

# 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 <u>blog article</u>. 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.



Basics	Set up the basics
Product licenses	To get started, fill out some basic information about who you're adding as a user.
Optional settings	First name Last name
	Backup User
<ul> <li>Finish</li> </ul>	Display name *
	Backup User
	Username * backup.user 0 cortexcyber.com
	Password settings
	O Auto-generate password
	Let me create the password
	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.

Basics	Assign product licenses
Product licenses	Assign the licenses you'd like this user to have.
Optional settings	Select location *
<ul> <li>Finish</li> </ul>	United States $\checkmark$
	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		

	Optional settings		
Product licenses	You can choose what role you'd like to assign for this user, and fill in additional profile information.		
Optional settings			
	Roles		
Finish	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 (i)		
	Billing		
	Billing administrator		
	Common specialist roles		
	✓ Exchange administrator <sup>(i)</sup>		
	SharePoint administrator		
	Teams Service Administrator		
	Show all		
	Profile info		

Adding privileges for the backup user



#### 4. Confirm the settings as shown

Basics	You're almost done - review and finish adding
Product licenses	Assigned Settings
	Review all the info and settings for this user before you finish adding them.
<ul> <li>Optional settings</li> </ul>	Review an the into and settings for this user before you mish adding them.
	Display and username
<b>Finish</b>	Backup User
	backup.user@cortexcyber.com
	Edit
	Password
	Type: Custom password
	Edit
	Product licenses
	Create user without product license.
	Edit
	Roles
	Exchange administrator
	Edit

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.

	Exchange admin center		>> Search (P	review)	
=			Home > Admin roles		
ŵ	Home				
8	Recipients	^	Admin roles	Admin roles	
	Mailboxes			Admin role groups give users permissions to view data, complete tasks, and use Powershell cmdlets in the Exchange admin center. Give users only the access they need by assigning the least-permissive role. Learn more	
	Groups		about managing role groups	ney need by assigning the least permissive role. Lean more	
	Resources				
	Contacts		የድ Add role group	29 ite	
	Mail flow	$\sim$			
Re	Roles	^	Role group $\uparrow$	Description	
1	Admin roles		Communication Compliance	Viewer of communication compliance that can access the available reports and widgets.	
	User roles Outlook web app policies		Communication Compliance Adminis	Investigators of insider risk management that can triage alerts, investigate and action on cases as well as explore content.	
G	Migration		Compliance Administrator	Perform searches and place holds on mailboxes, SharePoint Online sites, and OneDrive for Business locations.	
ji L	Mobile	$\sim$	Compliance Management	This role group will allow a specified user, responsible for compliance, to properly configure and manage compliance settings within Exchange in accordance with their policy.	
	Reports	~	Discovery Management	Members of this management role group can perform searches of mailboxes in the Exchange	
8	Insights			organization for data that meets specific criteria.	
C2	Public folders		ExchangeServiceAdmins_1496887506	Membership in this role group is synchronized across services and managed centrally. This role group is not manageable through Microsoft Exchange. Members of this role group include	
4	Organization	$\sim$		Exchange-Online service administrators only. By default, this group may not be assigned any roles. However, it will be a member of the Organization Management role group and will inherit the capabilities of that role group.	
\$	Settings		Help Desk	Members of this management role group can view and manage the configuration for	
⊞	Other features		пер безк	individual recipients and view recipients in an Exchange organization. Members of this role	

3. Give the group a name. We recommend "BA365 Impersonation" but the name won't make any difference to functionality.

Basics	
) Permission	Set up the basics
) Admins	-
) Review and finish	To get started, fill out some basic information about the role group that you're creating.
	Name *
	BA365 Impersonation
	Description
	Allow BackupAssist 365 to back up mailboxes
	Write scope ()
	Default V



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

Admin Roles > Add role group				
✔ Basics		body, previewBody, attachments, and any extended properties in all mailboxes without a signed-in user		
Permission	Application Mail.R	LeadWrite 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
Admins	Application Mail.S	end Allows the app to send mail as any user without a signed-in user	Organization	None
<ul> <li>Review and finish</li> </ul>	Application Mailbo	oxSettin Allows the app to read user's mailbox settings in all mailboxes without a signed- in user	Organization	None
	Application Mailb	oxSettin Allows the app to create, read, update, and delete user's mailbox settings in all mailboxes without a signed-in user	Organization	None
	ApplicationImpers	conation 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.

Basics	
Permission	Assign admins
Admins	
Review and finish	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
	BB Backup User Brisbane 🛛 🗙

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

Admin Roles > Add role group					
Basics	Status				
Permission	Ø BA365 Impersonation role group has been added.				
<ul> <li>Admins</li> <li>Review and finish</li> </ul>	<b>Related features</b> 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.