

Are Microsoft 365 backups needed?

It's a topical question, and I wish I could boldly give you a clear-cut answer, YES or NO?

However, the answer isn't that clear cut.

Let's break this down into 3 simple questions:

1. What Microsoft 365 license plans do you have?
2. Are you using all the recovery features of your license plan to their full extent?
3. Is your Business compliance, or Business Sector subject to any specific IT requirements around Data storage & Backups?

The real answer to this question, is a rather subjective one and it is; where your business lays according to those 3 key questions.

And so, let's explore this in a bit more detail:

Firstly, Microsoft 365 does include backups. But I make the point they are not 'Backups' as you would expect in the On-Premise world with local Servers & Applications (there being backup each night onto removable storage, then taken offsite. The old backup 3-2-1 rule). The backups are part of this transition and mindset from the On-Premise world into the Cloud world, with the 'Software as a Service' providers handling it in the best way for their service.

Microsoft have to deliver on their Service Level Agreements for the 365 services that you are paying for. In a nutshell; they need to provide its availability (it's redundancy and resiliency across its distributed service network that spans datacentres, regions and continents).

And so with this in mind we do need to place some trust in Microsoft (as they built this platform!) to support it, and provide it to us as best they can.

But do we just presume, and trust that all our data is backed up by Microsoft? And that we can easily recover it when needed? Of course not! And this where we need to answer those 3 questions in detail:

1. What M365 license plan do you have?

Not all Microsoft 365 licenses are equal!

As an example; we can license through standalone licenses like Exchange Online only (be that Plan 1 or Plan 2 with clear differences between them). We can also license through the more common bundles plans like the 'Business ***' licenses (typically consisting of the Plan 1 features), and the 'Enterprise ***' licenses (typically consisting of the Plan 2 features), which again have significant differences between them. And should you have a mix of these licenses, then keeping tab on what features your users are entitled to can cause a headache.

2. Are you using all the recovery features of your license plan to their full extent?

Ok, so you have your Microsoft 365 licenses, but are you using all the inbuilt features to their full potential in order to protect your data? For example: Recycle Bin settings, Retention Policies & Legal Holds?

3. Is your Business, Sector subject to any specific IT requirements around Data storage & Backups?

Compliance around data handling, retention policies, or backups offsite?

And so with these I mind, let's explore some of the common Microsoft 365 services and see what they offer in terms of Recovery, and Data Protection.

Now Microsoft don't use the word 'Backups', but the way the service is built, the recovery is all built into the Recycle Bins, Retention Policies, and Legal Hold settings (which as previously mentioned differ depending on which licence plan you have).



Exchange Online has 14 days of 'Deleted Items' by default. Unless this is tweaked, then effectively you have 2 weeks' worth of 'backups'. Of course, this setting of 14 days is the default, and Yes, it can be extended up to 30 days, and I strongly suggest this is done!

The restoring of this data is achieved at the User level, and so your users can be self-sufficient in managing this themselves.

Now let's talk Retention Policies & Legal Hold settings. If you have a 'Business' plan (so Business Basic, Standard, Premium) these all come with the 'Exchange Online Plan 1' license, which do NOT include Retention Policies or legal holds. Restoring any data is down to an Admin with PowerShell scripting skills, and the time that takes to complete.

Drilling further down into Exchange Online, we have 'Shared Mailboxes' (which are a great FREE utility), but unfortunately do not get the Retention Policies or Legal Hold features unless they too are upgraded to 'Exchange Online Plan 2'. And so this is an easy one to miss!



SharePoint Online has a recycle bin that is accessible for a total of 93 days (so 3 months), and this is again easy for your Users to view and recover for themselves.

However, should a user empty the recycle bin before that 93 days is up, then that data gets put into a 'Secondary Recycle Bin' for the remaining days until 93 days have expired. Restoring any data is again down to an Admin.



OneDrive Online is very much like SharePoint above. Users can self-recover through the Microsoft 365 portal, and have 30 days of recycle bin history to restore from.

Should an employee leave and their user account is deleted, you easily can grant that users manager, or colleague, access to that data for a period of 30 days. In addition, you can tweak the settings to retain that deleted users data for up to a period of 10 years (but this tweak has to be done in advance in the OneDrive Admin portal at an organisational level first before it takes affect). However, this won't catch any files this user may have deleted in the weeks/months before they parted.

Recovering a deleted users data needs an Admin with PowerShell skills plus the time taken to get that data recovered.

Thinking around the threat of Ransomware on files and folders, the folders and files synced to OneDrive are not exempt from this threat, and so there needs to be a mechanism to restore these files and folders, and restore them swiftly! Microsoft 365 does have a built-in 'Restore your OneDrive' option with up to a maximum of 30 days history to choose from, which may be suitable for most organisations.



Microsoft Teams is a tricky one as Teams is not a product in-itself. It is made up of the following: an Azure AD Group, Exchange Online Mailbox and a SharePoint site. And so capturing all this data is done via the single components we have already discussed previously (Exchange Online, SharePoint etc). You get 30 days to recover any deleted Team messages via Exchange, and 93 days to recover the site contents via SharePoint, and again all these can be extended if you have the right kind of licenses in your tenant (Enterprise level 'Plans 2' licenses to enable the Retention Policies and Legal Holds), and then making sure that all those bells and whistles are enabled and working.

Restoring data for Teams is achieved many ways depending on the age or type of data via the Admin Portals, and PowerShell scripts by an Admin.



Dynamics 365 "CRM" Products like Customer Engagement (CE) for example is built on the Azure platform, and they include continual backups within the service, enabling you to go back 28 days to previous backups.



Dynamics 365 Business Central similarly to the CRM products handle all backups in the background for you. Though they have only recently announced (APRIL 2021) that you can now download offline manually, or revert to a backup within the last rolling 30 days.



The last item to cover is the **Microsoft 365 eDiscovery Compliance**. Within Microsoft 365 this is only available to Enterprise Level licenses. Now we don't "back this up" but it's the gateway to pulling

data out of the Retention Policies & Legal Holds, and reviewing data for any litigation or GDPR SAR requests for data. In order to use this useful tool you need to choose the users in your organisation that you wish to hold that data for, but it does require the Enterprise Plans level of licencing.

Now we've covered what you get out of the box with Microsoft 365 depending on the Plan level of licenses you have, we need to relate that your business or contractual needs by:

- Checking the advanced settings to optimise the licenses you have.
- Then make a judgment if there are any gaps or greater business needs that suggest you implement an external backup of Microsoft 365.

And to put all this we've discussed into real-life scenario's that I've seen, here are a couple to ponder on, and relate them to your own business:

- You need to recover Exchange data older than 30 days (be that from a user who is slow to report missing mail, or from a litigation filed against your business and you need to retrieve that data). But you only have the Business Standard licenses, so no Litigation Hold or Retention Policies.
- Likewise for SharePoint; a file or folder of historic data was removed, but you were not aware of this until outside of the 93 days of the recycle bin expiry. No Retention Policies on hand to search and restore from.
- Having to recover a deleted customer record from the D365 Customer Engagement app that had gone unnoticed for over 30 days.

And so in a pure numbers, each Microsoft 365 product has a recovery window of around 30 days (extendable with Retention Policies & Legal Holds). Dynamics 365 products are also extended to offer recovery up to 28-30 days.

And if you are currently using any of these Microsoft 365 licenses that we have discussed, then we need to ask the question "are these recovery offerings sufficient for your business needs?"

If these do meet your needs, then do check and make sure that the Deleted Item retention is turned on, and that your users have the right level of license applied to them so that the advanced Retention Policies and Legal Holds can be setup and turned on (if they are not already).

If these do not meet your needs, then a solution like our **Backup as a Service** (BaaS) powered by **Commvault** is a great external backup tool to Microsoft 365 products.

Backup as a Service powered by Commvault

This solution wrap for Microsoft 365 comes in at a few different levels to provide benefit, either as an 'Off-the-shelf Service' product or as a 'Managed Service'. Four quick points where our BaaS offering can provide benefit to Microsoft 365 are:

1. 'Backup as a Service' is a great addition to the Standalone or Business level (Plan 1) licenses to give you a greater restore time window compared to the Microsoft defaults. And it also offers eDiscovery and Compliance without having to upgrade to the Microsoft 365 Enterprise level licenses where cost might be a factor.
2. It's also a great addition to the Enterprise level licenses where you have a mixed estate of Microsoft 365 cloud services and local Servers, and so to pull the eDiscovery and Compliance/GDPR under one solution rather than two or three siloed applications.
3. Lastly, if you are required to keep a backup of your data outside of the Microsoft 365 services, then our solution is stored in Tier4 UK datacentres away from Microsoft 365 and Azure.
4. Simple quick restores via the BaaS portal, no PowerShell scripting needed.

Conclusion

And so in conclusion, my personal opinion is that the tweaked 'Deleted items' and Recycle Bins, along with the Retention Policies & Holds, are great features! And if you are entitled to them, then switch them on and use them, as it makes recovery so much easier should you ever need to.

However, they are designed to be inside the Microsoft 365 solution only, and there is no external copy of your data that you can easily access, or request access to. And as long as the Microsoft 365 services are functional and operational, your data is limited to those retention periods/holds that we have highlighted.

And this is where I emphasise that should you review all this, and look for those gaps, and if any are found then make sure a suitable solution is implemented. And in most cases this is where a proven, mature, external backup solution fits in. And with such a solution, there is no maybe, and there is no question or doubt of you getting access to your data should the worst even happen.

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