STORAGECRAFT.

StorageCraft MSP Portal User Guide

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StorageCraft MSP Portal User Guide

Welcome to the StorageCraft MSP Portal User Guide. Use the navigation links in the outline menu to find the information you need.

⚠ **Note: The StorageCraft Cloud is currently only available in North America and Asia Pacific. MSPs in other regions can ignore the StorageCraft Cloud Management section of this user guide.**

1 MSP Portal Overview

StorageCraft Managed Service Providers (MSPs) use the StorageCraft MSP Portal (http://msp.storagecraft.com/) to:

- Manage ShadowProtect MSP licenses.
- Create and manage StorageCraft Cloud Services user accounts.

MSP portal credentials are given to you when you register as a StorageCraft MSP.

Use the MSP Portal to:

- Download updated versions of ImageManager.
- Create and manage StorageCraft Cloud user accounts.
- Manage legacy ShadowProtect (SP) licenses, new SP-MSP licenses, and StorageCraft ImageManager jobs in the same place.
- View 12-month trends for ShadowProtect and IME licensing.
- Generate new activation serial numbers for SP-MSP installations.
- Organize licenses into Accounts and geographical sites to easily track how and where each MSP client uses ShadowProtect and ImageManager job licenses.
- View the status of any license (activated vs. deactivated), and if an SP-MSP license is in danger of being deactivated because it has not "called home" recently.
- Generate Activation and Billing Detail reports that contain detailed license activity for a specified time period.
- (For new ShadowProtect MSP licenses only) Initiate license deactivation with a single click. See step 3 of Managing Product Keys for additional information.

2 StorageCraft Cloud Management

Welcome to StorageCraft Cloud Management.

⚠ **Note: The StorageCraft Cloud is currently only available in North America and Asia Pacific. MSPs in other regions can ignore the StorageCraft Cloud Management section of this user guide.**

This page contains links to the StorageCraft Cloud Services User Guide.

- StorageCraft Cloud Overview
- Getting Started in the StorageCraft Cloud
- Creating a Cloud Services Account

3 ShadowProtect for MSPs

Welcome to StorageCraft® *ShadowProtect® for Managed Service Providers*. This document introduces ShadowProtect for Managed Service Providers (SP-MSP). It does not provide a complete description of ShadowProtect. For detailed information about using ShadowProtect, see the ShadowProtect User Guide.

This Guide includes the following major sections:

- Introduction
- The MSP Portal
- Installing ShadowProtect for Managed Services

Additional Information

For emerging issues and other resources, see the following:

- The `readme.txt` file included with the ShadowProtect product files.
- The StorageCraft technical support Web site at http://www.storagecraft.com/support.html.

Documentation Conventions

⚠️ **Note** or **Warning** text provides important information about the configuration and/or use of ShadowProtect MSP.

3.1 ShadowProtect for MSP Introduction

Welcome to ShadowProtect for Managed Service Providers (SP-MSP). This introduction provides only the basic information needed to get started with SP-MSP. A complete description for using ShadowProtect is found in the ShadowProtect User Guide.

SP-MSP is intended for Managed Service Providers (MSP) who want to provide disaster recovery services to their clients. The MSP unique licensing and installation model addresses the needs of MSPs.

MSPs need to understand the following SP-MSP features:

- SP-MSP provides a subscription-based licensing model appropriate for MSPs.
- SP-MSP does not include a free software trial period. An MSP must activate the ShadowProtect installation before it will function.
- MSPs can purchase and manage SP-MSP licenses online in the integrated StorageCraft MSP portal (http://msp.storagecraft.com). This includes the ability to remotely deactivate SP-MSP licenses as needed.
- The SP-MSP installer lets you install any ShadowProtect edition (Desktop, Server, or SBS) for your clients.
- SP-MSP supports push install (see Installing the Backup Agent Remotely), but license activation must be handled separately.
- SP-MSP requires Internet connectivity because the SP-MSP licenses "call home" daily to StorageCraft servers to confirm that the licenses are still active.
- SP-MSP license activation is valid for 30 days. The licenses automatically renew every 30 days unless one of the following occurs:
  - The MSP or StorageCraft explicitly deactivates the license.
  - The license stops calling home (which causes the license to automatically deactivate).

3.2 Generating Product Keys

Before installing ShadowProtect for Managed Service Providers (SP-MSP), generate the appropriate product key to activate the installation.
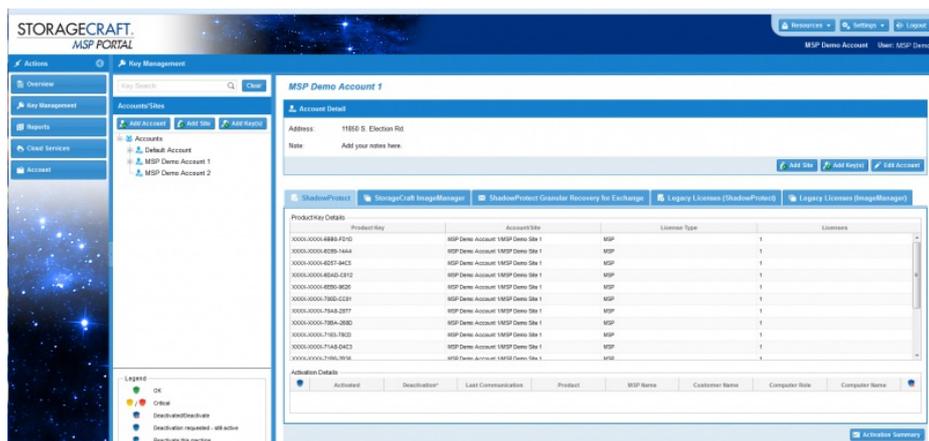
To generate a new product key

1. In the MSP Portal (in the Actions section on the left), select **Key Management**.
2. In the Accounts/Sites panel, select (or create) the Account/Site where you want to add a product key.
3. In the Account Detail panel, select the product tab (e.g. ShadowProtect) you want.
4. Click **Add Key(s)** in the Account Detail panel. This displays the Add Key(s) dialog box.
5. In the Add Key(s) dialog window, select the Product Type, Quantity (Qty.), and Account/Sited, then click **Add Key(s)** at the bottom of the Add Key(s) dialog box.

Product Type	The type of product key to generate. Options include the following:
	ShadowProtect for Managed Service Providers: Generate a ShadowProtect product key. This product key can activate any ShadowProtect edition (Server, SBS, or Desktop). StorageCraft determines billing fees based on the installed version of Windows where the product key is used.
	StorageCraft ImageManager: Generate a product key that contains ImageManager job licenses. Each product key can contain up to 50 jobs for each of the following:
	○ intelligentFTP ○ ShadowStream ○ HeadStart Restore
	ShadowProtect Granular Recovery for Exchange (GRE): Generate a product key that contains a GRE license for a specified Microsoft Exchange server. (**Quantity doesn't apply to GRE**.) Supply the following information:
	○ Exchange Server Name. ○ Exchange Server Version.
Quantity	The number of product keys (up to 10) to generate. (If applicable.)
Account/Site	The Account/Site container associated with these product keys. By default, the MSP Portal populates this field with the Account/Site selected in Step 2.

3.3 Managing Product Keys

After activating products you can use the integrated Key Management interface in the MSP Portal to manage product keys.
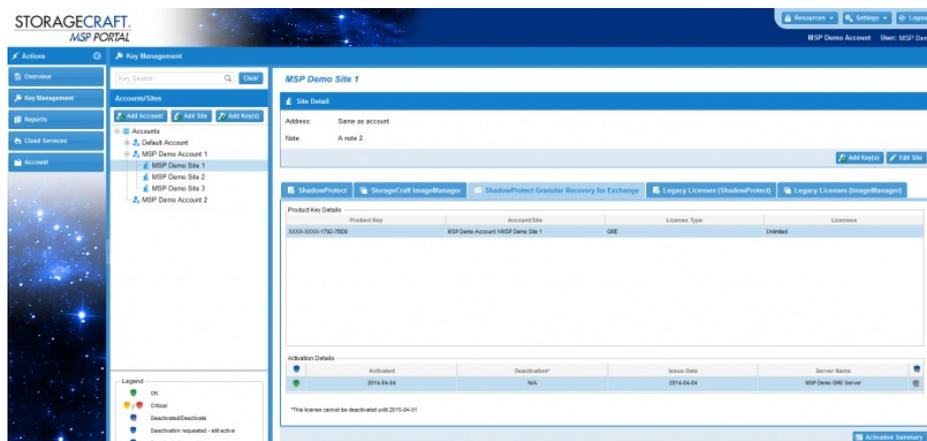
To Manage a Product Key

1. In the MSP Portal, click **Key Management**.
2. In the Accounts/Sites panel select an account.
3. Select the site you want to manage from the Accounts tree.
4. In the Site panel, select one of the product tabs (ShadowProtect, StorageCraft ImageManager, ShadowProtect Granular Recovery for Exchange, etc.).
   The Product Key Details panel displays a list of keys for the selected product.
5. Click on any of the keys in the list to display the Activation Details for that key.

Modify the product key status as needed. The MSP Portal makes the changes instantly. Depending on the product key type, you can do the following:

Change the Account/Site association: (Available for any license type) You can associate the product key with a different Account or Site by selecting it from the drop-down list. **Deactivate an SP-MSP key:**

Click **Deactivate** 🗑 to disable an SP-MSP product key and remove it from SP-MSP billing. SP-MSP finalizes the deactivation on the next call home. Once deactivated, StorageCraft no longer bills for the product key.

Reactivate a Deactivated SP-MSP key: Click **Reactivate** 🗑 on a previously deactivated SP-MSP product key to bring it back on-line. StorageCraft resumes billing for the product key once reactivated.

3.4 Organizing Product Keys

The new MSP portal organizes the keys for you. This page helps you understand how it works.

The **Key Management** panel displays the list of accounts and sites. Click the + on the left side of an account name to expand the list of sites for that account. Click on any of the sites to display the Site Detail and Product Key Details for the selected site. The Site Detail panel displays tabs for the various products (ShadowProtect, ImageManager, etc.). Click any of the tabs to see the keys for the selected product. Click any product key to see the Activation Details for the selected key. The legend helps you understand the activation details.
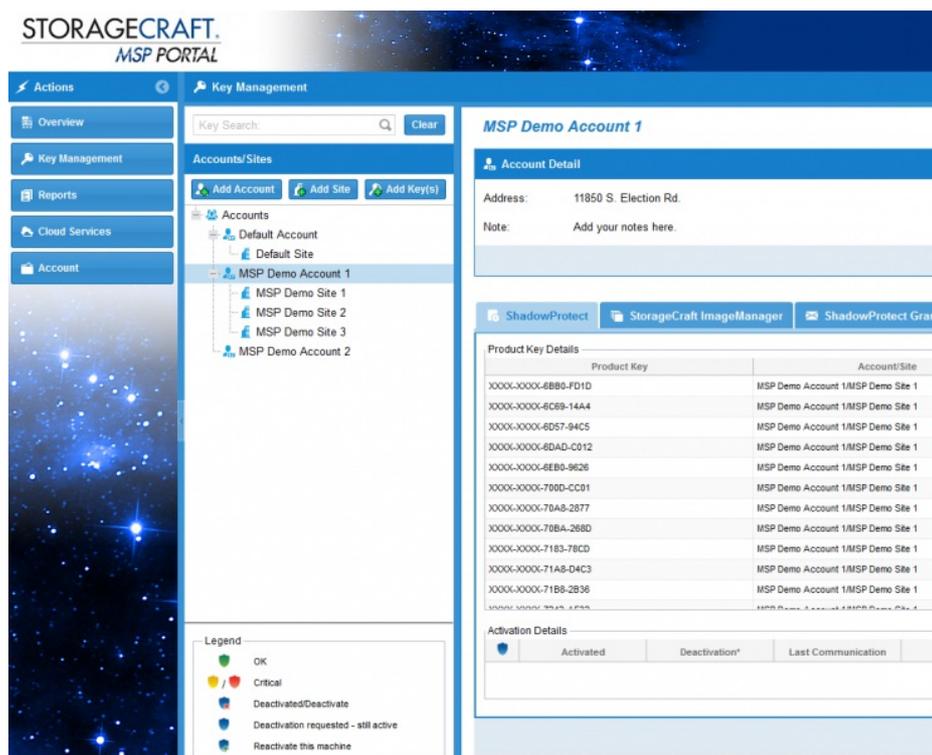
To add an account

1. In the MSP Portal, click the **Key Management** tab.
2. In the Accounts/Sites panel, click **Add Account**. This will display the New Account Detail panel.
3. In the New Account Detail panel, type the name of the account you want to add.
4. In the Address and Notes fields (optional) add information as you want it to appear in the MSP portal, then click **Save**.

Account Name	The name of the client account you want to add. Enter it as you want it to appear in the MSP Portal.
Address	(Optional) The client address.
Notes	(Optional) Any descriptive information that you want to associate with this client account. For example, primary contact information, account number.

To add a site

1. In the MSP Portal, select **Key Management**.
2. In the Accounts/Sites panel, Click **Add Site**.
3. In the New Site Detail panel, complete the empty fields and select the account associated with the new site.

Site Name	The name of the client site, as you want it to appear in the MSP Portal.
Account	Select the account associated with the site.
Address	(Optional) The site address.
Notes	(Optional) Any descriptive information that you want to associate with this client site. For example, contact information, groups located at this site.

⚠ **Note:** Once created, you can select an existing Site to modify its current values. You can change the account associated with the site by selecting a different account in the New Site Detail panel.

3.5 Installing ShadowProtect for MSPs

To install ShadowProtect for Managed Service Providers

1. Download the ShadowProtect for Managed Service Providers (SP-MSP) installer (For example, `MSP_Setup_5.1.5.exe`).
2. Deactivate any existing ShadowProtect licenses that you want to upgrade to SP-MSP.
   Doing this prevents double-billing of both the old and new licenses.
3. Launch the Setup installer.
4. On the Choose Setup Language page, select the language for the installation, then click **Next**.
5. On the Welcome page, click **Next**.
6. On the License Agreement page, select **I accept the terms of the license agreement**, then click **Next**.
   You must accept the license agreement to install ShadowProtect. Click **Print** to print out the License Agreement.
7. On the Setup Type page, select the type of installation you want to perform, then click **Next**.

Complete	Installs all ShadowProtect components at the default installation path (`C:\Program Files\StorageCraft\ShadowProtect`). The installation path varies slightly depending on the Windows version where you are installing ShadowProtect.
Custom	Displays two other Wizard pages that let you select the installation path and the specific ShadowProtect components to install.
Management Console	Installs the ShadowProtect Management GUI, which lets you manage ShadowProtect operations for this system and remote systems if desired.
Backup Agent	Installs the ShadowProtect Backup agent. This allows remote management of the ShadowProtect operations on this system.
Mount Tools	Installs the ShadowProtect mount driver and VirtualBoot.

8. In the Ready to Install the Program page, click **Install**.
9. In the Complete page, select **Yes, I want to restart my computer now**, then click **Finish.**
   If you cannot restart the computer immediately, select **No, I will restart my computer later.** However, you must restart the computer before attempting to use ShadowProtect.

Activating ShadowProtect for MSPs

⚠️ **Note:** SP-MSP does not provide a free trial period. Before using an SP-MSP installation, you must activate it.

To activate ShadowProtect for Managed Service Providers

1. Launch SP-MSP.
2. From the menu bar, select **Help** > **Product Activation**.
3. In the MSP Activation dialog box, provide the requested information, then click **Activate**.

Serial Number	The product key that you generated on the StorageCraft MSP Portal (see To Generate a Product Key).
MSP Name	The name of the MSP installing the product key. This value should be identical for every SP-MSP product key that you install.
Customer Name	The name of the client using this SP-MSP product key. This value should be identical for every SP-MSP product key installed for a particular client.
Computer Role	(Optional) A machine name or brief description that lets you easily identify the system associated with this SP-MSP product key. Although not specifically required, StorageCraft highly recommends specifying a computer role. Doing so makes it much easier to keep track of product key assignments and manage product key deactivation over time.

See the "ShadowProtect MSP Version" section on the ShadowProtect User Guide Agent Option page or Installing ShadowProtect for MSPs in the MSP Portal User Guide for additional information.

Clients using Proxy Servers

The MSP version of ShadowProtect on a 64-bit OS client uses a proxy server to access the Internet. It requires proxy settings for both 32-bit and 64-bit applications or ShadowProtect can't activate its license.

The proxy read-only fields in the MSP version of ShadowProtect (see Options > Agent Options > Agent NT Service Options) should match the proxy settings in Windows (see Control Panel > Internet Options > Connections > LAN Settings > Proxy Server).

See the "ShadowProtect MSP Version" section on the ShadowProtect User Guide Agent Option page for additional information.

4 StorageCraft MSP Portal Reports

The StorageCraft MSP Portal Reports page lets you monitor license (key) Activation and Billing Detail.
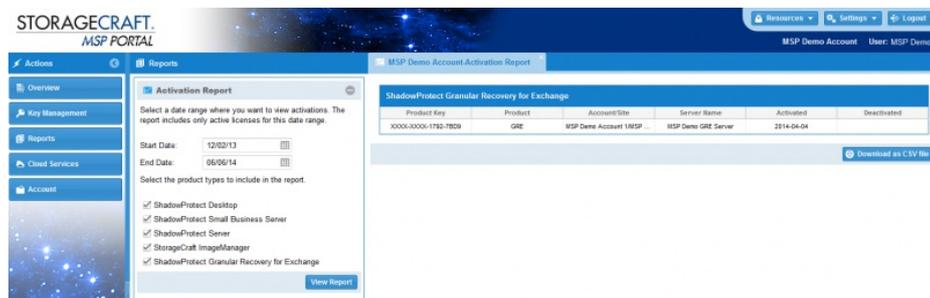
Activation Report

The Activation Report displays information about all product keys (activations and deactivations) assigned to a specific MSP:

- ShadowProtect-MSP keys (Desktop, SBS, Server).
- ImageManager-MSP keys.
- ShadowProtect Granular Recovery for Exchange.

To generate an activation report

1. In the MSP Portal, click the **Reports** tab. This displays the Reports panel.
2. In the Reports panel, click the **Activation Report** tab. This displays the Activation Report options.
3. Select the Start and End date and which product types to include in the report.
4. Click **View Report.**

Start Date	The start date of the date range to include in the report.
End Date	The end date of the date range to include in the report.
Products to include	Select the types of product keys to include in the report.
Sort	Specify how you want to sort the report output by clicking on the heading of the column you want to sort.

⚠ **Note**: To view the report in your browser, you must enable pop-ups for the MSP Portal URL (`msp.storagecraft.com`).

Billing Detail Report

The Billing Detail Report displays information about all product keys assigned to a specific MSP:

- ShadowProtect-MSP keys (Desktop, SBS, Server).
- ImageManager-MSP keys.
- Most importantly, the Billing Detail report displays a count of billable licenses for the specified month.

To generate a billing detail report

1. In the MSP Portal, click the **Reports** tab. This displays the Reports panel.
2. In the Reports panel, click **Billing Detail Report**. This displays the Billing Detail Report panel.
3. In the Billing Detail Report panel, select the month that you want to view in the report, then click **View Report**.

⚠ **Note**: To view the report in your browser, you must enable pop-ups for the MSP Portal URL (`msp.storagecraft.com`).

Saving a Report CSV File

You can display both types of reports (Activation and Billing Detail) on-screen or download them as a "Comma Separated Values" (CSV) file by clicking **Download as CSV file**.