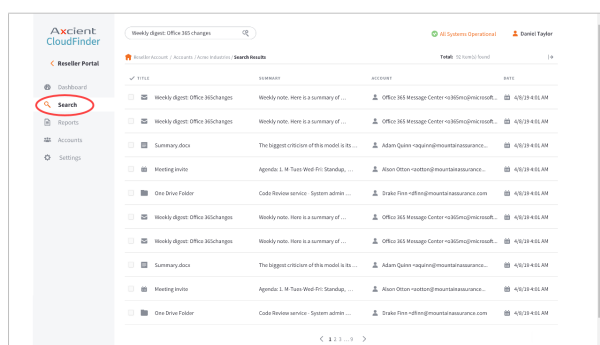
Example	Syntax
You need to find an email with the subject containing the word, <i>application</i> .	subject: application
You need to find a file within a SharePoint Document Library.	"sites/MySite/Shared Documents/"
You need to find all files within a SharePoint Site Collection.	collections: sites\MySiteCollection*
You need to search a specific field that contains one word or another.	title:(contract OR paper)
You want to search a specific field containing an exact match.	from:"John Smith"
You want to perform a relevant search but you are unsure of the spelling.	title:grene~
You want to retrieve all objects within a date range.	receivedDate:[2019-01-15 TO 2019-01-28
You want to break down the search results with very specific criteria.	financial AND document) OR (finansieel AND dokumentera) AND NOT "trouble"

To use x360Cloud's SmartSearch tool:

1. In the Reseller Portal *Accounts* page, click the **client ID** of the client account you want to manage. The client account *Dashboard* page displays, giving you access to client account details and reports.



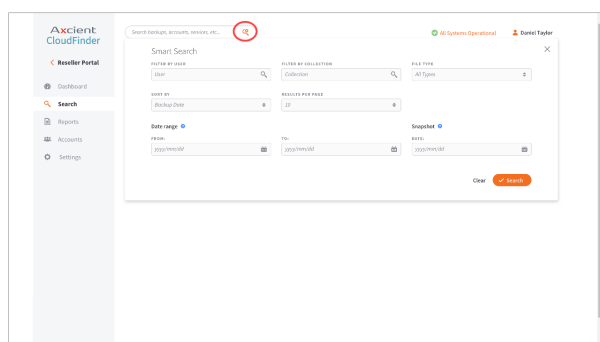
2. In the left-hand navigation menu, click the **Search** tab. The *Search* page displays, giving you access to a search toolbar and filtering options.



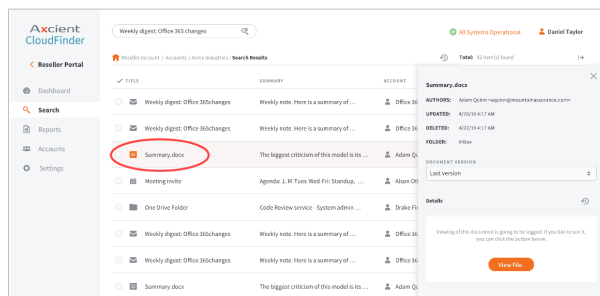
3. In the *Search* page, click the **Search** icon to open the SmartSearch toolbar. You can then use the search bar or search filters to find your data. For example, you can:

- Filter by user or collection,
- Filter by type (document, email, event, or contact),
- Filter by date range, or
- Filter by exact snapshot date.

The page will refresh to show you filtered results.

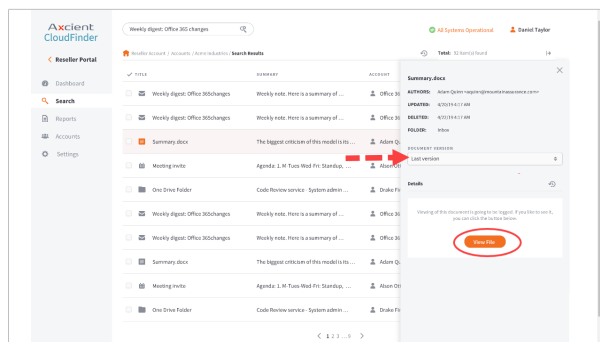


4. Click the **title** of the object you want to view. The page expands to display a right-hand browser window.



5. In the right-hand browser window, you can view metadata about the object, including name, date, and folder location.

Optionally, click the **View File** button to preview the first 1000 characters of the file or email. If this is a file, you can also use the *Version* drop-down menu to view a previous version of the file, if available. You can also restore this object. Please reference the [Restoring or Migrating Backup Data \[44\]](#) section of this guide for more information.



Searching and Viewing G Suite Data in x360Cloud

With x360Cloud's SmartSearch tool, you can quickly perform full-text search operations to find one or more G Suite objects. When you find what you're looking for, you can view items directly within the x360Cloud browser, without needing to download content or navigate away from the system.

Searching Best Practices

As a best practice, please consider the following when using x360Cloud's SmartSearch tool:

- x360Cloud defines data as *objects*. Objects include emails, contacts, calendars, calendar events, files, documents, and similar data.

- For fast and reliable searches, enter specific search criteria. This is especially helpful when trying to find text-heavy objects, like emails or documents.

Search Filters

In addition to utilizing the x360Cloud Search toolbar, you can also search using the following filters:

Filter by User:	Use this filter to find email addresses or Shared Drives. Search by Shared Drive name or ID.
Filter by Collection:	Use this filter to find Shared Drive folders. Search by folder path (case sensitive). For example: <i>folder/subfolder</i> .
Filter by Type:	Use this filter to segregate objects by content type (document, email, event, and contact).
Filter by Date Range:	Use this filter to select a specific <i>from</i> and <i>to</i> date range.
Filter by Snapshot:	Use this filter to select a specific <i>snapshot</i> date.

Search Fields

You can search for G Suite objects using the following fields:

Email Objects:	<ul style="list-style-type: none">• sender• to• cc• content• subject• receivedDate
Contact Objects:	<ul style="list-style-type: none">• firstName• lastName• workEmails• homeEmails• lastUpdated
Document Objects:	<ul style="list-style-type: none">• title• authors• content• fileName• lastUpdated
Event Objects:	<ul style="list-style-type: none">• title• lastUpdated• location• lastUpdated

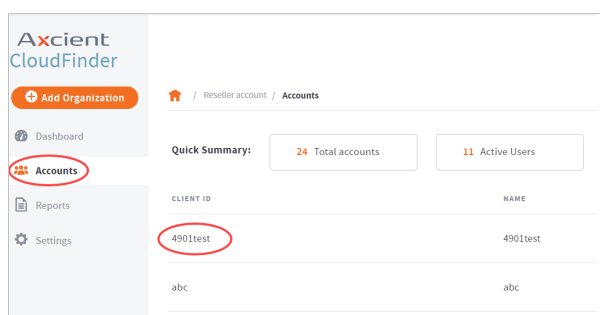
Search Syntax Examples

The following search syntax examples can help you quickly narrow your search results:

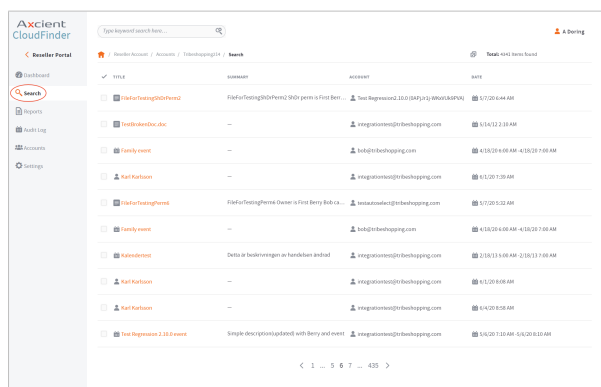
Example	Syntax
You need to find an email with the subject containing the word, <i>application</i> .	subject: application
You need to find a file within a Shared Drive.	"myfolder/mysubfolder/"
You need to search a specific field that contains one word or another.	title:(contract OR paper)
You want to search a specific field containing an exact match.	from:"John Smith"
You want to perform a relevant search but you are unsure of the spelling.	title:grene~
You want to retrieve all objects within a date range.	receivedDate:[2019-01-15 TO 2019-01-28
You want to break down the search results with very specific criteria.	financial AND document) OR (finansiell AND dokumentera) AND NOT "trouble"

To find G Suite data using x360Cloud SmartSearch tool:

1. In the Reseller Portal *Accounts* page, click the **client ID** of the client account you want to manage. The client account *Dashboard* page displays, giving you access to client account details and reports.



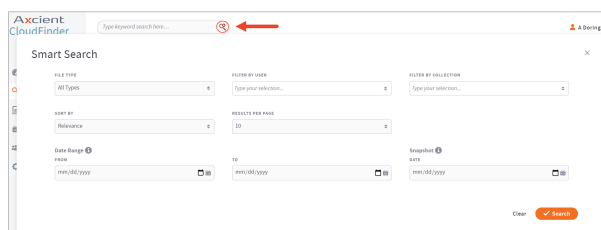
2. In the left-hand navigation menu, click the **Search** tab. The *Search* page displays, giving you access to a search toolbar and filtering options.



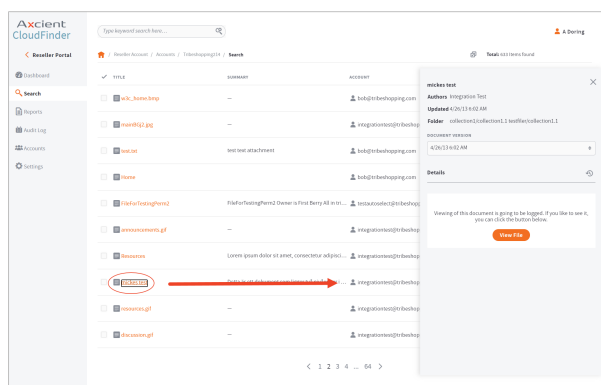
3. In the **Search** page, click the **Search** icon to open the SmartSearch toolbar. You can then use the search bar or search filters to find your data. For example, you can:

- Filter by user or Shared Drive,
- Filter by type (document, email, event, or contact),
- Filter by date range, or
- Filter by exact snapshot date.

The page will refresh to show you filtered results.

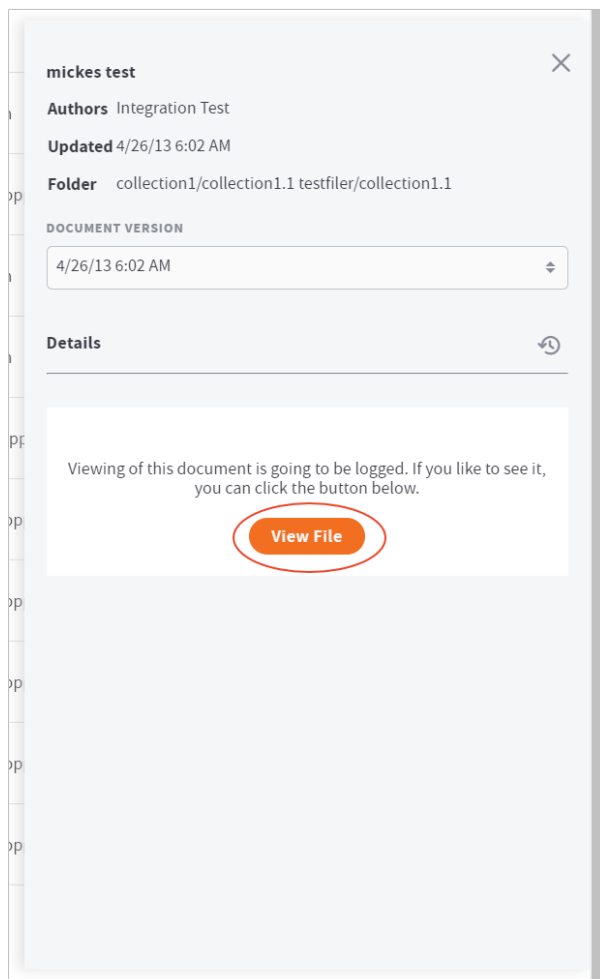


4. Click the **title** of the object you want to view. The page expands to display a right-hand browser window.



5. In the right-hand browser window, you can view metadata about the object, including name, date, and folder location.

Optionally, click the **View File** button to preview the first 1000 characters of the file or email. If this is a file, you can also use the *Version* drop-down menu to view a previous version of the file, if available. You can also restore this object. Please reference the [Restoring or Migrating Backup Data \[44\]](#) section of this guide for more information.



Restoring or Migrating Backup Objects

After using the x360Cloud SmartSearch tool to find a backup object, you can optionally perform restore or migration operations on this object.

For example, you can restore or migrate the following object types:

- Document (for example, from a SharePoint Document Library, OneDrive, or Shared Drive)
- Email

- Event
- Contact

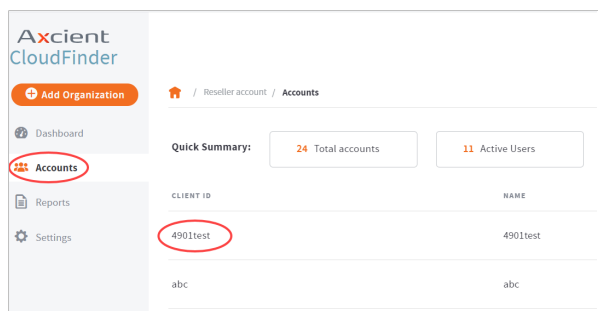


NOTE

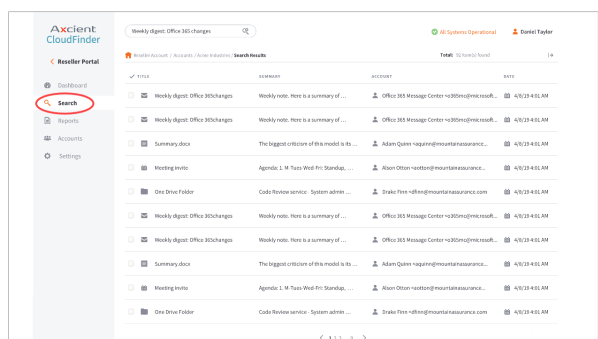
Nested folders need to be restored individually.

To restore backup data:

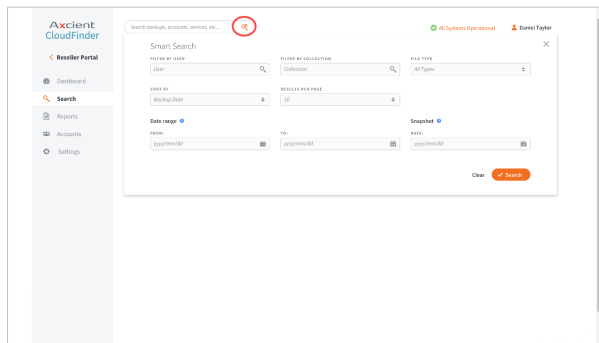
1. In the Reseller Portal *Accounts* page, click the **client ID** of the client account you want to manage. The client account *Dashboard* page displays, giving you access to client account details and reports.



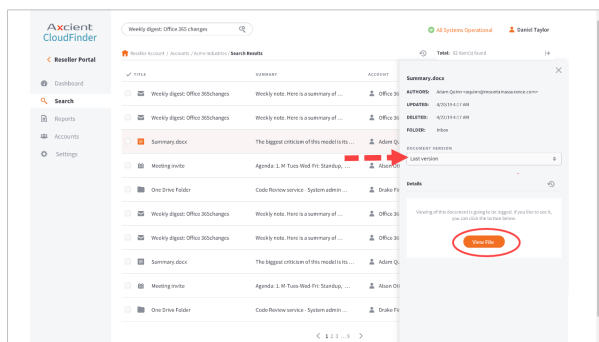
2. In the left-hand navigation menu, click the **Search** tab. The *Search* page displays, giving you access to a search toolbar and filtering options.



3. In the *Search* page, use the filters to find your data. For more information on searching best practices, please reference the [Searching and Viewing in x360Cloud \[37\]](#) section of this guide.



4. Optionally, click the **View File** button to preview the first 1000 characters of the file or email. If this is a document, you can also use the *Version* drop-down menu to view a previous version of the file, if available.



If you cannot view the details of a file, you might need to turn on Content Visibility settings. For instructions, please reference the [Configuring Client Account Settings \[17\]](#) section of this guide.

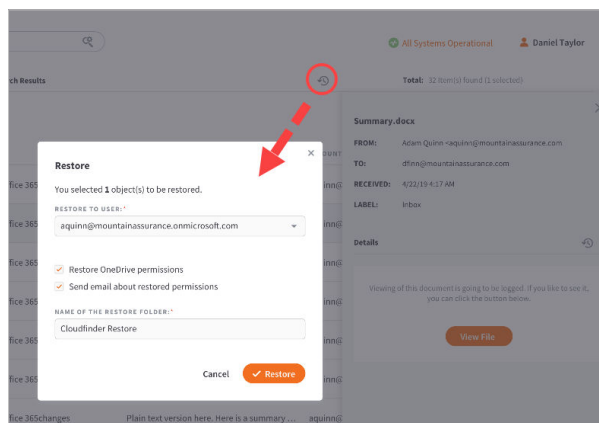


NOTE

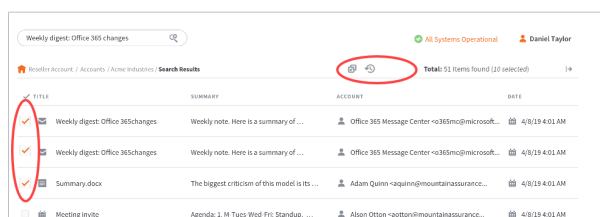
In certain instances, you might not be able to view the content of very large backup objects. You can still, however, view metadata if needed.

5. Optionally, click the **Restore** button to restore the object to the same user account or a different user account. A *Restore* pop-up window displays, allowing you to select your restore preferences:
 - a. Click the **Restore to User** drop-down menu and select the **user account** where this item will be restored.
 - b. Optionally, use the checkboxes to restore permissions. For example, if this is a Microsoft OneDrive file, click the **Restore OneDrive Permissions** check-

- box to recover permission settings. Or, if this is a G Suite Shared Drive file, click the **Restore Sharing Permission** checkbox to recover permission for another collaborator.
- Optionally, click the **Send Email About Restored Permissions** checkbox to alert the affected user.
 - In the *Name of the Restore Folder* field, enter the **name of the folder** where this item will be recovered.
 - Click the **Restore** button to complete the restore process.



- You can also manage multiple items at one time. Using the checkboxes, select all items that you want to manage and then click the **Restore** button to restore all selected items.

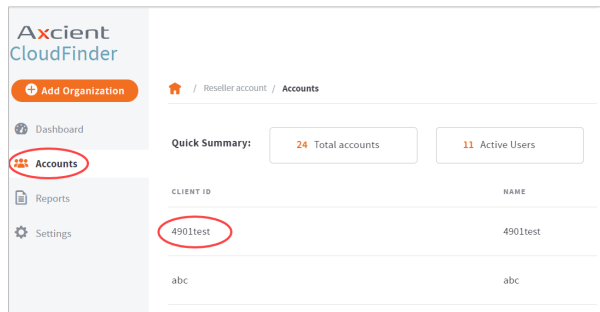


Restoring or Migrating End User Accounts

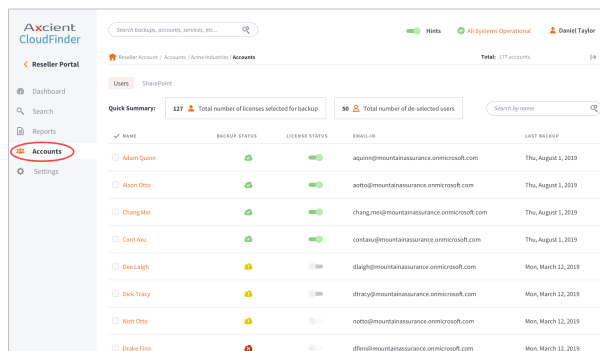
In addition to restoring, migrating, or deleting individual objects, you can also restore or migrate an entire end user account. This process is useful if an entire end user account has been lost, or if an end user account needs to be completely migrated to a different account.

To restore or migrate end user accounts:

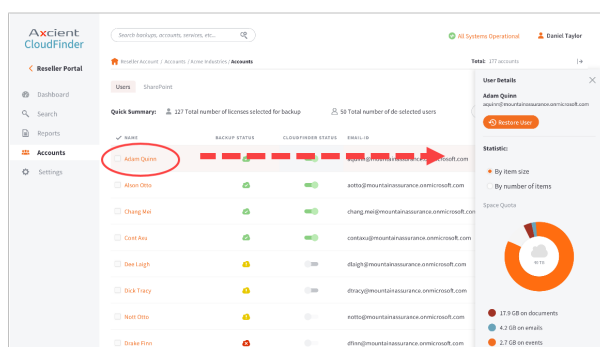
1. In the Reseller Portal *Accounts* page, click the **client ID** of the client account you want to manage. The client account *Dashboard* page displays, giving you access to client account details and reports.



2. In the left-hand navigation menu, click the **Accounts** tab. The *Accounts* page displays, giving you access to advanced end user management tools.

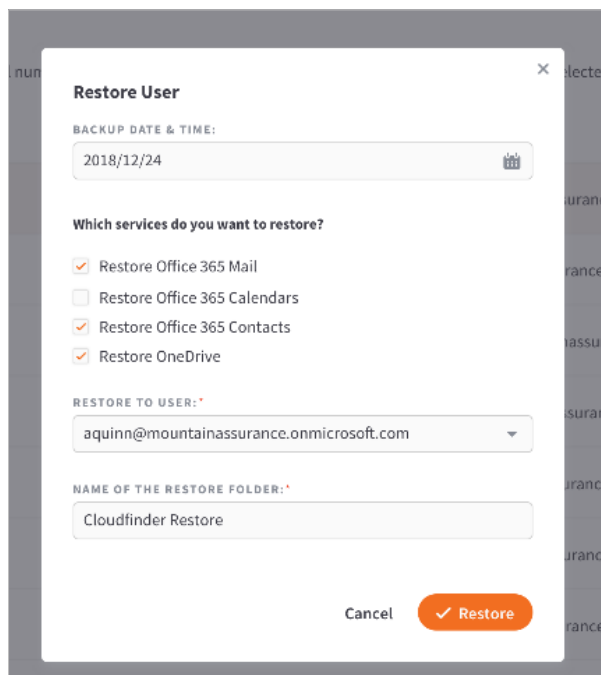


3. In the *Search* bar, search for the end user you want to manage. Then, in the left-hand results window, click the name of the end user you want to manage. End user details will display in the right-hand browser window.



4. Optionally, in the right-hand browser window, click the **Restore** button to restore end user backup data to the same user or a different end user account. In the *Restore User* pop-up window, select your restore options:
 - a. In the *Backup Date and Time* drop-down menu, select the **snapshot** you want to restore.

- b. In the *Which Services do you Want to Restore* section, click the **checkboxes** to select which items should be restored.
- c. In the *Restore to User* drop-down menu, select the **end user account** where this data will be restored. You can select the same end user or a different end user account.
- d. In the *Name of the Restore Folder* field, type the **name of the folder** where the restored data will reside.
- e. Click the **Restore** button to complete the process.



The screenshot shows a 'Restore User' dialog box with the following fields and options:

- BACKUP DATE & TIME:** A date picker showing '2018/12/24'.
- Which services do you want to restore?** A list of four services with checkboxes:
 - ☒ Restore Office 365 Mail
 - ☐ Restore Office 365 Calendars
 - ☒ Restore Office 365 Contacts
 - ☒ Restore OneDrive
- RESTORE TO USER:** A dropdown menu showing 'aquinn@mountainassurance.onmicrosoft.com'.
- NAME OF THE RESTORE FOLDER:** A text input field containing 'Cloudfinder Restore'.
- Buttons:** 'Cancel' and 'Restore' (with a checkmark icon).

Monitoring x360Cloud

As an x360Cloud administrator, you are responsible for monitoring the health of client account backups. You can do this using x360Cloud reports and Audit Logs. This section of the guide will review monitoring tasks, including:

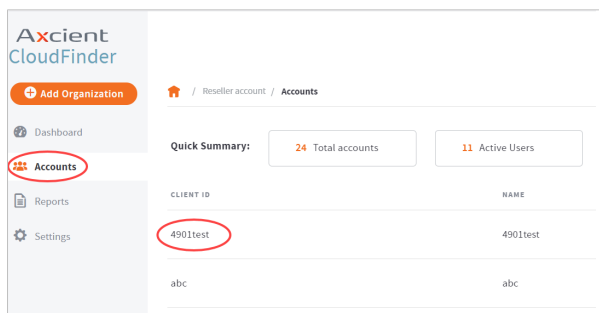
- Viewing reports in the Reports page,
- Downloading the Backup Report,
- Viewing Audit Logs, and
- Exporting Audit Logs.

Viewing Reports in the Reports Page

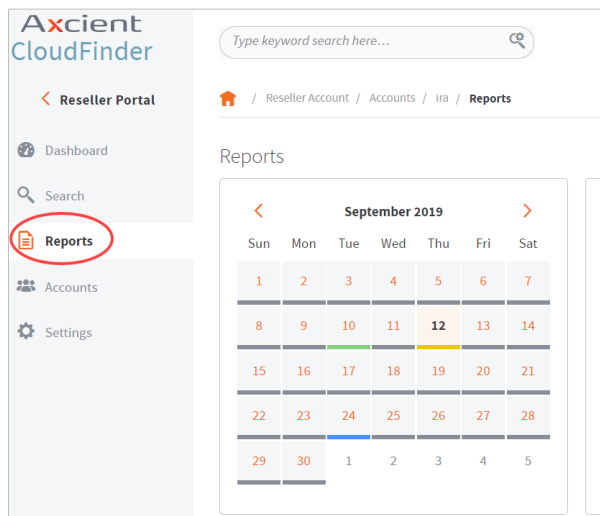
You can view reports to help manage backup status so that you can quickly address problems before they arise. These reports give you detailed insight into activity that occurs in the system.

To view reports:

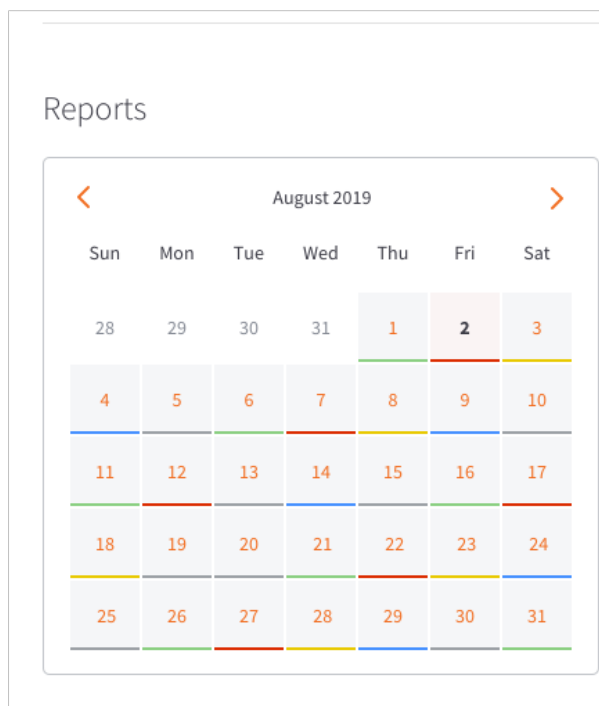
1. In the Reseller Portal *Accounts* page, click the **client ID** of the client account you want to manage. The client account *Dashboard* page displays, giving you access to client account details and reports.



2. Click the **Reports** tab. The *Reports* page displays, giving you access to reporting tools.

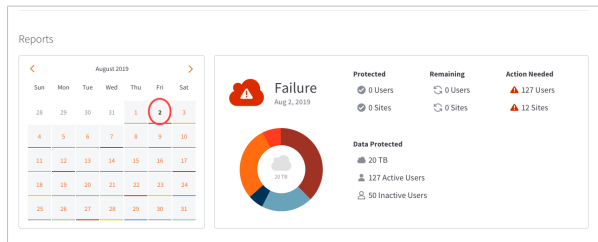


3. Within the *Reports* page, you can use the color-coded Reports calendar to quickly view the health of backups:
- Green indicates a *successful* backup.
 - Blue indicates *in progress* backups.
 - Yellow indicates *warnings*.
 - Red indicates *failures*.



4. Click a **day** on a calendar. You will see details related to:
- Backup status,
 - Protected items (for example, users and sites),
 - Remaining items, and

- d. Any actions that might need to be taken.






5. In the *All Users* section, click each **subtab** to view the status of backups. This section will change based on the service you are backing up. For example, if you are backing up a Microsoft 365 service:
- a. Click the **Users** tab to view the username of the end user account and the backup status of the end user account (*in progress*, *success*, *warning*, or *failure*).

All Users	
Users	Sites
USERNAME	STATUS
Vlad@axcient.com	
John@axcient.com	
Framirez@axcient.com	
Mleon@axcient.com	





- b. Click the **Sites** subtab to view the status of SharePoint site backups. This report allows you to view the name of the site, the URL of the site, and the backup status of the site (*in progress*, *success*, *warning*, or *failure*).

All Users		
Users	Sites	
SITES	SITE URL	STATUS
Community	http://advisetecsupport.sharepoint.com	
TeamShare	http://mountainassurance.onmicrosoft.com	
Leadership	http://advisetecsupport.sharepoint.com	
TeamSite	http://mountainassurance.onmicrosoft.com	

6. Alternatively, if you are backing up a G Suite service:
- a. Click the **Users** tab to view the username of the end user account and the backup status of the end user account (*in progress*, *success*, *warning*, or *failure*).

All G Suite users	
G Suite users	Shared drives
USERNAME	STATUS
bob@tribeshopping.com	
testautoselect@tribeshopping.com	
integrationtest@tribeshopping.com	

- b. Click the **Shared Drives** subtab to view the status of Shared Drive backups. This report allows you to view the name of the site, the URL of the site, and the backup status of the site (*in progress*, *success*, *warning*, or *failure*).

All G Suite users		
G Suite users	Shared drives	
SHARED DRIVE NAME	SHARED DRIVE ID	STATUS
eyue123123	0AJgdAFjP-meUk9PVA	
TestR	0AFb8BfiamOBz2uk9PVA	
Test Regression2.10.0	0APjJr1j-WKwVuk9PVA	
bnEyle	0AD4o9HyocJ6OUk9PVA	



NOTE

Each Backup report represents the status of backups performed within 24 hours prior to the report.



NOTE

A failed report does not indicate that backups are corrupt or in an invalid state. A failed report simply indicates that x360Cloud did not back up data from the past 24 hours.

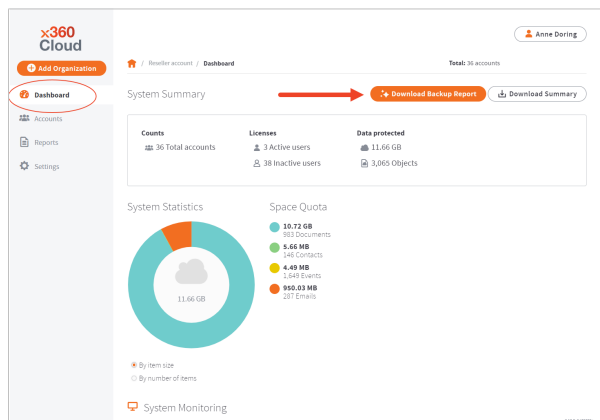
Downloading the Backup Report

You can generate and download a Backup Report to view the status of backups for a specific organization. For example, the Backup Report includes:

- A list of end user accounts for each service selected for backup (Mail, Calendar, Contacts, OneDrive).
- SharePoint sites being backed up (if configured).
- Error messages explaining the root cause and potential troubleshooting steps for the most common errors encountered in the system.

To view the Backup Report:

1. In the Reseller Portal, click the **Dashboard** tab. The *Dashboard* page displays, giving you access to system summary information.
2. In the *Dashboard* page, click the **Download Backup Report** button.



3. In the *Download Backup Report* pop-up window, select the organization you want to view. Then, click the **Download** button.

The screenshot shows a 'Download Backup Report' pop-up window. It has a title bar with a close button (X). Below the title, there is a section labeled 'ORGANIZATION' with a dropdown menu currently showing 'Adoring Inc'. At the bottom of the window are two buttons: 'Cancel' and 'Download' (which is highlighted in orange and has a checkmark icon).

The report will download as an Excel file. The date of the report is reflected in the file name.

4. Open the Excel file and review backup and error details.

Organization name						
3	4	5	6	7	8	9
Account	Account by Error code (and subcode)	Error message		Description		
afolder	houn@quakeassurance.onmicrosoft.com	no	AUTH_FAILURE_002	The permissions for CloudFinder Azure app have been Please contact chisupport@efolder.net to get		
afolder	kate@quakeassurance.onmicrosoft.com	no				
contacts	houn@quakeassurance.onmicrosoft.com	no				
contacts	kate@quakeassurance.onmicrosoft.com	no				
mail	houn@quakeassurance.onmicrosoft.com	no				
mail	kate@quakeassurance.onmicrosoft.com	no				
onedrive20	houn@quakeassurance.onmicrosoft.com	no				
onedrive20	kate@quakeassurance.onmicrosoft.com	no				
sharepoint20	https://quakeassurance.sharepoint.com	no	INVALID_CONFIG_4001	Sharepoint URL in CloudFinder is missing or invalid CloudFinder cannot back up your Sharepoint		
sharepoint20	https://quakeassurance.sharepoint.com	no	INVALID_CONFIG_4001	Sharepoint URL in CloudFinder is missing or invalid CloudFinder cannot back up your Sharepoint		



NOTE

This report takes into account all backup attempts performed within 24 hours prior to the report generation.

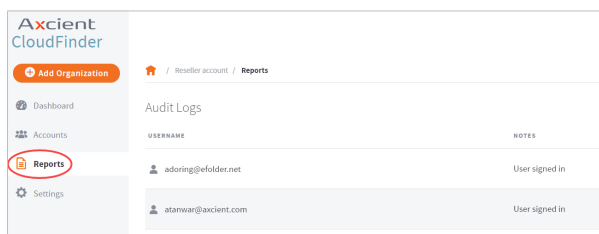
Viewing Audit Logs

In the Reseller Portal, you can view a list of historical activities that occurred in the x360Cloud system. Events that are captured in the Audit Logs include:

- Search,
- Restore,
- User sign in and sign out,
- Deletion of objects and their versions, and
- User updated organization settings.







To view audit logs:

1. In the Reseller Portal, click the **Reports** tab.

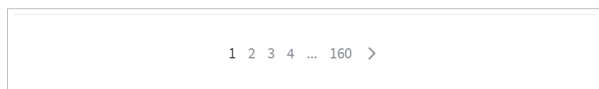


2. In the *Reports* page, use the *Audit Log* panel to view important events that have occurred in the system. For example, you can view events related to:
 - a. Search,
 - b. Restore,
 - c. User sign in and sign out,

- d. Deletion of objects and their versions, and
- e. User updated organization settings.

	User signed in	03/03/2020 01:03 PM
	User signed in	03/03/2020 12:42 PM
	User signed in	03/03/2020 12:34 PM
	User signed in	03/03/2020 11:37 AM
	User signed in	03/03/2020 10:26 AM
	User searched for objects by query	03/03/2020 09:17 AM

3. Optionally, use the navigation panel to view historical data.

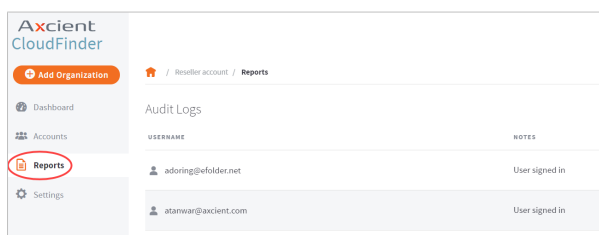


Exporting Audit Logs

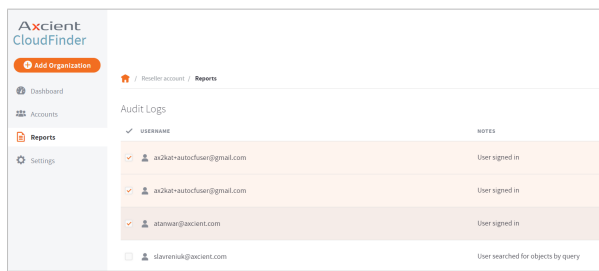
After you review Audit Logs in the Reseller Portal, you can optionally export specific log entries to your local machine. You can even download files in .xlsx format, giving you access to native Microsoft Excel filtering tools to help you view and sort log entries.

To export Audit Logs:

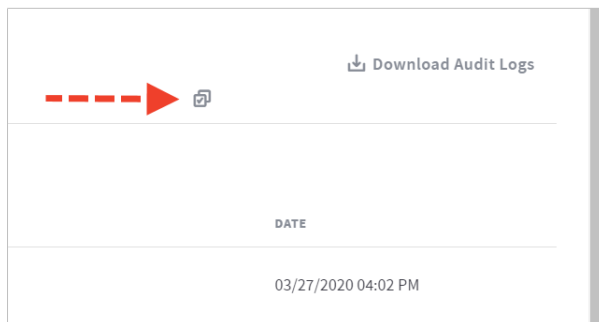
1. In the Reseller Portal, click the **Reports** tab.



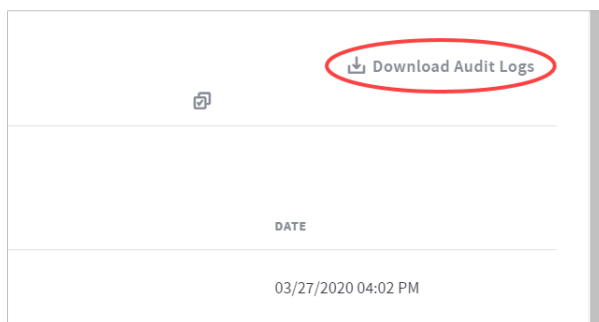
2. In the *Reports* page, click the **checkboxes** adjacent to the log entries you want to export.



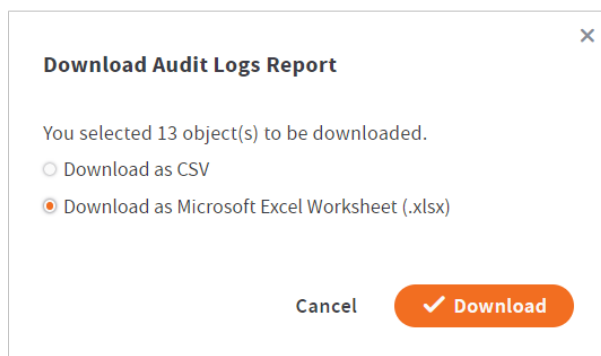
3. Alternatively, click the **Select All** button to select all log entries in the Audit Log.



4. When all appropriate log entries are selected, click the **Download Audit Logs** button.



5. In the *Download Audit Logs Report* dialog box, select your preferred output file:
- Click the **Download as CSV** radio button to download your preferred file in .csv format.
 - Click the **Download as Microsoft Excel Worksheet** radio button to download your file in .xlsx file format. When you select this option, you can utilize native Microsoft Excel filtering tools to help you view and sort information.



6. Click the **Download** button to download the selected file.

Integrating with ConnectWise

ConnectWise is a Professional Services Automation (PSA) platform for companies that sell, service, and support technology. You can optionally integrate this platform with x360Cloud so that tickets are automatically created in ConnectWise when an organization has not generated a backup within a 24 hour period.

To integrate x360Cloud with ConnectWise, you need to complete the following tasks:

- Create an API Member and generate API Keys.
- Specify service defaults for the API Member.
- Configure a new PSA system in x360Cloud.
- Turn on ticketing in x360Cloud.



IMPORTANT

A ticket will automatically be created in ConnectWise Manage PSA if an organization does not successfully generate a backup within a 24 hour period.

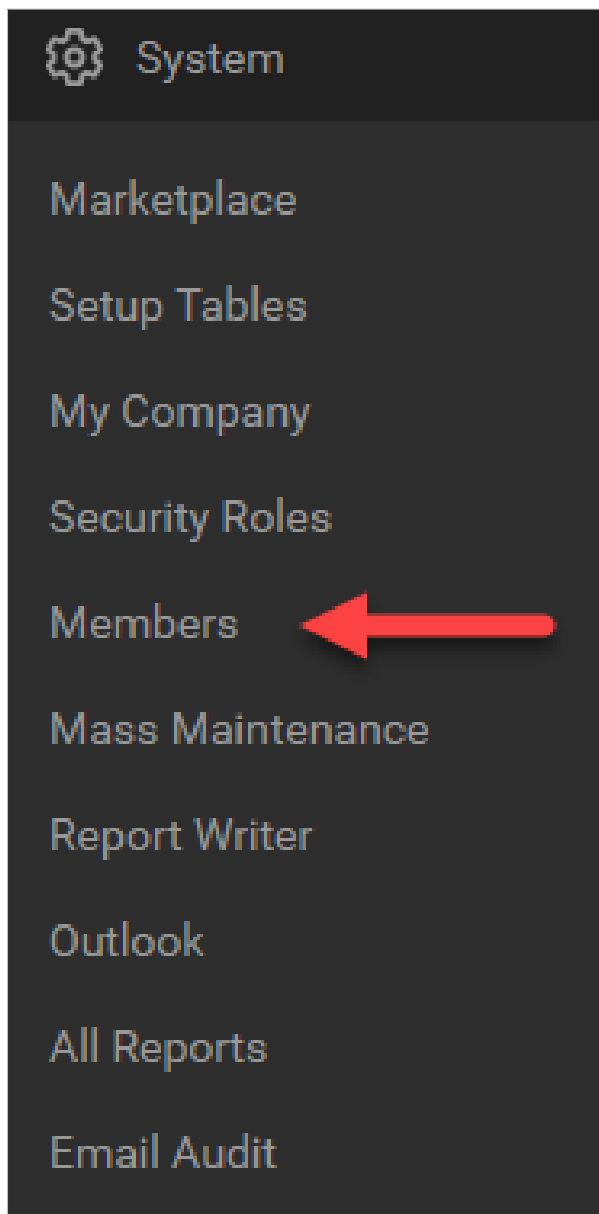
Currently, tickets from all organizations are created under a single company in ConnectWise (the company will be created automatically). In future releases, you will have the ability to map organizations for improved management.

Creating an API Member and API Keys in ConnectWise

As a first step, you need to create an API Member and API Keys in ConnectWise.

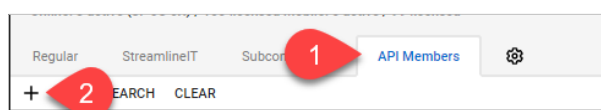
To create an API Member and generate API Keys:

1. Log in to ConnectWise and open the *System* menu.
2. In the *System* menu, click the **Members** link.



3. In the *Members* page, click the **API Members** tab and then click the **plus** icon to create a new API Member:
 - a. In the *Member ID* field, enter **Axcient**.
 - b. In the *Role ID* field, select **Admin**.

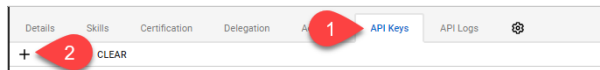
Note: The role must be set to **Admin** to ensure tickets are properly generated.



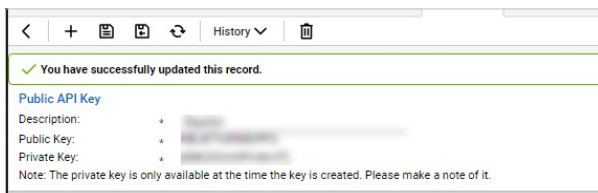
4. Click the **Save** button but do not close the window. After you click the **Save** button, you will be given access to the *API Keys* tab.



5. Click the **API Keys** tab and then click the **plus** icon to create a new API key:
 - a. In the *Description* field, type **x360Cloud**.
 - b. Click the **Save** button but do not close the window.



6. Record the *public key* and *private key* before you close the window. You will not be able to view the private key again after this window is closed.

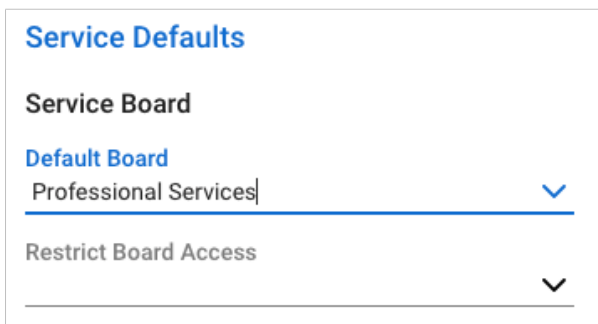


Specify Service Defaults

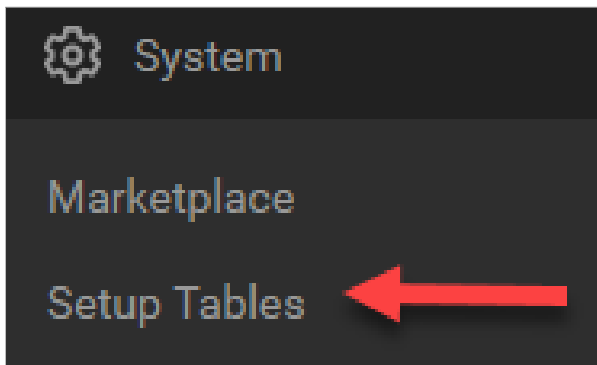
After you create an API Member and API Keys, you will need to specify service defaults.

To specify service defaults:

1. In ConnectWise, specify a default **Service Board** for the newly created API Member. This board will be used when tickets are pushed from x360Cloud.



2. In the *System* menu, click the **Setup Tables** link and navigate to the Service Board list.



3. In the *Service Board* page, click the **Board** tab and select the **Service Board** you set as the default Service Board above.

A screenshot of a web application showing the 'Service Board' configuration page. The breadcrumb trail is 'Setup Tables > Service Board List > Service Board'. The page has tabs for 'Board', 'Statuses', 'Types', 'Subtypes', 'Items', 'Auto Templates', 'Teams', 'Standard Notes', and 'Member Acc'. The 'Board' tab is active. Below the tabs is a navigation bar with icons for back, add, edit, refresh, and a 'Marketplace' button, followed by a 'HISTORY' dropdown and a trash icon. The main content area is titled 'Board Details' and 'Service Overview'. It contains several form fields: 'Board Name*' with the value 'Professional Services' and an 'Inactive' checkbox; 'Location*' with a dropdown menu showing 'Tampa Office' and a 'Mark first note as Issue' checkbox; 'Business Unit*' with a dropdown menu showing 'Professional Services'; and 'Sign Off Template*' with a dropdown menu showing 'Default Signoff Template'.

4. Click the **Statuses** tab and select a **default status** to be used for each new ticket generated from x360Cloud.
5. Click the **Default** checkbox to ensure this status is saved as the default status.

A screenshot of a web application showing the 'Status' configuration page. The breadcrumb trail is 'Setup Tables > Service Board List > Status List > Status'. The page has tabs for 'Board', 'Statuses', 'Types', 'Subtypes', 'Items', 'Auto Templates', and 'Teams'. The 'Statuses' tab is active. Below the tabs is a navigation bar with icons for back, add, edit, refresh, and a 'HISTORY' dropdown, followed by a trash icon. The main content area is titled 'Status Details' and 'Status Overview'. It contains several form fields: 'Status Description*' with the value 'New (not responded)' and an 'Inactive' checkbox; 'Escalation Status' with a dropdown menu showing 'We have NOT responded.' and a 'Default' checkbox that is checked; 'Sort Order' with a value of '10'; and 'Board' with a dropdown menu showing 'Professional Services'.

6. Click the **Teams** tab and select a default **team**.

Service Team List

Board

Statuses

Types

Subtypes

Items

Auto Templates

Teams

<

+

SEARCH

CLEAR

Service Team ^

Team Leader

Default

Notify Email

Default CF Team

Training Admin1

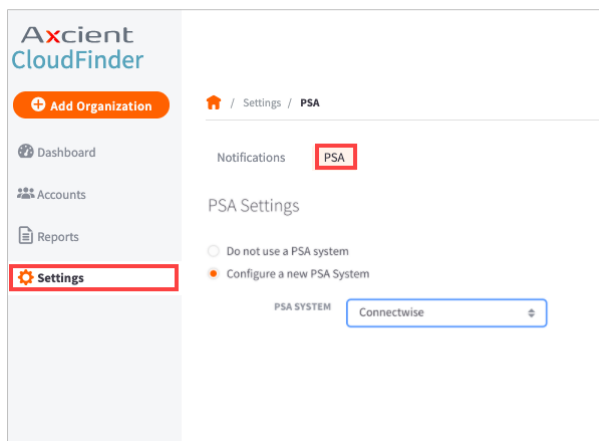
✓

Configure PSA Settings in x360Cloud

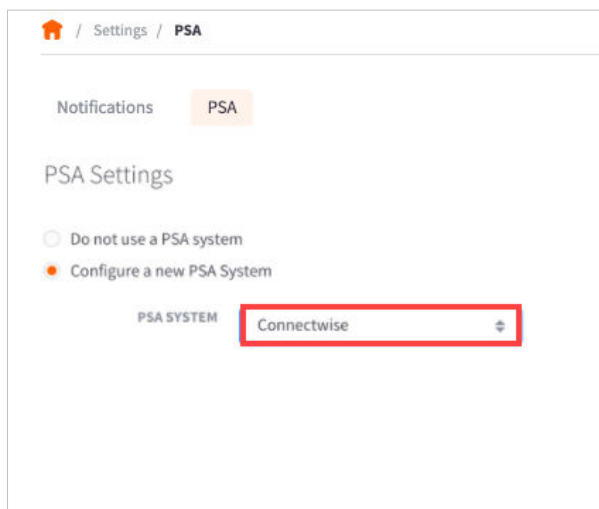
After API Member and service default settings are configured in ConnectWise, you need to configure PSA settings in x360Cloud.

To configure PSA settings in x360Cloud:

1. In the *Reseller Portal*, click the **Settings** tab and then click the **PSA** tab.

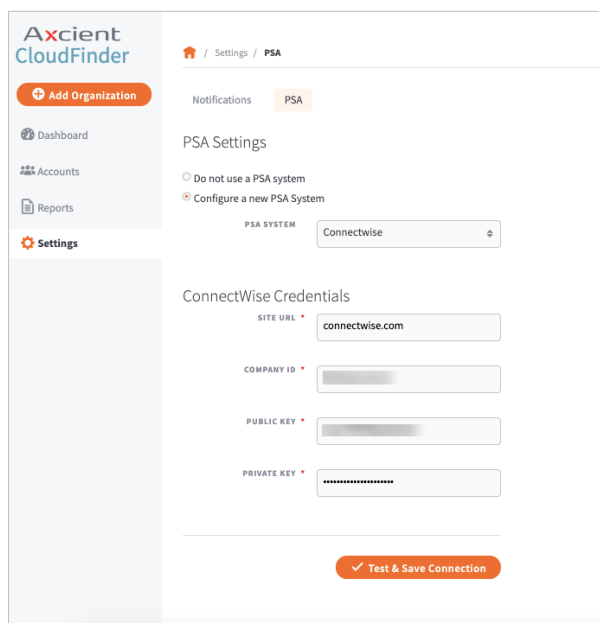


2. In the *PSA* tab, click the **Configure a new PSA System** radio button.



3. In the *PSA* drop-down menu, select **ConnectWise**.

4. In the *ConnectWise Credentials* section, configure settings for your ConnectWise account:
 - a. In the *Site URL* field, enter your **ConnectWise URL**.
 - b. In the *Company ID* field, enter the **ID** of your company.
 - c. In the *Public Key* field, enter the **public key** generated for your API Member.
 - d. In the *Private Key* field, enter the **private key** for your API Member.
 - e. Click the **Test & Save Connection** button when you are finished.



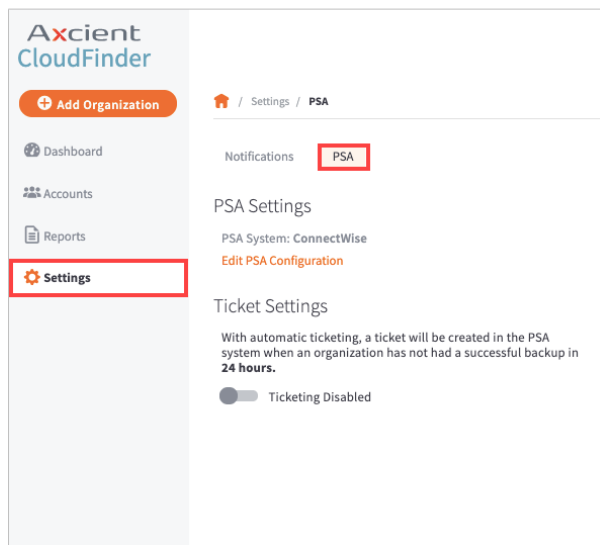
The screenshot shows the Axcient CloudFinder interface. On the left is a sidebar with navigation links: Add Organization, Dashboard, Accounts, Reports, and Settings (highlighted). The main content area is titled 'Settings / PSA'. It has two tabs: 'Notifications' and 'PSA' (selected). Under 'PSA Settings', there are two radio buttons: 'Do not use a PSA system' and 'Configure a new PSA System' (selected). Below this is a dropdown menu for 'PSA SYSTEM' with 'Connectwise' selected. The 'ConnectWise Credentials' section contains four input fields: 'SITE URL' (filled with 'connectwise.com'), 'COMPANY ID' (blurred), 'PUBLIC KEY' (blurred), and 'PRIVATE KEY' (filled with asterisks). At the bottom is an orange button labeled 'Test & Save Connection'.

Configure Ticket Settings

After you configure PSA settings, you can turn on ticketing.

To configure ticket settings in x360Cloud:

1. In the *Reseller Portal*, click the **Settings** tab and then click the **PSA** tab.



2. In the **PSA** tab, turn on ticketing:
 - Click **Ticketing Enabled** to turn on ticketing.
 - Click the **Save** button when you are finished.

