

# Backup Express Universal Backup Microsoft 365 Backup

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Revision 2023-07-18

Universal Backup provides a means for protecting all of your data, wherever it may be. This guide will step through the process of backing up Microsoft 365.

This guide assumes that you have already setup a Universal Backup account (a free trial account is sufficient) and that you have the login details for both the [Billing System](#) and the [Backup Vault](#) on hand.

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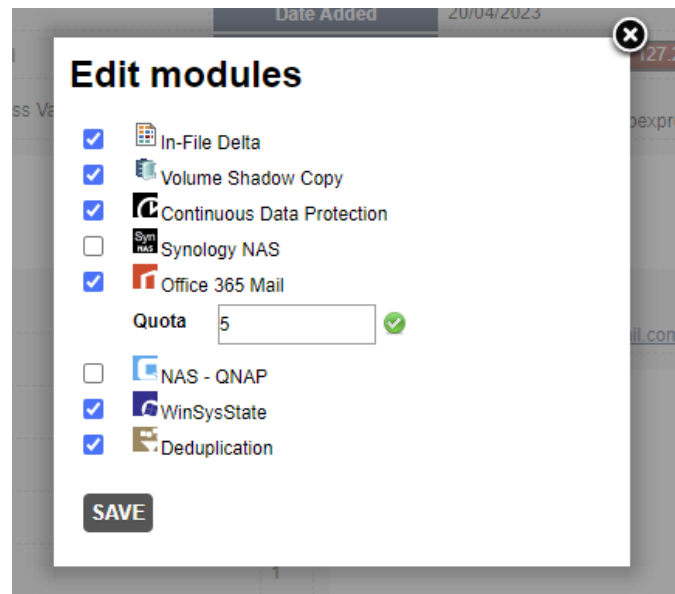
## 1. Add Office 365 licences to your backup account.

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You will need to enable your backup account for 365 backup and add the required number of licences. You will need a licence for each user or shared mailbox. If you do not have enough licences the backup will fail with a 'Quota Exceeded' error. Note that once your free trial is over there is an additional [monthly charge](#) for these licences.

Log into the [Billing System](#) with your email address, password and 6-digit verification code from your authenticator app.

Click on your Backup Account, then click 'EDIT MODULES'. Enable 'Office 365 Mail' and set the Quota to the number of licences you require.



Click 'Save' when you are done.

## 2. Backup single users or the Entire Organisation?

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If you only want to backup a small number of users then it may be easiest to setup a Microsoft 365 Backup Set for each user. Each Backup Set will authenticate with 365 as a single user and will backup that user's mailbox and OneDrive.

If you want to backup many users in a corporate 365 tenancy then you may prefer to create a single Microsoft 365 Backup Set that can backup all your users, mailboxes and SharePoint sites. This requires some additional setup and assumes a working knowledge of Microsoft 365 administration.

## 3. Decide where you want to run your 365 backup.

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You can run Microsoft 365 backup using the Universal Backup software installed on your PC, server or Mac. The benefit of this is that if you are use Universal Backup for your local files you will already have the software installed, and you can manage all your backups conveniently in the same place.

You can also run Microsoft 365 backup as a cloud-to-cloud backup. The benefit of this is that the data travels directly from Microsoft's cloud to the Backup Express cloud without involving your internet connection or your local PC. You don't need any local hardware to run a cloud-to-cloud backup. It also means that the backup will run even when your PC is not running.

Regardless of which method you choose the setup process is very similar. The screenshots in the following examples are from a local PC software installation. The process is almost identical for a cloud-to-cloud setup although the screens will look a little different.

## 4. Setting up 365 backup for a single user.

Open the Universal Backup software on your local PC, or log into the [Backup Express Vault](#).

In 'Backup Sets' Click 'Add'.

### Create Backup Set

Select 'Microsoft 365 Backup' from the dropdown. Give the backup a meaningful name, for example 'Fred Jones 365 Backup'. Choose 'This Microsoft 365 user only'.

Name  
Fred Jones Office 365 Backup Set-1

Backup set type  
Microsoft 365 Backup

Backup Scope  
 Entire Organization  
 This Microsoft 365 user only

Region  
Global

Access the Internet through proxy

Test

Click Test. You'll see the following:

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

Click Authorize and sign into 365 as the user in the usual way. You'll be presented with an authorisation code similar to this.

BackUP  
EXPRESS

Authorization Code for Microsoft 365

0.AWcAKex0LWqHL0yHFQD8R\_xx-hgRHypkEH9BqoV9

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

Return to Universal Backup. Paste in the Authorization Code and click 'OK'.

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.

kzpWEIFDkjz5wsnAJYmlNyhHoHVsrmqt0WY\_bQt2wOUeKDG1uQ-Nnnd-uY

OK Cancel

If all is well you should see 'Test completed successfully'.

Name  
Fred Jones Office 365 Backup Set-1

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

The Backup Set is now authorised to connect to 365. Click 'Next'.

## Backup Source

Now you can select the 365 Components you would like backed up.

Select the items and folders that you want to backup

- Outlook
- OneDrive
- Personal Site
- Public Folders
- Teams Chat

In "This Microsoft user only" backup scope, files received by the user in Teams Chats are NOT backed up".

Once you have made your selection client 'Next'.

You can modify or add to the default schedule if you wish.

Run scheduled backup for this backup set

On



Existing schedules



Daily

Daily (Everyday at 22:00)

Add

Click 'Next'.

Choose a Storage Destination. To store your backups on our cloud choose 'Backup Express Vault'. You can also choose a local storage device if you want to keep a local backup.

## Destination

Backup mode

Sequential

Existing storage destinations



Backup Express Vault

Host: vault.backupexpress.com.au:443

Add



The encryption key defaults to the backup account password, but you may choose your own if you prefer. Be sure to store the encryption key in a safe place.

Your Backup Set is now ready to go. Repeat this process for any other users you want to backup.

## 5. Setting up 365 backup for an entire organisation

You can use your existing Tenant Admin account for running the backups, but best practice is to create a separate user, for example 'BackupUser@<yourtenant>.onmicrosoft.com'. This user needs to be a Global Admin but does not need a 365 licence. You will also need to perform some preparatory setup as described in Appendix A.

Open the Universal Backup software on your local PC, or log into the [Backup Express Vault](#).

### Create Backup Set

Select 'Microsoft 365 Backup' from the dropdown. Give the backup a meaningful name, for example 'Office 365 Backup Set-1'. Choose 'Entire Organization'.

Name

Backup set type

Backup Scope  
 Entire Organization  
 This Microsoft 365 user only

Region

Access the Internet through proxy

Click Test. You'll see the following:

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.

Click Authorize and sign into 365 with your backup user account. You'll be presented with an authorisation code similar to this.

**BackUP  
EXPRESS**

Authorization Code for Microsoft 365

0.AWcAKex0LWqHL0yHFQD8R\_xx-hgRHypkEH9BqoV9

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

Return to Universal Backup. Paste in the Authorization Code and click 'OK'.

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.

kzpWEIFDkjz5wsnAJYmlNyhHoHVsrrnqt0WY\_bQt2wOUeKDG1uQ-Nnnd-uY

If all is well you should see  
'Test completed successfully'.

Name  
Office 365 Backup Set-1

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

The Backup Set is now authorised to connect to 365. Click 'Next'.

## Backup Source

Now you can select the 365 users and items you would like backed up.

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)  
 Outlook  OneDrive  Personal Site  Teams Chat  
 Teams  
 SharePoint Sites  
 All SharePoint sites excluding personal and group sites  
 Select Specific [Select](#)

Public Folders

Once you have made your selection click 'Next'.

Run scheduled backup for this backup set

On 

You can modify or add to the default schedule if you wish.

Existing schedules

 **Daily**  
Daily (Everyday at 22:00)


Add

Click 'Next'.

## Destination

Choose a Storage Destination. To store your backups on our cloud choose 'Backup Express Vault'. You can also choose a local storage device if you want to keep a local backup.

Backup mode  
Sequential

Existing storage destinations  
 **Backup Express Vault**  
Host: vault.backupexpress.com.au:443

Add

The encryption key defaults to 'User password', meaning the Backup Account password, but you may choose your own if you prefer. Be sure to store the encryption key in a safe place.

Your backup set is now ready to run.

**TIP: Most organisations need to deal with staff turnover over time. One way to handle this with minimal administration overhead is to create two backup jobs:**

- 'Office 365 Backup Set (Licensed Users Only)'. This set will cover your active users.

### Backup Source

Select Microsoft 365 user(s) to backup

- All users
- Select Specific Select
- Auto-exclude any Microsoft 365 unlicensed user during backup

- 'Office 365 Backup Set (Selected Unlicensed mailboxes)'. You could configure this set to include specific shared mailboxes.

### Backup Source

Select Microsoft 365 user(s) to backup

- All users
- Select Specific Select
- Auto-exclude any Microsoft 365 unlicensed user during backup



## Appendix A: Modify 365 tenant configuration to enable organisation-wide backups.

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This section assumes knowledge of PowerShell and in particular using PowerShell to interact with Microsoft 365. A useful reference on connecting to 365 with PowerShell is here: [Connect to Exchange Online with PowerShell](#).

### Step 1: Enable Organisation Customisation.

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By default, Microsoft 365 tenancies store much of their configuration in a compacted state to save resources. Microsoft refers to this as a ‘dehydrated’ state. In order to make the required configuration changes you first need to ‘hydrate’ the 365 organisation.

Log onto Exchange Online using PowerShell.

Run the command shown below in the Windows PowerShell to see if the organisation is in a dehydrated state (it usually will be dehydrated).

#### Get-OrganizationConfig | fl IsDehydrated

```
PS C:\Users\mpnadmin> Get-OrganizationConfig | Select-Object IsDehydrated
IsDehydrated
-----
True
```

If the result is ‘False’ then you can proceed to Step 2.

If the result is True then you will need hydrate it to enable customisation. Enter the following command:

#### Enable-OrganizationCustomization.

This command will normally complete without any output or error but the change can take some time to take effect. Wait a few minutes and then again run the first command to confirm the update:

```
PS C:\Users\mpnadmin> Get-OrganizationConfig | Select-Object IsDehydrated
IsDehydrated
-----
False
```

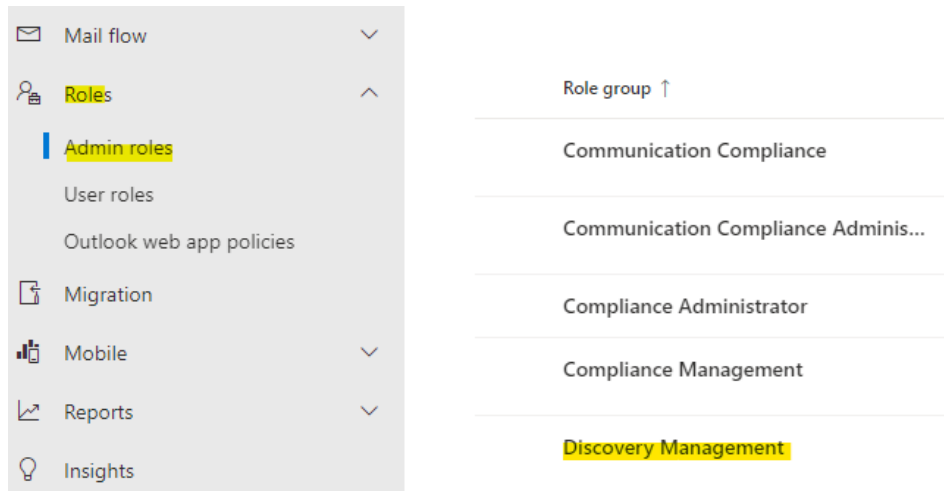
You may still need to wait several hours for the change to take full effect. You may want to wait a few hours or even overnight before proceeding with Step 2.

## Step 2: Add the necessary permissions.

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Login to the [Exchange admin center](#) using your tenant admin credentials.

Click Exchange > Roles > Admin roles > Discovery Management



Under the 'Assigned' tab add the account that you will use for running backup.

Under 'Permissions' verify that the following roles are enabled:

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

Click 'Save'.

**If you receive an error when saving the usual cause is that you have not enabled Organisation Customization (Step 1) or have not allowed sufficient time for it to take effect.**