



Intelligence from ground to cloud

SMART BACKUP- Backup and Archiving Solution from Galvantrix

July 2018





Why choose Smart Backup





Smart Backup from Galvantrix



- **Backup all your Salesforce data on a secure AWS cloud.**
- **Archive all data that is required only for reference or statutory purposes.**
- **View your data in the same format as in Salesforce.**
- **Easy 'one click' access to all archived data. View from a tab within Salesforce.**
- **Single sign on access for all users without the need to login anywhere else.**
- **Enforce the same set of permissions as are available in Salesforce.**
- **Trusted partner for large number of organizations – Galvantrix has been a part of the Salesforce family for over six years.**

Smart Backup from Galvantrix

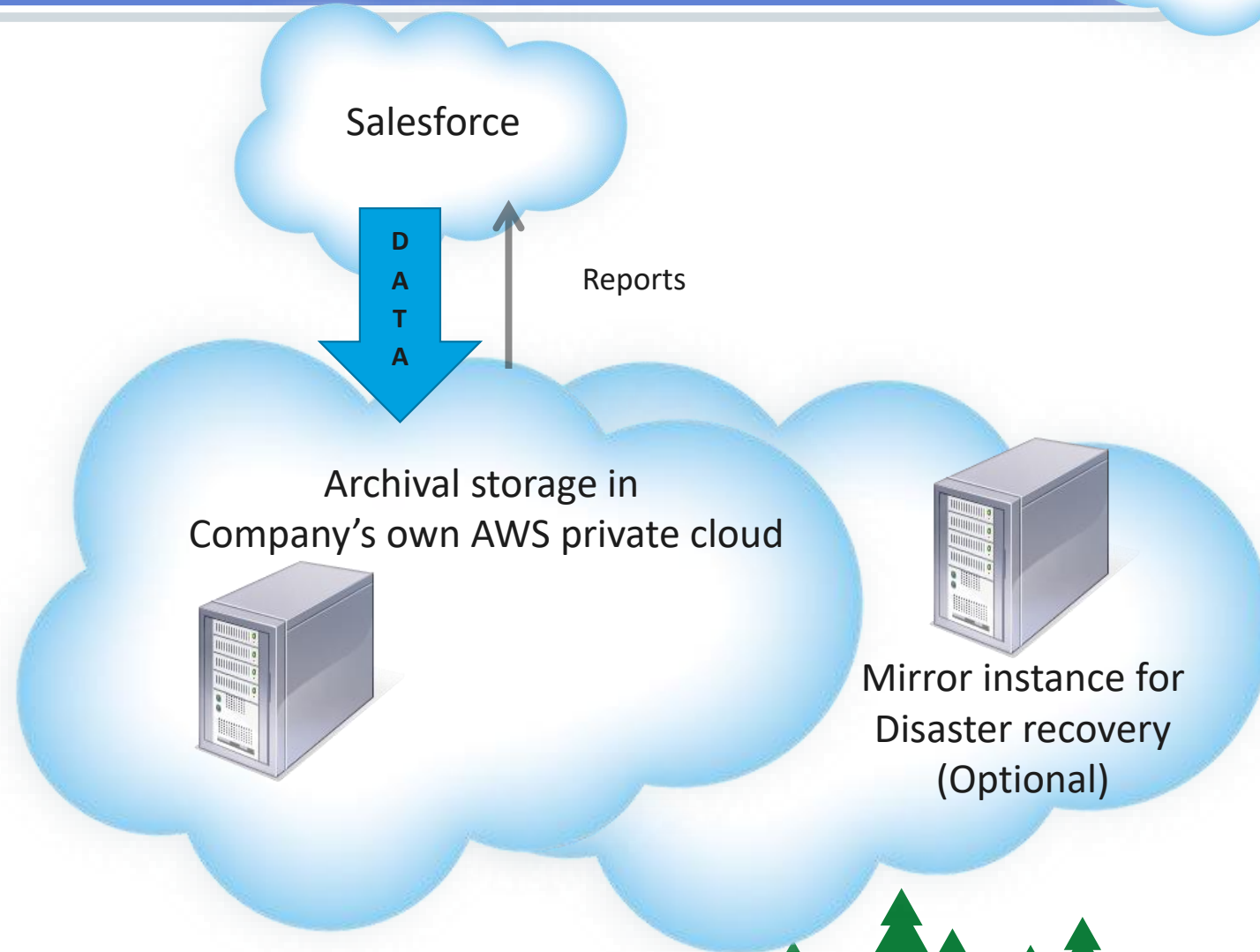
- **Rapidly growing organizations that have ever growing data can save on cloud storage costs (USD 3,000 per GB of additional storage).**
- **Secure data in the Amazon Web Services (AWS) cloud, in Singapore or other regions depending on requirement.**
- **Local presence in Singapore for support.**
- **Enhance this solution to use for data analytics.**
- **Access your Salesforce data even without Salesforce.**
- **Rapid set up to go live within a month.**



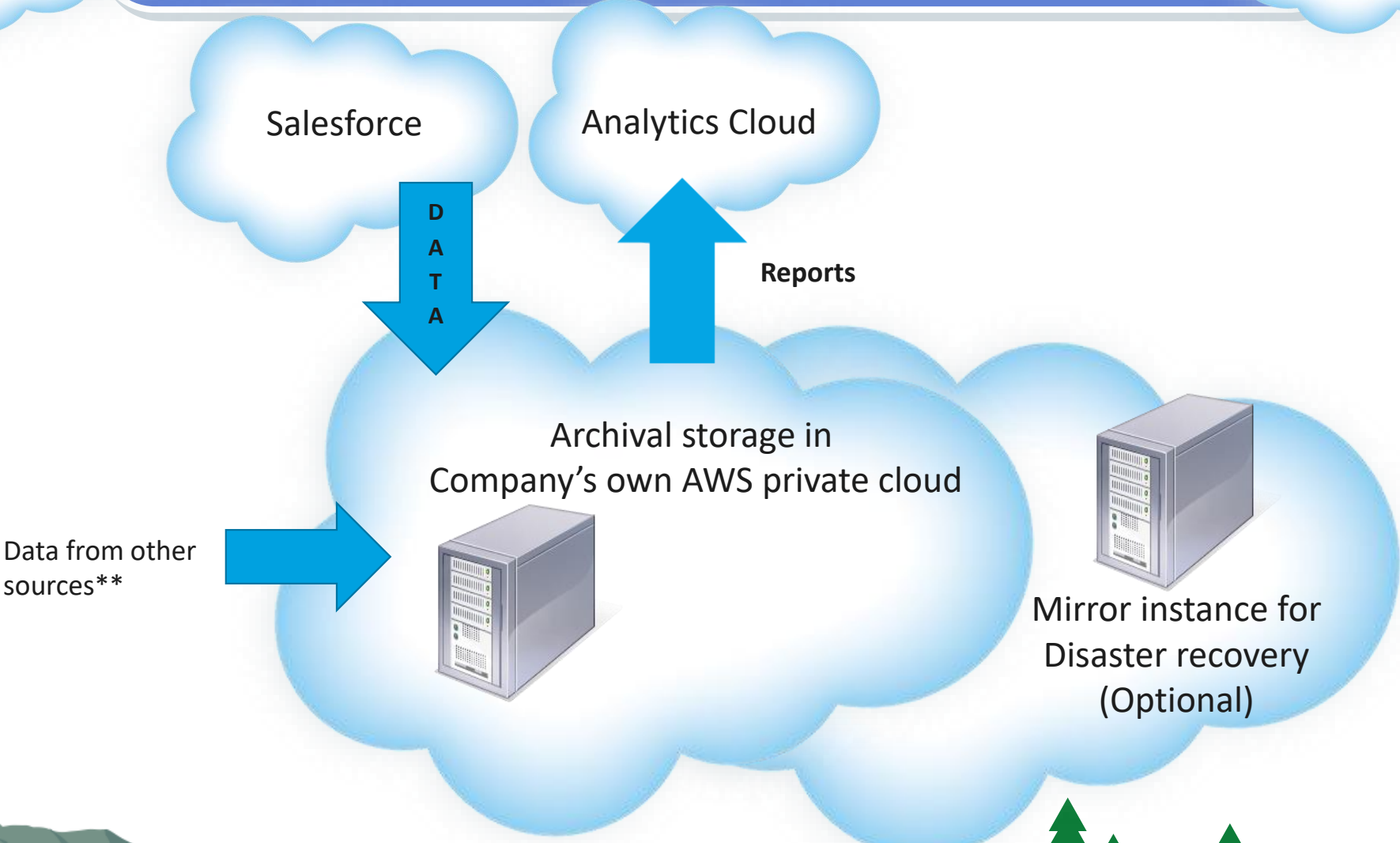
Architecture and Process Flow



Smart Backup from Galvantrix- Core offering



Smart Backup from Galvantrix- Enhanced



Overall Process Flow

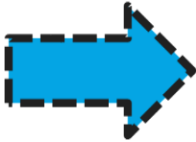
1. Ensure correct settings in Salesforce (for a custom archival process)



2. Initiate archiving process in AWS archiver**



3. Set up archiving process in Salesforce (Auto)



4. Approve archive master in Salesforce- using organization's approval requirements



5. Delete records in Salesforce and update archive status of records in AWS (Auto)



6. Update status in Salesforce and delete the archive data file (Auto)

** Next slide

Process flow within AWS archiver

1. Select date range within which archiving is to be carried out.
Date criteria to be set here (Last modified or Created date)



2. Select objects that need to be archived.
Note: All Salesforce objects are available for archiving in AWS



3. Select additional filter criteria for archiving (e.g. Case status= Closed etc.)



Simple Salesforce Configuration

Simple Salesforce Configuration

- **Custom settings to ensure that inadvertent archiving is not allowed for date ranges that are needed in Salesforce**
- **Approval processes for archiving based on standard approval processes in Salesforce**
- **Profile control for initiating archiving processes**
- **Approval process keeps complete history of all archival processes**
- **Backup as a pre-cursor to archiving**
- **Single Sign On from Salesforce instance to Archiver in AWS**



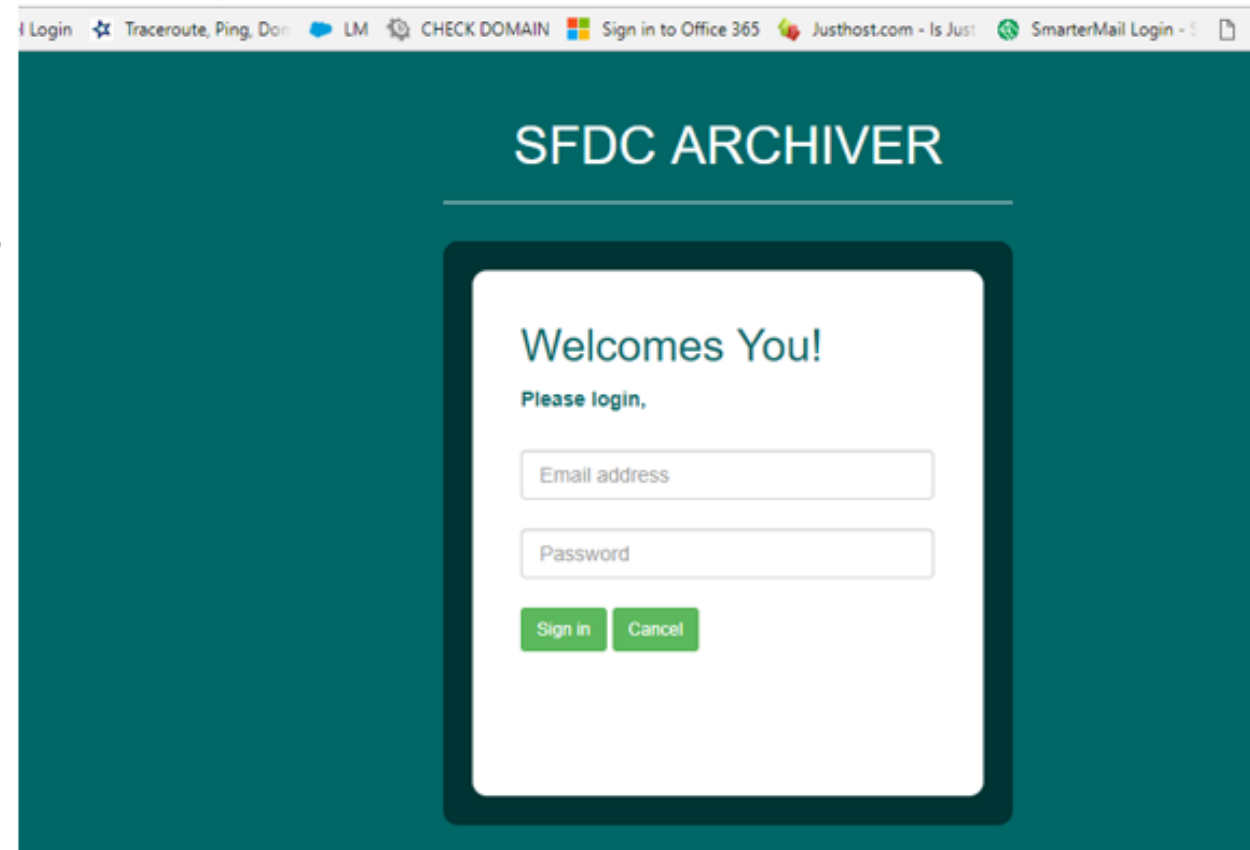
Connected AWS



AWS Login (for Administrators)

- Type URL <http://<Custom URL>>
- Enter Login Credentials to login to the AWS instance

Note: Login is permissible only from whitelisted IP ranges. Setting permissible IP ranges is done from the Admin console in AWS



The screenshot shows a web browser window displaying the login page for 'SFDC ARCHIVER'. The page has a dark teal background. At the top, the text 'SFDC ARCHIVER' is displayed in white. Below this, a white login form is centered. The form contains the following elements: a heading 'Welcomes You!', a sub-heading 'Please login,', an input field for 'Email address', an input field for 'Password', and two buttons: 'Sign in' and 'Cancel'.

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Approval in Salesforce to Archive data



Approval process flow in Salesforce

1. Automatic triggering of the approval process. Approval levels depend on the organization's approval policies



2. Approvers view the records and approve



3. Upon approval, Salesforce records are deleted and corresponding record status in AWS is changed to 'Archived'



Options





Options

- **AWS location – choose from a variety of data centers globally (AWS Regions)**
- **Mirroring option – recommended to use a pure mirroring option in another data center in a different AWS Region or Zone to establish complete redundancy.**
- **Either of the mirrored centers can be used as primary. Extremely useful for any enhancements that may be required by the customer. e.g. Enhancements for analytics.**

Options

- **Standard option – single server back up and archiving solution comes with the following specifications:**
 - ❖ **d2-xlarge – Extra Large with total storage capacity of 6 TB**
 - ❖ **Optimized for storage**
- **Mirroring option –**
 - ❖ **Two d2-xlarge servers in a different zone in the same region. One primary and the other secondary. Backup and archiving on the primary and replication on the secondary server.**
 - ❖ **Either of the mirrored centers can be used as primary.**
 - ❖ **Additional option for analytical layer will be taken up as a separate project.**

Contact us

Thank you

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