

# Connected Backup

Software Version 9.0

Bulk Data Retrieve Tool



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# Chapter 1: Get started

Using the Bulk Data Retrieve Tool, you can retrieve backed up files from multiple Micro Focus Connected Backup accounts autonomously.

The BDRT reads a CSV file to determine the accounts and specific files you want to retrieve. A Connected Backup PC Agent is silently installed on the local machine and retrieves the necessary files. The BDRT retrieves the tip version of all files according to a date that you define. The retrieved files are placed in a location you define, organized by account. When retrieval is completed, the Agent is automatically uninstalled.

The BDRT can only be used by a Support Center Technician with “Access Users’ Data” permission. Your Connected Backup administrator defines this permission in the Support Center, under **Connected > Technician**.

When getting started with the BDRT, complete the following:

1. Review the README.
2. [Configure the Connected Backup PC Agent](#). Download the Agent Setup file (AgentSetup.msi).
3. Create one or more [CSV files](#) that define the accounts and files to be retrieved.
4. [Retrieve data](#).

## Support matrix

The host machine for the BDRT must meet the following requirements.

- Must meet all requirements for a Connected Backup PC Agent.
- Must not have any Connected Backup Agents already installed and running.
- Sufficient disk space to hold all of the files to be retrieved.
- Microsoft Outlook client installed if retrieving Exchange archive files (PST).
- IBM Notes client installed if retrieving Notes archive files (NSF).

## About Connected Backup

The Connected Backup lets you back up and restore enterprise data on end user’s desktops and laptops. Protect enterprise data through scheduled and automated backups that run silently in the background while users work. Simplify and streamline organizational data migration during PC refresh.

Backed up files are stored in a centralized location giving users access to their business critical information. Connected Backup uses advanced encryption and other security technologies to safeguard enterprise data at all times, including during transmission, storage, and recovery.

# Chapter 2: Connected Backup PC Agent configuration

Before you can use the BDRT, you must configure the Connected Backup PC Agent and download the Agent Setup file. The BDRT uses these configurations in conjunction with the Agent Setup to retrieve the desired files. Configure the Agent in the highest-level community that includes all of the accounts for which you want to retrieve files.

Complete the following steps to configure the Agent and download the Agent Setup file:

1. [Create Agent settings](#) for the BDRT.
2. [Create an Agent configuration](#) for the BDRT.
3. [Download the Agent Setup file](#).

You will need to complete this entire process for each Data Center that hosts accounts for which you want to retrieve backed up files. The Agent configuration and resulting Agent Setup file are specific to a Data Center.

For detailed information about configuring Agents, see the *Connected Backup Administering PC Agents guide*.

## Create Agent settings

Create Agent settings to define which features are accessible to the Agent used by the BDRT.

**NOTE:**

When creating the Agent settings, make the selections exactly as defined in this procedure.

### To create new Agent settings for the BDRT

1. Open the Connected Backup Support Center.
2. In the left panel, expand the highest level community that includes all of the accounts for which you want to retrieve files.
3. Under the expanded community, click **Configurations > PC > Agent Settings**.

In the right panel, click **CREATE**.

The Create Agent Settings - General page opens.

4. Complete the General information.

Option	Description
Name	Enter a unique, meaningful name for the new settings, such as <b>BDRT</b> .
Description	(Optional) Enter a meaningful description for the new settings.

Click **Next**.

The Create Agent Settings - Display Options page opens.

5. Complete the Display options.

Section	Description
Deployment Visibility	Clear all checkboxes in this section.
Messages	Clear all checkboxes in this section.
Agent Visibility	Clear all checkboxes in this section.
Connected EmailOptimizer	Select <b>Prompt for password until the user responds. If the user cancels this prompt, do not back up the Lotus Notes or Microsoft Outlook file.</b>

Click **Next**.

The Create Agent Settings - Backup page opens.

6. Complete the Backup options.

Section	Description
Backup Type	Select <b>Perform data only backups</b> .
Backup Mode	Select <b>Passive mode - if a scheduled backup cannot start, sleep until the next scheduled or manual attempt.</b>
File Scans	Select <b>Disable filter driver - scan files each backup (recommended for systems that generate more than 10% new or modified files per day).</b>
Backup Limits	Clear all checkboxes in this section.
Permissions	Clear all checkboxes in this section.

Click **Next**.

The Create Agent Settings - Schedule page opens.

7. Complete the Schedule options.

Section	Description
Backup Schedule	Select <b>Do not backup automatically; user will initiate backups.</b> <b>IMPORTANT:</b> This selection ensures that actions taken by the BDRT do not conflict with normal scheduled backups.
Permissions	Select <b>Allow user to edit the backup schedule.</b>

Click **Next**.

The Create Agent Settings - Retrieve/Heal page opens.

8. Complete the Retrieve/Heal options.

Section	Description
Permissions	Select <b>Do not require password to retrieve.</b> Clear the <b>Allow account access on mobile devices</b> checkbox.

Click **Next**.

The Create Agent Settings - Proxy Server page opens.

9. (Optional) Complete the Proxy Server options as appropriate for your environment.
10. Click **Finish**.

The BDRT-specific Agent settings is saved and displays in the left panel under Agent Settings.

## Create Agent configuration

Create an Agent configuration specific to the BDRT.

### To create a new Agent configuration for the BDRT

1. Open the Connected Backup Support Center.
2. Expand the community under which you created the BDRT-specific Agent Settings.
3. Under the expanded community, click **Configurations > PC**.

In the right panel, click **CREATE**.

The Create PC Agent Configuration page opens.

4. Complete the Agent configuration options.

Option	Description
Name	Enter a unique, meaningful name for the new configuration, such as <b>BDRT Configuration</b> .
Description	(Optional) Enter a meaningful description for the new settings.
Agent Version	Select the highest version currently in your environment. <b>NOTE:</b> The BDRT requires an Agent version 8.8.6 or later. If you plan to retrieve files to a flat folder structure (do not maintain original folder structure) you must use an Agent version 8.8.7 or later.
Agent Settings	Select the setting you created for the BDRT.
Profile & Website Settings	Accept the default selection.
Agent Rule Set	Accept the default selection.

5. Click **Save and Deploy**.

The BDRT-specific Agent configurations is saved and displays in the left panel under PC.

A **DOWNLOAD** button displays at the top of the right panel. Continue to [download the Agent Setup file](#).

## Download the Agent Setup file

Once the BDRT-specific Agent Configuration is completed, you can download the Agent Setup file. You must download the Agent Setup file to the BDRT host machine, where it will be used by the BDRT.

After downloading the Agent Setup file, proceed to [Bulk data retrieval](#).

### To download the Agent Setup file

1. Open the Connected Backup Support Center.
2. Expand the community under which you created the BDRT-specific Agent Settings.
3. Under the expanded community, click **Configurations > PC > yourBDRTconfiguration**.

In the right panel, click **DOWNLOAD**.

The Download Agent Setup page opens.

4. Click **Download**.

Save the file (`AgentSetup.msi`) to the desired location on the BDRT host machine. You will then define this location when you use the tool to retrieve data.

# Chapter 3: CSV file

The BDRT reads a CSV file to determine the Connected Backup accounts and files to be retrieved. The CSV requires a specific format with each account defined on a separate line.

```
accountNumber,[fileExtensionOrPath]...[fileExtensionOrPath]
```

where

- `accountNumber` is a valid nine-digit Connected Backup account number.  
Supports one `accountNumber` per line.
- `filePathOrExtension` is the file extension or fully qualified path (on the account holder's machine) to the files to be retrieved. `filePathOrExtension` is optional. If not defined, all files for the account are retrieved.  
Supports none, one, or multiple `filePathOrExtension` per line. Separate multiple extensions or paths with a comma.

## Example

```
101001387,C:\Users\johnsmithDocuments\  
101001489,C:\Users\janedoe\Desktop\file.zip,C:\Users\janedoe\Desktop\projects\  
101000387,jpg,pdf  
101008964
```

- For account 101001387, all files in the defined folder are retrieved.
- For account 101001489, the defined ZIP file and all files in the defined folder are retrieved.
- For account 101000387, all JPG and PDF files are retrieved.
- For account 101008964, all files for this account are retrieved.

## CSV Considerations

When creating your CSV files, you must consider the following:

- The Data Center on which the Connected Backup accounts are hosted. All accounts defined in a given CSV must belong to the same Data Center.
- The number of accounts being retrieved. Micro Focus recommends to define a maximum of 25 accounts in each CSV file. If the expected total file size on disk is significant, you may want to reduce the number of accounts defined in the individual CSV files.
- The total expected data size on disk being retrieved. The retrieved data size should not exceed the available disk space on the BDRT host machine.

- The location of the CSV file. The CSV file can be saved on the BDRT host machine (recommended), or in a network location accessible to the machine on which you will run the BDRT.

## Create the CSV file

Before you use the BDRT, you must create one or more CSV files that define the account and files you want to retrieve. The number of CSV files you create depends on the number of accounts, the size of the data to be retrieved, and the Data Centers on which the accounts are hosted.

### IMPORTANT:

All accounts in a given CSV must belong to the same Connected Backup Data Center.

The CSV file can be saved on the BDRT host machine (recommended), or in a network location accessible to the machine on which you will run the BDRT

### To create the CSV file

1. Open a text editing application, such as Notepad.
2. Defining one account per line, enter the nine-digit account number and the file information to be retrieved.

Use the format `accountNumber,fileExtensionOrPath...fileExtensionOrPath`.

If you do not enter file information, all files for the defined account are retrieved.

**TIP:** `fileExtensionOrPath` is the file extension or fully qualified path (on the account holder's machine) to the files to be retrieved. Separate multiple extensions or paths with a comma.

3. Save the file as a CSV file.

# Chapter 4: Bulk data retrieval

Using the BDRT, you can retrieve files for multiple Connected Backup accounts. You can run the tool as needed to retrieve the necessary files. Once retrieval is complete, you can view the files from the defined location.

If you chose to cancel the retrieval before it completes, processing may not stop immediately. The BDRT stops after it finishes the processing stage in progress. No further processing takes place and the Agent is uninstalled.

## Before you begin

Before you use the BDRT, you must create directories used by the tool.

- Create a directory where the retrieved files will be placed. The directory can be on the machine hosting the BDRT (recommended) or on a network accessible machine. During retrieval, sub-folders are automatically created for each account being retrieved.

Micro Focus recommends that you keep this directory as close to the root of the drive as possible to avoid exceeding the maximum character limit for file paths. This is especially important if you choose to retain the folder structure of the files being retrieved.

- Optionally, create a directory to temporarily hold the EMO constituent files. The directory can be on the machine hosting the BDRT (recommended) or on a network accessible machine.

If you do not create this directory, do not define an EMO path when you run the BDRT—EMO files will be placed in the local default working directory.

## Retrieve data

Use the BDRT to retrieve backed up files for multiple Connected Backup accounts.

**CAUTION:** When defining criteria in the tool, ensure your entries are accurate.

- The tool does not validate file paths.
- File paths are case sensitive.

If an invalid path is encountered, the location is skipped and the next path is processed. You can review the BDRT log file (`BulkDataRetrieveLog.log`) as needed.

**To retrieve backed up data for multiple accounts**

1. Open the BDRT.
2. Define your Technician credentials.

Criterion	Description
Technician ID	Enter your Connected Backup Technician ID. You must have "Access Users' Data" permission to use this tool.
Password	Enter your Connected Backup Technician password.

3. Define the Account and File Selection Criteria.

Criterion	Description
Account specification file	Enter or browse to the location of the CSV file. The CSV file contains information about the accounts and files to be retrieved.
As of date	Select the "as of" date for file collection. BDRT retrieves the latest version (tip version) of the files as they existed on the defined date.

4. Define the Retrieve Target Criteria.

Criterion	Description
Retrieve Path	Enter or browse to the directory you created to hold the retrieved files. Must be a fully qualified path. A subfolder is automatically created for each account defined in the CSV file. <b>IMPORTANT:</b> Do not include a trailing backslash (\) in the path entry.
Maintain original folder structure	Select to maintain original folder structure during retrieval. If not selected, the original folder structure is flattened and all files for each defined account are placed directly under the account root folder. This may be desirable if file paths exceed the maximum number of allowed characters.
Path to MSI	Enter or browse to the location of the local AgentSetup.msi. This is the Agent Setup file you downloaded after configuring the agent settings.
Configure EMO Path	(Optional) Enter or browse to the directory you created to hold the PST and NSF constituent files the Agent rebuilds the archive files. Must be a fully qualified path.

5. Click **OK**.

**NOTE:** If NSF files are encountered, you will receive a prompt for credentials. Click **Browse** to select the **Notes User ID file path** for the local Notes client. Enter the **Notes password** and then click **OK**.

You can view the status of the retrieval in the Status section of the tool.

6. When the retrieval completes, click **Close Window**.

To retrieve files for accounts in another CSV, re-open the tool and complete this process again.

## Retrieved files

Once the requested files have been retrieved, you can view the retrieved files in the location you defined. The files for each account are placed in separate sub-folders.

A TXT file is created for each account for which files are retrieved. The file contains information about retrieval. You can review this information to verify processing.

### Example

```
C:\retrievedFiles\  
  101001387\  
  101001489\  
  101008964\  
  Agent_101001387_1-15-2018_16-25.txt  
  Agent_101001489_1-15-2018_16-27.txt  
  Agent_101008964_1-15-2018_16-27.txt
```

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