BACKUP AS A SERVICE (BAAS) - SERVICE GUIDE V2

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1 OVERVIEW

InterVision Backup as a Service (BaaS) is a managed data protection service for your data regardless of where it is located – your data center, in a branch office or the Cloud. This enterprise-class backup and replication service provides you with the assurance that recovery of your sensitive and critical data is without hassle with the assistance of our InterVision team of data protection and disaster recovery experts.

With flexible options of ways that the service can be rolled out, Backup as a Service provides the necessary equipment, software, and know-how to provide a managed solution that may include an on-premise backup target, InterVision cloud storage target or a combination of both.

The InterVision BaaS service enables customers to follow industry best practices of "The 3-2-1 Rule".

The Service enables you to create 3 copies of your data (primary and two backup copies), store 2 copies of backup data stored on different storage media infrastructure and to keep at least 1 backup copy of your offsite.

The InterVision service will assist you with the development of your backup and replication plans including backup schedule, frequency, retention, and replication policies to meet your business needs. The team then works with you to implement the solution, verify it is functioning efficiently, and to ensure it runs reliably. Our goal is to execute reliably at an efficiency rate above industry averages.

1.1 ADDITIONAL BEST PRACTICES

InterVision recommends backing up at least one copy of your data to an immutable repository for cyber resiliency. Immutable backups are safe from potential changes and can only be deleted after a set time period has expired.

If your data protection requirements include periodic testing and validation, we can also assist with that, too. Our flexible options include assisting with everything from a file recovery test to a full disaster recovery test to the InterVision IaaS environment. And when it comes to actual recovery, our Backup and Replication experts are here for you to help with file or data restores.

2 USE CASES

InterVision BaaS supports the use cases below.

Backup Use Cases:

1. Backup of on-premises systems to an on-premises backup server. InterVision provides and manages the dedicated backup server as well as the backup operations.

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2. Backup of on-premises systems with an offsite copy to the InterVision backup environment in one of our secure data centers. InterVision provides and manages the hosted backup infrastructure in our data center as well as the backup operations.
3. Backup of on-premises systems with an offsite copy to manage cloud environments, such as AWS/Azure. InterVision provides and manages the public cloud backup infrastructure as well as the backup operations.
4. Backup of on-premises systems with an offsite copy to a compatible client-owned backup repository such as Wasabi or Backblaze. InterVision provides and manages the backup application as well as the backup operations.
5. Backup of the on-premises systems with an offsite copy to a secondary customer location. InterVision provides and manages the backup application as well as the backup operations.
6. Backup of O365 and Entra ID data with offsite storage.
7. Backup of cloud based systems with air-gapped credentials and offsite backup to secondary account subscription. InterVision provides and manages the backup application as well as backup operations.

Replication Use Cases:

1. Replication from the on-premises backup server to our data center. InterVision provides the infrastructure and manages backup operations
2. Replication from InterVision cloud-hosted BaaS infrastructure to a secondary InterVision data center.
3. Replication of the on-premises system to secondary customer location. InterVision provides and manages the backup infrastructure as well as the backup operations.

You can roll out any one of these use cases or a combination of each of them depending upon your environment requirements and business needs.

3 SERVICE DESCRIPTION

InterVision's Backup as a Service (BaaS) is a managed service and provides the software, infrastructure, and people necessary for worry-free backup and replication services. The service includes enterprise-grade backup and replication software, storage and infrastructure to enable the storing of your backups and replication on a local appliance and to secure, geographically diverse, datacenters. Customers also receive assistance with day-to-day operations, data recovery and system restoration as defined in this service guide. The service can be consumed on a utility basis with almost immediate scalability.

The protected data may be data files, databases, emails, ERP or machine-state information (Operating Systems, Virtual Machine metadata, etc.). The InterVision service team will implement a solution aligned with your business needs, our experts assist with solution design, data retention policies, scheduling policies, configuration, performance tuning, and data seeding to get you up and running quickly with a high level of efficiency.

The BaaS service offers the following features and options to optimize your backup and replication environment:

- Scheduled and on-demand backups, replication, and archiving
- Customized backup and replication scheduling
- Customized retention policies
- On-demand file retrieval and data restore*
- Event notification (see monitoring section)
- Periodic job status reviews by the backup administrator(s)
- Reporting – job reporting, network & resource readiness, and other standard reports (see reporting section)
- Client BaaS Portal to view backup and replication jobs, policies, health information, and some self-service capabilities
- Customer support via the InterVision Operations Center 24/7/365.

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- Ongoing monitoring, configuration, and troubleshooting of jobs performed by our knowledgeable OpsCenter staff
- Software updates for client and backup servers
- Up to 5-hours of labor per month for service request and changes
- Enterprise-class backup and replication system and software enabling the following:
    - Deduplication of data
    - Compression of data
- Application-aware processing: File, Systems, VMs, Database, Email & Collaboration, ERP, Endpoints
- Reduction in stored data capacity and network traffic
- Data encryption for data at rest **
- Data encryption for data in transit **
- Long term archival to cloud **
- See service priority definitions.

** Optional

4 SERVICE DETAILS

4.1 CLIENT BACKUP SERVER

InterVision will provide and configure backup infrastructure for on-premises deployment. The backup infrastructure is remotely managed and administered by the InterVision Operations team.

We provide the following:

- Device monitoring – availability, performance and health
- Remote device and software administration
- Maintenance of system drivers, OS, and backup and replication software

4.2 CLIENT PHYSICAL SERVER AGENT

InterVision will provide backup agents for the physical servers and systems that you would like protected. InterVision will provide the agent which is deployed through the backup and replication server, or may be installed manually by the client.

Backup agent OS and Application compatibility is available here[1] for Veeam and here[2] for Commvault.

4.3 FILE & SYSTEM RECOVERY

InterVision Operations will assist with file or system recovery to a client-provided system. This is included within the terms of the service and requests will be prioritized based upon the severity of the event. See the "priority levels" section.

InterVision is responsible for initiating the file or system recovery and monitoring the restoration through completion. The client is responsible for all target system configurations, testing, and validation of a successful recovery.

1 https://helpcenter.veeam.com/docs/agentforwindows/userguide/system_requirements.html?ver=30
2 http://documentation.commvault.com/commvault/v11/article?p=system_requirements/common/requirements_overview.htm

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4.4 FILE & SYSTEM RECOVERY TESTING

InterVision Operations will assist with backup and replication testing by providing file or system recovery assistance to a client-provided system. This is included within the terms of the service. Documentation and testing plans are the responsibility of the client unless DRaaS services are included in the solution.

4.5 DISASTER RECOVERY TESTING

Through the additional InterVision DRaaS service, we can assist with disaster recovery testing by providing system recovery assistance to the client-provided systems or reserved IaaS resources.

See DRaaS Service Specification[3] for complete and definitive details.

4.6 BACKUP AND REPLICATION POLICY REVIEW

InterVision Backup and Replication Policy Review service can be added as an additional service to audit and identify ways to optimize your backup environment. The service includes:

- Documentation of existing client policies, schedules, and retention as implemented in the InterVision Backup and Replication Service
- Document the inventory of backups and replication jobs
- Document the size of the backup and replication storage by the client system

With our InterVision data protection experts, we identify opportunities for service optimization and improved data protection.

4.7 BAAS SERVICE PORTAL

InterVision will provide access to the BaaS service web portal. This portal offers the following:

- See protected systems
- See job status and history
- Review client system details – content, schedule, retention and backup and replication sizes
- Initiate self-service restores

Access to the portal will be granted during the onboarding process.

4.8 LONG TERM ARCHIVAL

InterVision will provide setup and account management for cloud archive storage as well as unified billing of cloud charges.

5 ROLES & RESPONSIBILITY MATRIX

	Client	InterVision BaaS	Extended Services*

3 https://intervision.sharepoint.com/:b:/r/sites/Products/Shared%20Documents/Service%20Guides/Managed-Resiliency/DRaaS-Service-Guide-v2.pdf?csf=1&web=1&e=xnY9Lp

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General			
Server and Application information (account, password, location, etc.)	X		
Backup and Replication job scheduling	X		
Backup and Replication retention scheduling	X		
Client escalation information	X		
Installation and Configuration			
Determine the data to be backed up and/or replicated	X		X
Determine retention, destruction and encryption needs	X		X
Backup server configuration		X	
Install Backup agents on physical servers	X	X	
Create Backup and Replication Jobs		X	
Create Retention schedule		X	
Physical implementation of backup server at client location	X		X
Public cloud archive storage		X	
Public cloud account management		X	
Purchase and provide access to compatible 3rd party backup repository	X		
Configure compatible 3rd party backup repository		X	
Configure backup jobs to utilize compatible client-owned 3rd party repository		X	
Monitoring			

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Monitoring of backup and replication jobs		X	
Monitoring of Veeam Backup and Replication (VBR) server		X	
Monitoring of managed backup repository capacity (Requires VeeamOne)		X	
Monitoring of compatible client-owned components	X		X
Incident and Problem Management			
Event notification		X	
Restart failed jobs per client requirements		X	
Restore backup data to customer systems or storage		X	
Remediate source server-level issues	X		
Provide the restore information including system details, folder path and/or file, file overwrites, etc.	X		
Integrate restored data into applications	X		X
Bare metal restores (customer infrastructure)	X	X	
Remote maintenance and updates of backup and replication server		X	
On-premises maintenance or updates to the backup and replication server	X		
Managed cloud archive storage availability issue escalation		X	
Break-fix ownership of the compatible client-owned repository	X		
Patch Management			

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Software Updates		X	
Hosted backup and replication infrastructure – Software, Storage, Network		X	
Administer SW feature releases and non-critical updates		X	
Management			
Provide customer requirements (maintenance windows, reboot schedules, etc.)	X		
Administer user access to the portal	X	X	
Customer change management and notification	X		
Notification of backup and replication infrastructure maintenance events		X	
Administer access to public cloud archive storage		X	
Reporting			
Standard operations reports		X	
Custom operations reports (requires VeeamOne)			X
Administer advanced backup reports (requires VeeamOne)		X	
Backup and Replication Policy Management – Post Implementation			
Backup and replication policy review (per client request)			X
Backup and replication policy redesign			X

Full troubleshooting may require Managed Network and Server Service support of all upstream network and infrastructure server components. Please refer to Managed Network and Server Service Descriptions for additional information.

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- Extended Services are services that may be provided at a cost incremental to the InterVision BaaS monthly recurring fees.

**Configuration and design offer many flexible options, any and all managed BaaS solutions must follow vendor best practices, recommendations, sizing guidelines, and requirements to be supported.

6 MONITORING

The managed backup service will monitor the following:

Monitor	Alert Threshold	Severity Level
Backup and Replication Server DB store corrupted	Upon detection	6
Backup and/or replication job exceeded run time of 24 hours	Upon detection	6
Backup and/or replication server failed or skipped	Upon detection	6
Job failed or completed with warnings	Upon detection	6
Repository disk space low *(requires VeeamOne)*	Upon detection	6
DB maintenance failed or succeeded with errors	Upon detection	6
Possible Ransomware Detected *(requires VeeamOne)*	Upon detection	8

Enhanced Veeam monitoring capabilities are available here[4].

Severity level 10 & 9 = Priority 1 response
Severity level 8 & 7 = Priority 2 response
Severity level 6 & 5 = Priority 3 response
Severity level 4 & 3 = Notification Only
Severity level 2 & 1 = No notification. Event stored in monitoring platform for reporting purposes.

7 REPORTING

The BaaS managed service will provide the following reports.

Reports	Report Frequency
Job Summary (completed jobs, failed jobs, etc.)	Daily
Reporting the backup application size for clients and VMs. Includes First and Last (Full and Incremental) backups over 30-days.	Quarterly

4 https://helpcenter.veeam.com/docs/one/reporter/veeam_br_monitoring.html?ver=95u4

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Schedule Policy Audit and Data Retention.	Quarterly
Usage vs contracted	Provided upon request

Enhanced Veeam reporting capabilities are available:

VeeamOne Reports[5]

Enterprise Manager Report[6]

These reports will be set up during onboarding and will be sent to the client-specified contact or group distribution list. InterVision has defined a reporting frequency, but this can be modified upon client request.

8 SERVICE ACTIVATION

InterVision employs a structured onboarding process to help ensure a smooth transition to Backup as a Service.

Our Project Management Office (PMO) owns the process with the Onboarding Engineer (OE), holding the ultimate responsibility and serving as the single point of contact (SPOC).

Common steps to service activation:

1. Data gathering
2. Customer service manual
3. BaaS order form
4. Install and configure backup and replication servers
5. Install and configure client backup agents on physical servers
6. Perform data seeding
7. Create backup and replication policies - schedule and retention
8. Performance tuning
9. Initiate BaaS portal access
10. Initiate reporting and monitoring
11. Communicate onboarding issues with the client to review
12. Complete onboarding
13. Complete training on BaaS portals
14. Go live with the operations center (OC)

9 SERVICE DELIVERY

Backup as a Service-Specific Priority Levels

Request for a System Restore will be treated as a "critical" Priority 1. For a system restore we will respond and our objective is to initiate the restoration in one hour or less. Our InterVision team will need all relevant information to initiate restore which includes the system information, folder path and/or file identification, if you would like the restore to overwrite or not, etc.

Request for a Folder or File Restore will be treated as a Priority 2 unless otherwise specified by the client. For a Folder or File restore, we will respond and our objective is to initiate the restoration in four hours or less. Our InterVision team will need all relevant information to initiate restore which includes system information, folder path and/or file identification, if you would like the restore to overwrite or not, etc.

On-demand backup requests will be treated as a Priority 2.

5 https://helpcenter.veeam.com/docs/one/reporter/predefined_reports.html?ver=120
6 https://helpcenter.veeam.com/docs/backup/em/reports_on_backup_servers.html?ver=120

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10 TERMS AND CONDITIONS

Refer to MSA and Work Order and Service Order for additional terms.

10.1 CUSTOMER REQUIREMENTS:

- The customer agrees, as reasonably requested by InterVision, to provide InterVision with access to the Customer's premises and equipment and to otherwise cooperate with InterVision in performing the services.
- The customer agrees to install the necessary software to enable backup operations, monitoring, and reporting. If contracted separately, the customer agrees to allow InterVision to install the necessary software to enable backup operations, monitoring, and reporting.
- The customer agrees to notify InterVision of any changes in the Customer hardware, including any system configuration changes or any hardware or software upgrades, which may affect the services provided hereunder.
- Ensure that the proper operating environments are deployed.

10.2 CHANGE MANAGEMENT

The Customer is provided at least seventy-two (72) hours prior written notice of any changes made by InterVision that affect the Services, other than regularly scheduled maintenance outages. However, if a shorter notification period is required, due to an urgent or emergency situation, changes can be made without the agreement of the Customer, as deemed necessary on a case-by-case basis. InterVision strives to minimize outages that may be caused by a change. If an outage is required, the InterVision will use reasonable efforts to minimize the impact of the change and schedule the outage based upon the Customer's and InterVision's requirements. If an outage is required, such outage will be considered a scheduled outage. InterVision will use reasonable efforts to minimize the impact of the change on the affected service. InterVision reserves the right, however, to proceed with any change if InterVision determines that the change is necessary. InterVision will take reasonable steps to minimize any harm to the Customer's specific environment as a result of such change.

The customer is required to provide notification to the InterVision Operation Center at least seventy-two (72) hours before making any changes to its configuration that interface with the Services.

11 SERVICE ITEMS

The following items are available:

BaaS LICENSES	
SKUs	**Description**
BaaS -Backup & Replication - Ent Plus for VM or Server (Does NOT include VeeamONE)	License per VMware/Hyper-V VM or physical server. Managed Server services must be added separately and is required for Veeam Architecture. Server must meet required minimum specifications per the Service Guide
BaaS -Backup & Replication - Ent Plus for Cloud VM (Does NOT include VeeamONE)	License per Cloud VM. Managed Server services must be added separately and is required for Veeam Architecture.

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BaaS LICENSES	
	Server must meet required minimum specifications per the Service Guide
BaaS - VeeamONE - for VM, Cloud VM, or Server	License per monitored machine. Managed Server services must be added separately. Not required for basic Veeam Architecture monitoring. Server must meet required minimum specifications per the Service Guide
BaaS - Veeam Cloud Connect - Off Site BU Lic (VeeamONE N/A)	License per VM or physical server. Managed Server services must be added separately and is required for Veeam Architecture. Server must meet required minimum specifications per the Service Guide
BaaS - Veeam Cloud Connect - Off Site REP Lic (VeeamONE N/A)	License per VMware/Hyper-V VM. Managed Server services must be added separately and is required for Veeam Architecture. Server must meet required minimum specifications per the Service Guide
Backup as a Service for M365	License per Seat. Managed Keepit Backup as a Service provides retention for up to 10 years and can backup data every 24 hours or Every 12 hours based on customer need.
Backup as a Service for Entra ID Advanced	License per Seat. Managed Keepit Backup as a Service provides retention for up to 10 years and can backup data every 24 hours or Every 12 hours based on customer need.
BaaS - File Share License (per 500GB)	License per 500GB, QTY 1
BaaS - Commvault License per device	Minimum 30 Devices unless Add-on
BaaS for MANAGEMENT	
SKUs	**Description**
BaaS - Managed Support for Veeam Server	Managed Support for Veeam Server. Includes OS, Hardware, and Backup Software
BaaS - Veeam Support for Secondary Managed Server	Managed server service for secondary devices such as proxies, repositories, and other secondary server architecture required for a BaaS solution being managed by a centralized VBR server

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BaaS - Veeam - Managed Protected Instance (VM or Physical)	Management Fee, charged per VM or Physical server, 25 unit minimum unless Add-on
Backup as a Service for M365	Backup as a Service management fee for M365
Backup as a Service for Entra ID Advanced	Backup as a Service management fee for Entra ID Advanced
BaaS - File Share Managed Service (per 500GB)	Managed Support for Veeam Server. Includes OS, Hardware, and Backup Software. NOTE: QTY 1 per 500GB
BaaS - Commvault Managed Service per device	Minimum 30 Devices unless Add-on
BaaS - Managed Support for Media Agent	Per Media agent installed on Client Prem
BaaS - Commvault Support for Secondary Managed Server	Managed server service for secondary devices such as proxies, repositories, and other secondary server architecture required for a BaaS solution being managed by a centralized Media Agent server
Managed BaaS Support for Media Agent License up to 1TB	Appliance not included
Managed BaaS Support for Media Agent License Add to 1TB	Appliance not included

BACKUP STORAGE	
SKUs	**Description**
BaaS Primary	This is the # of GB of primary backup to an InterVision datacenter. This service includes the managed backup software and a destination target.
BaaS Secondary	This is the # of GB of secondary backup to an InterVision datacenter. This service includes the managed backup software and a destination target.
Retention Storage	Additions Only
BaaS - Veeam - Cloud Storage	STL or Las Vegas QTY (GB) For AWS – Pricing must be obtained from AWS - S3 Standard, IA, Glacier.

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	For Azure – Pricing must be obtained from Azure - Hot, Cool, Archive.
BaaS - Commvault - Cloud Storage per GB	
RPaaS Resiliency	
SKUs	**Description**
BaaS - Managed Support for Backup Server	Backup Server Support – Includes OS, Hardware, and Backup Software
RPaaS Resiliency Server Protection (License + Managed Service)	Minimum of 25. Includes Device Licenses + Managed Services for BaaS and DRaaS Restore
RPaaS Resiliency Server Protection (BYOL + Managed Service)	Minimum of 25. Includes ability to bring your own licenses + Managed Services for BaaS and DRaaS Restore
RPaaS Resiliency Storage Protection (License + Managed Service)	Includes Device Licenses + Managed Services for BaaS and DRaaS Restore for file systems supported by Veeam
RPaaS Resiliency Storage Protection (BYOL + Managed Service)	Includes ability to bring your own licenses + Managed Services for BaaS aned DRaaS Restore for file systems supported by Veeam
Business Continuity and VDC Support	
SKUs	**Description**
AWS VPC Landing Zone (variable cost)	AWS environment where backups are stored and/or where cloud recovery occurs. Cost is determined by monthly resources utilized and passed directly through to the customer
Azure Landing Zone (variable cost)	Azure environment where backups are stored and/or where cloud recovery occurs. Cost is determined by monthly resources utilized and passed directly through to the customer
Contracted VDC Support (variable cost)	Support costs are based on a percentage of monthly utilization (see landing zones above)

SKUs from License, Management, and Storage categories are required in order to provide BaaS with Veeam.

Storage can alternatively be provided via DRaaS Restore.

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12 DEFINITIONS

Agent - A software module in the system that performs data protection operations of physical devices.

VBR Server - The module that communicates with all clients and coordinates operations (data protection, data recovery, and administration operations, job management, event management, etc.) within a management group.

Change Rate - Percentage of data changed over a specific period (usually a month)

CommServe Server - The module that communicates with all clients and MediaAgents, and coordinates operations (data protection, data recovery, and administration operations, job management, event management, and so on) within a management group. Hosted Café hosts and administers this server.

Data Compression - A method that reduces the amount of space needed for storing data

Data Encryption – A method that secures data at rest and in-flight

Disaster Recovery - The planning for and/or the implementation of a strategy to respond to such failures as a total infrastructure loss, or the failure of computers, networks, storage hardware, or media. A disaster recovery strategy typically involves the creation and maintenance of a secure disaster recovery site, and the day-to-day tasks of running regular disaster recovery backups or continuous replication (see DRaaS).

Disaster Recovery Backup - Backs up metadata and Windows registry data in two phases. In the first phase, the data to a local or network path is backed up. In the second phase, the data is backed up to media by using a disaster recovery backup storage policy. This data can then be restored by enlisting the assistance of the InterVision operations center.

Data Replication - Data replication is a secondary copy of production data by using a combination of host-based replication and snapshot technologies. Data replication copies can be accessed immediately for fast recovery, used to create multiple recovery points, or used to perform traditional backups without having an impact on server performance.

Management Group - The basic organizational unit of a data management system.

MediaAgent - The software/server module that transmits data between clients and backup media. The MediaAgent manages the data that is stored on the media. This can be located on the client premise or hosted in InterVision data center.

Primary Backup Copy - This is the first backup of the production data.

Offsite Backup Copy - this is an additional copy of the primary backup copy. This also referred to as a copy job. This is typically a copy created to be stored in a second location.

Primary Storage - Primary storage refers to data in active use from computer hard disks and/or volumes. Also referred to as production data.

Replication Policy - A centralized template through which configuration of replication sets/replication pairs within a management group can be accomplished. A replication policy consists of a common configuration for replication set and replication pairs that can be applied to target replication set/replication pairs within the management group.

Retention Period - The period for which a particular set of backup data has not exceeded its retention criteria. Once the retention period has elapsed and the data aging has been run, the data becomes unavailable for restores.

Retention Points - Number of successful jobs stored consecutively

RPO – Restore point objective. The restore point is determined by your backup scheduling.

RTO – Restore time objective. The restore time is determined by the method and the amount of data being restored.

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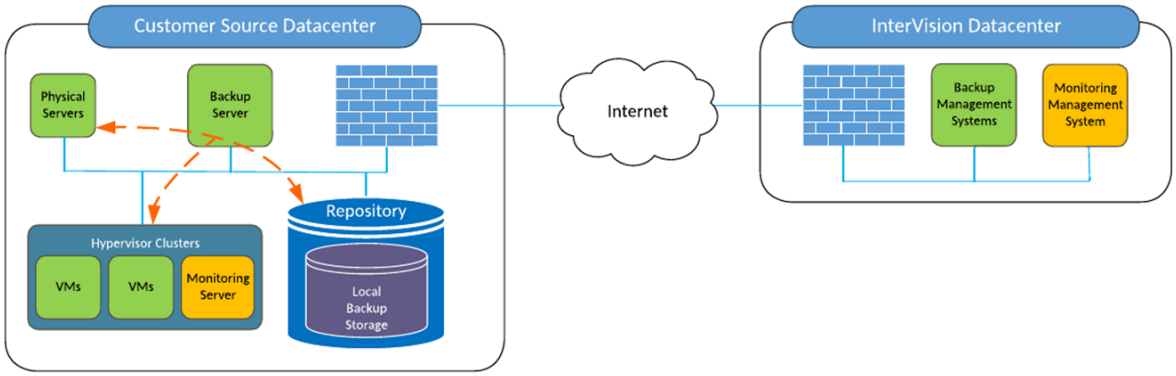
Secondary Backup Copy - This is an additional copy of the primary backup copy. This also referred to as an AUX or auxiliary copy of the data. This is typically a copy created to be stored in a second location.

Snapshot vs. Backup - Storage snapshots can be a part of a larger backup strategy. Snapshots provide quick and easy access to data and can be leveraged by backup applications to enable features like instant recovery. While storage snapshot technology is a helpful supplement to a backup plan, it is not considered a full replacement for a traditional backup.

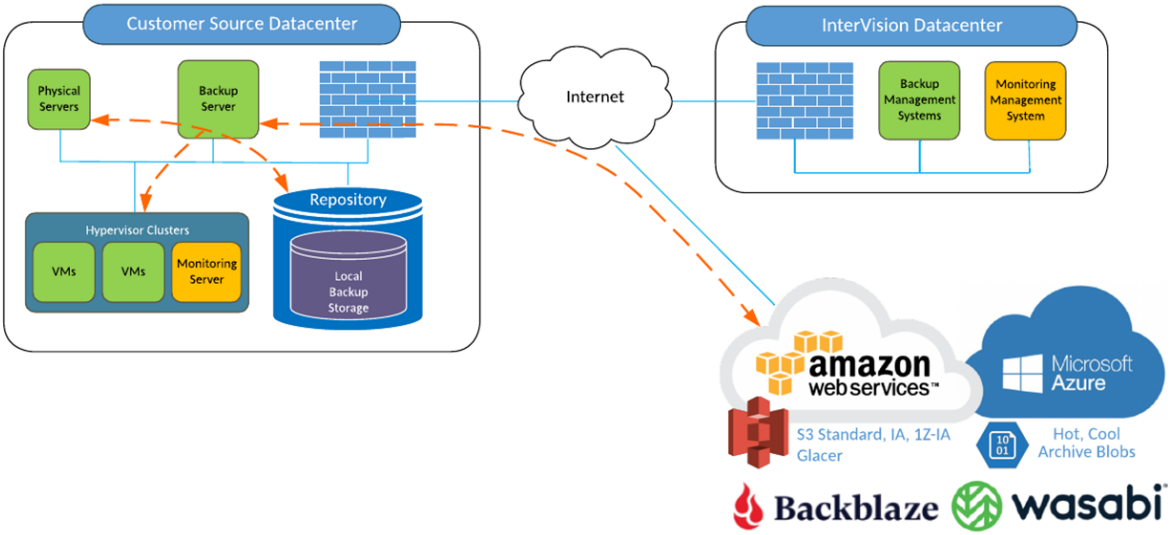
13 USE CASE DIAGRAMS

Backup Use Case: On-premises systems to an on-premises backup server. InterVision provides and manages the dedicated backup server as well as the backup operations.

Backup Use Case: Backup of on-premises systems with an offsite copy to the InterVision backup environment. InterVision provides and manages the hosted backup infrastructure in our data center as well as the backup operations.



Backup Use Case: Backup of an on-premises system with an offsite copy to manage cloud environments InterVision provides and manages the public cloud backup infrastructure as well as the backup operations.



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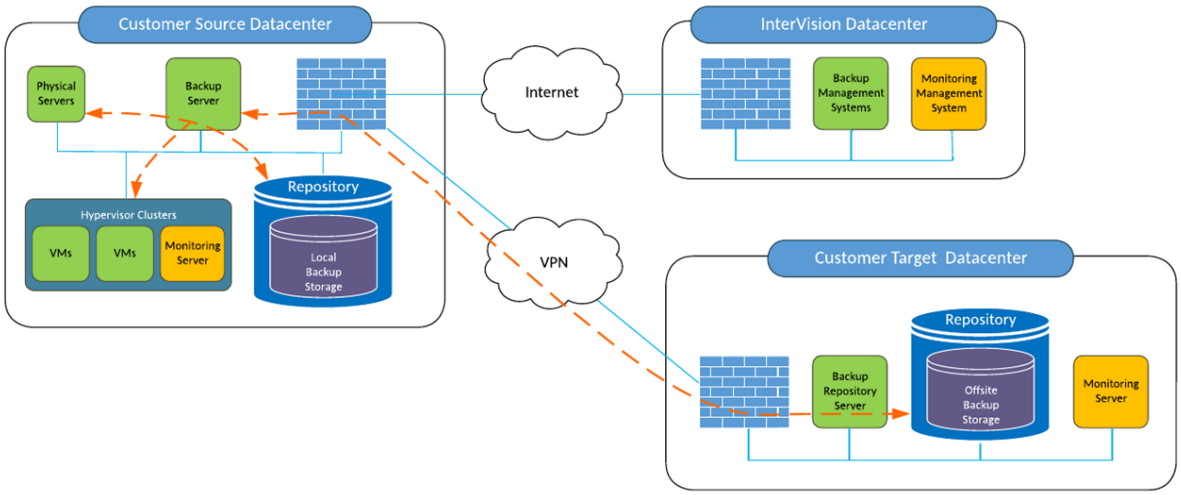
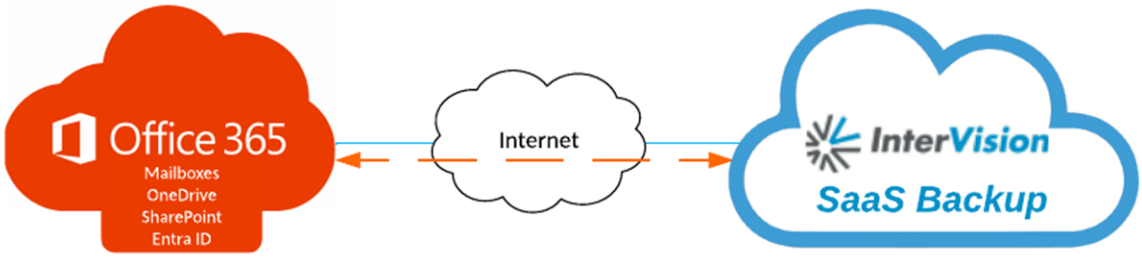
Backup Use Case: Backup of the on-premises system with an offsite copy to a secondary customer location. InterVision provides and manages the backup infrastructure as well as the backup operations.



Office 365 Backup Use Case: Backup of M365 and Entra ID data and stored in cloud with custom retention. InterVision manages, monitors, and maintains the backup service.



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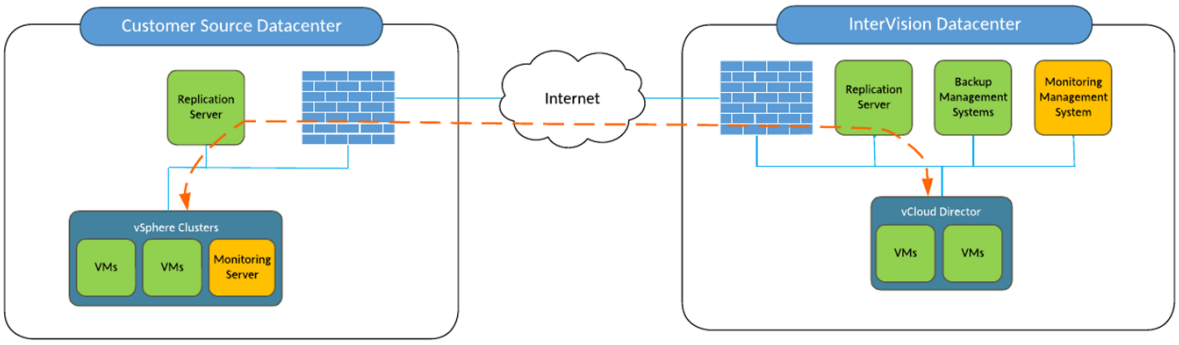
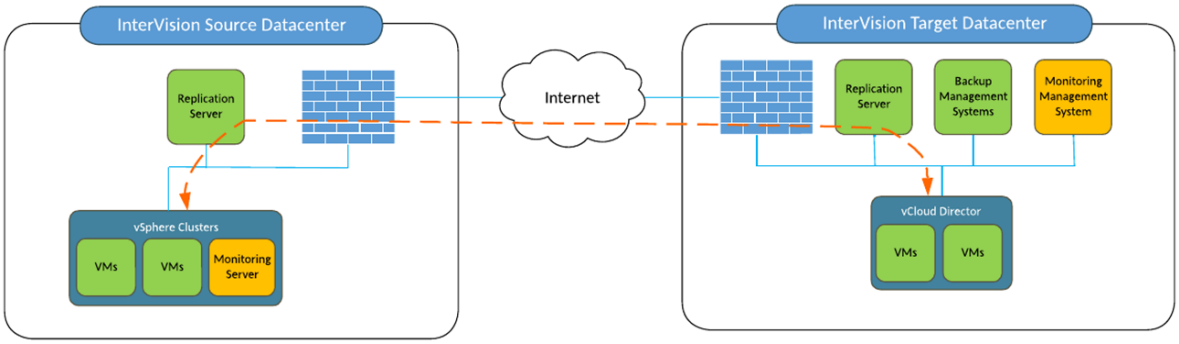
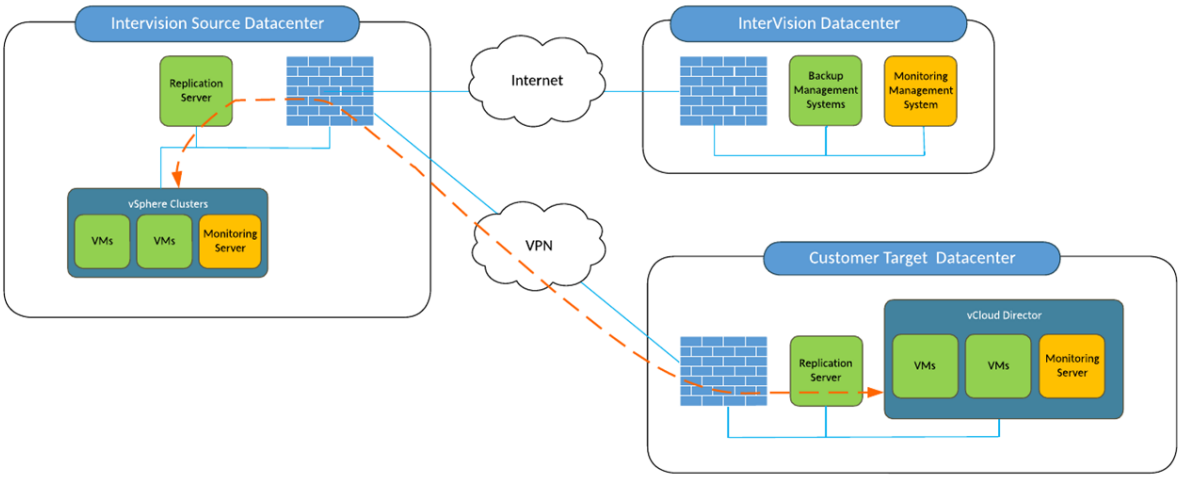
Replication Use Case: Replication from the on-premises backup server to InterVision's data center.



Replication Use Case: Replication from InterVision cloud-hosted BaaS infrastructure to a secondary InterVision data center.



Replication Use Case: Replication of the on-premises system to a secondary customer location. InterVision provides and manages the backup infrastructure as well as the backup operations.



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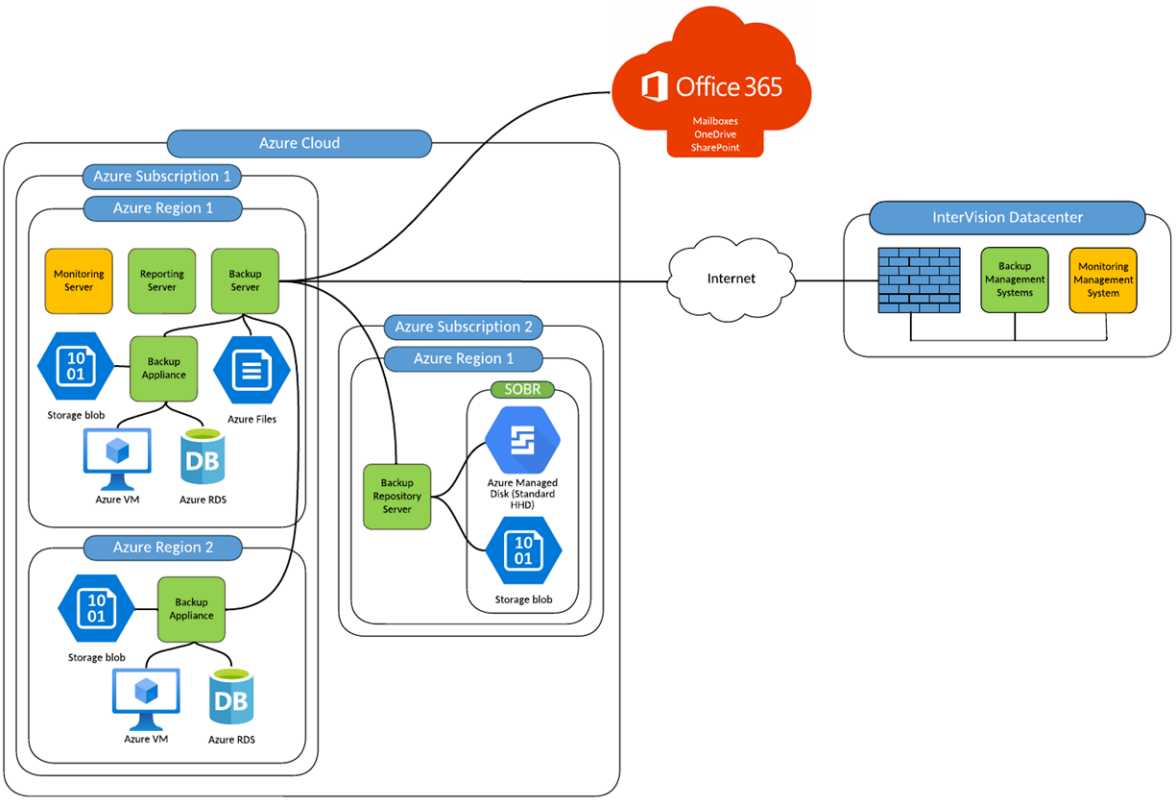
In Cloud Backup Use Case: Backup of data in Azure or AWS plus native SaaS solutions.



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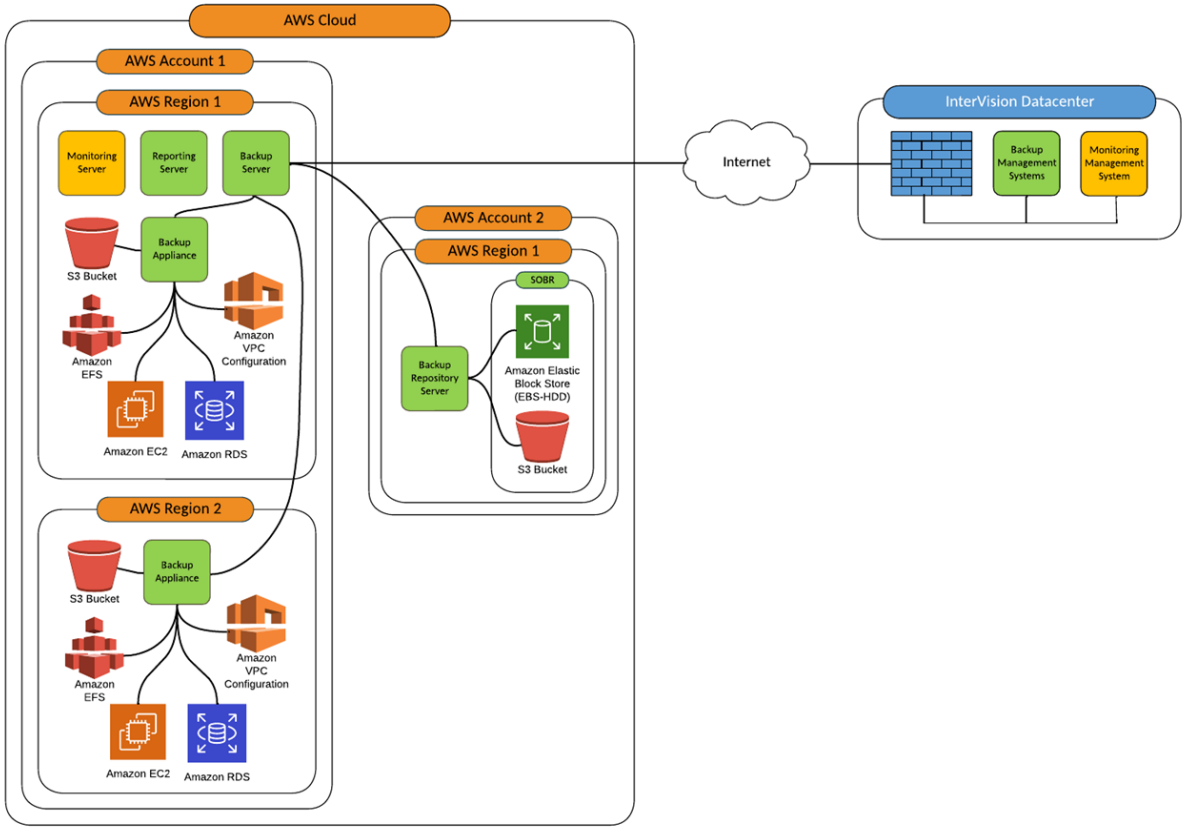

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14 CHANGE LOG: BACKUP AS A SERVICE (BAAS) - SERVICE GUIDE V2

Below are the changes to this service guide.

Change date	Change Type	Change Details
21 May 2024	New Document	Initial release
25 June 2024	Update	Added SKUs for secondary managed servers
30 Aug 2024	Update	Added descriptions to KeepIt SKUs

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