

Setting up a Backup User for BackupAssist 365

This is our current recommended procedure to back up Mailboxes (Exchange), SharePoint Documents and OneDrive for Business in Microsoft 365 (Office 365) using a single login.

It is recommended that you create a special “backup user” login in Microsoft 365 and use it in BackupAssist 365.

This is preferred because:

- Better security – the backup user can be assigned a special complex password that is only used in BackupAssist 365 and is never given to users.
- No licence is required for the backup user – therefore it won’t cost anything.

A full discussion on the advantages of this is available at our [blog article](#). This document gives you the “HOW TO” steps.

If the above hyperlink does not work, manually paste this URL into your browser:

<https://www.backupassist.com/blog/why-use-a-dedicated-backup-user-login-for-backing-up-microsoft-365-and-office-365>

How to set up the backup user account

Follow these instructions:

Step 1: Log into Office 365 as the administrator for your tenant. **Create a new user** in Office 365, as shown in the screenshot below. You can call the user anything you want, but we recommend something that will be easy to remember.

- a) Create a password at the time of setting up this user.
- b) Make sure both checkboxes at the bottom are unchecked. If you require the user to change the password, BA365 will be unable to login.



Add user

- Basics
- Product licenses
- Optional settings
- Finish

Set up the basics

To get started, fill out some basic information about who you're adding as a user.

First name
Backup

Last name
User

Display name *
Backup User

Username *
backup.user @ cortexcyber.com

Password settings

☐ Auto-generate password

☒ Let me create the password

Password *
[Masked Password] Strong

☐ Require this user to change their password when they first sign in

☐ Send password in email upon completion

Creating a backup user for backing up mailboxes in Office 365

2. Create the user without a license. This is so you don't have to pay for an unnecessary license.

Add user

- Basics
- Product licenses
- Optional settings
- Finish

Assign product licenses

Assign the licenses you'd like this user to have.

Select location *
United States

Licenses (0) *

☐ Assign user a product license

☐ Office 365 E3
79 of 100 licenses available

☒ Create user without product license (not recommended)
They may have limited or no access to Office 365 until you assign a product license.

Apps (0)

No product licenses are needed for this backup user

3. Set the roles to include permissions depending on what you want to back up.

To back up	Roles required
Exchange mailboxes (user + shared)	Exchange Administrator
SharePoint	SharePoint Administrator + Application Administrator
OneDrive for Business	

Add user

✓ Basics

✓ Product licenses

Optional settings

Finish

Optional settings

You can choose what role you'd like to assign for this user, and fill in additional profile information.

Roles

Admin roles allow people to take action in admin center. Global admins have all admin permissions for all products and services, while custom admins only have the permissions you choose. To reduce risk to your organization, limit the number of global admins and assign limited admin roles instead.
[Learn more about admin roles](#)

☐ User (no administrator access) ⓘ

Global admin

You should have at least two global admins in your organization, in case you need to reset another global admin's account. For all other admins, assign them limited admin roles.

☐ Global administrator ⓘ

Users and groups

☐ Helpdesk administrator ⓘ

☐ Service administrator ⓘ

☐ User management administrator ⓘ

Billing

☐ Billing administrator ⓘ

Common specialist roles

☒ Exchange administrator ⓘ

☐ SharePoint administrator ⓘ

☐ Teams Service Administrator ⓘ

[Show all](#)

Profile info

Adding privileges for the backup user



4. Confirm the settings as shown

Confirm these settings

Sometimes changing permissions on the backup user can usually take 10-15 minutes to propagate. So if you receive permissions problems in BackupAssist 365, we recommend waiting a few minutes and trying again.

Propagating permissions changes to SharePoint seems to be slowest of all – we once saw it take some 20 hours, although this is not typical.

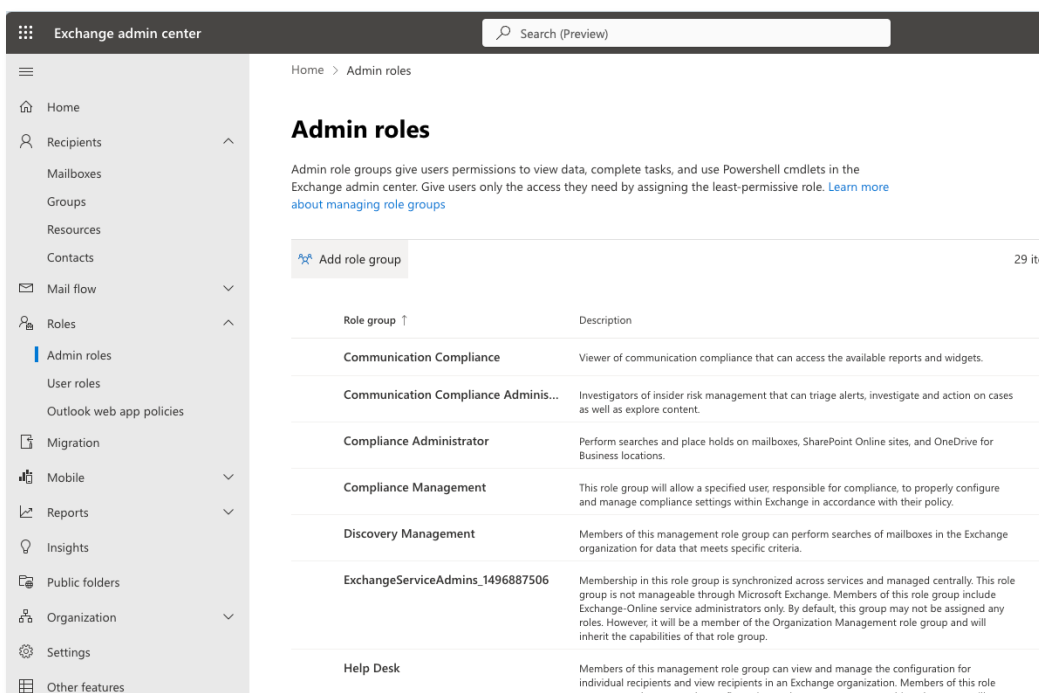
Congratulations – you can now use this logon identity in BackupAssist 365 for OneDrive for Business and SharePoint, but further steps are required for Exchange mailbox backups.

Additional steps for Exchange Mailbox backups

Commencing in August 2023, Microsoft made changes to the security model in Exchange, and one further set of steps is required.

These steps can be followed for both new users of BackupAssist 365, and existing users.

1. Go to the Exchange Admin center - <https://admin.exchange.microsoft.com>
2. Navigate to Roles > Admin roles, and click Add role group.



3. Give the group a name. We recommend “BA365 Impersonation” but the name won’t make any difference to functionality.

4. In the next step, select the ApplicationImpersonation permission, as shown below.

Admin Roles > Add role group

- Basics
- Permission**
- Admins
- Review and finish

<input type="checkbox"/>	Application Mail.ReadWrite	Allows the app to create, read, update, and delete email in all mailboxes without a signed-in user. Does not include permission to send mail	Organization	None
<input type="checkbox"/>	Application Mail.Send	Allows the app to send mail as any user without a signed-in user	Organization	None
<input type="checkbox"/>	Application MailboxSettin...	Allows the app to read user's mailbox settings in all mailboxes without a signed-in user	Organization	None
<input type="checkbox"/>	Application MailboxSettin...	Allows the app to create, read, update, and delete user's mailbox settings in all mailboxes without a signed-in user	Organization	None
<input checked="" type="checkbox"/>	ApplicationImpersonation	This role enables applications to impersonate users in an organization in order to perform tasks on behalf of the user.	Organization	None

5. In the next step, add the same backup user login that you just created.

Admin Roles > Add role group

- Basics
- Permission
- Admins**
- Review and finish

Assign admins

Select the users to assign to this role group. They'll have permissions to manage the roles that you assigned in the previous step.

Members

Search by name or email address

Backup User Brisbane X

6. Proceed to the end of the wizard, and your role group will now be ready.

Admin Roles > Add role group

- Basics
- Permission
- Admins
- Review and finish**

Status

BA365 Impersonation role group has been added.

Related features

[View this role group](#)

[Add another role group](#)

Note: do you need to back up Public Folders?

Only a licensed user can access Public Folders. Therefore there are two options:

1. Assign an Exchange license to the backup user – but this may incur extra costs if you have to purchase an extra license
2. Use a regular user login for Public Folders.

If you choose Option #2, we recommend that you set up an additional task to only back up the Public Folders in that task.