



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.

The screenshot shows the 'Add user' interface with the 'Set up the basics' step active. The left sidebar shows a progress indicator with 'Basics' selected. The main content area includes fields for 'First name' (Backup), 'Last name' (User), 'Display name' (Backup User), and 'Username' (backup.user@ cortexcyber.com). Under 'Password settings', 'Let me create the password' is selected, and a password field shows a strength indicator of 'Strong'. There are also checkboxes for 'Require this user to change their password when they first sign in' and '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.

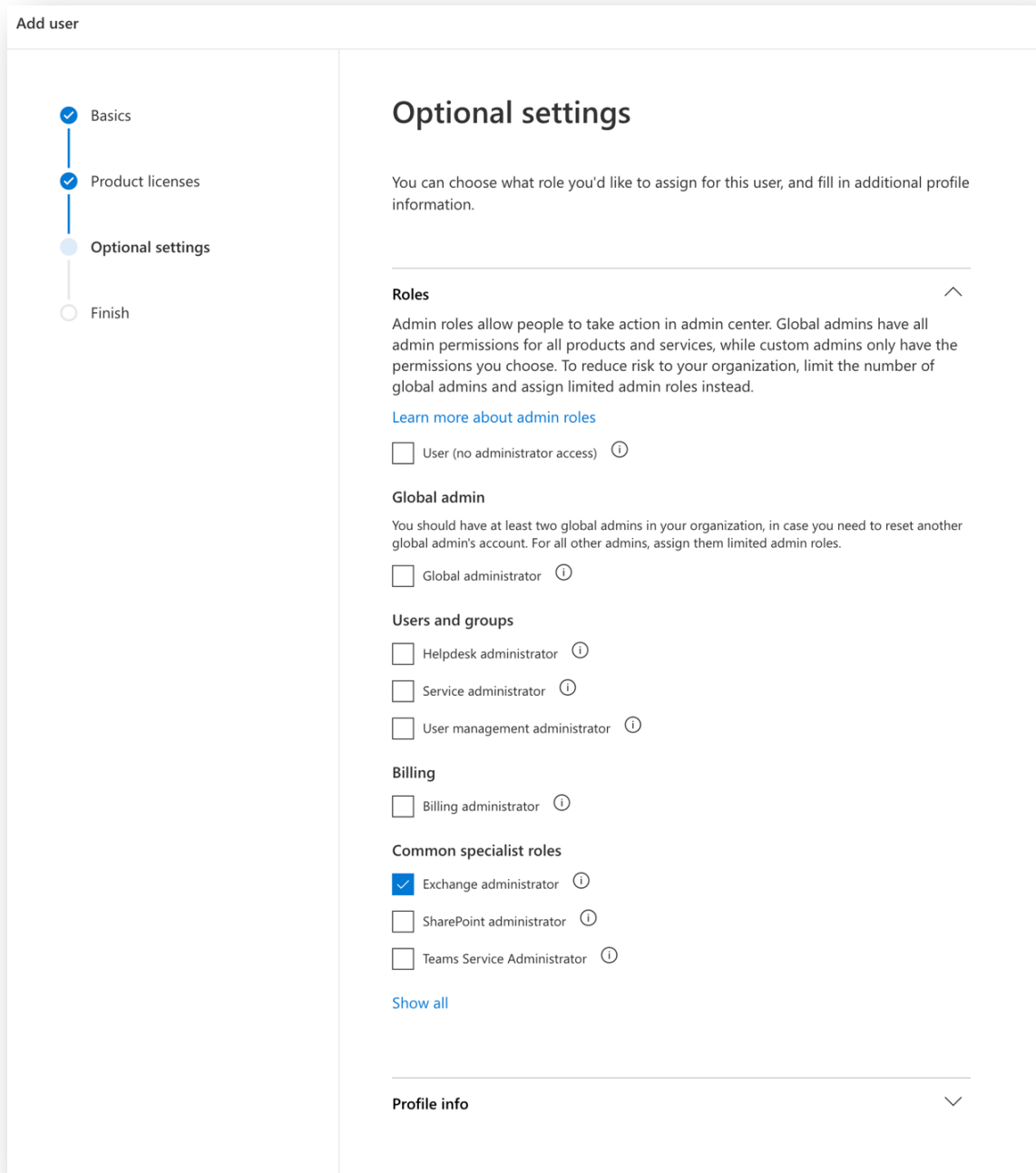
The screenshot shows the 'Add user' interface with the 'Assign product licenses' step active. The left sidebar shows a progress indicator with 'Basics' checked and 'Product licenses' selected. The main content area includes a 'Select location' dropdown set to 'United States'. Under 'Licenses (0)', the option 'Create user without product license (not recommended)' is selected, with a note: 'They may have limited or no access to Office 365 until you assign a product license.' There is also an option for 'Office 365 E3' with '79 of 100 licenses available'. An 'Apps (0)' section is also visible at the bottom.

No product licenses are needed for this backup user



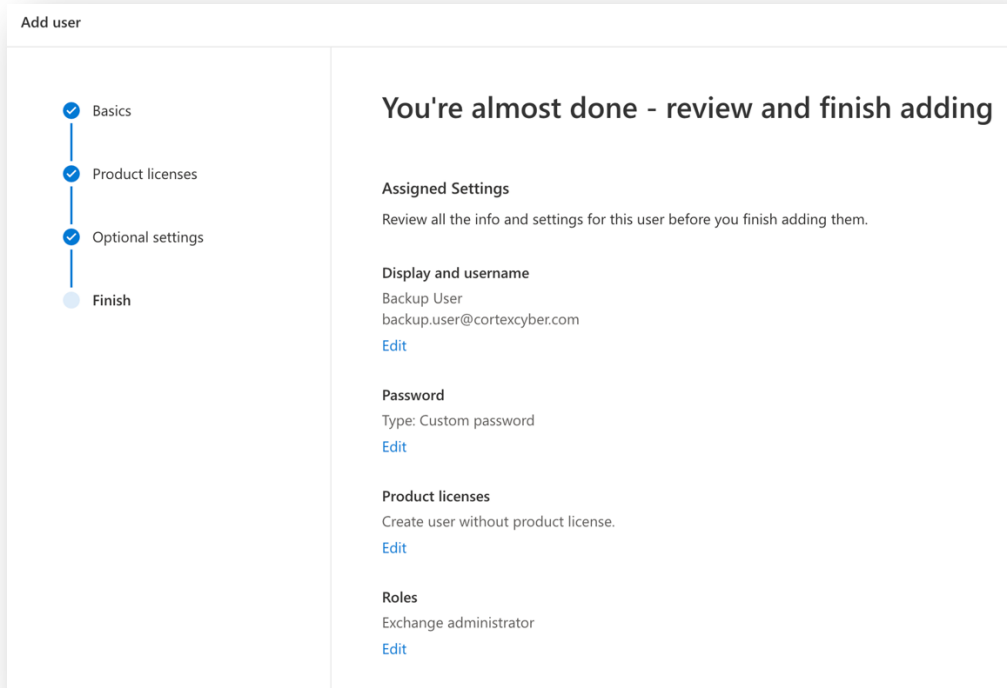
3. Set the roles to include permissions depending on what you want to back up.

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



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.



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.