Microsoft 365 SETUP GUIDE



PRO Account

March 2024

Table of Contents

1. Creating a Microsoft 365 Backup Set
2. Microsoft 365 License Requirements
3. Microsoft 365 Permission Requirements
3.1 Assigning Global Admin Role to Accounts7
3.2 Granting Term Store Administrator Role9
3.3 Granting Permission Discovery Management Group11
3.4 Granting Permission to Accounts for Creating Backup Set12
3.5 Granting Permission to restore all share link types to an alternate location
4. Maximum Supported File Size16
5. Software Limitations
5.1 Modern Authentication17
5.2 SharePoint17
5.3 OneDrive
5.4 Outlook
5.5 Teams
6. Microsoft Limitations
6.1 Exchange Online
6.2 OneDrive
6.3 SharePoint20

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.

	Croate Backup Set	
	Create Backup Set	
Name		
Client Run Microso	t 365 Backup Set	
Backup set type		
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Backup Scope		
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O This Microsoft 3	5 user only	
Region		
Global 🖌		
Access the Inter	et through provy	
	et through proxy	
Test		

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

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



Authorization Code for Microsoft 365

0.Aa4Amp-0pRwiWk2fl1DfZk6jlK8Tm_VFpzdDoqJ4YbL(

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



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 	
This Microsoft 365 user only	
Region	
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.

Backup Source	
Select Microsoft 365 user(s) to backup All users Select Specific Select Auto-exclude any Microsoft 365 unlicensed user during backup Select the data type that you want to backup which are owned by the selected user(s) COMPARIANCE ON THE Select ON THE SELECT COMPARIANCE ON THE SELECT	
	Previous Next Cancel Help

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

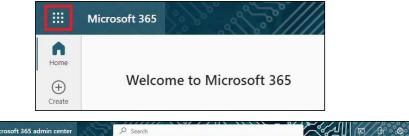
The Discovery Management security group must be assigned the following roles.

- ApplicationImpersonation
- Legal Hold
- Mailbox Import Export
- Mailbox Search
- Public Folders

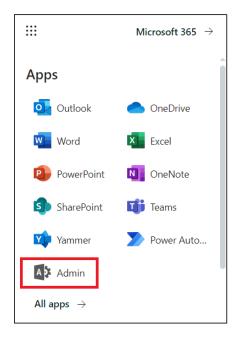
3.1 Assigning Global Admin Role to Accounts

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.



::: Microsoft 365 adı	min center	, Search		
=		Home > Active users		Dark mode
යි Home		Active users		
A Users	^			
Active users		🞗 Add a user 🔋 User templates 🕺	Add multiple users … 🖓 Filter 🔎 Searc	h active users list 📃 🚍
Contacts				
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- 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**.

SOO Reset password	∑ Block sign-in ^A x Delete user
Account Devices Licenses and a	pps Mail OneDrive
Username	Last sign-in
B1110 00 000 000 00000	No attempts in last 30 days
Manage username	View last 30 days
Sign-out (i)	Alternate email address
Sign this user out of all Microsoft 365 sessions.	None provided
	Add address
Sign out of all sessions	
Groups	Roles
Manage groups	No administrator access
	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.

Manage admin roles
Admin roles give users permission to view data and complete tasks in admin centers. Give users only the access they need by assigning the least-permissive role.
Learn more about admin roles
User (no admin center access)
Admin center access
Global readers have read-only access to admin centers, while Global admins have unlimited access to edit all settings. Users assigned other roles are more limited in what they can see and do.
Exchange Administrator i
Global Administrator ①
Global Reader 🕕
Helpdesk Administrator 🥡
Save changes

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**.

	SharePoint admin center		
=			Ahsay Systems Corporation Limited & What's new?
ŵ	Home		
	Sites	^	Recommended based on your enterprise license
	Active sites		
	Deleted sites		Manage your organization's
	Policies	\sim	knowledge better
ŝ	Settings		Viva Topics uses AI to automatically identify subjects of interest in your organization,
	Content services	^	along with related resources and people. Users can find and interact with information cards in the context of their work to easily access your organization's
	Term store		knowledge.
	Content type gallery		View recommendation
Ģ	Migration		
⊵	Reports	\sim	

In the tree view pane in the middle, select **Taxonomy**. Then click **Edit** in the Term store section on the right.

	SharePoint admin center		S?//////????]			2 MC
=			Term store			
ŵ	Home		icilii Store			
	Sites	^	Recommended			~
	Active sites		₽ Search terms	*** ~	↓ Add term group	
I	Deleted sites					
	Policies	\sim			Term store	
	Settings		💮 Taxonomy	÷		
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2	Content type gallery					
୍	Migration					
K I	Reports	\sim	> 🗅 Group/	8	Default language	Edit
	Advanced	~	> 🖻 Group:	1	Default language English	Edit
: 1	More features		> 🖻 Group\	1	Working languages	

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- 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**.

erm store admins can create new term set groups, assign nd manage the working languages for the term store.	n users to the group manager role,
smit	
Tom Smith KMT Content Creator	
Teresa Smits KMT Content Creator	×
Zhaire Smith	×
Amy Smithers KMT Content Creator	×
Joe Smithson KMT Content Creator	×
Is John Smith	

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.

	Exchange admin center	e al	P Search (Preview)		er al	ľ	E . E	0 2 00					X
≡ ©	Home		Home > Admin roles					×	Dis	covery Manage	me	nt	
	Recipients	^	Admin roles	Dis	covery Manage	me	nt			5 selected $ imes$,0 S€	arch	=
	Mailboxes Groups Resources		Admin role groups give users permissions to view da Exchange admin center. Give users only the access th about managing role groups		Assigned Permissions remove roles to the Discovery N nd resources that the members a					Role î		Default recipient scope	Default configurat
	Contacts Mail flow		D Copy role group		5 selected \times ,	p se	arch	=		Address Lists	0	Organization	OrganizationConf
	Roles	~	Role group †	П	Role 1		Default recipient scope	Default configurat		Application Calendars.Read	0	Organization	None
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	Dutlook web app policies Migration		Little Log	0	Address Lists CNF:49a2f3f	100	Organization	OrganizationConfi		ArchiveApplication	i	Organization	OrganizationConf
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]	Microsoft 365 admin center		Discovery Management		Application Mail.ReadBasic	0	Organization	None	Sav				- secondoral and
			Discovery Management without Mail										

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.

	Exchange admin center	200		66 AU (B &) 2 (K)
=			🗅 Copy role group 📋 Delete	×
ଜ	Home		Role group ↑	Discovery Management
8	Recipients Mailboxes	^	10000	
	Groups		Killahap	These are the admins assigned to this role. You can add or remove admins from
	Resources Contacts		The subgroup (Self-Self-	this role group here.
	Mail flow	\sim	Communication Compliance	+ Add 44 items 🔎 Search =
<i>P</i> e	Roles	^	Communication Compliance Adminis	Admin name Type
Ľ	Admin roles Outlook web app policies		Compliance Administrator	User User
G	Migration		Compliance Management	UserMailbox
ď	Mobile	\sim	Mile Review Memory and	Ahsay Services Demo UserMailbox
Ŀ	Reports	\sim	Old Trickalitase Connels Only Management	User
8	Insights		CELEVILLA NUMBER OF CONTRACTORS	User
C₽	Public folders		Discovery Management	User User
~	Organization	\sim	Discovery Management without Mail	User
	Settings		biscovery wanagement without man	UserMailbox

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

Add admins		
Role: Discovery Manage	nent	
Search to add as an adm	in	
Search by name or emain	l address	
Admin name	Туре	
TS Tom Smith		×
Add		

-

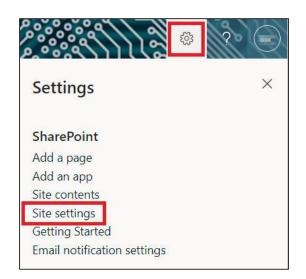
3.5 Granting Permission to restore all share link types to an alternate location

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.

	Microsoft	t 365	Ser .	29	Jen /	
Home (+) Create	v	Velco	me to Mi	croso	oft 365	
		N	licrosoft 365	\rightarrow		
Apps	5			Î		
	Outlook		OneDrive			
W	Word	x	Excel			
P	PowerPoint	N	OneNote			
5	SharePoint	T	Teams			
M	Yammer	2	Power Auto			
A	Admin					
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Click Settings > Site Settings.



- Under Site Collection Administration, click Site collection features.

::: SharePoint		\$\$ ```````````````````````````````````
		SHARE 🕁 FOLLOW
CT Site S	ettings	s same lating summarizing (Collected
Lists ExtList01 Home Documents Notebook Tasks	Users and Permissions People and groups Site permissions Access requests and invitations Site collection administrators Site app permissions Web Designer Galleries	Look and Feel Design Manager Master page Title, description, and logo Page layouts and site templates Welcome Page Device Channels Navigation Elements Change the look
Calendar (ext link) Yahoo HK nolink	Site columns Site content types Web parts List templates Master pages and page layouts Themes	Import Design Package Navigation Image Renditions
list_ExportSite	Solutions Composed looks	Manage site features Reset to site definition
library_ExportSite Pages	Site Administration Regional settings Language settings Export Translations	Site Collection Administration Recycle bin Search Result Sources Search Result Types
Site Contents Community	Import Translations Site libraries and lists User alerts RSS	Search Query Rules Search Schema Search Settings Search Configuration Import
Recent	RSS Sites and workspaces Workflow settings Content Organizer Settings Content Organizer Rules	Search Configuration Suport Site collection features
Taxas Rev (1997) 1	Content Organizer Rules	Search Engine Sitemap Settings

- 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

	Microsoft 365 admin center	يوفر	Ø Search	
_		W		generated Power Apps, which can connect to your data and work across web and mobile.
8	Health ~	\boxtimes	Power Automate	Manage the automation of repetitive and time-consuming tasks in the Power Platform admin center, where you can set up connections to web services, filler, or cloud-based data and put them to work.
Adı ()	min centers Security	Q	Search & intelligence	Manage Microsoft Search settings including services and content that are available for people in your organization. Make finding internal tools, documents, and people just as easy as searching the web in Bing.
•	Compliance Endpoint Manager	0	Security	Use Microsoft 365 Defender for unmatched visibility into threats to your network and your security posture. Respond to incidents, proactively hunt for threats, track your assets, and deploy policies to secure your identities, devices, Office 365 workspaces, apps, and more.
٨	Azure Active Directo	ø	SharePoint	Manage sites, sharing, storage, and more for SharePoint and OneDrive. Migrate files and sites to Microsoft 365.
68	Exchange		Stream	Choose how Microsoft Stream works for your organization.
6	SharePoint	G fő	Teams	Configure messaging, conferencing, and external communication options for your users.
¢®	Teams All admin centers	6	Universal Print	Universal Print is a serverless print management solution built with Zero Trust security in mind. Employees can print driverless from Windows 10/11, or Office for web apps on mobile devices:
	Show pinned		Yammer	Manage your Yammer network, set a usage policy, control external network settings, and enable features like translation.

- Go to **Policies** > **Sharing**. Under <u>External sharing</u> the button must be in line with **"Existing guests**" and click **Save**.

	SharePoint admin center	P a	S //////	»»///	
=					
ഹ	Home		Sharing		
	Sites	~	Use these settings to control Learn more about managing		organization level in SharePoint and OneDrive. s
	Active sites				
	Deleted sites		External sharing		
<u>0</u>	Policies	~	External sharing		
	Sharing		Content can be shared wit	h:	
8	Access control		SharePoint	OneDrive	
() ()	Settings		Most permissive		Anyone Users can share files and folders using links that don't require sign-in.
50	Content services	\sim			New and existing guests Guests must sign in or provide a verification code.
G	Migration			_	
Ł	Reports	~	\$	¢	Existing guests Only guests already in your organization's directory.
°0	Advanced	\sim	Least permissive		Only people in your organization
:	More features				No external sharing allowed.
	2 33 3 5		You can further restrict sha	ring for each ir	idividual site and OneDrive. Learn how
0	Customize navigation		More external sharing settin	gs 💛	
	Show all				

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.
 - 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:
 - when user expand the node of that site collection, access denied error pop up will be given.
 - 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
 - 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, <u>Exchange Online Limits</u>. 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, <u>OneDrive Limits</u>. 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, <u>SharePoint Online Limits</u>. 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,