

Quick Start Guide

# Microsoft 365 Backup & Recovery



QS MS365 CE 23.2.1



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## 2 Preface

Thank you for selecting CloudAlly Backup for Microsoft 365. Relax! All your Microsoft 365 data is now securely protected with easy recovery from data loss. CloudAlly comprehensively backs up your Microsoft 365 data on industry-leading AWS S3 storage. Our product's ethos is to provide feature-rich backup and recovery with security, ease of use, and flexibility woven in.

This guide is organized to help you find the information you need to manage CloudAlly Backup for Microsoft 365. This guide explains how you can set up an account and activate Microsoft 365 backup in three basic steps:

1. [Creating and Accessing Your CloudAlly Account](#)
2. [Backing Up Your Microsoft 365 Data](#)
3. [Managing Your Account](#)

### For Further Information:

This is a short Quick Start Guide. For a full description of our Backup and Recovery services, please see our [Online and PDF User Guides](#).

If you prefer visual explanations, there are many helpful CloudAlly videos on our Youtube Channel:

- [Activating MS Exchange Backups](#)
- [Activating OneDrive Backups](#)
- [Activating SharePoint Backups](#)
- [Activating Teams & Groups Backups](#)

## 3 Creating and Accessing Your CloudAlly Account

### 3.1 Sign Up/Sign In from the CloudAlly Home Page

1. In your Internet browser, open [cloudally.com](https://cloudally.com) and click **Login**.
2. Click **Customers**. The *Sign In* page is displayed.
3. If you don't have an account yet, click **Sign Up**. The *Sign Up* page is displayed.
4. Complete the form, and then click **Sign up**.
5. Your trial account is created, and an email containing your activation link is sent to your email address. Click on the activation link contained in the email you received to activate your account. If you sign up with Google, Azure, or Okta, the activation link will not be sent to you.
6. Once your account is activated, you are redirected to the CloudAlly *login* page. Enter your email address/password and click **Sign In** to login and access your CloudAlly Account.

## 4 Backing Up Your Microsoft 365 Data

With a few simple clicks, you can activate backups for all of the Microsoft 365 services.

### 4.1 Microsoft 365 Exchange

#### 4.1.1 Creating a New Backup Task

To create a new CloudAlly backup task:

1. Sign in to your Account, or if you are already signed in, click the **Homepage** option in the Navigation Panel.
2. On the Homepage, click **+ Add Backup Task**.
3. The *Activate A New Backup* page is displayed.
4. Click the name of the service you would like to back up.
5. Fill in the name of the backup task. This name is used in the notifications and reports, and it can be changed later.
6. You will see the OAuth based authorization Click **Authenticate** to start the process of granting the access token. You will be redirected to the *Microsoft sign-in* page. Enter Global Admin credentials to sign in to your Microsoft account.

#### IMPORTANT!

The user that you enter must have Global Admin permissions.

#### 4.1.2 Configuring a Backup Task: Microsoft Exchange

This set of options enables you to select the backup settings for the Account, Site, Team or Group. Click the settings icon on the top right side of the screen.

1. You can change the name of the backup task by clicking .
2. The icon to the right of the Microsoft 365 logo displays whether the application was able to connect to the specified Microsoft 365 account. If the authentication token granted for the application becomes invalid (e.g., it expires due to inactivity because you put the backup task on pause for a long time), the green Connected icon changes to the red Disconnected. To grant the application a new token, click on the icon to open the authentication dialog, and repeat the authentication process.
3. By default, the “Index all data for Search” option is selected, which enables CloudAlly to provide you with its granular search and restore functionality. In the process, your data is temporarily decrypted for a brief period of time, and then re-encrypted once the index is built. If this goes against your company policy and you would like to disable automatic indexing, please contact [support@cloudally.com](mailto:support@cloudally.com).
4. In the Microsoft Exchange system, accounts can have an “Unlicensed” status (not to be confused with “Unlicensed product”). These can be the external accounts invited by users with an active license, accounts automatically generated for shared file storage, etc. You can find the license status of an account using the Admin Center. Check **Backup Unlicensed accounts** if you want CloudAlly to back up such accounts.
5. Backups are automatically archived when an entire site is deleted. The **Retain auto-archived backups** option allows you to retain them for a specified number of days, after which they will be deleted. Otherwise, the backups will be retained indefinitely.
6. The Automatically activate new mailboxes option instructs the system to detect new mailboxes, and begin backing them up automatically.
7. The **Backup Data Center** field displays the Data Center location you selected when you signed up with your registration.

The **Retention Period** field displays whether a retention period has been set up. By default, we provide unlimited retention of your daily backups for as long as you maintain your account subscription. You can override this default and specify a retention period in days, months, or years by submitting a support ticket. Backups older than the retention period specified will be automatically deleted.

#### 8. **Backup Frequency and Backup Hour**

- a. Click the drop-down list adjacent to the **Backup Frequency** field and select how often you would like the backups to occur.

- b. Click the drop-down list adjacent to the **Backup Hour (UTC)** field and select the backup hour. Click **Save**.

### 4.1.3 Activating Your Backup Tasks

Once you have configured your backup settings, you need to **Activate** them, in order for them to begin backing up your data.

1. Scroll down to the bottom of the screen where all of your Account, Site, Team or Group are listed.
2. Select one or more Account, Site, Team or Group(s).
3. Click **Action > Activate**. The status of your backups will now be "Scheduled." This means that they will be backed up at the time that you selected on the Configuration screen.
4. Alternatively, if you prefer to perform an immediate, on-demand backup, click **Action > Backup Now**.

## 4.2 Microsoft 365 OneDrive

### 4.2.1 Adding a OneDrive Backup Task

1. Sign in to your Account, or if you are already signed in, click the **Homepage** option in the Navigation Panel.
2. On the Homepage, click **+ Add Backup Task**.
3. Click **Microsoft 365 OneDrive**.
4. Fill in the name of the backup task.
5. Add the OneDrive URL

**Note:** You can copy the OneDrive URL by opening OneDrive and copying it from the address bar in your browser.



6. You will see the OAuth based authorization Click **Authenticate** to start the process of granting the access token. You will be redirected to the *Microsoft sign-in* page. Enter Global Admin credentials to sign in to your Microsoft account.

### IMPORTANT!

The user that you enter must have Global Admin permissions.

## 4.2.2 Configuring a OneDrive Backup Task

1. You can change the name of the backup task by clicking .
2. The icon to the right of the Microsoft 365 logo displays whether the application was able to connect to the specified Microsoft 365 account. To grant the application a new token, click on the icon to open the authentication dialog, and repeat the authentication process.
3. By default, the “Index all data for Search” option is selected, which enables CloudAlly to provide you with its granular search and restore functionality.
4. The Automatically activate new sites option instructs the system to detect new teams and groups, and activate them automatically.
5. Backups are automatically archived when an entire site is deleted. The **Retain auto-archived backups** option allows you to retain them for a specified number of days, after which they will be deleted. Otherwise, the backups will be retained indefinitely.
6. **Backup Frequency and Backup Hour-** This is the same as [Microsoft Exchange](#).

## 4.2.3 Activating Your Backup Tasks

Once you have configured your backup settings, you need to **Activate** them, in order for them to begin backing up your data.

For instructions, see "[Activating Your Backup Tasks](#)."

## 4.3 Microsoft 365 SharePoint

### 4.3.1 Adding an Microsoft 365 SharePoint Backup Task

To create a new CloudAlly backup task:

1. Sign in to your Account, or if you are already signed in, click the **Homepage** option in the Navigation Panel.
2. On the Homepage, click **+ Add Backup Task**.
3. Click the SharePoint service.
4. Fill in the name of the backup task.
5. Add the SharePoint URL.


**Note:** You can copy the SharePoint URL by opening SharePoint and copying it from the address bar in your browser.

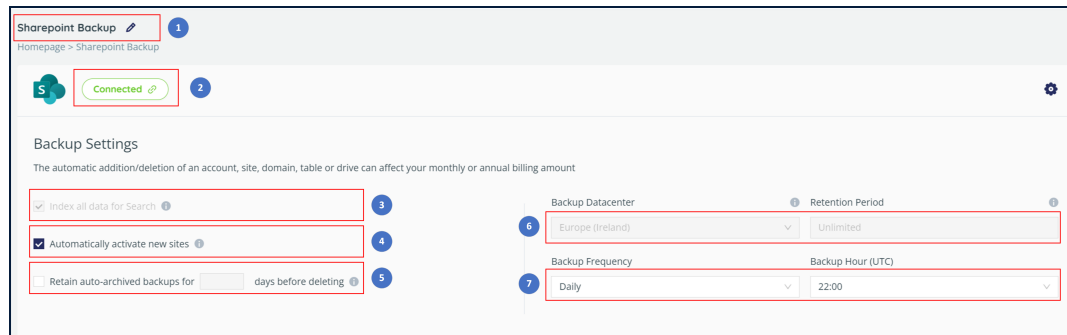
6. You will see the OAuth based authorization Click **Authenticate** to start the process of granting the access token. You will be redirected to the *Microsoft sign-in* page. Enter Global Admin credentials to sign in to your Microsoft account.


#### IMPORTANT!

The user that you enter must have Global Admin permissions.

## 4.3.2 Configuring an Microsoft 365 SharePoint Task

This set of options enables you to select the backup settings for the Account, Site, Team or Group. Click the settings  icon on the top right side of the screen.



1. You can change the name of the backup task by clicking .
2. The icon to the right of the Microsoft 365 logo displays whether the application was able to connect to the specified Microsoft 365 account. To grant the application a new token, click on the icon to open the authentication dialog, and repeat the authentication process.
3. By default, the “Index all data for Search” option is selected, which enables CloudAlly to provide you with its granular search and restore functionality.
4. The Automatically activate new sites option instructs the system to detect new teams and groups, and activate them automatically.
5. Backups are automatically archived when an entire site is deleted. The **Retain auto-archived backups** option allows you to retain them for a specified number of days, after which they will be deleted. Otherwise, the backups will be retained indefinitely.
6. **Backup Frequency and Backup Hour**- This is the same as [Microsoft Exchange](#).

## 4.3.3 Activating Your Backup Tasks

Once you have configured your backup settings, you need to **Activate** them, in order for them to begin backing up your data.

For instructions, see ["Activating Your Backup Tasks."](#)

## 4.4 Microsoft 365 Teams & Groups


### 4.4.1 Adding an Microsoft 365 Teams & Groups Backup Task

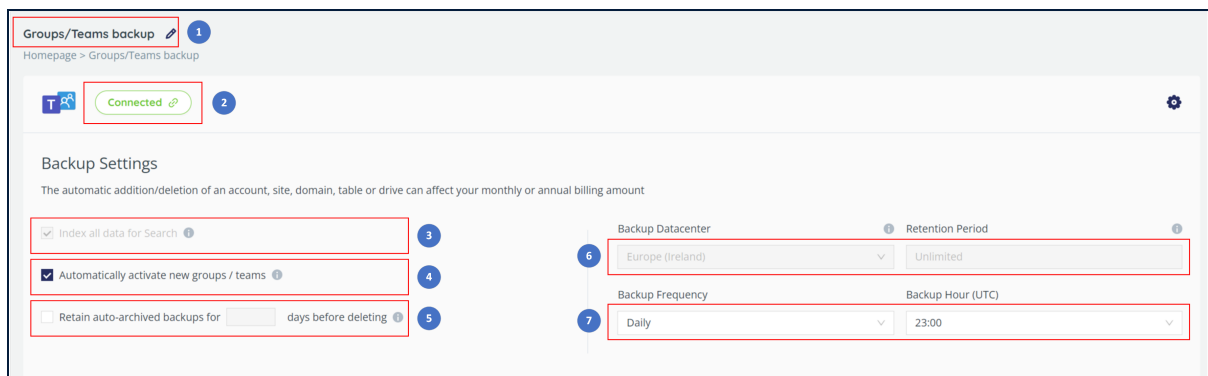
1. Sign in to your Account, or if you are already signed in, click the **Homepage** option in the Navigation Panel.
2. On the Homepage, click **+ Add Backup Task**.
3. Click the Teams & Groups service.
4. Fill in the name of the backup task.
5. You will see the OAuth based authorization Click **Authenticate** to start the process of granting the access token. You will be redirected to the *Microsoft sign-in* page. Enter Global Admin credentials to sign in to your Microsoft account.


#### IMPORTANT!

The user that you enter must have Global Admin permissions.

### 4.4.2 Configuring an Microsoft 365 Teams & Groups Backup Task

This set of options enables you to select the backup settings for the Account, Site, Team or Group. Click the settings  icon on the top right side of the screen.



1. You can change the name of the backup task by clicking  .
2. The icon to the right of the Microsoft 365 logo displays whether the application was able to connect to the specified Microsoft 365 account. To grant the application a new token, click on the icon to open the authentication dialog, and repeat the authentication process.
3. By default, the “Index all data for Search” option is selected, which enables CloudAlly to provide you with its granular search and restore functionality.
4. The Automatically activate new groups/teams option instructs the system to detect new teams and groups, and activate them automatically.
5. Backups are automatically archived when an entire site is deleted. The **Retain auto-archived backups** option allows you to retain them for a specified number of days, after which they will be deleted. Otherwise, the backups will be retained indefinitely.
6. The **Backup Data Center** field displays the Data Center location you selected when you signed up with your registration.
7. **Backup Frequency and Backup Hour** - This is the same as [Microsoft Exchange](#).

### 4.4.3 Activating Your Backup Tasks

Once you have configured your backup settings, you need to **Activate** them, in order for them to begin backing up your data.

For instructions, see ["Activating Your Backup Tasks."](#)

## 5 Managing Your Account

### 5.1 User Management

The page provides tools for fine-level control of the permissions and access levels of your users.

**Settings**  
Settings > User Management

The following external credentials are currently linked to your CloudAlly account  
You can remove the credentials anytime if you prefer to use only your CloudAlly sign-in credentials

[+ Add new user](#)

Email	Type	2FA Authentication
m.steward@cloudally.com	Email	
j_armstrong@cloudally.com	Email	
kristen_hall@cloudally.com	Email	

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Click **+ Add new user** to create a new user and start the configuration procedure for that user, or the pencil icon to edit an existing user's settings. The settings include the operations permitted to the user and the list of available services:

**Note:** Selecting the role "Administrator" enables permissions to all services and operations.

**Settings**  
Settings > User Management > New user

Email:  Type:

Password:  Role:

**Operations**

- General
  - View Account setting page
  - View billing page and manage payment details
  - View support page
  - View account activity
  - Show all your support tickets
  - Manage Notifications
  - View backups page
- Backup Tasks
  - Activate new backup tasks
  - Modify backup tasks
  - Delete backup tasks
  - Pause backup tasks
  - Execute backup tasks
  - Cancel backup tasks
  - View backups tasks
  - Preview backed up data
  - Restore backups
  - Export backups
  - Delete backup items - GDPR Right to Erasure

**Services**

- All
  - Microsoft Exchange
  - Microsoft Groups / Teams
  - Microsoft SharePoint
  - Microsoft OneDrive
  - Google Account
  - Salesforce
  - Dropbox
  - Box
  - Google Workspace
  - Google Shared Drives
  - IMAP

**SAVE** Cancel

To save changes, scroll to the bottom of the page and click **SAVE**.

## 5.2 Notifications Settings

This menu option enables you to manage your system notifications.

From the Navigation Panel, click **Settings > Notifications**.

The following screen will appear:

**Settings**  
Settings > Notifications

**Summary Report**

Report Format:

- Backup tasks overview [Preview](#)
- Backup failure details [Preview](#)

Report Frequency:

Provide as:

- CSV Attachment
- Download Link

Send the report only in case of backup failure

**SAVE**

Send Notifications To: [+ Add new recipient](#)

Email	Display Name	Summary Report	Recovery Notification <sup>i</sup>	Exceptions Notification <sup>i</sup>	Auto Discovery Notification <sup>i</sup>	Smart Alerts <sup>i</sup>	Action
m.steward@cloudally.com	Max Steward	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">✎</a> <a href="#">✖</a>

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The top of the screen enables you to configure the following options:

- Report Format: Backup tasks overview vs. backup failure details
- CSV Attachment vs. Download Link
- Report Frequency: daily, weekly or monthly
- Send the report only in case of backup failure

**To set up a new recipient:**

1. Click **+ Add new recipient**.
2. Enter the Email of the recipient and the Display name. The Display name is used in the report email to address the recipient.
3. Select the desired notification types:
  - a. Summary Report
  - b. Recovery Notification
  - c. Exceptions Notification
  - d. Auto Discovery Notification
  - e. Smart Alerts
4. Click **SAVE** to create the new recipient. You may need to scroll to the bottom of the page to find **SAVE**.



**Settings**  
Settings > Notifications > New Email report

**User Info**

Email  Display Name

**Notifications**

Summary Report  Recovery Notification  Exceptions Notification  Auto Discovery Notification  Smart Alerts

**SAVE** **Cancel**