CARBONITE

Carbonite Safe

Handbook - Mac 2.x

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Important Things to Know

Reboot Your Computer at Regular Intervals

If your computer remains on or only rests during sleep mode for long periods of time, it is prudent to completely restart it weekly to ensure that Carbonite's connection to our servers stays strong.

Default Backup Selections

Carbonite will select *Macintosh HD / Users* for backup by default if you opt for Carbonite's recommended backup selections during installation. Files and folders not located within the structure of this directory must be manually selected for backup.

The following types of files are also not backed up automatically and must be manually selected for backup, regardless of location:

- Video Files
- Files over 4 GB in size

Status Icons

Within the Carbonite application, colored icons will be placed upon the icons of files and folders that have been included in your backup. This makes it easy to tell what is backed up.

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Carbonite Features

Carbonite offers a number of beneficial features to all of our customers, including:

- **Automatic and Continuous Cloud Backup**
    - Automatically back up your files to our servers and restore them any time you need.
- **Easy Controls, Simple Interface**
    - See the backup status of any file at a glance with our status dot system, and manually add/remove a file from your backup (if you choose to) with a few mouse clicks.
- **Security and Privacy**
    - Files are transferred using 128-bit encryption, so no one else can see your personal data.
- **Anytime Anywhere Access**
    - Access your backed-up files from any internet-connected computer and compatible iOS and Android mobile devices. Anytime, anywhere.
- **Free Support from Carbonite Customer Care**
    - Call, chat, or email Carbonite Customer Care for help with any Carbonite-related issues at no extra charge.

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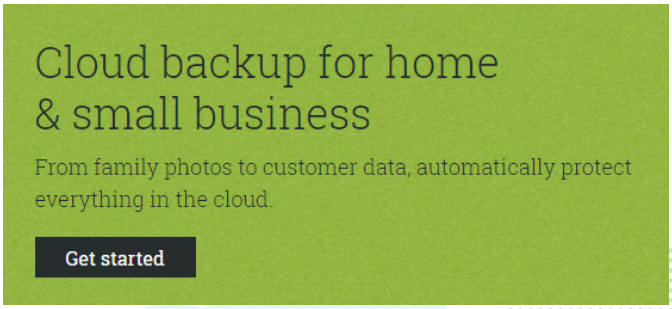
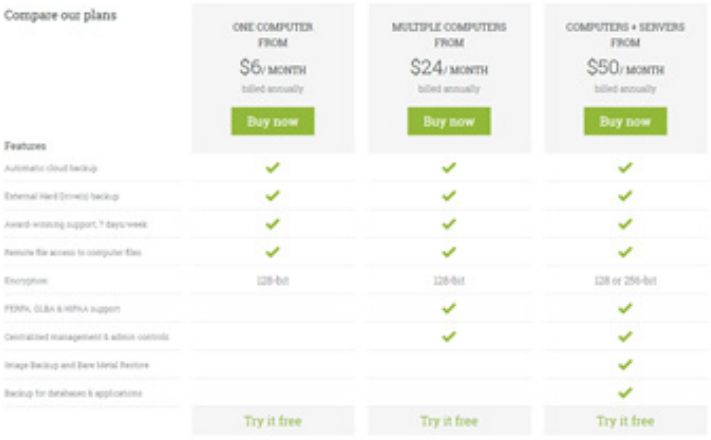
Setting Up and Installing

Setting up a trial with Carbonite is easy.

1. On the Carbonite.com homepage, click **Get started** under the *Cloud backup for home & small business* section.





2. Under the column *One Computer from $6/ Month billed annually*, select **Try it free**.

3. Fill out the required information, then click **Submit**.

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Starting a Trial

That's it. Your trial account is created. Your web browser will begin downloading the Carbonite installer. Run the file to install Carbonite and begin backing up your system.

You can use the software completely free for *15 days with no catch*. If you decide Carbonite is not for you, just uninstall the software. Your trial account will expire and eventually delete itself from our servers.

If you *do* like Carbonite, you can convert your trial account to a paid subscription and continue your backup normally.

Installing Carbonite for the First Time

You will get to configure the initial settings of your Carbonite software while installing Carbonite for the first time. To install Carbonite, run the Carbonite installer file that downloaded after starting your trial or paid subscription.

You can always download the installer file again for an existing account by logging into account.carbonite.com and clicking **Start a Trial** (to begin a trial), or **Computer options** then **Reinstall Carbonite** (for paid subscriptions).

1. First, click **Continue** in the *Terms of Service* window.
    - You will have to enter your *Mac password* (not your Carbonite password) in a popup to proceed.
    - A progress bar appears on the screen as the software installs. Allow this to complete.

2. Next, you'll make your initial backup selections.
    - You'll see six boxes. Each box corresponds to a folder inside your home folder. Mark the checkbox inside each box that you want to back up with Carbonite. Then click **Install**.

- Another progress bar will appear. Allow this to complete too.

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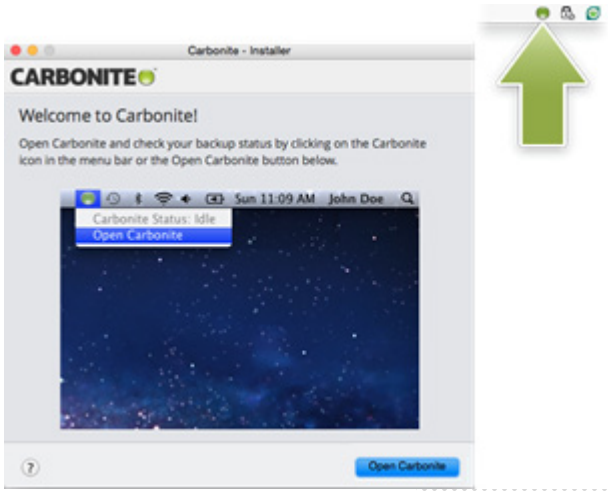
3. When the installation completes, you'll see a welcome screen and a big green arrow pointing out the Carbonite icon in the menu bar.



The installation is now complete. Carbonite will begin backing up your computer following the settings you chose during the installation.

- The initial backup of your computer can take up to *several days*.
    - This is normal for an initial backup, since you are starting from scratch and everything has to be uploaded.
- After the initial backup completes, Carbonite will periodically scan your backed up files for changes and only upload changed files throughout the day.
- These automatic maintenance backups take much less time to complete and will take place in the background while you use your computer normally.

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Buying a Subscription

There are two ways to begin a paid subscription: purchasing a new subscription immediately, or converting a trial to a paid subscription.

Subscription Pricing

Carbonite plans are available in annual subscriptions. The price per year depends on the type of product you are purchasing.

You can also purchase subscriptions for multiple years and receive a discount. More details about these plans, pricing and the features available for each product can be found here.

Purchasing a Subscription

1. From the carbonite.com homepage, click **Get started**, then click **Buy now** on the plan you'd like to purchase.
2. Select the plan length (you can save money by purchasing longer subscription lengths), then select **Next step** to enter your name, email address and create a password.
3. Click **Continue to billing** once this information has been entered.
4. Enter your billing information on the next page. You can change the plan you have in the cart by selecting **Change Plan** beneath your order total. When ready, click **Complete my purchase.**
5. You will see your purchase confirmation. Click **Download Carbonite now** to begin downloading the software.

Converting a Trial to a Paid Subscription

1. Log into your trial account at account.carbonite.com.
2. You will see your trial computer listed. Click **Buy Now**.
3. Select the plan and subscription length that you'd like to purchase, then click **Continue to billing**.
4. Enter your Billing Information in the fields provided and click **Complete my purchase**.
5. The next screen shows your purchase. Your Carbonite software will update automatically the next time it connects to the Carbonite servers.

Need Assistance Purchasing?

You can search our Knowledge Base for assistance with purchasing a subscription.

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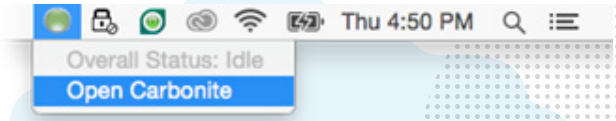
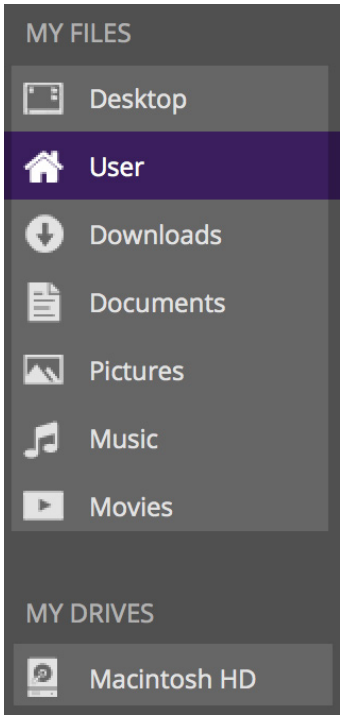
How to Back Up Files

Carbonite will automatically begin backing up the documents in the folders that were selected during installation. You don't have to do anything extra to back them up.

However, you can browse your computer's folders to view individual files backup status, and add files to your backup manually.

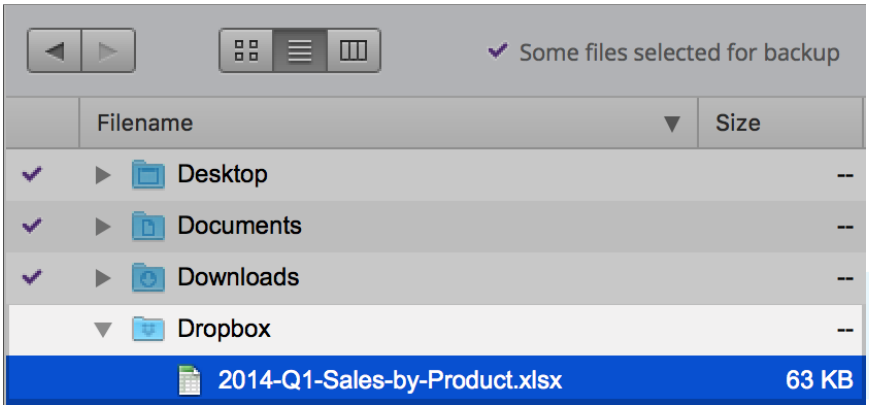
1. Click the Carbonite icon in the menu bar, then click **Open Carbonite.**





2. Click one of the items listed under MY FILES or MY DRIVES on the left to begin browsing your files in that location.
    - MY FILES lists the folders under your home folder.
    - MY DRIVES lists the hard drives in your Mac.
    - With any selection, you can browse through any subfolders that may exist in them.

3. Locate the file or folder that you want to back up and select it in the main window.



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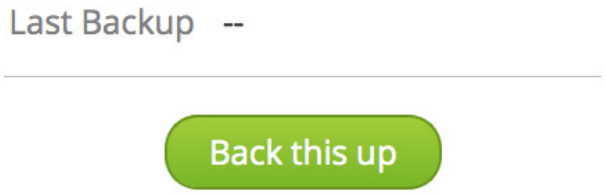

4. Click **Back this up** in the bottom right corner.

Excluded File Types and Locations

There are certain types of files and folder locations that cannot be selected for backup for various reasons. Some examples include:

- **Programs**
    - Programs are installed to a computer's specific environment. Restoring a program to a different computer will not function properly and may even cause errors, so we exclude them.
- **Applications**
    - On Macs, most applications are actually bundles of constantly changing files. The constant change causes Carbonite to get stuck continually backing them up. Since applications are separate from your data and can be reinstalled in working order by other methods, we exclude them.
- **System Files / Information**
    - These files depend on the hardware and environment. Restoring them to a different computer would likely cause problems. Therefore, we do not back them up.

For full details on file types Carbonite backs up, please click here or search our Knowledge Base.

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How to Remove Files

If you are currently backing up a file (or folder) that you don't want in your backup, removing it from the backup is easy.

1. Browse to the file or folder that you want to remove from your backup and select it using steps 1-3 in the previous *How to Back Up Files* section.
2. Click the **Don't back up** button in the bottom right.

This will make sure that Carbonite stops backing up the file. The file will be removed from the Carbonite cloud within 72 hours.

If you remove an entire folder from your backup, all files within the folder will stop backing up, and their backed up versions will remove themselves from the backup within 72 hours. Furthermore, no future files you save in that folder will be backed up.

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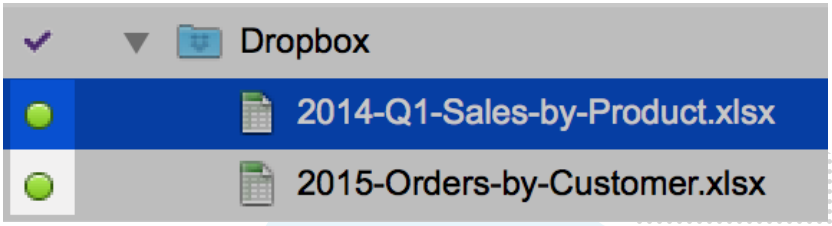
Testing a Restore

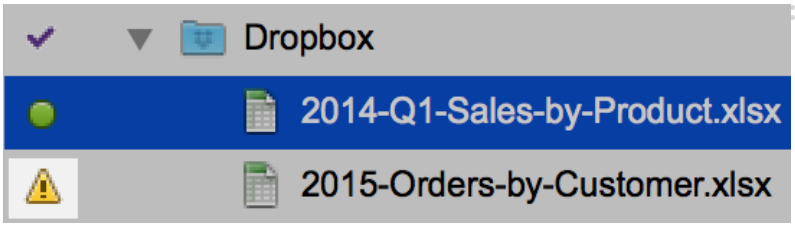
We encourage all users to test the restore process to ensure that the connection between the Carbonite servers and your computer are running properly.

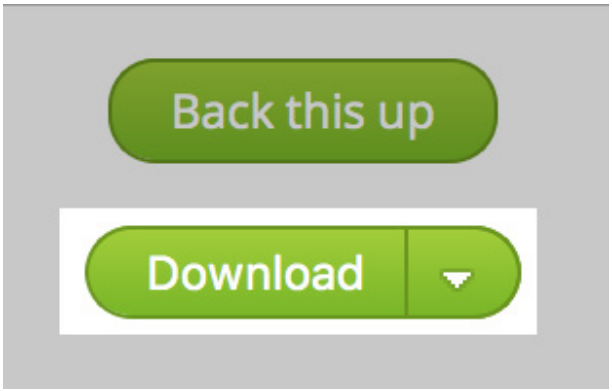
1. Copy a file on your computer, and make sure it is backed up with Carbonite (look for the green status dot).



2. Once the file shows it is backed up, open **Finder**, browse to the file and delete it from your computer.

3. Return to the Carbonite application and select the file name that you deleted.
    - You will see the file marked with a yellow alert triangle. This indicates that your file is backed up with Carbonite, but is not present on your computer.





4. Click the green **Download** button in the bottom right.

- Your file will begin downloading back to your computer at this point. No further action is necessary. However, if you'd like to watch the restore progress, continue with the steps below.

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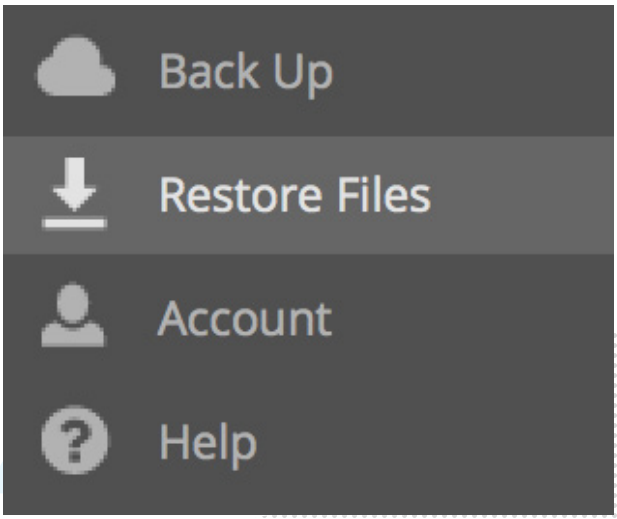
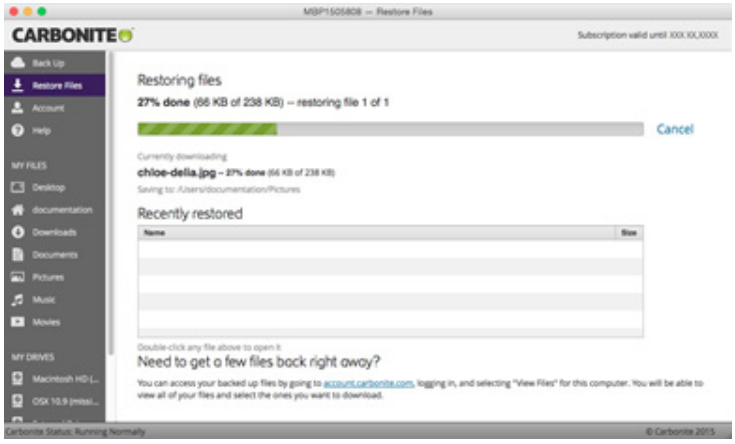
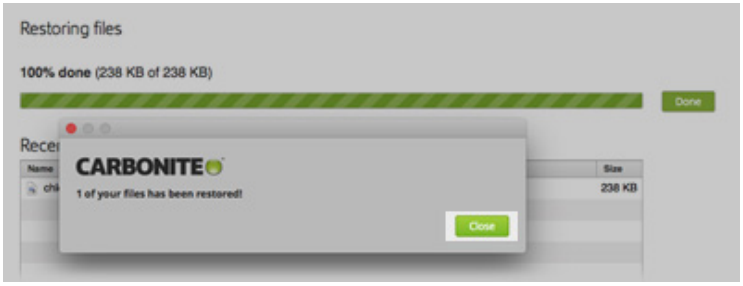
5. Click **Restore Files** in the top left.





6. Allow the progress bar here to complete.

7. A confirmational popup will appear when your restore is finished. Click **Close**, then open Finder and browse back to the folder. You should see your file restored.



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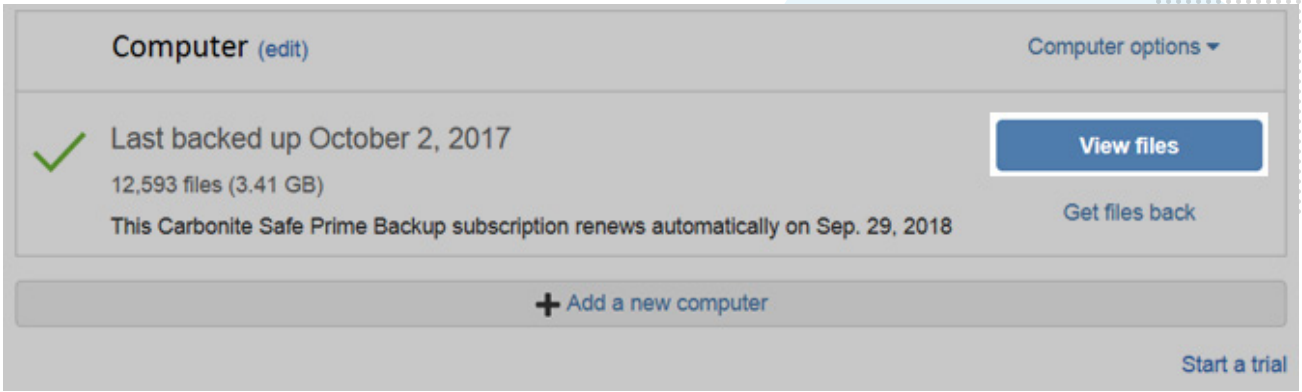
Anytime Anywhere Access

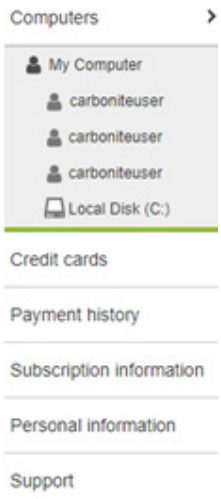
Once your backup contains files, you can log into your account online and from any internet-connected computer to view your files.

You can also download copies of your files to that computer if you need to use them wherever you are. Keep in mind that any changes you make to those copies remotely won't be backed up, since the Carbonite software is not actually on this machine.

1. Log into your account at account.carbonite.com.
2. You will see your backed up computer(s) listed. Click the **View Files** button next to the correct computer.



3. The library folders for your default user profile will display near the middle of the screen. You can click through the folders to browse your backed up files, the same way you would in *Finder*. In the *Computers* pane on the left, you can click a different user profile or a different drive letter to begin browsing your backup from there.



4. To select files to download to your computer, mark the checkbox(es) next to them.
    - You can select up to 5000 items or 10 GB to download at once.

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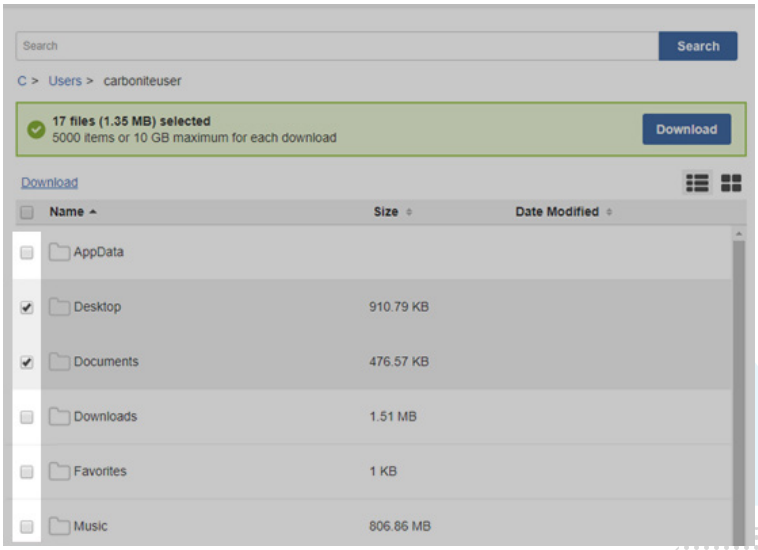
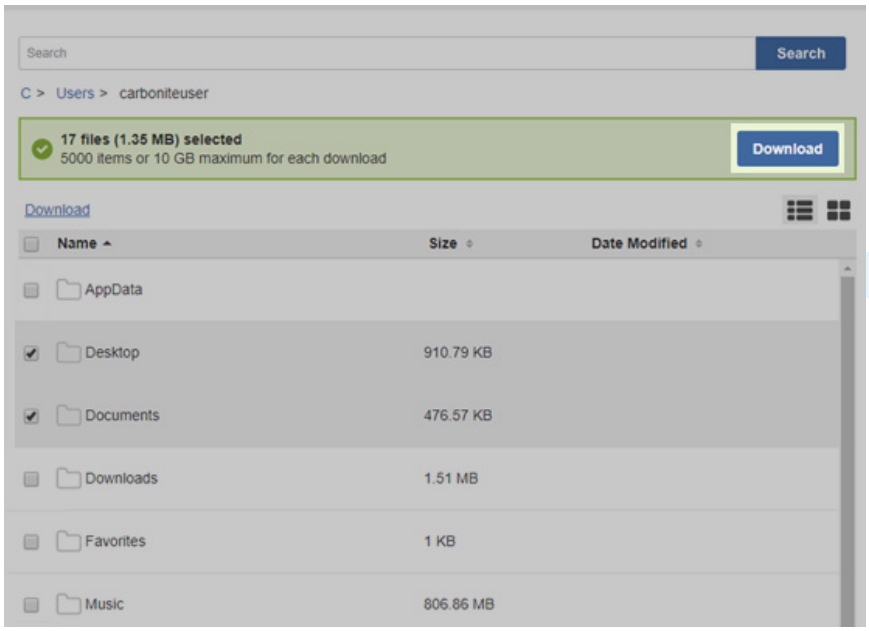
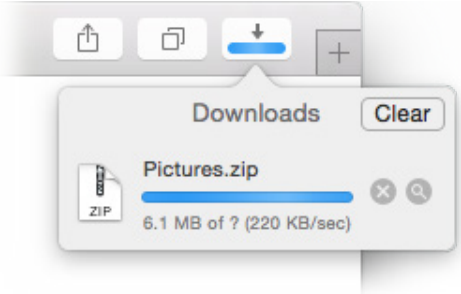


5. Then click the **Download** button.



6. If you selected multiple files, they will be combined in a single .zip file before downloading. Single files will download normally. Click the **Save** option in your web browser to save the file. You will then be able to open and use the file(s) normally.



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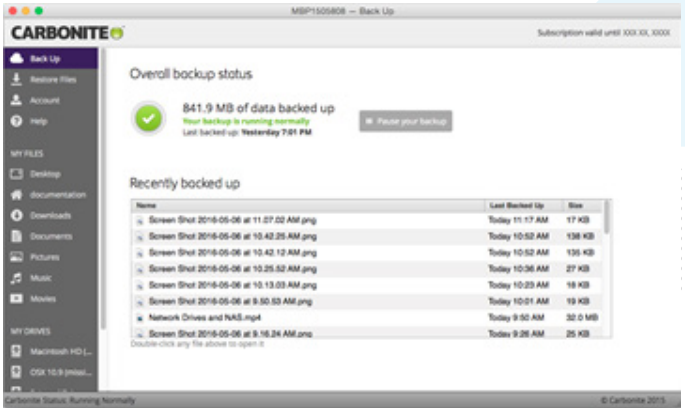
The Carbonite Application

The Carbonite application allows you to pause the backup, restore files, change backup settings, review account details and contact Customer Care.

The Carbonite application can be opened by clicking the Carbonite icon in the menu bar, then clicking **Open Carbonite**. The main four tabs are located near the top left of the interface (click on them to select them).

The Back Up Tab

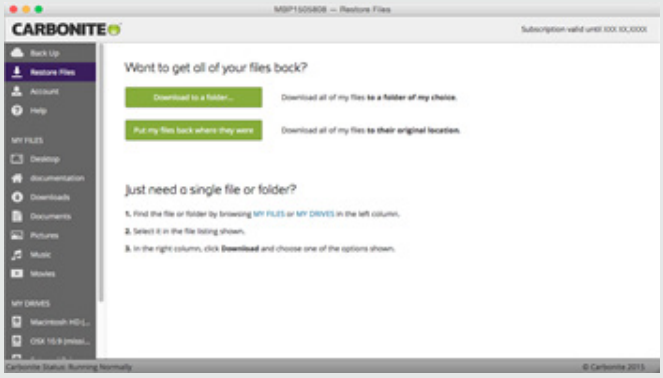


The *Back Up* tab is the default tab that displays when you open the Carbonite application. You can pause your backup and view your recently backed up files.

The Restore Files Tab

The Restore Files tab allows you to begin a restore of files to your machine. It will also show you the restore progress when a restore is already in session.

While a restore is not in session:



- **Download to a folder...:** Clicking this button allows you to download all of your backed up files to a single folder, which you can reorganize later. Choosing to restore this way will minimize the chances that existing files on your machine (which may contain more recent information) will be overwritten with the restored version.
- **Put my files back where they were:** Click this button to restore all backed up files to the locations where they were backed up from.

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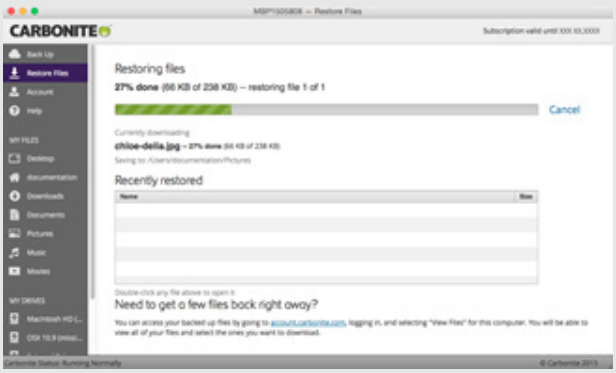
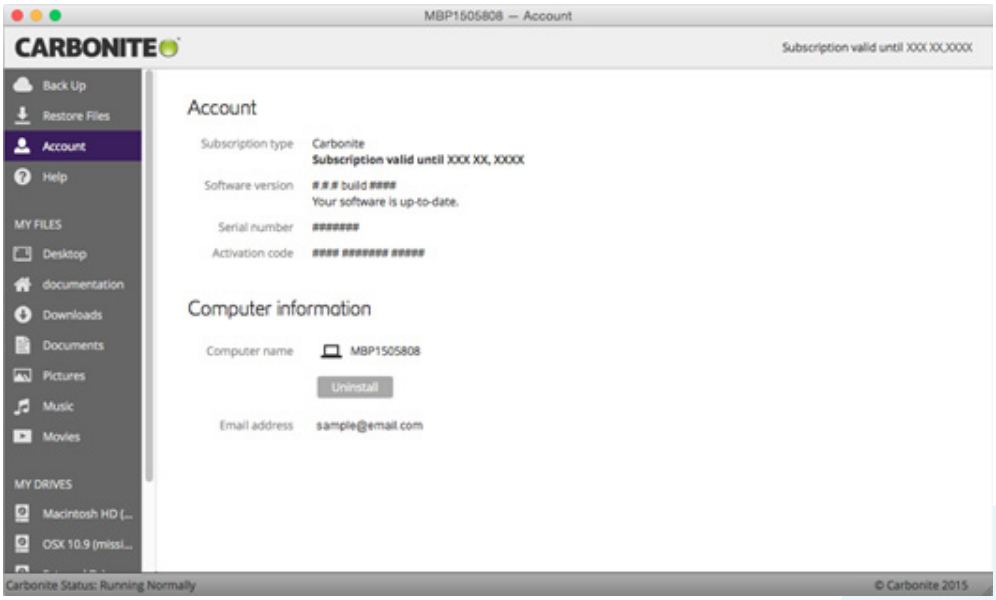
- **Just need a single file or folder?:** Describes how to restore individual files instead of a full restore.

While a restore is in session:



- Near the top, you'll see how far along the current restore job is as:
    - A percentage
    - The total file size restored versus the total file size selected for restore
    - The number of files restored versus the number of files selected for restore
- **Currently downloading:** Lists the file currently restoring to your computer and where it's restoring to
- **Recently restored:** Lists the last few filenames that were restored during this restore session.

The Account Tab



The *Account* tab shows information about your account and the Carbonite software currently running on your machine.

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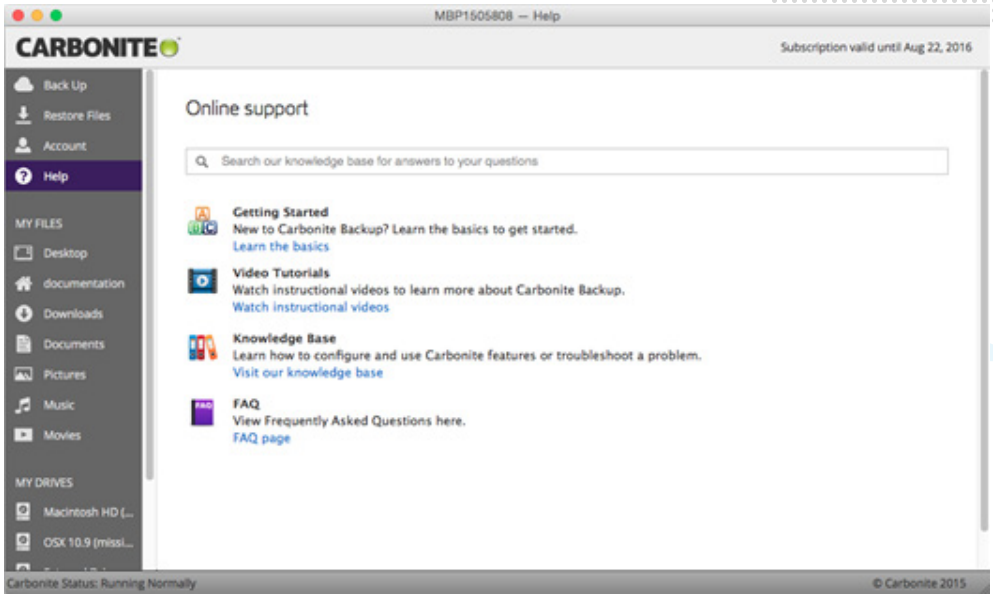
- **Subscription type:** Lists the Carbonite product installed.
- **Software Version:** Lists the version of the product that is installed. If your version is not the latest released version, this will also show a download link to update your software.
- **Serial number:** Shows the serial number for your particular installation of Carbonite.
- **Activation code:** Shows the code attached to your installation that verifies your installation as valid and connects it to your account.
- **Computer name:** Shows the name of your computer (as set in the Sharing section of System Preferences).
- **Email address:** Shows the email address for your Carbonite account. This is the same email address you would use to log into your Carbonite account online.

The Help Tab

The *Help* tab contains various informative links to our website for help getting started, video tutorials of Carbonite controls, our Knowledge Base articles and FAQs.



MY FILES and MY DRIVES

These sections are very useful for viewing your backup, changing the backup status of files and folders, and restoring files. For more details on using these sections, please review the **How to Back Up Files and Testing a Restore** sections above.

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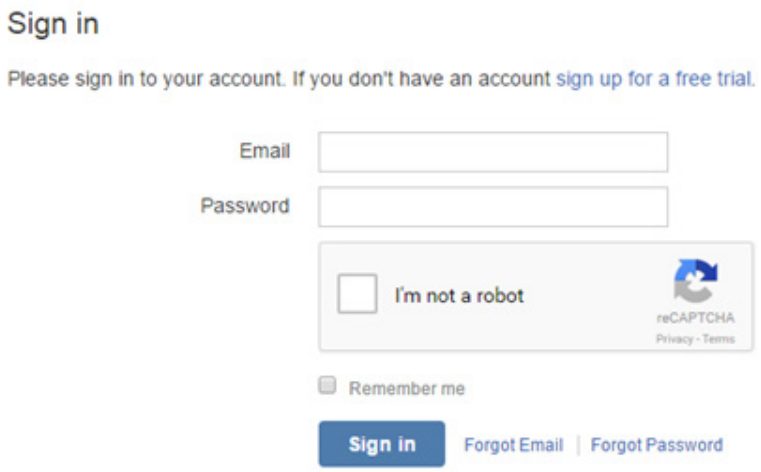
Your Carbonite Account

Selections and settings for backups and restores are controlled from the computer where Carbonite is installed, but your online Account Dashboard is the control hub for all other aspects of your account. From within your Account Dashboard, you can:

- Reinstall Carbonite
- Transfer Carbonite to another computer
- Remotely access backed up files
- Convert a trial subscription to a full subscription
- Purchase subscriptions for additional computers
- Update your email address, password, security questions and/or security phone
- Update your billing and personal information
- Check your billing history
- Change your automatic billing status

You can log into your account any time after installing Carbonite by navigating to account.carbonite.com in your web browser and entering your login credentials:



If you experience difficulty logging in, click *Forgot Email* or *Forgot Password* for assistance.

After your account is established, Carbonite requests some information from you to help it stay secure. We will use this information to identify you as the account owner if you ever need help with account-related problems (like resetting your password).

You'll be required to fill out some contact information and enter security questions when you log into your online account for the first time. You're also encouraged to setup Two-Factor Verification for added security.

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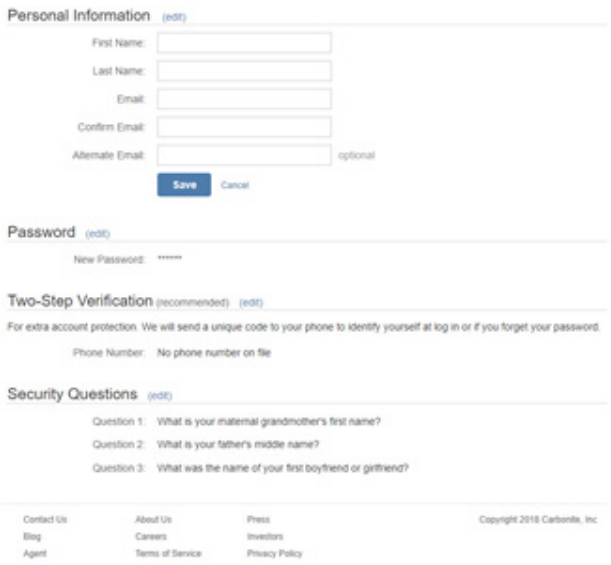


Renewing Your Subscription

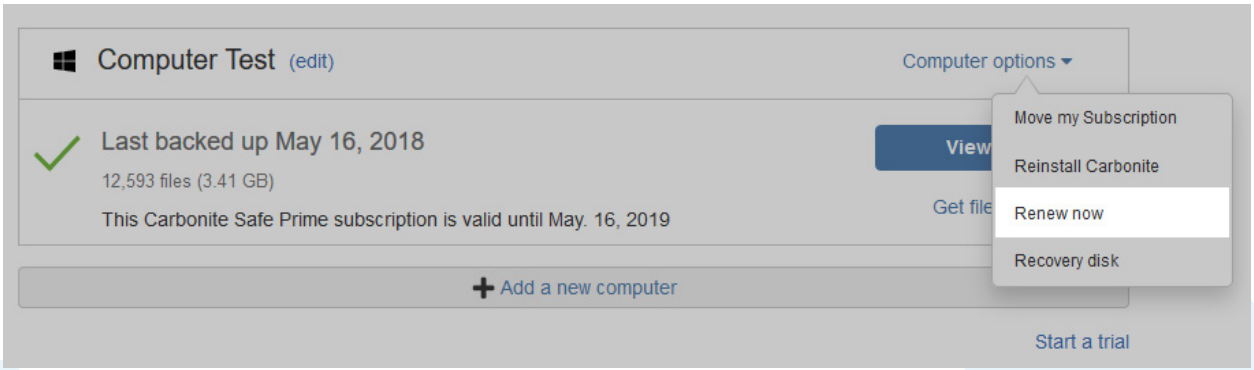
Carbonite offers one-year, two-year, and three-year subscriptions for Carbonite Safe Basic, Carbonite Safe Plus, and Carbonite Safe Prime.

The easiest method to purchase a subscription is through your Carbonite account. The subscriptions available for purchase depend on how you originally signed up for Carbonite and which subscription you originally purchased for your computer. Alternatively, you can upgrade or downgrade your Carbonite subscription.

Renewing Early

Log into your Carbonite account at account.carbonite.com.

Once logged in, click **Computer options**, then select **Renew Now**.



After clicking **Renew Now**, follow the prompts to complete your purchase. A confirmation page will then be displayed, and you will receive a receipt by email to confirm your purchase.

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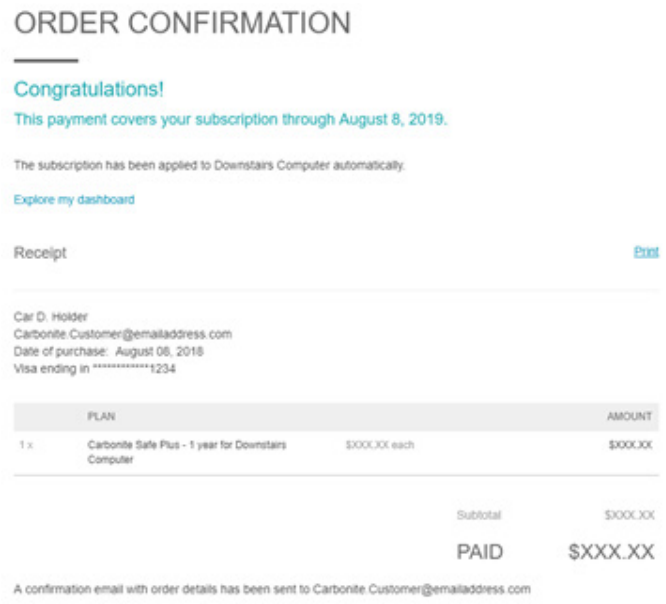

ORDER CONFIRMATION

Congratulations!

This payment covers your subscription through August 8, 2019.

The subscription has been applied to Downstairs Computer automatically.

Explore my dashboard

Receipt Print

Car D. Holder
Carbonite.Customer@emailaddress.com
Date of purchase: August 08, 2018
Visa ending in **********1234

	PLAN		AMOUNT
1 x	Carbonite Safe Plus - 1 year for Downstairs Computer	$XXX.XX each	$XXX.XX

Subtotal $XXX.XX

PAID $XXX.XX

A confirmation email with order details has been sent to Carbonite.Customer@emailaddress.com

Renewing an Expired Account

If your subscription expires before you can renew it, you will have 30 days to do so before your data will be removed from our servers.

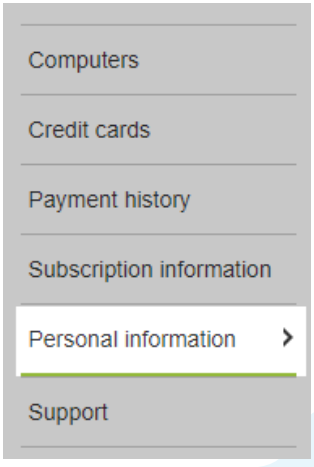
Log into your Carbonite account at account.carbonite.com.

Once logged in, click **Buy Now** or **Pay My Bill**, then follow the prompts to complete your order.

Updating Your Security Information

You can use your account to update your contact information, password, security phone number, and security questions at any time.

1. Log into your account at account.carbonite.com.
2. Click **Personal Information** in the menu on the left.



Your current personal information will be displayed on the screen. Click the **edit** link next to any of the headers to change the related information.

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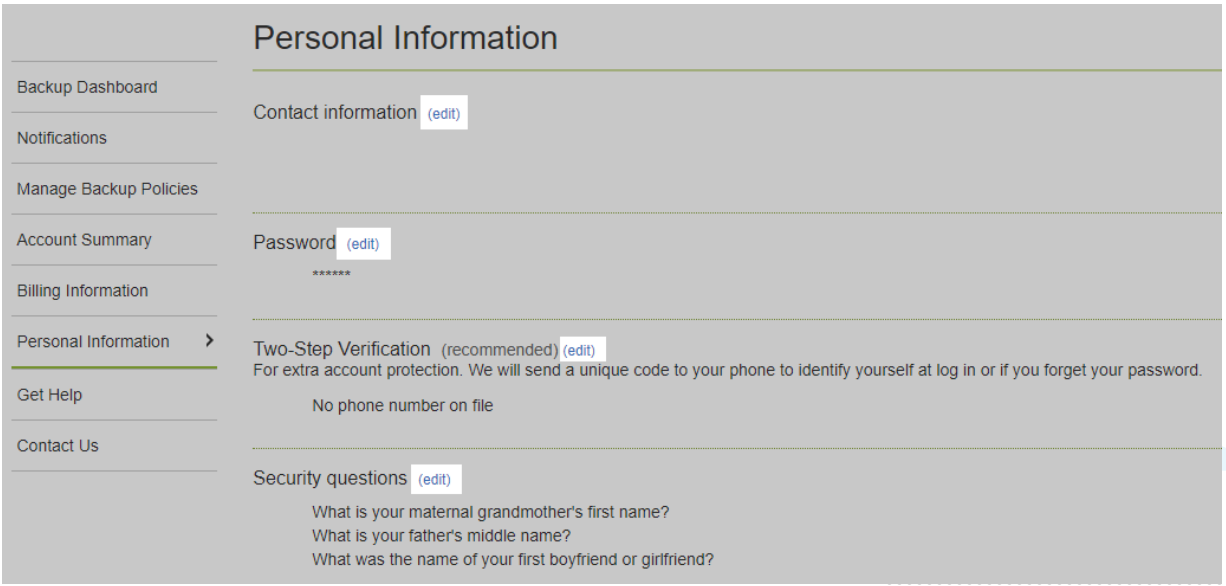
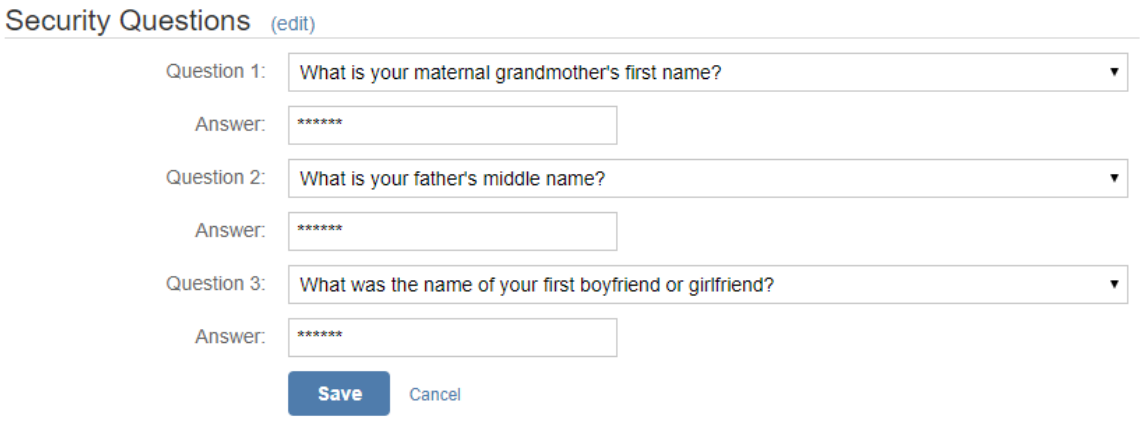


Updating Your Security Questions

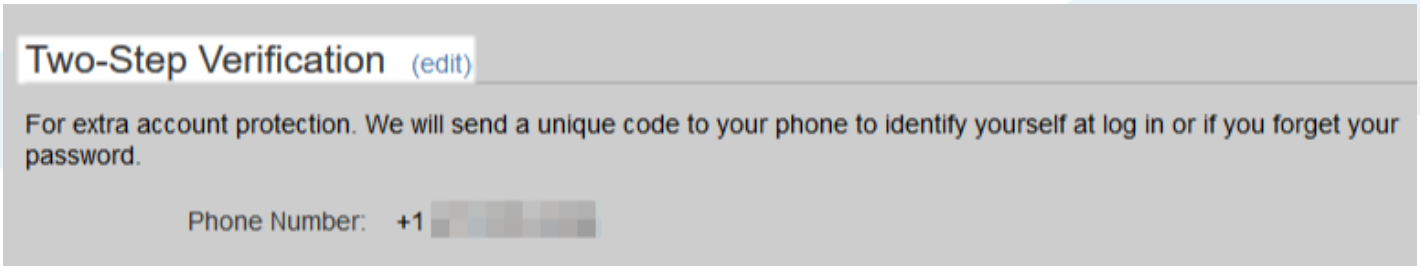
When editing your security questions, your three current questions will show and your answers will be masked. You can change the questions by clicking the dropdown menus and selecting a new question. Your updated answer will not be masked until you click **Save**.



Updating Your Two-Factor Verification Information

When updating your security phone, we will send you a confirmation code to that phone number, either by call or text message (your choice). Enter this code in the next popup to confirm your valid number.

1. Click **edit** next to *Two-Step Verification*.



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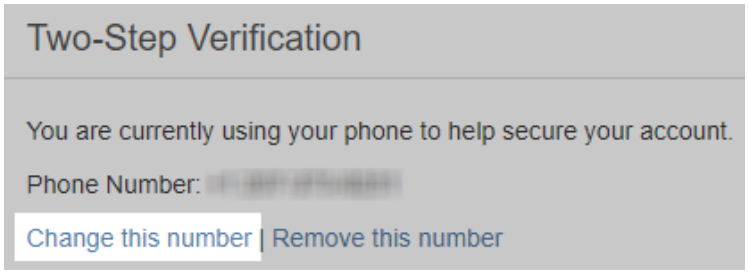
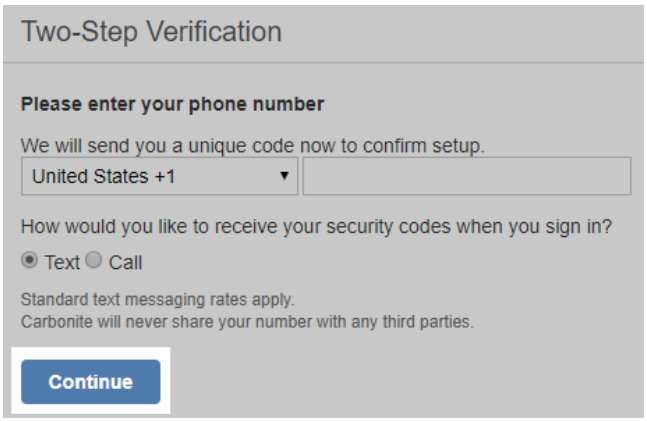
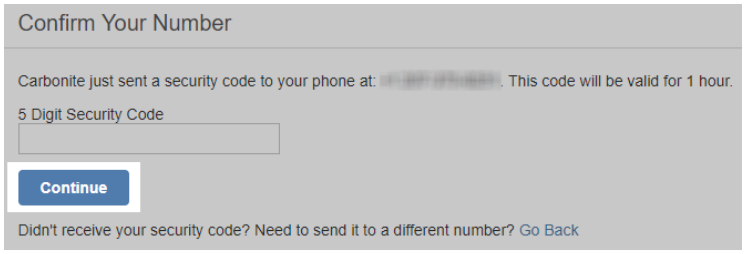
2. If you already have a phone number entered, you will see the following popup. Click **Change this number**.





3. Enter a new phone number and choose to receive a text or call with your verification code, then click **Continue**.

4. You'll receive a text message or voice call with a verification code. Enter that code in the next popup, then click **Continue**. If you entered the correct code, your security phone will be updated to the new number.



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Troubleshooting Common Issues

Installation Problems

There are a couple of settings that need to be in place for an installation to complete correctly. The most common causes for installation problems are either the Computer Name or security software. For detailed step-by-step instructions (including screenshots) to resolve these issues, click here.

Incomplete Install

If the installation did not complete, there are a few steps you can take to fix it.

1. First, use **Finder** to locate the Carbonite app package that was downloaded from our website. It is usually located in the *Downloads* folder.
2. Move the Carbonite app package from the *Downloads* folder to the *Macintosh HD/Applications* folder.
3. **Control + click** or **right-click** the Carbonite app in *Finder* and click **Show Package Contents** from the context menu. Another *Finder* window will open and display the contents of the Carbonite app package file
4. Double-click on the **CarboniteInstall** icon from the new *Finder* window.

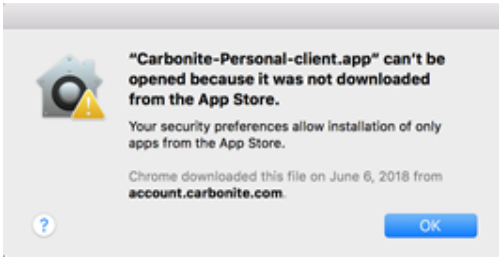
Carbonite will now install correctly. To see these instructions with screenshots, click here.

Computer Name

In order for Carbonite to install, your computer must have a Computer Name with no special characters or spaces. You can check and adjust your Computer Name in the Sharing section of your Mac's System Preferences.

Gatekeeper

The latest Mac OS X releases have a new security feature called Gatekeeper that may prevent the installation from running. You'll see an error that looks like this:



To run the installer, open **System Preferences**, then open **Security & Privacy**. Near the bottom of the *General* tab, click **Open Anyway**.

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Antivirus / Security Software

You may have antivirus or security software installed that is blocking the necessary components for Carbonite to function. Configure your security software to allow the following components full access:

- */Macintosh HD/Applications/Carbonite*

Stuck Backup Problems

If you think your backup appears to be moving slow or is stuck on a file, follow this checklist (in this order) to make sure none of these settings are the issue.

1. Your backup may seem stuck if your internet connection is slow. Check your Internet access speeds to determine whether your connection is fast enough to support data transference. If your connection is too slow, you may need to contact your Internet Service Provider. We also recommend checking the following:
    - Ensure your computer does not go to sleep or hibernate. Instructions for setting this can be found here.
    - If possible, switch from a Wi-Fi connection to a wired connection. If you are unable to do so, please ensure that your computer is as close to your wireless router as possible.
    - Ensure that you are not shutting the lid to your laptop.
    - Ensure that you're keeping your computer powered on and connected to the internet in order to upload as many files as possible.
2. Restart the computer to refresh system resources.
    - After restarting, it may take a few minutes for Carbonite to display backup activity.
3. Ensure that Carbonite is allowed through any firewall(s) or Anti-virus software.
4. Ensure that your hard drive is not full or close to being full.
    - If your hard drive is full or nearly full, please delete any non-critical data or empty your trash.
5. Power off your modem/router for 60 seconds and power it back on, then attempt another backup.

If none of these items fixed your stuck backup problem, please contact Customer Care for further investigation.

Stuck Restore Problems

You can check your restore progress from the Carbonite application. If it seems like your restore is stuck, it's possible that Carbonite is restoring a single large file. The Carbonite application displays the status of your restore as both a progress bar and a numerical counter that shows the number of files restored. Large files won't impact the progress bar or the counter until after they have been completely restored.

If you don't see progress after a significant amount of time, try closing and reopening the Carbonite application, ensure that you are connected to the Internet, and adjust your sleep and hibernation settings.

If your restore progress appears to be frozen and you are not able to do anything with the Carbonite application, you may need to force-quit *System Preferences* to refresh the pane. This may cause the status bar for the restore to reset to 0, but Carbonite will continue to restore only those files which haven't been restored yet. Files which have been restored will not be restored a second time. You can force-quit a program by pressing **Command-Option-ESC** on your keyboard.

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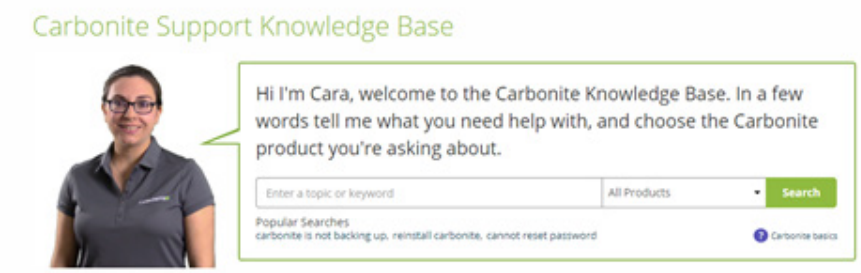
The Carbonite Knowledge Base

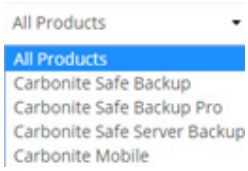
If you have a question about Carbonite that isn't covered in this handbook, our frequently-updated Knowledge Base contains information about every facet of Carbonite.

Carbonite Knowledge Base: https://support.carbonite.com

Searching the Knowledge Base

Our Carbonite Knowledge Base is available for you anytime you need. Simply go to support.carbonite.com, input a search term or question, and click **Search**.





You'll be provided with a list of short articles containing step-by-step instructions that you can follow at your own pace. We recommend using the dropdown filter above the Search Results to select the exact product you have *(see left)*. This will hide any articles that don't apply to the product you're using.

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