

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.

The screenshot shows the 'Add user' wizard in the 'Set up the basics' step. The left sidebar has four steps: Basics (selected), Product licenses, Optional settings, and Finish. The main content area includes the following fields and options:

- 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] 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.

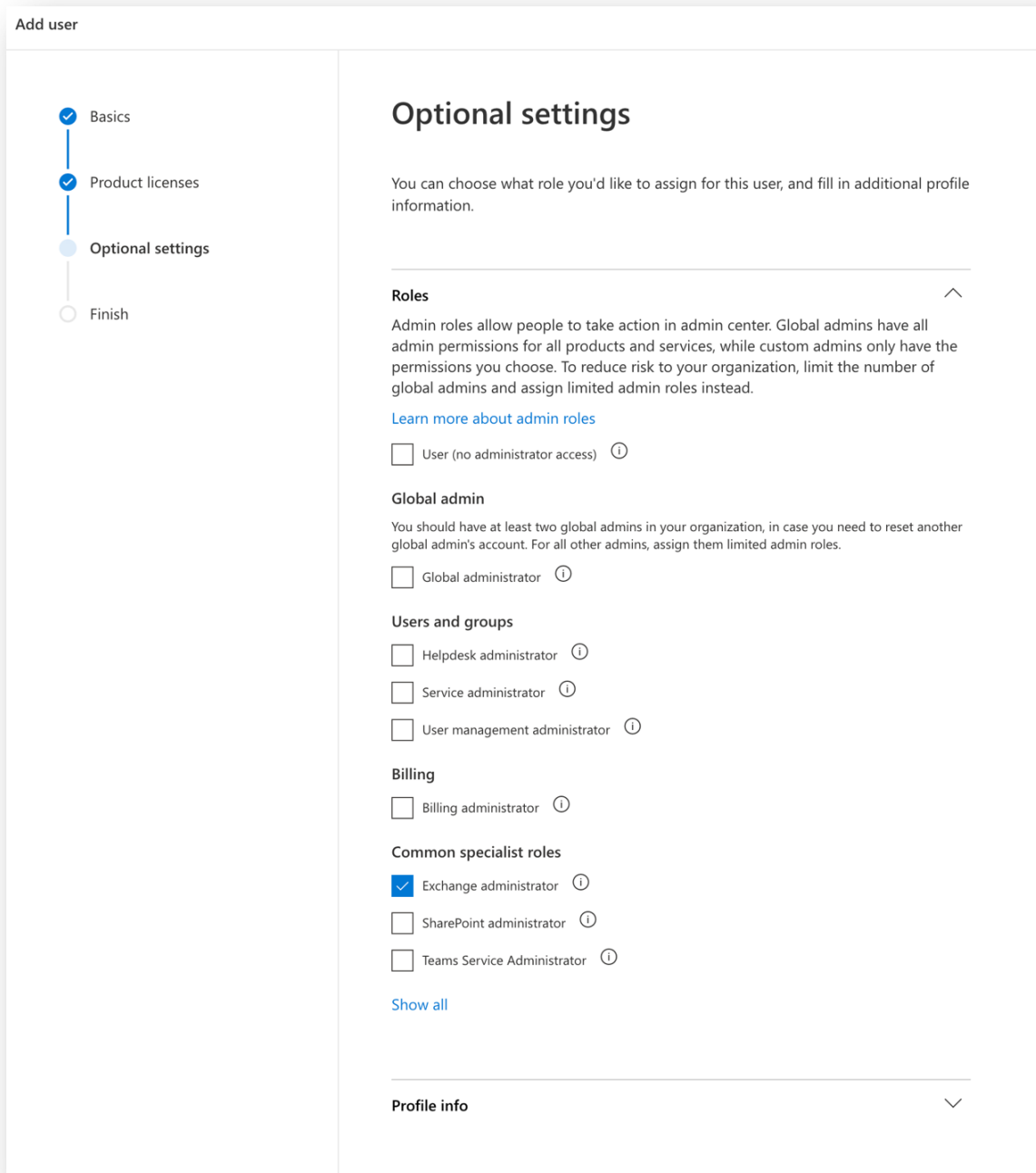
The screenshot shows the 'Add user' wizard in the 'Assign product licenses' step. The left sidebar has four steps: Basics, Product licenses (selected), Optional settings, and Finish. The main content area includes the following fields and options:

- 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):** [dropdown arrow]

No product licenses are needed for this backup user

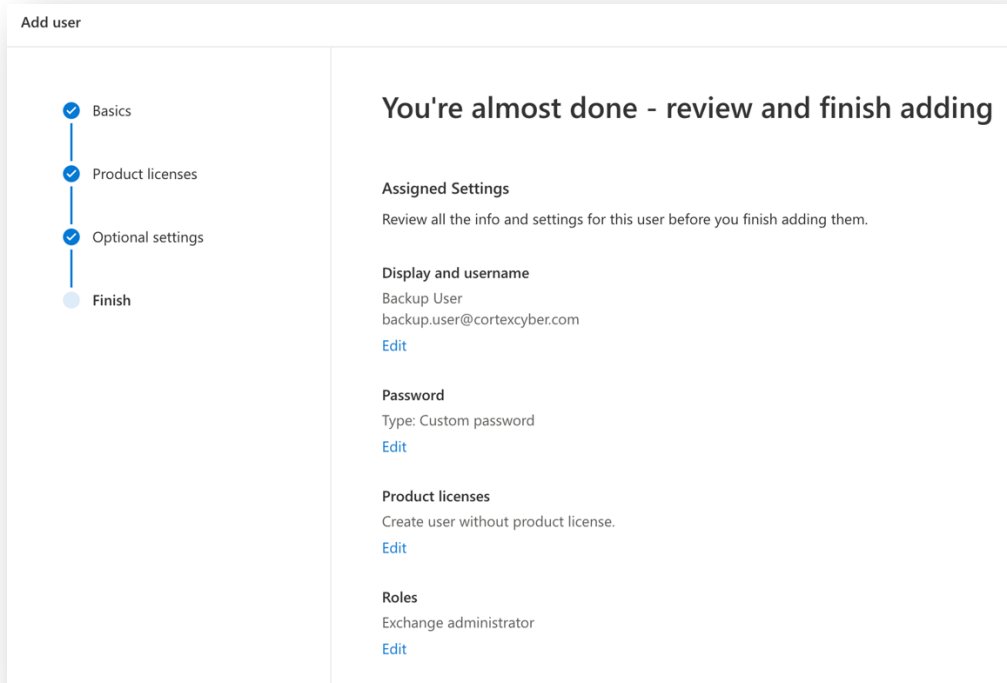
3. Set the roles to include permissions depending on what you want to back up.

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



Add user

- Basics
- Product licenses
- Optional settings
- Finish

You're almost done - review and finish adding

Assigned Settings
Review all the info and settings for this user before you finish adding them.

Display and username
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 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