# Connected Backup

Software Version 9.0.7

Installing PC Agents



Document Release Date: December 2022 Software Release Date: December 2022

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# Contents

Chapter 1: Install	6
Preparation	6
Existing Agent configuration	6
User computer system requirements	6
System permissions	6
Distribution methods	
Use Account Management Website	7
Administrator Tasks	7
Agent installation	
Use the command-line installation program	
Administrator Tasks	
Agent installation	
Examples	10
Example 1	
Example 2	
Example 3	
Example 4	
Example 5	
Use disk image installation	11
Administrator Tasks	
Agent installation using Agent Installation Wizard	
Agent installation using command-line installation program	12
Activate disk image installation Agents	
Multiple language support	14
Chapter 2: Recover/Reinstall	
Preparation	
User computer system requirements	
System permissions	
Allow Computer Name Change	
Recovery methods	
Use the Account Management Website	
Use the Agent Startup Wizard	
Use a disk image installation Agent	
Use the command-line installation program	
Administrator tasks	
Account recovery	
Example	

Chapter 3: Upgrade	
Scenarios	21
Upgrade methods	21
Use central administration	
Upgrade from 8.x Agents to this release	
Use the command-line installation program	
Upgrade from 8.x Agents to this release	
Use UpdateConfiguration Use UpdateConfiguration command-line options	
Examples	
Example 1	
Example 2	
Chapter 4: Remove/Uninstall	
Before you begin	
Removal methods	
Use Control Panel	27
Use the Agent Installation Wizard	
Use the command-line installation program	
Chapter 5: Reference	
Command-line Agent setup file parameters	
REGISTRATIONFILE Fields	
Sample XML file content	
Activate command	
Agent setup transforms	
GetSettings Command	40
Examples	41
Example 1	
Example 2	
Example 3	41
Appendix A: Sample user instructions	42
Register an account and install an Agent	
Step 1: Register your backup account	
Step 2: Install an Agent on your computer	
Step 3: Open the Agent for the first time after installation	
Step 4: Start your first backup	
Index	

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# Chapter 1: Install

This chapter describes how to install Micro Focus Connected Backup Agents.

- Preparation, below
- Distribution methods, below
- Multiple language support, on page 14

## Preparation

To install a Connected Backup Agent on a computer, you must meet the following requirements:

- Existing Agent Configuration
- User computer system requirements
- System permissions

#### **Existing Agent configuration**

To deploy Agents, you must create an Agent configuration in Support Center. An Agent configuration contains the features and settings that comprise an Agent, including the Agent version and the default file selection rules.

For more information, see Administering PC Agents guide and Support Center Help.

#### User computer system requirements

For requirements that a computer must meet before you can install the Agent, see *Connected Backup Requirements Matrix* guide.

#### System permissions

To install an Agent, you must log on to the computer with local administrator privileges during the Agent installation process.

# **Distribution methods**

After you have established that the Agent system requirements have been met, choose from the following available Agent distribution methods:

- Using the Account Management Website
- Using the command-line installation program
- Using disk image pre-install

#### Use Account Management Website

Account Management Website enables users to manage their own accounts, which includes the following tasks:

- Create a new Connected Backup account.
- Download an Agent Setup file.
- Install the Agent on a computer.

**NOTE:** For information about how to access Account Management Website, contact the Data Center administrator.

#### **Administrator Tasks**

#### To obtain the URL for the Agent configuration to use for the Agent deployment

- 1. Open a Web browser, and then sign in to Support Center.
- 2. Navigate to the community where you want to create the account. The community contains the Agent configuration to deploy.
- 3. Expand the **Configurations** node, and then expand the **PC** subnode.

**NOTE:** You cannot create accounts in the root community. If you create an Agent configuration in the root community, to obtain a URL, navigate to a subcommunity.

- 4. Select the name of the Agent configuration to deploy.
- 5. On the View or Edit PC Agent Configuration page, scroll to the bottom of the page, and then copy the Account Management Registration URL.

**NOTE:** The Account Management Registration URL is case sensitive.

You can now provide the Account Management Registration URL to your users to begin the Agent deployment process.

#### Agent installation

#### To use Account Management Website to install an Agent on a computer

- 1. On the user's computer, open a Web browser, and then navigate to the Account Management Registration URL.
- 2. On the Welcome page, click **Register and Download**.

If your account requires acceptance of the Service License Agreement, AMWS displays it.

3. To accept the Service License Agreement, if required, click Accept.

If you click **Decline**, the registration process stops and you cannot download the Agent Setup file.

- 4. If the system prompts you for one of the following pieces of information, provide the required information:
  - **Reservation account code**. Enter the code that you received from your system administrator, and then click **Continue**.
  - Network Logon ID. Enter the network logon ID (or user name) and password, and then click Continue.
  - Single sign-on account credentials. Provide the requested information to sign in.
- 5. If the **Registration** page appears, enter the required information, and then click **Continue**. Be sure to complete required fields, which are marked with an asterisk.

**NOTE:** Passwords for native Connected Backup accounts must meet the following requirements:

- contain a minimum of six alphanumeric characters
- contain a maximum of 100 alphanumeric characters
- contain at least one character that is different from the other characters

Remember the e-mail address and password that you enter during this step. You need this information to sign in to AMWS to finish the Agent installation and manage the account.

6. To create the Agent Setup file for the computer, click Download Software.

The Preparing the Software to Download page opens. When the file is ready, the Web browser displays the Download Instructions page.

7. Click **Begin Download**, and then save the Agent Setup file to a folder on your computer.

**NOTE:** The Agent Setup file is bound to the account number created for the user during the registration process. You cannot use the Agent Setup file install the Connected Backup Agent for other users.

- 8. To start the installation, navigate to the folder that contains the Agent Setup file. And then double-click AgentSetup.zip to extract the AgentSetup.msi setup file.
- 9. Follow the on-screen instructions to complete the installation.

When the installation completes, the Installation Complete dialog box opens.

- 10. To exit the Agent Setup program, click **Finish**.
- 11. When the Agent starts, at the prompt, enter your account credentials:
  - If you specified a password during the registration process, enter that password.
  - If your account is mapped to an LDAP or Single Sign-On account, enter the credentials for that account.

You see this prompt only the first time that you open the Agent after its initial installation.

The Connected Backup Agent is now available for use on the user's computer.

#### Use the command-line installation program

An Agent Setup file that is not directly associated with one account is available from Support Center for Agent configurations. This generic Agent Setup file enables you to distribute the Agent to multiple users' computers, and then install an account via the command-line.

The command-line installation method enables you to use any file distribution method to create scripts or wrappers and distribute the Agent Setup file to multiple clients. You also can use third-party file distribution software such as IBM Tivoli, CA TNG, or Microsoft SCCM.

#### **Administrator Tasks**

#### To obtain the Agent Setup file to use for the Agent deployment

- 1. Open a Web browser, and then sign in to Support Center.
- 2. In the community where you created the Agent configuration to deploy, expand the **Configurations** node, and then expand the **PC** subnode.
- 3. Select the name of the Agent configuration to deploy.
- 4. On the View or Edit PC Agent Configuration page menu, click **Download**.

The Download Agent Setup page opens.

5. Click Download.

The Save As dialog box opens.

6. Navigate to the folder in which you want to save the Agent Setup file, and then click **Save**.

To deploy the Agents, use the Agent Setup file you downloaded.

#### Agent installation

To install the Agent on users' computers with the downloaded Agent Setup file, type the following command:

msiexec verbosity\_mode /i path\AgentSetup.msi parameters logging

#### where

*verbosity\_mode* is one of the following standard options of the msiexec tool:

Option	Description
/qn	None. No graphical interface
/qb	Basic. Displays Microsoft Windows progress and error dialog boxes
/qr	Reduced. Displays Connected Backup progress and error dialog boxes
/qf	Full (Default). Displays all Connected Backup progress, error, and completion dialog boxes

If you do not specify a verbosity mode, the installation uses the default mode (/qf).

**NOTE:** When you use the command-line installation program to install, recover, or upgrade an Agent, you must use the /qb verbosity mode on Windows 7 or later computers if UAC is enabled and set to any level other than **Never notify**.

- path is the path name that contains the install file.
- *parameters* is one or more of the Agent Setup command-line parameters. For a complete list of available parameters, see Command-line Agent setup file parameters, on page 29.
- logging is an optional attribute of the msiexec tool to enable logging for the installation attempt. It consists of the verbose logging option of the msiexec tool and a file name for the logs to be saved to in the following format:

/l\*v log\_file

where

*Log\_file* is a filename to use for saved logging.

#### Examples

The following examples represent some uses of the command-line installation method to install a Connected Backup Agent:

#### Example 1

Agent install without user intervention no on-screen prompts or displays:

msiexec /qn /i AgentSetup.msi

#### Example 2

Agent install with basic on-screen prompts or displays, and installation logs stored in c:\log file.txt:

msiexec /qb /i AgentSetup.msi /l\*v "c:\log file.txt"

**NOTE:** Whenever spaces exist in any command-line parameter, enclose the parameter in double-quotes (").

#### Example 3

Agent install with no on-screen prompts or displays, connecting to Active Directory account jbloggs, and backing up immediately after installation and registration:

msiexec /qn /i AgentSetup.msi LDAPID=jbloggs FIRSTBACKUP=1

#### Example 4

Agent install for an account reserved with code ticket1, with no on-screen prompts or displays, and using e-mail address joe.bloggs@mycompany.com and a password of password1:

msiexec /qn /i AgentSetup.msi RESERVATIONCODE=ticket1 EMAILADDRESS=joe.bloggs@mycompany.com PASSWORD=password1

#### Example 5

Agent install in a community configured for single sign-on for jbloggs account with no on-screen prompts or displays, and backing up immediately after installation and registration:

```
msiexec /qn /i AgentSetup.msi ACCOUNTUID=jbloggs FIRSTBACKUP=1
```

#### Use disk image installation

If you use pre-configured disk images for your computers, you can create and use an Agent Setup file not already associated with a Connected Backup account to install Agents. After you use a third-party disk-imaging tool to place the disk image that contains an unregistered Agent on a user's computer, either the user or an administrator can activate Agent through a provided application, and the Data Center assigns the Agent an account number. The Agent can then back up to and retrieve files from the Data Center.

Since these unregistered Agent installations do not have account numbers, they do not use a license on the Data Center until they are activated by the user or an administrator.

**NOTE:** For each Data Center environment that your users connect to, create a separate disk image that uses separate Agent Setup files.

#### **Administrator Tasks**

#### To obtain the Agent Setup file to use for the Agent deployment

- 1. Open a Web browser, and then sign in to Support Center.
- 2. In the community where you created the Agent configuration to deploy, expand the **Configurations** node, and then expand the **PC** subnode.
- 3. Select the name of the Agent configuration to deploy.
- 4. On the View or Edit PC Agent Configuration page menu, click **Download**.

The Download Agent Setup page opens.

5. Click Download.

The Save As dialog box opens.

**NOTE:** Do not change the name of the AgentSetup.msi file. If you do, you cannot use central administration to upgrade Agents.

6. Navigate to the folder in which you want to save the Agent Setup file, and then click **Save**.

You now can begin the Agent deployment process using the downloaded Agent Setup file.

#### Agent installation using Agent Installation Wizard

#### To install the Agent on a disk image without registering an account number

1. Navigate to the folder that contains the Agent Setup file, and then double-click AgentSetup.msi.

The Welcome window opens.

- 2. Select one of the following options:
  - Create a disk image with a running service. Installs an inactive Agent on the computer that users without administrator privileges can activate.
  - Create a disk image only. Installs an inactive Agent on the computer that requires a user with administrator privileges to activate.

The User License Agreement window appears.

- 3. Click Next.
- 4. Follow the on-screen instructions to complete the installation.

When the installation is complete, the Installation Complete dialog opens.

5. To exit the Agent Setup program, click **Finish**.

The Connected Backup Agent is now installed on the computer. This Agent is not associated with any accounts on the Data Center, and must be activated before computer backups are attempted.

#### Agent installation using command-line installation program

To use the command-line installation program to install an Agent on a disk image, but not register an account on the Data Center, type the following command:

msiexec verbosity\_mode /i path\AgentSetup.msi DISKIMAGE=option logging

where

verbosity mode is one of the	e following standard	l options of the msiexec tool:

Option	Description
/qn	None - no graphical interface
/qb	Basic - displays Microsoft Windows progress and error dialog boxes
/qr	Reduced - displays Connected Backup progress and error dialog boxes
/qf	Full (Default) - displays all Connected Backup progress, error, and completion dialog boxes

If you do not specify a verbosity mode, the installation uses the default mode (/qf).

- path is the path name that contains the install file.
- option is one of the following disk image installation options:

Option	Description
serviceon	Installs an inactive Agent on the computer that users without administrator privileges can activate.
serviceoff	Installs an inactive Agent on the computer that requires a user with administrator privileges to activate.

If you do not specify an option for DISKIMAGE, an active Agent is installed by the commandline program. For more information about this parameter, see Command-line Agent setup file parameters, on page 29.

• *Logging* is an optional attribute of the msiexec tool to enable logging for the installation attempt. It consists of the verbose logging option of the msiexec tool and a file name for the logs to be saved to in the following format:

/l\*v log\_file

where

log\_file is a filename to use for saved logging.

The Connected Backup Agent is now installed on the computer. This Agent is not associated with any accounts on the Data Center, and must be activated before computer backups are attempted.

#### Activate disk image installation Agents

Agents installed with these methods are inactive Agents, that do not back up files until an administrator or a user activates them.

#### To activate an Agent for users without administrator privileges

- 1. Start the Connected Backup Agent.
- 2. Click Activate Now.

The Agent connects to the Data Center and registers an active account.

#### To activate an Agent that requires a user with administrator privileges to activate

- 1. Open a Command Prompt window on the computer with the disk image pre-installed Agent.
- 2. Change the path to the Agent installation directory.
- 3. To activate the Agent, type the following command:

activate.exe -registernow

The Agent connects to the Data Center and registers an active account.

For more information about additional command-line parameters for the Activate application, see Activate command, on page 36.

# Multiple language support

Each Agent supports multiple languages. By default, the Agent displays text in the language specified by the computer's **Region and Language** settings in Control Panel. If the Agent does not support the specified language, it displays text in English (United States).

If necessary, you can override the Agent's use of the **Region and Language** setting so that the Agent displays text in a different language than the operating system. For example, if the **Region and Language** setting is German, you can configure the Agent to display its text in English (United States).

**NOTE:** The Agent Setup file (AgentSetup.msi) does not support multiple languages and does not base its language on the **Region and Language** setting of the computer.

The Setup file and its Setup Wizard, which performs interactive installations, display text only in the language defined by the Agent version specified in the Agent Configuration. The Agent installed, however, does support multiple languages.

#### To specify an Agent's display language

- 1. To specify the display language for both the Agent and the operating system, select the language in the **Region and Language** settings in Control Panel.
- 2. To specify a display language for the Agent that differs from the one that the operating system uses, perform the following:
  - a. In the Windows registry, locate the Agent subkey.

The registry location of this key depends on the type of operating system:

- 32-bit Windows: HKLM\Software\Connected\Agent\
- 64-bit Windows: HKLM\Software\Wow6432Node\Connected\Agent\
- b. If the **Agent** key does not already contain a **CultureOverrideCode** entry, create it in String format.
- c. Set the value of the **CultureOverrideCode** entry to one of the language tags that Connected Backup supports.

For example, to set the language to Italian, set the value to it-IT.

International versions of Agents typically support the following language tags:

- de-DE. German
- en-US. English (United States)
- es-ES. Spanish
- fr-FR. French
- it-IT. Italian
- ja-JP. Japanese
- ko-KR. Korean

- **nI-NL**. Dutch (Netherlands)
- pt-BR. Portuguese (Brazil)
- **pt-PT**. Portuguese (Portugal)
- **zh-CN**. Chinese (Simplified)

To see which languages a specific version of Connected Backup supports, see the *Connected Backup Application Localization Matrix* for that version.

- 3. Restart the Agent to activate the new language. To do so, either:
  - Restart the computer.
  - Use Windows Task Manager to end the ConnectedAgent.exe process, and then restart the Agent.

# Chapter 2: Recover/Reinstall

This chapter describes how to recover and reinstall Agents.

- Preparation, below
- Recovery methods, below

# Preparation

If your computer experiences a problem or you replace your computer's hard drive, you can reinstall the Connected Backup Agent and then reconnect to your existing account on the Data Center.

To recover an account, the following requirements must be met:

- User computer system requirements
- System permissions
- Allow computer name change

#### User computer system requirements

For requirements that a computer must meet before you can install the Agent, see *Connected Backup Requirements Matrix* guide.

#### System permissions

To install an Agent, you must log on to the computer with local administrator privileges during the Agent installation process.

#### **Allow Computer Name Change**

To recover a previously existing account from one computer to a new computer with a different computer name, use Support Center to allow a computer name change for the account. Additionally, if you plan to recover an account originally installed on a computer with a 32-bit operating system onto a computer with a 64-bit operating system (even if it is the same computer), use Support Center to configure the Agent to allow a computer name change.

For more information, see Support Center Help.

### **Recovery methods**

You can recover accounts in the following ways:

- Using the Account Management Website
- Using the Agent Startup Wizard
- Using a disk image pre-install Agent
- Using the command-line installation program

#### **Use the Account Management Website**

You can access the Account Management Website for the user's account and download a new Agent Setup file to reinstall the Agent.

#### To recover a user's account using the Account Management Website

1. Open a Web browser, and then sign in to the user's Account Management Website.

To sign in, use the credentials associated with the account, or select the **Access User's Online Account** link on the account's summary page in Support Center.

**NOTE:** In order to see the **Access User's Online Account** link in Support Center, be sure that your technician account has the Access Users' Data permission. If you do not have this permission, you cannot see or use the link.

The Account Management Website opens with the user's account information.

- 2. Select Reinstall Agent.
- 3. Click Download Software.
- 4. To reinstall the Agent, follow the instructions on the Download Instructions page.

The Connected Backup Agent is installed and reconnected to the user's account. The Agent is now available for use on the user's computer.

#### **Use the Agent Startup Wizard**

You can let users recover their own accounts if the accounts' Agent configurations include the use of the Agent Startup Wizard. For more information about how to enable the Agent Startup Wizard in the Agent Settings for an Agent configuration, see Support Center Help.

#### To use the Agent Startup Wizard to recover an account

1. Navigate to the folder that contains the Agent Setup file, and then double-click AgentSetup.msi.

**NOTE:** Use the same Agent Setup file that was used to install the Agent. If the original Agent Setup file is not on the computer, download from Support Center an Agent Setup file that uses the same Agent version installed on the computer.

- 2. In the Startup Options window, select **Recover an existing backup account**, and then click **Next**.
- 3. Follow the prompts and enter the information required to recover your account.

The Connected Backup Agent is installed and reconnected to the user's account. The Agent is now available for use on the user's computer.

#### Use a disk image installation Agent

You can use an Agent installed as part of a disk image that has not yet been used to register an account in order to recover an existing account, as long as the Agent configuration in use includes the use of the Agent Setup Wizard. For more information about how to enable the Agent Startup Wizard in the Agent Settings for an Agent configuration, refer to Support Center Help.

To use a disk image installation Agent to recover an account, activate the account, and then use the Agent Setup Wizard recovery procedure to complete the account recovery. For more information about Agent activation, see Activate disk image installation Agents, on page 13. For more information about how to use the Agent Setup Wizard to recover an account, see Use the Agent Startup Wizard, on the previous page.

#### Use the command-line installation program

You can use the command-line installation program to recover version 7.x and version 8.x accounts. You do not have to know the version of an account before you recover it if you're recovering to the newest 8.x Agent version. The Agent handles this circumstance automatically.

**NOTE:** When you use the command-line installation account recovery method to upgrade an account from version 7.x to version 8.x, the installation program removes local rules and file selections that the user created, and installs the default 8.x Agent configuration for the community (not the Agent configuration associated with the Agent Setup file).

#### Administrator tasks

#### To obtain the Agent Setup file to use for the account recovery

- 1. Open a Web browser, and then sign in to Support Center.
- 2. In the community where you created the Agent configuration to deploy, expand the **Configurations** node, and then expand the **PC** subnode.
- 3. Select the name of the Agent configuration in use by the account.
- 4. On the View or Edit PC Agent Configuration page menu, click **Download**.

The Download Agent Setup page opens.

5. Click **Download**.

The Save As dialog box opens.

**NOTE:** Do not change the name of the AgentSetup.msi file. If you do, you cannot use central administration to upgrade Agents.

6. Change the folder to the directory you want to save the Agent Setup file in, and then click Save.

You can now begin the account recovery process using the downloaded Agent Setup file.

#### Account recovery

To use the downloaded Agent Setup file to recover an account on a user's computer, type the following command:

msiexec verbosity\_mode /i path\AgentSetup.msi ACCOUNTNUMBER=account\_number
parameters logging

where

• verbosity\_mode is one of the following standard options of the msiexec tool:

Option	Description
/qn	None. No graphical interface.
/qb	Basic. Displays Microsoft Windows progress and error dialogs.
/qr	Reduced. Displays Connected Backup progress and error dialogs.
/qf	Full (Default). Displays all Connected Backup progress, error, and completion dialogs.

If you do not specify a verbosity mode, the installation uses the default mode (/qf).

**NOTE:** When you use the command-line installation program to install, recover, or upgrade an Agent, you must use the /qb verbosity mode on Windows 7 or later computers if UAC is enabled and set to any level other than **Never notify**.

- path is the path name that contains the install file.
- *account\_number* is the number of the account that you want to recover. Use the following syntax: nnnnn-nnnnn.

**NOTE:** The msiexec tool supports the ACCOUNTNUMBER parameter for SSO-enabled accounts only when the tool runs in silent mode (/qn or/qb verbosity).

Options	Description
TECHID=technician_ id PASSWORD= technician_password	Recovers account using a technician ID. Both TECHID and PASSWORD are required, and require the technician ID and technician password, respectively.
	To recover an SSO account in silent mode (/qn or /qb verbosity), you must use a non-SSO technician ID.
USERPASSWORD= user_password	Recovers account using the user's account password information. The user_password is the password associated with the Connected Backup account.

• *parameters* is one of the following Agent Setup command-line parameter options:

**NOTE:** Be sure that your technician ID has the **Access Users' Data** permission. If you do not have this permission, you cannot use the TECHID/PASSWORD option to recover an account.

For a complete list of available parameters, see Command-line Agent setup file parameters, on page 29.

• *Logging* is an optional attribute of the msiexec tool to enable logging for the installation attempt. It consists of the verbose logging option of the msiexec tool and a file name for the logs to be saved to in the following format:

/l\*v *log\_file* 

where

*Log\_file* is a filename to use for saved logging.

The Connected Backup Agent is installed and reconnected to the user's account. The Agent is now available for use on the user's computer.

#### Example

The following example demonstrates the use of the command-line installation method to recover an account:

Recover a user account with account number 10100-55436, using technician ID sampletech and a technician password of stpassword123!, with no on-screen prompts or displays:

msiexec /qn /i AgentSetup.msi ACCOUNTNUMBER=10100-55436 TECHID=sampletech
PASSWORD=stpassword123!

# Chapter 3: Upgrade

This chapter describes how to upgrade Agents.

- Scenarios, below
- Upgrade methods, below

For information on upgrade path, see the latest Connected Backup Release Notes.

## Scenarios

You can use the Agent upgrade process to install a newer version of an Agent on users' computers and also to change the Agent configuration in use by accounts. When you change the Agent configuration an Agent uses, you can configure the following attributes:

- Profile and Website settings
- Agent settings
- File selection rules
- Displayed Agent language

# Upgrade methods

Choose from the following available Agent upgrade methods:

- Use central administration
- Use the command-line installation program
- Use UpdateConfiguration

#### Use central administration

Use the central administration feature of Support Center to upgrade Agents to new Agent versions with minimal user interaction.

This option lets you use Support Center to upgrade Connected Backup Agents to newer versions without the use of third-party system management tools.

#### Upgrade from 8.x Agents to this release

You cannot upgrade directly to this release from an Agent version 8.x earlier than 8.4. Depending on which 8.x Agent version you start with, use the tasks in this topic once or twice to upgrade to the current Agent version.

#### To use central administration to upgrade a single version 8.x Agent

1. Open a Web browser, and then sign in to Support Center.

**NOTE:** Be sure that your technician account has the Change the Agent Configuration of Accounts permission. If you do not have this permission, you cannot complete this process.

2. Enable central administration for the community that contains the account associated with the Agent to be upgraded if it has not already been enabled.

For more information about how to enable central administration, refer to Support Center Help.

- 3. Search for the account.
- 4. If Support Center displays multiple results, click the appropriate account number.

The Account Summary page opens.

5. Select Assigned Configuration.

The Change Agent Configuration page opens.

6. Select the new Agent configuration for the account from the list of available Agent configurations, and then click **Save and Deploy**.

The Data Center configures the account to use the new Agent configuration. The Data Center then changes the user's Agent to the assigned Agent configuration during the Agent synchronization of the next backup.

#### To use central administration to upgrade multiple version 8.x Agents at the same time

1. Open a Web browser, and then sign in to Support Center.

**NOTE:** Be sure that your technician account has the Change the Agent Configuration of Accounts and Run Reports permissions. If you do not have these permissions, you cannot complete this process.

For more information about how to set technician account permissions, see Support Center Help.

2. Enable central administration for the community that contains the account associated with the Agent to be upgraded if it has not already been enabled.

For more information about central administration, see Support Center Help.

3. Create a report template to generate a report that lists the accounts to be upgraded to a new Agent configuration.

For more information about how to create report templates, see Support Center Help.

- 4. On the page for the created report template, click **Run Report**.
- 5. After the Support Center creates the report, select the report to view its contents.
- 6. Click Select Accounts.

A check box appears to the left of each account listed by the report.

7. Select the accounts from the report to be upgraded to the new Agent configuration, and then click **Create Group**.

For more information about groups, see Support Center Help.

8. On the Report page menu, click **Group** and then click Change Configuration.

The Change Group Account Configuration page opens.

9. Select the new Agent configuration for the grouped accounts from the list of available Agent configurations, and then click **Save and Deploy**.

The accounts are immediately configured to use the new Agent configuration. The users' Agents are then changed to the assigned Agent configuration during the Agent synchronization portion of the next backup.

#### Use the command-line installation program

An Agent Setup file that is not directly associated with one account is available from Support Center for Agent configurations. This generic Agent Setup file lets you distribute the Agent to multiple users' computers and then install an account via the command-line.

The command-line installation method lets you use any file distribution method to create scripts or wrappers and upgrade the Agent on multiple clients, without the use of central administration. You can also use third-party file distribution software such as IBM Tivoli, CA TNG, or Microsoft SCCM.

#### To obtain the Agent Setup file to use for the Agent upgrade process

- 1. Open a Web browser, and then sign in to Support Center.
- 2. In the community where you created the Agent configuration to deploy, expand the **Configurations** node, and then expand the **PC** subnode.
- 3. Select the name of the Agent configuration to deploy.
- 4. On the View or Edit PC Agent Configuration page menu, click **Download**.

The Download Agent Setup page opens.

5. Click Download.

The Save As dialog box opens.

**NOTE:** Although this file should be saved as the default file name of AgentSetup.msi, you might have to save the file with a different name, depending on if the original Agent Setup file was distributed to users' computers with a different file name.

To verify the file name of the Agent Setup file used on a user's computer, examine the name of the Agent Setup file in the Agent Windows registry key. The key is in the following registry location, based on the Agent operating system:

32-bit: HKEY\_LOCAL\_MACHINE\SOFTWARE\Connected\Agent

64-bit: HKEY\_LOCAL\_MACHINE\SOFTWARE\Wow6432Node\Connected\Agent

6. Change the folder to the directory you want to save the Agent Setup file in, and then click **Save**.

You can now begin the Agent deployment process using the downloaded Agent Setup file.

#### Upgrade from 8.x Agents to this release

You cannot upgrade directly to this release from an Agent version 8.x earlier than 8.4. Depending on which 8.x Agent version you start with, use the tasks in this topic once or twice to upgrade to the current Agent version.

#### To use the downloaded Agent Setup file to upgrade the Agent on users' computers

Type the following command:

msiexec /qn /i path\AgentSetup.msi REINSTALLMODE=vamus REINSTALL=ALL REBOOT=R
logging

where

- path is the path name that contains the install file.
- logging is an optional attribute of the msiexec tool to enable logging for the installation attempt. It consists of the verbose logging option of the msiexec tool and a file name for the logs to be saved to in the following format:

/1\*v log\_file

where

*Log\_file* is a filename to use for saved logging.

**NOTE:** When you use the command-line installation program to install, recover, or upgrade an Agent, you must use the /qb verbosity mode on Windows 7 or later computers if UAC is enabled and set to any level other than **Never notify** 

#### Use UpdateConfiguration

The Agent installation folder of a version 8.4.x or later Agent contains the UpdateConfiguration command. This command changes the Agent configuration that the installed account uses on the Data Center. It performs the following tasks:

- Upgrades an Agent to a later version, or an Agent that uses a different language.
- Changes the Profile and Website settings, rules, or Agent settings that are applied to an account.
- Changes the Agent branding.

The UpdateConfiguration command lets you use command-line options to collect the Agent configuration, Support Center technician, and technician password that it requires. Regardless of which mode of this command you use, the following requirements exist:

• The command does not support single sign-on (SSO) credentials. You must use a technician ID that meets the following criteria:

- has native Connected Backup credentials or is mapped to an enterprise directory
- has permission to access the community in which the user's account resides
- The technician ID must have the **Change the Agent Configuration of Accounts** and **Access User's Data** permissions. Without these permissions, the tool will not update the configuration.
- The Agent configuration must be available for use in the community where the account resides.

#### To change the Agent configuration of an installed Agent

1. Open a Web browser, and then sign in to Support Center.

**NOTE:** Be sure that your technician account has the **Change the Agent Configuration of Accounts** and **Access User's Data** permissions to update the configuration in the installed agent.

For more information about how to set technician account permissions, refer to Support Center Help.

- 2. Navigate to the community that contains the Agent configuration.
- 3. In the community where you created the Agent configuration to deploy, expand the **Configurations** node, and then expand the **PC** subnode.
- 4. Select the name of the new Agent configuration to use.
- 5. On the View or Edit PC Agent Configuration page, scroll to the bottom of the page to view the Agent configuration ID to use with the UpdateConfiguration command.
- 6. To change the Agent configuration that the Agent uses on a user's computer, at the command prompt, type the following command:

updateconfiguration.exe options

For more information about how to use the UpdateConfiguration command, see Use UpdateConfiguration command-line options, below.

When you run the command, the Command Prompt window displays errors and diagnostic messages regarding the Agent configuration change. After you run the command, the Agent is immediately configured to use the new Agent configuration, and downloads the necessary files and settings to make the change without having to start or complete a backup.

#### Use UpdateConfiguration command-line options

The UpdateConfigration command uses the following syntax:

updateconfiguration.exe

(-techid | -id} technician\_ID

{-password | -pw} technician\_password

[{-configurationid | -configid} config\_ID]

[{-help | -?}]

The UpdateConfigration command has the following options:

Option	Description
{-techid   -id} <i>technician_ID</i>	<b>(Optional.)</b> Technician ID that either has native Connected Backup credentials or is mapped to an enterprise directory.
	<b>NOTE:</b> This parameter does not support IDs that use SSO credentials.
	Requires use of -password option.
{-password   -pw} technician_password	(Optional.) Password associated with the technician ID.
	<b>NOTE:</b> This parameter does not support passwords for SSO accounts.
	Requires use of -techid option.
<pre>[{-configurationid   - configid} config_ID]</pre>	(Optional.) ID of the new Agent configuration.
[{-help   -?}]	(Optional.) Displays help for the Retrieve command.

#### Examples

The following examples demonstrate the use of the UpdateConfiguration application:

#### Example 1

Update the installed Agent to use Agent configuration 152 on the Data Center by using a Support Center technician called Admin, with the password NewPass1:

updateconfiguration.exe -configid 152 -techid Admin -pw NewPass1

#### Example 2

Update the installed Agent to a new Agent configuration on the Data Center by using a Support Center technician called Admin, with the password NewPass1:

updateconfiguration.exe -techid Admin -pw NewPass1

This example is useful if you have disabled central administration, but you assigned a new Agent configuration to an account.

# Chapter 4: Remove/Uninstall

This chapter describes how to remove Agents from users' computers.

- Before you begin, below
- Removal methods, below

# Before you begin

To remove an Agent, you must have administrator privileges on the computer.

If you changed the location of the Connected EmailOptimization constituent file location for an Agent, manually remove the constituent files after you remove the Agent from a computer.

## **Removal methods**

To remove the Agent from your computer, use one of the following methods:

- Using Control Panel
- Using the Agent Installation Wizard
- Using the command-line installation program

#### **Use Control Panel**

You can use the Windows Control Panel to remove an Agent. For more information about how to use Control Panel to remove programs, see Windows Help.

Restart the computer after you remove the Agent.

#### **Use the Agent Installation Wizard**

You can use the Agent Installation Wizard to remove an Agent.

#### To do so

1. Navigate to the folder where you copied the AgentSetup.msi file.

**NOTE:** Use the same Agent Setup file that was used to install the Agent. If the original Agent Setup file is not on the computer, download from Support Center an Agent Setup file that uses the same Agent version installed on the computer.

2. Complete one of the following steps:

- Right-click AgentSetup.msi, and then select Uninstall.
- Double-click AgentSetup.msi. When prompted that the Agent is already installed, click **Yes**.

The Remove the Agent Software window opens.

3. Click Next.

The Removing Agent window opens. After the Wizard removes the Agent, the Remove Complete window opens.

- 4. To exit the program, click **Finish**.
- 5. Restart the computer.

You have removed the Agent from the computer.

#### Use the command-line installation program

#### To use the command-line installation program to remove an Agent

- 1. Open a Command Prompt window.
- 2. Change the path to the directory where you copied the AgentSetup.msi file.

**NOTE:** Use the same Agent Setup file that was used to install the Agent. If the original Agent Setup file is not on the computer, download from Support Center an Agent Setup file that uses the same Agent version installed on the computer.

3. To remove the Agent, type the following command:

msiexec /x path\AgentSetup.msi

where

*path* is the path name that contains the AgentSetup.msi file.

4. Restart the computer.

You have removed the Agent from the computer.

# **Chapter 5: Reference**

This chapter describes the parameters of the command-line applications involved with the installation, upgrade, and removal of PC Agents.

- Command-line Agent setup file parameters, below
- REGISTRATIONFILE Fields, on page 34
- Activate command, on page 36
- Agent setup transforms, on page 38
- GetSettings Command, on page 40

## **Command-line Agent setup file parameters**

In addition to the standard msiexec command-line options, you can use product-specific parameters with the Agent Setup file.

Parameter	Description
ACCOUNTUID	Specifies the single sign-on (SSO) network account user ID for the registration.
	Use: Install
	Syntax: ACCOUNTUID=value
	where value is a user name in the third-party identity provider.
	<b>NOTE:</b> Do not use this parameter with any of the following parameters:
	• EMAILADDRESS
	• LDAPID
	RESERVATIONCODE
ACCOUNTNUMBER	Directs the Agent Setup file to recover a specific account.
	Use: Recovery
	Syntax: ACCOUNTNUMBER=value
	where value is a 10-digit account number in the format nnnnn-nnnnn.
	Required parameters: Use one of the following parameter options:
	TECHID and PASSWORD

The following table describes the parameters for the Agent Setup file:

	<ul> <li>To recover a single sign-on (SSO) account in silent mode (/qn or /qb verbosity), you must use the TECHID and PASSWORD parameters with a non-SSO technician ID that has access to the user's account.</li> <li>USERPASSWORD</li> </ul>
	This parameter is not valid with SSO accounts.
	<b>NOTE:</b> Do not use this parameter with any of the following parameters:
	• ACCOUNTUID
	• COMMUNITYID
	• CONFIGURATIONID
	• EMAILADDRESS
	• FIRSTBACKUP
	• LDAPID
	RESERVATIONCODE
COMMUNITYID	Directs the Agent Setup process to use a community different from the one included in the Agent Setup file.
	Use: Install
	Syntax: COMMUNITYID=value
	where value is a valid community ID on the Data Center.
	Verify that the Agent configuration in use is active in the community specified by this parameter. If the Agent configuration is not active, the installation uses the default Agent configuration for the community.
	<b>CAUTION:</b> The Agent Setup process does not validate the community ID provided by this parameter. The installation process fails if you use an invalid community ID. If this happens, reinstall the Agent with a valid community ID.
CONFIGURATIONID	Directs the Agent Setup process to use an Agent configuration different from the one included in the Agent Setup file.
	Use: Install
	Syntax: CONFIGURATIONID=value
	where value is a valid Agent configuration ID on the Data Center.
	CAUTION: The Agent Setup process does not validate the Agent
	configuration ID provided by this parameter.

	Use: Install
	Syntax: DISKIMAGE=value
	where value is one of the following accepted values:
	no. (Default) Installs an active and registered Agent.
	serviceoff. Installs an inactive Agent on the computer that requires a user with administrator privileges to activate.
	• <b>serviceon</b> . Installs an inactive Agent on the computer that users without administrator privileges can activate.
	<b>NOTE:</b> If you use this parameter to install an inactive Agent, installation fails if you use any of these additional parameters:
	• ACCOUNTUID
	ACCOUNTNUMBER
	• EMAILADDRESS
	• FIRSTBACKUP
	• LDAPID
	• PASSWORD
	RESERVATIONCODE
	• REGISTRATIONFILE
	• TECHID
	USERPASSWORD
	<b>NOTE:</b> The installation process fails if you attempt to install an inactive Agent on a computer that already has an Agent.
EMAILADDRESS	Specifies the email address for the created account.
	Use: Install
	Syntax: EMAILADDRESS=value
	where value is a valid email address, with domain (example, user@company.com)
	Required parameter: PASSWORD
	<b>NOTE:</b> If you do not specify an e-mail address and password with an account during installation, the account is associated with the user's computer name.
FIRSTBACKUP	Specifies whether or not to run a backup after installation and registration.

	Use: Install
	030. matail
	Syntax: FIRSTBACKUP=value
	where value is one of the following accepted values:
	1. Perform a backup after installation and registration.
	• 0. (Default) Do not run a backup after installation and registration.
LDAPID	Specifies the enterprise directory user ID for the registration.
	Use: Install
	Syntax: LDAPID=value
	where value is a user name in the enterprise directory.
	You can use system variables with this parameter (example, %username%), but not registry variables.
	<b>NOTE:</b> Do not use this parameter with any of the following parameters:
	ACCOUNTUID
	• EMAILADDRESS
	RESERVATIONCODE
MAKESHORCUT	Directs the Agent Setup process to create a Desktop shortcut.
	Use: Install
	Syntax: MAKESHORTCUT=value
	where value is one of the following accepted values:
	• 1. (Default) Create a Desktop shortcut.
	0. Do not create a Desktop shortcut.
PASSWORD	Specifies the password for the created account.
	Use: Install
	Syntax: PASSWORD=value
	where value is a valid account password.
	Required parameter: EMAILADDRESS
	<b>NOTE:</b> A valid account password consists of six to 100 alphanumeric characters and at least one character that differs from the other characters.
	<b>NOTE:</b> If the created account is in either an enterprise directory or single-sign on community, this parameter is ignored by the Agent Setup process.

PASSWORDSpecifies the password of the technician ID to use for an account recovery. Use: Recovery Syntax: PASSWORD=value where value is the valid technician password for the technician account you are using for the account recovery. Required parameters: ACCOUNTNUMBER and TECHIDREGISTRATIONFILE VIEWDirects the Agent Setup process to send user registration information in an XML file to the Data Center during the installation process. NOTE: This parameter does not support XML files for accounts that are mapped to an enterprise directory or use single sign-on credentials.Use: Install Syntax: REGISTRATIONFILE verter value is the location and name of an XML file that contains account registration information. NOTE: If the XML file does not exist in the location provided by this parameter, the Agent installation process will complete, but with no user information fields populated.RESERVATIONCODE Les: Install Syntax: RESERVATIONCODE= value where value is a valid account reservation code from Support Center.TARGETDIRSpecifies an account reservation code form Support Center.TARGETDIRSpecifies a different path in the Program Files folder to install the Agent. Use: Install Syntax: TAGETDIR=value where value is the complete path of the new installation folder, including drive letter.TECHIDSpecifies the technician ID to use for an account recovery. Use: Recovery Syntax: TECHID=value where value is a technician account that exists in the account's community.		
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Syntax: TECHID=value where value is a technician account that exists in the account's	TECHID	Specifies the technician ID to use for an account recovery.
where value is a technician account that exists in the account's		Use: Recovery
		Syntax: TECHID=value

	Required parameters: ACCOUNTNUMBER and PASSWORD
	<b>NOTE:</b> To recover an SSO account in silent mode (/qn or /qb verbosity), this parameter requires a non-SSO technician ID.
	<b>NOTE:</b> The technician ID requires the <b>Access Users' Data</b> permission in the account's community to work with this parameter.
USERPASSWORD	Specifies the user's account password to use for an account recovery. Use: Recovery Syntax: USERPASSWORD=value
	where value is a valid account password. Required parameter: ACCOUNTNUMBER

# **REGISTRATIONFILE Fields**

When you use the REGISTRATIONFILE parameter with the command-line installation, you instruct the Agent Setup process to read an XML file that contains registration field values for an account. These values are then associated with the new account by the Agent Setup process immediately after installation.

**NOTE:** The REGISTRATIONFILE parameter does not support XML files for accounts that are mapped to an enterprise directory or use single sign-on credentials.

When you create an XML file for the registration information, be sure you include all of the available fields in the file. Values that do not have a value can be left blank between the opening and closing field tag.

The registration XML file cannot set field states, such as hidden, read-only or required. You must set states in the **Profile and Website Settings** page in Support Center.

Field name	Description
FIRSTNAME	Maximum character length = 32
MIDDLENAME	Maximum character length = 16
LASTNAME	Maximum character length = 64
COUNTRY	Maximum character length = 32
ADDRESS1	Maximum character length = 40
ADDRESS2	Maximum character length = 40
ADDRESS3	Maximum character length = 40

The following table describes the fields within the REGISTRATIONFILE XML file:

Field name	Description
CITY	Maximum character length = 40
STATE	Maximum character length = 40
	This field connects to a localized field on the Account Management Website based on the locale it is installed in. The following list includes the localized field connections:
	Canada: Province
	France: Region
	Germany: Region
	Japan: Prefecture
	UK: County
	U.S.: State
	All other countries: Region
POSTALCODE	Maximum character length = 11
EMAIL	Maximum character length = 100
	If you use both this field and the EMAILADDRESS parameter, the installation ignores the value in EMAILADDRESS, and uses the value in this field.
COMPANY	Maximum character length = 64
DEPARTMENT	Maximum character length = 64
LOCATION	Maximum character length = 32
MAILSTOP	Maximum character length = 16
COSTCENTER	Maximum character length = 16
EMPLOYEEID	Maximum character length = 16
PHONE	Maximum character length = 32
EXTENSION	Maximum character length = 16
CUSTOM	Maximum character length = 255

**NOTE:** You must use uppercase for the field names in the XML file that contains the registration information.

If any field values exceed the maximum character length for a field in the XML file, the installation generates error messages only in the Data Center DCMaint logs. In addition, the Agent Setup file does not display them in the command prompt window.

Enclose each registration field value in a CDATA section to ensure that the parser interprets values as character data, and not XML markup. If you leave out the CDATA section, the XML file incorrectly parses any special characters, such as "<" and "&" in the registration field values.

The Agent reads the XML information immediately after installation or account recovery, and then encrypts and sends the information to the Data Center. If you change the content of the registration XML file after installation, the Agent does not send updated registration fields to the Data Center.

#### Sample XML file content

```
<REGISTRATIONFIELDS>
<FIRSTNAME><![CDATA[John]]></FIRSTNAME>
<MIDDLENAME></MIDDLENAME>
<LASTNAME><![CDATA[Smith]]></LASTNAME>
<COUNTRY></COUNTRY>
<ADDRESS1></ADDRESS1>
<ADDRESS2></ADDRESS2>
<ADDRESS3></ADDRESS3>
<CITY></CITY>
<STATE></STATE>
<POSTALCODE></POSTALCODE>
<EMAIL></EMAIL>
<COMPANY></COMPANY>
<DEPARTMENT></DEPARTMENT>
<LOCATION></LOCATION>
<MAILSTOP></MAILSTOP>
<COSTCENTER></COSTCENTER>
<EMPLOYEEID></EMPLOYEEID>
<PHONE></PHONE>
<EXTENSION></EXTENSION>
<CUSTOM><![CDATA[ASSETNUM324]]></CUSTOM>
</REGISTRATIONFIELDS>
```

# Activate command

The Activate command registers or activates an inactive Connected Backup Agent account. It uses the following command-line syntax:

```
activate.exe
[ [ -accountuid accountUID | -ldapid ldapID | -rescode
    reservationcode ] [-firstbackup ] |
    [ -account account# -password password [ -techid techid ]
]
[ -registernow ]
[ -createdesktopshortcut ]
[ -help]
```

Option	Description
[ -accountuid <i>accountUID</i>   - ldapid <i>LdapID</i>  - rescode	(Optional) Specifies the user ID or reservation code to use for Agent registration.
reservationcode ]	You can specify one of the following options:
	<ul> <li>-accountuid accountUID</li> </ul>
	Specifies the single sign-on user ID for the Agent registration.
	• -ldapid <i>LdapID</i>
	Specifies the enterprise directory user ID for the Agent registration.
	<ul> <li>-rescode reservationcode</li> </ul>
	Specifies the reservation code required by the Data Center for the Agent registration.
	The Data Center requires this parameter only if the community that the Agent is configured to use requires account reservation. For more information about account reservation, see Support Center Help.
<pre>[ -account account# - password password [ -techid techid ] ]</pre>	(Optional) Specifies the account to use for account recovery with an inactive Agent.
	You can specify following options:
	<ul> <li>-account account#</li> </ul>
	Specifies the account number to recover.
	<ul> <li>-password password</li> </ul>
	Specifies the password of the technician who recovers the account, if the -techid option is also used. Otherwise, it specifies the password of the user who owns the account.
	<b>NOTE:</b> This option does not support SSO account passwords.
	• -techid techid
	Specifies the technician ID to use for account recovery.
	<b>NOTE:</b> This option does not support SSO technician IDs. To recover an SSO account, use a technician ID with native account credentials.

	Required options: -account and -password. To recover an SSO account, the -techid option is also required.
[ -firstbackup ]	Starts a backup after Agent registration.
	This option is valid only for account registration, not account recovery.
[ -registernow ]	(Optional) Directs the Activate command to immediately start the Agent service, run the Agent Startup Wizard, register the account, and then start the Agent.
	Whether the Agent Startup Wizard runs depends on the following:
	• For native accounts, the Wizard runs only if you used Support Center to enable the Agent Startup Wizard for the Agent configuration. Otherwise, the Agent registers immediately and anonymously.
	<ul> <li>For accounts mapped to an enterprise directory or single sign-on account, the Wizard runs only if you do not also specify the -ldapid or -accountuid parameter, respectively. Otherwise, if you did specify one of these parameters, the Agent registers immediately with the ID provided by the -ldapid or -accountuid parameter.</li> </ul>
	If you do not specify the -registernow option, the account registers after you restart the computer.
-createdesktopshorcut	(Optional) Directs the Activate command to create a desktop shortcut to the Agent.
-help	(Optional) Displays help for the Activate command.

# Agent setup transforms

You can use transforms instead of the Agent command-line interface to set the parameters in the Agent Setup file. The following table describes the Agent parameters that you can use your transform tool to specify:

Parameter	Description
ACCOUNTUID	Specifies the single sign-on user ID for the registration.
	Default value: 0
	Applies to: new Agent installs
COMMUNITYID	Directs the Agent Setup process to use a community different from the one included in the Agent Setup file.

Parameter	Description
	Default value: 0
	Applies to: new Agent installs, disk image pre-installs
CONFIGURATIONID	Directs the Agent Setup process to use an Agent configuration different from the one included in the Agent Setup file.
	Default value: 0
	Applies to: new Agent installs, disk image pre-installs, account recoveries
FIRSTBACKUP	Specifies whether or not to run a backup after installation and registration.
	Default value: Undefined
	Applies to: new Agent installs
	<b>NOTE:</b> To use this parameter in a transform, you must add FIRSTBACKUP to the transform property list.
	Values:
	• 1. Perform a backup after installation and registration
	• <b>0</b> . Do not run a backup after installation and registration.
LDAPID	Specifies the enterprise directory user ID for the registration.
	Default value: 0
	Applies to: new Agent installs
MAKESHORTCUT	Directs the Agent Setup process to create a Desktop shortcut.
	Default value: 1
	Applies to: new Agent installs, disk image pre-installs, account recoveries
	Values:
	O. Do not create a Desktop shortcut
	1. Create a Desktop shortcut
REGISTRATIONFILE	Directs the Agent Setup process to send user information in an XML file to the Data Center during the installation process.
	Default value: 0
	Applies to: new Agent installs, account recoveries
TARGETDIR	Specifies a different path in the Program Files folder to install the Agent.
	Default value: Undefined
	Applies to: new Agent installs, disk image pre-installs, account recoveries
	NOTE: To use this parameter in a transform, you must add TARGETDIR

Parameter	Description
	to the transform property list. Do not use the default value found in the MSI.

# **GetSettings Command**

The GetSettings command displays the Agent configuration ID and community ID for an installed Agent.

The GetSettings command uses the following command-line syntax:

```
getsettings.exe
```

```
[{-fileset | -f}]
[{-brief | -b}]
[{-registration | -r}]
[{-config | -c}]
[{-accountnum | -a}]
[{-lastbackup | -l}]
[{-xml | -x}]
[{-help | -?}]
```

The following table describes the command-line options for the GetSettings command:

Option	Description
[{-accountnum   - a}]	(Optional) Displays Agent's 9-digit account number.
[{-brief   -b}]	(Optional) Abbreviates displayed output.
<pre>[{-config   -c}]</pre>	(Optional) Displays Agent configuration ID and community ID for Agent.
[{-fileset   -f}]	(Optional) Displays Agent's version and language.
[{-lastbackup   - l}]	(Optional) Displays time and status of last backup of Agent.
	<b>NOTE:</b> You will receive error messages if you have not backed up this account.
[{-registration   -r}]	(Optional) Displays user registration information for the Agent on the current computer.
[{-xml   -x}]	(Optional) Converts the displayed output to XML format.
[{-help   -?}]	(Optional) Displays help for the GetSettings command.

#### Examples

The following examples demonstrate the use of the GetSettings command:

#### Example 1

Display the account number, Agent configuration ID, and community ID of the Agent:

getsettings.exe -a -c

Output:

Account Number = XXXXXXXXX Community = YY Configuration = ZZ

#### Example 2

Display the account number and version and language of the Agent, in brief format:

```
getsettings.exe -a -f -brief
```

Output:

XXXXXXXXX, English 8.4.0.2

#### Example 3

Display the Agent configuration ID and community ID of the Agent, in XML format:

```
getsettings.exe -c -xml
```

Output:

```
<RegistrationInfo>
<Community>2129</Community>
<Configuration>10955</Configuration>
</RegistrationInfo>
```

# Appendix A: Sample user instructions

This appendix contains an example of information that you can provide to users if you want them to register an account and install the Agent. You can copy and modify the text in this template to communicate instructions to users.

• Register an account and install an Agent, below

# Register an account and install an Agent

Your company uses Connected Backup software to back up and protect data. To protect the files on your computer, you must register a backup account and install the Connected Backup Agent software on your computer. To do so, you must complete the following procedures:

- 1. Register your backup account
- 2. Install an Agent on your computer
- 3. Open your Agent for the first time after installation
- 4. Start your first backup

This document tells you how to complete each procedure.

#### Step 1: Register your backup account

- 1. Go to Account Management Website (AMWS) in one of the following ways:
  - Click the link in the e-mail message that your system administrator sent to you.
  - Open a web browser, and then enter the URL that your system administrator sent to you. The **Welcome** page opens.

#### 2. Click Register and Download.

If your account requires acceptance of the Service License Agreement, AMWS displays it.

3. To accept the Service License Agreement, if required, click Accept.

If you click **Decline**, the registration process stops and you cannot download the Agent Setup file.

- 4. If the system prompts you for one of the following pieces of information, provide the required information:
  - **Reservation account code**. Enter the code that you received from your system administrator, and then click **Continue**.
  - Network Logon ID. Enter the network logon ID (or user name) and password, and then

click Continue.

- Single sign-on account credentials. Provide the requested information to sign in.
- 5. If the **Registration** page appears, enter the required information, and then click **Continue**.

If you register two different Agents, the information on this page might change, depending on the Agent configuration.

**NOTE:** Passwords for native Connected Backup accounts must meet the following requirements:

- contain a minimum of six alphanumeric characters
- contain a maximum of 100 alphanumeric characters
- contain at least one character that is different from the other characters

Remember the e-mail address and password that you enter during this step. You need this information to sign in to AMWS to finish the Agent installation and manage the account.

**IMPORTANT:** For security reasons, do not write down your password. When you create a password, create one that is easy for you to remember, but difficult for someone else to guess.

If the registration completes successfully, AMWS displays the **Registration Complete** page. This page displays the following information for your account:

- account number
- one of the following:
  - account user name and e-mail address, if you have a native Connected Backup account or one mapped to an enterprise directory

If you have a native Connected Backup account, you can change this information at a later time by using AMWS to update your profile. However, to change this information if your account maps to an enterprise directory, you must contact your system administrator or update the values in the enterprise directory.

• user ID, if you have a Connected Backup account that maps to a single sign-on account

If the registration fails, AMWS displays an error message that explains why the registration did not complete.

6. Print the information on the **Registration Complete** page, and then store it in a secure location.

You need this information to sign in to AMWS and manage your account online.

7. Click Download Software.

While AMWS waits for the Data Center to create the Agent Setup application for your account, it displays the **Creating Your Download** page. When the file that contains this application is ready to download, AMWS displays the **Download Instructions** page.

8. When the Download Instructions page opens, read the instructions, and then click **Begin Download**.

The File Download dialog box opens.

- 9. Complete one of the following steps:
  - To save the Agent Setup file to your computer, click **Save**.
  - To run the Agent Setup program, click **Run**.
- 10. Continue to the next procedure, Step 2: Install an Agent on your computer, below.

#### Step 2: Install an Agent on your computer

- 1. Complete one of the following steps:
  - If, in the File Download dialog box, you saved the Agent Setup file to your computer, navigate to the Agent Setup file (AgentSetup.msi) and then double-click it.
  - If, in the File Download dialog box, you clicked **Run**, continue to the next step.
- 2. In the Welcome screen, click Next.

The Application License dialog box opens.

3. Accept the license agreement, and then click Next.

The Installation Options dialog box opens.

4. Accept the default installation location or browse to another location, and then click Next.

The Installing Agent screen opens. This screen informs you about the progress of the installation. When the installation is complete, the Installation Complete screen opens.

- 5. To complete the installation, click **Finish**.
- 6. To open the Agent after you install it, continue to the next procedure, Step 3: Open the Agent for the first time after installation, below.

#### Step 3: Open the Agent for the first time after installation

After you install the Agent, the Agent opens automatically, and prompts you for your account credentials.

- 1. Depending on the type of credentials your Agent configuration requires, either:
  - In the Enter Password dialog box, enter your account password.
  - In the browser that opens, enter your Single Sign-On credentials.
- 2. Click OK.

You receive a message as the Agent synchronizes your account with the Data Center. After the Agent synchronizes with the Data Center, the Welcome to the Agent window opens.

3. For information about how to use the Agent for the first time and how to perform your first backup, click **Help**.

You can print the Help topic for reference.

4. Close the Help topic, and then click **Close**.

The Welcome to the Agent window closes.

The Backup Set tab opens and the Agent compiles your backup set. A Scanning message opens at the lower, left of this tab during that process.

After the Agent compiles your backup set, the application displays the total number of files in the backup set and the total number of files scanned at the bottom of the Backup Set tab.

#### Step 4: Start your first backup

To start your first backup, click **Backup Now**.

You receive a backing up message. The first backup can take several hours to complete, depending on the number of files in your backup set and the speed of the network connection. Subsequent backups are smaller and faster because the Agent backs up only new files and changes to previously backed-up files.

You can close the Agent while a backup is in progress. You can view the results of the backup by reopening the Agent and viewing the Summary or History tab.

# Index

### A

Account Management Website defined 7 installation 7 recovery 17 account recovery defined 16 requirements 16 **ACCOUNTNUMBER 29** ACCOUNTUID 29 activate options 37 parameters 36 Agent system permissions 6, 16 system requirements 6, 16 Agent configuration 6 Agent Installation Wizard Agent removal 27 Agent Startup Wizard defined 17 allow computer name change 16

#### С

central administration 21 Agent upgrade from 8.x 21 command-line installation program Agent installation 9 Agent recovery 19 Agent removal 28 Agent upgrade from 8.x 24 defined 9 installation examples 10 recovery examples 20 COMMUNITYID 30 CONFIGURATIONID 30

#### D

disk image installation Agent Installation Wizard 12 command-line installation program 12 recovery 18 DISKIMAGE 30

#### Е

**EMAILADDRESS 31** 

#### F

field states 34 FIRSTBACKUP 31

#### G

getsettings defined 40 examples 41 options 40

#### L

Language Support 14 LDAPID 32

#### Μ

MAKESHORCUT 32

#### Ρ

PASSWORD 32

#### R

REGISTRATIONFILE 33 defined 34 examples 36 fields 34 removal methods 27 RESERVATIONCODE 33

### S

setup transforms 38

#### Т

TARGETDIR 33 TECHID 33

#### U

uninstall 27 updateconfiguration 24 defined 24 examples 26 location 24 upgrade scenarios 21 USERPASSWORD 34

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We appreciate your feedback!