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 Office 365 using a single login.

It is possible to create a special "backup user" login in Office 365 and use that to log in for the backup task to back up data out of a tenant.

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.

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.

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.

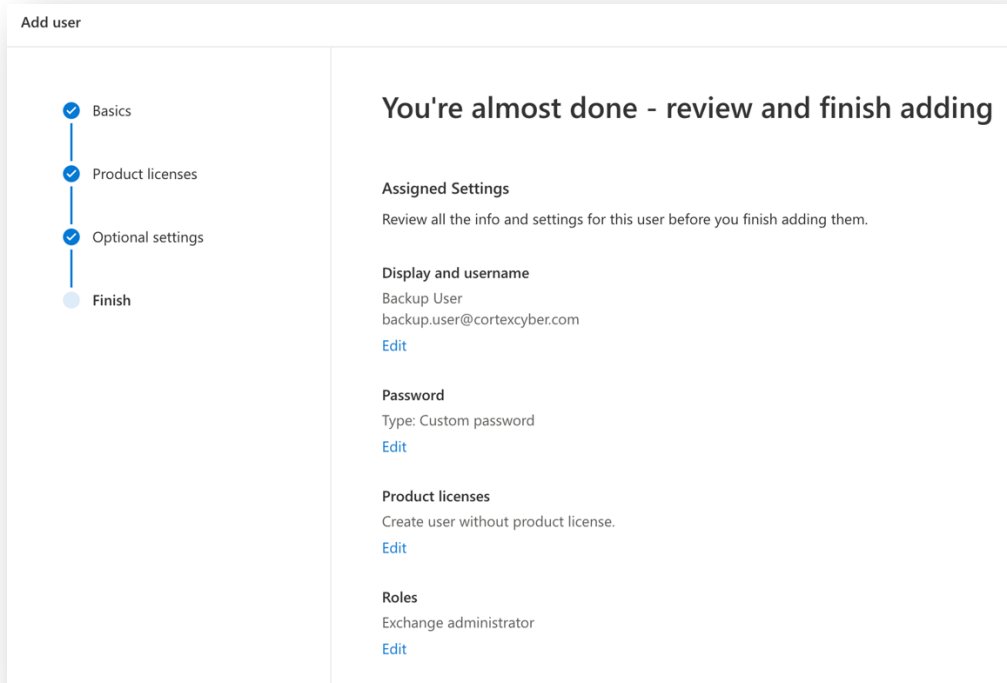No product licenses are needed for this backup user

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	
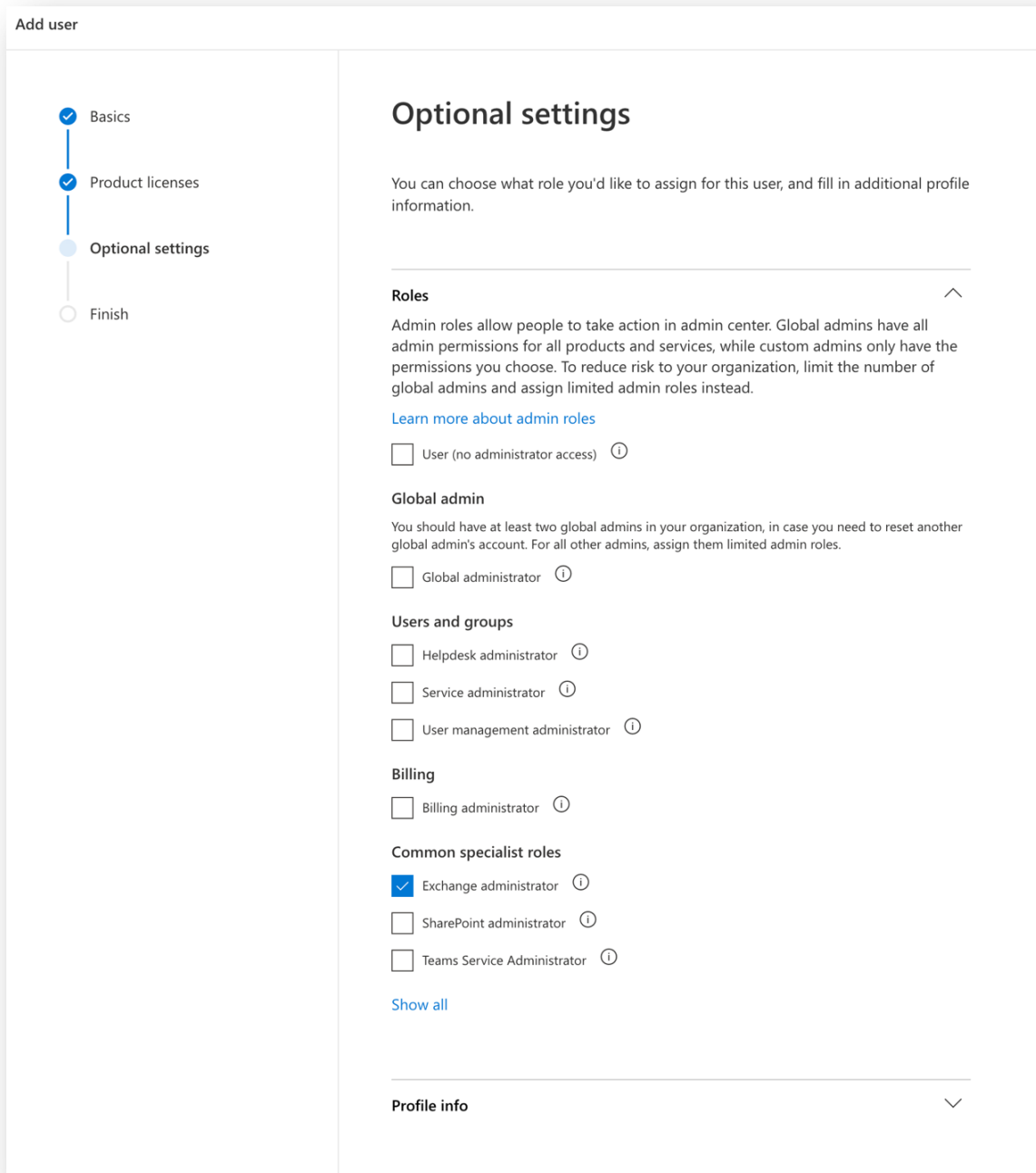
Adding privileges for the backup user

4. Confirm the settings as shown

Confirm these settings

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

Congratulations – you can now use this logon identity in BackupAssist 365.

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. Set up an additional task to only back up the Public Folders, and log in as a licensed user for that task.

Additional steps for SharePoint

1. Additional steps for SharePoint – add your backup user to the "Visitors" group for each SharePoint site you want to back up