



salesforce

THE CUSTOMER SUCCESS PLATFORM

# Data Backup & Disaster Recovery Options

---

## Capability Awareness and Planning

Asit Sharma  
Senior Director  
Global Information Lead  
asit.sharma@salesforce.com

Sid Muzumdar  
Senior Director  
Global Integration Lead  
smuzumdar@salesforce.com

Suchin Rengan  
Director  
Enterprise Architecture Specialist  
srengan@salesforce.com

Patrick Beyries  
Director  
Product Management  
pbeyries@salesforce.com

# Forward Looking Statements

Safe harbor statement under the Private Securities Litigation Reform Act of 1995:

This presentation may contain forward-looking statements that involve risks, uncertainties, and assumptions. If any such uncertainties materialize or if any of the assumptions proves incorrect, the results of salesforce.com, inc. could differ materially from the results expressed or implied by the forward-looking statements we make. All statements other than statements of historical fact could be deemed forward-looking, including any projections of product or service availability, subscriber growth, earnings, revenues, or other financial items and any statements regarding strategies or plans of management for future operations, statements of belief, any statements concerning new, planned, or upgraded services or technology developments and customer contracts or use of our services.

The risks and uncertainties referred to above include – but are not limited to – risks associated with developing and delivering new functionality for our service, new products and services, our new business model, our past operating losses, possible fluctuations in our operating results and rate of growth, interruptions or delays in our Web hosting, breach of our security measures, the outcome of any litigation, risks associated with completed and any possible mergers and acquisitions, the immature market in which we operate, our relatively limited operating history, our ability to expand, retain, and motivate our employees and manage our growth, new releases of our service and successful customer deployment, our limited history reselling non-salesforce.com products, and utilization and selling to larger enterprise customers. Further information on potential factors that could affect the financial results of salesforce.com, inc. is included in our annual report on Form 10-K for the most recent fiscal year and in our quarterly report on Form 10-Q for the most recent fiscal quarter. These documents and others containing important disclosures are available on the SEC Filings section of the Investor Information section of our Web site.

Any unreleased services or features referenced in this or other presentations, press releases or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make the purchase decisions based upon features that are currently available. Salesforce.com, inc. assumes no obligation and does not intend to update these forward-looking statements.

# Focus



#1: What should customers consider?

#2: Data Backup Options

Org Sync Feature

Other Options

# Setting the Context

Why are we here today?

- Discuss Salesforce data backup and disaster recovery capabilities
- Understand Human-Process driven factors (e.g. user errors, malicious activity) that play a significant role in data loss
- Discuss the importance of a holistic approach to backup and disaster recovery in order to minimize and/or eliminate risks of data loss



# What should you consider?

---

# Backup needs to be a core Business Capability for enterprises

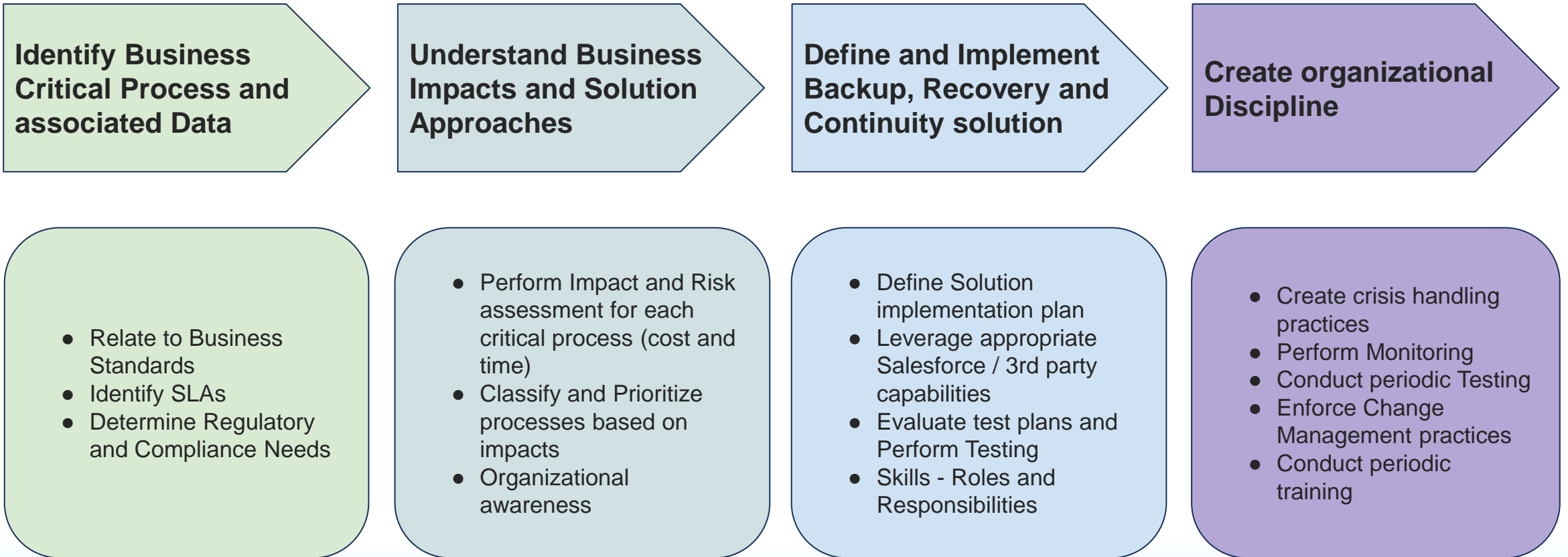
Why should you backup your Salesforce Data & Metadata?

Reason	Potential Approaches
Data Governance	Define data backup and recovery needs, establish policies & standards, monitor
High Availability	Backup, recovery and continuity of business operations to prevent outages
Regulatory Compliance	Backup of data to appropriate storage tier in line with retention and compliance policy
Service Level Agreements	Periodic Archival to 2nd tier storage to alleviate performance impacts due to large data volumes
Business Operations	Backup strategy to ensure business context with enterprise applications is preserved (synchronization, integration)
Business Intelligence/ Analytics	Periodic backup to data warehouse to prevent loss of data

***Establish a robust Disaster Recovery Plan that includes Salesforce as part of your enterprise backup/recovery strategy***

# Driving an effective Backup, Recovery and Continuity Strategy

What do you need to evaluate?



# Data Backup Options

---



# Typical Backup Options

You can create full, incremental or partial backups of your data and metadata

## Native Offerings

- Org Sync
- Data Loader
- Salesforce APIs - Metadata API, SOAP API, Bulk API
- Data Export
- Full Sandbox Copy
- S2S

## Platform Aware Offerings

- Heroku Connect
- AppExchange products
  - Backupify
  - Spanning (EMC)
  - Odaseva
  - OwnBackup
  - ...

## 3rd Party Offerings

- Data integration vendor tools (e.g. ETL, Middleware)
  - Informatica
  - Jitterbit
  - Cast Iron
  - ...

# Know your backup options

Option	What It's For	When to Use It	Limitations
<b>Data Export Service</b>	Customers can generate backup files of their data on a weekly or monthly basis depending on their edition. It can export all your organization's data into a set of comma-separated values (CSV) files.	Well suited for backing up data on a regular scheduled basis. Good option for smaller organizations. To export data on an adhoc basis.	<ul style="list-style-type: none"><li>- Does not include Metadata</li><li>- Heavy Traffic can delay export delivery</li></ul>
<b>Salesforce APIs</b>	Moving your organization's data and/or metadata to and from Salesforce. Customers can move data and metadata to either a 3rd party application or another Salesforce org.	You have pre-existing enterprise software or middleware services for backing up critical data. Well suited for customers who have data warehouses, analytics/BI solutions, enterprise source control systems etc. You have over a million records to process and speed is a requirement.	<ul style="list-style-type: none"><li>- Salesforce has governor limits for all APIs</li><li>- Customer has to develop functionality to replicate / backup data &amp; metadata using APIs</li><li>- Bulk API Support</li></ul>
<b>Full Sandbox Copy</b>	A Full Sandbox is an environment with a replica of your entire production org and all its data. Record IDs from production are preserved.	Good option for taking a snapshot of production on a one-off basis. Consider this for pre-planned events.	<ul style="list-style-type: none"><li>- Can only refresh full sandbox once every 30 days</li></ul>
<b>Org Sync</b>	With Organization Sync, you can set up a secondary, synced Salesforce organization where users can work on your most business-critical processes and data whenever your primary organization is experiencing downtime or maintenance.	Organization Sync is ideal for companies whose users need access to Salesforce at all times. When the primary organization is down for maintenance, users are redirected to the secondary organization until the maintenance is complete. All actions (creating a case, deleting an attachment, and more) that users perform in one organization are automatically applied to the other organization.	<ul style="list-style-type: none"><li>- Subset of data and business processes</li><li>- Initial setup and ongoing maintenance</li></ul>

# Know your backup options (contd.)

Option	What It's For	When to Use It	Limitations
<b>Heroku Connect</b>	Cloud Based Service to move data to and from Salesforce to Heroku (Postgres). Using bi-directional synchronization between Salesforce and Heroku Postgres, Heroku Connect unifies the data in your Postgres database with the contacts, accounts and other custom objects in the Salesforce database.	Does not count against API limits so this is a good option for high velocity changes.  Good option for consolidating data across multiple Salesforce Orgs for analytics, backup etc.	- Heroku Connect does not support in-flight transformations.
<b>3rd party data integration tools such as Informatica, Jitterbit, Cast Iron with Salesforce API support</b>	Mature data integration tools that support a wide range of database platforms, temporal requirements, large data volumes, and in-flight data transformations. These tools are well established in the traditional data integration space and now being adapted for cloud integration use cases.	Tools provide a lot of flexibility by way of customization. Can support high velocity as well high volume, batch changes. Robust CDC capabilities with ability to support in-flight transformations. Ideal for moving large volumes of data, consolidating data from multiple sources, and complex transformations. Typically do not count against API limits	- Requires specialized developer skills. Support for new Salesforce APIs may not be immediately available
<b>Platform Aware AppExchange Products</b>	These offerings support automated backup of every standard and custom object in customer's Salesforce database including accounts, leads, contacts, files, Chatter messages, and metadata	Tools provide a high degree of automation and are easily configurable with robust SF API support. Typically, can support multiple Salesforce environments	- Some offerings are constrained by API limits. Very minimal transformation support

Thank you

# Additional Resources

- Force.com Metadata API Deployment Tools Options (from Salesforce): [https://developer.salesforce.com/trailhead/en/alm\\_deployment/alm\\_tools](https://developer.salesforce.com/trailhead/en/alm_deployment/alm_tools)
- Salesforce Backup and Restore Essentials Part 1: [https://developer.salesforce.com/page/Salesforce\\_Backup\\_and\\_Restore\\_Essentials\\_Part\\_1](https://developer.salesforce.com/page/Salesforce_Backup_and_Restore_Essentials_Part_1)
- Salesforce Backup and Restore Essentials Part 2: [https://developer.salesforce.com/page/Salesforce\\_Backup\\_and\\_Restore\\_Essentials\\_Part\\_2](https://developer.salesforce.com/page/Salesforce_Backup_and_Restore_Essentials_Part_2)
- Backup & Restore Help & Training Article: <http://help.salesforce.com/HTViewSolution?id=000213366>
- Data Recover Service: [https://help.salesforce.com/apex/HTViewSolution?urlname=Data-Recovery-Service-and-Cost&language=en\\_US](https://help.salesforce.com/apex/HTViewSolution?urlname=Data-Recovery-Service-and-Cost&language=en_US)
- High Level Steps to Retrieve Deleted Data: [https://help.salesforce.com/apex/HTViewSolution?urlname=How-to-retrieve-my-records-and-data-that-has-been-lost-or-deleted-1327108681812&language=en\\_US](https://help.salesforce.com/apex/HTViewSolution?urlname=How-to-retrieve-my-records-and-data-that-has-been-lost-or-deleted-1327108681812&language=en_US)



**CIRCLES of SUCCESS**  
small group clinics

Group clinics focused on key adoption-related topics and challenges. These sessions are live, interactive, unscripted, and consultative in nature. They are facilitated and moderated by Salesforce's Customer Success experts.

Register for: [Create and Manage a Data Backup & Disaster Recovery Plan](#)