Microsoft 365

SETUP GUIDE

PRO Account

March 2024
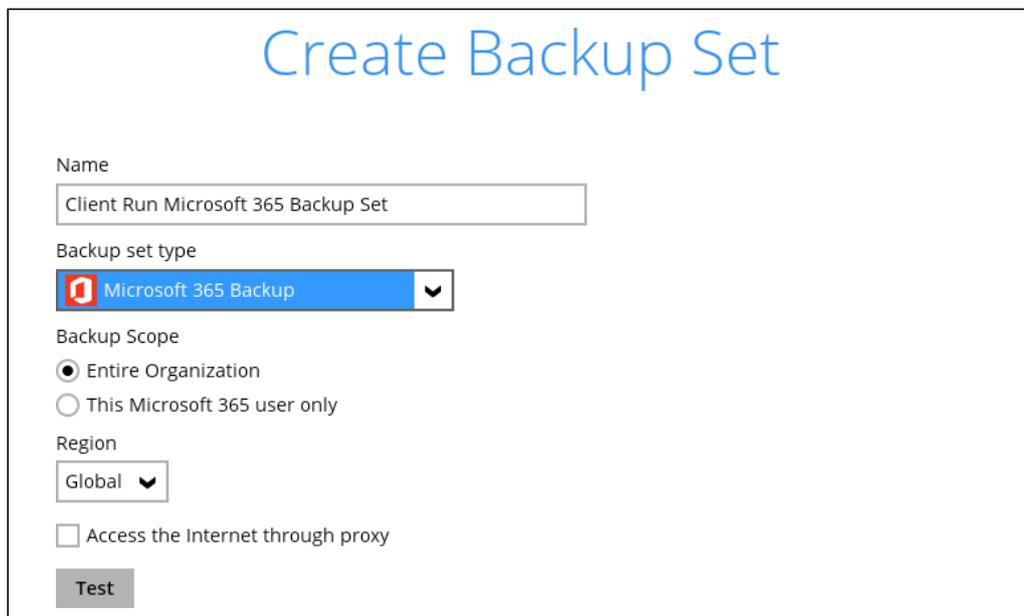
Table of Contents

1. Creating a Microsoft 365 Backup Set

To use this feature, create a PRO account via your portal. Once downloaded and logged in, go to the client and the middle **Backup Sets** Box. If you have an existing LITE account and want to use this feature, contact us so we can convert it to a PRO account.

- Click the "+" icon next to Add new backup set, then Create a Microsoft 365 Backup Set from the Menu. Enter a Name for your backup set and select Microsoft 365 Backup as the Backup set type. If you have more than 100 mailboxes to backup, then create different backup sets per 100 to ensure the performance is optimized.

- Ensure the machine (min 8GB RAM) is on at the time of the scheduled backup. The machine is there to start the backups for that Microsoft 365 tenant and must be on till it finishes. Once the master backup is done, it's just the incrementals changes so the backup time will be less and it can start at any time.

- Check the Discovery Management (page 11) and Public Folders permissions

Create Backup Set

Name

Client Run Microsoft 365 Backup Set

Backup set type

Microsoft 365 Backup

Backup Scope

◉ Entire Organization
○ This Microsoft 365 user only

Region

Global

☐ Access the Internet through proxy

Test

Tick the Access the Internet through proxy checkbox (if needed) and click test**.**

- Click **Authorize** to start the authentication process.

Click [Authorize] and in the pop-up browser window, sign in your Microsoft account and authorize the backup application (if necessary), copy and paste the authorization code to the textbox and hit [OK] to complete the authentication.

Authorize   Cancel

NOTE

Verification code is only required if the MFA status of a Microsoft 365 account is enforced.

Cloud Backup PRO
Cloud to Cloud Backups

Authorization Code for Microsoft 365

0.Aa4Amp-0pRwiWk2fl1DfZk6jIK8Tm_VFpzdDoqJ4YbL(

Please copy and paste the above Authorization Code
into the Backup Client to complete the setup.

In the pop-up browser window, sign in your Microsoft account and
authorize the backup application (if necessary), copy and paste the
authorization code to the textbox and hit [OK] to complete the
authentication.

62cmWkJCrmpTk7NxE4u7gFmpwiguI6mEJueYlhcqT9ojjCoh8J7wiOZc43IAA

OK   Cancel

Test completed successfully shows when the validation is successful. Click **Next** to
proceed to the next step.

Create Backup Set

Name

Client Run Microsoft 365 Backup Set

Backup set type

Microsoft 365 Backup ▾

Backup Scope

◉ Entire Organization
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Global ▾

☐ Access the Internet through proxy

✓ Test completed successfully

Next   Cancel   Help

- The Backup Source window that will be displayed will depend on the backup scope selected; either Entire Organization or This Microsoft 365 User Only.

- If Entire Organization is selected, this will be the window displayed. Select the users and data type for backup.

- Follow the steps for destination, schedule and encryption key that appears.

- If you are creating a new schedule instead of the default one already there, ensure the run retention policy after backup is ticked.

2. Microsoft 365 License Requirements

● **Microsoft 365 Subscription Plan**

The following subscription plans with Microsoft 365 are supported for backup:

Microsoft 365 Business	Microsoft 365 Business Essentials
Microsoft 365 Business Premium	Microsoft 365 Enterprise E1
Microsoft 365 Enterprise E3	Microsoft 365 Enterprise E4
Microsoft 365 Enterprise E5	Microsoft 365 Education

● **Microsoft 365 Subscription Status**

Make sure your Microsoft 365 subscription with Microsoft is active, if your account has expired, renew it with Microsoft as soon as possible. When your account is expired, depending on your role, certain access restrictions will be applied to your account.

● **Restore Requirement**

When restoring data of a Microsoft 365 user, the account which the data will be restored to requires valid license(s):

◉ Requires Exchange License

Example: Exchange Online Plan and Microsoft 365 E3 are required when restoring Outlook's / Public Folder's items.

◉ Requires SharePoint License

Example: SharePoint Online Plan and Microsoft 365 E3 are required when restoring OneDrive's / Personal Site's items.

3. Microsoft 365 Permission Requirements

The basic permissions required by a Microsoft user account for authentication of a Microsoft 365 backup set are as follows, please refer to this section to look at how to assign roles.

- **Global Admin Role**

  The Microsoft 365 account used for authentication must have Global Admin Role, since Modern Authentication will be used.

  This is to ensure that the authorization configuration requirements will be fulfilled (e.g. connect to Microsoft Azure AD to obtain the App Access Token).

- **Term Store Administrator Role**

  The Term Store Administrator Role may be required for backup and restore of SharePoint items.

- A member of **Discovery Management** security group

  The **Discovery Management** security group must be assigned the following roles.
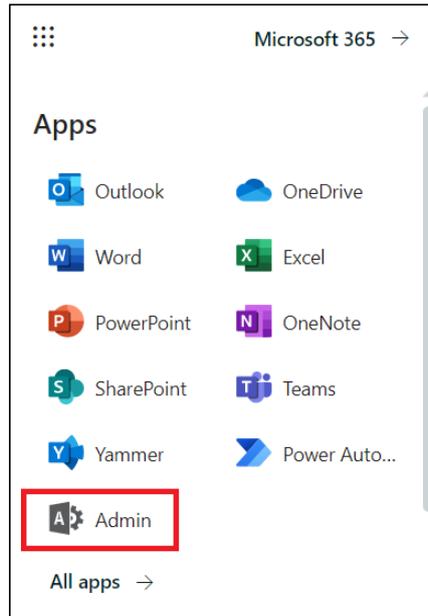
  - ApplicationImpersonation
  - Legal Hold
  - Mailbox Import Export
  - Mailbox Search
  - Public Folders

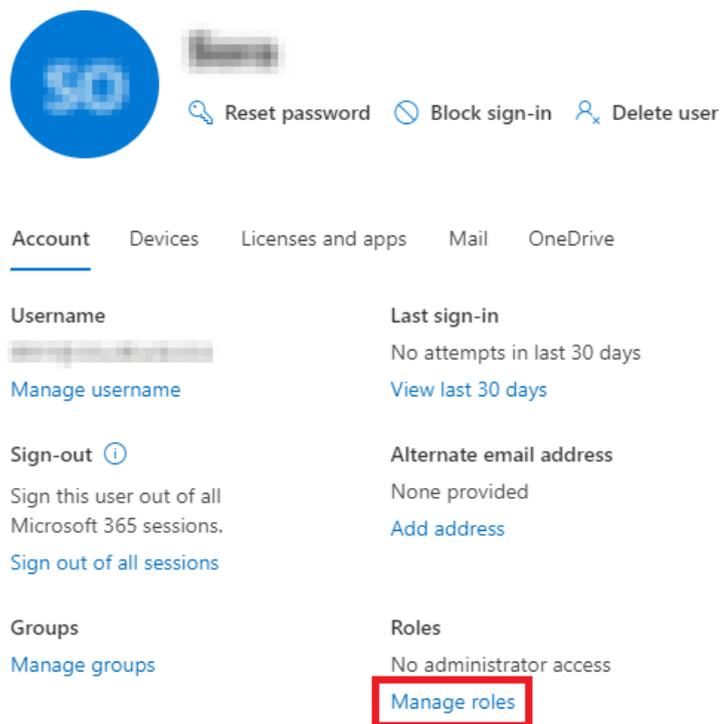## 3.1 Assigning Global Admin Role to Accounts

To assign the Global Admin role to accounts, follow the steps below:

- Click the App launcher in the upper left side then click **Admin** to go to the Microsoft 365 admin center.
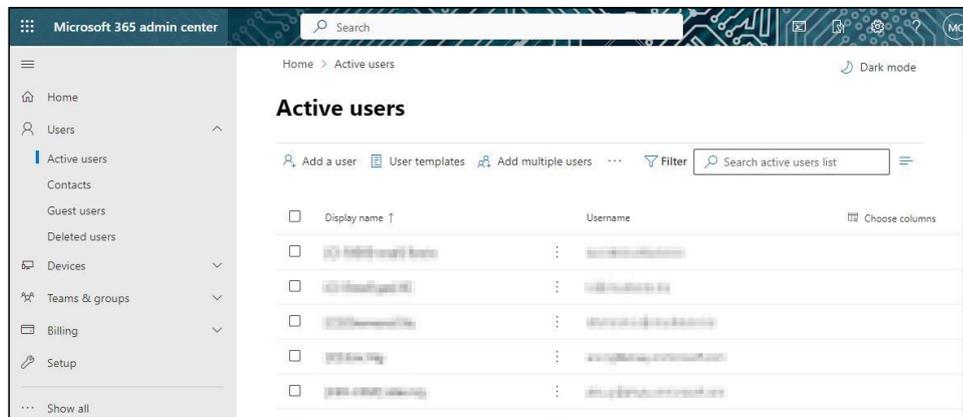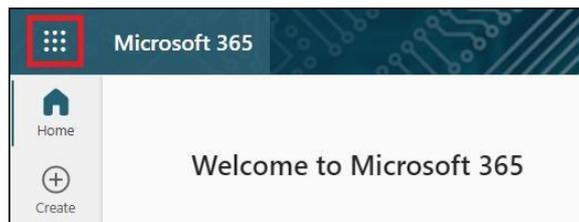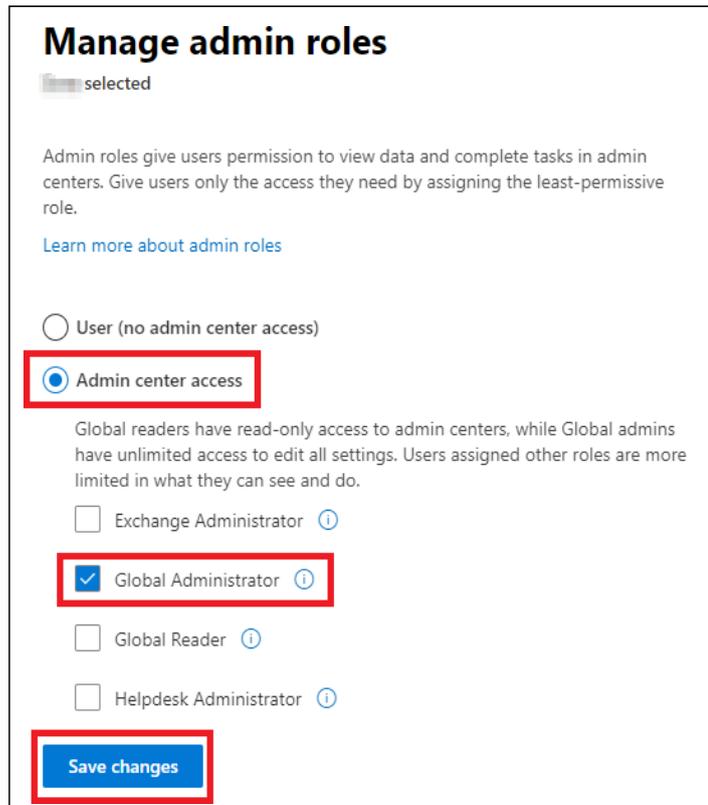
- In the Microsoft 365 admin center, on the left panel click **Users**. Find the user you want to assign the Global Admin role and select **Manage roles**.

- In the Manage roles window, select **Admin center access** then check the box beside **Global admin**. Click **Save Changes** to save the role you assigned.
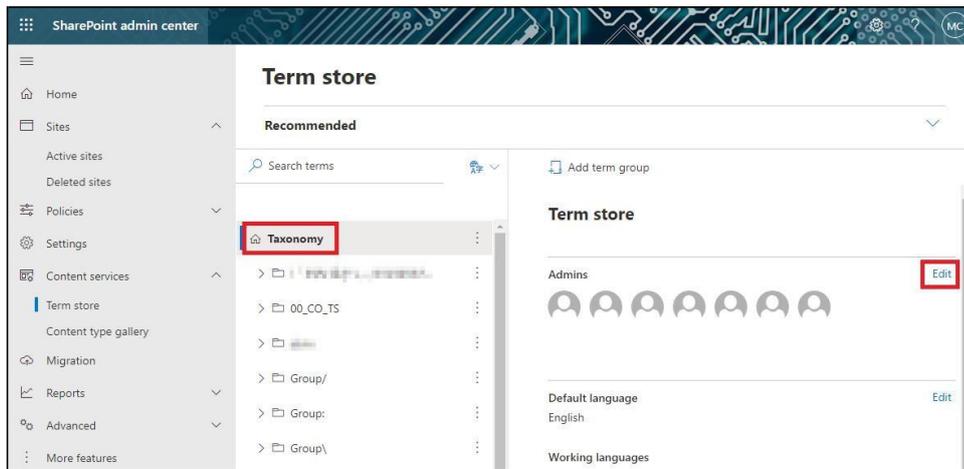

3.2 Granting Term Store Administrator Role

To add Term Store Administrator role to the Microsoft 365 user account used to authenticate the Microsoft 365 backup set.
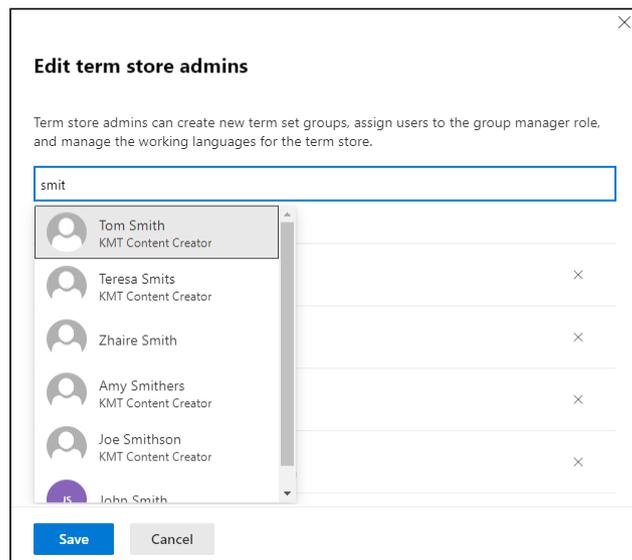
- In the SharePoint admin center, under **Content services**, click **Term store**.
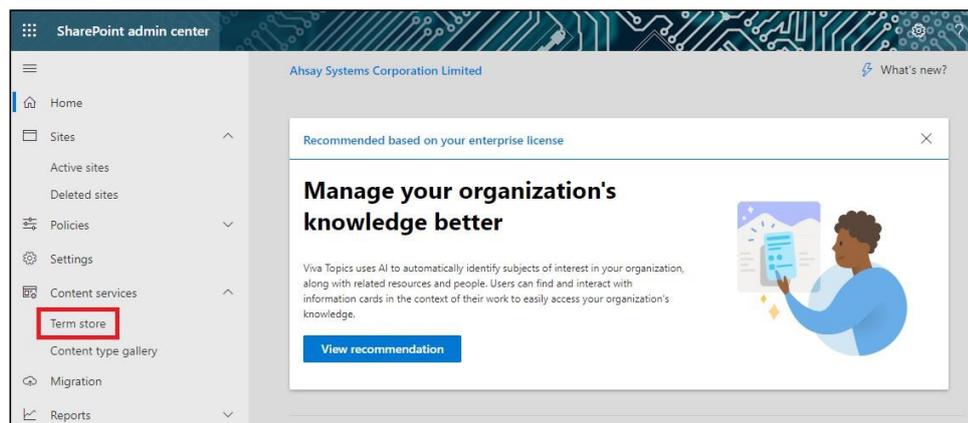
- In the tree view pane in the middle, select **Taxonomy**. Then click **Edit** in the Term store section on the right.


- The "Edit term store admins" panel appears. Enter the names or email addresses of the Microsoft 365 user who you want to add as term store admins then click **Save**.

3.3 Granting Permission Discovery Management Group

This permission allows users added under the **Permissions** section of the **Discovery Management** group to backup and/or restore user item(s) not only for their own account, but also the accounts of other users in the same **Assigned** section.

- Login as an account administrator https://admin.exchange.microsoft.com/

- Select **Admin roles** which is under Roles on the left, then click on **Discovery Management** in the middle. Click on **Permissions** on the right.
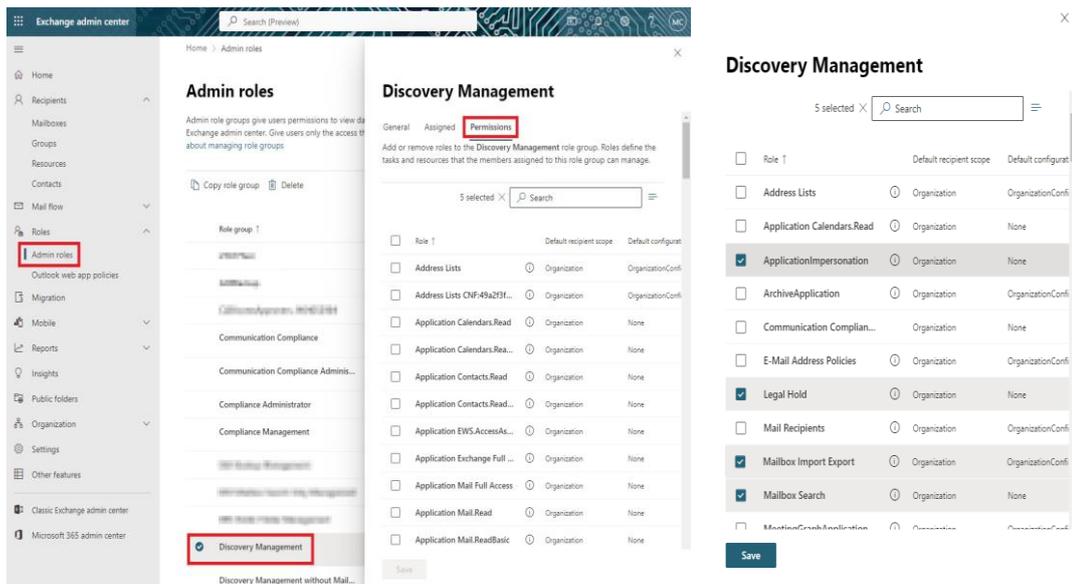
- Tick the box beside the roles you want to add and Save

3.4 Granting Permission to Accounts for Creating Backup Set

- Login as an account administrator https://admin.exchange.microsoft.com/
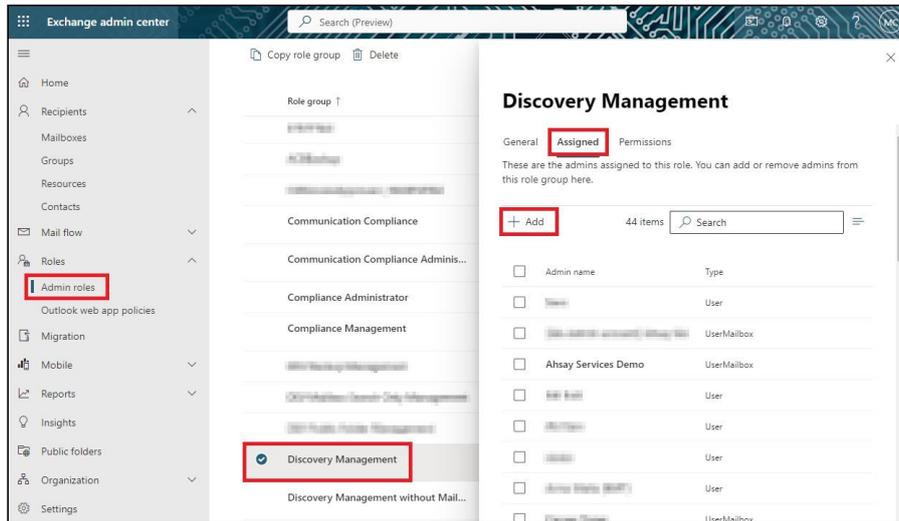
- Select **Admin roles** which is under Roles on the left, then click on **Discovery Management** in the middle. Click **Assigned** on the right, then click **Add**.
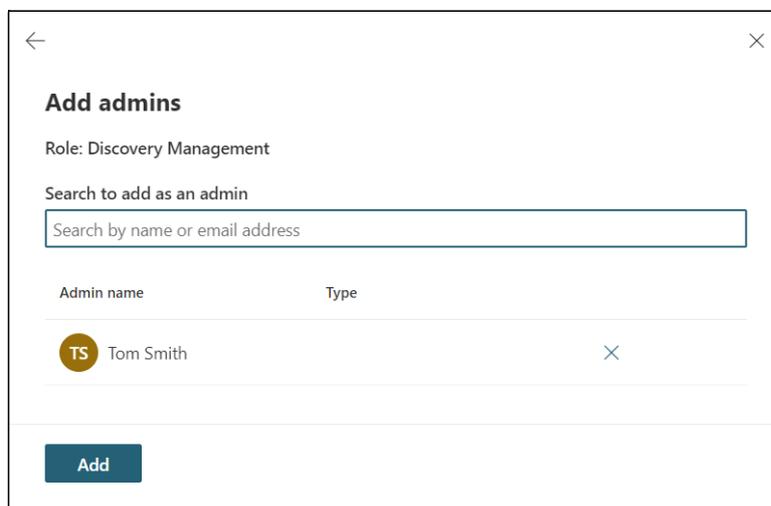

- You can now add users to this group. Search by name or email address then click **Add** once done.

3.5 Granting Permission to restore all share link types to an alternate location

To successfully restore all share link types to an alternate location of the same organization in Microsoft 365, follow the settings below:

◉ Allowing anonymous users to access application pages

- Click the App launcher in the upper left side**.**

- Click **SharePoint** to go to the SharePoint page.
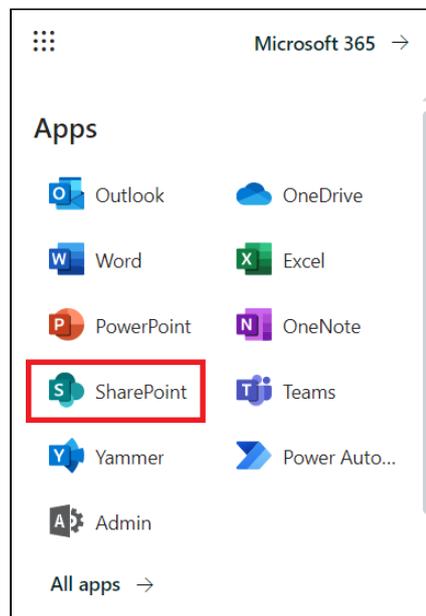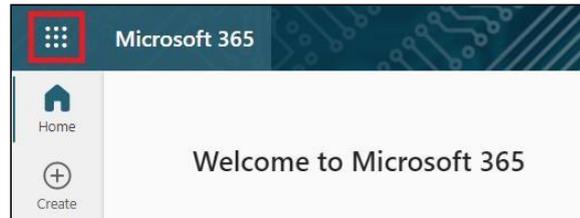
- Click **Settings** > **Site Settings**.
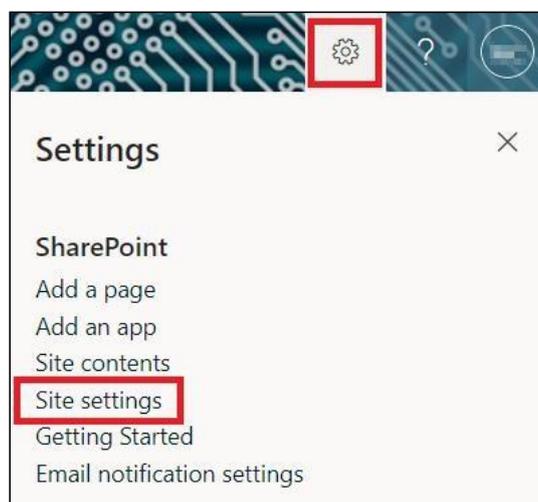
- Under Site Collection Administration, click **Site collection features**.
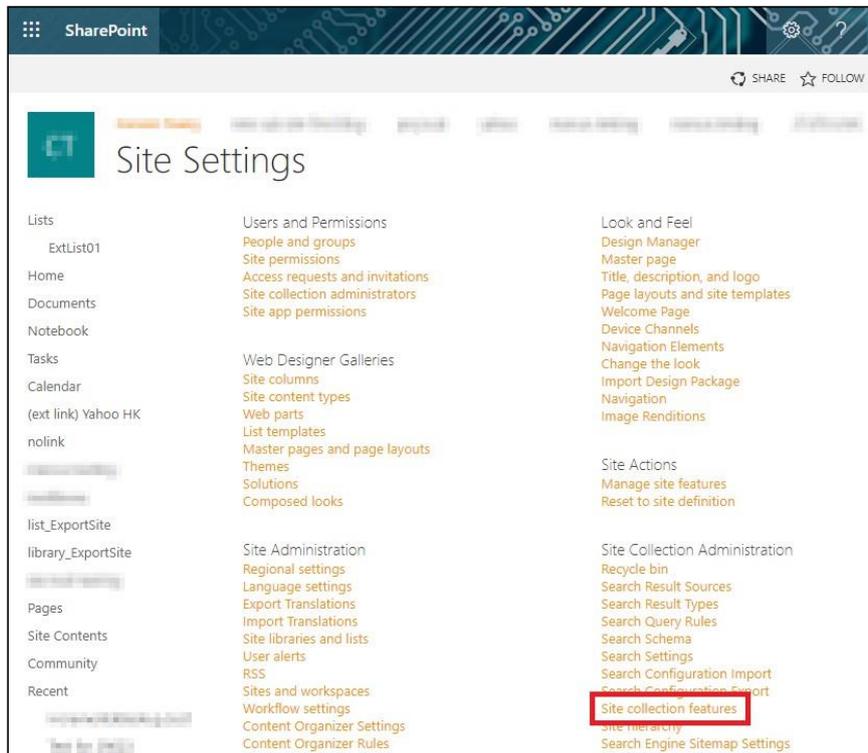
- Scroll down and look for "**Limited-Access user permission lockdown mode**", click the **Deactivate** button.
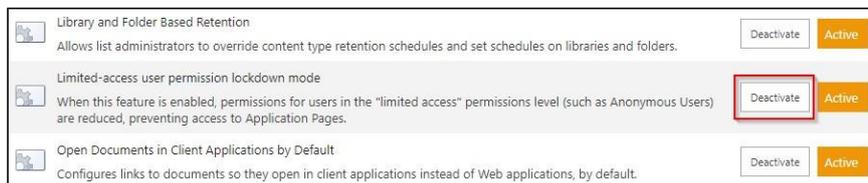
- Click **Deactivate this feature** and then it will no longer be available
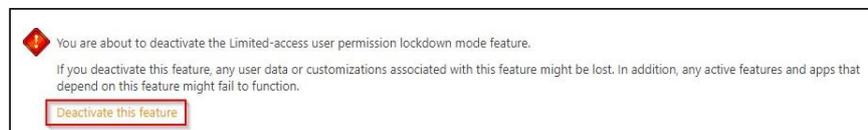
- Go to your **Microsoft 365 Admin Center** > **All admin centers** > in the right pane select **SharePoint**
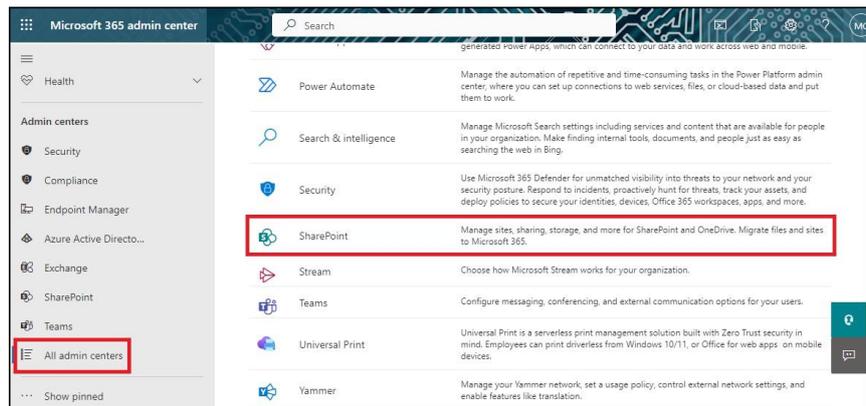
- Go to **Policies** > **Sharing**. Under <u>External sharing</u> the button must be in line with "**Existing guests**" and click **Save**.
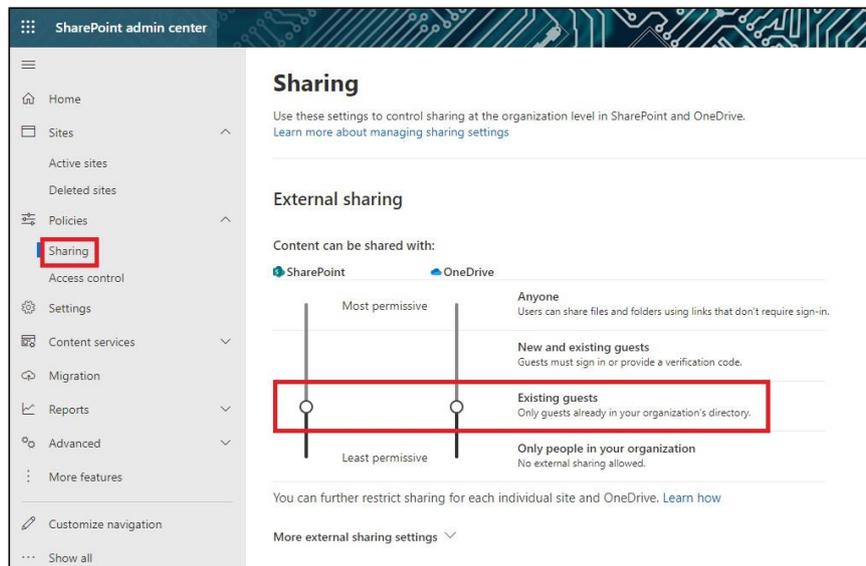
4. Maximum Supported File Size

The following table shows the maximum supported file size per item for the backup and restore of each service.

Service	Maximum File Size
Outlook with or without attachments (applies to User mailbox, Room mailbox, Shared mailbox, Equipment mailbox)	150 MB
Public Folders with or without attachments	150 MB
OneDrive	8 GB
Personal Site	8 GB
Site Collections	8 GB

5. Software Limitations

5.1 Modern Authentication

⊙ Modern Authentication is only supported for the Microsoft 365 account that is registered in the Global region and the Microsoft 365 backup is configured to use the Global region.

⊙ Migration to Modern Authentication is not supported on a Microsoft 365 account without a Global Admin role; or during the migration process, the Microsoft 365 account used to authenticate the migration does not have Global Admin role.

⊙ Backup and restore of the site features setting for SharePoint Site Collection and/or Personal Site using Modern Authentication is not supported.

⊙ Due to limitations in Microsoft API, when using Modern Authentication, backup and restore of SharePoint Web Parts and Metadata are not fully supported.

⊙ Backup sets using Modern Authentication do not support backup of external content types (through the linkage from selected lists), some list settings - currently known as Survey Options on survey list and feature setting for SharePoint Site and Personal Site.

5.2 SharePoint

⊙ Document Libraries, List Items and their default Column Types will be supported, excluding customized Apps and SharePoint App Store applications.

⊙ Most of site lists will be supported, except for certain list types that will be skipped to restore due to API limitation, for example - Microfeed in Classic Team Site.

⊙ Site logos will NOT be restored, it is suggested revisiting the site setting page and manually add the missing images if necessary.

⊙ User-defined workflow templates will NOT be supported for backup and restore.

⊙ Recycle Bin will NOT be supported for backup and restore.

⊙ Most of Site level settings will NOT be restored, except for those essential to support the successful restore of the backup items e.g. Manage Site Feature / Site Collection Feature.

⊙ Most of List level settings (including List view) will NOT be restored, except for those essential to support the successful restore of backup items, e.g. item checkout settings. Following restore, it is suggested revisiting the relevant settings if necessary. This may affect list column ordering and visibility after restoring.

⊙ Restoring External Data column is NOT supported if external content type has been deleted via SharePoint Designer.

⊙ Restoring of multiple Value of managed metadata column when the key name (column name) contains space is NOT supported.

⊙ Restoring of list with local managed metadata column to alternate location is NOT supported.

⊙ The restore of SharePoint documents or folders with the following characters: **/ \ | * : "
< >** in item name to a Windows local computer is not supported. As Windows does not support these characters for either a file or folder name.

- ⊙ Restoring Newsfeed items in **Modern Team Site** will not publish the items to Homepage automatically, user will need to navigate to **Site Content > Page Library**> click on each individual news item and "Post" the news one by one manually.

    o Backup User (except for Global Admin) may not have permission to back up the site collection even if he/she can view it in the backup source tree. FOR EACH site collection, the user can backup it only if he/she is assigned as a site admin of that site collection.

        • If the user is assigned as site admin of the root level site collection only, he/she is not automatically added as site admin of other site collection under that root level site collection (i.e. If user is to backup specific site collection under the root, he/she has to be added as site admin of that specific site collection under the root also)

        • For site collection that can be viewed by user in the source tree which he/she is not yet assigned as a site administrator:

            o when user expand the node of that site collection, access denied error pop up will be given.

            o when user tick such site collection to backup, access denied error will be given in the backup log.

5.3 OneDrive

- ⊙ Backup and restore of file share links will be supported for OneDrive and SharePoint Documents only, and only for restore to the same Microsoft 365 organization.

- ⊙ Backup and restore of all versions will be supported for **OneDrive and SharePoint Documents** only, except for ".aspx" files.

5.4 Outlook

- ⊙ **Online Archive Mailbox** will NOT be supported for backup and restore.

- ⊙ For Outlook mail item, after using restore to **original location** to overwrite a mail item (the restored mail item is assigned a new mail ID), then

    o In the backup source tree of the same backup set:

    • the original ticked item still uses the old mail ID to reference and becomes red item.

        • there is another item (with the new mail ID) created for that mail item

    To avoid future backup error/warning, the user will need to deselect the red item and tick the mail item again (new mail ID) in the backup source tree. This re-selection of backup source is not automatically done after you restore under *overwrite to original location* scenario.

5.5 Teams

- ⊙ Backup of external chat/message, attachment to system message backup (e.g. meeting recording) and backup tabs, pins for chat/channel are not supported.

- ⊙ Restore of chat/channel to original thread is not supported. Restore only as data export in HTML format, stored to local or OneDrive.

6. Microsoft Limitations

6.1 Exchange Online

For more detailed information on the limitations of Exchange Online, please refer to this Microsoft article, [Exchange Online Limits](). These are some of the limitations that will be discussed in the Exchange Online Limits article:

- Address book
- Mailbox storage
- Capacity alerts
- Mailbox folder
- Message
- Receiving and sending
- Retention
- Distribution group
- Journal, Transport, and Inbox rule
- Moderation
- Exchange ActiveSync

6.2 OneDrive

For more detailed information on the limitations of OneDrive, please refer to this Microsoft article, [OneDrive Limits](). These are some of the limitations that will be discussed in the OneDrive Limits article:

- File name and path lengths
- Thumbnails and previews
- Number of items to be synced
- Information rights management
- Differential sync
- Libraries with specific columns
- Windows specific limitations

6.3 SharePoint

For more detailed information on the limitations of SharePoint Online, please refer to this Microsoft article, [SharePoint Online Limits](#). These are some of the limitations that will be discussed in the SharePoint Online article:

◉ Limits by plan

Feature	Office 365 Business Essentials or Business Premium	Office 365 Enterprise E1, E3, or E5, or SharePoint Online Plan 1 or 2	Office 365 Enterprise F1
Total storage per organization[1,2]	1 TB plus 10 GB per license purchased	1 TB plus 10 GB per license purchased[3]	1 TB[3]
Max storage per site collection[4]	25 TB	25 TB	25 TB[5]
Site collections per organization	1 million[6]	1 million[6]	1 million
Number of users	Up to 300	1- 500,000[7]	1- 500,000[7]

◉ Service limits for all plans, such as: items in lists and libraries, file size and file path length, moving and copying across site collections, sync, versions,