

First Time Instruction

Step 1	Download and install the software from www.steelgate.com (you will need to login)
Step 2	When Prompted, enter the following: Server Name: <i>Login at www.steelgate.com if you forgot</i> Username: <i>The one you chose during the sign up</i> Password: <i>The one you chose during the sign up</i>
Step 3	Restart the software to acquire the license
Step 4 (<i>setting parameters</i>)	Click on the "S" on the top left and Default Settings: <ol style="list-style-type: none"> 1. Management Server: and enter your Username instead of Steelgate, this will let you manage it via the CMC (if you have it) 2. VMware Servers: This is where you add your VM hosts, your VM will then show in backup tab as Plugins 3. Advanced Options: This is the temp folder for plugins - If you backup large SQL db and/or Exchange Store and/or VM machines (VM only applies for the cloud as it does not need spool to backup locally), you need to make sure your plugin temp folder has as much space as you are backing up. Select a new Temporary Files Directory location if need be, It MUST be a local drive, a USB is ok. 4. Run As: Select Run as specific user and select a user that has full rights over everything you are backing up, the administrator is recommended. 5. Notification: Enter the way you wish to be notified after your backups
Step 5 (<i>setting your Local backup</i>)	Click on the backup tab: <ol style="list-style-type: none"> 1. Enter a backup name describing your backup like "Daily Full" or "Daily Incremental", etc.. 2. Make your selection, DO NOT select your entire C drive, this is not where you do a Disaster Recovery. DO NOT select SQL files or Exchange Files, you MUST use the plugin for that. If you select files from other machines, select them via the network (not mapped drive) and make sure you have rights over them. 3. Click on the "Backup to" button to select your destination via the network (not a mapped drive) as if you do not see it, you cannot backup to it. Enter a name describing your backup like "Monday" or "Daily Differential" 4. Click on settings (bottom right) to select the "Write Mode" and "Backup Mode" from the backup tab. 5. Click Save (we recommend you save in the default location) and then click on the schedule button (bottom right) to schedule your backup 6. To make a new backup, click on the "S" and "New Backup Job"
Step 6 (<i>setting your cloud backup</i>)	From the Backup Tab <ol style="list-style-type: none"> 1. click on the "S" and "New Backup Job" if you are on an existing job 2. Enter a backup name like "Cloud Backup" 3. Make your selection, DO NOT select your entire C drive, this is not where you do a Disaster Recovery. DO NOT select SQL files or Exchange Files; you MUST

	<p>use the plugin for that.</p> <p>If you select files from other machines, select them via the network (not mapped drive) and make sure you have rights over them.</p> <ol style="list-style-type: none"> 4. The “Backup to” button defaults to the cloud so no need to change that. 5. We recommend that you do not touch the settings, they are set to full which is the most efficient way to backup and will create a reliable versioning (time you set at www.steelgate.com when you signed up) 6. Click Save (we recommend you save in the default location) and then click on the schedule button (bottom right) to schedule your backup. Once the initial backup is complete, future backups will be very fast 7. To make a new backup, click on the “S” and “New Backup Job”
Cloud Temp Folder	<p>Before your data goes off to the cloud, it will copy the file to a temp folder to encrypt and compress the file prior to send it to the cloud, it will also keep the files that change a lot there for a faster backup. If your C drive (Default location) does not have much space, please go to the device tab and double click on the XSP device (Internet globe) / advanced and click on the “Move Folder” button to select a new location. It can be any local drive, even a USB.</p>
Disaster Recovery	<p>Please follow the instructions from our web location.</p> <ol style="list-style-type: none"> 1. Disaster Recovery PDF 2. Other documents
Email Settings	<p>We will send important information about your account to the email address you have provided; please "white list" support@steelgate.com to ensure that you do not miss any important notifications.</p>