

MyClientGlobal.com Documentation

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Contents

1. Getting Started

1. [Getting Started Guide](#)

2. MyClient Basic and above

1. [Monitoring Priorities](#)
2. [Security Features](#)
3. [Two-factor Authentication](#)
4. [Using the Event Log effectively](#)
5. [Using URL Rewrite for API connections](#)
6. [Search and column selection](#)
7. [Notes](#)
8. [MyClient Ticket System](#)
9. [Sync and Refresh](#)
10. [Bandwidth Schedules](#)
11. [Backupset Shelf](#)
12. [Operator Passwords](#)

3. MyClient Small Business and above

1. [Backup Reports](#)
2. [Email Deliverability](#)
3. [Moving accounts between AhsayOBS servers](#)
4. [MyClient Resellers vs AhsayOBS Subadmins](#)
5. [New Account Plans](#)
6. [Reseller Soft Quota](#)
7. [Mail Queue](#)
8. [Search Widgets](#)
9. [Server Health Monitor](#)
10. [Nesting Customers](#)

4. MyClient Enterprise and above

1. [Automatic Trial Conversion \(Ahsay v6 and below only\)](#)
2. [Configuration File Decoder](#)
3. [Configuring Caller ID Support](#)
4. [Configuring SMS Support](#)
5. [Customer Portal](#)
6. [Embedding MyClient into your own website](#)
7. [Event Handler examples](#)
8. [External Forms and API](#)
9. [Accounting features in MyClient Enterprise](#)
10. [Price Formula Syntax](#)
11. [AhsayRDR support](#)
12. [Secure Login Form](#)



13. [Tags, Custom Fields, and Billing Properties](#)
14. [Dashboards](#)
15. [Pricing setup guide](#)
5. Add-ons for MyClient Enterprise and above
 1. [Bannersync \(Automatic AdGroup Management\)](#)
 2. [Brandsets and Multiple URLs](#)
 3. [LDAP \(Active Directory\) Support](#)
 4. [StorageCraft ShadowProtect support in MyClient](#)
 5. [Dell Appassure support in MyClient](#)
 6. [Asigra support in MyClient](#)
6. Troubleshooting
 1. [Infrequently Asked Questions](#)
 2. [Troubleshooting alert emails](#)
 3. [Troubleshooting backup job statuses](#)
 4. [Timezones](#)
 5. [Troubleshooting the Restore Applet](#)
7. Appendix - MyClient reference material
 1. [Permissions Matrix](#)
 2. [Accessing private servers](#)
 3. [MyClient Historic Q&A Archive](#)
8. Appendix - AhsayOBS reference material
 1. [AhsayOBS SSL certificates with multiple SubAdmins](#)
 2. [Extracting AhsayOBS Wildcard SSL certificate](#)
 3. [Implementing AhsayRDR](#)
 4. [Importing AhsayOBS SSL certificate](#)
 5. [Workaround for AhsayOBS 6.x - 6.9.x.x vulnerability](#)
 6. [Workaround for AhsayOBS 6.x - 6.17.x.x vulnerability](#)
 7. [Branding AhsayOBM/AhsayACB software](#)
 8. [Timezone Reference](#)



§1. Getting Started

Getting Started Guide

Introduction

Thank you for choosing MyClient as your monitoring solution for Ahsay.

To begin, visit your MyClient installation and ensure you are able to log in with your provided credentials. When you first log in, you will be required to change your password. You will be provided an administrator username and password via email.

You will be provided with a subdomain of our non-descript domain `servermanagerpro.com`. MyClient is designed to be fully brandable, and we expect customers may wish to use their own domain names. If you are using one of our Small Business or Enterprise plans and would like to use your own domain, please contact support to assign a hostname to your license and discuss your options for SSL connectivity.

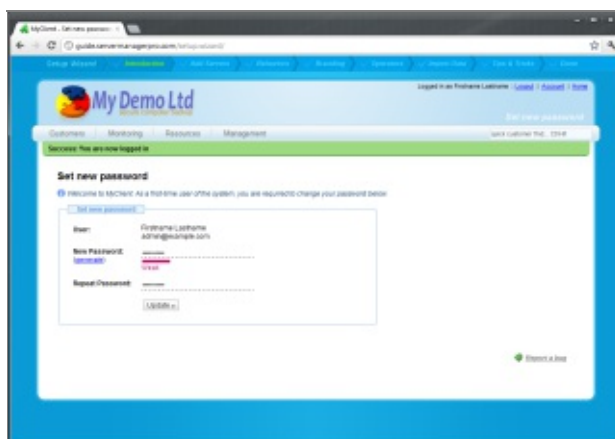


Figure 1. Changing the password

Enable OBS API Access

MyClient requires API access to your OBS servers. Recent versions of OBS have no default restrictions on API access. If you have customized your `web.xml` file, or have upgraded through several OBS versions, please ensure that MyClient will be able to get API access to your OBS servers.

In `obs/webapps/obs/WEB-INF/web.xml`, find the section `<filter-name>ApiAccess</filter-name>`. If a `range` parameter exists with the value `0.0.0.0-255.255.255.255`, MyClient will successfully connect to your OBS servers. If no such parameter exists, please add the following XML before `</filter>`;

```
<init-param>
  <param-name>Range3</param-name>
  <param-value>192.155.83.126-192.155.83.126</param-value>
</init-param>
```

IMPORTANT:

While every attempt is made to keep this guide up-to-date, the above IP address may not be accurate for your installation, depending on server demand, geolocation, and other features. To determine the correct IP address, please visit the "Manage Servers" page in your MyClient installation.

Some certain advanced features of MyClient also require access to the web console. You may also need to whitelist the `SystemConsole` section in the same way.

Replace `Range3` as appropriate for the number of existing IP filters. You will need to restart your OBS server for changes to take effect.

Connecting to OBS Servers

You will be presented with the setup wizard. Read the introduction and proceed to wizard step 2.

To add an OBS server, select "Manage Servers" from the "Management" menu, and click "Add a new server". Then enter your server details and administrator credentials, ensuring "Synchronize Backupjobs" and "Synchronize Users" are enabled. If you are using our Small Business or Enterprise plans, you should now repeat this process for all your OBS servers.



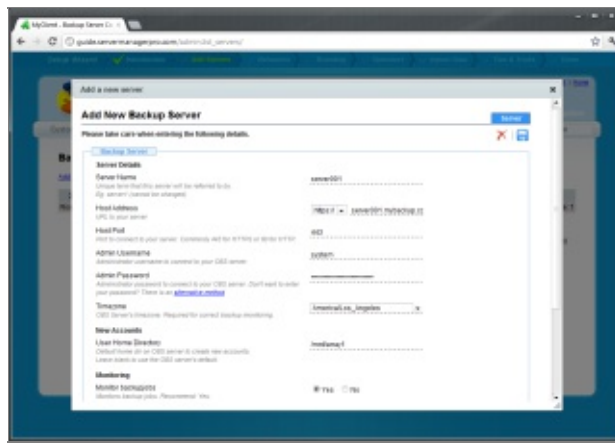


Figure 2. Adding an OBS server to MyClient

MyClient connects directly to your OBS servers, not via AhsayRDR. Once you have completed adding servers, return to the wizard by clicking the "Add Servers" tab at the top of the screen.

NOTE:

MyClient stores all credentials securely. If for any reason you are uncomfortable with MyClient storing your OBS administrator credentials, you may apply a workaround based on URL Rewriting.

Back in the Setup Wizard, click the "Synchronize Users" button to perform the initial synchronization of users and backupsets with your OBS servers. This opens a dialog informing you of the progress of the background task. The initial synchronization may take up to a minute to complete per 100 customers. You may leave this dialog running in the background while you continue with the wizard.

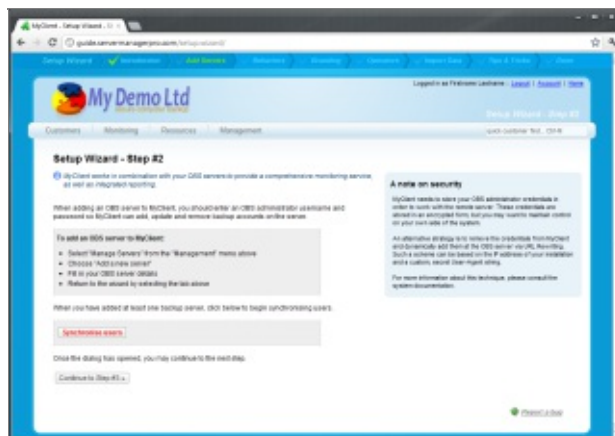


Figure 3. Before Initial Synchronization in MyClient

System Settings and Branding

To configure the system settings, select "System Settings" from the "Management" menu, and click "System Behaviour" (located under the "Behaviour" heading).

- Set the system timezone, system paper format, and any other settings you require.
- Return to the wizard by clicking the highlighted "Behaviors" tab at the top of the screen.
- Proceed to wizard step 4.

If you are using our Small Business or Enterprise plans, then you have the ability to completely customize the branding displayed in the portal interface. Otherwise your installation will display our default branding.

To configure the system branding, select "System Settings" again from the "Management" menu, and click "System-wide Branding" (located under the "Cosmetic" heading).

- Replace all the text with text of your own choice.
- Upload images to replace the system header, OBM, and ACB logos.
- Return to the wizard by clicking the highlighted "Branding" tab at the top of the screen.
- Proceed to wizard step 5.

Resellers and System Operators

If you are using one of our Basic, Small Business or Enterprise plans plans, MyClient is equipped with the ability to have multiple system users, each with a distinct set of permissions. For instance, you can separate your technicians from your system administrators and salespeople.





If you are using one of our Small Business or Enterprise plans plans, MyClient is equipped with full reseller support. Resellers in MyClient have access to all the advanced monitoring and reporting features of the system, while being restricted to their own customers. A limited amount of custom branding is available for each reseller office.

To create and manage system users for your staff and resellers, select "Manage System Users" from the "Management" menu.

TERMINOLOGY:

MyClient names the original service provider a "Primary Reseller"; this is your company, and has full permissions throughout the system. By default, your installation will be provisioned with one primary reseller. Primary Resellers are able to view all customers throughout the system regardless of owner, as well as make system-wide changes.

You may adjust the company details by clicking the Company Name entry, selecting the "Overview" tab, adjusting the details, and clicking the Save () icon. Close the dialog window.

You may reveal the system operators in a company by clicking the arrow () to the left of the company's name. Adjust the name and permissions of a system operator by clicking on their displayed name.

NOTE:

Depending on which plan you are using, MyClient will offer individual system users the ability to be separated into separate permission classes. For instance, users can be designated as administrators, technicians, sales personnel, or billing administrators. A reference chart for determining feature levels is available on the [Permissions Matrix »](#).

Continue to add system users and resellers. When you have completed managing system users, return to the wizard by clicking the highlighted "Operators" tab at the top of the screen.

SUPPORT SCENARIO:

There is an extra system operator named "MyClient Support" added by default to your installation. This account is disabled. If you wish to allow us access to your installation to verify a bug or correct any potential errors, you may do so by enabling this account.

Proceed to wizard step 6.

About Importing Customer Details

MyClient is designed to be an integrated monitoring solution, and the centre of your daily activities. It makes sense for MyClient to retain your customer data in order to provide effective monitoring, so you can see at a glance the customer behind the account name.

MyClient will store customer data for new accounts created within MyClient, but OBS has no such facility. If you are using our Basic, Small Business or Enterprise plans plans and you maintain separate customer data for billing or contact purposes, you may import it into MyClient at any point.

FUTURE FEATURE:

MyClient provides integrated customer management and a ticketing system. As well as this, development of an integrated sales and billing system is in its late stages.

If you do not wish to import customer data now, proceed to wizard step 7. You may decide to import customer data at any time.

OPTIONAL: Importing Customers

To import customer details to MyClient, select "View Customers" from the "Customers" menu.

- On the "View Customers" page, customers should have appeared in view via the synchronization process.
- Select "import" from the menu bar above.
- Select "import customer details" and press "Continue".

MyClient will let you download all existing customer records in .csv format. CSV files are editable with any common spreadsheet software, such as Microsoft® Excel® or similar. Make your changes to the file by copying data from your existing solution, and then re-upload the file. MyClient will interpret your uploaded data and display its results. Ensure that the displayed data is correct, and then click the button to proceed.

Return to the View Customers page to see that the data has imported successfully. You may view and make further changes to a customer's details from their page.

Return to the wizard by clicking the highlighted "Import Data" tab at the top of the screen, then proceed to wizard step 7.



Further Tasks

MyClient is now set up, branded, and synchronizing with your OBS servers. Backup monitoring will become more effective once MyClient has received a few days of backup history from your OBS servers.

Click the "Close Wizard" button to close the wizard and return to the MyClient homepage.

We encourage you to explore the system and look through the options in the "Management" menu above. In particular, we strongly encourage you to further customize the following areas of the system;

- Custom Account Plans
 - This feature is available to customers using one of our Small Business or Enterprise plans, and allows further integration into your business workflow.
 - Select "New account plans" under the "Behaviour" header on the "System Settings" page.
- System Static Text
 - This feature is available to customers using one of our Basic, Small Business or Enterprise plans.
 - A large amount of text areas in MyClient are completely customizable.
 - If you are using one of our Enterprise plans, you may also create new pages with the integrated editor, and add your custom pages as menu items within MyClient.
 - Select "Edit static pages, bulkmail templates and system messages", under the "Cosmetic" header on the "System Settings" page.

This item may be named slightly differently based on the capabilities of your specific installation.
- Mailmerge templates
 - Select "Upload Mailmerge templates", located under the "Cosmetic" header on the "System Settings" page.
 - For more information on managing mailmerge templates, please read the text on that page or contact support for further details.
- Backup Monitoring Priorities
- System Communication Settings



§2. MyClient Basic and above

Monitoring Priorities

Overview

Licensees with a large number of customers will appreciate the hassle of checking customers individually. A manual approach to customer management introduces unnecessary workload and does not scale with large numbers of accounts. MyClient's Monitoring Priorities system allows you to focus only on the customers that are experiencing issues, as defined by your own criteria.

About Monitoring Priority rules

You can configure your Monitoring Priority rules from the Manage Monitoring Priorities page. Rules can be simply defined as a number of days or backup errors since last success with a number of configurable options, such as the option to treat backup jobs with no changes as a failure case.

You can also use this page to set the default Monitoring Priority for new backupsets. As well as this, there are some further options on the Manage System Behaviour page allowing you to tweak the exact interpretation of Monitoring Priority rules.

Assigning monitoring priorities to your customers

INDIVIDUALLY

Monitoring priorities can be set for individual backupsets for each customer.

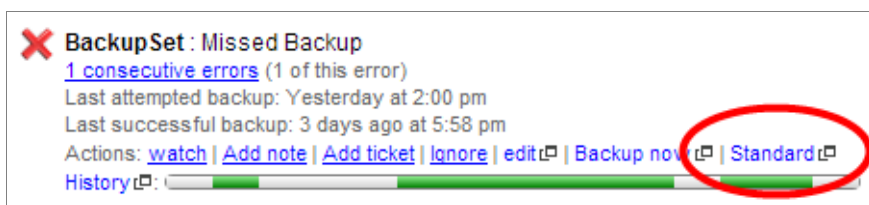


Figure 1. Setting a monitoring priority for a customer

Clicking this link opens the monitoring priority assignment dialog, allowing you to set the monitoring priority for all this customer's backupsets.

You can assign monitoring priorities to individual backupsets using this link from the customer detail, watchlist, and Event Log pages; or from the "manage monitoring priorities" link on the customer detail page.

IN BULK

You can use the Search Backupsets page to make bulk changes to monitoring priorities. For instance, assume you have a number of customers using a critical product;

- Use the Search Backupsets page to find all backupsets containing the name of the product;
- Click the 'Select all' link, and then the 'priorities' link to open the priority assignment dialog;
- Use the 'Set all' option to configure the monitoring priority, and then click 'Save changes'

Similarly, you could search for all backupsets containing the name "Laptop", and assign them to a lower monitoring priority so that you are not alerted to missed backups caused by the computer being offline.

Ignorable Errors

A wide variety of issues can cause a backup job to complete with "Success + Warning". Errors could be informational only (perhaps a harmless message from a pre- or post-command), or they could be a significant issue (perhaps source path not found). To help clarify this, MyClient allows you to preconfigure certain errors as 'ignorable'. If a backup completes with only ignorable errors, it is not flagged as failing its monitoring priority criteria.

You may configure the list of Ignorable Errors on the Manage System Behaviour page > Data Binding tab. MyClient includes the following ignorable errors by default;

- Backup completed with error
- Unable to log to server

Using Monitoring Priorities on the Event Log

By default, the Event Log uses Monitoring Priorities to filter customers down to only those requiring attention. This applies to both the web view and the Event Log email report. For more information, please see [Using the Event Log effectively »](#).

Security Features

Overview

MyClient makes a number of security features available for your peace of mind. This article presents a noncomprehensive overview of certain security features in MyClient.

Operator security

IP WHITELISTING AND INTRUSION ALERTS

Operators may configure a whitelist of allowed IP addresses from which MyClient will allow them access. Operators may opt to receive email alerts for every successful and unsuccessful login.

TWO-FACTOR AUTHENTICATION

MyClient supports two-factor authentication using the TOTP standard. This allows you to require a second verification when logging in with your password, securing you even in the case of a hijacked password. For more information, see [Two-factor Authentication »](#)

SINGLE-USE CODES, AND LOGIN VIA EMAIL/SMS

Experience has shown us that technicians often use MyClient in the field or at a customer's site to make changes on the fly. However, it would be inadvisable to enter your password on an untrusted computer in case of keyloggers or other malware.

MyClient allows you to pre-register single-use login codes from the Account page, or securely register a new login code at any time from the login screen via email or SMS verification.

If two-factor authentication (TOTP) is enabled as above, this is still required to be met at first login.

Administrators may configure the expiry time for single-use codes from the Manage System Behaviour page > System Users tab > "Expiry time for single-use logon codes" option. It is recommended to couple this with other security enhancements e.g. disabling the "Allow login from multiple locations simultaneously" option, to ensure that accounts are not mistakenly left logged in at remote sites.

HASHED PASSWORDS

MyClient employs industry best practices to maintain password security. Passwords are salted and hashed using 448-bit `bcrypt` with a strong work-factor parameter. We also make PBKDF2-SHA256 available for licensees who require specific regulatory compliance (e.g. NIST SP 800-132).

If an account was imported from an AhsayOBS SubAdmin, then it maintains the weak unsalted MD5 hash format only until first login, when the security is upgraded to `bcrypt` as above. This maximises security while still preserving imported passwords. MyClient supports importing passwords in a variety of formats, including ASP.NET MVC's hash format - please contact support if you wish to arrange importing legacy accounts.

PASSWORD POLICIES

Administrators may configure password rotation policies for all system operators. Both soft and hard password expiry dates can be configured, along with length and complexity requirements. Please contact us if you have further requirements.

Staff and reseller accounts with passwords contravening the password rotation policy will be required to change their password at next login.

CAPTCHA AFTER REPEATED INVALID PASSWORD ATTEMPTS

Administrators may configure MyClient to prompt for image verification after a configurable number of invalid password attempts from a single IP within a configurable duration.

IDLE TIMEOUT

Administrators may configure the timeout before which a system operator is logged out. This option is available from the Manage System Behaviour page > System Users tab > "Log out inactive system users after" option.

AUDIT TRAIL AND EVENT HANDLERS

All operator login events are logged for administrative review on the System Notifications page along with IP address. Administrators may search the notification history and set up automated handlers to flag unusual activity (e.g. logins outside business hours).

MyClient Enterprise licensees may also use the Event Handler system to manage account logins. For instance, you may configure event handlers to log out all system operators at 5 pm, or prevent logins during certain time periods.

AhsayOBS Server security

PASSWORD ENCRYPTION

For technical reasons, AhsayOBS server passwords are required to be stored with reversible encryption. AES256 is used with a random key. Key management is arranged so that a breach of either database or software alone would be insufficient to retrieve the password.



SERVER-SIDE SECURITY WITH URL REWRITING

You may employ URL rewriting on your AhsayOBS server to avoid supplying your AhsayOBS passwords to MyClient. You can specify a custom code to send in the User-Agent header on the Manage System Users page that, when coupled with MyClient's IP address, initiates pre-filling AhsayOBS credentials without ever exposing them to MyClient.

For more information, please see [Using URL Rewrite for API connections »](#).

AUDIT TRAIL AND EVENT HANDLERS

All direct logins to the AhsayOBS server are logged on the System Notifications page. MyClient Enterprise customers may use the Event Handler system to subscribe to emails or other alerts when a user logs in to the AhsayOBS server.

Customer account security

RETRIEVE PASSWORDS IN AN EMERGENCY

It is possible for MyClient to store customer account passwords. You can enter passwords yourself, or choose to store account passwords when new accounts are created from within MyClient. This allows you to retrieve customer passwords in the event of an emergency. All customer password retrievals require you to re-enter your MyClient password to provide non-passive authentication.

This again requires the use of reversible encryption. AES256 is used with a random key. Key management is arranged so that a breach of either database or software alone would be insufficient to retrieve the password.

BRUTEFORCE PROTECTION

After five failed login attempts to the Customer Portal or the Secure Login Form from a given IP address, the target IP address is blocked and a notification is sent to the configured administrative contact. The user must either wait for a timeout, or contact an administrator to clear the block.

Application security

A comprehensive permissions infrastructure ensures that no feature is available unless you allow it. All MyClient installations require HTTPS, allowing secure use from trusted devices on untrusted networks.

Further information

We are happy to discuss specific details of our security architecture with interested professionals. For more information, please [Contact Us »](#).



Two-factor Authentication

Overview

MyClient supports Two-factor Authentication to help secure staff and reseller logins to your MyClient installation.

Setting up Two-factor Authentication

To configure TOTP for your account:

1. Install a TOTP app on your smartphone

At the time of writing, we recommend the following smartphone apps:

- For Android, iOS and Blackberry: [Google Authenticator](#)
- For Android and iOS: [Duo Mobile](#)
- For Windows Phone: [Authenticator](#)

If you have hardware TOTP tokens, please contact us for assistance importing PSKs

2. Follow the links on the Account page to reach the two-factor authentication setup page
3. Click "Generate a new secret", and then scan the QR code into your TOTP app
4. Enter a current code from your TOTP app to enable two-factor authentication at login

That's all - now you'll require your TOTP app every time you log in to MyClient. The app will generate a new six-digit code every 60 seconds, which is confirmed with MyClient.

Troubleshooting

TOTP-based Two-factor Authentication requires your device or app to keep accurate time - within 30 seconds of the MyClient server's time. All MyClient servers run NTP, maintaining accurate time within a few milliseconds.

As MyClient requires a current TOTP code in order to enable two-factor authentication at login, there is no chance of being 'locked out' of your account until you have your device / app properly configured.

Locked out

However if your Two-factor Authentication device is missing, stolen, or unavailable, you may be unable to log in to your MyClient installation. In this case, you can regain access to your account by one of the following steps:

- Contact your support operator
- Have another MyClient administrator disable Two-factor Authentication for your account from the Manage System Users page.
 - This causes an immediate email to the impacted operator as well as a permanent record on the System Notifications log page.
 - Common alternative methods to recover from a two-factor authentication lockout scenario include recovery codes, second email addresses, or SMS confirmation, all which create additional attack surfaces.

Since another MyClient system administrator can already change nearly anything within the system, if one has access to an Administrator account already then this causes no decrease in security.

See Also

For more information on MyClient's security features, please see [Security Features »](#)



Using the Event Log effectively

What is the Event Log?

The Event Log contains only your customers that are currently experiencing issues with their backups. By advanced filtering and sorting by consecutive error counts, the Event Log helps you focus your support efforts only where they are required - and lets you resolve many issues without leaving the page. This power makes the Event Log the central workspace for your support technicians.

The Event Log is also available in a daily email format. For more information, please see the relevant section in the [Backup Reports »](#) article.

Managing customers from the Event Log

When troubleshooting a customer from the Event Log, a large number of tools are at your immediate disposal.

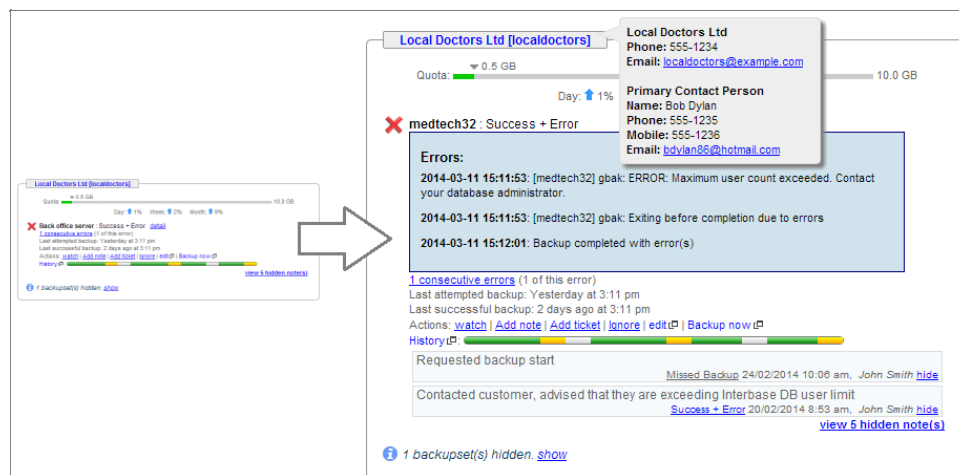


Figure 1. Expanding details on the Event Log

Without leaving the Event Log page, you can:

- See backup job status and error severity, along with time of last attempt and time of last success
- View full report or just expand backup job errors inline
- Use the History link to diagnose overlapping schedules
- See recent job history in the "thermometer" bar, click through to past reports
- Leave notes to refer to in future incidents
- Raise tickets to other staff members, your resellers, or directly to the customer
- Retrieve customer contact details for phone support
- Initiate a backup immediately
- Modify the backupset using the familiar and intuitive OBM-style Backupset Editor
- Ignore the error for a fixed time period, or add it to your Watchlist to manually keep an eye on

By providing customer notes, details and history alongside tools to manage the backupset, the event log allows you to very quickly identify and correct backup errors.

Filtering customers

By default, the Event Log is filtered by Monitoring Priority. This system allows you to tag customers and backupsets based on their level of support with you. For more information about setting Monitoring Priorities for your customers, please see [Monitoring Priorities »](#).

The event log offers a number of convenient filter options to help find customers which are experiencing issues. Filter by server, reseller, number of errors, or use the "advanced" link to switch to the full search capabilities (including all query parameters and braced conjunction support).

For MyClient licensees using nested resellers, some further customisation options are available from the Manage System Behaviour page > Interface tab.

Using URL Rewrite for API connections

Warning

This method is no longer recommended for use, as (A) it prevents the use of certain MyClient features and (B) the security benefits are negligible compared to password rotation.

The information is preserved below for reference.

Overview

We understand that in the interest of security, you may not wish to reveal your OBS passwords to the MyClient system. With this in mind, we have devised a system that lets you allow API access to your server without the need to reveal your passwords.

A normal API request looks something like:

```
https://.../api/getUser.do?sysUser=YOUR_AHSAY_USERNAME&sysPwd=YOUR_AHSAY_PASSWORD&LoginName=example...
```

Using the URL Rewrite system, the same request would be submitted like this:

```
https://.../api/getUser.do?LoginName=example
```

When an API request is submitted from MyClient to your OBS server, it includes a unique API key (in the form of a user-agent). The URL Rewriter intercepts all requests to your server before they get to OBS. If an API request is made, it will check for two components. Firstly, it checks if the request came from the IP address of MyClient. It also checks if the MyClient API key (user-agent) is correct. If both criteria match, it will add your Username and Password to the request, and then allow it through to your OBS server.

This has the following benefits:

- You never need to reveal your AhsayOBS Login Name and Password to MyClient - you keep this secret
- Your API requests are more secure because they do not contain your OBS login details

In order to use this system, you must have root access to your OBS server and the ability to add and edit the file-system. Changes recommended in this document are not for the faint-hearted and it is expected that you have a good working knowledge of your server and the OBS system. Do not attempt to make changes unless you are confident of what you are doing. Once changes are made, you will need to restart OBS. We cannot take responsibility for any problems that these changes may cause you.

Configuring URL Rewriting in MyClient

STEP 1. DOWNLOAD URL REWRITER

Visit urlrewritefilter.googlecode.com and download the latest version of UrlRewriter. This is an open source application and is free to use, but you should read and abide by their license terms. As a side-note, there are several other uses for urlrewriter that you can configure to improve the security and features of your OBS system. Please consult their documentation and think outside the square. We may publish an article on this at a later date.

STEP 2. INSTALL URL REWRITER

Installation is fairly simple and steps are provided below. However, you should also consult the documentation provided with URL Rewriter.

1. Copy the file `urlrewrite.jar` into the `AhsayOBS/webapps/obs/WEB-INF/lib/` folder.
2. Create a text file called `urlrewrite.xml` and copy the following code into it. Ensure that you replace the highlighted sections with your OBS username, OBS password and MyClient API Key. Note, the code below relates to version 2.6. If you use a different version, please adjust the code accordingly.

```
<?xml version="1.0" encoding="utf-8"?>
<!DOCTYPE urlrewrite PUBLIC "-//tuckey.org//DTD UrlRewrite 2.6//EN"
    "http://tuckey.org/res/dtds/urlrewrite2.6.dtd">

<urlrewrite>

<!--
EXPLANATION OF FOLLOWING RULE:
This rule allows the API to connect to a server without knowing the server's
System login details. Better security, but must be protected by a hash - sent
through as user-agent and also restrict the IP address to the IP of the connecting
server. Otherwise, it is possible to open the API to the whole world. Use with caution.
-->

<rule>
```



```

<from>/api/([^\?]*)\??(.*)</from>

<condition type="remote-addr" operator="equal" next="and">^MYCLIENT_IP_ADDRESS$</condition>
<condition name="user-agent" operator="equal" next="and">^MYCLIENT_USER_AGENT$</condition>

<to last="true">/api/$1?$2&amp;SysUser=YOUR_OBS_USERNAME&amp;SysPwd=YOUR_OBS_PASSWORD</to>
</rule>

</urlrewrite>

```

The MYCLIENT_USER_AGENT field is sent by MyClient with all API requests. This prevents any other services or MyClient installations on the same server from accessing your AhsayOBS servers. You may view and edit the User-Agent from within MyClient from the System Settings page >System Behaviour >Data Binding tab >"User-Agent for API requests" option.

The MYCLIENT_IP_ADDRESS field is the IP address of your MyClient installation. You may determine this by viewing the Manage Servers page from within your MyClient installation.

Note that for URLRewrite, the <condition> tag is matched as a regular expression, so please escape all period characters as \. - and if any of your AhsayOBS customers use special characters in their usernames, we recommend using URLRewrite 3.2 or newer with the <urlrewrite decode-using="utf8"> opening tag.

STEP 3. EDIT YOUR WEB.XML FILE FOR URLREWRITE:

Your web.xml file is the main configuration file for Tomcat, so again, you must be very careful with this.

1. Create a backup of your web.xml file (located in AhsayOBS/webapps/obs/WEB-INF/web.xml)
2. Open your web.xml file for editing (requires su on Linux / Administrator on Windows)
3. The following code should be pasted into the file directly below the OBS customizations. The exact location does not matter, as long as you don't enclose it within any other tags. Keep the file open, as you may need to make additional changes in the next section.

```

<!-- MyClient URLRewrite Section Begins -->

<filter>
  <filter-name>UrlRewriteFilter</filter-name>
  <filter-class>org.tuckey.web.filters.urlrewrite.UrlRewriteFilter</filter-class>

  <init-param>
    <param-name>confReloadCheckInterval</param-name>
    <param-value>0</param-value>
  </init-param>
</filter>

<filter-mapping>
  <filter-name>UrlRewriteFilter</filter-name>
  <url-pattern>/*</url-pattern>
</filter-mapping>

<!-- MyClient URLRewrite Section Ends -->

```

STEP 4. EDIT YOUR WEB.XML FOR MYCLIENT API ACCESS:

The following is also contained within the Ahsay documentation and is standard configuration. You may have already completed this step by following the Getting Started guide. It allows you to restrict access to your OBS Server's API to certain IP addresses.

1. Create a backup of your web.xml file (located in AhsayOBS/webapps/obs/WEB-INF/web.xml)
2. Open your web.xml file for editing (requires su on Linux / Administrator on Windows)
3. Add an entry to the ApiAccess section of the file. Look for <filter-name>ApiAccess</filter-name>.

```

<filter>
  <filter-name>ApiAccess</filter-name>

  <filter-class>com.ahsay.obs.www.IPFilter</filter-class>
  <init-param>
    <param-name>Range1</param-name>
    <param-value>localhost</param-value>

```



```
</init-param>
<init-param>
  <param-name>Range2</param-name>
  <param-value>127.0.0.1-127.0.0.1</param-value>
</init-param>

<init-param>
  <param-name>Range3</param-name>
  <param-value>MYCLIENT_IP_ADDRESS-MYCLIENT_IP_ADDRESS</param-value>
</init-param>

</filter>
```

Recent versions of AhsayOBS are preconfigured with a Range parameter of 0.0.0.0-255.255.255.255, allowing API access from anywhere and making this step obsolete. However, we recommend restricting API access to only known services with the above steps.

STEP 5. RESTART OBS

Stop and restart your OBS service. You should already know how to do this, please consult your Ahsay manual if necessary.

Search and column selection

Overview

Most data pages in MyClient use the same standard search system. Our search system offers the following features:

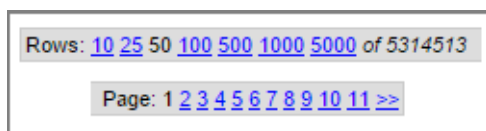
- Large range of search terms
- Advanced logic features, AND, OR, and brackets
- Custom column selection
- Save your search
- Load default system searches recommended by MyClient
- Manage your saved searches
- Export data to CSV

The search system is available on the View Customers, Search Backupsets, and Search Backupjobs pages, and in over 30 other places throughout MyClient. As you use MyClient more, it will become important to have a solid grasp of how to use the search system to quickly and efficiently find the data you're interested in.

Basic usage

PAGINATION

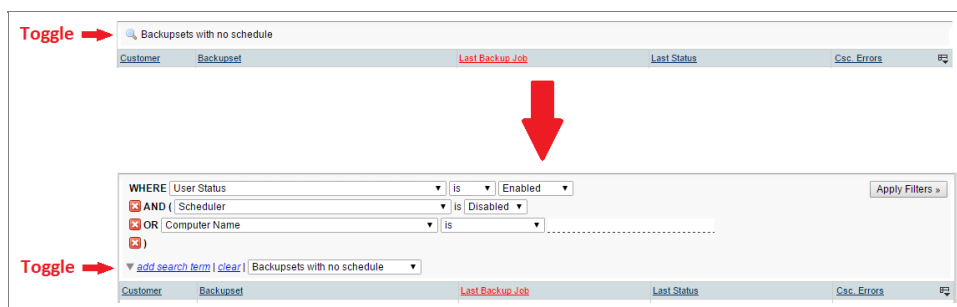
Often, there will be too many data records for a single page. You can change the page size, and flip between pages, by using the Page links at the bottom of the data grid:



If you're scratching your head to find out why a particular record isn't matching your search query, it might simply be on another page. The number of rows per page is a saved preference for each MyClient user; you can change it by using the Page links as mentioned, or by entering a custom value from the Account link in the top-right-hand corner of any MyClient page.

SEARCHING

At first, the search bar might be 'Folded' into a summary text. This is used to reduce complexity if the search options are unwanted. You can toggle between the 'folded' and 'unfolded' view by clicking on the Magnifying glass or the Fold arrow, respectively:



The first thing you'll see when unfolding the search bar is a line of text, made up largely of dropdown boxes and custom entry fields. The first box describes the type of thing you are searching for or searching about. You can select from many possible properties to search from.

You can add additional search terms by using the "add search term" link, and remove additional search terms by using the red X image that appears to the left of a search clause.

You can use more complex logic in your search terms by clicking on the "AND" word by a search clause. You can change the clause logic to use AND, OR, or any bracket combination. All brackets must open and close an evenly matched number of times before the search can be made.

When you are happy with the search described, click the "Apply Filters" button on the right in order to make your search.

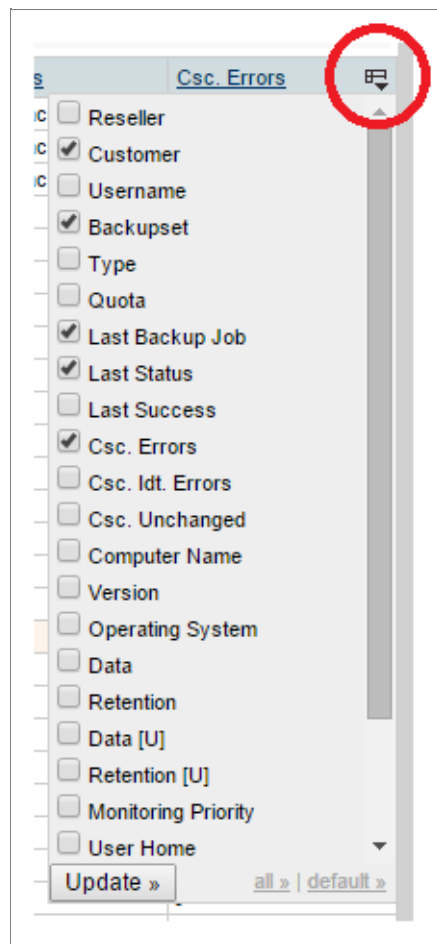
SEARCH TIPS

The most effective way to make a search is to think about what *property* differentiates an interesting record from an uninteresting one. Make the search, and then apply incremental refinements until you have a highly tuned query that finds only exactly what you require (with this in mind, when using the Search Backupjobs page to find Ahsay backupjobs, we strongly recommend using the "Days since job start" in order to limit the number of results to a reasonable time period).

COLUMN SELECTION

You can select columns for display by using the column-selection icon in the top-right corner of a data grid:





From the list of columns, you can use the checkboxes to hide or show different columns. You can also use the links at the bottom to select "all" or the "default" set of columns. If there are a large number of column options available, the list of checkboxes might scroll. Once you've selected the columns to display, click the "Update" button to refresh the data grid with the updated column selection.

SORTING

MyClient allows you to sort the data grid by column. With the limited exception of some dynamic columns, almost any column is sortable. To sort by a column, click the text in the column header. You can reverse the sort direction by clicking again.

COLUMN MANIPULATION

You can drag-and-drop the header of a column to rearrange the rows. When the drag-and-drop is released, the columns will be rearranged.

Saved searches

CREATING A NEW SAVED SEARCH

If you've created a useful view and wish to refer back to it later, you can save your search by clicking the "save" link and entering a descriptive name.

Saving a search preserves the following properties:

- All search clauses
- The sort order
- The selection of visible columns

If you are using MyClient Small Business or MyClient Enterprise, please note that saved searches are private to your reseller company only.

UPDATING A SAVED SEARCH WITH NEW CLAUSES AND COLUMNS

If you have a saved search that needs updating, you can load the search, make changes to the query, and then save it again with the same name. If the exact same name is used for the newly saved search, it will overwrite the old saved search.

DELETING SAVED SEARCH

To delete a saved search, load the saved search, and then click the red X icon next to the name of the saved search.

More features

MAKING A QUICK REFERENCE



MyClient Enterprise customers can create custom menu items that point to a search display. To do so, copy the URL of a saved search into the System Settings > Menu Items page.

EXPORT

If export is available for the current view, you can export all pages of the current data, by using the "save view" link above the data grid. The downloaded file is in CSV format and can be opened with Microsoft Excel or other tools.

MAKING A REGULAR EMAIL REPORT

MyClient Enterprise customers can use the Event Handler system to create custom rules to email search results on a regular basis. For more information, please see other documentation.



Notes

Overview

Often in the course of troubleshooting an issue, you'll learn some valuable information about a customer's configuration or about an issue. It's simply a good idea to leave a note for future reference.

MyClient allows you to leave a note against a customer record, against an individual Ahsay backupset, or against an AhsayOBS server. MyClient also loads your pre-existing notes from AhsayOBS. For customers with support for StorageCraft ShadowProtect or other products, there may be other places in which notes can be added.

Adding a note

You can add a new note by clicking the 'Add note' link, either

- on the lower right-hand side of a Customer Detail page, or
- on the Action bar underneath a backupset display, on either the Customer Detail, Event Log, Watchlist, or other pages

Clicking the 'Add note' link opens a text area in which you can enter your note. The text area expands as needed.

To save your note, simply click outside the text area. The note will be immediately saved, along with the current time and the name of your MyClient operator account, for future reference.

Note operations

EDITING A NOTE

You can edit a note by double-clicking on it. Once again, you can save your modifications by clicking outside the note. If you have made any modifications to the note content, then your MyClient operator account will become the note's author and the note's date will be updated.

HIDING A NOTE

If a note gets too old, or is no longer relevant, you may wish to hide it by clicking the 'hide' link. When the page is loaded again, you'll see a link saying "X hidden note(s)" which can be used to display the hidden notes.

DELETING A NOTE

You can delete a hidden note entirely, by clicking the "delete" link.

IMPORTING

MyClient Enterprise customers can import notes in bulk via the View Accounts page.

CREATING NOTES AUTOMATICALLY

When using the 'run backup' option to remotely initiate a new backupjob, you can choose to log a note at the same time to record the event.

MyClient Enterprise customers can create notes automatically in response to any system event, via the Event Handlers page. MyClient Enterprise customers can also enable an option to make notes of every change to a customer's billing configuration.

Permissions

If you have a MyClient Small Business or Enterprise customer, then notes may be shared with other staff members or (optionally) other resellers. Please consider the sensitivity of the notes you leave.

If a reseller has the necessary access to view a specific customer or a specific backupset, they may or may not have access to view and manipulate notes on or about that customer. You can choose whether a reseller has permission to access and manipulate (A) customer notes or (B) backupset notes, as part of their Reseller Permission Group. You can change this setting for a reseller from the System Settings page > Permission Groups > {select group}> MyClient interface tab > "Allow resellers to view, add, and edit customer/backupset notes" option.



MyClient Ticket System

Overview

MyClient has a built-in ticket system. The ticket system is flexible and can be used for any purpose, including

- Internal task tracking between staff members
- Communication and support for your resellers
- Communication and support from a mid-level reseller to a subordinate reseller
- End-user customer support

Using a built-in ticket system has the advantage that it is simple to create tickets about technical issues at any time, and have the ticket linked back not only to the customer, but directly to the original issue, down to an individual backupjob.

The ticket system supports

- Lodging tickets from a number of places throughout MyClient, without ever leaving the current activity
- Attach tickets to a customer, backupset, backupjob, or other item
- Assign tickets to individual staff members or entire reseller companies, for email notification
- CC note to any email address
- Set deadlines
- Graphical ticket status report on homepage
- Sending branded, customised email notifications
- Daily email summary of open tickets
- Advanced search and filter of tickets
- Receive new tickets by email, preserving attachments and automatically filtering quoted text
- Receive new tickets via the Customer Portal
- Hide spam and off-topic ticket notes
- Display Gravatar images in ticket conversations
- Automatic ticket creation, processing, filtering, and closing based on arbitrary criteria (MyClient Enterprise)
- Automatically add notes to tickets based on arbitrary criteria (MyClient Enterprise)
- and more!

We appreciate that many customers already have a ticket system in place for their business. If you're committed to an existing system, we respect this decision and have an option to disable MyClient's built-in ticket system, to avoid any double-handling. You will miss out on contextual information, integration, and our automation features.



Sync and Refresh

Overview

MyClient synchronises information from your AhsayOBS servers, and works mostly with a local cache of your information. This allows us to significantly increase performance, as well as allowing you to use complex search structures and analysis functions.

However, it comes with a small downside. Any action initiated within MyClient is noticed immediately, but MyClient has to periodically check in to find changes that happen on the AhsayOBS server. In order to minimise the impact on your AhsayOBS server from these periodic checks, MyClient synchronises different information at different rates depending on how likely the information is to have changed. Things that change more often, like new and updated backup jobs, should be up-to-date within five to ten minutes. Things that change less often may take longer to appear within MyClient.

MyClient's sync rate has been tuned over years to give a very good balance between interactivity and minimising impact on your AhsayOBS servers. Our refresh rate should be suitable in almost all cases.

Force refresh / Instant Feedback

ONE CUSTOMER

If you are troubleshooting a customer, and you need instant feedback, you can use the Refresh image button in the top-right-hand corner of a Customer Detail page.

MULTIPLE CUSTOMERS

You can perform a full sync of all customers on an AhsayOBS server via the Management menu > Manage Servers > {click server row to highlight} > "resync" button on the top bar.



Bandwidth Schedules

Overview

MyClient offers the ability to schedule changes to a customer's bandwidth. This allows you to reduce the customer's upload speed during business hours, so that long-running backup tasks do not impede the customer's ordinary business activities.

Permissions

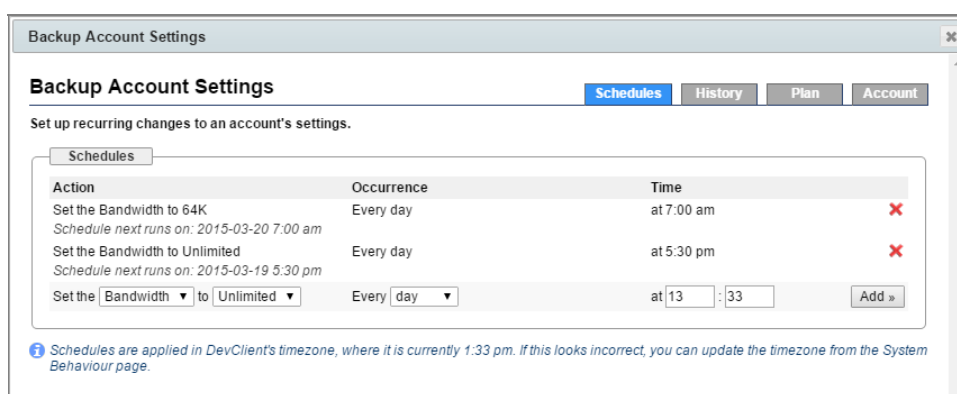
For MyClient Basic, the Bandwidth Schedules feature is available.

For MyClient Small Business and MyClient Enterprise, the Bandwidth Schedules feature is available to all staff and reseller operators who

- have either Technician or Billing permission
- are in a Permission Group with the "Bandwidth Schedule Changes" option enabled and at least one of the "Bandwidth Increase" or "Bandwidth Decrease" options enabled

Scheduling Bandwidth Changes

From a Customer Detail page, click the "manage backup account settings" link, then choose the Schedules tab from the top bar.



The screenshot shows a window titled "Backup Account Settings" with a tabbed interface. The "Schedules" tab is active. Below the tabs, there is a section titled "Set up recurring changes to an account's settings." followed by a "Schedules" sub-tab. A table lists scheduled actions:

Action	Occurrence	Time	
Set the Bandwidth to 64K <i>Schedule next runs on: 2015-03-20 7:00 am</i>	Every day	at 7:00 am	✗
Set the Bandwidth to Unlimited <i>Schedule next runs on: 2015-03-19 5:30 pm</i>	Every day	at 5:30 pm	✗
Set the <input type="text" value="Bandwidth"/> to <input type="text" value="Unlimited"/>	Every <input type="text" value="day"/>	at <input type="text" value="13"/> : <input type="text" value="33"/>	<input type="button" value="Add »"/>

Below the table, a note states: "Schedules are applied in DevClient's timezone, where it is currently 1:33 pm. If this looks incorrect, you can update the timezone from the System Behaviour page."

Figure 1. Backup Account Settings dialog

From this dialog, you can add and remove scheduled bandwidth changes.

If you are using MyClient Small Business or MyClient Enterprise and are in a Permission Group which has only one of the "Bandwidth Increase" or "Bandwidth Decrease" options available, you will only be able to increase or decrease respectively the bandwidth from its current value.

Bandwidth changes can be scheduled for

- every day, at a certain time of day; or
- one day every week, at a certain time of day; or
- one day every month, at a certain time of day

At the time of writing, MyClient applies these bandwidth changes in its local timezone (as configured via the System Settings page > System Behaviour > Internationalization > "Timezone" option). If your customers in MyClient are spread between many timezones or if for some reason MyClient's interface timezone is not configured to match the customer's timezone, then this option may schedule bandwidth changes at an unexpected time. A future update to MyClient will anchor these changes to the customer's timezone instead of MyClient's timezone.

Backupset Shelf

Overview

The Backupset Shelf is a counterpart to MyClient's Backupset Editor. The Backupset Editor in MyClient allows you to create and modify Backupsets for all your Ahsay customers. The Backupset Shelf allows you to copy a Backupset's profile settings from one customer to another.

This feature is recommended for use in the following scenarios:

- A backupset requires a large number of complex pre- or post- commands, and must be configured with minor changes across multiple customers. You can create the backupset for one customer, and then use the Shelf to copy the backupset profile settings for another customer
- You wish to migrate a backupset profile from one customer to another

The Shelf feature migrates backupset settings only. It does not migrate customer data between Ahsay accounts.

Backupset Shelf

OPENING THE SHELF

You can open the Shelf from a Customer Detail page, by clicking the clipboard icon in the lower-left-hand corner of the "BackupSet Event Log" section;

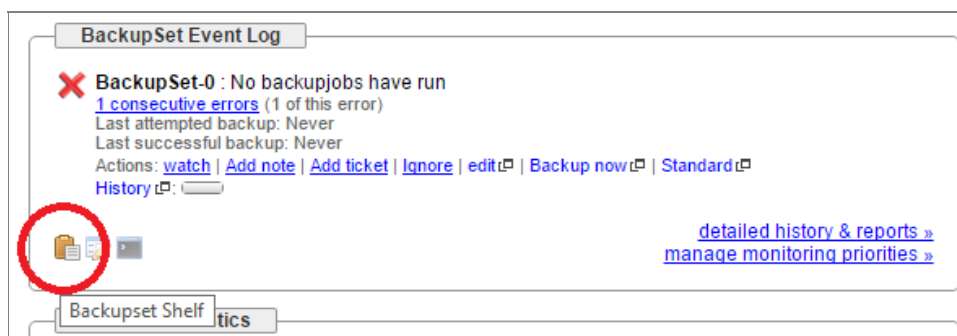


Figure 1. Location of the Shelf icon

USING THE SHELF

The Shelf has two columns. On the left, the current customer's backupsets are displayed. On the right, the Shelf backupsets are displayed.

On the left-hand side, you can use the ">>" button to copy a backupset profile into the Shelf.

On the right-hand side, you can use the "<<" button to copy a backupset profile back from the Shelf onto the current customer.

You can also use the "..." and "X" buttons to rename or remove the Shelved backupset, respectively.

Operator Passwords

Overview

If you have forgotten your MyClient operator password, there are different methods to access your MyClient account.

If you are using MyClient Small Business or Enterprise and have created multiple login operators, there are several ways you can safely communicate their initial credentials to your staff member or reseller.

Option 1. Normal login

Log in with your supplied email address and password.

When a new operator is created, a temporary password is generated and displayed in plain text. This password can be used for login. The first time an operator logs in, it is mandatory for them to change their password.

Option 2. Single use code

When the single-use code feature is used, a password is emailed to the operator, which can be used for login. If the operator is a new operator, the above rule for first-time operator logins will take effect, causing a mandatory password update.

Option 3. Reset Password

The "request a new password" and "reset password" links on the Login page begins MyClient's standard reset-password workflow. In this process, a temporary code is emailed to the operator. If this code is entered on the "reset password" page, the operator's password is cleared, and they are prompted for a permanent replacement password.

For a new operator's first login, the single-use-code workflow appears equivalent to the reset-password workflow. However the behaviour is different if you are not a new operator (e.g. if you have really forgotten your password, the single-use-code system would let you log in, but does not allow you to change your password).

If you are using MyClient Small Business or Enterprise and have created multiple login operators, another administrator can reset your password back to a temporary password via the Manage System Users page. This temporary password must be changed on next login, as per "Option 1 Normal login" above.

Password policies

MyClient supports password policies, including length restrictions, character restrictions, time limits, change frequency limits, and CAPTCHA. An administrator can configure password policies via the Management menu > System Settings > System Behaviour > "System Users" pane > "System User Password Policies" section.

Notes on email security

For more information about the Mail Queue, please see the [Mail Queue](#) documentation.



§3. MyClient Small Business and above

Backup Reports

Overview

MyClient can send a range of backup reports to your staff, customers and resellers. MyClient's reports are simple, attractive, customisable and help draw your attention to any issues with backupsets you are monitoring.

There are three main classes of report:

- a daily backup report sent to customers
- a daily Watchlist or Event Log summary sent to staff and resellers
- custom reports created with the Automated Events framework

When experimenting with the settings described below, please be reassured that emails are only queued, and will not be sent unless processing the mail queue has been enabled from the System Maintenance page. Once you are happy with the branding for these reports, please clear out any existing unbranded emails from the mail queue by using the tools on the "Mail: Browse History" page before enabling mail queue processing.

For customers: Daily Backup Reports

MyClient can send a daily, consolidated email report to your customers. This is one email per day, with a summary of all backupsets on the account, in a modern format with easy links through to the full backup report (which can optionally require a password to view).



Figure 1. A customer report using the "Modern single-customer" template

CUSTOMISING THE DAILY BACKUP REPORT EMAIL

The emails can be customised and previewed before being enabled:

- The basic interface template can be chosen on the System Settings page > System Behaviour > Customer Notifications tab.
 - We recommend using the "Modern single-customer" template for customer backup reports - this is the default for new MyClient installations created after a certain date
- On the System Settings page > Text Templates page, you may customise the text templates used in these reports - including the header and footer messages.
 - You can also override many of the text templates at the reseller level, from the Manage System Users page. The systemwide options are used if no custom version is available for the reseller.
- You may set a custom header image for emails destined for reseller customers, by enabling the option on the Reseller dialog from the Manage System Users page.
- You can preview the report, as it would be sent to a customer, by using the "preview" link on the right-hand side of a Customer Detail page.

ENABLING THE DAILY BACKUP REPORT EMAILS

Daily Backup Reports can be enabled on a per-customer basis, on the People tab of a customer dialog. Reports can be sent daily, disabled, or sent only on failure. By default all customers have this option set to "System Default", which means the value is inherited from the option on the System Settings page > System Behaviour > Customer Notifications tab.

It is also possible to prevent sending any daily backup reports at the reseller-level. This option is available on the System Settings page > System Behaviour > Permission Groups.

Name	Email
Reseller Support	support@my-reseller.com
John Doe	johndoe@example-customer.com

Send backup reports: ☐ Daily ☐ Daily on failure ☐ Disabled ☒ System Default

Require login to view detailed report: ☐ Yes ☐ No ☒ System Default

Save Changes »

Figure 2. Editing the Backup Report Recipient settings

If you are using MyClient Enterprise, it is possible to trigger sending a daily backup report at any time, or in response to any internal or external event, for any customer or range of customers, using the Manage Event Handlers page.

MyClient synchronizes a customer's backup report recipients with AhsayOBS, so it is simple to switch from AhsayOBS reports to MyClient reports by disabling the relevant tasks on the Routine Job page on the AhsayOBS web console. However, although MyClient can enable or disable daily backup reports on per-customer basis, this is not possible with AhsayOBS other than remove the recipients; but since the recipients are synchronized, it is probably necessary to switch all customer reports at once.

There are many more options to explore, particularly on the Customer Notifications tab on the Manage System Behaviour page - including which time reports are sent, which style of quota bar to use, and many more.

For Staff and Resellers: Watchlist, Event Log, and All Customers email reports

Each MyClient system operator has the option to enable receiving the Watchlist and Event Log in an email format. An operator may configure these themselves from the Account link, at the top-right of any page; or a system administrator may enable or disable these reports for each user on the Manage System Users page.

In summary, the Watchlist provides a self-curated list of backupsets that you are currently troubleshooting; the Event Log provides a highly focused list of only backupsets that are currently displaying errors, based on your own monitoring criteria.

You may choose when Watchlist and Event Log emails are sent by using the options from the System Settings page > System Behaviour > System Users tab - as well as other options covering the specific behaviour of the Event Log email.

For other scenarios: Custom reports

If you are using MyClient Enterprise, then you may create and send custom reports using the Automated Events Framework. The basic premise is as follows:

1. On the Search Backupsets page, create a search that finds all the backupsets you wish to include in the report
2. Save this search with a descriptive name
3. On the Manage Event Handlers page, create the following event chain:
 - Every day at {chosen time} → Send custom backup report {from your saved search}

You may select a recipient and a graphical template to use for the report.

Available graphical templates

A number of graphical templates are available for use in any of the above reports. More templates are added over time, so we recommend looking through them using the Preview option in order to find one you like.

Single-customer reports display only one quota block in a friendly manner: these templates are intended for Daily Backup Reports and any custom reports that target a single backup account. They display detailed information about the most recent job.

Multi-customer reports display each customer's quota block inline with their information: these templates are more direct and less forgiving with the information they display, often including potentially harsh technical information such as the last time a backup completed successfully, and the number of failures since the last successful backup. These templates are intended for staff and resellers receiving the Watchlist and Event Log emails, and any custom reports that target multiple backup accounts.

Email Deliverability

Overview

MyClient can send email reports on your behalf. MyClient normally has very good email deliverability, however at times you may find that your customers' email services are blocking receipt of email reports, or otherwise having email reports marked as spam.

This page lists a few suggestions to maintain high levels of email deliverability.

General list hygiene

It is important that you send email only when it is solicited and only to registered customers or resellers of your service. Regularly check the return address mailbox for any bounces or support requests. Email bounces should be dealt with promptly to prevent any further issues.

If an email is bouncing, the bounce message may provide further information on how to resolve the problem; depending on the particular bounce message, you may need to either

- apply other suggestions in this document; or
- contact the customer to ask them to modify their spam filter settings; or
- contact the customer to ask for an updated email address.

Sample bounce messages include "mailbox is full", "host unknown", "message could not be delivered", or "mail appears to be unsolicited" error messages.

If a customer is using an email address at a custom domain (e.g. @my-company.com instead of @gmail.com or @outlook.com), then, you could check whether the custom domain has expired.

Custom SMTP server

MyClient supports using a custom SMTP server for all outgoing emails. If you run a mail server in your own organisation, this is an easy way to take control over your email deliverability. You can configure the outgoing SMTP server from the Manage System Behaviour page > Gateways pane > Outgoing email gateway.

Third-party commercial SMTP providers can be used to ensure reliable email deliverability.

SPF record

You can add your MyClient installation to your domain's SPF record. This indicates to recipients that MyClient is authorised to send email on behalf of your domain, helping increase deliverability. If you are adding an SPF record for the first time, make sure to also add appropriate SPF mechanisms for any other services that send mail on behalf of your domain, as well as appropriate SPF mechanisms for your primary email service.

We recommend using the `ip4:` and `ip6:` SPF mechanisms to allow MyClient SPF access your domain. If you are not using a custom SMTP server, then the outgoing IP addresses used by your MyClient installation can be found on the Manage Servers page.

Sending emails on behalf of other companies

MyClient allows setting custom From addresses for different reseller offices on the Manage System Users page. This can add unexpected complications to email deliverability. For instance,

- If you are using a custom SMTP server, it might be restricted to sending emails on behalf of the parent company only.
- The reseller's configured From address might be invalid (e.g. blocked by reseller's SPF record; or, misconfigured MX record; or, custom domain has expired). If the reseller's From address is invalid, the mail may go undelivered.
- Bounce messages are configured to be sent to the configured From address. If the reseller's From address is invalid, the bounce message may not be received by anyone.



Moving accounts between AhsayOBS servers

Overview

Ensure that the account is removed from one server before adding it to the new server.

Detail

MyClient does not receive sufficient access to your AhsayOBS servers in order to migrate accounts on your behalf. You must manually migrate the accounts according to AhsayOBS documentation, and then the changes will be reflected in MyClient automatically upon its next background sync. No account details or history will be lost in the process.

To speed up the process of detecting a migrated account, you may manually initiate a sync operation via the Manage Servers page > {click rows to highlight all backup servers} > "resync" button in the top bar.

MyClient detects account migrations by matching usernames. However, as MyClient also supports duplicate usernames across backup servers, it is important to strictly adhere to the above procedure when moving accounts. Otherwise **if the account is visible on both servers simultaneously, MyClient will treat it as two separate accounts** that happen to share duplicate usernames, and the account's history and information will become split across two records.

If you find an account incorrectly split across two records, you may use the Merge feature on the right-hand side of a Customer Detail page to merge the partial records together. At the time of writing, the Merge feature is disabled by default for all MyClient customers; please contact MyClientGlobal.com Ltd to enable this feature for your installation.

See also

- Ahsay documentation on migrating accounts between AhsayOBS servers: <https://forum.ahsay.com/viewtopic.php?f=162&t=10141>



MyClient Resellers vs AhsayOBS Subadmins

About MyClient

MyClient is a comprehensive portal for you, your staff and your resellers to manage and support your online backup customers. It provides a wide range of features related to managing AhsayOBS servers, making it an essential part of any AhsayOBS-based business.

MYCLIENT RESELLERS

MyClient's reseller system is separate to AhsayOBS's Subadmin system and predates it. MyClient's reseller system is more flexible than AhsayOBS Subadmins: a wide range of permissions, rules, customizations and branding can be applied in bulk or to individual MyClient resellers. MyClient also has a reseller hierarchy allowing for nested resellers.

The indirect attachment allows for more complex arrangements; for example, it's possible to

- create MyClient resellers who can see all their customers for multiple Subadmins on multiple servers; or
- create MyClient resellers that see only their customers within a shared AhsayOBS Subadmin; or
- use reseller support on AhsayOBS 5.x server versions that do not support Subadmins.

PRIMARY OFFICE

Your own access to MyClient is as a "Primary" reseller office. Staff in a "Primary" reseller could have full control over administrating the MyClient portal.

AhsayOBS Subadmins in a MyClient world

Because the two systems are different, it may be inconvenient if you started using MyClient after already making significant use of the AhsayOBS SubAdmin system. MyClient has a number of features to ease this migration.

SUBADMIN SYNC

A MyClient reseller can have a number of Subadmin Sync rules attached to it. The Subadmin Sync process runs in the background to automatically reassign AhsayOBS customers to MyClient Resellers, based on their AhsayOBS Subadmin.

This means that if a reseller creates a new customer outside of MyClient - e.g. by Trial Signup in the OBM/ACB client, or by direct access to the AhsayOBS web portal - then it will be reassigned to the correct MyClient reseller. Subadmin Sync rules also mean that new accounts created by the reseller inside MyClient are not only assigned to the correct MyClient reseller, but also assigned to the correct Subadmin.

New accounts detected on the backup server that do not match any Subadmin Sync rules are assigned to the MyClient reseller specified for the specific AhsayOBS server, in the Manage Servers page. For most installations, this would be the primary office, but there are situations where it may make sense to change it.

The Subadmin Sync feature works both ways - if a reseller creates a new account within MyClient, it will be assigned to the correct AhsayOBS SubAdmin on the backup server.

MyClient currently makes no attempt to move already-existing accounts between AhsayOBS Subadmins, however, there's no harm in you doing so yourself.

You can troubleshoot issues with your Subadmin Sync rules via the Management menu > System Maintenance > "Verify Subadmin Sync Rules" page.

IMPORT RESELLERS

MyClient allows automatically creating new MyClient Resellers based on the subadmins on your AhsayOBS servers.

You can use the "Import Resellers" link to import Subadmins into MyClient resellers - this preserves all Subadmin data, including email addresses and passwords, so your resellers can log in to MyClient without changing their password. Using the "Import Resellers" link also creates Subadmin Sync rules for the created MyClient reseller.

You may run this task either on demand, or automatically in the background by enabling the "Automatically import MyClient operators from the backup server" option on the Manage System Behaviour page.

SUMMARY

Once your resellers are comfortable with using the advanced MyClient interface instead of the AhsayOBS web portal, the sole remaining purpose of AhsayOBS Subadmins is therefore to allow OBM/ACB client connections on an alternative hostname.

Reassigning customers between MyClient resellers

You can change the reseller for a single customer from their information dialog:

1. Open a customer's detail dialog
 - From a customer's detail page, click the "edit" link on the right-hand side; or,
 - From the View Customers page, select a row and then click "edit" on the top bar
2. The Reseller option can be set on the "Overview" tab for most installations, or on the "Billing" tab for MyClient Enterprise



You can change the reseller for multiple customers in bulk, by using the View Customers page:

1. Open the View Customers page
 - You may wish to enable the 'Reseller' column
2. Select multiple customers to reassign and click "edit" on the top bar
3. Use the "Set Reseller" option to change the account's reseller.

Using the View Customers page in this way means that you can more easily make changes in bulk, and take advantage of the "select all" and search features to more quickly find and reassign ranges of customers.

New Account Plans

Overview

MyClient allows your staff and resellers to create new OBM and ACB backup accounts, including customer contact detail, billing rates, and custom plans. A wide range of customisation and branding options are available to ensure that the plans in MyClient reflect exactly what services you offer.

Account plans and plan groups can be managed from the New Account Plans page (available from the Management menu > System Settings link). By default, an "OBM" and an "ACB" plan are available with unrestrictive settings.

Creating a new account plan

Each new account plan you create has a 'base product' of either OBM or ACB. For OBM and ACB accounts, you may configure which server, quota, bandwidth and module options are available, whether or not these options are configurable at all, and whether or not these options are even visible.

APPEARANCE TAB

You may choose which customer data is requested during new account creation. MyClient Enterprise customers have the ability to create and modify custom fields, and require them during new account creation.

New account plans appear as simple buttons on the Add Customers page. However, you may wish to upload an image banner to use instead of the button.

BACKUP SERVER TAB

You may use the Automatic options to automatically place the new account on the server with lowest resource usage. Automatic options are available covering lowest total number of users, lowest total compressed storage, and lowest total allocated quota.

You may set an AhsayOBS 6 User Group to add the new account to, and set a custom User Home for accounts on this plan. These settings are optional; if none are configured, then the settings from the Manage Servers page will be applied. These settings are also optional; if none are configured, then the default settings from the AhsayOBS server will be applied.

You may restrict which backup servers your new account plan can be created on. Note that with MyClient Small Business or greater, you may also restrict which backup servers a reseller has access to. If there are no possible servers after applying both these restrictions, then a conflict resolution process will attempt to choose an appropriate server.

Plan Groups

To choose which resellers can use which plans, you must assign plans into Plan Groups. Then, you can assign a reseller to a Plan Group. The reseller will be able to create new accounts using any of the new account plans within their plan group.

ASSIGNING RESELLERS TO PLAN GROUPS

You can assign a single reseller into a Plan Group from the Manage System Users page > Open a reseller's dialog pane > "Plan Group" setting.

You can make bulk changes to reseller Plan Group settings from the Manage System Users page. Use the browse or search features to find all resellers you wish to update; then click the rows to highlight them, or use the 'select all' link from the top bar; then click the 'edit' link and use the "Plan Group" setting to make changes to all selected resellers at once.

SINGLE PLAN AVAILABLE

If a reseller tries to create a new account and only one plan is available in their Plan Group, then the plan selection screen will be bypassed, going directly to creating the new account plan. You may configure this behaviour on the Manage System Behaviour page > Interface tab > "Show plan selection page for new customers if only a single plan is available" option.

Further reading

EMBED SIGNUP FORM FOR DIRECT SIGNUP

MyClient Enterprise can allow customers to sign up directly. Enterprise licensees may embed the signup form directly into their own website, or provide HTML code for a reseller to embed into their own website. For more information, please see the "Form: External Customer Signup Form" section of the [External forms and API »](#) page.

PRICE PLANS

MyClient Enterprise allows configuring price formulas and applying them to new account plans, so that new accounts are automatically configured with correct pricing.



Reseller Soft Quota

Overview

Many Ahsay businesses choose to allow their larger resellers greater freedom in account management. A common sales model is for a reseller to be allocated a block of storage, to create accounts within as they will. MyClient supports tracking the reseller's aggregate use to monitor and enforce these limits with a Soft Quota system, that does not prevent the end customer from backing up.

Setting up Reseller Soft Quotas

You can set the shared quota limit for a reseller on the Manage System Users page. You can choose a quota limit based on either compressed data usage, uncompressed data usage, or total quota allocated. You may then browse resellers and see at a glance how close resellers are to their assigned limits.

Soft Quota
Assign a soft quota to this reseller's total usage.

Data Us: ▾1500GB

Disabled

Data Usage

Data Usage (uncompressed)

Quota Allocated

Configuring reseller soft quota

When the reseller logs in to your MyClient installation, they will see a summary of their total quota usage on the right-hand side of their homepage.

Restrictions for resellers exceeding limits

By default, there is no consequence for a reseller to exceed their soft limit.

For resellers who are exceeding their combined use, you may choose to prevent them creating new backup accounts. This option is available from the Manage System Behaviour page > System Users tab.

For resellers who have a soft quota based on quota allocation, you may choose to prevent them from exceeding this allocation when creating accounts or changing account quotas. This option is available from the Manage System Behaviour page > System Users tab.

Mail Queue

Overview

Whenever MyClient sends an email, the mail gets placed into the Mail Queue, and then the mail is sent in the background by another process.

This has the advantage of allowing you to disable all outgoing mail until you are satisfied with the branding or content of any outgoing email.

By default, mail queue processing is disabled, as you may not have configured the branding for e.g. email footers.

Old emails are removed from the queue after a period of time has elapsed (normally 21 days) regardless of whether they have been sent or not.

What emails are covered by the Mail Queue?

Mail Queue processing is applied to most bulk emails and alert emails sent by MyClient, including but not limited to

- consolidated daily backup reports to customers,
- watchlist or event log summaries to your staff and resellers

The Mail Queue is bypassed for sensitive emails (such as password resets and transmitting [one-time passwords](#)) and for time-critical emails (such as [server health alerts](#)).

Toggling Mail Queue processing

You may enable or disable Mail Queue processing by clicking the button on the System Maintenance page, or by following the link from the "Mail: Browse History" page.

Before enabling Mail Queue processing for the first time, we recommend clearing any unsent mail from the queue, as this may contain unbranded or sample text and image templates that would be undesirable to send to your resellers and customers.

To clear the mail queue, click the "Delete: all" or "Delete: unsent" links on the top bar of the "Mail: Browse History" page.

See also

- [Backup Reports](#)
- [Email Deliverability](#)



Search Widgets

Overview

Search Widgets are backupset-based charts that appear on the homepage of your MyClient installation. You can create and manage custom Search Widgets for your homepage. Search Widgets are shared between all members of a reseller office.

You can rearrange widgets by dragging on them.

You can click on a bar segment to immediately search for the backupsets within the selected segment.



Figure 1. Example search widget

Create new Widget

1. On the Search Backupsets page, search for a range of backupsets
2. Save the search with a descriptive name
3. On the Manage System Users page > {select reseller}> Search Widgets pane, add the new search as a homepage widget.

Access and Permissions	Search Widgets <small>Configure saved Backupset searches here to view graphical status overviews on the homepage.</small>
Branding	<input type="text" value="My Watchlist"/> <input type="button" value="x"/>
Email branding	<input type="text" value="Backupsets with no schedule"/> <input type="button" value="x"/>
Search Widgets	<input type="text" value="Find Errors"/> <input type="button" value="x"/>
Reseller Information	<input type="text" value="Backupsets with no changes"/> <input type="button" value="x"/>
	add

Figure 2. Configuring selected searches for a reseller

Embedding Search widget in external web application (MyClient Enterprise)

A Search Widget can be embedded in any external web application via the Dashboard system. You can create a Dashboard that uses the Search Widget design and then embed this widget into your own web application. For more information, please see the [Dashboards](#) documentation.

Server Health Monitor

Overview

MyClient helps you sleep easy by monitoring your Ahsay servers, checking for issues every few minutes. When an issue is detected, MyClient can send an alert by email or SMS, or run any custom event handler action.

MyClient includes several separate monitors, helping ensure that you only get alerts when there is a real problem. Each monitor can be enabled for individual servers from the Manage Servers page. When you are working to troubleshoot an issue, you can defer alerts for up to 36 hours.

Server Health Monitoring is available on the MyClient Small Business and MyClient Enterprise plans.

Available Monitors

Each of the following monitors can be enabled or disabled on a per-server basis.

SERVER PING MONITOR

The simplest monitor, this monitor checks to see that the server is connected to the internet and responding to HTTP(s) requests, and measures the latency of requests. You may view current and historical Server Ping information via the "Latency Monitor" page - latency data is recorded even if this monitor is not enabled.

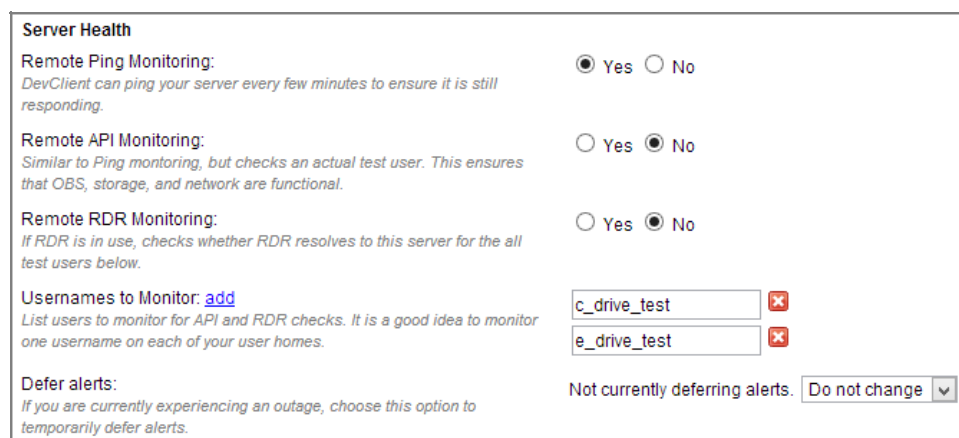
Please note that despite the name, this monitor is based on HTTP(s) not ICMP.

SERVER API MONITOR

This monitor requests OBS information for specific users on the backup server. Use the Manage Servers page to add usernames to monitor. We strongly recommend adding one user for each User Home directory attached to the server. This monitor therefore ensures that OBS is responding to data connections and that all User Homes are available.

SERVER RDR MONITOR

If an AhsayOBS backup server is attached to an AhsayRDR server, it is important to also check that RDR is working correctly. This monitor makes a request to RDR for all the configured usernames, and checks that RDR points the request back to this server. This ensures that RDR is available, responding to connections, and delivering correct results to your customers.



Server Health

Remote Ping Monitoring: ☒ Yes ☐ No
DevClient can ping your server every few minutes to ensure it is still responding.

Remote API Monitoring: ☐ Yes ☒ No
Similar to Ping monitoring, but checks an actual test user. This ensures that OBS, storage, and network are functional.

Remote RDR Monitoring: ☐ Yes ☒ No
If RDR is in use, checks whether RDR resolves to this server for the all test users below.

Usernames to Monitor: [add](#)
List users to monitor for API and RDR checks. It is a good idea to monitor one username on each of your user homes.

Defer alerts: *If you are currently experiencing an outage, choose this option to temporarily defer alerts.* Not currently deferring alerts. Do not change

Figure 1. Server Health Monitor options on a backup server

Configuring Alerts

EMAIL

MyClient emails the "Administrative Alerts" contact addresses when any of the above monitors fail. You may configure the "Administrative Alerts" contact addresses from the Manage System Behaviour page, on the Alerts tab.

SMS

If SMS support is configured for your installation, MyClient sends an SMS message to all of the "Alert SMS addresses" contacts when any of the above monitors fail. For more information on configuring SMS support, please see [Configuring SMS Support »](#).

PREVENTING FALSE POSITIVES

To prevent any transient issues from interrupting your support staff at odd hours of the night, MyClient waits for two consecutive monitor failures before sending an SMS alert. MyClient allows using this behaviour also for email alerts, but we do not recommend this in this case - the monitors use the same processing code as MyClient itself, so if monitors are in a failing state, it is very likely that sync processes elsewhere in MyClient will be failing to work correctly.



Event handlers (MyClient Enterprise)

As well as the above preconfigured alerts, MyClient allows you to run any event handler in response to a server monitor failure. This includes sending email and SMS notifications, but also posting to an external URL, adding diagnostic notes and tickets, and even managing backup accounts and operators.

Each of the above monitors has an associated event source that is triggered upon failure. Simply use the "Server Health Monitor" event sources from the Manage Event Handlers page to handle health monitor failures.

Additional Ping Target

The Additional Ping Target feature allows you to apply the Server Ping Monitor to a target that is not necessarily a backup server. This allows you to make use of MyClient's integrated monitoring and alerting features as well as the Latency Monitor graphs for your non-backup server targets.

This feature allows use of either ICMP or HTTP(s).

You can add an additional Ping Target via the Manage Servers page > "Add a new server" > "Ping Target" button.

Alert on API error

As well as the server-health monitoring features above, MyClient supports sending an email alert when there is an API sync failure communicating with your AhsayOBS servers. This often produces specific error messages regarding individually damaged accounts or individually corrupt profiles. This feature is available for all MyClient licensees and we strongly recommend enabling this feature.

You can configure this feature via the System Behaviour page > Alerts tab > "Send alerts for Sync errors" option.

This option is complementary to the health monitor systems described above. Neither system is a replacement for the other.



Nesting Customers

Overview

MyClientGlobal.com Ltd support staff are often asked whether it's possible to "group" customers together - in particular, licensees coming from competing backup software solutions such as Vembu StoreGrid. Fundamentally, AhsayOBS accounts are separate entities, and we do not want to distort this truth within MyClient. However, there are several ways to achieve this within MyClient.

Internally, MyClient arranges data into the following structure:

- MyClient Reseller
 - MyClient Customer
 - OBM/ACB Backup Account
 - Backupset

Normally MyClient Customers are 1:1 with OBM/ACB Backup Accounts, but this became flexible in order to allow non-backup accounts for billing purposes. Consequently, it's possible to merge multiple OBM/ACB backup accounts into one MyClient Customer.

Looking at this structure, there are three ways you can "merge" accounts in MyClient.

Option 1. Backupset Method (*recommended*)

One AhsayOBS account can be used on multiple computers, so it is possible to use Backupsets instead. This also has the advantage of saving on Ahsay licensing costs. It is possible to move backupsets between existing Ahsay accounts, by modifying files in the User Home directory.

Quota: The Quota feature works correctly across the entire customer.

Customer Access: Customer access is provided by the MyClient Customer portal.

Email Reports: Email reports are provided by MyClient's default mailer system.

This option does have the potential disadvantage that within one customer's account, multiple computers can have limited visibility over each other. One computer would be able to delete backupsets belonging to another computer, and make certain changes to backupset settings. If each backupset is configured to use a different Encryption Key, it would not be possible for one computer to restore data from another computer.

Option 2. Reseller Method

You can "merge" Ahsay accounts by placing them under one reseller. You can reassign MyClient customers to resellers either individually or in bulk.

Quota: Each AhsayOBS account retains their individual quota limits. You can use [MyClient's Soft Quota feature »](#) or AhsayOBS Group Policy in order to create a separate quota limit that applies across all customers.

Customer Access: You can create operators for restricted login into the main MyClient interface, and allow managing and modifying backup account settings.

Email Reports: Email reports are provided by MyClient's reseller mailer system (including Event Log, Watchlist, and All Customer emails).

Option 3. Merge/Split Method

You can merge multiple OBM/ACB accounts into one MyClient customer by using the 'merge/split' link on the right-hand side of a Customer Detail page. This feature allows you to arbitrarily move services between MyClient CRM records.

We have found that some licensees are confused by this feature and so we have not enabled it by default for all MyClient installations. Please let us know if you want this feature to be enabled for your installation.

Quota: Quota is not automatically conjoined. Each AhsayOBS account retains their individual quota limits. You can use AhsayOBS Group Policy to create a separate quota limit, or you can use an Event Handler to alert you when quota crosses a threshold.

Customer Access: The MyClient Customer Portal allows the customer to log in with their existing OBM/ACB credentials, and quickly switch between multiple accounts that have been merged in this way

Email Reports: Email reports are not automatically conjoined, although such a report can be provided by a [custom Event Handler »](#).

See also

- For more information about email reports, please see [Backup Reports »](#).
- For more information about resellers, please see [MyClient Resellers vs AhsayOBS Subadmins »](#).
- For more information about the Customer Portal, please see [Customer Portal »](#).



§4. MyClient Enterprise and above

Automatic Trial Conversion (Ahsay v6 and below only)

Overview

Under certain configuration conditions, AhsayOBS allows you to permanently maintain small backup accounts (5GB or less) in Trial mode without any other limitations. If you are not using AhsayOBS Trial accounts for any other purposes, MyClient can take over managing whether an account is Trial or Paid, in order to save on licensing costs.

Use of the Automatic Trial Conversion feature is **not advised** if you use Trial accounts as part of your ordinary business processes, as MyClient repurposes the Trial feature and takes control over trial assignment.

Once Automatic Trial Conversion is configured, you can freely change backup account quota to below or above 5GB, and the backup account will be automatically converted between Trial and Paid in order to save on licensing costs. MyClient then hides the true trial/paid status.

Due to changes in the way that trials are handled in Ahsay v7, this feature does not support v7.0.0+.

Configuring your AhsayOBS server to support Automatic Trial conversion

AhsayOBS must be configured to support Automatic Trial conversion. The default settings for Trial accounts are infeasible and could allow legitimate backup accounts to be disabled or suspended.

The screenshot shows the 'Enable Free Trial Registration' configuration window. It has three main sections: 'Backup Quota', 'Add-on Modules', and 'Remove User'. In the 'Backup Quota' section, the 'Quota will be reset to 5 Gbytes after 30 Days' option is selected. In the 'Add-on Modules' section, various backup modules are listed with checkboxes, including Microsoft Exchange Server, Microsoft SQL Server, MySQL Database Server, Lotus Domino, In-File Delta, Microsoft Exchange Mailbox, Delta Merge, Continuous Data Protection, Microsoft Windows System Backup, Microsoft Windows Virtualization, VMware VM Backup, Oracle Database Server, Lotus Notes, Volume Shadow Copy, and ShadowProtect System Backup. In the 'Remove User' section, the checkbox is unchecked, and the duration is set to 60 Days after registration. Two blue arrows are overlaid on the image: one pointing to the 'Quota will be reset to 5 Gbytes after 30 Days' option, and another pointing to the 'Remove User' checkbox.

Log in to your AhsayOBS server. On the Manage System > Server Configuration page, make sure the following options are configured;

- Ensure that Backup Quota is set to at least 5 GB
- Ensure that Quota will be reset to as high as possible (currently 5 GB) after any number of days
- Ensure that 'Remove User' is disabled

Configuring MyClient to support Automatic Trial conversion

In MyClient, on the Manage System Behaviour page, on the Backup Accounts tab:

- Set 'Quota threshold to automatically create trial accounts' to the maximum 5 GB limit, or whatever the limit was set to above
- Set 'Apply auto-trials rule in background to all accounts' option to either setting
 - If you have existing accounts that you wish to automatically convert to trial accounts, use the 'Always enforce' option

If MyClient detects that AhsayOBS is incorrectly configured for Automatic Trial conversion, MyClient will disable the Automatic Trial Conversion feature in order to avoid accidentally suspending or disabling legitimate backup accounts.

Alternatives to Automatic Trial conversion

If it is not acceptable for MyClient to take over the trial feature, then leave MyClient's "Quota threshold to automatically create trial accounts" setting at zero, to disable Automatic Trial Conversion. Then, you can work with trial accounts normally within MyClient:

- This allows you to switch accounts between Trial and Paid on the manage backup account dialog
- This allows you to create new backup account plans configured as either Trial or Paid in the New Account Plans configuration
- This allows you to search and filter on Trial or Paid accounts
- This allows you to view Trial/Paid status on a customer detail page
- etc...



Configuration File Decoder

Overview

MyClient Enterprise includes the Configuration File Decoder. This allows you to decrypt the `config.sys` and `profile.sys` files from customer machines in the event of an emergency.

The Configuration File Decoder can be found from the System Maintenance page.

Restoring profile from profile.sys

In the event of corrupted profiles on the AhsayOBS server, you may wish to rebuild a customer's `profile.xml` file from a `profile.sys` file. Simply upload the `profile.sys` file to the MyClient Configuration File Decoder, and check the "Apply necessary changes for profile.xml reconstruction" option.

Restoring Ahsay passwords from config.sys

The `config.sys` file contains customer passwords and backupset encryption keys, for use by the scheduler service. If a customer has forgotten their AhsayOBM or AhsayACB password but still has access to the `config.sys` file, you may decrypt it using the MyClient Configuration File Decoder.

For more information about `config.sys` files, see also [Using Sethost to change backup server without reinstalling »](#)

Configuring Caller ID Support

Overview

MyClient can be used as a Caller ID data source for your PBX system, allowing you to support private phone numbers and prepare accurate information more quickly.

Configuration

To use MyClient as a Caller ID data source, you must enable the "Enable serving Caller ID results" option in your MyClient installation > Manage System Behaviour page > Alerts tab.

Configuring FreePBX to use MyClient Caller ID

[FreePBX](#) is a popular Asterisk distribution providing PBX services. To configure FreePBX to use MyClient Caller ID:

1. Log in to the FreePBX web interface and choose 'CallerID Lookup Sources' from the left-hand menu
2. Create a new lookup source using the following settings:
 - Source Description: MyClient
 - Source Type: HTTP
 - Host: `example.servermanagerpro.com` (*your myclient installation*)
 - Path: `/cnam/`
 - Query: `[NUMBER]`
3. Choose 'Inbound Routes' from the left-hand menu and select your inbound route
4. Select the new source and click 'Submit'
5. Click 'Apply Config' at the top of the page
6. Reload the asterisk dialplan and restart asterisk

Configuring other PBX systems to use MyClient Caller ID

When serving Caller ID results is enabled, MyClient responds to URLs in the form `example.servermanagerpro.com/cnam/555-1234` with a plaintext response message, or an error such as `NO AUTH` or `NOT FOUND (555-1234)`. It should be possible to adapt this information for use in your own PBX system.



Configuring SMS Support

Overview

MyClient may send SMS messages in response to certain actions:

- [Server Health Monitor alerts](#)
- Logging in to MyClient with a single-use code
- Automated event handlers
- And more...

MyClient requires a gateway to be configured before SMS messages can be sent. You may configure SMS gateway options in MyClient on the Manage System Behaviour page on the Gateways tab. MyClient supports sending SMS using one of the following SMS gateways:

Twilio Gateway

[Twilio](#) provide a popular, programmable voice and SMS service in [over 190 countries](#) around the world. If you sign up for a Twilio account, you can use it with MyClient to send SMS messages.

When signing into Twilio, you will be presented with an "Account SID" and "Auth Token" on the home page; please copy them into MyClient on the Manage System Behaviour page along with your Twilio phone number.



Figure 1. Twilio access tokens

As Twilio offers service in many countries, if you are outside of the USA, please ensure that you use the country code prefix (e.g. +64, +61, +44) for all sender and recipient phone numbers.

Email gateway

MyClient also supports using any SMS provider that uses a specific email gateway format. The gateway should deliver an SMS if it receives an email in the following format:

To: recipient@gateway.example.com
From: Specific From Name <specific-from-email@example.com>

SMS body

where "recipient" is the recipient's phone number, and the Specific From Name and Specific From Email are secret parameters configured with the email gateway provider for authentication. MyClient accepts these parameters as "SMS Gateway Address", "SMS Reply Address", and "SMS Reply Name" respectively on the Gateways tab.

One provider that offers an email SMS gateway in this format is [Net24 iSMS](#) in New Zealand.

Custom Gateway

If your SMS provider uses a different gateway format, please contact support to discuss integrating this gateway with MyClient.

Customer Portal

Overview

As part of your MyClient Enterprise installation, you have the option to provide your customers with the benefits of MyClient by integrating the Customer Portal into your website.

The Customer Portal allows your clients to log in and manage their backup account in an easy-to-use and modern interface, without revealing AhsayOBS to the end user. The Customer Portal supports the following features:

- View Backup account status
- Graphical overview of storage and upload history
- Restore files
- View Backupjob history and recent reports
- Modify backupsets using the MyClient Backupset Editor
- Download client software
- Leave support messages, converted to tickets or email
- Fully customisable text and HTML areas
- Fully customisable feature set

This service is included with all MyClient Enterprise accounts.

Demonstration

If you are using MyClient Enterprise, you may test the Customer Portal at the URL https://{your MyClient domain}/customer_portal/. Please also view the preview video on our Video Tour page.



Figure 1. Sample integration of the Customer Portal

Integrating the Customer Portal into your own website

To integrate the MyClient Customer Portal into your own website,

1. Enable the "Allow users to login via web" option on the Manage Servers page in MyClient
2. Add the following lines of HTML into your website template:

```
<iframe src="{your MyClient domain}/customer_portal?theme=blank"
  style="width:1000px;margin:0 auto;border:0;padding:0;min-height:750px;"
  allowTransparency="true" frameBorder="0" scrolling="no">
</iframe>
```

This creates a frame into the Customer Portal within your own website.

The width=1000px CSS parameter may be modified to better fit your own website layout. Once below a certain width, the page rearranges into a single-column layout. You may force a dual-column layout at low widths by adding a e.g. &gw=400 URL parameter.

See also

- [Secure Login Form](#)
- [Embedding MyClient](#)



Embedding MyClient into your own website

Overview

MyClient has several features that allow you to bring MyClient into your own website. These features are available starting with MyClient Enterprise.

Existing Customers

CUSTOMER PORTAL

MyClient provides the Customer Portal, allowing your customers to experience the benefits of MyClient. The Customer Portal can be used as a link (http://cust_home.php), or can be embedded into your own website with an `iframe`. For more information, please see [the Customer Portal documentation](#).

SECURE LOGIN FORM

This is a way to log in to either the Customer Portal, or the AhsayOBS web console, in a secure way that disguises the use of Ahsay software. For more information, please see [the Secure Login Form documentation](#).

Potential Customers

NEW ACCOUNT SIGNUP FORM

This is a version of the new account signup process that can be embedded into your own website with an `iframe`. Access codes can be generated for each reseller, allowing resellers to use this form as well.

For more information, please see the "Form: External Customer Signup Form" section on the [External forms and API documentation](#) page, and create an access key by using the "Configure access to external forms and API methods" page in MyClient.

Staff and Resellers

MYCLIENT EMBEDDED

MyClient allows you to embed the This removes the header and background from the main MyClient portal, making it suitable to embed into your own website with an `iframe`.

For security reasons, MyClient normally detects and attempts to break out of `iframes`. As a result, it is not normally possible to embed the main MyClient portal into your own company website.

To set up MyClient Embedded, change the system graphical template (on the Manage System Branding page) to "Embeddable"; this optimised, streamlined layout is designed to fit easily into your own website.

If you wish to use two Graphical Templates separately, or if you want to brand MyClient separately for one of your resellers, we can offer an additional, separately brandable URL for your MyClient portal. Please see [the pricing page](#) or open a support ticket for more information about adding this feature to your installation.

EMBEDDED SEARCH WIDGET

You can embed a technical overview of customer statuses by combining the Search Widget and Dashboard features. For more information, please see the [Search Widgets](#) documentation.

SIMULATE LOGIN FORM

It's possible to simulate MyClient's login form to allow integrated access to MyClient from within your own website. As given, this technique redirects the full web browser page, and therefore is not compatible with MyClient Embedded as described above.

You can embed the login form by using the following HTML;

```
<form method="POST" action="https://your-myclient-url/">
  <input type="hidden" name="doAction" value="login">
  <input type="email" name="email" placeholder="Email">
  <input type="password" name="password" placeholder="Password">
  <input type="submit" value="Log in &raquo;">
</form>
```

If the reseller's credentials are on file, you can provide SSO using the following HTML;

```
<form method="POST" action="https://your-myclient-url/">
  <input type="hidden" name="doAction" value="login">
  <input type="hidden" name="email" value="reseller-email-address">
  <input type="hidden" name="password" value="reseller-password">
  <input type="submit" value="Log in to MyClient &raquo;">
```



</form>

Please note that the above system is not compatible with the "Require CAPTCHA verification after invalid password attempts" option. You may configure this option from within MyClient on the System Behaviour page > "System Users" pane.

Event Handler examples

Overview

The Event Handler framework in MyClient Enterprise is a great way to automate tasks, create custom reports, and add new functionality to your backup business. Any action in MyClient can cause an event to happen. New actions and events are regularly added to the MyClient, so keep an eye on the [changelog »](#) for updates.

This page is a non-exhaustive list of example solutions built using Event Handlers, that may inspire you in creating more automation in your own installations.

Example 1: Send warning email to staff when a customer exceeds quota

1. Use the Manage Bulkmail Templates page to create a new email template to send.
2. Create the following event handler:
 - Backupjob completed *Where status is: Quota Exceeded* → Send email Template: (your saved template), Recipient: (your own email address)

Note that the "Include Event Details" option includes information about the source of the event; in this case, including the customer's username and basic information about the backupset and backupjob in which the status was detected. This information is reasonably technical. In this case, it is appropriate to choose "Include Event Details" in the event handler. However, in emails sent to the customer, it might not be appropriate to use this option.

Example 2: When a customer exceeds quota, increase quota by 10GB and then revert after 7 days

1. Create the following event handler:
 - Backupjob completed *Where status is Quota Exceeded* → Apply Temporary Quota Change *Quota (GB): 5, Duration: 7 days, Relative: Yes*

You may wish to combine this with the above example to notify you when this action takes place (if multiple events handle the same condition, they will all run).

Example 3: Create a custom daily report

1. Use the Search Backupsets page to find customers and backupsets meeting your criteria
2. Save your search with a descriptive name
3. Create the following event handler:
 - Every day At: 7.00am → Send custom backup report *Select backupsets: (your saved search), Template: Modern, Recipient: (your choice)*

It's important to use a descriptive name when saving your search; partially so that you recall the purpose of the search in future, but also because the event handler uses the name of the saved search as the email subject. This example can be useful for providing a single report on multiple backup accounts to a single customer, keeping tabs on a group of customers, and much more.

Example 4: Create a daily report for a customer with multiple backupjobs per day

1. On the Search Backupjobs page, create the following search:
 - WHERE Customer is (target customer) AND Hours since job end is up to 24 hours
2. Save your search with a descriptive name
3. Create the following event handler:
 - Every day At: 7.00am → Send custom backup job search *Select backupjobs: (your saved search), Recipient: (your choice)*

Example 5: Automatic 10GB permanent quota increase and notification for customers of one reseller using over 80% quota

1. On the Search Customers page, create the following search:
 - WHERE Reseller is (your target reseller) AND Customer Quota Used Percent is over 80%
2. Save your search with a descriptive name (Once you are satisfied that the matched customers should indeed be upgraded!)
3. Use the Manage Bulkmail Templates page to create a new email to send to the customer
 - e.g. "Congratulations, we're upgrading your account by 10GB"
 - Be aware that the name you choose to save this notification as will be used as the subject line for the email.
4. Create the following event handlers:
 - Every hour → Connect to selected backup accounts by Backupset search *Select backupsets: (your saved search)*
 - Event triggered connected to backup account *Event: (the first event)* → Set Backup Account Quota *Quota (GB): 10, Relative: Yes*
 - Event triggered connected to backup account *Event: (the first event)* → Send email to customer *Template: (your saved template), Include Event Details: No*

Note that in this example, the precise event details are not relevant to the customer, and so the "Include Event Details" option should be disabled. This example also highlights the importance of choosing descriptive names for saved items.

It should also be noted that this system will catch accounts that sit between 80% and 100% of quota usage: the earlier examples should also be employed in order to catch customers that exceed quota in a single backup job while starting from below 80%.

Example 6: Tag module changes for later followup



1. Tag a customer with your desired tag, save changes, and then remove the tag again
2. Create the following event handlers:
 - System module added to backup account *Module is: any/all modules* → Add tag to customer *Tag: (your chosen tag)*
 - System module removed to backup account *Module is: any/all modules* → Add tag to customer *Tag: (your chosen tag)*

You can then later find for customers who met this criteria by making a search on the View Customers or View Accounts pages. You are free to extend this concept by adding multiple different tags, or by adding handlers for other events (e.g. automatic module allocation, quota changes, bandwidth changes, or something else).

Example 7: Test SMS support

1. Follow the instructions on [Configuring SMS Support »](#) for your installation.
2. Create the following event handler:
 - User-initiated trigger → Send SMS Message: *test message, Recipient: (your cellphone number)*
 - Click the "Trigger Now" button to run the event.

Example 8: Receive SMS alert when someone uses MyClient to login directly to the backup server

1. Create the following event handler:
 - Operator logged in to backup server → Send SMS Message: *Operator logged in to backup server, Recipient: (your cellphone number)*

Additional details are not appended to SMS messages for potential cost reasons. When you receive this message, you can find out more information by browsing the System Notifications page, which includes information about which operator and backup server are in question.

Example 9: Receive SMS alert when a customer has failed to enter their password on the Customer Portal

After five failed attempts to log in to the Customer Portal, access is blocked to an IP address for up to one hour. By opting to receive an instant notification of this, you can contact the customer and resolve the issue without frustrating them further.

1. Create the following event handler:
 - Customer login triggered bruteforce protection → Send SMS Message: *Bruteforce protection triggered, Recipient: (your cellphone number)*

Example 10: Automatically respond to incoming tickets

1. Create the following event handler:
 - New ticket received by email → Add note to ticket *Message: Sorry, we're currently unavailable!*

Example 11: Automatically close tickets that have not been updated in 7 days

1. On the Tickets page, create the following search:
 - WHERE Days since last update is Over 7 days AND Ticket Status is not Closed
2. Save the search with a descriptive name
3. Create the following event handlers:
 - Every day *Time: 12.00 noon* → Connect to selected tickets *Select tickets: (your saved search)*
 - Event triggered connected to ticket *Event: (the first event)* → Add note to ticket *Message: "This ticket has not been updated in 7 days and will automatically close. Please open a new ticket if you are still experiencing this issue."*
 - Event triggered connected to ticket *Event: (the first event)* → Change ticket status *Status: Closed*

Example 12: Get a weekly report of all customers whose data use has dropped by 50% in the last week

1. On the View customers page, create the following search:
 - WHERE Usage change percent in one week is below -50%
2. Save the search with a descriptive name
3. Create the following event handler:
 - Every week *Day: Monday, Time: 8.30am* → Send customer search as report *Select customers: (your saved search)*

Example 13: Attach the primary reseller to any ticket lodged by a specific reseller

1. Create the following event handler:
 - Ticket newly raised in MyClient → Attach reseller office to ticket *Reseller office: (your primary office)*

The "Ticket newly raised in MyClient" event has a limited set of filters available. However, it is possible to use any custom ticket search query, as evidenced by the following example:

Example 14: Attach reseller A to all new tickets lodged by any reseller, except for reseller B

1. On the My Tickets page, create the following search:



- WHERE Not visible to any member of {reseller A} AND Not visible to any member of {reseller B} AND Ticket state is Open
- 2. Save the search with a descriptive name
- 3. Create the following event handlers:
 - Ticket newly raised in MyClient → Connect to selected tickets (*your saved search*)
 - Event triggered connected to ticket (*the first event*) → Attach reseller office to ticket (*Reseller A*)

Example 15: Send a reminder email to trial accounts after a few days

1. On the View Customers page, create the following search:
 - WHERE Days since account registration is exactly 14 days AND User Trial Status is Trial
2. Save the search with a descriptive name
3. On the Email Templates page, create an email template to send to the customer
 - e.g. "We hope you're enjoying your trial!"
 - You can use the "Company Name" and "Contact Person" macro fields to personalise the email that will be sent
 - The title of the email template will be used as the email subject, so be sure to use an appropriate name
4. Create the following event handlers:
 - Every day at 12.00 → Connect to selected backup accounts by customer search (*your saved search*)
 - Event triggered connected to backup account → Send email to customer by backup account report recipients

As this email will be sent directly to the customer, it is best to not enable the "include event details" option.

Example 16: Automatically retry missed backups (immediately)

1. Create the following event handler:
 - Backupjob completed (*where status is Missed Backup*) → Start backup job

Example 17: Automatically retry missed backups (batched)

1. On the Search Backupsets page, create the following search:
 - WHERE Hours since last job is Up to 24, AND Last Status is Missed Backup AND Backupset Type is FILE
2. Save the search with a descriptive name
3. Create the following event handlers:
 - Every day at 9.00 → Connect to selected backupsets (*your saved search*)
 - Event triggered connected to backupset (*the above event*) → Start backup job

Example 18: Offer to assist customers after they perform a restore

1. Create the following event handler:
 - Restore initiated → Send email to customer by backup account report recipients

Example 19: Send a warning notification to customers who restored data, only if the customer opts in to notifications

1. Tag a customer with a new "Wants Restore Notifications" tag
2. On the View Customers page, create the following search:
 - WHERE (Customer tags) is tagged with "Wants Restore Notifications"
3. Save the search with a descriptive name
4. Create the following event handlers:
 - Restore initiated → Connect to backup account if present in search (*your saved search*)
 - Event triggered connected to backup account (*the above event*) → Send email to customer by backup account report recipients

This is the first example to demonstrate the "if present in search" filter events. These filter events are available for several object types - including backup accounts and backupsets - and allow you to perform arbitrary restrictions based on the full power of MyClient's search system.

Example 20: Send a customer their email report daily on failure, but also send it to another email address every day regardless

This is best achieved by first setting the customer's email report to "daily on failure", and then creating a separate custom report for the email address:

1. On the Search Backupsets page, create the following search:
 - WHERE Customer is (*the chosen customer*)
2. Save the search with a descriptive name
3. Create the following event handler:
 - Every day at 7.00am → Send custom backup report (*your saved search, the customer's email address*)

Example 21: Get an alert whenever an account's quota is changed outside of MyClient

1. Create the following event handler:



- Permanent change to account quota detected on backup server → Send email (*Template, new template e.g. "Mystery quota change!"; Recipient, yourself; do include event details*)

Example 22: Send a monthly email report to a customer about their backup jobs

1. On the Search Backupjobs page, make the following search
 - WHERE Customer is (*selected customer*)
 - AND Days since job start is (*Up to*) 31 days
2. Save the search with a descriptive name
3. On the Manage Event Handlers page, create the following event:
 - Every Month (*on Day 1 at 09:00*) → Send custom backup job search (*your saved search*)
 - The "Calendar" template might be appropriate for a regular email, but the "Compact Grid" option shows more detail. We're happy to introduce additional templates if the current options don't meet your needs

You can test this feature by using your own email address as the recipient, or by viewing the sent email from the "Mail: Browse History" page.

Example 23: Every month, increase quota by 10% for some or all accounts

1. On the View Customers page, make the following search
 - WHERE Customer Name contains *blank*
 - Alternatively, create a more restricted search that will find only the customers who should receive this quota increase.
2. Save the search with a descriptive name (i.e. "Customers to receive auto quota increase")
3. On the Manage Event Handlers page, create the following events:
 - Every Month (*on Day 1 at 09:00*) → Connect to selected backup accounts by Customer search (*your saved search*)
 - Event triggered connected to backup account → Set quota to formula (*quota * 1.1*)

External Forms and API

Overview

MyClient Enterprise allows you to create deeper integration with your own systems by providing external forms and API methods. Each form or method is protected by an access token, which can be generated from the "External forms and API methods" link on the "System Settings" page.

External Forms

OVERVIEW

External forms are embedded into your own website by adding an HTML snippet.

When creating the access token for a form, you may optionally specify a URL to redirect to when the form has been completed. If no URL is entered, upon completion the form will display the content set in an appropriate template.

EXTERNAL CUSTOMER SIGNUP FORM

MyClient allows you and your resellers to embed the Customer Signup form into your own website. By specifying a reseller when creating the access token, the form will display the selected plan group and automatically assign the new customer to the correct owner.

If the form is completed and no redirect URL is specified by the access token, this form displays the content from the "New Customer Confirmation (external form)" template.

To embed the Customer Signup form, use the following HTML code:

```
<iframe src="https://YOUR-MYCLIENT-INSTALLATION/ext.signup_customer/?apikey=ACCESS_TOKEN" style="width:800px; border:0; margin:0; padding:0;" allowTransparency="true"></iframe>
```

API methods

OVERVIEW

API Methods allow you to perform certain actions by making an HTTP POST request to a specific URL on your installation `https://YOUR-MYCLIENT-INSTALLATION/API/external`. Each API request requires a range of parameters depending on the selected API call. The parameters should be posted in application/x-www-form-urlencoded format.

Responses are returned as JSON in the form `{"status": integer, "message": "string"}`, or in XML format if `?xml` is added to the URL. The status code ranges from 200-299 upon success, and 400-599 upon error. The message parameter provides a human-readable English description of any errors, or may contain a more complex object depending on the API call in question.

CONNECTIVITY TEST

This API allows you to verify your network connectivity and authentication credentials against the MyClient server.

Parameter	Description
action	Must be ping
auth	A valid access token

EVENT HANDLER

This API allows you to run any configured Automated Event Handler relation. To use this API, create an Automated Event Handler to respond to the event source "Web request to MyClient API Endpoint".

Parameter	Description
action	One of event OR event-username OR event-backupset OR event-backupjob
auth	A valid access token
api	The call to make, as specified in the Automated Event Handler
loginname	(Optional) Ahsay Username. Mandatory if the action parameter was event-username, event-backupset or event-backupjob.
backupset	(Optional) Ahsay Backupset ID. Mandatory if the action parameter was event-backupset or event-backupjob.
backupjob	(Optional) Ahsay Backupjob ID. Mandatory if the action parameter was event-backupjob.

EXPORT DATA

This API allows you to retrieve the result of a search. A successful response is delivered in CSV or JSON format.

Parameter	Description
action	Must be export
auth	A valid access token



Parameter	Description
search	One of search-customers-ahsay, search-customers-shadowprotect, search-customers-asigra, search-customers-comet, search-customers-allservices, search-backupsets (Ahsay), search-backupjobs (Ahsay), search-shadowprotect-volumes or search-servers (Ahsay)
sid	A search ID. You may retrieve this from the URL bar when viewing a saved search in MyClient.
json	(Optional) Set this parameter to true to return JSON formatted data instead of CSV.

CREATE RESELLER OFFICE

This API allows you to automatically create a new Reseller Office with one system operator.

Parameter	Description
action	Must be create-reseller-office
auth	A valid access token
office-name	The company name for the new reseller office
operator-first-name	System Operator's first name
operator-last-name	System Operator's last name
operator-email	System Operator's email address, used to log in with
operator-password	(Optional) System Operator's password. Must conform to your configured system password policy
permission-group-id	(Optional) Permission group ID for this reseller office. The Group ID can be found in the Overview tab for a permissions group under System Settings -> Permission Groups

AHSAY: CREATE ACCOUNT

This API allows you to create a new Ahsay account. The created account will be added to a new MyClient record. The created account follows the same processes used when creating an account from within MyClient, including respecting your settings regarding email alerts, usergroup overrides, server selection and welcome emails.

A successful response from this API will include a GUID that can be used in successive MyClient API calls. An unsuccessful response from this API will include a human-readable error message, tailored to the level of access granted by the supplied access token.

Parameter	Description
action	Must be ahsay-create
auth	A valid access token
email	The customer's email address
username	Username for the new account
password	Password for the new account
quota-gb	Quota for the new account. Must be a positive number of gigabytes
is-trial	(Optional) Whether to create the account in Trial mode. Must be either "Y" or "N". Default "N"
client-type	(Optional) Must be either "OBM" or "ACB". Default "OBM"
bandwidth	(Optional) Speed restriction for the new account in kilobytes/sec. Default zero (unlimited)
customer-name	(Optional) The customer's full company name
phone	(Optional) The customer's contact phone number
first-name	(Optional) The first name for the primary contact person
last-name	(Optional) The last name for the primary contact person
address1	(Optional) The customer's address
address2	(Optional) The customer's address, continued
address3	(Optional) The customer's address, continued
address-city	(Optional) The customer's city
address-country	(Optional) The customer's country
address-postcode	(Optional) The customer's postcode
plan-name	(Optional) The plan this customer will use
reseller-name	(Optional) The reseller to be assigned to this customer. Ignored if the reseller's office name is not unique or the 'auth' access token doesn't belong to the primary office.

AHSAY: LIST ALL ACCOUNTS

This API allows you to list Ahsay accounts. The information returned contains a GUID necessary to refer to this account in other API calls. Information can be returned in JSON or XML forms as described earlier in this document.

This API will only return a list of direct customers. Access tokens for resellers who are parent resellers of other sub-resellers will not see their subreseller customers included in the results from this API call.

This API call will return the following fields for each matching Ahsay account:

- id, a GUID that can be used to refer to this Ahsay account in other API calls



- username, the username by which this account logs in to their Ahsay client software
- type, the string ACB or OBM depending on the Ahsay account's client type
- quota, the currently effective quota for the account measured in bytes
- usage, the currently effective usage for the account measured in bytes

Parameter	Description
action	Must be ahsay-get-info-multi
auth	A valid access token

AHSAY: RETRIEVE INFORMATION ABOUT SPECIFIC ACCOUNT

This API allows you to retrieve specific information about an Ahsay accounts. For more information about the results produced, please see the documentation for the ahsay-get-info-multi API call. This call requires that the reseller in question would normally have permission to view this customer within the main MyClient portal.

Parameter	Description
action	Must be ahsay-get-info
auth	A valid access token
guid	The API GUID for the Ahsay account in question. Can be retrieved via the ahsay-get-info call.

AHSAY: SUSPEND / UNSUSPEND AHSAY ACCOUNT

This API allows you to suspend or unsuspend Ahsay accounts. This call requires that the reseller in question would normally have permission to perform this action.

Parameter	Description
action	Must be ahsay-suspend or ahsay-unsuspend
auth	A valid access token
guid	The API GUID for the Ahsay account in question. Can be retrieved via the ahsay-get-info call.

AHSAY: ERASE AHSAY ACCOUNT

This API allows you to erase an Ahsay account, removing all data from the backup server. This call requires that the reseller in question would normally have permission to perform this action.

Parameter	Description
action	Must be ahsay-erase
auth	A valid access token
guid	The API GUID for the Ahsay account in question. Can be retrieved via the ahsay-get-info call.
confirm	Must be confirm-erase

AHSAY: CHANGE QUOTA

This API allows you to modify the quota for an Ahsay account. This call requires that the reseller in question would normally have permission to perform this action.

Parameter	Description
action	Must be ahsay-modify-quota
auth	A valid access token
guid	The API GUID for the Ahsay account in question. Can be retrieved via the ahsay-get-info call.
quota_gb	Set the quota for this account. The value should be a number of gigabytes.

See also

- [PHP Sample code for API methods »](#)
- The [Customer Portal »](#) is another form that can be embedded into your own website.



Accounting features in MyClient Enterprise

Overview

MyClient Enterprise introduces a significant number of new features above other plans. As well as dashboards, leads management, and advanced customisation and management features among others, MyClient Enterprise also includes some accounting features.

However, MyClient is not a billing system. There are a large number of different payment rules in different countries, and significant effort would be required to support a range of payment gateways and tax rules. Moreover, every company has subtly different business practices regarding billing that we feel it is best to leave billing support to a dedicated solution. We have also found that MyClient is often used by established companies who already have billing processes in place.

MyClient Enterprise does include a number of accounting features aimed at tracking customer billing in line with service received. However, this support does not extend as far as tracking customer payments.

Accounting Features available in MyClient Enterprise

The following billing-related features are available to MyClient Enterprise installations:

TRACK AND EXPORT

MyClient allows you to set billing information for your customers, so that you may track billing details in line with services received. You may export billing information by using any custom search from the View Accounts page.

Depending on your own business arrangement, customers might be billed directly or via their reseller. MyClient uses the Billing Agent field to determine who is responsible for paying the account; if the Billing Agent is the primary office, then the customer is directly responsible. You can make bulk updates to the Billing Agent field by using the View Customers page.

CRM AND SERVICE MODEL

Conceptually, a customer CRM record in MyClient can have a number of attached services; from OBM/ACB backup accounts, to general billing accounts, to a MyClient reseller account, as well as other products and services.

MyClient allows creating general customers which do not have an attached backup account. These customers may have other products or services attached to them and can appear in billing exports. This allows you to account for non-backup service charges against your customers or resellers.

Likewise, from a billing perspective, a MyClient Reseller is simply a CRM record with an attached MyClient Reseller service. This allows you to add billing items directly against the reseller (e.g. bulk storage charge; minimum customer pricing).

ALERTS

MyClient allows specifying a Billing Alerts contact, to receive email notification of any billing change. Billing changes also trigger an event source, which can be configured using the Manage Event Handlers page to perform any action of your choice - such as tagging the customer for later search, modifying other properties of the account, creating a note or ticket for service, or sending an external alert or SMS.

PRICE PLANS

MyClient allows you to define a price formula, and apply the formula to a new account plan template. When new customers sign up on a specific plan template, the price plan formula will be applied to their billing settings.

Price formulas can be specified in common math syntax, as well as supporting Excel-style formulas such as IF, AND, OR, MIN, MAX etc. The price formula system provides macros for the customer's quota, modules, and other properties, as well as an intuitive, easy-to-use live editor which displays simulated price changes in real time as you type.

You may create Price Plans on the Manage Price Plans page; and assign them to new account plans on the New Account Plans page.

Experimental Account Feature Add-ons

The following billing-related features are available as optional extras to your MyClient Enterprise installation:

- Support for creating invoices
 - This experimental feature includes support for search, export, email, automation, and custom management
 - Invoices can be PDF or HTML format
- Support for prompting for payment details during account signup, including credit card information
 - MyClient is not a payment processor and does not store credit card information. Any sensitive information is securely encrypted using asymmetric PGP and emailed to a billing contact.
- Dedicated import/export templates for integration with the Xero accounting platform



Price Formula Syntax

Overview

MyClient allows you to describe your prices using a formula. The formula can refer to the customer's usage and account details using a variety of simple and advanced constructs, allowing you to succinctly and correctly model your billing rates within MyClient.

You may then apply a Price Formula to a New Account plan; assign New Account plans to a reseller's Permission Group; and then have the reseller create new backup accounts and reconfigure existing backup accounts onto the selected New Account Plan to apply the Price Formula to the customer.

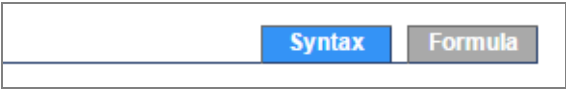
Editor features

MACROS

MyClient interpolates a customer's quota, modules, and other information into the Price Formula formula by use of macros. A number of predetermined macros are defined. You can easily embed a macro using the buttons on the top bar of the formula editor.

SYNTAX HELP

MyClient offers syntax help with Price Formulas at any time, by choosing the "Syntax" tab from the top bar.



LIVE PREVIEW

MyClient also offers a Live Preview of your Price Formula. This feature allows you to immediately simulate applying the price to a customer to ensure the result is as you would expect.

Live test

For a customer with GB quota and                 module(s),

\$75.00



Syntax

OVERVIEW

Write formula using a conventional syntax. Respects brackets and order of operations. Note that for your safety, division by zero produces a zero.

FUNCTIONS

The following excel-style functions can be used:

Function	Description
IF ()	Accepts two or three arguments; if the first argument is 1, returns the second argument; otherwise, returns the third argument (or zero if it is not present).
MAX () , MIN ()	Accepts any number of arguments, returns the largest or smallest of them all
AND () , OR ()	Accepts any number of arguments, returns 1 or 0 if all or at least one are nonzero
CEIL () , FLOOR ()	Accepts one argument, returns the number rounded up or down
SEGMENT ()	Accepts at least two arguments. This function segments a value into price breaks. The first argument is the value to segment by price breaks, followed by price-per-amount, price-break-level, price-per-amount repeated as necessary.

EXAMPLES

Example | Syntax ----- | ----- Flat fee \$50 | 50 \$0.80 per GB | 0.8 * \$quota Lookup table | IF (\$quota = 5, 20, 0) +
IF (\$quota = 10, 28, 0) +
IF (\$quota = 15, 34, 0) \$20 flat rate,
\$1.50/GB first 10GB,
and \$0.50/GB after | 20 + MIN(10, \$quota)*1.50 + MAX(\$quota - 10, 0)*0.50
or (alternative)
20 + IF (\$quota > 10, 10, \$quota)*1.50 + IF (\$quota > 10, \$quota - 10, 0)*0.50
or (alternative)
20 + SEGMENT (\$quota, 1.5, 10, 0.5)

AhsayRDR support

Overview

MyClient supports connecting to your AhsayRDR servers to enable specific additional functionality. You can connect an AhsayRDR server to MyClient from the Manage Servers page.

Please be aware that connecting MyClient to an AhsayRDR server is not a substitute for connecting it to your AhsayOBS servers, and doing so will not automatically sync account and backupset data. A future update to MyClient will make it possible to retrieve AhsayOBS details directly from your AhsayRDR server.

Features

By connecting MyClient to an AhsayRDR server, you enable the following additional features:

- Presence Check
- Accounts not currently checking in
- RDR Health Monitor
- Use RDR URLs in Autoclient-generated software instead of direct AhsayOBS URL
- One-click login
- Centralise view of software version numbers

This list was last updated on 2014-12-04. If significant time has passed since then, please contact us for an updated list.



Secure Login Form

Overview

Our Secure Login Form allows you to integrate secure client access to your website, without making it obvious that your services are built on AhsayOBS.

- The target URL is not provided to the client's browser until a correct username and password are provided, allowing extra security and brute force protection.
- You may use the Secure Login Form to protect access to the Customer Portal, access to the AhsayOBS User Portal, or to any URL of your choice.
- This also allows customers on multiple AhsayOBS servers to log in at a single URL without needing AhsayRDR to mediate the access.

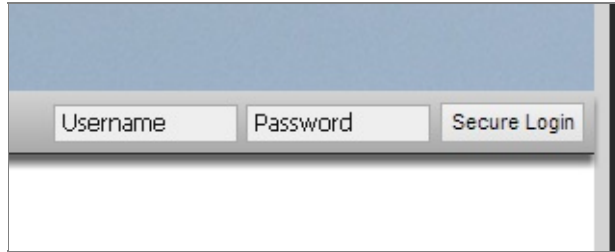


Figure 2. Sample integration of the Secure Login Form

Configuring the Secure Login Form

To integrate the MyClient Secure Login Form into your own webpage, simply add the following lines of HTML to your website template. This creates a frame into the Secure Login Form within your own website.

To configure the Secure Login Form, visit your MyClient installation. On the "Edit Servers" page, the dialog for each individual server presents a "Web Login URL" section. You may use the following settings:

- Set URL to a page containing the Customer Portal.
 - The customer will automatically be logged in to the Customer Portal by the Secure Login Form.
- Set URL to the AhsayOBS User Portal.
 - The customer will automatically be logged in to the AhsayOBS User Portal by the Secure Login Form.
- Specify any URL.
 - The customer will automatically be logged in to the Customer Portal by the Secure Login Form.

HTML code for Secure Login Form

- HTML (transparent/grey theme)

```
<iframe src="{your MyClient Domain}/http/external_login.php"
  frameborder="0" scrolling="no" style="height:25px;width:284px;border:0;"
  allowTransparency="true">
</iframe>
```

- HTML (blue theme)

```
<iframe src="{your MyClient Domain}/http/external_login.php?theme=thmBlue"
  frameborder="0" scrolling="no" style="height:25px;width:284px;border:0;">
</iframe>
```

- HTML (custom)

```
<script type="text/javascript" src="{your MyClient Domain}/http/external_login.js"></script>
<form action="?" method="POST" onsubmit="return MyClient_login(this);">
  <input type="text" name="loginName" placeholder="Username" />
  <input type="password" name="password" placeholder="Password" />
  <input type="submit" value="Login &raquo;" />
</form>
```

Regarding Custom HTML

When using the "HTML (custom)" version above, it is not possible to modify the form's target attribute. The customer must be redirected within the same browser context. If the target is set to e.g. `_top`, the interaction of cross-domain policy and asynchronous requests cause the browser to lose trusted input context, and the new `_top` window will be blocked by the browser's popup blocker. The solution in this case is to follow the above embedding instructions for the Customer Portal to keep the customer on your own website.

See also



- [Customer Portal](#)
- [Embedding MyClient](#)



Tags, Custom Fields, and Billing Properties

Overview

Many licensees find themselves in a situation of needing to group customers together. MyClient provides several features to enable this, all with slightly different characteristics.

CHOOSING BETWEEN SOLUTIONS

- Use Billing Fields if there are a set of options, and each customer *is* exactly one of the options.
 - e.g. Service Level; each customer is either Low, Medium, High Service Level
- Use Tags if a customer might- or might not- fall into certain categories.
 - e.g. Belongs to industry A; contacted during promotion B; affected by issue C
- Use Custom Fields if free text entry is needed on every single customer
 - e.g. other system ID

Tags

OVERVIEW

Tags are a more free-form solution than Custom Fields or Billing Properties. You may assign zero or any number of tags to a customer.

- You can create new tags simply by entering free text in a Tag option.
- You can search to find customers and backupsets for where a customer is tagged with a certain tag.
- You can browse through existing tags from the System Settings page > Tags.

The Tag system is also available to sales staff to use for the Leads and CRM views in MyClient.

Tags are not shared across resellers, each reseller sees their own individual tags only.

SET FOR ONE USER

You can set tags for one user from the customer's detail dialog window, in the lower right-hand corner. Type into the box (autocomplete is provided over already-existing tags) and press the Enter key to register the tag.

SET IN BULK

You can tag customers in bulk from the View Accounts and View Leads page.

You can also tag customers in bulk by using an Event Handler:

1. Search for all customers you wish to tag, save this search with a descriptive name
2. Create the following Event Handlers:
 - User Initiated Trigger → Connect to accounts in saved search *{your saved search}*
 - Event triggered connected to customer *{the above event}* → Tag customer with your tag
3. Click the 'Trigger Now' button
4. Verify that the customers are tagged, and remove the now unnecessary rules

SET AUTOMATICALLY

You can set tags using an Event Handler in response to any system event, including new account creation.

Custom Fields

OVERVIEW

A Custom Field is a free text field that you can enter for each of your customers. You may wish to use this for textual information, billing details, information for searching, or metadata for integration with other systems.

At the time of writing, MyClient allows up to five Custom Field definitions. You may configure Custom Field definitions from within MyClient on the System Settings page > System Behaviour > Data Binding tab > "Custom fields on customers" option.

SET FOR ONE USER

You can set a Custom Field for one user from the customer's detail dialog > Overview tab in the lower right-hand corner.

SET IN BULK

At the time of writing, there is no facility to set Custom Fields in bulk.

SET AUTOMATICALLY



You can set Custom Fields automatically for new accounts as part of the New Account Plan configuration. At the time of writing, there is no Event Handler available to set the value of a Custom Field.

Billing Properties

OVERVIEW

A Billing Property is a drop-down field that you can set for each of your customers.

At the time of writing, MyClient allows up to five Billing Property definitions, as well as three built-in definitions (named "Billing Frequency", "Review Frequency", and "Payment Method").

- You may configure Billing Property definitions from within MyClient on the System Settings page > System Behaviour > Data Binding tab > "Custom billing fields on customers" option.
- You may then configure available dropdown options for each definition from the System Settings page > Billing Fields.

SET FOR ONE USER

You can set a Billing Property for one user from the customer's detail dialog > Billing tab in the upper right-hand corner.

SET IN BULK

At the time of writing, there is no facility to set Billing Properties in bulk.

SET AUTOMATICALLY

You can set Billing Properties automatically for new accounts as part of the New Account Plan configuration. At the time of writing, there is no Event Handler available to set the value of a Billing Property.



Dashboards

Overview

A Dashboard in MyClient is a custom interface that displays an overview of a selection of backupsets.

The default style is a "10-foot" design that is intended for use on a TV or projector display in a shared office area, allowing a quick visual display of this information.

The Dashboard feature is available to all MyClient Enterprise customers.

Creating a Dashboard

You can create and manage your Dashboards via the System Settings page > Dashboards button. Dashboards can be configured with the following options:

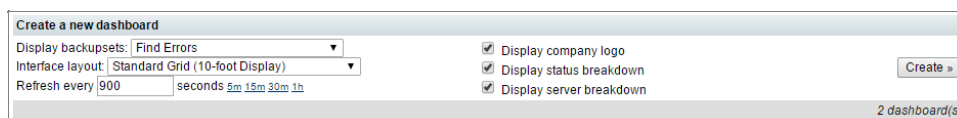


Figure 1. Configuring Dashboard options

DISPLAY BACKUPSETS

Dashboards are based on saved searches from the "Search Backupsets" page. A Dashboard can be based on one of the default saved searches (e.g. My Watchlist; Find Errors; or Backupsets With No Schedule) or it can be based on any custom saved search (e.g. all backupsets for a specific customer).

INTERFACE LAYOUT

This option controls the design of the Dashboard. We recommend the standard option. Additional Dashboard templates may be made available in the future. For more information about the alternative Overview Pie-chart option available here, please see the [Search Widgets](#) documentation.

REFRESH EVERY

The dashboard will automatically refresh with the latest status information for these backupsets. We recommend the default 15 minutes, however, this can be increased or decreased as necessary.

OPTIONAL WIDGETS

The dashboard can contain a sidebar containing additional widgets. You can add or remove these additional widgets as necessary.

Viewing your Dashboard

Once the Dashboard is created, an Access Token is generated. This is a URL that allows direct access to view the dashboard without being logged in to MyClient. You can load this URL in a full-screen web browser on your display device.

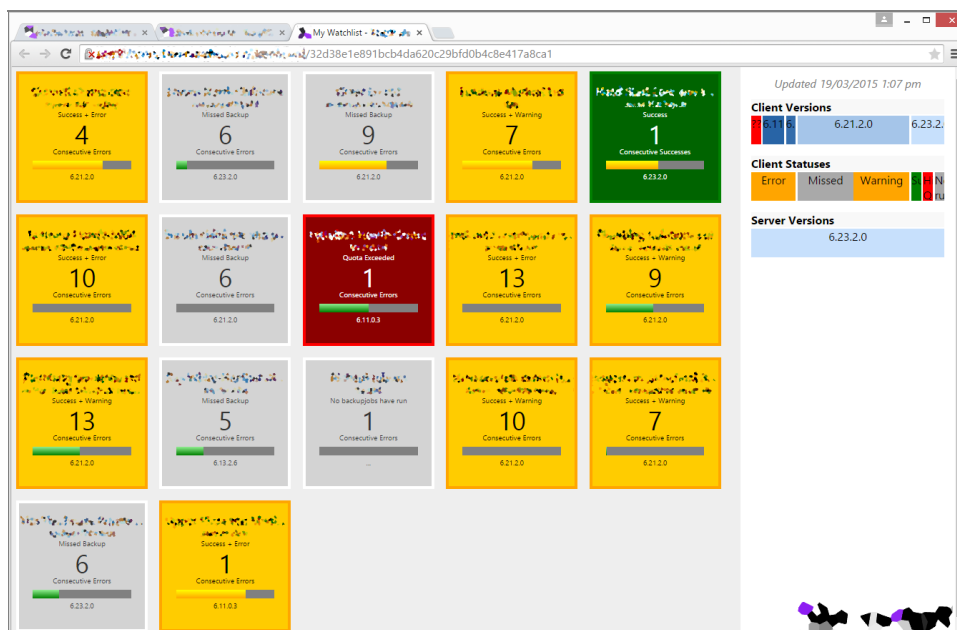


Figure 2. Example dashboard

Pricing setup guide

Overview

This guide walks you through setting up pricing in MyClient.

Price Formula Configuration

MyClient allows you to create your own custom price formulas for your customers and resellers. These price formulas can also be used in conjunction with [our sign up form](#) to create a seamless experience for new customers.

Our dynamic pricing system once configured allows your customers' balance to move up and down as their usage does, or any other situation that you define.

STEP 1 - CREATING YOUR PRICE FORMULA

Management > System Settings > Price Formulas

The example below shows a scaling price formula, as usage increases or decreases MyClient can accordingly update the usage charge. (click to expand)

Price Formula "Standard Pricing"

Price Formula "Standard Pricing" Syntax Formula

Manage price formula

Name: Standard Pricing

Formula

Insert macro: Quota Usage (GB) Uncompressed Usage (GB) Backups

0 +
if(\$quota = 5 , 55 , 0) +
if(\$quota = 10 , 75 , 0) +
if(\$quota = 25 , 95 , 0) +
if(\$quota = 50 , 140 , 0) +
if(\$quota = 100 , 175 , 0) +
if(\$quota = 150 , 295 , 0) +
if(\$quota = 200 , 325 , 0) +
if(\$quota = 300 , 450 , 0) +
if(\$quota = 400 , 525 , 0) +
if(\$quota = 500 , 615 , 0) +
if(\$quota = 750 , 915 , 0) +
if(\$quota = 1000 , 1150 , 0)

Live test

For a customer with 5 GB quota and the formula results in

\$55.00

The following is an example of a price formula that could be used for a fixed setup fee (e.g. for \$100):

100

The following is an example of a price formula that could be used for \$/gb usage (e.g. for \$3.50/GB):

3.5 * \$quota

STEP 2 - CREATING YOUR ACCOUNT PLAN

Management > System Settings > Account Plans

From this area you can create any number of account plans for your customers and resellers. To get started select 'Add new plan' then enter your description for the plan. The following screen will allow you to configure your plan settings, we suggest taking some time to work through each area.

The Price Formula tab allows you to configure the charges for the plan. From each drop-down you can choose your price formula or associated charge that you have created in the Price Formulas area.

After Creation

- 'Remain fixed at creation time' - This option will cause the price to be calculated once, at creation time, and remain fixed thereafter.
- 'Auto update from the formulas above (copied/linked)' - With these options, the formulas configured for the plan will be linked or copied to the new account. This means that if the plan is later updated to use different formulas, these new formulas will not be applied to the account. i.e pricing is tied to the formula that was in use at the time of account creation.



- In the case of the 'linked' option, any changes made to the formula (via the price formulas editor) will be applied to the account.
- In the case of the 'copied' option, the formula will be copied to the account at the time of creation, meaning later changes to that formula (via the price formulas editor) will NOT be applied to the account, and instead any pricing formula change for that account will have to be made directly in the billing configuration for that account.
- 'Auto update from the formulas in this plan' - With this option, the current formulas configured for this plan will be applied at all times. This means that if different formulas are selected for this plan, these new formulas will be applied, and if the formulas attached to this plan are altered (via the price formulas editor), the altered formulas will be applied. i.e pricing is tied to the plan.

STEP 3 - ASSIGNING YOUR NEW PLAN TO A PERMISSION GROUP

Management > System Settings > Permission Group

Permission groups define the level of functionality that customers and resellers can access in the portal. Choose or create the permission group you wish to attach your account plan to, under 'New Accounts' select your desired plans to attach them.

Applying Price Formulas to Existing Accounts

To apply these price plans to an already-created OBM/ACB account, open the customer's detail dialog and switch to "Billing" tab, then in the "Services" section change the desired billing categories select your desired price plan in the dropdown. Clicking the save will apply changes and recalculate price values.

See also

- For more information about price plan syntax and creating more complex price plans, please see [Price Formula Syntax](#)
- For more information about accounting features in MyClient Enterprise, please see [Accounting features in MyClient Enterprise](#)

§5. Add-ons for MyClient Enterprise and above

Bannersync (Automatic AdGroup Management)

Overview

If you have a large number of reseller customers across several servers, you will appreciate the hassle of managing large numbers of AdGroups with AhsayOBS. MyClient can dramatically simplify the co-branding process by automatically creating, managing, and assigning AdGroups for all resellers across all backup servers.

MyClient can automatically create identical AdGroups for each reseller across all your backup servers, with their up-to-date contact information and logo.

Configure banner for a reseller

The generated AdGroup can be customised from the Manage System Users page. The default image configuration is "Use email logo, or fallback"; this means that if the reseller has a custom email banner logo, it will be resized and converted to an AdGroup banner; otherwise if no email banner logo is present, a system-wide or [brandset-wide](#) fallback image will be used. This fallback image can be customised from the System Branding page.

To configure the image used for a reseller:

- Select the reseller on the Manage System Users page
- On the Branding pane, set "Create AdGroup using image" to "Custom image"
- Save the dialog window, and then upload a custom banner image

To disable AdGroups for a reseller:

- On the Branding pane, change "Create AdGroup using image" to "Do not create"
- Change "Default AdGroup for new customers" to "(None)"
- Save the dialog window

Apply changes to the backup server

Any changes to the reseller's contact details or to their configured AdGroup image settings necessitate updating AdGroups on the backup server and refreshing AdGroup settings for reseller customers. AdGroup synchronisation is incremental; although it may take some time for the first batch of AdGroups to be created, successive updates should take only a very small amount of time depending on the number of changes since.

To apply changes immediately:

- Visit the System Maintenance page
- Click the "Create all custom AdGroups on servers" link
- Once completed, click the "Reassign all customers to Adgroups" link

To have changes automatically applied:

- Visit the Manage System Behaviour page > "Data Binding" pane
- Enable the "Automatically reassign customer's AdGroup when reseller changed" option
- Enable the "Automatically create and reassign AdGroups for all customers" option

To apply changes immediately to only a subset of customers:

- On the System Maintenance page, click the "Create all custom AdGroups on servers" link
- On the View Customers page, search and find the customers you wish to refresh
- From the top bar, choose 'select all'; then choose 'edit'; then use the Set AdGroup option to refresh the AdGroup to the per-reseller default

Notes

Some additional Bannersync settings can be configured from the Manage System behaviour page > "Data Binding" pane > "Automatic AdGroup Management" section.

MyClient simulates a web login to your AhsayOBS server during this process. As a result, this process is incompatible with [URL Rewriting](#) unless you also specify AhsayOBS credentials in MyClient. If you encounter any unexpected errors during the sync process, you can blacklist creating these AdGroups on a single server by disabling the "Allow syncing AdGroup banners to this server" option from the Manage Servers page.

In any case if the image to use is not the exact correct size for a fixed-size AdGroup image, the uploaded image will be resized against a white background.

See also

- [Autoclients](#)
- [Brandsets and Multiple URLs](#)



Brandsets and Multiple URLs

Overview

Brandsets are additional skins for your MyClient portal. You can re-brand your MyClient installation using a reseller's logo and colors, with separate text templates, layout, and image branding. Your MyClient installation already has one brandset (the current theme).

Each brandset must be applied to an **additional URL**.

Brandsets

MyClient allows you to add multiple brandsets to your installation. There is a small charge for this - please see [the pricing page](#) for details.

Brandsets change

- the interface template,
- any banner and interface images,
- all text templates under the 'Web Interface' section of the Manage Branding page,
- the system language,
- your replacement brand names for AhsayOBM, AhsayACB, and Ahsay,
- your portal's own brand name

With a compelling use case, we are happy to update MyClient to allow configuring any other setting on a per-brandset-skin basis.

Once you have configured an additional brandset, you must configure the URL as a "preferred URL" for the reseller, so that any changes to images, language, and portal URL will be reflected in email reports. See the "Setting URLs used for email reports" section below for more information.

Multiple URLs

Each brandset must be applied to an additional URL. It's necessary to give each branding a separate URL, so that the brandset skin can be applied on the login page, download page, customer portal and on any other pages before the reseller has logged in. Using multiple URLs also helps enhance the branded experience.

MyClientGlobal.com can supply additional *.servermanagerpro.com addresses freely for any brandset; or you may wish to [use your own domain](#).

Setting URLs used for email reports

If you have purchased an additional URL for your installation, MyClient must choose which URL to use for email reports.

MyClient allows you to choose which URL will be used for email reports at the global level, for systemwide alerts; and also at the permission-group level, for applying reseller-specific branding.

- For system alerts, via the System Settings page > System Behaviour > System Users tab > "Default system URL for all background notifications" option
- For email alerts, via the System Settings page > Permission Groups > {select a group} > Branding tab > "Preferred URL for reseller" option

See also

- [Autoclients](#)
- [Bannersync \(Automatic AdGroup Management\)](#)



LDAP (Active Directory) Support

Overview

Many MyClient partners use an LDAP server (such as Microsoft Active Directory) to manage staff accounts. By connecting MyClient to your LDAP server, your staff and resellers can log in to MyClient using their central domain credentials.

Benefits

- Domain administrators can centrally control access to MyClient
- Password changes in the domain are immediately reflected in MyClient
- New staff members in the domain can log into MyClient without any further effort
- Supports Microsoft Active Directory, OpenLDAP, IBM Tivoli and any standards-compliant LDAPv3 implementation
- Any LDAP clause can be connected to any MyClient reseller group

This feature complements AhsayOBS' own LDAP support for end-customer logins, allowing you to create a complete LDAP-based Ahsay infrastructure.

Availability

LDAP integration is available for any existing MyClient Enterprise subscriber at no additional cost. For more information about enabling this feature for your MyClient installation, please contact support.



StorageCraft ShadowProtect support in MyClient

Overview

MyClient is a comprehensive portal for administering your Ahsay backup business. It provides customer support and troubleshooting, reseller management, server monitoring, automation, CRM and more all within a single interface.

MyClient supports the DR product StorageCraft ShadowProtect for interested partners.



Many descriptions in this document will be familiar to experienced users of MyClient for Ahsay.

ShadowProtect features

MyClient supports the following features for ShadowProtect customers:

- Arrange managed-folders into arbitrary groups
- Simplify details down to just usage, retention and quota values (like AhsayOBS. Full details obviously still available)
- Allow staff and resellers to view and search through the statuses of their ShadowProtect customers
- Daily consolidated email reports
- Monitoring Priorities
- Server health alerts - custom action processing whenever a server goes offline (sms, email, webhook, ...)
- Full integration with MyClient CRM for notes, tickets and other features
- Find unmanaged folders on the ImageManager server
- SPF Chain Visualiser
- Find managed folders with unexpected retention settings
- Automatically add unmanaged folders

Configuring your ImageManager servers

OVERVIEW

MyClient reports on the state of one or more central ImageManager servers via the MyClient ShadowProtect Connector software. You can download the latest version of the Connector from the Manage Servers page in MyClient. The download includes instructions on installing and configuring the software.

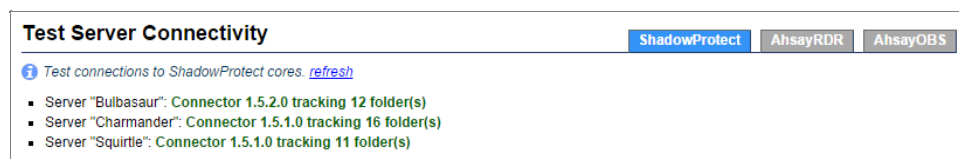
You may connect MyClient to either an on-site or off-site ImageManager server. The MyClient ShadowProtect Shuttle software assists you in connecting to on-site ImageManager servers behind NAT or firewalls.

ADDING AND MODIFYING IMAGEMANAGER SERVERS

On the Manage Servers page, click "add server". If ShadowProtect support is configured for your MyClient installation, you should see the "Add ShadowProtect Connector" button. Enter connection details for your ImageManager server.

SYNCHRONISING

MyClient will automatically connect to the ImageManager connector in the background, to retrieve user and volume image chain details from it. You can ensure that MyClient is successfully connecting to your ImageManager servers by using the "Test Connections" link at the top of the Manage Servers page.



You can immediately synchronise your ImageManager connectors to MyClient at any time, by using the "resync" button at the top of the Manage Servers page.

Data structure overview

MyClient organises all Managed Folders into an account structure as follows;

```
MyClient Customer
|- AhsayOBM account
|   |- Backupset
|       |- Backupjob
|       |- Backupjob
|   |
|   |- Backupset2
|
|- ShadowProtect account (*)
    |- Managed Folder
        |- Base image and chain
        |- Base image and chain
    |
    |- Managed Folder2
```

The "ShadowProtect account" object is an artificial construct that is used to group Managed Folders. You may configure quota values and backup report recipients at the "ShadowProtect Account"-level.

Any managed folder can be grouped into any ShadowProtect account, regardless of which ImageManager connector it resides on. This allows you to have multiple offsite ImageManager servers for a single customer; or to have a single ImageManager server shared between multiple customers.

The ShadowProtect account is linked into a standard MyClient Customer CRM record. This allows you to leave notes and tickets on the customer, change their contact and address details, view map data, use complex search and export tools, and so on.

NEWLY DETECTED MANAGED FOLDERS

By default, newly detected Managed Folders are automatically assigned into a new ShadowProtect under a new MyClient customer. You may then move them under existing records.

Alternatively, if all the Managed Folders on your ImageManger server are structured in the basic form `path\to\CUSTOMER-NAME\MANAGED-FOLDER-NAME\`, then MyClient can use this structure as information to determine that the new Managed Folder should automatically be assigned to an existing ShadowProtect Account. If you are using storage in this form, you can enable this option from the Manage System Behaviour page > "ShadowProtect Accounts" tab > "Assign newly detected managed folders to existing accounts" option.

UNMANAGED FOLDERS

If your Managed Folders do use the aforementioned folder structure, you can scan for all folders matching this template that are not managed by ImageManager. To do so, use the "Check Folders" tab from the server dialog on the Manage Servers page in MyClient.

Organising your newly attached ImageManager servers

OVERVIEW

Because of the above, when you first connect MyClient to your ImageManager servers, some customers may be split across multiple MyClient CRM records. This section describes how to merge and organise the created ShadowProtect accounts for a customer which has multiple Managed Folders.

1. IDENTIFY MANAGED FOLDERS BELONGING TO THE SAME CUSTOMER


From the menu, choose Customers > View ShadowProtect Customers. This page lists all ShadowProtect accounts and allows searching by a number of criteria.

Because newly detected Managed Folders may be assigned to new ShadowProtect accounts under new MyClient customers (as above), there may be a number of extraneous rows here that should be merged.

2. MERGE MANAGED FOLDER INTO ONE SHADOWPROTECT

Click one of the duplicate rows, to visit the Customer Detail page.

In the "ShadowProtect Account" section, there is a grid listing all Managed Folders under this ShadowProtect Account. Click the managed folder's name to open the managed folder's properties.

Managed Folder	Chains	Total	Free
WebServerA 	355 GB	388.3 GB	1.3 TB
Total	355 GB	388.3 GB	1.3 TB

[manage shadowprotect account settings »](#)

Change the "Assigned to" option to point to another ShadowProtect account under your control; then save and close the dialog.

3. REMOVE UNNEEDED SHADOWPROTECT ACCOUNT



This MyClient customer record now contains an ShadowProtect account with no Managed Folders underneath it.

Click the button to remove the ShadowProtect account.

4. REMOVE UNNEEDED MYCLIENT CUSTOMER RECORD

This MyClient customer record now contains no attached services. You can remove this entire customer record by clicking the delete button and authorising the action using your MyClient credentials.

5. VERIFY MIGRATION

If you return to the "View ShadowProtect Customers" page, you should now see your merged customer has a greater number of managed folders. Click through to your merged customer, to ensure that more than one Managed Folder appears under the "ShadowProtect Account" grid.

Managed Folder	Chains	Total	Free
WebServerA	355.1 GB	388.4 GB	1.3 TB
WebServerB	25.1 GB	66.5 GB	1.3 TB
AppServerA	50.5 GB	159.6 GB	1.3 TB
Total	430.7 GB	614.5 GB	1.3 TB

[manage shadowprotect account settings »](#)

You may wish to rename this MyClient customer to better indicate its purpose. This name may also appear on any email reports. As with any other MyClient customer record, you can update the customer details by using the "edit" link on the right-hand side of the customer detail page.

Usage, Retention, and Quota values

MyClient automatically determines "Usage", "Retention", and "Quota" values for each ShadowProtect account, to provide a simple AhsayOBS-alike interface for your ShadowProtect customers. By default, these values are determined by the total size of all images required to reach the most recent image; the total size of all images not required to reach the most recent image; and by the remaining free space on the ShadowProtect repository, respectively. Alternatively, you may manually set the Quota value to any level.

To manually set the Quota for a customer:

- Click the "Manage ShadowProtect account settings >>" link on the customer's detail page
- Set the Quota value, then save and close the dialog

Managing ShadowProtect backups


OVERVIEW

Monitoring ShadowProtect backups is based upon the time since last image.

MONITORING PRIORITIES

Each volume can have a configured Monitoring Priority, determining the number of days' grace allowed before reporting on the fact.

You can set the Monitoring Priority for each volume by clicking the link on a ShadowProtect volume on a customer detail page:

 **WEBSERVERA > D Volume**
Using 248.2 GB for 134 image(s) in chain
Shortest path to most recent image takes 219.4 GB
Latest image: 17/09/2014 2:00 pm
Actions: [View chain](#) | [Standard](#) | [Add note](#)

FINDING PROBLEMATIC VOLUMES

You can then find all problematic volumes at a glance, by looking at the coloured time overviews on the "Search ShadowProtect Volumes" page (accessed under the Monitoring menu). This page can be searched and sorted to help identify problematic volumes.

Future work in this area will include an Event Log-style view, allowing for advanced troubleshooting of your ShadowProtect customers without leaving a single page.

ShadowProtect for your resellers

BRANDING

By default, "ShadowProtect" is referred to as "DR" throughout the system. You may wish to use your own brand name for the ShadowProtect product. The brand name can be replaced from the System Settings page > System Branding > "ShadowProtect brand name" option.

ENABLE FEATURE



By default, ShadowProtect support is only enabled for the Primary permission-group. To allow your resellers to see the "View ShadowProtect Customers" page and to view and manage their ShadowProtect customers, you must enable the ShadowProtect feature for them via the Permission Groups page > {select group} > MyClient Interface tab > "Allow reseller customers to view and manage their existing ShadowProtect customers" option.

Assign ShadowProtect accounts to resellers

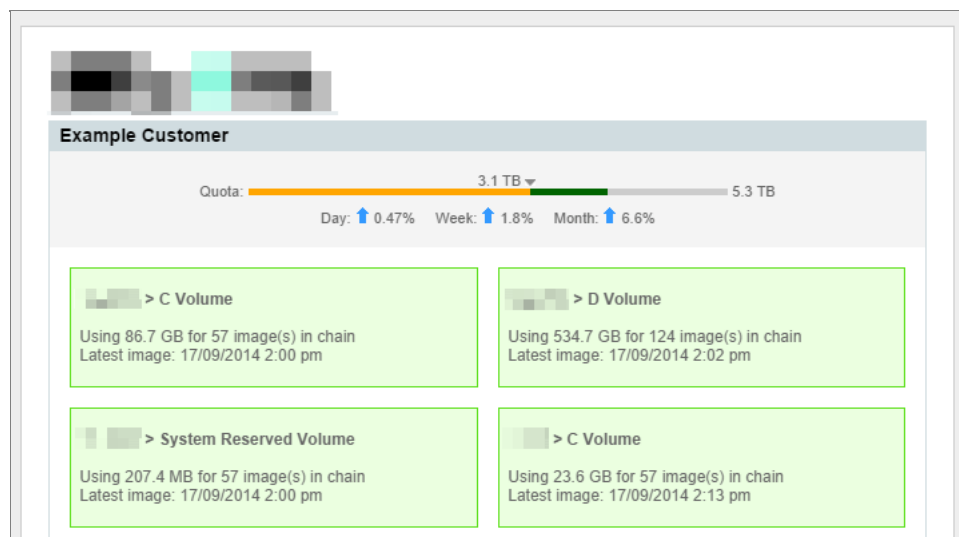
By default, all the created ShadowProtect accounts are assigned to the Primary reseller. To allow your resellers access to view and manage their own customers, you may reassign the reseller for the relevant MyClient customers. You can do this via the customer's detail dialog. For more information, please see the standard MyClient documentation.

Email reports for ShadowProtect

MyClient supports sending email reports to your ShadowProtect accounts. Each email report contains a summary of the current status of all volumes on all Managed Folders for the account. No email recipients are configured by default; and as a result, no emails are sent to your customers until this is enabled.

PREVIEWING REPORTS

You can preview the report that would be sent, by clicking the "reports: preview" link on the right-hand side of the Customer Detail page. This email report can be fully branded and customised for each reseller; please refer to standard MyClient documentation for more information on this process.



CONFIGURING RECIPIENTS

At present, you may configure email report recipients by clicking the "Manage ShadowProtect account settings >>" option on the Customer Detail page. Once email report recipients are added, emails will be sent at the standard customer email time as configured on the System Behaviour page.

This differs from Ahsay where the email report recipients can be configured from the customer's dialog > People tab. We expect to consolidate these behaviours to make them more consistent across products in the near future.

Server Health Alerts

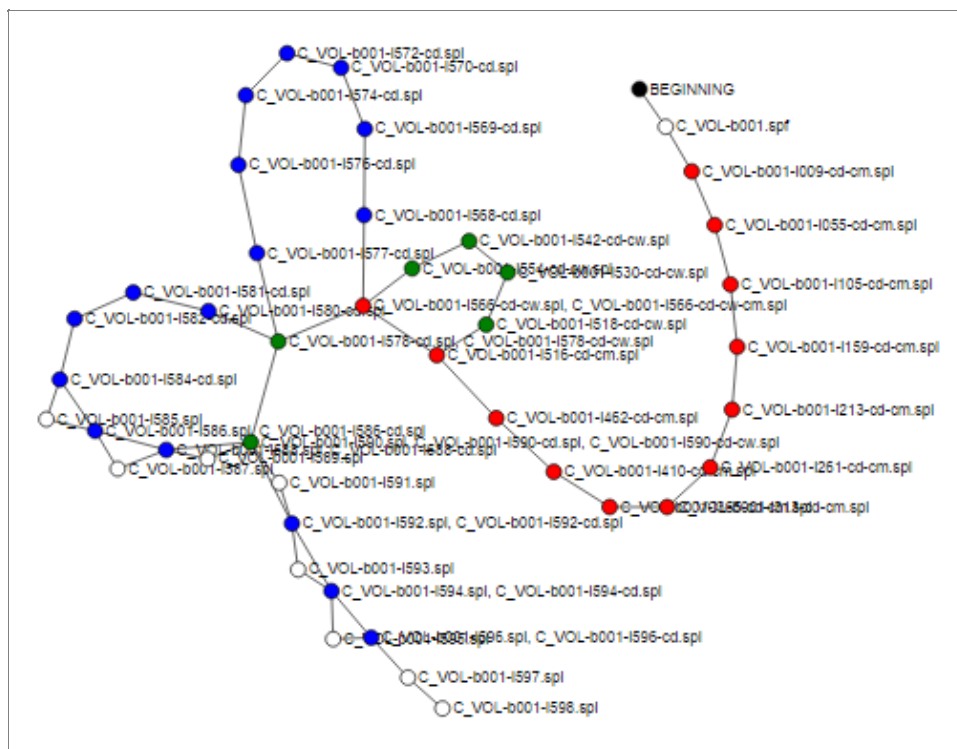
MyClient periodically connects to your ImageManager servers to retrieve updated information about Managed Folders and Recovery Points. In the course of these periodic checks it may discover that an ImageManager server is unavailable or not responding. You can choose for MyClient to automatically alert you in this case.

MyClient supports this via the Event Handler system. For more information about Event Handlers, please see the standard MyClient documentation.

You may connect to the "Error communicating with ShadowProtect Connector" event source to detect ShadowProtect errors.

Chain Visualiser

The Chain Visualiser allows you to see at a glance the relationship between incremental files in the Managed Folder.



This example demonstrates a volume chain spanning approximately 50 increments. Properties of the chain can be seen by tracing paths on the image. For this customer, it is clear that there is one `spf` base image; followed by a chain of consolidated-monthly images; followed by a few consolidated-weekly images and consolidated-daily images, down to unconsolidated increments towards the leaf nodes. This image also demonstrates that certain pathways are redundant; to save space, they could be pruned manually or automatically, at the expense of losing restore points.

Compatibility testing procedures for new versions of ImageManager

The Connector software has been developed since the v5 timeframe and has undergone many revisions since. It remains compatible with v5 and v6 versions of ImageManager.

Our basic testing process for new versions will involve at minimum

- Ensure no major changes present
 - Check release notes for new features that may impact the architecture of the Connector software
 - Check file/folder structure to ensure that files have not moved
 - Check that the interface remains largely similar
- Ensure functioning of MyClient and the Connector
 - Resync in MyClient and check for sync errors
 - Check that the updated ImageManager version number appears
 - Check that existing customers appear
 - Enable all columns on the View ShadowProtect Customers page and the View ShadowProtect Volumes page and ensure that all columns contain valid data
 - Check that it is still possible to use the View Chain feature
 - Check that it is still possible to use the Browse Reports feature

The above checks are sufficient to verify all network API endpoints provided by the Connector software. If all the above checks succeed, the implementation means that all the underlying infrastructure of MyClient, the Connector software, and ImageManager have not undergone massive changes and are basically working as expected.

If any of the above checks fail, MyClientGlobal.com Ltd may need to investigate further the cause of the issue. It should be possible to resolve any problems by issuing an update to the Connector software.

No issues have been experienced with the above checks throughout all v5 and v6 versions of ImageManager. As a result of this experience, it is confidently expected that there will be no major issues when upgrading within v6 versions of ImageManager. However, no guarantees are yet made about a potential v7 version if such version is released in the future. This document will be updated if such version is released in the future.

Future work



MyClientGlobal.com are actively investing in the development of this feature. We are seeking feedback from selected partners to help guide our development in a way that will be most useful.



Dell Appassure support in MyClient

Overview

MyClient is a comprehensive portal for administering your Ahsay backup business. It provides customer support and troubleshooting, reseller management, server monitoring, automation, CRM and more all within a single interface.

MyClient supports the DR product Dell Appassure for interested partners.



Many descriptions in this document will be familiar to experienced users of MyClient for Ahsay.

Appassure features

MyClient supports the following features for Appassure customers:

- Arrange protected-machines into arbitrary groups
- Simplify details down to just usage and quota values (like AhsayOBS. Full details obviously still available)
- Allow staff and resellers to view and search through the statuses of their DR backup customers
- Daily consolidated email reports
- Monitoring Priorities
- Server health alerts - custom action processing whenever a server goes offline (sms, email, webhook, ...)
- Full integration with MyClient CRM for notes, tickets and other features

Configuring cores

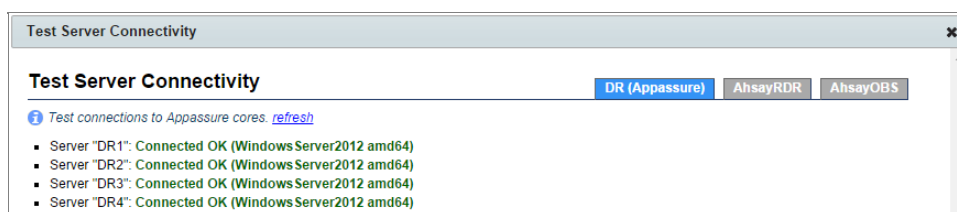
ADDING AND MODIFYING CORES

On the Manage Servers page, click "add server". If Appassure support is configured for your MyClient installation, you should see the "Add DR core" button.

Enter connection details for your DR core. MyClient can connect to either a primary or a replica core containing your protected machines. You should not connect MyClient to both a primary and a replica core containing the same protected machines.

SYNCHRONISING

MyClient will automatically connect to the Appassure core in the background, to retrieve user and recovery-point details from it. You can ensure that MyClient is successfully connecting to your Appassure cores by using the "Test Connections" link at the top of the Manage Servers page.



You can immediately synchronise your Appassure cores to MyClient at any time, by using the button at the top of the Manage Servers page.

SINGLE SIGN-ON

MyClient allows one-click login access to your Appassure cores by clicking the link on the right-hand side of the Manage Servers page. This allows you to centralise access to your Appassure cores. Any use of this feature is logged on the System Notifications page, and can be automatically actioned via connected events on the Manage Event Handlers page.



Data structure overview

MyClient organises all Protected Machines into an account structure as follows;

```
MyClient Customer
|- AhsayOBM account
|   |- Backupset
|       |- Backupjob
|       |- Backupjob
|   |
|   |- Backupset2
|
|- Appassure account(*)
    |- Protected Machine
    |   |- Recovery point
    |   |- Recovery point
    |
    |- Protected Machine2
```

The "Appassure account" object is an artificial construct that is used to group Protected Machines. You may configure quota values and backup report recipients at the Appassure account-level.

Any protected machine can be grouped into any Appassure account, regardless of which core it resides on. This allows you to have multiple cores for a single customer; or to have a single core shared between multiple customers.

The Appassure account is linked into a standard MyClient Customer CRM record. This allows you to leave notes and tickets on the customer, change their contact and address details, view map data, use complex search and export tools, and so on.

Newly detected protected machines are automatically assigned into a new Appassure account under a new MyClient customer. You may then move them under existing records.

Organising your newly attached cores

1. IDENTIFY PROTECTED MACHINE BELONGING TO THE SAME CUSTOMER

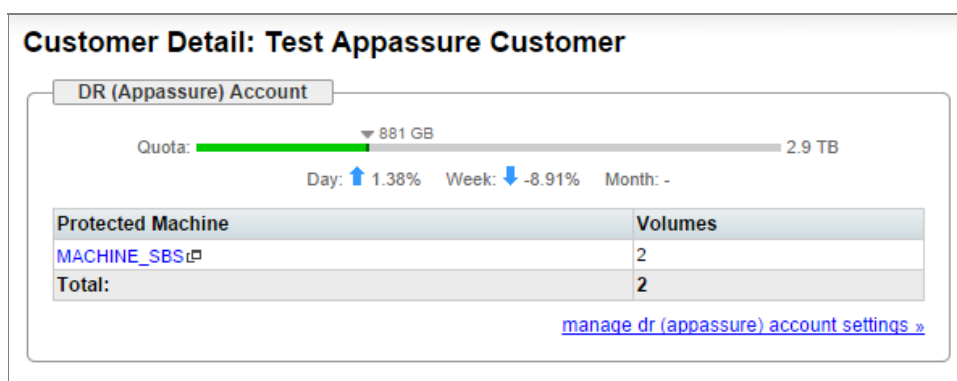
From the menu, choose Customers > View DR Customers. This page lists all Appassure accounts and allows searching by a number of criteria.

Because newly detected Protected Machines are assigned to new Appassure accounts under new MyClient customers (as above), there may be a number of extraneous rows here that should be merged.

2. MERGE PROTECTED MACHINE INTO ONE APPASSURE ACCOUNT

Click one of the duplicate rows, to visit the Customer Detail page.

In the "DR Account" section, there is a grid listing all Protected Machines under this Appassure Account. Click the protected machine's name to open the protected machine's properties.



Change the "Assigned to" option to point to another Appassure account under your control; then save and close the dialog.

3. REMOVE UNNEEDED APPASSURE ACCOUNT

This MyClient customer record now contains an Appassure account with no Protected Machines underneath it.

Click the button to remove the Appassure account.

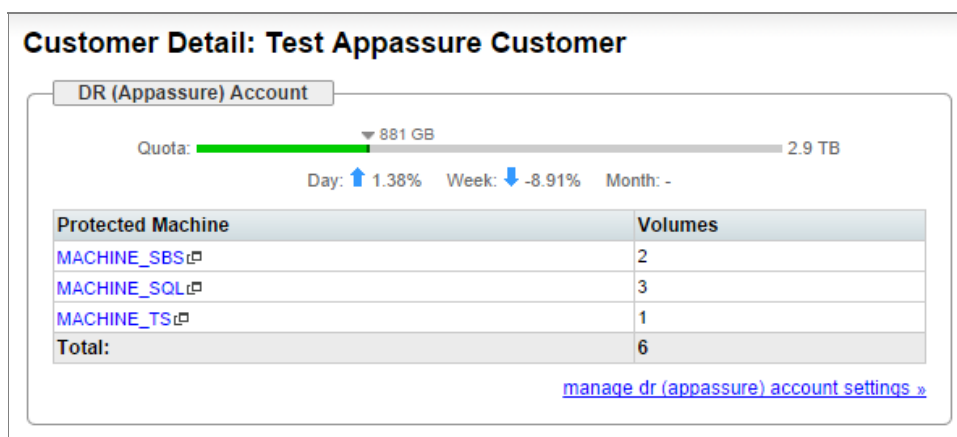
4. REMOVE UNNEEDED MYCLIENT CUSTOMER RECORD

This MyClient customer record now contains no attached services. You can remove this entire customer record by clicking the delete button and authorising the action using your MyClient credentials.



5. VERIFY MIGRATION

If you return to the "View DR Customers" page, you should now see your merged customer has a greater number of volumes. Click through to your merged customer, to ensure that more than one Protected Machine appears under the "DR Account" grid.



You may wish to rename this MyClient customer to better indicate its purpose. This name may also appear on any email reports. You can update the customer details by using the "edit" link on the right-hand side of the customer detail page.

Usage and Quota values

MyClient automatically determines "Usage" and "Quota" values for each Appassure account, to provide a simple AhsayOBS-alike interface for your Appassure customers. By default, these values are determined by the sum of all recovery point sizes, and by the remaining free space on the Appassure repository. Alternatively, you may manually set the Quota value to any level.

To manually set the Quota for a customer:

- Click the "Manage DR account settings >>" link on the customer's detail page
- Set the Quota value, then save and close the dialog

Managing Appassure backups

OVERVIEW



It is not possible to retrieve schedules for a protected machine if the core is a replica. As a result, MyClient is not able to determine "missed backups" as is available in AhsayOBS.

Monitoring Appassure backups is therefore based upon the time since last recovery point.

MONITORING PRIORITIES

Since it is not possible to retrieve schedules if a core is a replica, MyClient does not automatically know the appropriate time to warn you about when an Appassure backup is no longer in a healthy state. You can indicate your timeline boundaries to MyClient by using the Monitoring Priorities feature. Each volume can have a configured Monitoring Priority, determining the number of days' grace allowed before reporting on the fact.

You can set the Monitoring Priority for each volume by clicking the link on a DR volume on a customer detail page:

 **PROFSQL > DATA (E:\)**
Last recovery point: 27/07/2014 6:00 pm
10 restore point(s) over 45 days storing 375 GB
288.9 GB data currently on volume
Actions: [Add note](#) | **Critical (1)** 

FINDING PROBLEMATIC VOLUMES

You can then find all problematic volumes at a glance, by looking at the coloured time overviews on the "Search DR Volumes" page (accessed under the Monitoring menu). This page can be searched and sorted to help identify problematic volumes.

Future work in this area will include an Event Log-style view, allowing for advanced troubleshooting of your Appassure customers without leaving a single page.

Appassure for your resellers

BRANDING

By default, "Appassure" is referred to as "DR" throughout the system. You may wish to use your own brand name for the Appassure product. The brand name can be replaced from the System Settings page > System Branding > "Appassure brand name" option.



ENABLE FEATURE

By default, Appassure support is only enabled for the Primary permission-group. To allow your resellers to see the "View DR Customers" page and to view and manage their Appassure customers, you must enable the Appassure feature for them via the Permission Groups page > {select group}> MyClient Interface tab > "Allow reseller customers to view and manage their existing DR customers" option.

Assign Appassure accounts to resellers

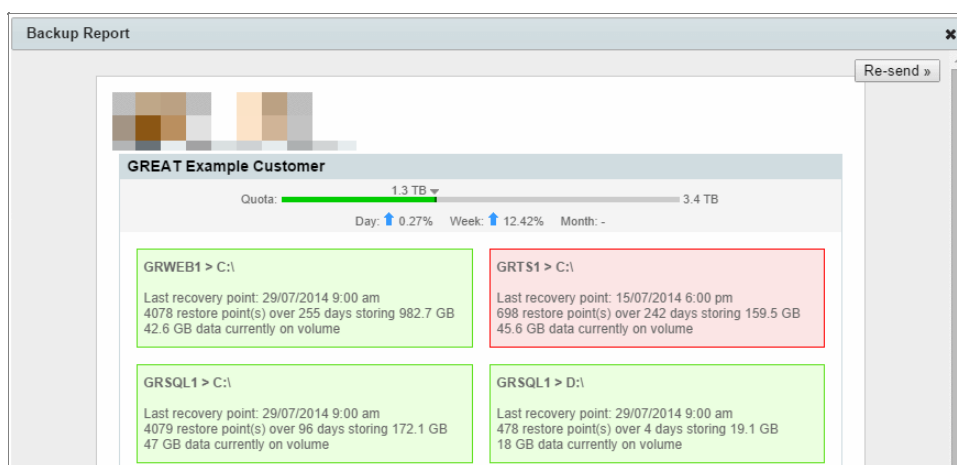
By default, all the created Appassure accounts are assigned to the Primary reseller. To allow your resellers access to view and manage their own customers, you may reassign the reseller for the relevant MyClient customers. You can do this via the customer's detail dialog. For more information, please see the standard MyClient documentation.

Email reports for Appassure

MyClient supports sending email reports to your Appassure accounts. Each email report contains a summary of the current status of all volumes on all protected machines for the account. No email recipients are configured by default; and as a result, no emails are sent to your customers until this is enabled.

PREVIEWING REPORTS

You can preview the report that would be sent, by clicking the "reports: preview" link on the right-hand side of the Customer Detail page. This email report can be fully branded and customised for each reseller; please refer to standard MyClient documentation for more information on this process.



CONFIGURING RECIPIENTS

At present, you may configure email report recipients by clicking the "Manage DR account settings >>" option on the Customer Detail page. Once email report recipients are added, emails will be sent at to the standard customer email time as configured on the System Behaviour page.

This differs from Ahsay where the email report recipients can be configured from the customer's dialog > People tab. We expect to consolidate these behaviours to make them more consistent across products in the near future.

Server Health Alerts

MyClient periodically connects to your Appassure cores to retrieve updated information about Protected Machines and Recovery Points. In the course of these periodic checks it may discover that an Appassure core is unavailable or not responding. You can choose for MyClient to automatically alert you in this case.

MyClient supports this via the Event Handler system. For more information about Event Handlers, please see the standard MyClient documentation.

You may connect to the "Error communicating with DR core" event source to detect Appassure errors.

Future work

MyClientGlobal.com are actively investing in the development of this feature. We are seeking feedback from selected partners to help guide our development in a way that will be most useful.

We could add the feature to add new Appassure customers directly within MyClient. However we understand most partners use dedicated core devices for each customer, and the consequent hardware provisioning is partner-dependent. Unless you have a general shared-core infrastructure for your customers, this would not be a feasible addition.



Asigra support in MyClient

Overview

MyClient is a comprehensive portal for administering your Ahsay backup business. It provides customer support and troubleshooting, reseller management, server monitoring, automation, CRM and more all within a single interface.

MyClient additionally supports Asigra for interested partners. Many descriptions in this document will be familiar to experienced users of MyClient for Ahsay.



Asigra features

MyClient supports the following features for Asigra customers:

- Unified view of backupsets that only appear on the DS-System or only on the DS-Client. The DS-NOC's interface does not make it clear that this information is separated, meaning customer problems can easily slip through the gaps if only the DS-NOC is used.
- Arrange DS-Clients into customers
- View customer detail, storage history, and backupset history using MyClient's familiar interface
- Search and filter DS-Client records, backupsets, and backupjobs using MyClient's familiar interface
- Full integration with MyClient CRM for notes, tickets, customer contact details, and other features
- Sync either all/only-selected DS-Systems on a DS-NOC
- One-click SSO login to your Asigra DS-NOC
- Rebrand Asigra product name
- Summarise reseller statistics on the Manage System Users page
- Salesgroup Sync with MyClient resellers
- Backupset Editor (read-only)
- Monitoring Priorities
- Event Handlers
- Hover feature on the Search Backupsets page
- Refresh single customer
- Event Log
- Summarise totals in data grid footer
- Homepage search widgets ("Donut graphs")

Configuring your Asigra servers

OVERVIEW

MyClient connects to DS-NOC. At this stage, our integration has been developed against Asigra DS-NOC versions 12.x and 13.x.

ADDING A DS-NOC

You can connect MyClient to your DS-NOC via the Manage Servers page > "Add a new server" > Asigra DS-NOC.

The "Create customer records" option controls how new MyClient customer records are automatically created based on information from the DS-NOC server. If you generally have one Account group per customer, we recommend setting this option to "Per Account Group". If you generally have one DS-Client per customer, we recommend setting this option to "Per DS-Client" (default). If you have a mix of the two systems, it is easy and possible to rearrange customers after the sync process.

If you have multiple MyClient installations and want to manage individual DS-Systems from different MyClient installations all from a single DS-NOC, you can use the "Sync with DS-Systems" option. This option allows you to sync with only selected DS-System servers within a single DS-NOC.

Once you are satisfied with the connection settings, click the save icon to save the server.

TEST CONNECTION

You can verify that MyClient is able to connect with your DS-NOC server, via the Manage Servers page > "Test connections" > "Asigra" tab > "Refresh" link. This dialog will let you know about any communications issues that may prevent syncing information between MyClient and your DS-NOC server.

SYNC

MyClient will automatically sync information in the background with your Asigra DS-NOC. This sync happens at automatic nonconfigurable intervals. Different information is synced at different rates depending on how likely it is to have changed.

If at any point you wish to manually force a re-sync, to provide MyClient with the most up-to-date information, you can do so via the Manage Servers page. Click a row to highlight it, and then click the "resync" link in the top bar.

At first, MyClient will only retrieve backupjob information from the last one or two days. Historic information will not be imported into MyClient. The usefulness of MyClient will increase over time as it keeps up-to-date with new and updated backupjobs.



Working with Asigra customers

OVERVIEW

The Asigra support in MyClient enables (A) viewing Asigra customer detail information, as well as (B) the following report views.

If you have menu items configured in task-based orientation, the items are available in the following locations;

- Customers \ View Asigra Customers
- Monitoring \ Search Asigra Backupsets
- Monitoring \ Search Asigra Backupjobs

If you have menu items configured in service-based orientation, the items are available in the following locations;

- Asigra \ View Asigra Customers
- Asigra \ Search Asigra Backupsets
- Asigra \ Search Asigra Backupjobs

You can switch menu item layout between task-based and service-based orientation via the System Settings page > Menu Items > "Base item layout" option.

HOW DO I... FIND CURRENTLY-RUNNING BACKUPS?

You can use the saved search via the "Search Asigra Backupjobs" page > {unfold the search bar}> Load saved search > "Currently running".

These default saved searches provide a basic example of how to use MyClient's custom search features. Using MyClient's custom search features will enable you to find more troublesome backup jobs.

HOW DO I... FIND FAILED BACKUPJOBS?

You can use the saved search via the "Search Asigra Backupjobs" page > {unfold the search bar}> Load saved search > "Unsuccessful jobs from last 48 hours".

We intend to update MyClient to allow finding the most recent status for all backupjobs via the Search Asigra Backupsets page. This will simplify this procedure and allow efficiently finding more historical failed backupjobs.

HOW DO I... FIND BACKUPSETS THAT HAVE NOT RUN RECENTLY?

You can use the saved search via the "Search Asigra Backupsets" page > {unfold the search bar}> Load saved search > "Active accounts with no backups in 30 days".

Once the search has loaded, you are free to modify the conditions and criteria for the search, and save your changes as a new saved search option.

HOW DO I... VIEW PROTECTED AND BLM STORAGE INFORMATION FOR A BACKUPSET?

You can enable the columns on the "Search Asigra Backupjobs" page, by clicking the column-select icon in the top-right-hand corner of the data grid.

HOW DO I... VIEW LOG INFORMATION ABOUT A BACKUPJOB?

From the Customer Detail page, you can click on the Thermometer bar to load a backupjob report.

From the Search Asigra Backupjobs page, you can click the "Report" link to load a backupjob report.

In order to capitalise on technician familiarity with MyClient for Ahsay, the displayed backupjob report is (A) styled to match MyClient's display of Ahsay backupjob reports; and (B) contains combined log information from both the DS-System and DS-Client as it pertains to the backupjob in question.

HOW DO I... MOVE DS-CLIENTS BETWEEN MYCLIENT CUSTOMER PAGES?

You can use the Split/Merge feature on the right-hand side of a Customer Detail page. The Split/Merge feature allows you to make the following relationship changes to a MyClient Customer Record:

- Split one MyClient Customer Record into two
 - If a Customer Record erroneously contains multiple DS-Client services, you can use the Split feature to separate DS-Client services into a new MyClient Customer Record. You can use this feature repeatedly to split multiple DS-Client services out into individual customer records.
- Join two MyClient Customer Records into one
 - If a customer has multiple DS-Clients but the customer is billed conjointly, or if the customer should otherwise be represented as a single entity, you can use the Merge feature to merge two MyClient Customer Records into one. This assimilates the available services.

For more information about the Split/Merge feature, please contact MyClientGlobal.com Ltd or see the standard MyClient documentation.

Asigra Sales Group Sync

The Sales Group Sync feature checks the Asigra server to determine what Sales Group a customer belongs to, and then ensures that the customer is always assigned to the corresponding MyClient reseller office. The sync kicks in (A) as soon as a customer is seen for the first time; as well as (B) periodically, to repair any reseller changes that took place within MyClient.

INITIAL TESTING



To begin testing this feature on a small scale, find a small number of sales groups.

- On the Manage System Users page > {click corresponding reseller} > "Synchronise with Asigra Sales Group" option, use the 'add' button to assign the Sales Group to a MyClient reseller, then click the Save icon.
- All customers from that Sales Group should be reassigned to this MyClient reseller automatically in the background.
 - There will be few minutes' delay before the next background task begins. Alternatively, you could force a sync immediately via the Manage Servers page.

The customers will still appear on the View Asigra Customers page; the backupsets will still appear on the View Asigra Backupsets page, and so on. However, by default, these pages may (or may not) be filtered to restrict to view customers from your reseller only. If a reseller logs in to MyClient, they will certainly only be able to see records assigned to them.

IMPORT SALES GROUPS

The above process helps to validate the sync system on a small scale. But, if you have a large number of Sales Groups on your Asigra servers, it would be cumbersome to set up the links manually one by one. To alleviate this issue, MyClient has an "import" feature that will configure the rules in bulk.

The "import" feature can be accessed via the "import" button at the top of the Manage System Users page. Inline help text explains the feature in some more detail, but in summary, this "import" feature will look at each Sales Group on the Asigra server and take the following steps:

1. If a corresponding reseller exists in MyClient, continue to step 3
2. If no corresponding reseller exists in MyClient, then create a new reseller office that does correspond to it.
3. Set up a Sales Group Sync rule for this corresponding reseller.

To paraphrase the inline help text – a "corresponding reseller" for an Asigra Sales Group is hereby defined as a MyClient reseller office that meets at least one of the following criteria:

- A Sales Group Sync rule exists linking this MyClient reseller office to this Asigra Sales Group; OR
- The MyClient reseller office has the same name (case insensitive) as the Asigra Sales Group; OR
- The MyClient reseller office contains a MyClient login operator with the same email address as the Asigra Sales Group



§6. Troubleshooting

Infrequently Asked Questions

Overview

This page contains a range of assorted technical support questions and their responses, which may be useful for other MyClient licensees.

How do i ensure that no email notifications are sent by MyClient?

MyClient has a number of email reporting features, however all email reports are disabled by default. If you are interested in sending email reports, it's important to configure the branding of them first, to avoid confusing your customers and resellers.

The emails that MyClient sends to your staff and resellers can be configured from the Management menu > Manage System Users;

- Use the left-hand arrow to unfold operator selection
- Select an operator
- Ensure the "Daily watchlist", "Daily Event Log", "Daily All customers", "Daily ticket summary" options are disabled

The emails that MyClient sends to customers:

- Email reports to customers can be configured per-customer, by the Person tab of a customer's dialog.
- By default, all customers are set to "System Default" report frequency.
- The System Default frequency can be set via the Management menu > System Settings > Manage System Behaviour > Customer Notifications tab > "System Default value for 'Send daily backup reports to customer'" option
 - The System Default frequency is currently set to "Disabled" for all new MyClient installations.
 - As a result, no email reports will be sent to your customers, unless you override this setting for a customer or change the system default value.
- If you configure resellers within MyClient, you may also block groups of resellers from allowing email reports to customers.
- You may preview the email that would be received, by using the "reports: preview" link on the right-hand side of a customer detail page.

I used to be able to resync all servers from the System Maintenance page, what happened?

This feature is still available but was moved to improve consistency of the system.

You can refresh users by using the Manage Servers page:

- Click to highlight rows, or use "select > all on page" from the menu bar
- Click the "resync" button and select "Fast (users only)" The old system did not allow for syncing only a single server.

I used to be able to reassign customers to resellers from a single page, what happened?

This feature is still available but was moved to improve consistency of the system.

You can change the reseller for multiple customers by using the View Customers page:

- Perform a search, or browse to find the customers you want
 - If you are changing newly added customers, maybe enable the 'added' column and click the column header to sort by 'added'
- Click to highlight rows, or use "select > all on page" from the menu bar
- Click the "edit" button and change the reseller for all selected rows at once The old system was very cumbersome with a large number of customers.

I have a single reseller with three distinct groups of customers, how can i separate them?

There are several methods to resolve this issue. One solution is to keep a single reseller login and simply use the search features on the View Customers page to search for customers in a particular group.

To make this simpler, these searches can be saved for this reseller, and even added as menu items for this reseller only. This can be done as follows:

- Log in under the reseller's office (since searches are saved per-reseller office) using either an existing or new operator account
 - On the View Customers page, search WHERE server is {your choice of server}
 - Save the search with a descriptive name
 - Copy the URL (should be something like /crm.customer_list/?sid={1-4 digit number})
- Log out, and log back in under the primary office (necessary to modify the menu bar)
 - Open the Menu Items page (found via the Management menu > System Settings > Menu Items button)
 - Add a new menu item for the chosen reseller only

I deleted some backupsets, but it didn't free any quota. Why?

MyClient reports on the state of the AhsayOBS server. Deleting a backupset should immediately free usage for an account.

If the quota for an account does not match the total size of all backupsets, then you may consider

- forcing a quick refresh, by using the 'refresh' image button in the top-right corner of a Customer Detail page; or



- initiating a File Validation Check for this customer, via the link in the lower-right on a Customer Detail page.

How can i configure a Quota Pool for my reseller in MyClient?

We have a number of MyClient licensees who use a quota-pool model for their high-volume resellers - there are a few ways you can approach this in MyClient.

From their quota pool, the reseller themselves may or may not be selling a fixed storage limit to each customer. For example, say a reseller has a 1TB quota pool, and they have the freedom to split this into e.g. 2 x 500GB accounts or 4 x 250GB accounts or any combination thereof.

If the reseller themselves really are selling 2 x 500GB or 4 x 250GB fixed quota plans downlevel to their customers:

- The best solution is to actually apply these quotas to the individual customers.
- If you do not want to make this change and instead leave all account quotas at 1000GB, then you can use the Quota Threshold Alerts feature.
 - This allows you to set up alerts for the reseller when their 500GB-size customers reach 50% of 1000GB, and when their 250GB-size customers reach 25% of 1000GB.

But if the reseller themselves are not selling a fixed storage limit to each customer:

- You can set up a quota pool using the "Soft Quota" feature from the Manage System Users page
 - This can work either by allocated quota or by actual data storage, compressed or uncompressed.
 - The reseller can see their total usage on the home page; you can see the total usage for all resellers on the Manage System Users page.
 - You can prevent the reseller from creating new accounts if they are exceeding their soft quota limit. But otherwise, there's no harmful effect, backups will not be prevented. You must manually communicate with the reseller if they are exceeding their arranged soft quota limit.

MyClient shows different account names than in AhsayOBS! Why?

If you want the names to remain the same, then enable the option on the Manage System Behaviour page > Data Binding tab > "Customer metadata sync method" > "Two-way sync". Then, any changes in MyClient or in AhsayOBS will be updated in the other (maybe wait a few minutes for background sync).

The reason this is not done by default is because in MyClient Enterprise, you can have CRM records where the customer has zero or multiple backup services. In this situation it doesn't make sense to link the backup account's alias with the MyClient customer name.

Someone deleted a backupset! How do i find out who?

MyClient does log a lot of actions done in the portal. It should be possible to find added and removed backupsets. You can access this log via the Management menu > System Maintenance > "View System Notifications" page, and use the search bar to find entries where "Type" is backupset-deleted.

You can also browse the AhsayOBS User Log from within MyClient by using the "System Logs" link on the right-hand side of a Customer Detail page. If you find the backupset deletion in this way, you can compare the originating IP address to those given on the Manage Servers page to determine whether or not MyClient was responsible for mediating the action.

What does the "Billing Agent" field do?

The "Billing Agent" field is solely used for tagging in exports. It has no functional purpose within the system and is not visible to any resellers.

Some of our partners have distinct separation between the company providing technical support, and the company through which the customer's contract is held / from whom the customer receives an invoice. MyClient licensees can use the Billing Agent field to determine whether a customer should be billed directly, by their reseller, or by a third company.

If you are not using MyClient for billing purposes, then you can set this field however you like. If in doubt, we recommend leaving it set identically to the 'reseller' setting.

How do i configure third-level sub-resellers?

It's possible to nest resellers as much as you like. There are a few settings you should check when setting this up:

- Set the reseller for the sub-reseller
 - This is available on the Billing tab of a reseller's detail dialog
- The parent reseller should be placed into a Permission Group which lets them manage their own subresellers. One way of approaching this is to add the relevant permissions to a cloned permission group.
 - Identify the parent reseller's current permission group
 - On the Permission Groups page, create a new permission group by cloning the existing permission group
 - On the 'Overview' pane, give the permission group a better name
 - On the 'Staff and Resellers' pane, enable any relevant options
 - Return to the Manage System Users page and assign the parent reseller into this newly enhanced permission group

The parent reseller will then have the added ability to manage staff and resellers below them.

How do I brand the email reports for my resellers' customers?



You can easily customise the logo, return email address, header and footer used for a reseller's customers' daily email reports as well as for a reseller's watchlist/eventlog email reports.

You can customise these items on the Manage System Users page > {select reseller}> Branding pane (some items on this page you must select 'yes', then hit save for the additional input areas to appear). We then recommend using the "preview" link on the right-hand side of a reseller's customer's detail page in order to check your changes.



Troubleshooting alert emails

Overview

MyClient sends alert emails on a number of failure conditions.

Ping Monitor alerts

The ping monitor is a basic connectivity check between MyClient and your AhsayOBS server. There are any number of reasons that might cause the monitor to fail - it might be because your server is under high load, or it could equally likely be a transient, temporary network issue.

If you are seeing a high number of alerts, there is an issue communicating with your backup server.

If you are seeing some low background level of alerts, there is probably no issue communicating with your backup server, but some requests are still timing out or failing. As the monitor is executed from the same server performing background sync tasks, this may or may not have an impact on MyClient's operation.

- You can reduce the number of alerts by configuring MyClient to send the email only after two consecutive failures; this option is on the Manage System Behaviour page > Alerts tab
- If you do not wish to receive these alerts, you can disable the Ping Monitor from the Manage Servers page
- You can see a history of the ping monitor by using the "Latency Monitor" link from the Manage Servers page

API Monitor alerts, RDR Monitor alerts, API error notifications, and other alerts

If you receive an alert from one of these systems, please read the error message and follow any instructions that may be included.



Troubleshooting backup job statuses

Overview

There are a few cases that may cause the backup job status in MyClient to be displayed in an unexpected way. This article discusses some possible reasons for this.

Possible Causes

1. ENSURE MYCLIENT HAS MAINTAINED CONNECTIVITY TO YOUR BACKUP SERVER

MyClient must be able to communicate with your AhsayOBS backup server in order to retrieve backup job information. Please check server connectivity using the 'Test Connections' link on the Manage Servers page.

2. ENSURE MYCLIENT'S SYNC IS UP TO DATE

MyClient synchronizes different types of data at varying frequencies, so some data may not be as fresh as others. If MyClient's sync is totally up to date, then any incomplete backup job should appear in MyClient in the thermometer bar. Use the Refresh image button on the top-right corner of the Customer Detail page to ensure that all data is completely synchronized.

When synchronized, all backup reports should be identical when viewed from either MyClient or AhsayOBS. If it appears differently, please ensure you are comparing the exact same backup job.

3. AHSAYOBS CAN BE INCONSISTENT WHEN REPORTING BACKUP JOBS

Certain circumstances in either the backup agent or the AhsayOBS server can cause a backup job to be registered without an associated report. These jobs are not visible on the AhsayOBS Manage User > Report page, but may be visible on the AhsayOBS Manage Log > Backup Job page, as well as from within MyClient. Generally, MyClient will be a more reliable resource for identifying backup errors.

4. MYCLIENT "SMOOTHS OVER" ONE INCOMPLETE BACKUP

MyClient delays reporting on exactly one incomplete backup job, in order for customers' backup reports to be correct at the time of sending (otherwise, if for instance a customer has a backup schedule around the same time as MyClient's backup reports, they would always get a meaningless 'incomplete' backup report). However, as soon as a customer has multiple incomplete backup jobs, or if the backupset has not run in a certain number of days, then issues will be detected and reported on as normal.

5. ENSURE TIMEZONE SETTINGS ARE CORRECT

MyClient depends heavily on all timezone settings being correct. MyClient displays backup job times and reformats the time of missed backup notifications in line with the customer's own timezone relative to the backup server's timezone. If you are experiencing issues with missed backup notifications, please check that all timezone settings are correct.



Timezones

Overview

The AhsayOBS server stores and transmits backup job information using its local time zone. For MyClient to correctly apply timezone offsets, it is important that MyClient knows the local time on the AhsayOBS server.

Unfortunately it is not feasible to automatically retrieve this information from an unmodified AhsayOBS server. You must ensure that the AhsayOBS server keeps the correct time, and that the server's timezone is correctly set in MyClient on the Manage Servers page.

Check 1: AhsayOBS server local time

Log in to the AhsayOBS server and ensure that it displays the correct local time.

Check 2: Match timezone

MyClient uses Olson `tzdata` timezones throughout the system. Your timezone options consist of several hundred geographic regions - a necessity to support differing historical Daylight Savings rules.

It does not matter that the timezone on the AhsayOBS server is correct or not - only that it matches the setting in MyClient.

GETTING CURRENT OLSON TIMEZONE ON WINDOWS

Windows does not use the Olson timezone system and instead maintains its own list of timezones.

1. Find the current Windows timezone
 - o Control Panel > "Date and Time"
 - o Or run `systeminfo | findstr /C:"Time Zone"`
 - o Or run `tzutil /g` (requires Windows 7 / Server 2008 R2 or newer)
2. Look up the Windows timezone in <http://unicode.org/repos/cldr/trunk/common/supplemental/windowsZones.xml>

GETTING CURRENT OLSON TIMEZONE ON LINUX

Depending on your choice of Linux distribution, try running the follow commands to retrieve the current Olson timezone:

- `echo "$TZ"`
- `cat /etc/timezone`
- `grep ZONE /etc/sysconfig/clock`

Check 3: Identify AhsayOBS using non-system timezone

AhsayOBS may be using a non-system timezone. If the above fails to resolve the issue, please check the file `AhsayOBS/bin/startup.bat` or `AhsayOBS/bin/startup.sh` for any mention of `TZ` or `-Duser.timezone`.



Troubleshooting the Restore Applet

Overview

MyClient allows your staff, resellers, and customers to restore files directly from the MyClient web interface or the [Customer Portal »](#). The Restore Applet is loaded directly from your AhsayOBS server.

The web restore applet can sometimes fail to load because of problems with Java, SSL certificates, codesign certificates, or web browsers. These issues can affect both MyClient and the AhsayOBS web console.

Web-browser issues

MISSING OR DISABLED JAVA PLUGIN

The AhsayOBS restore applet requires the Java plugin to be installed and enabled in your web browser.

Recent versions of Firefox and other web browsers disable loading Java applets by default. You may need to pass a warning or click the restore-area again to allow the Java applet to load.

GREY SQUARE

If you see a grey square (with no error message popup otherwise), try restarting the web browser. This is a known issue with the AhsayOBS restore applet when certain web browsers have already hosted a Java process.

HTTPS certificate issues

"YOUR SECURITY SETTINGS HAVE BLOCKED AN APPLICATION SIGNED WITH AN EXPIRED OR NOT-YET-VALID CERTIFICATE FROM RUNNING"

Java 7u45 and later default to blocking Java applets that are loaded from an HTTPS site with an invalid SSL certificate. Check on the Manage Servers page, ensure that your server is either (A) connecting via unencrypted HTTP, or (B) connecting to a backup server with a valid SSL certificate.

AHSAYOBS DUMMY SSL CERTIFICATE PRIOR TO 6.15.0.0 HAS EXPIRED

All releases of AhsayOBS prior to 2013-06-10 included an SSL certificate that expired on the 2013-06-10. You can resolve this issue by upgrading to any AhsayOBS version released past this date, e.g. 6.15.0.0.

Applet and Codesigning issues

RESTORE APPLET PROVIDED PRIOR TO 6.17.0.2 USES AN EXPIRED CODESIGNING CERTIFICATE

The restore applet in 6.17.0.0 or older uses an expired codesigning certificate. You can resolve this issue by upgrading your AhsayOBS server to 6.17.0.2 or later.

RESTORE APPLET PROVIDED PRIOR TO 6.17.0.0 IS INCORRECTLY SIGNED (JAVA 7U51 OR LATER)

Java 7u51 and newer increased the default security settings for java applets that run in a web browser. As a result, the Web Restore applet bundled with AhsayOBS 6.15.0.2 and older does not load on a modern version of Java.

MyClientGlobal.com have documented workarounds for this issue in the article [Workaround for OBS 6 / Java 7 Web Restore Applet error »](#).

"FILE SIZE DOES NOT APPEAR TO BE CORRECT"

This is a known issue with AhsayOBS prior to 6.11.0.0. To resolve this issue, upgrade your AhsayOBS server.

Java workarounds

It is possible to resolve some of the above issues by modifying the Java plugin's security settings, or rolling back to an older version of the Java plugin. This is **not recommended** under any circumstance:

- It is not consistent to modify settings for one customer, and not feasible to modify Java settings for all customers.
- Modifying security settings may impact other Java-based software present on the customer's computer.
- The increased security defaults in recent versions of Java are present for valid and important reasons.
- Older versions of the Java plugin contain many known issues and vulnerabilities.



§7. Appendix - MyClient reference material

Permissions Matrix

Overview

MyClient offers a fine-grained permissions system to restrict access to certain features. This table gives a complete overview of the permissions required to use a certain feature.

- A user with "Super User" implies all lower permissions.
- A user with "Manager" permissions imply the base permission.
- Unless otherwise noted, when a feature is available to reseller offices, the reseller is restricted to using that feature with their own customers only.

WARNING: This page receives occasional revisions, but may be out-of-date with the latest changes to MyClient. Please bear this in mind when using this page as a reference.

Permissions Matrix

	Minimum Plan	Reseller	Permissions
Allow outgoing mail	Basic	Any	All
Configure installation settings	Basic	Primary	Technical Manager or Administrator
Customer Notes	Basic	Primary	All
Edit Customer Details	Basic	*	Technician or Billing or Sales or Administrator
Manage Customers	Basic	Any	All
Manage Servers	Basic	Primary	Technical Manager or Administrator
Monitor Backups	Basic	Any	Technician
Resolve orphaned accounts	Basic	Primary	Technician
Run Maintenance Tasks	Basic	Primary	Technician or Administrator
SSL interface	Basic	Any	All
Tags	Basic	Primary	All
View Customers	Basic	Any	All
View Email history	Basic	Primary	Technical Manager or Administrator
Watchlist: Ignore Customers	Basic	Primary	Technical Manager
Add backup customers	Basic	Installer	Technician
Backup Reports	Basic	*	All
Customise installation branding	Basic	Primary	Administrator
Import / Export customer details	Basic	Primary	Technical Manager
Manage system users	Basic	Primary	Administrator
Tickets	Basic	Any	All
Tickets: Unlink user or object	Basic	Primary	Administrator
Tickets: View all system tickets	Basic	Primary	Administrator
Backupset Editor	Standard	Any	Technician
Bulk update reseller associations	Standard	Primary	Technical Manager
Customise Monitoring Priorities	Standard	Primary	Technical Manager or Administrator
Generate Installation Summaries	Standard	Installer	Technician
Manage Custom Plans	Standard	Primary	Technical Manager or Administrator
Manage Servers: Unlimited OBS Servers	Standard	Primary	Technical Manager or Administrator
Manage resellers	Standard	Primary	Technical Manager or Administrator
Modify quota on server	Standard	*	Technician or Billing
Restore Backups	Standard	Any	Technician
Run Backup	Standard	Any	Technician
SMS Gateway support	Standard	Any	All
Server Health Monitor	Standard	Primary	Technical Manager or Administrator
Suspend user on server	Standard	*	Technician or Billing
Thermometers	Standard	Any	All



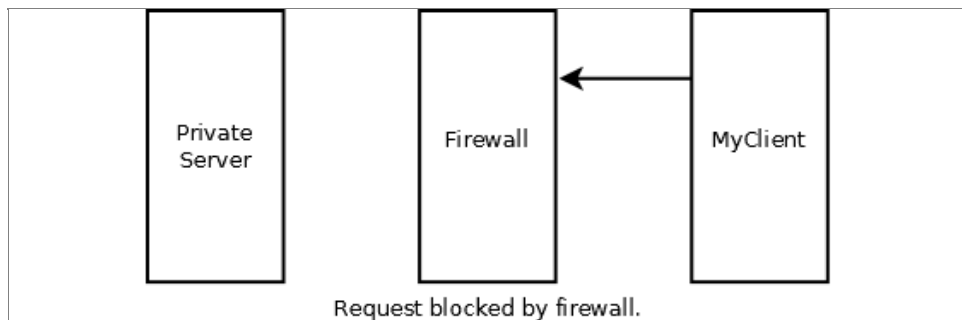
	Minimum Plan	Reseller	Permissions
Tickets: Monitor email account	Standard	Any	All
View Backupjobs in Progress	Standard	Primary	Technician
Automatic account unlocking	Premium	*	All
Automatic trial conversion	Premium	Any	All
Billing: Configure Settings	Premium	Primary	Billing Manager
Billing: Import / Export data	Premium	Primary	Billing Manager
CMS: Custom pages and menu items	Premium	Primary	Administrator
Create Custom Modules	Premium	Primary	Technical Manager or Administrator
Export to Outlook Calendar	Premium	Any	All
Google Maps Integration	Premium	Any	All
Lead Tracker	Premium	Primary	Sales
Lead Tracker: Import / Export	Premium	Primary	Sales Manager
Mailmerge	Premium	Primary	Billing Manager or Sales or Administrator
Mailmerge: Manage Templates	Premium	Primary	Sales Manager or Administrator
Manage Billing details	Premium	Primary	Billing or Sales
Restore server user profiles	Premium	Primary	Technical Manager or Administrator
Restrict access attempts	Premium	Primary	Technical Manager or Administrator
Send Bulk Email	Premium	Primary	Administrator
View Backup Schedules	Premium	Primary	Technician
Audit File Passwords	On Request	Primary	Technical Manager or Administrator
Data-block-based customer pricing	On Request	Any	All
MyClient API Service	On Request	Any	All
Manage AdGroups	Development	Any	Administrator
Send Bug Reports	Development	Primary	All
Web-based OBS login	Development	Any	All

* : Restriction is configurable via System Behaviour Settings.

Accessing private servers

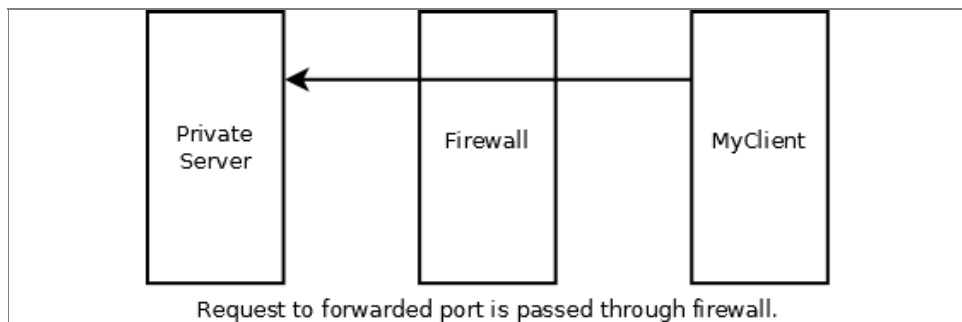
Overview

At some times, the best solution for a customer may be to install an AhsayOBS server on-premises. This can involve installing the server software on a computer that does not have direct internet connectivity and communicates via NAT from a private IP address only. MyClient must be able to make inbound requests to the server in order to sync data with it. There are several possible approaches for accessing an on-premises AhsayOBS server that is behind a NAT.



Method 1. Forward port

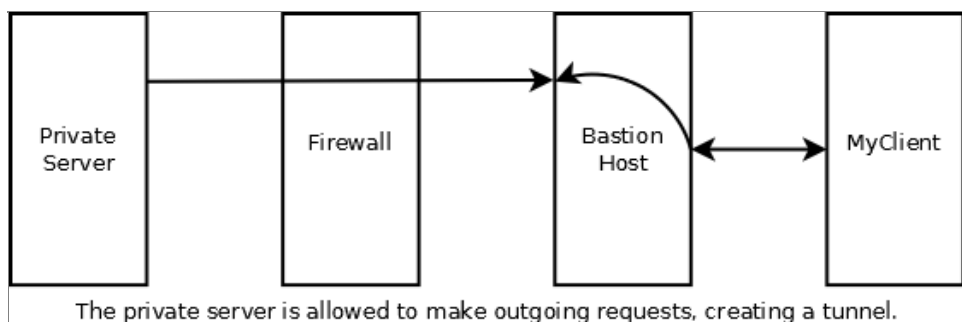
All NAT server solutions have the ability to make manual port mappings through the firewall. Please configure the NAT or firewall to forward the necessary ports for AhsayOBS through the firewall.



Although AhsayOBS normally listens on TCP ports 80 and 443, any port translations are possible at the NAT level by configuring the firewall software.

Method 2. Bastion host

If you are unable to forward ports through the customer's firewall, you can set up a bastion host. A bastion host works around the asymmetry of NAT to achieve full two-way connectivity.



The bastion host must have full external-facing internet connectivity. You can implement the bastion host as either part of your existing infrastructure; as a virtual machine on your own infrastructure; or as a virtual machine on any low-cost external VPS provider. It should be possible to get a reliable bastion host on a linux VPS from an external provider for 5 USD/mo or less.

There are many software solutions for implementing a bastion host, on both Windows and Linux:

- VPN software
 - OpenVPN
- Reverse proxy software
 - [ssh-D](#)
 - PortFusion, MyEnTunnel, Bitwise Tunnelier,
 - Firecat, Zebedee, revinetd, ReverseHttp, ...
- Third-party reverse proxy hosting services

- ngrok, localtunnel.me, pagekite, ...

MyClient Historic Q&A Archive

About this page

This page contains an archive of questions asked on the legacy Q&A platform. MyClientGlobal.com Ltd chose to retire this Q&A platform as part of the most recent website refresh, however the content remains useful and is preserved below.

Questions

WHAT LANGUAGES IS MYCLIENT AVAILABLE IN?

Danish, German, Spanish, French, Hebrew, Italian, Norwegian, Dutch, Portuguese. More information available here: <http://www.myclientglobal.com/translate/>

CAN I HOST MYCLIENT MYSELF?

MyClient is a cloud-based SaaS (software as a service) system - this means no worrying about maintenance or upgrades. We explain our rationale of why more in depth here: <http://www.myclientglobal.com/selfhosted/>

CAN WE HAVE OUR OWN CUSTOM DOMAIN?

As part of fully branding your MyClient Small Business or MyClient Enterprise installation, we encourage licensees to use a custom domain or subdomain, to complete the integration with your business. For more information please see: http://www.myclientglobal.com/custom_domains/

WHERE IS MYCLIENT HOSTED?

MyClient currently provides geolocated hosting in your choice of Los Angeles, USA, or London, UK. We can provide custom geolocated nodes upon request. The servers are maintained and backed up in New Zealand.

WHAT LANGUAGES IS MYCLIENT AVAILABLE IN?

MyClient is available in Danish, German, Spanish, French, Hebrew, Italian, Norwegian, Dutch, Portuguese. For more information about translations please see here: <http://www.myclientglobal.com/translate/>

WHERE CAN I CHANGE THE EMAIL ADDRESS FOR TICKETS?

Ticket notifications can be configured for each individual reseller staff member. A staff member can change their own email subscriptions on the Account page; or you may change settings for other resellers and staff members from the Manage System Users page.

The "Daily ticket summary" option sends the staff member a table summary of all their open tickets once each day.

The "Instant ticket updates" option sends the staff member an alert email each time (a) they are added to a ticket, or (b) one of their tickets is updated.

HOW CAN I GET EMAILED WHEN AN RESELLER CREATES A TICKET?

The ticket system in MyClient can be used for any type of multiparty communication: reseller-customer, reseller-parent, primary-customer, reseller-internal, primary-internal or any other relation.

When a reseller creates a ticket in MyClient, they are presented with the option to escalate the ticket for support. You can choose whether resellers escalate tickets to (a) nobody, (b) their parent reseller, or (c) the primary office, from the Manage System Behaviour page > Tickets pane > "Suggest that resellers escalate tickets to" option.

If a reseller escalates a ticket to your reseller office, all members of your office will become attached to the ticket. If "Instant Ticket Notifications" are enabled for your operator account, you will receive an email notification when this happens.

This can be bypassed for selected operators by disabling the "Include in company-wide tickets" option from their operator dialog on the Manage System Users page.

WHERE CAN I CHANGE THE LANGUAGE FOR THE WELCOME EMAIL FROM THE OBS?

The welcome email from the backup server uses the language of the new customer.

You can set the language for new customers by the Management menu > New Account Plans button > {select a plan template} > 'New Account Options' pane > "Language" setting.

WHERE CAN I CHANGE THE WELCOME EMAIL TEXT SENT FROM MYCLIENT?

You can set the email subject for this message by the Management menu > System Branding > 'Global' pane > "Welcome Email Subject" option.

You can set the main text of the welcome email by the Management menu > Text Templates > "New Customer Welcome email (if not set for reseller)". You can also override this welcome text for any reseller, from the Manage System Users page.

STORAGE NOT UPDATING AFTER DELETING BACKUPSETS

MyClient reports on the state of the AhsayOBS server. Deleting a backupset should immediately free usage for an account. If the quota for an account does not match the total size of all backupsets, then you may consider



1. forcing a quick refresh, by using the 'refresh' image button in the top-right corner of a Customer Detail page; or,
2. initiating a File Validation Check for this customer, via the link in the lower-right on a Customer Detail page.

HOW CAN I GROUP AHSAY ACCOUNTS INTO A SINGLE CUSTOMER IN MYCLIENT?

MyClient does not allow you to merge multiple AhsayOBM/ACB accounts into one. We could build such a feature, but it would be cosmetic only and not change the truth that the accounts are separate: it would be technically misleading, and make it harder to troubleshoot backup failures.<

However, there are some workarounds:

- You could maybe do this on the OBS server by modifying profile.xml files and updating client's software configuration.
 - This has the advantage of merging other properties of the account (e.g. quota, email report recipients, ...)
- Additional backupsets are the preferred method for supporting multiple computers or sites for a single customer. You may of course use the "Run scheduled backup on this computer" option in the OBM/ACB client to configure which backupsets run on which computers.
- Or you can create a limited-permission reseller in MyClient, and assign the customers to the reseller.
 - This gives the customer a single place to log in and check their multiple accounts.
- Or if you want, we can enable a feature for your MyClient installation to allow multiple AhsayOBM/ACB backup accounts under a single MyClient customer record.
 - This centralises CRM details for the customer, but there are still obviously two backup accounts.

CUSTOMER BACKUP REPORTS SHOW HOW LONG THE BACKUP TOOK

There are two main formats for daily email reports:

- The "Modern single-customer" used for customer email reports includes number of files, and is a little softer with bad news.
 - To ensure any changes to this template do not cause additional clutter, we might remove "Updated Permissions" and replace it with "Duration".
- The "Modern multi-customer" used for staff/reseller watchlist and event-log emails displays the number of erroring backup jobs and how long it has been since last failure.

HOW CAN I SEND EMAILS FROM MY OBS ONLY AND NOT MYCLIENT AS WELL?

MyClient has a number of email reporting features, however all email reports are disabled by default. If you are interested in sending email reports, it's important to configure the branding of them first, to avoid confusing your customers and resellers.

The emails that MyClient sends to your staff and resellers can be configured from the Management menu > Manage System Users;

- Use the left-hand arrow to unfold operator selection
- Select an operator
- Ensure the "Daily watchlist", "Daily Event Log", "Daily All customers", "Daily ticket summary" options are disabled

The emails that MyClient sends to customers:

- Email reports to customers can be configured per-customer, by the Person tab of a customer's dialog.
- By default, all customers are set to "System Default" report frequency.
 - The System Default frequency can be set via the Management menu > System Settings > Manage System Behaviour > Customer Notifications tab > "System Default value for 'Send daily backup reports to customer'" option
 - The System Default frequency is currently set to "Disabled" for all new MyClient installations.
 - As a result, no email reports will be sent to your customers, unless you override this setting for a customer or change the system default value.
- If you configure resellers within MyClient, you may also block groups of resellers from allowing email reports to customers.
- You may preview the email that would be received, by using the "reports: preview" link on the right-hand side of a customer detail page.

HOW CAN I CHANGE THE RESELLER FOR MULTIPLE CUSTOMERS AT ONCE?

You can change the reseller for multiple customers by using the View Customers page:

- Perform a search, or browse to find the customers you want
 - If you are changing newly added customers, maybe enable the 'added' column and click the column header to sort by 'added'
- Click to highlight rows, or use "select > all on page" from the menu bar
- Click the "edit" button and change the reseller for all selected rows at once

HOW CAN I REFRESH ALL USERS ON A SPECIFIC SERVER?

You can refresh users by using the Manage Servers page:

- Click to highlight rows, or use "select > all on page" from the menu bar



- Click the "resync" button and select "Fast (users only)"

IS THERE ANY WAY THAT AN OPERATOR CAN BE IN MULTIPLE OFFICES USING THE SAME EMAIL ADDRESS?

MyClient uses email addresses as a unique identifier for an operator. An email address must be attached to only one operator, and an operator can only be part of one office.

HOW CAN I CUSTOMIZE EMAIL REPORTS FOR MY RESELLER?

The daily report emails are built by combining a number of templates. You should be able to customise at least the header image, header text, and footer text by using the Manage System Users page > {select reseller}> Email Branding tab.

Text templates will inherit from the parent office if not set –so be careful when changing text for a reseller that has sub-resellers! If text templates are not set all the way up the reseller hierarchy, there are systemwide fallbacks on the Manage Text Templates page).

You can preview the report by visiting any one of the reseller's customers, and using the "Report: preview" link on the right-hand side of the page.

MYCLIENT IS SHOWING DIFFERENT AHSAY USERNAMES THAN WHATS DISPLAYED ON THE OBS?

If you want the names to remain the same, then turn on this option:

Manage System Behaviour page > Data Binding tab > "Customer metadata sync method" > "Two-way sync"

Then, any changes in MyClient or in AhsayOBS will be updated in the other (maybe wait a few minutes for background sync).

The reason this is not done by default is because in MyClient Enterprise, you can have CRM records where the customer has zero or multiple backup services. In this situation it doesn't make sense to link the backup account's alias with the MyClient customer name.

HOW CAN I BULK EMAIL ALL CUSTOMERS THAT HAVE HAD CONSECUTIVE MISSED BACKUPS?

The bulkmail system in MyClient allows you to select customers in the top area. If you perform your desired search on the Search Backupsets page, and then use the "Select: entire page" link, then the "bulkmail" link, the affected customers will be pre-filled into the bulkmail system.

This means you can apply your search and then directly email the affected customers.

IS THERE A LOG OF ACTIONS THAT HAVE HAPPENED IN MYCLIENT?

You can access this log via the Management menu > System Maintenance > "View System Notifications" page

WHAT IS THE BILLING AGENT FIELD ?

The "Billing Agent" field is solely used for tagging in exports. It has no functional purpose within the system and is not visible to any resellers.

Some of our partners have distinct separation between the company providing technical support, and the company through which the customer's contract is held / from whom the customer receives an invoice. MyClient licensees can use the Billing Agent field to determine whether a customer should be billed directly, by their reseller, or by a third company.

If you are not using MyClient for billing purposes, then you can set this field however you like. If in doubt, we recommend leaving it set identically to the 'reseller' setting.

CAN I NEST RESELLERS?

Yes, however there are a few settings you should check when setting this up:

- A reseller has both "Parent Office" on the reseller tab, and "Reseller"/"Billing Agent" on the Billing tab.
 - These are distinct for historical reasons –we're working on bringing them together into one setting. For now, please make sure they are all set identically.
 - Reseller1A should have parent Reseller1
- The reseller Reseller1 should be placed into a Permission Group which lets them manage their subresellers.
 - If you want to give Reseller1 the ability to manage their subresellers, it would be best to clone this permission group into a new one:
 - Management menu > System Settings > Permission Groups
 - Click 'Create new' and choose to clone the 'Subreseller' permission
 - On the Overview pane: give it a better name ("SubresellerNAME Allowed To Create New Accounts"?)
 - On the Staff and Resellers pane: enable any relevant options
 - You can then use the Manage System Users page to assign reseller1 into this newly enhanced permission group. They will then have the added ability to manage staff and resellers beneath them.

HOW DOES MYCLIENT SERVER SELECTION WORK?

The server selection in MyClient is a little complex. MyClient allows you to customise the server options for both the reseller and in the New Account Plan



template. This allows you to easily change servers for individual resellers, but it does mean that there are some nuances to the interaction. We will aim to simplify this system in the future.

When creating a new backup account: MyClient first builds a list of available servers from the New Account Plan system, and then filters this list down by the servers available to the reseller.

Then the server is chosen from this list using the New Account Plan 'default server' option.

There are some edge cases where the above is not possible, MyClient attempts to do the right thing:

- If the list contains some servers but does not contain the New Account Plan 'default server', then a random selection from the list is made.
- If the list is empty, then the New Account Plan 'default server' is used regardless of the reseller's available servers;
- If the list is empty and the 'default server' was an automatic rule (e.g. Lowest Total Quota) then it is applied over all known servers.

HOW CAN I SUSPEND ALL CUSTOMERS OF A RESELLER?

You can suspend all customers of a reseller:

- On the View Customers page, search WHERE Reseller is {your chosen reseller}
- Ensure that a large enough number of rows are visible to see all accounts
- From the top bar, choose 'Select > all on page', then click 'edit'
- Set 'account state' to 'Suspended'
- Enter your password to authorise the action

HOW CAN I STOP A RESELLER FROM LOGGING INTO MYCLIENT?

You can prevent a reseller from logging in to the portal:

- From the Manage System Users page, unfold the reseller and select a reseller operator
- On the right-hand side, set 'Enabled' to 'no'

HOW DO I FIND OUT WHEN AN ACCOUNT WAS DELETED?

You may be able to find more information about the issue by searching the installation history (Management menu > System Maintenance > System Notifications link near the bottom).

MyClient normally logs whenever backupsets and backup accounts are removed, whether they are removed from within MyClient or from the backup server itself. For instance, you could search "Where message contains {account username}", or "Where type is {backup account removed in MyClient} or type is {backup account removed on backup server}".

WHAT FQDN'S AND IP'S SHOULD WE BE PUTTING IN OUR SPF RECORDS SO MAIL DOESN'T GET TAGGED AS SPAM/BLACKLISTED?

You can use the IP4 and IP6 SPF mechanisms, using the IP addresses present on the Manage Servers page within your installation. MyClient currently sends email using these same IP addresses.

Most MyClient installations are on our shared infrastructure and as a result we cannot set the fcrDNS PTR records to allow domain-based SPF entries. Please also bear in mind that if you do not have a dedicated server with us, then the IP address used by your MyClient installation may or may not be shared with other MyClient licensees.

An alternative approach worth considering would be to configure an SMTP server in MyClient and then perform additional filtering at your SMTP server, allowing you to mask the message source for any final delivery and allowing you to use the MX or PTR SPF mechanisms to whitelist your own mail server only.

HOW CAN I TURN OFF ADMINISTRATIVE ALERT EMAILS?

You can disable these emails from the System Behaviour page > Alerts tab > "Email Administrative Alert on sync errors" option.

I SETUP A NEW CLIENT TODAY USING THE OBS TRIAL DOWNLOAD; HOW DOES THAT NEW USER ACCESS MYCLIENT?

MyClient automatically syncs with your AhsayOBS servers in the background, and will automatically detect new users within a few minutes. This applies for any new users that are created – regardless of whether you create them directly on the AhsayOBS Web Console, via the AhsayOBS API, or via Trial Registration. Then your staff and resellers will be able to manage the newly created customer from within the portal.

If you have the Customer Portal set up, the customer will be able to log in to the Customer Portal to view report history, storage information, submit support requests and browse and restore files. For more information about the Customer Portal, please see http://www.myclientglobal.com/customer_portal/.

WHAT DO THE THERMOMETER COLOURS REPRESENT?

The quota-usage bar is coloured based on how much space is left on the account. You can also see this on the View Customers page.

It changes from green (lots of quota remaining) through yellow to red (very little quota remaining) – the administrator can change the exact percentage cutoffs on the Manage System Behaviour page.



The thermometer underneath each backupset is coloured in segments, based on the status of the most recent backup jobs. You can click on each segment to view the backup job report.

The colour for each segment might be green (successful backup job), light green (success with no changes), orange (success + warning), red (error), white (missed), dark grey (currently running), or another colour.

HOW DOES MYCLIENT QUEUE MAIL?

When MyClient sends an email – such as a consolidated daily backup report to a customer, or a watchlist or event log summary to your staff and resellers – the mail gets placed into the Mail Queue, and then the mail is sent in the background by another process. This has the advantage of allowing you to disable all outgoing mail until you are satisfied with the branding or content of any outgoing email. By default, mail queue processing is disabled, as you may not have configured the branding for e.g. email footers.

WHAT DOES RE-SYNC MEAN?

MyClient automatically syncs in the background with your AhsayOBS servers. Data is synced at different intervals based on how likely it is to have changed. This approach significantly improves MyClient's performance compared to always working with live data, and is still suitable for all usages outside extreme circumstances. If you are working with a customer and need interactive troubleshooting (e.g. you initiate a backup for the customer and need the report to appear immediately), you can force an immediate resync (a) for an individual customer by using the Refresh image button on the top-right-hand corner of a Customer Detail page; or (b) for the entire system by using the links on the System Maintenance page.

CAN MYCLIENT ESTIMATE HEAPSIZE?

Our understanding is that the heap size should be set based on how much physical memory is available in the server. In general for a dedicated server, the server should use as much physical memory as is available and no more – so one would normally assume about 80% of the server's total memory should be dedicated to the OBS server process, with the remainder for operating system use (e.g. thread stacks). If you have a way of estimating the best heap size for the OBS server process based on client backups per day, we'd love to hear it (It's interesting to note that larger heap sizes can actually decrease performance owing to extended GC times. It has at least a noticeable effect on restore speeds in the client software, and there's a "sweet spot" that seems to depend on a number of factors).

In the AhsayOBS Administrator's Guide, it is recommended to allocate the OBS service at least 2048MB and no more than 50% of physical memory. This is roughly in line with the above. The default installation of 6.17.0.0 on Windows sets -Xms512m -Xmx1024m – perhaps Ahsay should set the heap size based on physical memory automatically when starting the service or installing the product.

Increasing the maxThreads setting is once again hardware-dependent and best set based on a variety of factors, including aggregate network usage. It's not clear what the limit should be, although a too-high limit may cause the server to go into swap – if you have 1,000 customers all trying to back up at the default 9pm, it's better to refuse half the connections and have the client retry later, rather than attempt to process them all at once. In the AhsayOBS Administrator's Guide, no mention is made of the maxThreads setting, but all the examples have it set to 1000 (increased from the default 500). We have observed that increasing maxThreads to 1000 or even 1500 or 2000 is a very common practice amongst larger Ahsay licensees.

WHAT IS THE PING MONITOR IN MYCLIENT?

The ping monitor is a basic connectivity check between MyClient and your AhsayOBS server. There are any number of reasons that might cause the monitor to fail - it might be because your server is under high load, or it could equally likely be a transient, temporary network issue.

If you are seeing a high number of alerts, there is an issue communicating with your backup server.

If you are seeing some low background level of alerts, there is probably no issue communicating with your backup server, but some requests are timing out or failing. This may or may not have an impact on MyClient's sync processes.

- You can reduce the number of alerts by configuring MyClient to send the email only after two consecutive failures; this option is on the Manage System Behaviour page > Alerts tab
- If you do not wish to receive these alerts, you can disable the Ping Monitor from the Manage Servers page
- You can see a history of the ping monitor by using the 'Latency Monitor' link from the Manage Servers page

WHY DOES IE8 NOT DISPLAY THE SIGN UP FORM PROPERLY?

The issue is with the HTML code snippet used to embed the form into your website.

This issue is caused because IE8 does not respect the min-width attribute unless the target website declares a modern DOCTYPE.

To resolve the issue, either

- add <!DOCTYPE html> to the very top of the HTML page (might have other consequences), or
- add width:800px; alongside the other style parameters in the MyClient iframe HTML.

To better support IE 8 in non-strict doctype mode, we will include the above information into an update for this code snippet in our documentation.

IS THERE A MINIMUM AHSAY CLIENT VERSION REQUIRED TO WORK WITH MYCLIENT?

Any 5.x version should be fine, there's no minimum version – MyClient was initially developed during the 5.x days and we still have a large fraction of customers using these older versions. Although some features are missing on 5.x servers (e.g. run backup now), MyClient becomes more powerful in other ways since MyClient adds reseller support, which is otherwise only available in a weaker form on 6.x servers.



DOES CREATING A MYCLIENT RESELLER CREATE A AHSAYOBS SUBADMIN?

Creating a MyClient reseller does not create an AhsayOBS subadmin. The MyClient reseller system is separate to the AhsayOBS subadmin system, predating it and allowing for much greater flexibility and features.

It's perhaps a little confusing at first – please see http://www.myclientglobal.com/understanding_resellers/ for more information.

CAN I HAVE A SECOND USER USING MYCLIENT WHICH COULD SEE ONLY A SOME OF OUR OBS USERS ACCOUNTS?

It is possible by creating a MyClient reseller and assigning the customers inside MyClient. The MyClient reseller system works independent of OBS subadmins, so you do not need to migrate any OBS users. You can create any number of MyClient login operators under a MyClient reseller.

CAN WE DIRECT CUSTOMERS FROM OUR HOME PAGE DIRECTLY TO MYCLIENT TO CREATE NEW BACKUP USER ACCOUNTS FOR AHSAY?

Yes you can - you can add iframe html to a page on your own website to provide a way for customers to sign up directly. The signup form mirrors the signup process within MyClient, so it respects all your custom plan offerings and configuration.

In MyClient, from the Management menu, choose System Settings > "Configure access to external forms and API methods" and create a new access key for your primary reseller for the "External Forms \ Signup Form" option.

Once you have created an access key, you may embed the signup form into your own website using the following HTML:

```
<iframe src="https://YOUR-MYCLIENT-INSTALLATION/ext.signup_customer/?apikey=access_key" style="min-width:800px;border:0;margin:0;padding:0;" allowTransparency="true"></iframe>
```

For more information, please see the documentation on http://www.myclientglobal.com/embedding_myclient/ and http://www.myclientglobal.com/external_forms_and_api/.

A TOOL THAT SIMPLIFIED REMOTE SEED LOADS

This would be a great utility , maybe with a upload progress bar !!!

A TOOL THAT AUTOMATICALLY SCANNED A COMPUTER TO DETERMINE APPROXIMATE DATA USAGE PRIOR TO INSTALLATION

WOULD YOU BE INTERESTED IN A STAND-ALONE VERSION OF MYCLIENT TO RUN ON YOUR OWN SERVERS

WOULD YOU BE INTERESTED IN A TOOL THAT AUTOMATICALLY MOVES ACCOUNTS TO BALANCE STORAGE BETWEEN MULTIPLE BACKUP SERVERS?

WOULD YOU BE INTERESTED IN AUTOMATICALLY CREATE ADGROUPS AND ASSIGN THEM TO CUSTOMERS ACROSS ALL YOUR OBS SERVERS

AUTOMATICALLY CREATING AND BRANDING SOFTWARE AGENTS FOR ALL YOUR RESELLERS INSTANTLY, THAT ARE ALWAYS UP-TO-DATE

SUPPORT FOR CREATING INVOICES IN MYCLIENT

SUPPORT FOR PROMPTING FOR PAYMENT DETAILS DURING ACCOUNT SIGNUP IN MYCLIENT

COMMAND-LINE TOOL THAT CAN.... (CLICK FOR TOOL DETAILS)

Retrieve and manage OBS settings, fix common scheduler errors, transmit logs offsite, modify backup account settings and backup server hostname?

SALES FORCE INTEGRATION

CAN I SEND BACKUP REPORTS TO ONE EMAIL ADDRESS AND ALERTS TO DIFFERENT ONE?

1. Set the customer to daily-on-failure only with the one email address, and then let's create a custom report for the every-day email address
2. Then create a custom report: to create custom report: [[on the search-backupsets page, search WHERE customer is {the customer}; you should see all their backupsets ; then save the search with a good name like "{customer's name here}" then from the Management menu > Manage Event Handlers create a new rule Every Day (at time: 7.00 am) --> Send Custom Backup Report (backupsets: your saved search; template: modern single-customer; recipient: their email address)

HOW CAN I SET THE USER HOME FOR NEW ACCOUNTS ON A SERVER?

It is possible to set the User Home directory for new accounts per- plan template (System Settings > New Account Plans > {select plan} > "Backup Server" tab). You can create new account plan templates for your reseller, and then assign the plan templates to the reseller by the Permission-Group system.

If the User Home is not set for your new account plan template, then the per-server default can be set on the Manage Servers page - and if the User Home is not set there either, then it falls back to the AhsayOBS server itself to choose the User Home directory.

WE HAVE A AHSAY PROXY RE-DIRECTOR, CAN RESELLERS CREATE NEW ACCOUNTS ON THEIR OBS INSTEAD OF OURS?

The answer is absolutely yes – one of MyClient's main uses is as a reseller portal covering multiple AhsayOBS servers. Resellers can view and manage their customers and create new customers unified across many AhsayOBS servers, without requiring any direct access to AhsayOBS.

We have a number of other features for your resellers, such as consolidated email reports; a comprehensive permission system; centralised backup job troubleshooting and management; sign-up forms that can be directly embedded into the reseller's website; the ability for a reseller to sign up a customer, but have the customer enter their own password securely and privately; and many more.



CAN YOU EXPLAIN THE MYCLIENT REFRESH INTERVALS

MyClient automatically refreshes in the background. However, different data is synced at different time intervals based on how likely it is to have changed. Most data should be up-to-date within 15 minutes. This includes new and deleted backup accounts, all backup jobs, and new backupsets.

Backupset deletions are a rarer occurrence and owing to the design of AhsayOBS, require a much greater load on the AhsayOBS server to verify. As a result, MyClient checks for backupset deletions at a much lower frequency. If the backupset was deleted from within MyClient, it is obviously aware of the change immediately.

If you are working with a time-sensitive issue, you can of course refresh all customers immediately from the Manage Servers page, or a single customer by pressing the 'refresh' image button in the top-right corner of a Customer Detail page. This allows you to perform interactive troubleshooting from MyClient.

In this case as you have a dedicated server with us, we can increase the frequency of backupset-deleted checks to help avoid this happening again.

We do suggest having your resellers work from within MyClient instead of logging in directly to the AhsayOBS server – this allows MyClient to be aware of changes immediately rather than waiting until the next refresh.



§8. Appendix - AhsayOBS reference material

AhsayOBS SSL certificates with multiple SubAdmins

Overview

A custom SSL certificate on AhsayOBS may cause issues if you use AhsayOBS SubAdmins. As SSL encryption starts before the desired hostname is indicated by the client, the SSL certificate must match without knowing the hostname.

Possible Solutions

There are a few solutions to this problem.

- You may configure the `AhsayOBS/conf/server.xml` file to listen to multiple IP addresses. This means you can apply a different SSL certificate on each IP address.
 - This is the approach used by MyClient to support custom domains. For more information, please see [Custom Domains »](#).
- You may purchase an SSL certificate that crosses multiple domain names via SAN (Subject Alternative Name).
- You can use the default not-secure-company SSL certificate.

- This solution is feasible if you must use AhsayOBS SubAdmins and only have a single IP address. The not-secure-company certificate is whitelisted by the OBM/ACB backup agent despite being for a mismatched hostname.

The insecurity of the default not-secure-company SSL certificate arises solely from the fact that anyone can easily acquire a trial version of AhsayOBS and correspondingly, the private key for this SSL certificate, allowing them to decrypt traffic on the wire. This immediately bypasses any security benefit of using an SSL connection.

This means the security of SSL is a pretext only; you could therefore reduce CPU load on the backup server by switching clients to unencrypted HTTP instead of SSL.

- A much better solution is to avoid using AhsayOBS SubAdmins and instead use MyClient Resellers.



Extracting AhsayOBS Wildcard SSL certificate

Overview

If your AhsayOBS server uses a wildcard SSL certificate (e.g. *.yourdomain.com) and you are interested in using a custom domain for your MyClient installation, the following instructions may help in retrieving your wildcard certificate from the AhsayOBS Java Keystore.

Support method

Attach the AhsayOBS keystore file to a support ticket, and we can extract the certificate for you.

Portecle GUI method

To extract the private key from your AhsayOBS keystore file, we recommend using the free software [Portecle](#). This software is cross-platform java.

1. Launch the applet from the website and browse to your AhsayOBS keystore file.
2. Right-click the 'tomcat' certificate and choose 'export', selecting "Private Key and Certificates" in PEM format. The resulting file contains the private key. If you choose to encrypt the resulting output file, please supply us with the password along with the generated output file.

OpenSSL / keytool method

If you would rather use command-line utilities, or if your Linux AhsayOBS server does not use a GUI, you may extract the private key and certificates using keytool (bundled with java) and OpenSSL:

```
/path/to/java/jre6/bin/keytool -importkeystore -srckeystore /path/to/AhsayOBS/conf/keystore -destkeystore ~
```

Enter a password (e.g. "changeit") for the produced temporary .p12 file, and supply the encryption key for the keystore (default "changeit"). This may produce a series of errors about keytool being unable to export CA certificates - this is fine, however ensure that the line "Entry for alias tomcat successfully imported" appears.

If you can supply us with the produced .p12 file, we can then proceed with installation of the SSL certificate. Otherwise you can extract the private key and certificates in ordinary human-readable PEM format with OpenSSL:

```
openssl pkcs12 -in ~/output.p12 -out ~/output.pem -nodes
```

As the .p12 file contains both parts of the matching pair, you could add -nocerts to the OpenSSL command to output only the private key, or add -nokeys to output only the certificate and chain.

See Also

[Importing AhsayOBS SSL certificate »](#)



Implementing AhsayRDR

Overview

For Ahsay licensees with multiple OBS servers, customer growth means that occasionally customers must be migrated between OBS servers. If AhsayRDR is not in use, this necessitates modifying the customer's backup client configuration. This constrains the Ahsay licensee from migrating customers at will.

AhsayRDR provides a redirection service; all AhsayOBM/AhsayACB clients connect first to the AhsayRDR server, which then redirects the client directly to the relevant backup server.

Implementing AhsayRDR

AVOIDING MAKING ANY CHANGES TO CLIENT CONFIGURATION

If your clients connect via hostname to the AhsayOBS server, the simplest approach to implement AhsayRDR is to point all hostnames to the AhsayRDR server, and change the AhsayOBS servers to use new hostnames. If you are using AhsayOBS Subadmins, then this also necessitates also modifying the DNS records for all Subadmin hostnames.

Normally, recent versions of AhsayOBS do not allow direct client connections unless the hostname is known to the server. As a result, implementing the above will cause backup connections to fail. However, this can be resolved by simply creating a blank subadmin attached to the original URL. This causes AhsayOBS to allow the client backup connection, despite the hostname not matching.

If your clients connect via IP address to the AhsayOBS server, the simplest approach to implement AhsayRDR is to move AhsayOBS to a different port, and redirect the standard port 80/443 to your AhsayRDR server, using either your firewall, AhsayPRD, or an nginx proxy_pass rule.

AUTOMATICALLY MAKING CHANGES TO CLIENT CONFIGURATION

It may be possible to remotely deploy and run MyClient SetHost to automatically change the configured backup server for all relevant accounts. If you have an existing remote administration tool in place, this would be suitable; otherwise, commands can be run in bulk via careful application of pre/post-commands or AUA scripts.

For more information about this option, please see [MyClient SetHost »](#).

Alternatives to AhsayRDR

AHSAYPRD

AhsayPRD is a free alternative to AhsayRDR that instead of redirecting the client, tunnels all communication through to the backup server. This configuration can be useful if you only want to maintain one public-facing server, while still maintaining the ability to migrate customers at will.

By coupling AhsayPRD with the IP-based workaround above, it is possible to maintain existing hostname configurations.

DNS-LEVEL REDIRECTION

It's possible to use DNS-level redirection by automatically creating a subdomain for each individual AhsayOBM/ACB customer. By hosting your own DNS server or by integrating with your DNS provider's API, this can be a simple solution that allows easy migration with distributed points of failure.

However, implementing this would be difficult for licensees with existing AhsayOBM/ACB customers.

CUSTOM SOLUTION

If you have certain specific problems with the AhsayRDR software, please contact support to discuss additional alternative options.



Importing AhsayOBS SSL certificate

Overview

You may configure a custom SSL certificate for AhsayOBS. If you have customers or resellers that directly access the AhsayOBS server, this may improve the impression of a fully branded service.

If you are using AhsayOBS SubAdmins, there are some caveats to SSL support that you should be aware of. See [AhsayOBS SSL certificates with multiple SubAdmins »](#) for more information.

Support method

Attach the certificate and matching private key to a support ticket, and we can produce a keystore file for you.

OpenSSL + Portecle method

We recommend using the free software [Portecle](#) to understand the structure of the java keystore (JKS) file. This keystore file is used as the trust root for tomcat; it contains entries for all trusted root certificates, as well as one entry "tomcat" that (a) uses the same password as the keystore password; and (b) contains the desired certificate, private key, and all intermediate certificates together.

1. Inspect the private key to see if it is encrypted. If so, decrypt it:
 - `openssl rsa -in encrypted.key -out private.key`
 - OpenSSL will prompt for a password to decrypt the key.
2. Ensure that the private key and certificate match by comparing the output of the following commands:
 - `openssl rsa -noout -modulus -in private.key`
 - `openssl x509 -noout -modulus -in certificate.crt`
3. Combine the certificate, private key, and all intermediate certificates into a PKCS12 file:
 - `openssl pkcs12 -export -out combined.pl2 -inkey private.key -in certificate.crt -certfile intermediate.crt`
4. Use "Import Key Pair" in Portecle to import the combined PKCS12 file into a fresh copy of the default AhsayOBS supplied keystore file, using the name "tomcat", the same password as the keystore password (default "changeit"), and replacing the existing "tomcat" pair.

See Also

- [AhsayOBS SSL certificates with multiple SubAdmins »](#)
- [Extract AhsayOBS Wildcard SSL certificate »](#)

Workaround for AhsayOBS 6.x - 6.9.x.x vulnerability

Overview

The changelog for AhsayOBS 6.11 included several important security fixes. These vulnerabilities allow an unauthenticated remote attacker to extract a list of your customers, as well as any file from your server. All AhsayOBS versions from 6.0 through 6.9.4.2 inclusive appear to be affected by this issue. Version 5.x does not appear to be affected at this time.

If you are using any API client - either MyClient or another system - without the URL Rewriting feature, your AhsayOBS administrator password may also be at risk.

MyClient strongly recommends using one of the following workarounds to resolve this issue.

Option 1: Upgrade to AhsayOBS 6.11 or newer

The method recommended by Ahsay is to use the latest version of AhsayOBS. This issue is corrected in version 6.11. Alternatively, you may download and install the [unofficial hotfix 6.9.4.4](#).

Users of previous AhsayOBS 6.x versions who are not willing or able to upgrade to the latest version should consider the alternative workarounds.

Option 2: Make minor changes to `struts-config.xml`

A preventative measure can be applied to close this vulnerability. This will have a minor cosmetic effect on your AhsayOBS Web Console.

1. Open the file `AhsayOBS/webapps/obs/WEB-INF/struts-config.xml`.
2. Find the lines concerning `com.ahsay.obs.www.GetDocument`.
3. Remove or `<!-- comment -->` the lines from `<action>to</action>` inclusive.
4. Repeat the above for `com.ahsay.obs.www.GetLogo`.
5. Restart the OBS server process.

Option 3: Modify the URL-rewriting configuration

If you are already using [URL Rewriting with MyClient](#) on your AhsayOBS server, you can avoid the need to restart the AhsayOBS process by applying the mitigation using URL rewriting. This will have a minor cosmetic effect on your AhsayOBS Web Console.

In the file `webapps/obs/WEB-INF/urlrewrite.xml`, add the following lines within the `<urlrewrite>` section:

```
<rule>
  <from>^.*(getDocument\.do) |(getLogo\.do) .*$/from>
  <set type="status">404</set>
  <to>null</to>
</rule>
```



Workaround for AhsayOBS 6.x - 6.17.x.x vulnerability

Overview

The changelog for AhsayOBS 6.19.0.0 contained a mitigation for an unspecified potential vulnerability in all prior 6.x versions.

Severity

An attacker may be able to retrieve your whitelisted IP ranges, or other content of the `web.xml` file. An attacker may also be able to determine the exact version of AhsayOBS in use. If you are using [URL Rewriting](#) for your AhsayOBS installation, the vulnerability can be used to retrieve your AhsayOBS credentials.

The vulnerability has a low impact; but if you are using URL Rewriting without applying IP-address restrictions to the web console, then this vulnerability is critical.

Workarounds

1. UPGRADE TO AHSAYOBS 6.19.0.0 OR LATER

This vulnerability has a first-party mitigation as of AhsayOBS 6.19.0.0.

2. APPLY WORKAROUNDS AS PREVIOUSLY DETAILED

The workarounds described in our article [Workaround for AhsayOBS 6.x - 6.9.x.x vulnerability](#) will protect against exploiting this vulnerability.

Branding AhsayOBM/AhsayACB software

Overview

As an Ahsay partner, you have several methods available to brand the AhsayOBM/AhsayACB client software agents.

Fully-branded

FULLY-BRANDED BY ACP

The obvious first method is to use the Ahsay Customisation Portal to build a modified AhsayOBM/AhsayACB client. You can then host these downloads and add the URLs to MyClient. Then when a customer or reseller downloads their software from MyClient, they will receive the branded version.

This method is reliable, but has some disadvantages:

- The Ahsay Customisation Portal is complex to use, periodically unavailable, and very slow to build clients.
- It is easy to overlook a setting and accidentally produce an improperly branded client, requiring repeated slow regenerations.
- If you have more than a few resellers, it takes a significant amount of time to manage upgrading clients.
- It is prohibitively difficult to use the AUA system if customers have differently-branded software agents.

As a result, many partners who use this system avoid upgrading the client software at all, leading to bugs and lower quality of service for customers.

FULLY-BRANDED BY AUTOCLIENTS

MyClient supports taking an unbranded AhsayOBM/AhsayACB client, and wrapping it with a reseller's branding. This has the advantage of being trivial to keep up to date, and addresses many of the issues with the ACP approach above. Downloads are generated instantly at the time of request, using up-to-date branding and up-to-date software versions.

For more information, please see [Autoclients »](#)

Co-branded

CO-BRANDED BY ADGROUPS

The AhsayOBM/AhsayACB software agent can display a banner image and text inside the main interface. This provides a co-branded backup agent, where the customer might install the primary-branded software agent, but see information inside the software agent about contacting their reseller for first-tier support.

The AdGroup can be remotely set via the AhsayOBS web console, and MyClient supports setting the AdGroup for new and existing customers. However, once you have multiple AhsayOBS servers, it is prohibitively difficult to maintain AdGroups across all your AhsayOBS servers, and keep them synchronised and up-to-date whenever a reseller's logo or branding changes.

CO-BRANDED BY ADGROUPS, WITH MYCLIENT BANNERSYNC

MyClient has exclusive support for centralised management of AdGroups, automatically creating AdGroups on AhsayOBS servers and keeping them up-to-date. This addresses a number of issues with using the AdGroup feature directly.

For more information, please see [Bannersync \(Automatic AdGroup Management\) »](#)



Timezone Reference

Overview

This article compares timezone identifiers used by AhsayOBS, Olson timezone identifiers used by MyClient, and Windows timezone specifiers (excluding specific territory values). This reference file is intended to aid in troubleshooting timezone differences between clients, servers, and MyClient.

There is no 1:1 bijection between Ahsay timezones and Olson timezones, or between Olson timezones and Windows timezones. This may cause issues around edge cases such as Daylight Savings time. The AhsayOBM / AhsayACB client use the local Windows time to determine the JRE's timezone in Olson format, and schedule backups using this local time. AhsayOBS calculates expected schedule times and missed-backup notifications by converting the configured Ahsay timezone into Olson format.

Reference table

Ahsay	Olson (MyClient, Java JRE)	Windows
GMT-11:00 (GMT-11:00)	Etc/GMT+11	UTC-11
GMT-11:00 (WST)	Pacific/Apia	Samoa Standard Time
GMT-11:00 (SST)	Pacific/Pago_Pago	UTC-11
GMT-11:00 (NUT)	Pacific/Niue	UTC-11
GMT-10:00 (GMT-10:00)	Etc/GMT+10	Hawaiian Standard Time
GMT-10:00 (TKT)	Pacific/Fakaofu	Tonga Standard Time
GMT-10:00 (CKT)	Pacific/Rarotonga	Hawaiian Standard Time
GMT-10:00 (TAHT)	Pacific/Tahiti	Hawaiian Standard Time
GMT-07:00 (GMT-07:00)	Etc/GMT+7	US Mountain Standard Time
GMT-06:00 (EDT)	America/Rankin_Inlet	Central Standard Time
GMT-06:00 (GMT-06:00)	Etc/GMT+6	Central America Standard Time
GMT-06:00 (GALT)	Pacific/Galapagos	Central America Standard Time
GMT-05:00 (COT)	America/Bogota	SA Pacific Standard Time
GMT-05:00 (ECT)	America/Guayaquil	SA Pacific Standard Time
GMT-05:00 (PET)	America/Lima	SA Pacific Standard Time
GMT-05:00 (GMT-05:00)	Etc/GMT+5	SA Pacific Standard Time
GMT-04:00 (PYT)	America/Asuncion	Paraguay Standard Time
GMT-04:00 (VET)	America/Caracas	Venezuela Standard Time
GMT-04:00 (GYT)	America/Guyana	SA Western Standard Time
GMT-04:00 (BOT)	America/La_Paz	SA Western Standard Time
GMT-04:00 (I)	Atlantic/Stanley	SA Eastern Standard Time
GMT-04:00 (GMT-04:00)	Etc/GMT+4	SA Western Standard Time
GMT-03:00 (GFT)	America/Cayenne	SA Eastern Standard Time
GMT-03:00 (WGST)	America/Godthab	Greenland Standard Time
GMT-03:00 (UYT)	America/Montevideo	Montevideo Standard Time
GMT-03:00 (SRT)	America/Paramaribo	SA Eastern Standard Time
GMT-03:00 (ROTT)	Antarctica/Rothera	SA Eastern Standard Time
GMT-03:00 (GMT-03:00)	Etc/GMT+3	SA Eastern Standard Time
GMT-02:00 (GST)	Atlantic/South_Georgia	UTC-02
GMT-02:00 (GMT-02:00)	Etc/GMT+2	UTC-02
GMT-01:00 (EGST)	America/Scoresbysund	Azores Standard Time
GMT-01:00 (AZOST)	Atlantic/Azores	Azores Standard Time
GMT-01:00 (CVT)	Atlantic/Cape_Verde	Cape Verde Standard Time
GMT-01:00 (GMT-01:00)	Etc/GMT+1	Cape Verde Standard Time
GMT+00:00 (WET)	Africa/El_Aaiun	Morocco Standard Time
GMT+00:00 (IST)	Europe/Dublin	GMT Standard Time
GMT+00:00 (BST)	Europe/London	GMT Standard Time
GMT+01:00 (CET)	Africa/Tunis	W. Central Africa Standard Time
GMT+01:00 (WAT)	Africa/Windhoek	Namibia Standard Time
GMT+01:00 (GMT+01:00)	Etc/GMT-1	W. Central Africa Standard Time
GMT+02:00 (SAST)	Africa/Maseru	South Africa Standard Time
GMT+02:00 (SAST)	Africa/Mbabane	South Africa Standard Time
GMT+02:00 (GMT+02:00)	Etc/GMT-2	South Africa Standard Time
GMT+03:00 (EAT)	Indian/Antananarivo	E. Africa Standard Time



Ahsay	Olson (MyClient, Java JRE)	Windows
GMT+03:00 (EAT)	Indian/Comoro	E. Africa Standard Time
GMT+03:00 (EAT)	Indian/Mayotte	E. Africa Standard Time
GMT+03:00 (SYOT)	Antarctica/Syowa	E. Africa Standard Time
GMT+03:00 (AST)	Asia/Bahrain	Arab Standard Time
GMT+03:00 (AST)	Asia/Kuwait	Arab Standard Time
GMT+03:00 (AST)	Asia/Qatar	Arab Standard Time
GMT+03:00 (AST)	Asia/Riyadh	Arab Standard Time
GMT+03:00 (ADT)	Asia/Baghdad	Arabic Standard Time
GMT+03:00 (GMT+03:00)	Etc/GMT-3	E. Africa Standard Time
GMT+04:00 (AQST)	Asia/Aqtau	West Asia Standard Time
GMT+04:00 (AZST)	Asia/Baku	Azerbaijan Standard Time
GMT+04:00 (GST)	Asia/Dubai	Arabian Standard Time
GMT+04:00 (GST)	Asia/Muscat	Arabian Standard Time
GMT+04:00 (ORAST)	Asia/Oral	West Asia Standard Time
GMT+04:00 (GEST)	Asia/Tbilisi	Georgian Standard Time
GMT+04:00 (GMT+04:00)	Etc/GMT-4	Arabian Standard Time
GMT+04:00 (SAMST)	Europe/Samara	Russia Time Zone 3
GMT+04:00 (SCT)	Indian/Mahe	Mauritius Standard Time
GMT+04:00 (MUT)	Indian/Mauritius	Mauritius Standard Time
GMT+04:00 (RET)	Indian/Reunion	Mauritius Standard Time
GMT+05:00 (AQST)	Asia/Aqtobe	West Asia Standard Time
GMT+05:00 (TMT)	Asia/Samarkand	West Asia Standard Time
GMT+05:00 (KGST)	Asia/Bishkek	Central Asia Standard Time
GMT+05:00 (TJT)	Asia/Dushanbe	West Asia Standard Time
GMT+05:00 (UZT)	Asia/Tashkent	West Asia Standard Time
GMT+05:00 (YEKST)	Asia/Yekaterinburg	Ekaterinburg Standard Time
GMT+05:00 (GMT+05:00)	Etc/GMT-5	West Asia Standard Time
GMT+05:00 (TFT)	Indian/Kerguelen	West Asia Standard Time
GMT+05:00 (MVT)	Indian/Maldives	West Asia Standard Time
GMT+06:00 (MAWT)	Antarctica/Mawson	West Asia Standard Time
GMT+06:00 (VOST)	Antarctica/Vostok	Central Asia Standard Time
GMT+06:00 (ALMST)	Asia/Almaty	Central Asia Standard Time
GMT+06:00 (LKT)	Asia/Colombo	Sri Lanka Standard Time
GMT+06:00 (NOVST)	Asia/Novosibirsk	N. Central Asia Standard Time
GMT+06:00 (OMSST)	Asia/Omsk	N. Central Asia Standard Time
GMT+06:00 (QYZST)	Asia/Qyzylorda	Central Asia Standard Time
GMT+06:00 (BTT)	Asia/Thimphu	Bangladesh Standard Time
GMT+06:00 (GMT+06:00)	Etc/GMT-6	Central Asia Standard Time
GMT+06:00 (IOT)	Indian/Chagos	Central Asia Standard Time
GMT+07:00 (DAVT)	Antarctica/Davis	SE Asia Standard Time
GMT+07:00 (HOVT)	Asia/Hovd	SE Asia Standard Time
GMT+07:00 (WIT)	Asia/Pontianak	SE Asia Standard Time
GMT+07:00 (KRAST)	Asia/Krasnoyarsk	North Asia Standard Time
GMT+07:00 (GMT+07:00)	Etc/GMT-7	SE Asia Standard Time
GMT+07:00 (CXT)	Indian/Christmas	SE Asia Standard Time
GMT+08:00 (WST)	Australia/Perth	W. Australia Standard Time
GMT+08:00 (BNT)	Asia/Brunei	Singapore Standard Time
GMT+08:00 (IRKST)	Asia/Irkutsk	North Asia East Standard Time
GMT+08:00 (MYT)	Asia/Kuala_Lumpur	Singapore Standard Time
GMT+08:00 (MYT)	Asia/Kuching	Singapore Standard Time
GMT+08:00 (PHT)	Asia/Manila	Singapore Standard Time
GMT+08:00 (ULAT)	Asia/Ulaanbaatar	Ulaanbaatar Standard Time
GMT+08:00 (GMT+08:00)	Etc/GMT-8	Singapore Standard Time
GMT+09:00 (CHOT)	Asia/Choibalsan	Ulaanbaatar Standard Time
GMT+09:00 (TPT)	Asia/Dili	Tokyo Standard Time
GMT+09:00 (EIT)	Asia/Jayapura	Tokyo Standard Time
GMT+09:00 (YAKST)	Asia/Yakutsk	Yakutsk Standard Time



Ahsay	Olson (MyClient, Java JRE)	Windows
GMT+09:00 (GMT+09:00)	Etc/GMT-9	Tokyo Standard Time
GMT+09:00 (PWT)	Pacific/Palau	Tokyo Standard Time
GMT+10:00 (EST)	Australia/Brisbane	E. Australia Standard Time
GMT+10:00 (EST)	Australia/Hobart	Tasmania Standard Time
GMT+10:00 (EST)	Australia/Lindeman	E. Australia Standard Time
GMT+10:00 (EST)	Australia/Melbourne	AUS Eastern Standard Time
GMT+10:00 (EST)	Australia/Sydney	AUS Eastern Standard Time
GMT+10:00 (DDUT)	Antarctica/DumontDURville	West Pacific Standard Time
GMT+10:00 (SAKST)	Asia/Sakhalin	Vladivostok Standard Time
GMT+10:00 (VLAST)	Asia/Vladivostok	Vladivostok Standard Time
GMT+10:00 (GMT+10:00)	Etc/GMT-10	West Pacific Standard Time
GMT+10:00 (ChST)	Pacific/Saipan	West Pacific Standard Time
GMT+10:00 (PGT)	Pacific/Port_Moresby	West Pacific Standard Time
GMT+10:00 (TRUT)	Pacific/Truk	West Pacific Standard Time
GMT+11:00 (MAGST)	Asia/Magadan	Magadan Standard Time
GMT+11:00 (GMT+11:00)	Etc/GMT-11	Central Pacific Standard Time
GMT+11:00 (VUT)	Pacific/Efate	Central Pacific Standard Time
GMT+11:00 (KOST)	Pacific/Kosrae	Central Pacific Standard Time
GMT+11:00 (NCT)	Pacific/Noumea	Central Pacific Standard Time
GMT+11:00 (PONT)	Pacific/Ponape	Central Pacific Standard Time
GMT+12:00 (NZST)	Pacific/Auckland	New Zealand Standard Time
GMT+12:00 (ANAST)	Asia/Anadyr	Russia Time Zone 11
GMT+12:00 (PETST)	Asia/Kamchatka	Russia Time Zone 11
GMT+12:00 (GMT+12:00)	Etc/GMT-12	UTC+12
GMT+12:00 (MHT)	Pacific/Kwajalein	UTC+12
GMT+12:00 (MHT)	Pacific/Majuro	UTC+12
GMT+12:00 (FJT)	Pacific/Fiji	Fiji Standard Time
GMT+12:00 (TVT)	Pacific/Funafuti	UTC+12
GMT+12:00 (NRT)	Pacific/Nauru	UTC+12
GMT+12:00 (GILT)	Pacific/Tarawa	UTC+12
GMT+12:00 (WAKT)	Pacific/Wake	UTC+12