

Getting Started Guide

Setting Up Microsoft 365 as an Administrator

April 1, 2021



techsoup



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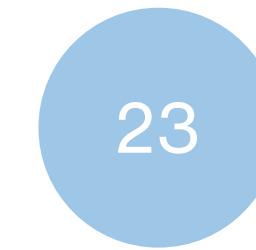


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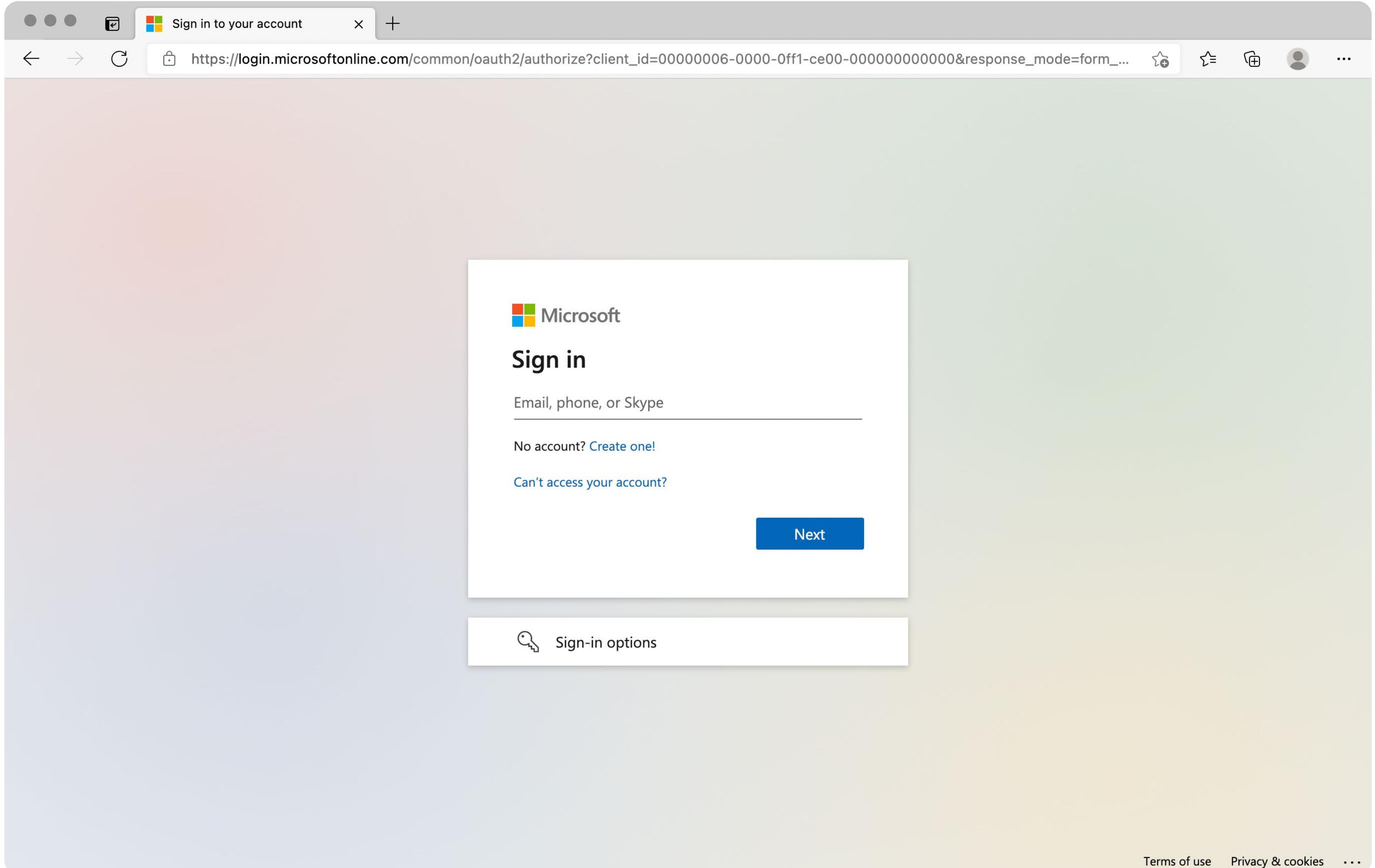
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A close-up, side-view photograph of a young man with dark hair and a beard, smiling as he looks down at a laptop screen. He is wearing a tan button-down shirt over a white t-shirt. The background is a warm, orange-toned wall.

Logging In to the Microsoft 365 Admin Center

Go to

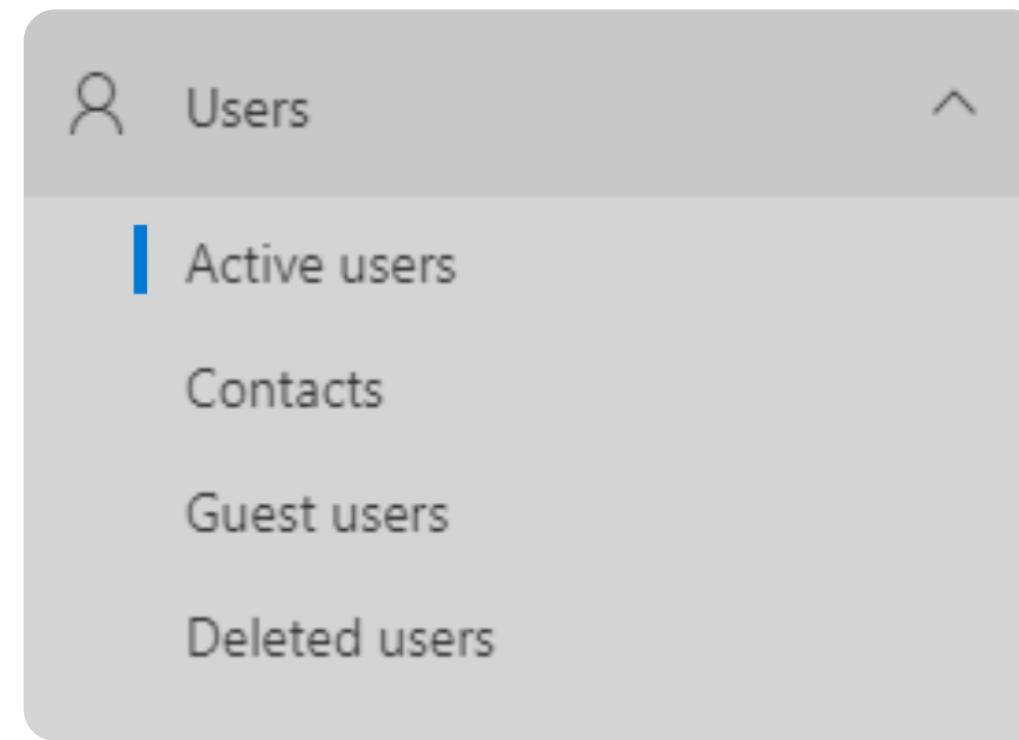
<https://admin.microsoft.com>
and sign in with your
.onmicrosoft.com credentials.



A professional woman with dark hair and bangs, wearing a dark grey blazer over a white collared shirt, is seated at a table in a bright room with large windows. She is smiling and looking down at a laptop computer. A white coffee cup is on the table in front of her. The background is slightly blurred, showing greenery outside and some indoor furniture.

Adding, Activating, Editing, and Deleting Users

Adding Users and Activating Licenses



1

Go to <https://admin.microsoft.com> and sign in with your `.onmicrosoft.com` credentials.

2

Click **Users**; then select **Active users** and **+Add a user**.

3

Add the user's information.

You can add more information for the user in the other sections by clicking on the appropriate section.

Set up the basics

To get started, fill out some basic information about who you're adding as a user.

First name Last name

Display name

Username Domains

Automatically create a password
 Require this user to change their password when they first sign in
 Send password in email upon completion

Next Cancel

4

In the **Password** section, you can choose how the user's initial password is generated. We recommend auto-generating a password.

Password settings

Auto-generate password

Let me create the password

Require this user to change their password when they first sign in

Send password in email upon completion

Enter the email of the user who will receive the login credentials and a link to log in.

Send password in email upon completion

Email the new password to the following recipients *

Assign product licenses

Assign the licenses you'd like this user to have.

Select location *

Licenses (2)*

- Assign user a product license
 - Microsoft 365 Business Basic
6 of 7 licenses available
 - Office 365 E1
7 of 7 licenses available
 - Power BI (free)
Unlimited licenses available

Create user without product license (not recommended)

They may have limited or no access to Office 365 until you assign a product license.

Apps (23)

Back

Next

The **Product Licenses** section will include the full list of all your nonprofit's active (current) licenses.

5

Click on the license to assign one of those licenses to your user. You can turn off specific features of each assigned license.

6

Once you have completed setting up the new user account, click **Next** to finalize adding the user.

Optional settings

You can choose what role you'd like to assign for this user, and fill in additional profile information.

Roles (User: no administration access)

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 (i)

Global reader (i)

Helpdesk admin (i)

Service support admin (i)

SharePoint Administrator (i)

Teams Administrator (i)

User Administrator (i)

All new staff you add to your Microsoft tenant will default to **User (no administrator access)** accounts.

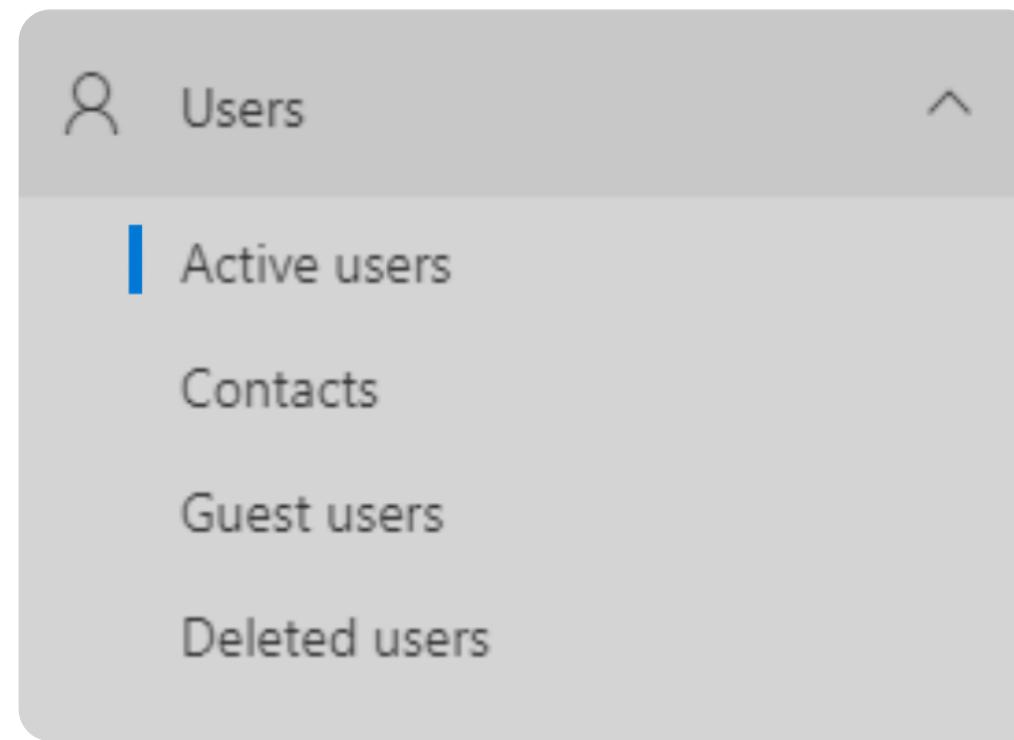
To assign a different role to your user, simply select the most appropriate role.

Note

Global Administrators have access to all the controls in Microsoft 365.

If you want to give access to only one part of your Microsoft tenant, you can make them a **Customized Administrator** and select which role to assign them admin privileges to (to SharePoint, for example).

Editing Users



- 1 Go to <https://admin.microsoft.com> and sign in with your `.onmicrosoft.com` credentials.
- 2 Click **Users**; then select **Active users**.
- 3 Select the user you want to edit. This will open a slide-out window with the user details. You can search the list of users by display name or email address.

A screenshot of the 'Active users' list in the Microsoft Admin Center. The list shows a single user entry: 'User TechSoup' with the email 'user@techsoup.onmicrosoft.com'. A blue box highlights this user entry. To the right of the list, there is a slide-out window showing the user's details. The slide-out window has a title 'Active users' and includes a 'Search' input field. The user details shown are: 'Display name' (User TechSoup), 'Username' (user@techsoup.onmicrosoft.com), and 'Licenses' (Power BI (free)). There are also buttons for 'Add a user', 'Add multiple users', 'Multi-factor authentication', 'Delete a user', 'Refresh', 'Reset password', 'Export users', and 'Choose columns'.

You can

Manually reset the user's password.

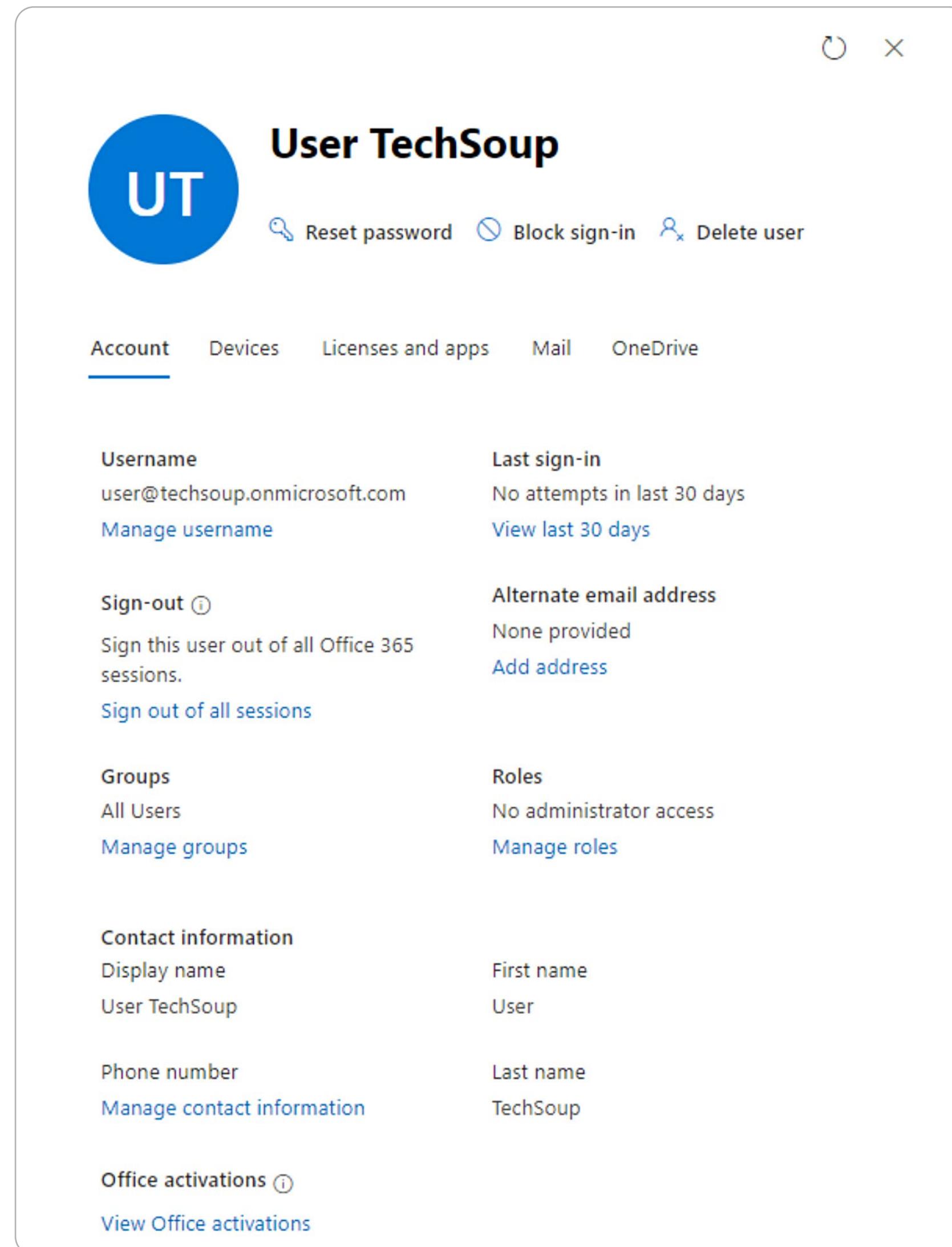
Block the user from sign-in.

Delete the user.

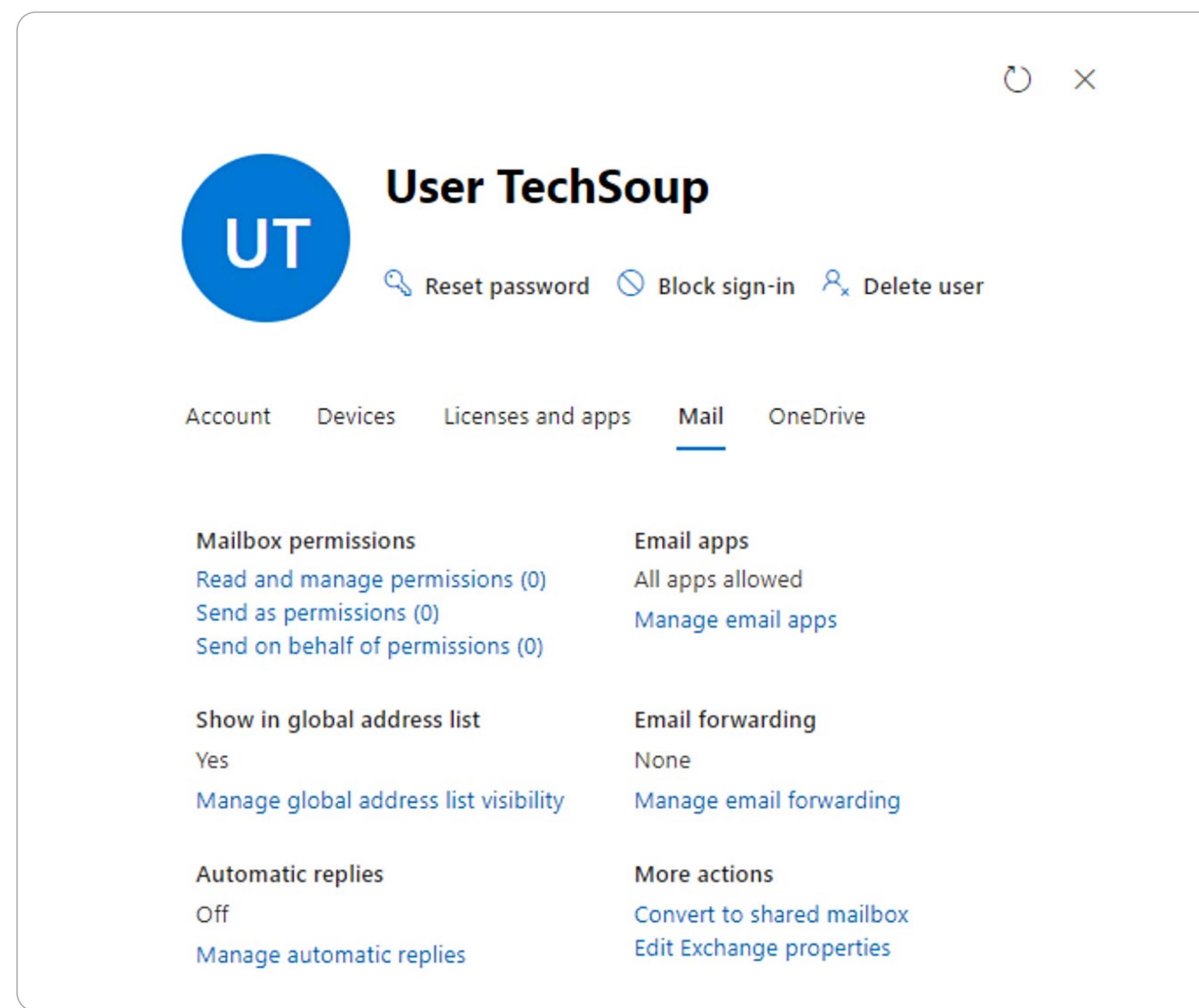
Edit and change many of the user's settings, including:

- Email aliases
- Product licenses (adding, editing, or removing them)
- Role (**Note:** Only a *Global Administrator* can do this)

Change their email and OneDrive settings.

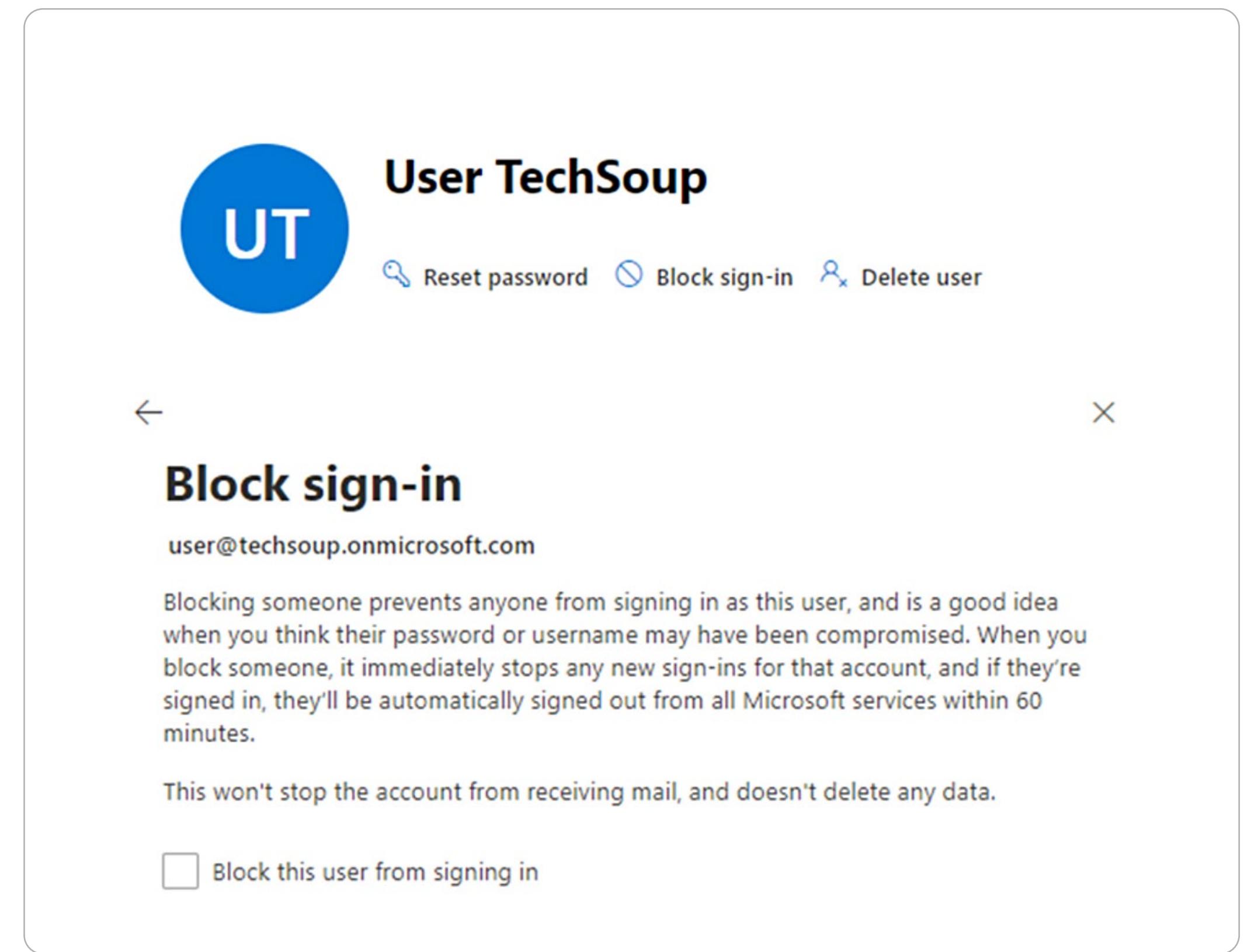


The **Mail** section allows you to forward all emails coming into the user's Outlook to another email address, set up mailbox permissions and automatic replies, etc.



The screenshot shows the Microsoft 365 Admin center interface. The user profile 'User TechSoup' is displayed with a blue circular icon containing 'UT'. Below the profile are three actions: 'Reset password', 'Block sign-in' (which is currently selected and highlighted in blue), and 'Delete user'. A navigation bar at the top includes 'Account', 'Devices', 'Licenses and apps', 'Mail' (which is underlined in blue), and 'OneDrive'. The 'Mail' section contains the following settings:

Mailbox permissions	Email apps
Read and manage permissions (0)	All apps allowed
Send as permissions (0)	Manage email apps
Send on behalf of permissions (0)	
Show in global address list	Email forwarding
Yes	None
Manage global address list visibility	Manage email forwarding
Automatic replies	More actions
Off	Convert to shared mailbox
Manage automatic replies	Edit Exchange properties



The screenshot shows the 'Block sign-in' configuration page for the user 'user@techsoup.onmicrosoft.com'. The user profile 'User TechSoup' is at the top, with a blue circular icon containing 'UT'. Below are three actions: 'Reset password', 'Block sign-in' (which is currently selected and highlighted in blue), and 'Delete user'. A back arrow and a close 'X' button are on the right. The main content area is titled 'Block sign-in' and contains the following text and input field:

user@techsoup.onmicrosoft.com

Blocking someone prevents anyone from signing in as this user, and is a good idea when you think their password or username may have been compromised. When you block someone, it immediately stops any new sign-ins for that account, and if they're signed in, they'll be automatically signed out from all Microsoft services within 60 minutes.

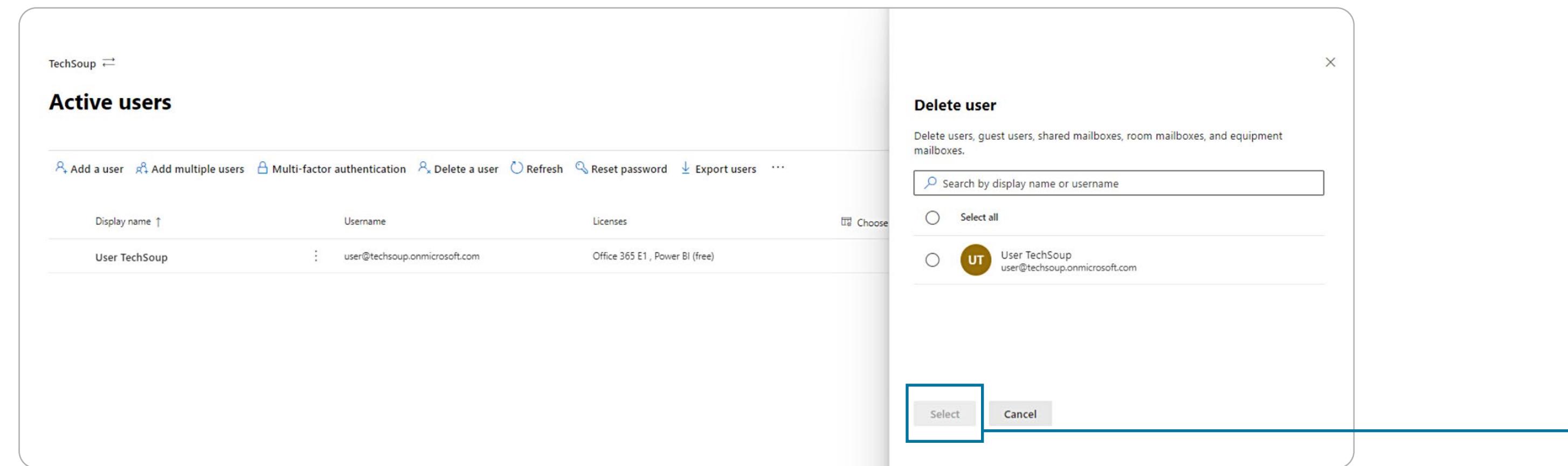
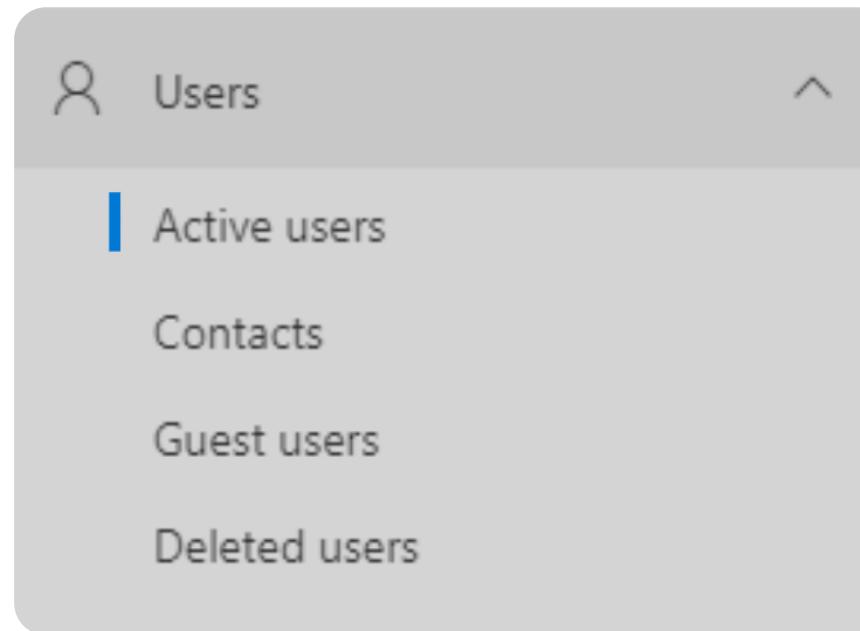
This won't stop the account from receiving mail, and doesn't delete any data.

Block this user from signing in

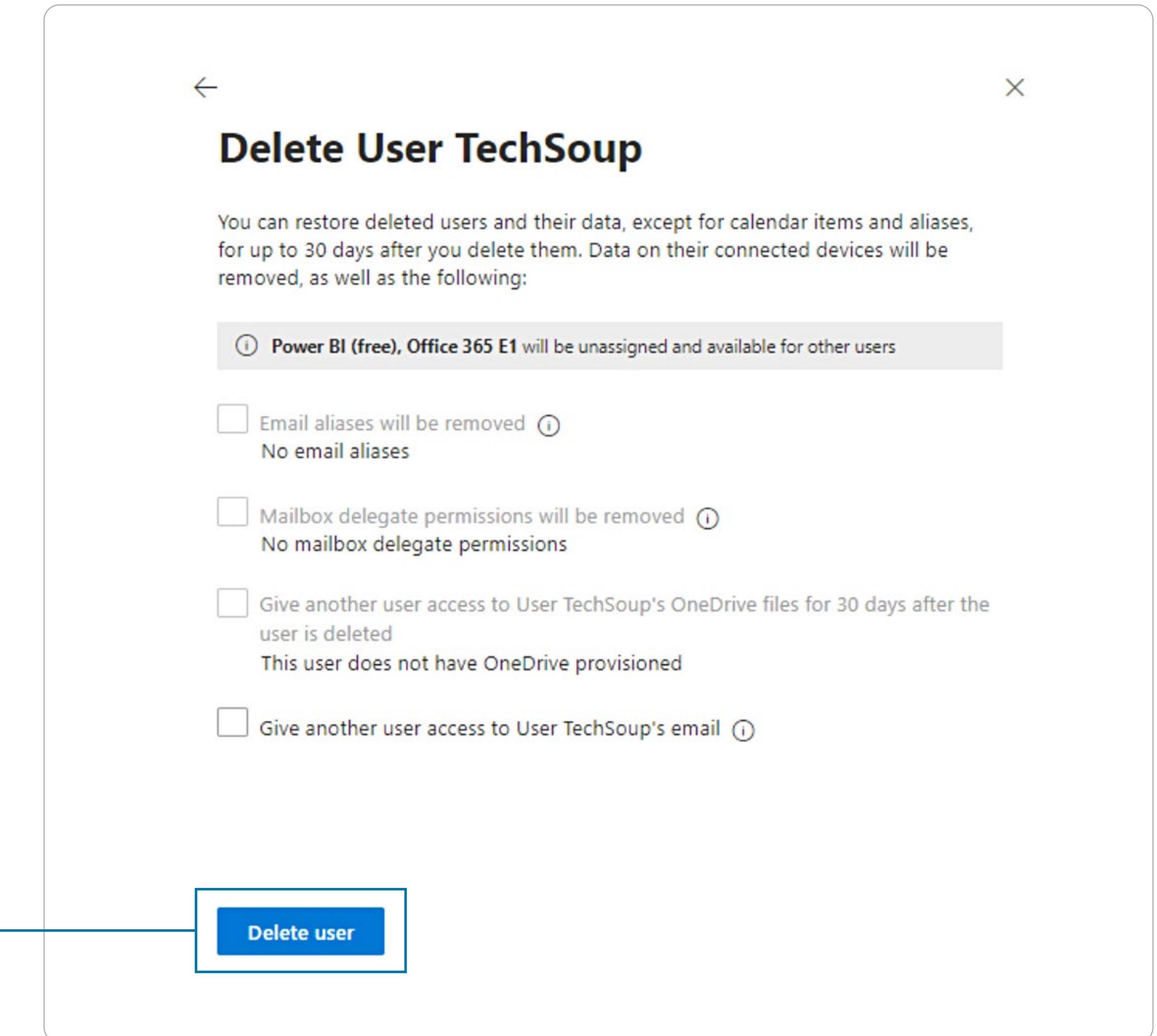
Block sign-in can be used to block that user from signing in to your Microsoft tenant and accessing the data stored there or from using the applications included in their provisioned licenses.

Deleting Users

- 1 Go to <https://admin.microsoft.com> and sign in with your `.onmicrosoft.com` credentials.
- 2 Click **Users**; then select **Active users** to display a list of your active users.
- 3 Click **Delete a user**. This will open a slide-out window (see below).
- 4 Search for the user you would like to delete.
- 5 Click **Select**.



6 Click **Delete user** to confirm that you wish to delete the user account.



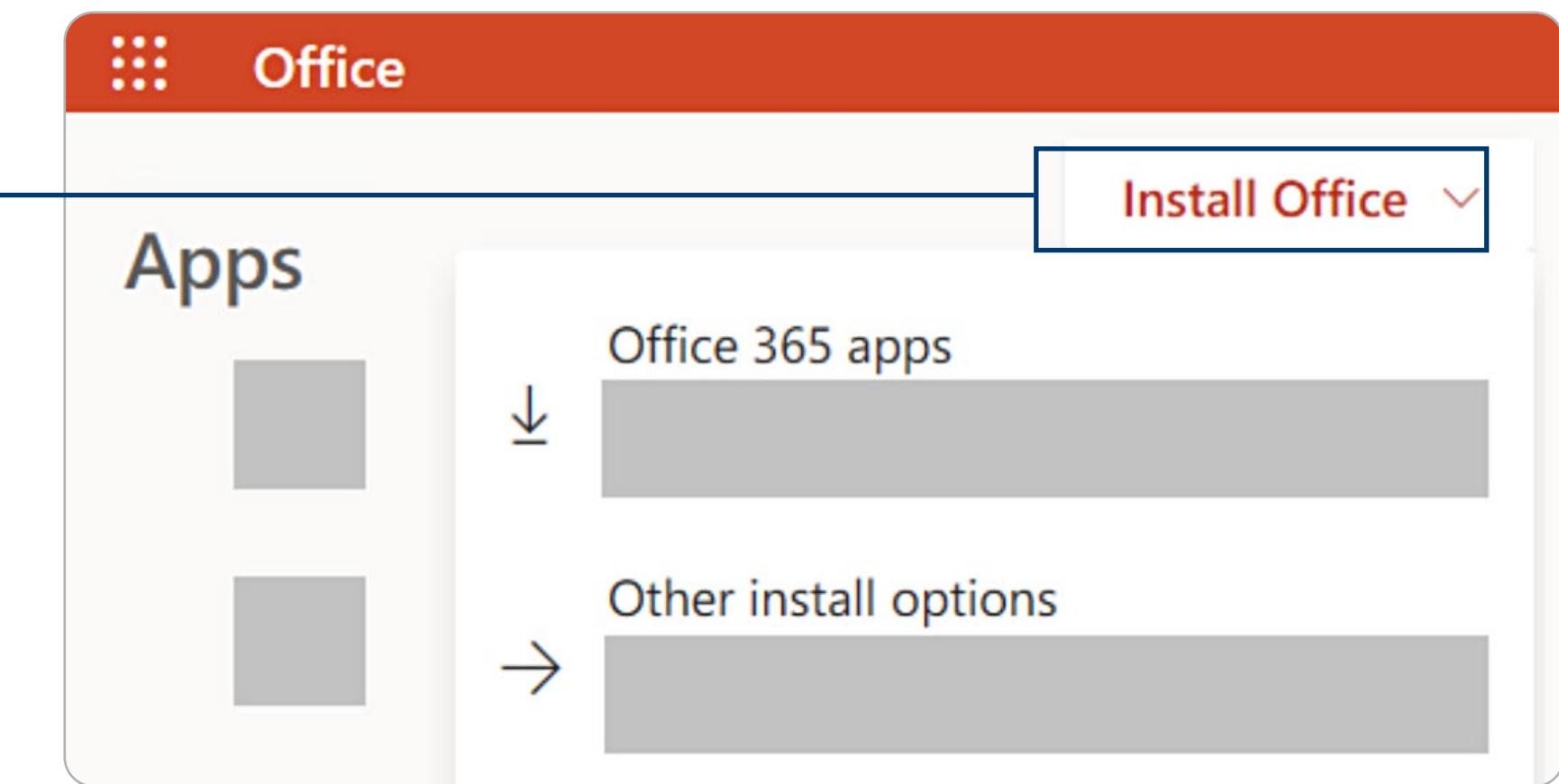


Installing and Accessing Office Desktop Applications

Installing Office Desktop Applications

Each user can install Office desktop applications. You do not need to be an administrator to complete the below steps.

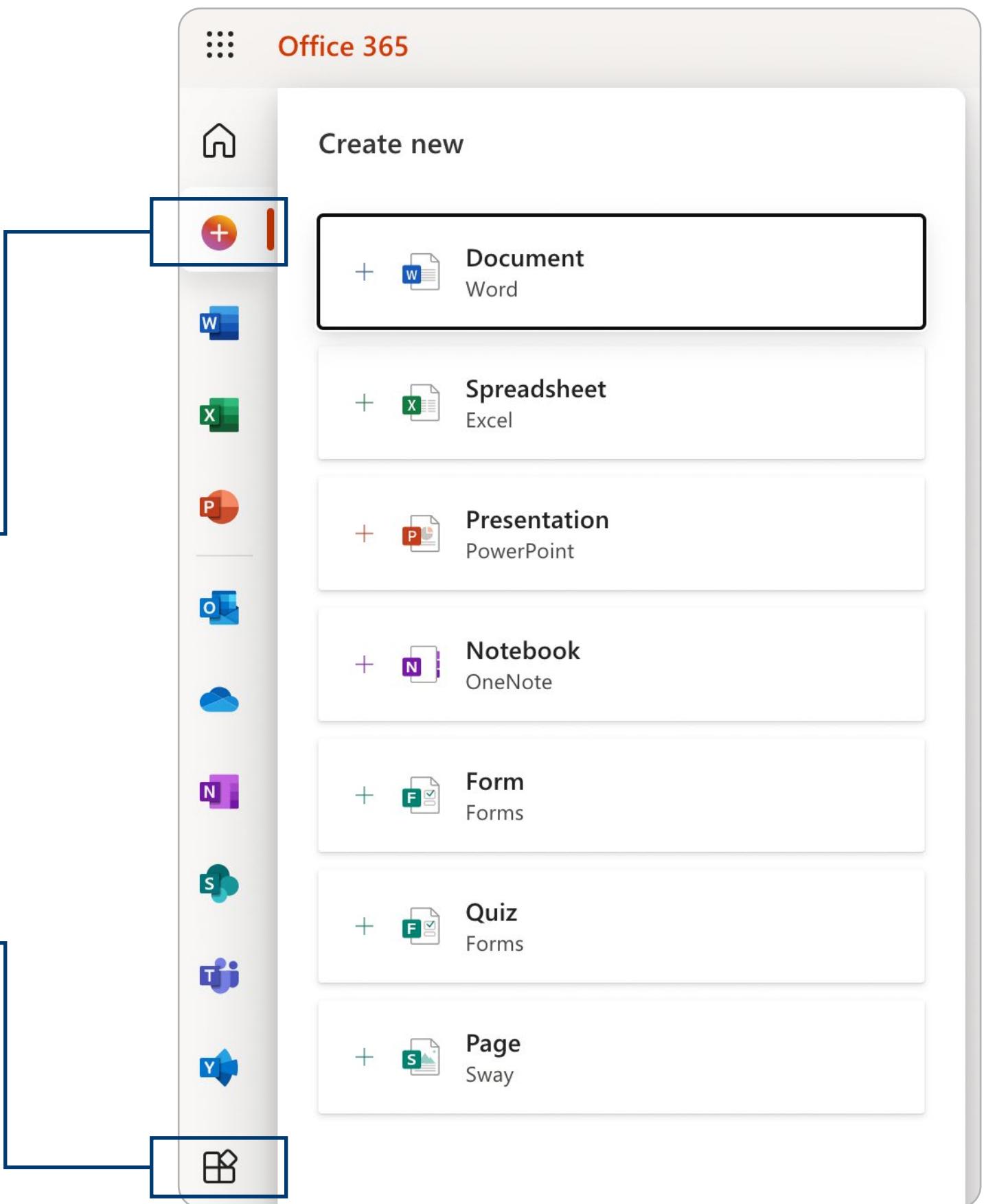
- 1 Go to www.office.com, and if you're not already signed in, click **Sign in**.
- 2 Sign in with an account to which you have assigned a license that contains downloadable apps. For example, Microsoft 365 Business Premium.
- 3 After signing in, from the home page click **Install Office**.
- 4 Select **Office 365 apps** to begin the installation in your Windows machine or Mac machine.



- 5 Follow the prompts in the window installation. Your install is finished when you see the message **"You're all set! Office is installed now."**
- 6 Begin using your apps in your desktop.

Accessing Office Web-Based Applications

- 1 Go to www.office.com, and if you're not already signed in, click **Sign in**.
- 2 Sign in with an account to which you have assigned an Office 365 or Microsoft 365 license.
- 3 After signing in, from the home page click the **+** (plus sign) for easier access to create new documents.
- 4 You can select any **app** located in the left side bar to start, view, or collaborate on a document.
- 5 If you would like to access **more apps**, select the last icon in the bar to see the full menu.
- 6 Begin using your web-based apps.



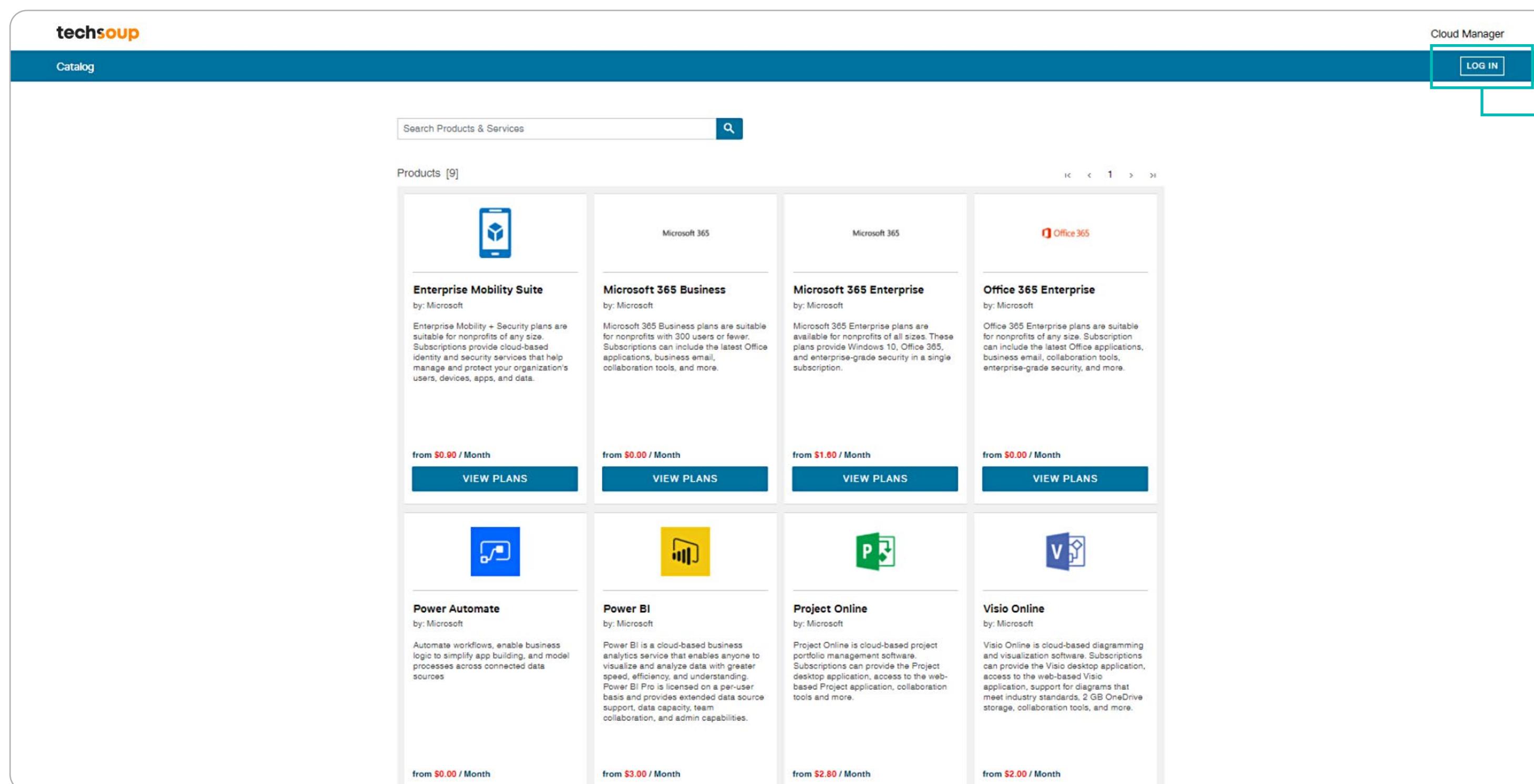
Obtaining Additional Licenses and Services Through TechSoup



1

To obtain additional Microsoft cloud licenses, you will need to log in to the Cloud Manager account. You can access Cloud Manager via one of the following methods:

Via cloud.techsoup.org



a

Click the **LOG IN** button on the top right-hand corner of the screen.

b

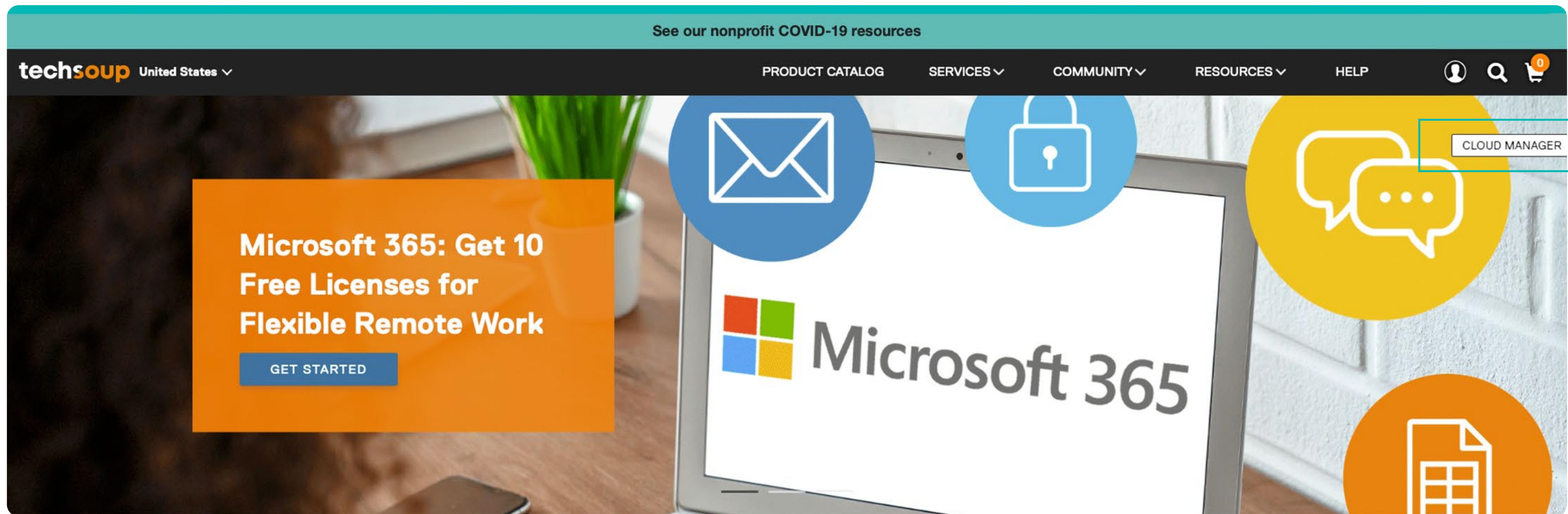
Log in using your TechSoup credentials.

Via techsoup.org

a Log in using your TechSoup credentials.

b The **CLOUD MANAGER** button will appear below the shopping cart icon after you log in.

c Click the **CLOUD MANAGER** button and you will be directed to the Cloud Manager home page.



2 Click **Subscriptions**.

3 Navigate to the subscriptions you would like to add licenses to.

4 Locate the ellipsis menu.

The screenshot shows the TechSoup Subscriptions page. The navigation bar includes 'Products & Services', 'Subscriptions' (which is highlighted with a teal box and line), 'My WorkSpace', 'Invoices', and 'Support'. The main section is titled 'Subscriptions' and shows three active subscriptions:

SUBSCRIPTION	NEXT INVOICE	QUANTITY	UNIT PRICE	DISCOUNT	SUBSCRIPTION AMOUNT
Office 365 Enterprise E1 Office 365 (Nonprofit Staff Pricing) (Nonprofit)	2/25/2019	105 Licenses	\$0.00 / Month	0%	\$0.00
Office 365 Enterprise E3 Office 365 (Nonprofit Staff Pricing) (Nonprofit)	2/28/2019	5 Licenses	\$4.50 / Month	0%	\$22.50
Office 365 Enterprise E3 Office 365 (Nonprofit Staff Pricing) (Nonprofit) (ANNUAL)	6/20/2019	90 Licenses	\$54.00 / Annually		

A teal box and line point to the 'Subscriptions' button in the navigation bar. Another teal box and line point to the ellipsis menu (three dots) in the third subscription's row. A larger teal box and line enclose the ellipsis menu, which contains the following options:

- Buy Licenses (highlighted with a teal box and line)
- Buy add-ons
- Downgrade the subscription
- Cancel the subscription

5 Click **Buy Licenses**.

6 Add the required number of licenses and check out.

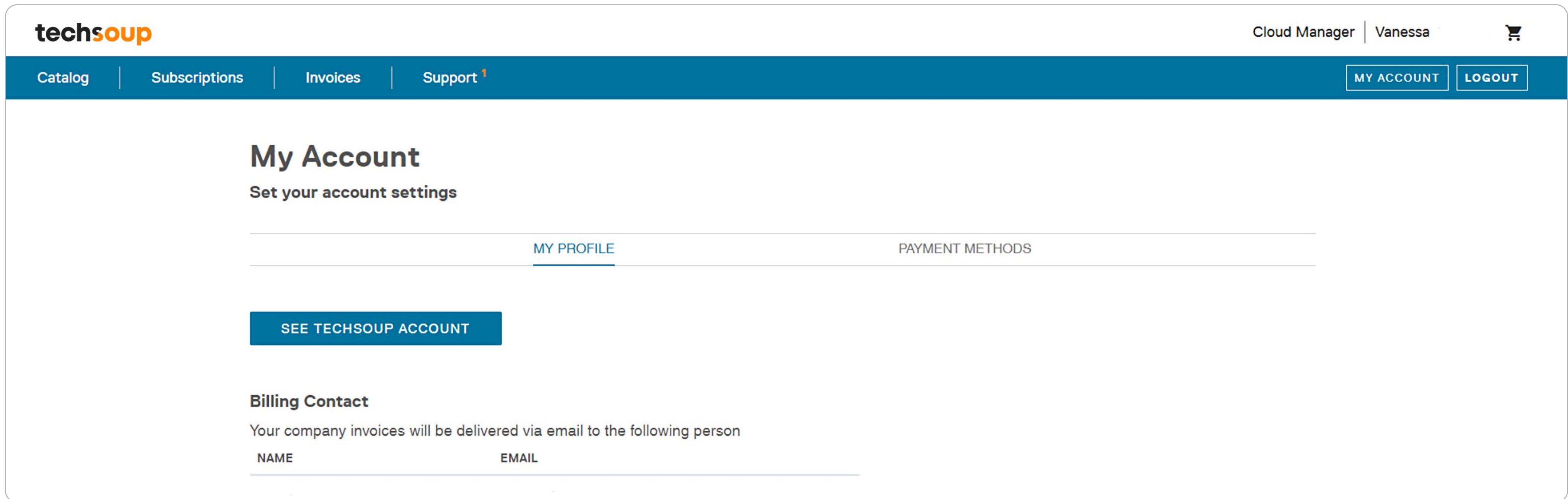
In addition to obtaining the additional licenses, you can also accomplish the following on the TechSoup Cloud Manager:

Access order history and invoices

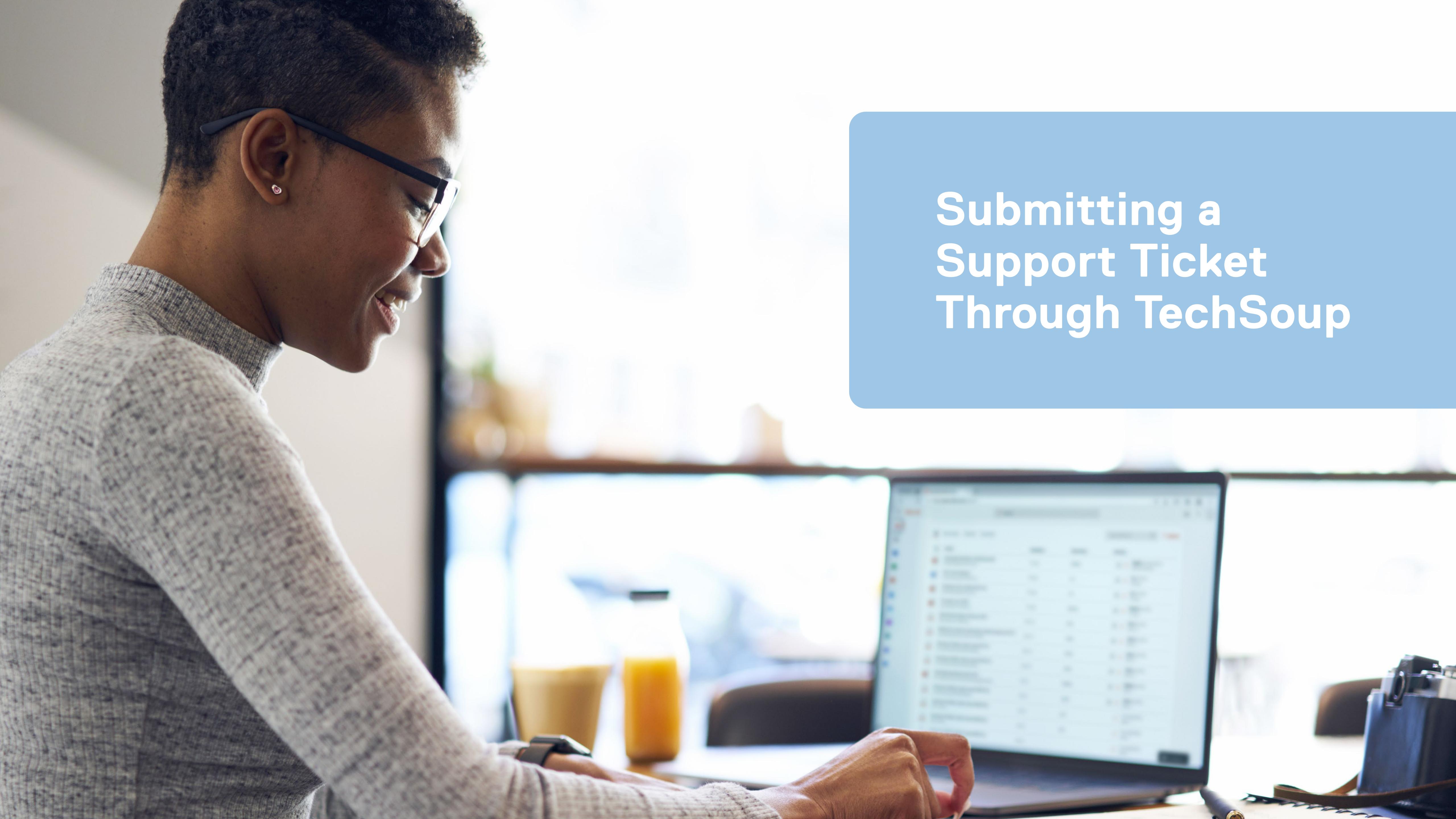
Add or update payment methods

Cancel subscriptions

Submit a support ticket



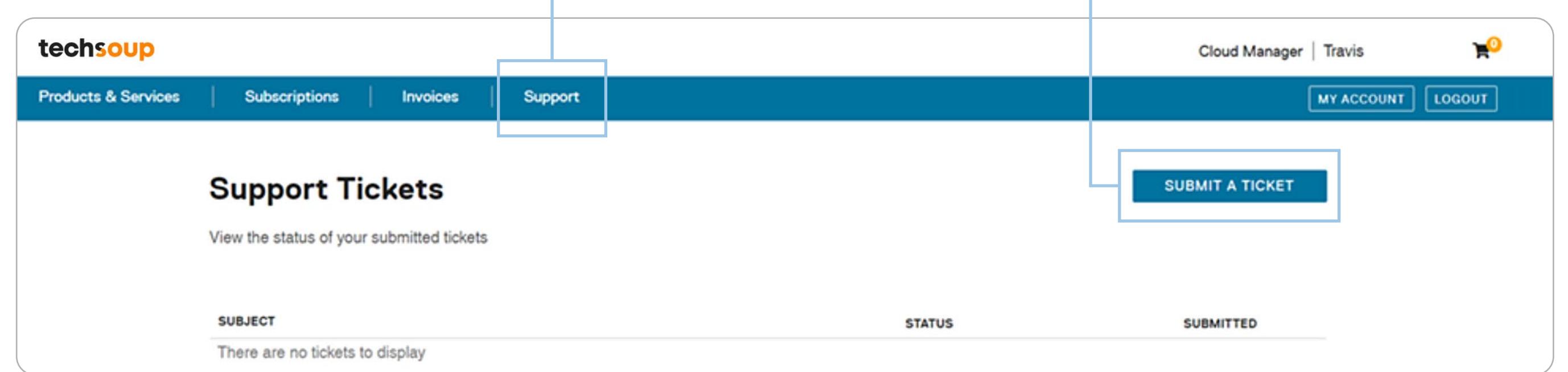
The screenshot shows the 'My Account' page of the TechSoup Cloud Manager. The top navigation bar includes links for Catalog, Subscriptions, Invoices, and Support (with a '1' notification). The user is identified as 'Cloud Manager | Vanessa' with a shopping cart icon. The main section is titled 'My Account' with the sub-instruction 'Set your account settings'. It features two tabs: 'MY PROFILE' (which is active, indicated by a blue underline) and 'PAYMENT METHODS'. A blue button labeled 'SEE TECHSOUPE ACCOUNT' is present. Below this, a 'Billing Contact' section is shown, stating that company invoices will be delivered via email to the following person. There are fields for 'NAME' and 'EMAIL' with a horizontal line separating them.



Submitting a Support Ticket Through TechSoup

To create a **Support Ticket**, log in to your Cloud Manager account (see slide 19 for details) and follow these steps:

1 Click **Support**.



2 Select **SUBMIT A TICKET**.

3 Fill out all the details in the intake form.

4 We will contact you very soon to fix your problem.

A man with short dark hair and a light beard, wearing a light blue denim shirt, is sitting at a desk and looking down at a silver tablet he is holding in his hands. He is positioned on the left side of the frame. The desk is light-colored wood and has a white keyboard, a white computer mouse, a yellow mug, and a green sticky note in the foreground. In the background, there is a potted plant on the left and a large window on the right that lets in bright light. A yellow rectangular box with a rounded top-right corner is overlaid on the image, containing the text.

**Additional
Resources
Available Through
TechSoup**

How Can TechSoup Help You?

SERVICES

We have **services** that range from license activation, migration, security assessment, and setting up multi-factor authentication to a full Office 365 Complete Setup that will help you get up and running.

You can reach us via one of the following methods:

Via phone **1-800-659-3579**.
Monday through Friday
from 7 a.m. to 12 p.m. Pacific time

Create a support ticket:
<https://page.techsoup.org/office-365-support-services>

TRAINING

We offer **training courses** for nonprofit staff and volunteers on how to use Microsoft applications such as Teams, Excel, PowerPoint, Word, SharePoint, and many other applications.

Start learning:
[https://techsoup.course.tc/
catalog?type=microsoft-digital-skills-center](https://techsoup.course.tc/catalog?type=microsoft-digital-skills-center)

COMMUNITY

Be a part of our community!
[http://forums.techsoup.org/cs/
community/f/112.aspx](http://forums.techsoup.org/cs/community/f/112.aspx)



We are here to help!

If you need help, do not hesitate in emailing us at

uscustomerservice@techsoup.org



Main Office

TechSoup
435 Brannan Street, Suite 100
San Francisco, CA 94107
415-633-9300
Email Customer Service at
customerservice@techsoup.org

Press Contact

Email PR at
PR@techsoup.org
415-633-9403

Affiliate Accounts

Organizations with multiple
members or affiliates, and those
looking to place donation requests
for 20 or more organizations,
please contact us at
mmd@techsoup.org.

Business Development

For those interested in
donating products, see
[Become a Donor Partner](#).