

Acronis

Acronis Data Cloud Version 7.5

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1 About this document

This document is intended for partner administrators who want to use Acronis Data Cloud to provide services to their clients.

This document describes how to set up and manage the services available in Acronis Data Cloud.

2 About Acronis Data Cloud

Acronis Data Cloud is a cloud platform that enables service providers, resellers, and distributors to deliver data protection services to their partners and customers.

The services are provided at the partner level, down to the customer company level and the end-user level.

The services management is available through web applications called the service consoles. The tenant and user account management is available through a web application called the management portal.

The management portal enables administrators to:

- monitor the services usage and access the service consoles
- manage tenants
- manage user accounts
- configure services and quotas for tenants
- manage storage
- manage branding
- generate reports about the services usage

2.1 Services and offerings

Services

The following services are available in Acronis Data Cloud:

- **Backup & Disaster Recovery**
- **File Sync & Share**

Depending on the settings chosen by your service provider, some of the services may be unavailable to you. Contact your service provider for more information.

Offerings

Acronis Data Cloud enables service providers to customize the offering (the set of services and service features, called offering items) that they deliver to their customers and partners.

The offering defines which services and functionality will be available in the management portal and the service consoles to the partners, customers, and their end users. All functionality that is excluded from the offering will be hidden from them.

To further refine their offerings, the service providers can define quotas for the specific offering items.

2.2 User accounts and tenants

There are two user account types: administrator accounts and user accounts.

- **Administrators** have access to the management portal. They have the administrator role in all services.
- **Users** do not have access to the management portal. Their access to the services and their roles in the services are defined by an administrator.

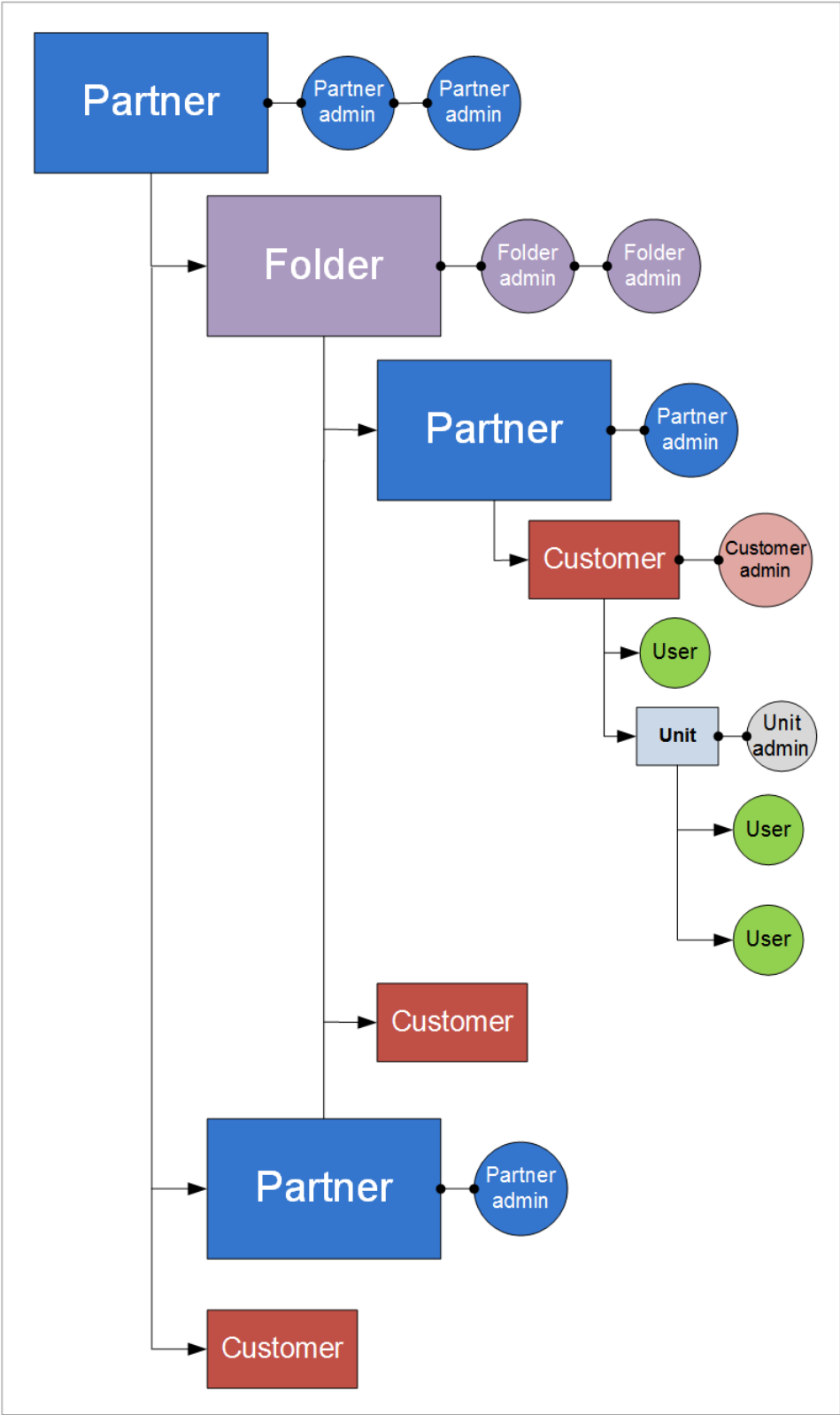
Each account belongs to a tenant. A tenant is a part of the management portal resources (such as user accounts and child tenants) and service offerings (enabled services and offering items within them) dedicated to partner or a customer. The tenant hierarchy is supposed to match the client/vendor relationships between the service users and providers.

- A tenant type of **Partner** typically corresponds to service providers that resell the services.
- A tenant type of **Folder** is a supplementary tenant that is typically used by partner administrators to group partners and customers to configure separate offerings and/or different branding.
- A tenant type of **Customer** typically corresponds to organizations that use the services.
- A tenant type of **Unit** typically corresponds to units or departments within the organization.

An administrator can create and manage tenants, administrator accounts, and user accounts on or below their level in the hierarchy.

Administrators at the customer level and higher can limit access to their tenant for higher-level administrators (p. 15).

The following diagram illustrates an example hierarchy of the partner, folder, customer, and unit tenants.



The following table summarizes operations that can be performed by the administrators and users.

Operation	Users	Customer and unit administrators	Partner and folder administrators
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Operation	Users	Customer and unit administrators	Partner and folder administrators
Create tenants	No	Yes	Yes
Create accounts	No	Yes	Yes
Download and install the software	Yes	Yes	No*
Manage services	Yes	Yes	Yes
Create reports about the service usage	No	Yes	Yes
Configure branding	No	No	Yes

*A partner administrator who needs to perform these operations can create a customer administrator or user account for themselves.

2.3 Supported web browsers

The web interface supports the following web browsers:

- Google Chrome 29 or later
- Mozilla Firefox 23 or later
- Opera 16 or later
- Windows Internet Explorer 10 or later
- Microsoft Edge 25 or later
- Safari 8 or later running in the OS X and iOS operating systems

In other web browsers (including Safari browsers running in other operating systems), the user interface might be displayed incorrectly or some functions may be unavailable.

3 Using the management portal

The following steps will guide you through the basic use of the management portal.

3.1 Activating the administrator account

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 the administrator account. Remember the login that is shown on the account activation page.
- **A link to the login page.** The login and password are the same as in the previous step.

3.2 Accessing the management portal

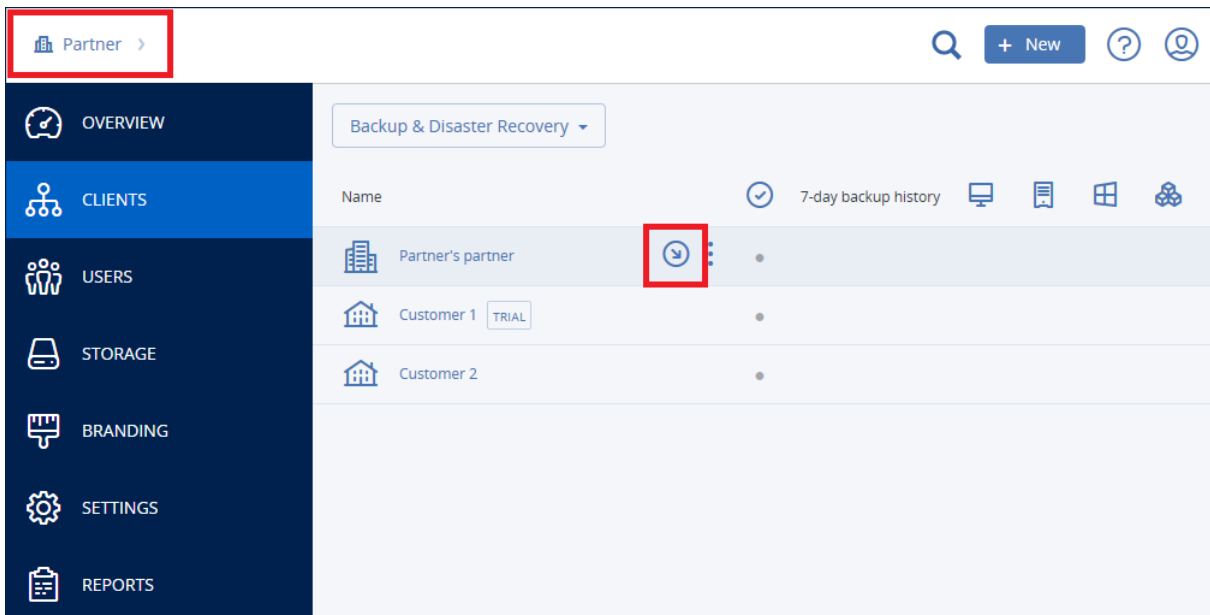
1. Go to the service login page. The login page address was included in the activation email message.
2. Type the login, and then click **Continue**.
3. Type the password, and then click **Sign in**.
4. Click **Management Portal**.

Some services include the capability to switch to the management portal from the service console.

3.3 Navigation in the management portal

When using the management portal, at any given time you are operating within a tenant. This is indicated in the top-left corner.

By default, the top-most hierarchy level available to you is selected. The arrow button enables you to drill down the hierarchy. To navigate back to an upper level, click its name in the top-left corner.

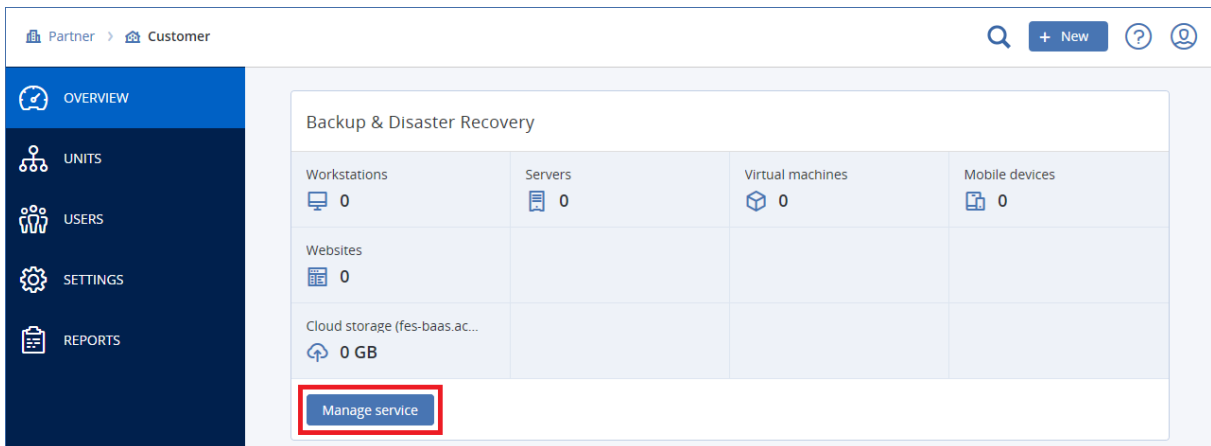


All parts of the user interface display and affect only the tenant in which you are currently operating. For example:

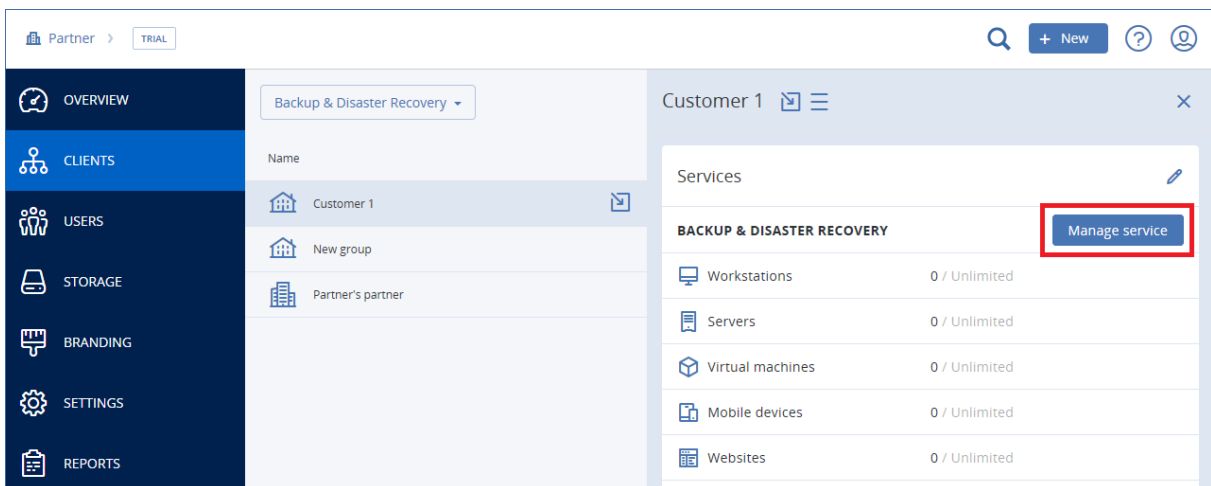
- The **Clients** tab displays only the tenants that are direct children of the tenant in which you are currently operating.
- The **Users** tab displays only the user accounts that exist in the tenant in which you are currently operating.
For the convenience of user account management:
 - For partner tenants, the user accounts that exist in their child folder tenants are also shown.
 - For customer tenants, the user accounts that exist in their child unit tenants are also shown.
- By using the **New** button, you can create a tenant or a new user account only in the tenant in which you are currently operating.

3.4 Accessing the services

The **Overview** tab provides an overview of the service usage and enables you to access the services within the tenant in which you are operating.



The **Clients** tab displays the child tenants of the tenant in which you are operating and enables you to access the services within them.



To manage a service for a tenant

1. Do one of the following:
 - Navigate to the tenant (p. 7) for which you want to manage a service, and then click **Overview**.
 - Click **Clients**, and then select the tenant for which you want to manage a service.

Note that some services can be managed at the partner tenant and at the customer tenant levels, while other services can be managed only at the customer tenant level.

2. Find the service that you want to manage, and then click **Manage service** next to the service name.

As a result, the service web interface opens in a new browser tab.

For information about using the services, refer to the user guides that are available in the service consoles.

3.5 Creating a tenant

A **Partner** tenant is normally created for each partner that signs the partnership agreement.

A **Folder** tenant is normally created to group partners and customers to configure separate offerings and/or different branding.

A **Customer** tenant is normally created for each organization that signs up for a service.

You may want to create a new **Unit** tenant within a customer tenant when expanding the service to a new organizational unit.

To create a tenant

1. Log in to the management portal.
2. Navigate to the tenant (p. 7) in which you want to create a tenant.
3. In the top-right corner, click **New**, and then click one of the following, depending on the type of the tenant that you want to create:
 - **Customer**
 - **Partner**
 - **Folder**
 - **Unit**

The available types depend on the parent tenant type.

4. In **Name**, specify a name for the new tenant.
5. [Only when creating a customer tenant] In **Mode**, select whether the tenant is using services in the trial mode or in the production mode. Monthly service usage reports do not include usage data for trial-mode tenants.

Important *If you switch the mode from trial to production in the middle of a month, the entire month will be included in the monthly service usage report. For this reason, we recommend that you switch the mode on the first day of a month. The mode is automatically switched to production when a tenant remains in the trial mode for one full month.*

6. [Optional] In **Language**, change the default language of notifications, reports, and the software that will be used within this tenant.
7. Do one of the following:
 - To finish the tenant creation, click **Save and close**. In this case, all services will be *disabled* for the tenant. The tenant will not have an administrator until you create one.
 - To configure services for the tenant and to create a tenant administrator, click **Next**.
8. [Optional, not applicable to a unit tenant] Configure the offering for the tenant:
 - a. Clear the check boxes for the services that you want to disable. Disabled services will be hidden from the users within the tenant and its child tenants.
 - b. Within each service, clear the check boxes for the offering items that you want to disable. The functionality that corresponds to the disabled offering items will be hidden from the users within the tenant and its child tenants.
 - c. Some services enable you to select storages that will be available to the new tenant. You can select from the list of storages that are available to your tenant.
 - When creating a parent/folder tenant, you can select multiple storages for each service.
 - When creating a customer tenant, you must select one storage per service. This storage cannot be changed after the tenant is created.

For more information about storages, refer to "Managing storage" (p. 11).

- d. Click the pencil icon next to an offering item to specify the quota for the item. These quotas are "soft." If any of these values are exceeded, an email notification is sent to the tenant administrators and the administrators of the parent tenant. Restrictions on using the services are not applied.
 - e. [Only when creating a customer tenant] Specify the quota overages. An overage allows a customer tenant to exceed the quota by the specified value. When the overage is exceeded, restrictions on using the corresponding service are applied.
9. Do one of the following:
- To create a tenant administrator, click **Next**, and then follow the steps described in "Creating a user account" (p. 10), starting from step 4. If you change your mind, you can click **Skip and close** to cancel creating an administrator.
 - To create a tenant without an administrator, click **Save and close**. You can add administrators to the tenant later.

The newly created tenant appears on the **Clients** tab.

If you want to edit the tenant settings or specify the contact information, select the tenant on the **Clients** tab, and then click the pencil icon in the section that you want to edit.

3.6 Creating a user account

You may want to create additional accounts in the following cases:

- Partner/folder administrator accounts — to share the services management duties with other people.
- Customer/unit administrator accounts — to delegate the service management to other people whose access permissions will be strictly limited to the corresponding customer/unit.
- User accounts within the customer or a unit tenant — to enable the users to access only a subset of the services.

Please be aware that existing accounts cannot be moved between tenants. First, you need to create a tenant, and then populate it with accounts.

To create a user account

1. Log in to the management portal.
2. Navigate to the tenant (p. 7) in which you want to create a user account.
3. In the top-right corner, click **New > User**.
4. Specify the following contact information for the account:
 - **Email address**
 - [Optional] **First name**
 - [Optional] **Last name**
 - [Optional] To specify a login that is different from the specified email address, clear the **Use email address as login** check box, and then specify the login.

Important Each account must have a unique login.

5. [Optional] In **Language**, change the default language of notifications, reports, and the software that will be used for this account.
6. [Not available when creating an account in a partner/folder tenant] Select the services to which the user will have access and the roles in each service.

Available services depend on the services that are enabled for the tenant in which the user account is created.

- If you select the **Company administrator** check box, the user will have access to the management portal and the administrator role in all services that are currently enabled for the tenant. The user will also have the administrator role in all services that will be enabled for the tenant in the future.
- If you select the **Unit administrator** check box, the user will have access to the management portal, but may or not have the service administrator role, depending on the service.
- Otherwise, the user will have the roles that you select in the services that you select.

7. Click **Create**.

The newly created user account appears on the **Users** tab.

If you want to edit the user settings or specify notification settings and quotas (not available for partner/folder administrators) for the user, select the user on the **Users** tab, and then click the pencil icon in the section that you want to edit.

3.7 Managing storage

The **Storage** tab shows the backup storages that you can use to provide the **Backup & Disaster Recovery** service to your partners and customers.

Storages configured for other services will be shown on the **Storage** tab in the future releases.

Choosing storage for partners and customers

When creating a partner/folder tenant (p. 9), you can select multiple storages that will be available in the new tenant for each service.

When creating a customer tenant (p. 9), you must select one storage per service that will be assigned to the new customer. These storages cannot be changed at a later time.

The information about the storages that are assigned to a customer tenant is shown on the customer details panel when the tenant is selected on the **Clients** tab. Information about the storage space usage is not updated in real time. Please allow up to 24 hours for the information to be updated.

Adding new storages

- **Backup & Disaster Recovery** service. By default, the backup storages are located in Acronis data centers. Service providers can organize storages in their own data centers, by using the Acronis Storage software. Click **Add storage** on the **Storage** tab to find information about organizing a backup storage in your own data center.
- For information about adding storages that will be used by other services, contact Acronis technical support at <http://www.acronis.com/support>.

3.8 Configuring branding

The **Branding** tab enables partner administrators to customize the user interface of the management portal and the **Backup & Disaster Recovery** service to remove any association with Acronis or the higher-level partners.

Branding can be configured on the partner and the folder levels. The branding is applied to all direct and indirect child partners/folders and customers of the tenant where the branding is configured.

The capability to configure branding for all services will be available in the future releases. Some services provide separate branding capability. For more information, refer to the user guides that are available in the service consoles.

Branding items

The following items can be branded:

- **Logo.** The logo is displayed in the management portal and the services. Click the logo to upload an image file.
- **Color scheme.** The color scheme defines the combination of colors that is used for all user interface elements. Click the scheme, and then choose one of the predefined schemes that best fits your needs.
- **Company name.** The company name is shown when a user clicks the question mark icon in the top-right corner, and then clicks **About**.
- **Service name.** This name is used in all email messages that are sent by the management portal (account activation messages, business notification email messages) and on the **Welcome** screen after the first login to the management portal.
- **Home URL.** This page is opened when a user clicks the company name on the **About** panel.
- **Support URL.** This page is opened when a user clicks the **Contact support** link on the **About** panel or in an email message that is sent by the management portal.
- **Support phone.** This phone number is shown on the **About** panel.
- **Knowledge base URL.** This page is opened when a user clicks the **Knowledge base** link in an error message.
- **End-user License agreement (EULA) URL.** This page is opened when a user clicks the **End-user license agreement** link on the **About** panel or on the **Welcome** screen after the first login to the management portal.
- **Platform terms URL.** This page is opened when a partner administrator clicks the **Platform terms** link on the **About** panel or the **Welcome** screen after the first login to the management portal.
- **Management portal admin guide.** This page is opened when a user clicks the question mark icon in the top-right corner of the management portal user interface, and then clicks **About > Administrator guide**.
- **Management portal admin help.** This page is opened when a user clicks the question mark icon in the top-right corner of the management portal user interface, and then clicks **Help**.
- **Mobile apps:**
 - **App Store.** This page is opened when the user clicks **Add > iOS** in the **Backup & Disaster Recovery** service.
 - **Google Play.** This page is opened when the user clicks **Add > Android** in the **Backup & Disaster Recovery** service.
- **Email server settings.** You can specify a custom email server that will be used to send email notifications from the management portal and the services. To specify a custom email server, change **Default** to **Custom**, and then specify the following settings:
 - In **Sender properties > From**, enter the name that will be shown in the **From** field of the email notifications.
 - In **Sender properties > SMTP**, enter the name of the outgoing mail server (SMTP).
 - In **Sender properties > Port**, enter the port of the outgoing mail server. By default, the port is set to 25.

- In **Sender properties > Encryption**, select whether to use SSL or TLS encryption. Select **None** to disable encryption.
- In **Credentials > User name** and **Password**, specify the credentials of an account that will be used to send messages.

Configuring branding

1. Log in to the management portal.
2. Navigate to the tenant (p. 7) in which you want to configure branding.
3. Click **Branding**.
4. Enable the **Branding** switch.
5. Do one of the following:
 - Configure the branding items described above.
 - Click **White label** to clear all branding items, except for **Service name**, **End-user License agreement (EULA) URL**, **Management portal administrator guide**, **Management portal administrator help**, and **Email server settings**.
 - Click **Default settings** to reset all branding items to their default values.

3.9 Generating reports

Usage reports provide historical data about use of the services.

Report type

You can select one of the following report types:

- **Current usage**
The report contains the current service usage metrics.
The usage metrics are calculated within each of the child tenants' billing periods. If the tenants included in the report have different billing periods, the parent tenant's usage may differ from the sum of the child tenants' usages.
- **Current usage distribution**
This report is available only for partner tenants that are managed by an external provisioning system. This report is useful when the billing periods of child tenants do not match the billing period of the parent tenant. The report contains the service usage metrics for child tenants calculated within the current billing period of the parent tenant. The parent tenant's usage is guaranteed to be equal to the sum of the child tenants' usages.
- **Summary for period**
The report contains the service usage metrics for the end of the specified period, and the difference between the metrics in the beginning and at the end of the specified period.
- **Day-by-day for period**
The report contains the service usage metrics and their changes for each day of the specified period.

Report scope

You can select the scope of the report from the following values:

- **Direct customers and partners**
The report will include the service usage metrics only for the immediate child tenants of the tenant in which you are operating.

- **All customers and partners**

The report will include the service usage metrics for all child tenants of the tenant in which you are operating.

- **All customers, partners, and users**

The report will include the service usage metrics for all child tenants of the tenant in which you are operating and for all users within the tenants.

Scheduled reports

A scheduled report covers service usage metrics for the last full calendar month. The reports are generated at 23:59:59 by UTC time on the first day of a month and sent on the second day of that month to all administrators of your tenant.

To enable or disable a scheduled report

1. Log in to the management portal.
2. Ensure that you operate in the top-most tenant available to you.
3. Click **Reports**.
4. Click **Scheduled**.
5. Select or clear the **Send a monthly summary** report check box.
6. In **Level of detail**, select the report scope as described above.

Custom reports

This type of report can be generated on demand and cannot be scheduled. The report will be sent to your email address.

To generate a custom report

1. Log in to the management portal.
2. Navigate to the tenant (p. 7) for which you want to create a report.
3. Click **Reports**.
4. Select the **Custom** tab.
5. In **Type**, select the report type as described above.
6. [Not available for the **Current usage** report type] In **Period**, select the reporting period:
 - **Current calendar month**
 - **Previous calendar month**
 - **Custom**
7. [Not available for the **Current usage** report type] If you want to specify a custom reporting period, select the start and the end dates. Otherwise, skip this step.
8. In **Level of detail**, select the report scope as described above.
9. To generate the report, click **Generate and send**.

4 Advanced scenarios

4.1 Moving a tenant to another tenant

The management portal enables you to move a tenant from one parent tenant to another parent tenant. This may be useful if you want to transfer a customer from one partner to another partner,

or if you created a folder tenant to organize your clients and want to move some of them to the newly created folder tenant.

Restrictions

- A partner/folder tenant can be moved only to a partner/folder tenant.
- A customer tenant can be moved only to a partner/folder tenant.
- A tenant cannot be moved to its child tenant.
- A unit tenant cannot be moved.
- A tenant can be moved only if the target parent tenant has the same or a larger set of services and offering items as the original parent tenant.
- When moving a customer tenant, all storages assigned to the customer tenant in the original parent tenant must exist in the target parent tenant. This is required because the customer service-related data cannot be moved from one storage to another storage.

How to move a tenant

1. Log in to the management portal.
2. On the **Clients** tab, select the target tenant to which you want to move a tenant.
3. On the tenant properties panel, click the vertical ellipsis icon, and then click **View ID**.
4. Copy the text string shown in the **Internal ID** field, and then click **Cancel**.
5. On the **Clients** tab, select the tenant which you want to move.
6. On the tenant properties panel, click the vertical ellipsis icon, and then click **Move**.
7. Paste the internal identifier of the target tenant, and then click **Move**.

4.2 Limiting access to the web interface

Administrators can limit access to the web interface by specifying a list of IP addresses from which the members of a tenant are allowed to log in.

This restriction applies only at the level where it is set. It is *not* applied to the members of the child tenants.

To limit access to the web interface

1. Log in to the management portal.
2. Navigate to the tenant (p. 7) in which you want to limit the access.
3. Click **Settings > Security**.
4. Select the **Enable logon control** check box.
5. In **Allowed IP addresses**, specify the allowed IP addresses.
You can enter any of the following parameters, separated by a semicolon:
 - IP addresses, for example: 192.0.2.0
 - IP ranges, for example: 192.0.2.0-192.0.2.255
 - Subnets, for example: 192.0.2.0/24
6. Click **Save**.

4.3 Limiting access to your tenant

Administrators at the customer level and higher can limit access to their tenants for higher-level administrators.

If access to the tenant is limited, the parent tenant administrators can only modify the tenant properties. They do not see the accounts and child tenants at all.

To prevent higher-level administrators from accessing your tenant

1. Log in to the management portal.
2. Click **Settings > Security**.
3. Clear the **Allow administrators from parent tenants to manage this tenant** check box.
4. Click **Save**.

4.4 Integration with third-party systems

Acronis Data Cloud enables service providers to configure integration with a variety of third-party Professional Services Automations (PSA) and Remote Monitoring and Management (RMM) systems.

To configure integration with a third-party system

1. Log in to the management portal.
2. Click **Settings > Integration**.
3. Click the name of the system with which you want to enable the integration.
4. Follow the on-screen instructions.

More information about integration with third-party systems is available in the integration references section on the Acronis website.