

Getting Started Guide

Setting Up Microsoft 365 as an Administrator




April 1, 2021



techsoup

Contents

-  3 Logging In to the Microsoft 365 Admin Center
-  5 Adding, Activating, Editing, and Deleting Users
 -  Adding Users and Activating Licenses
 -  Editing Users
 -  Deleting Users
-  15 Installing and Accessing Office Desktop Applications
 -  Installing Office Desktop Applications
 -  Accessing Office Web-Based Applications

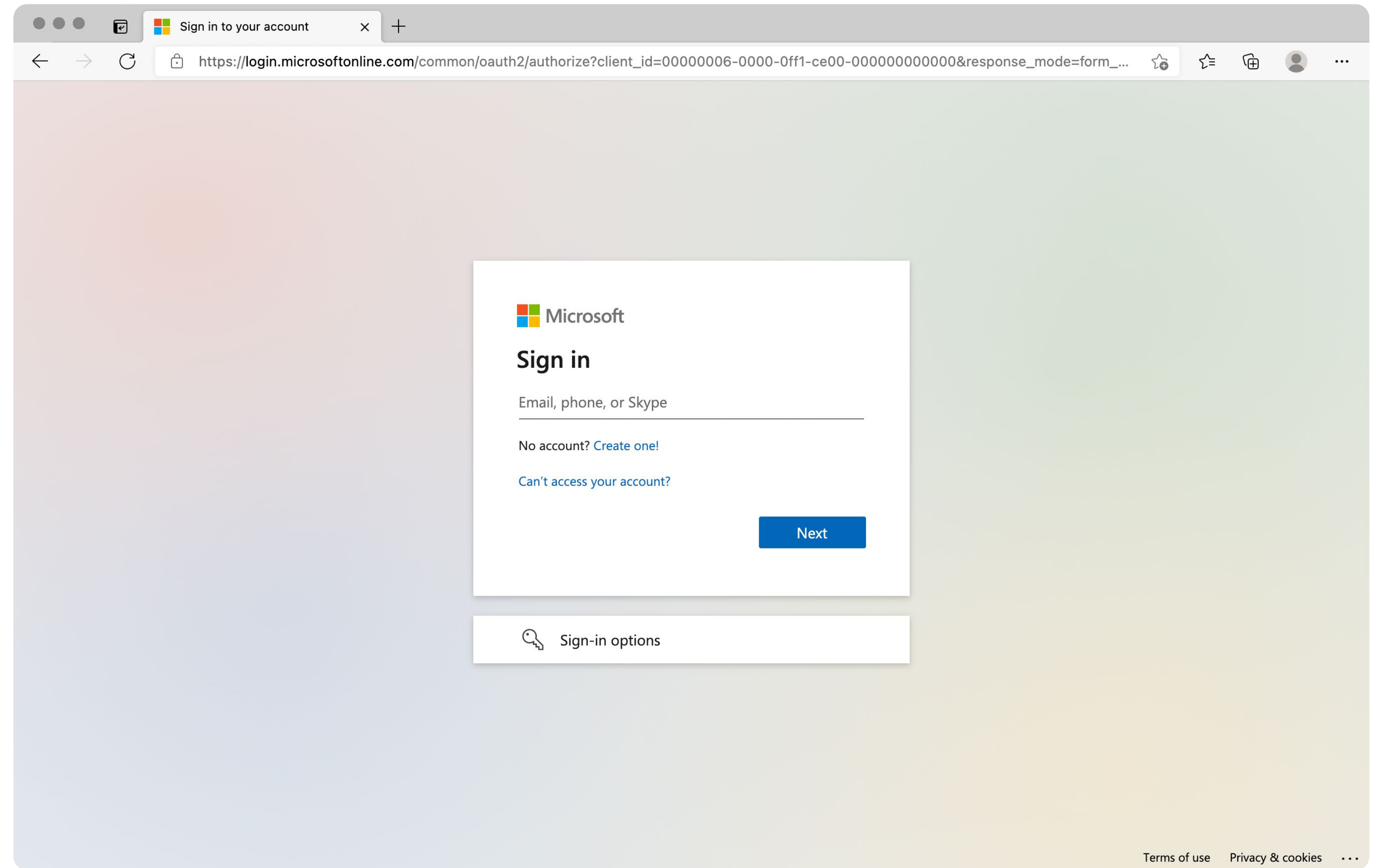
-  18 Obtaining Additional Licenses and Services Through TechSoup
-  23 Submitting a Support Ticket Through TechSoup
-  25 Additional Resources Available Through TechSoup

A man with dark, curly hair and a light beard is smiling while looking at a laptop screen. He is wearing a light-colored button-down shirt over a white t-shirt. The background is a blurred office setting with a wooden wall and a window.

Logging In to the Microsoft 365 Admin Center

Go to

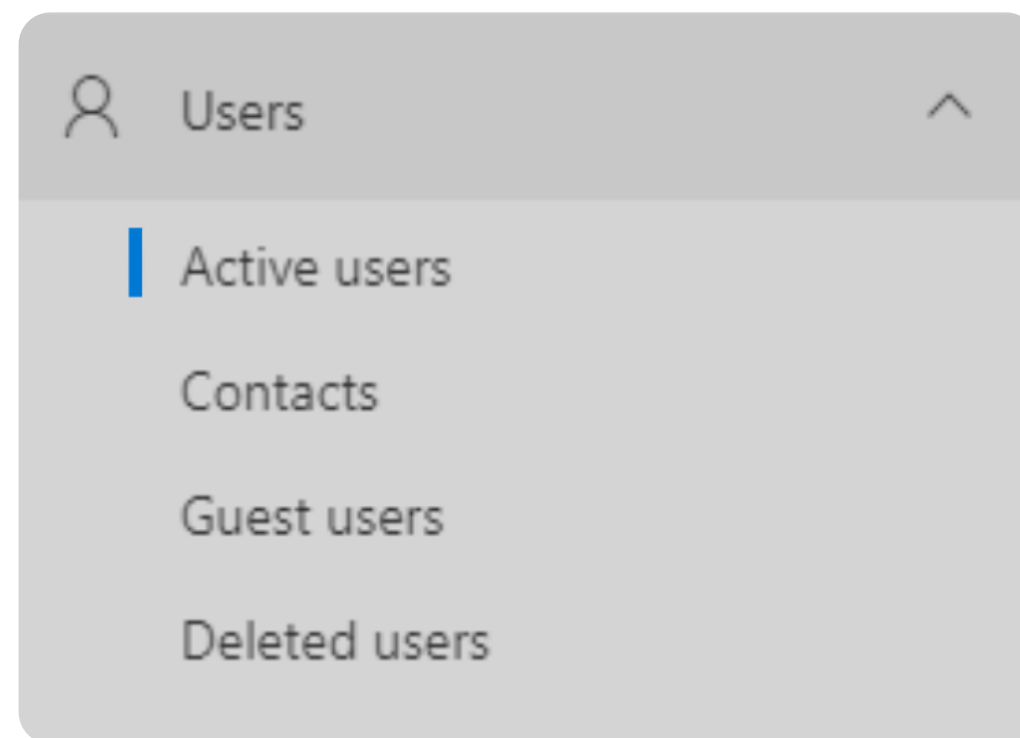
<https://admin.microsoft.com>
and sign in with your
[.onmicrosoft.com](https://login.microsoftonline.com) credentials.



A woman with short dark hair, wearing a dark blue business suit over a white shirt, is seated at a desk. She is looking down at a laptop screen with a slight smile. Her hands are on the keyboard. A white mug is on the desk in front of her. The background features large windows with dark frames, showing a blurred view of greenery outside. The overall lighting is bright and natural.

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.

A screenshot of the 'Add a user' form in the Microsoft Admin Center. The form is titled 'Add a user' and has a sidebar with sections: 'Basics' (selected), 'Product licenses', 'Optional settings', and 'Finish'. The main content area is titled 'Set up the basics' and contains the following fields and options:

- First name: Text input field
- Last name: Text input field
- Display name *: Text input field
- Username *: Text input field
- Domains: Dropdown menu showing 'techsoup.onmicrosoft.com'
- Automatically create a password: ☒
- Require this user to change their password when they first sign in: ☒
- Send password in email upon completion: ☐

At the bottom of the form are 'Next' and 'Cancel' buttons.

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

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

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

- ☒ 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 *

United States

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 ⓘ

☐ Global Administrator ⓘ

☐ Global reader ⓘ

☐ Helpdesk admin ⓘ

☐ Service support admin ⓘ

☐ SharePoint Administrator ⓘ

☐ Teams Administrator ⓘ

☐ User Administrator ⓘ

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

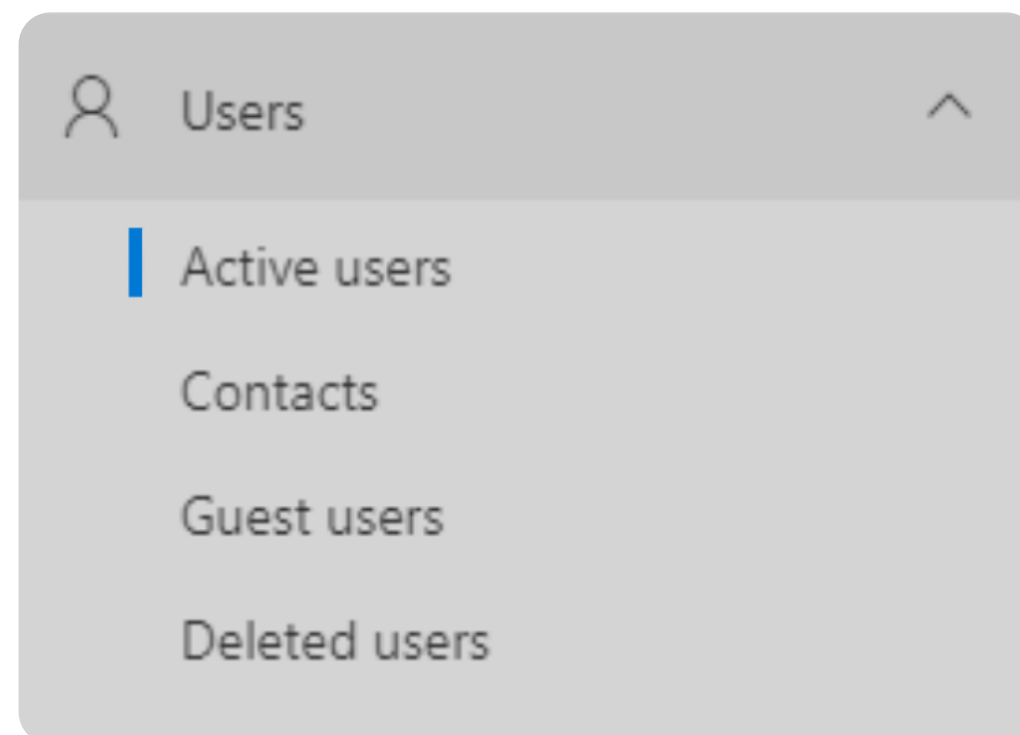
To assign a different role to your user, simply select the most appropriate role.

Note

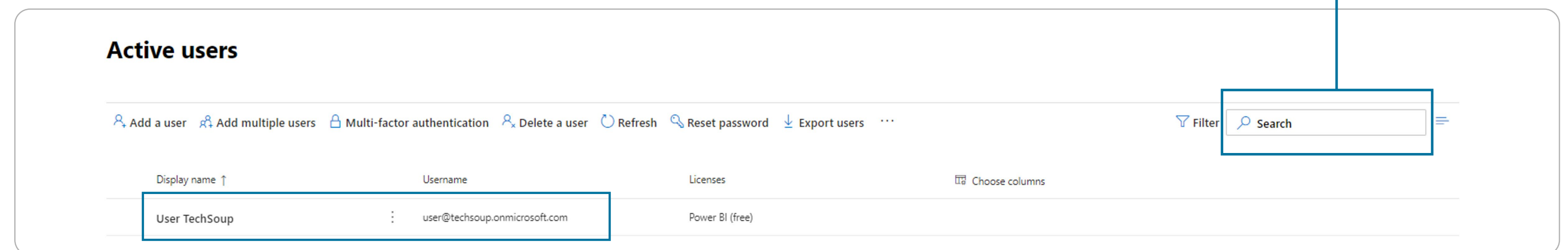
Global Administrators have access to all the controls in Microsoft 365.

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.

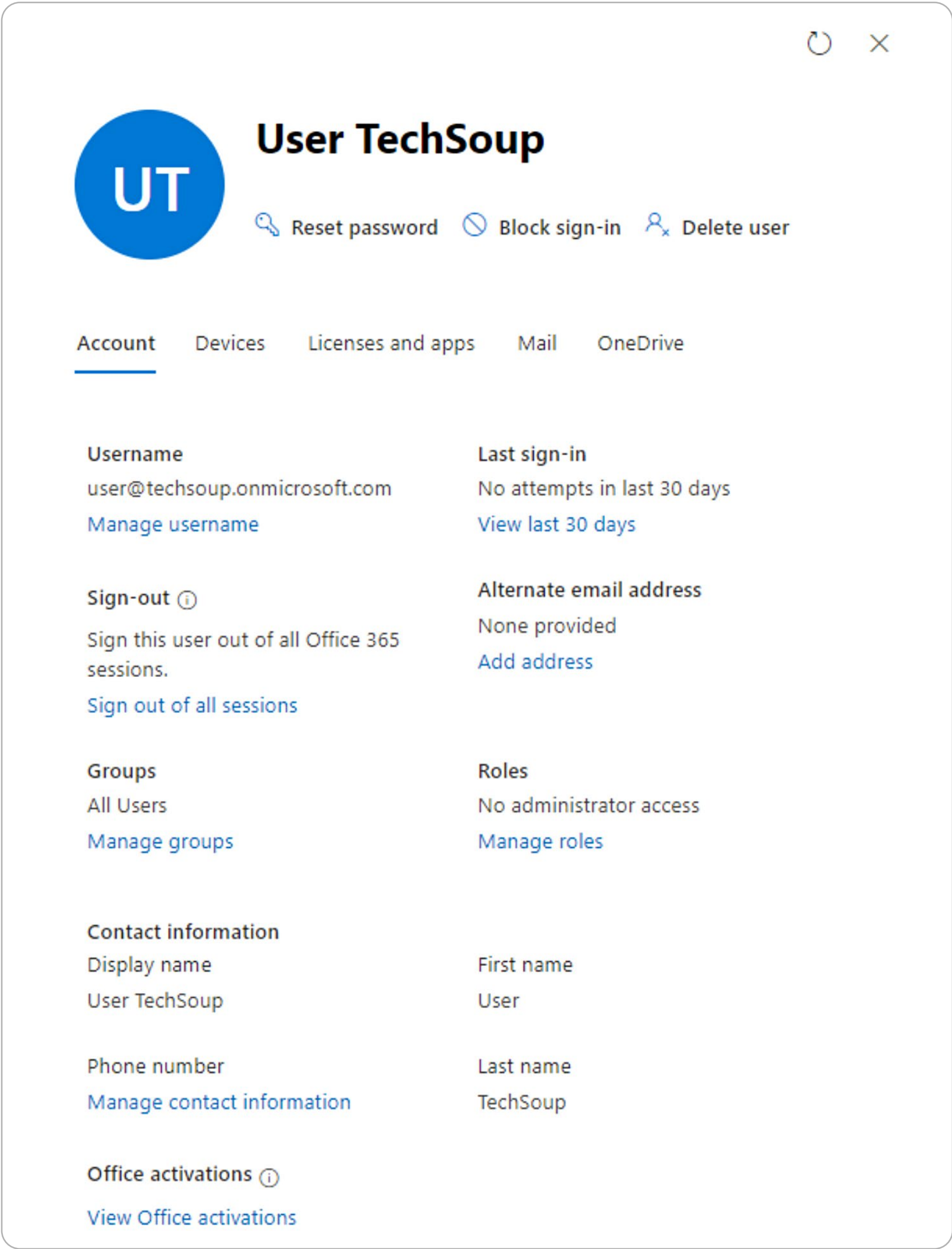


You can

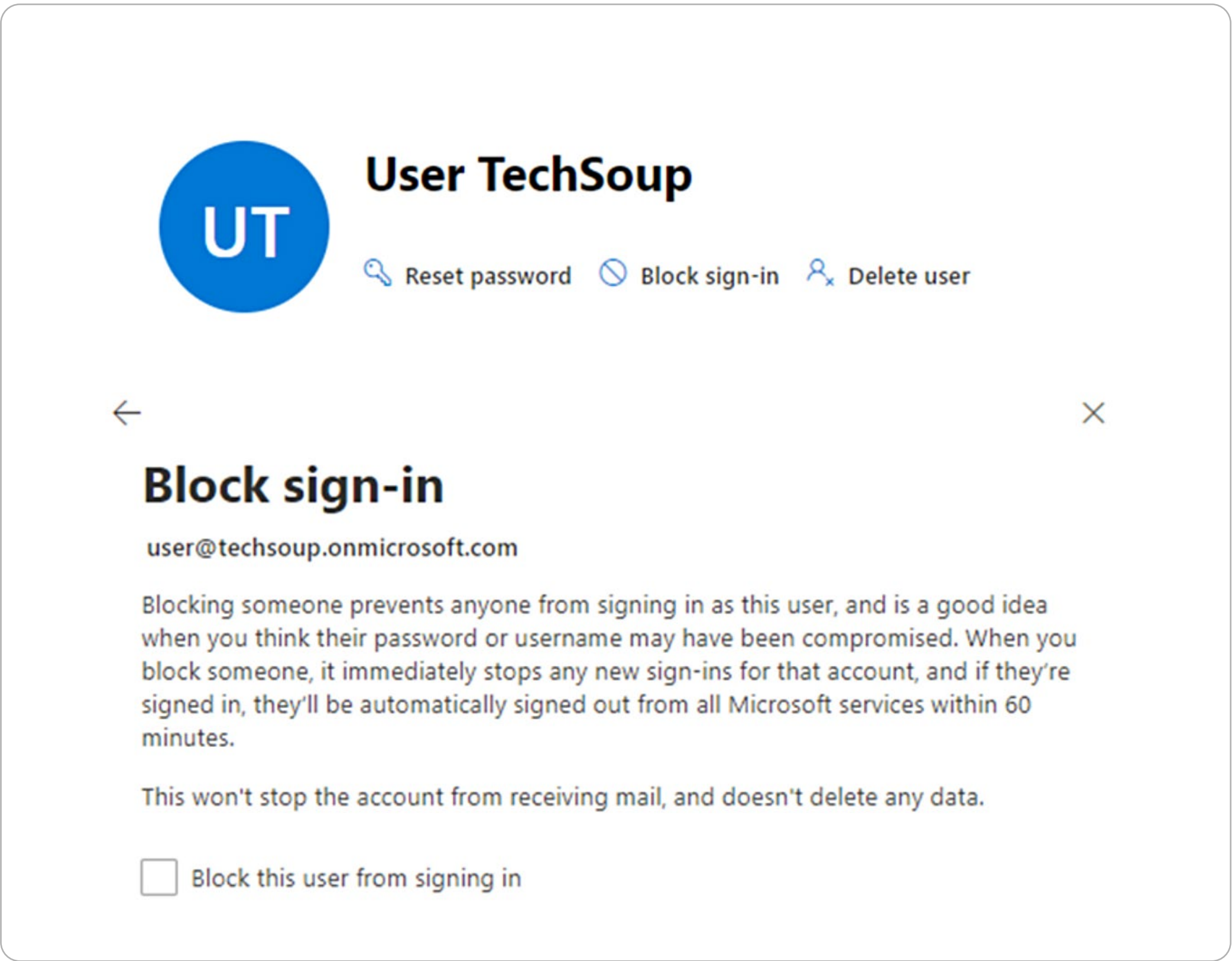
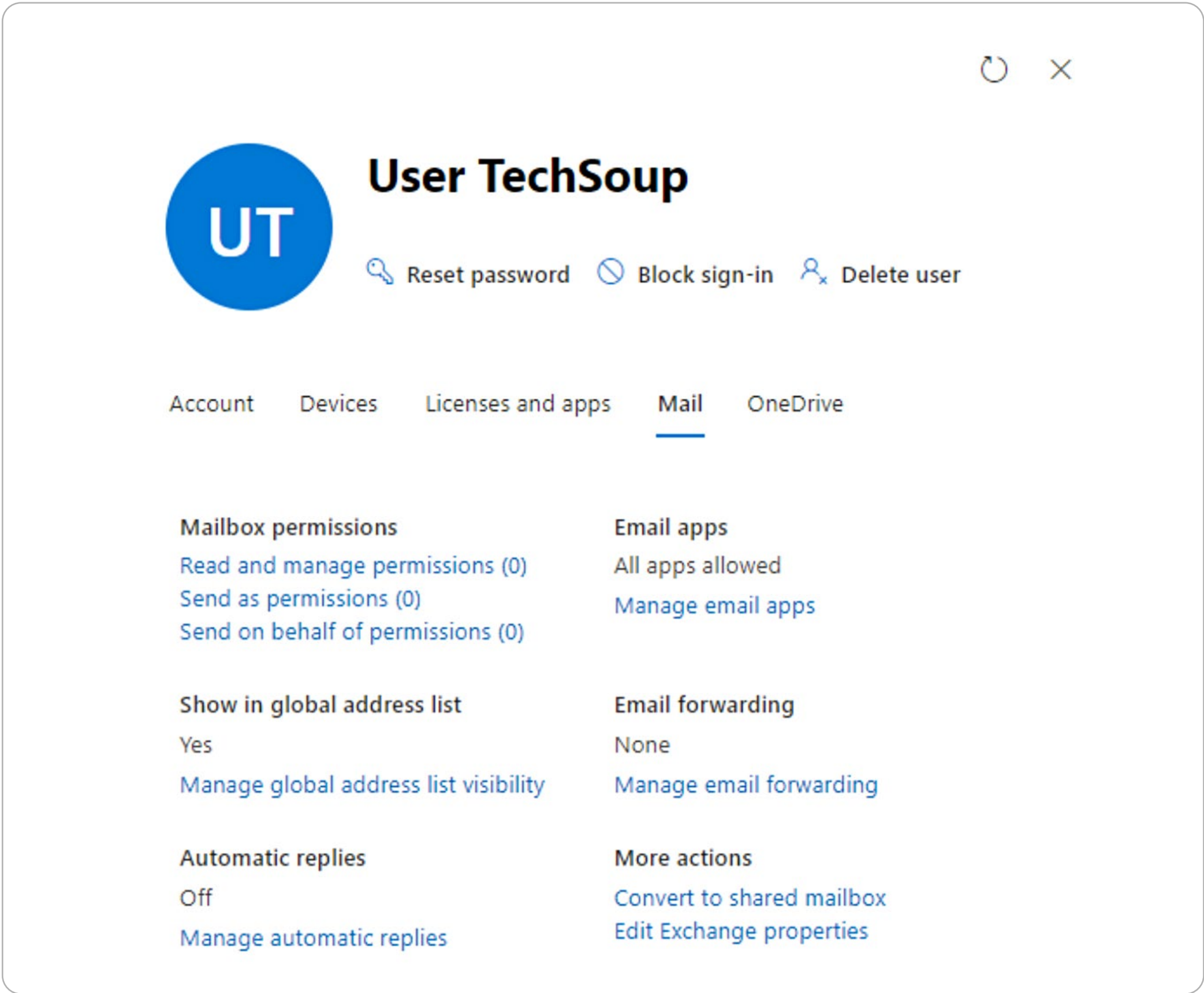
- Manually reset the user's password.
- Block the user from sign-in.
- Delete the user.

- 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.



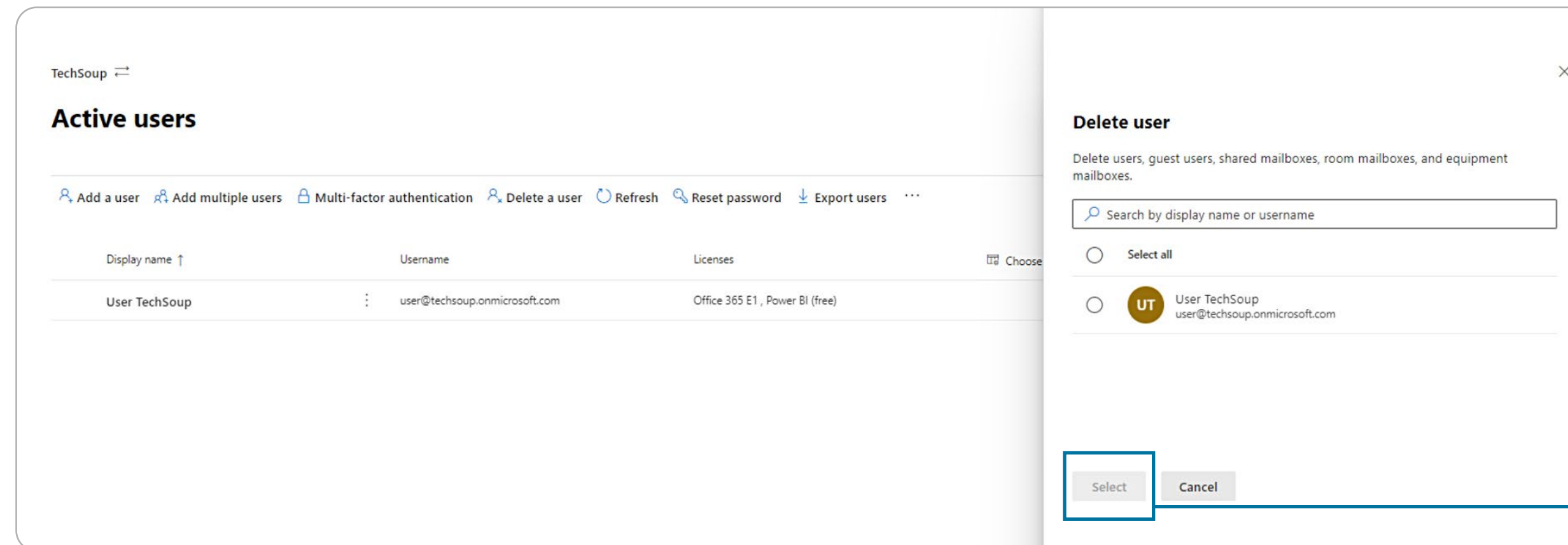
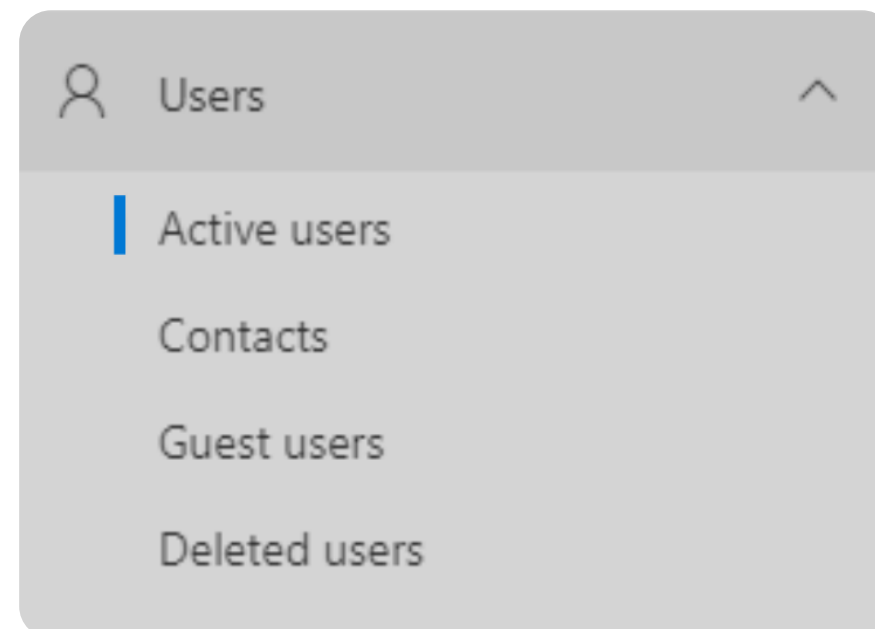
The **Mail** section allows you to forward all emails coming into the user's Outlook to another email address, set up mailbox permissions and automatic replies, etc.



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](https://admin.microsoft.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.

←

×

Delete User TechSoup

You can restore deleted users and their data, except for calendar items and aliases, for up to 30 days after you delete them. Data on their connected devices will be removed, as well as the following:

ⓘ

Power BI (free), Office 365 E1 will be unassigned and available for other users

☐

Email aliases will be removed ⓘ
No email aliases

☐

Mailbox delegate permissions will be removed ⓘ
No mailbox delegate permissions

☐

Give another user access to User TechSoup's OneDrive files for 30 days after the user is deleted
This user does not have OneDrive provisioned

☐

Give another user access to User TechSoup's email ⓘ

Delete user

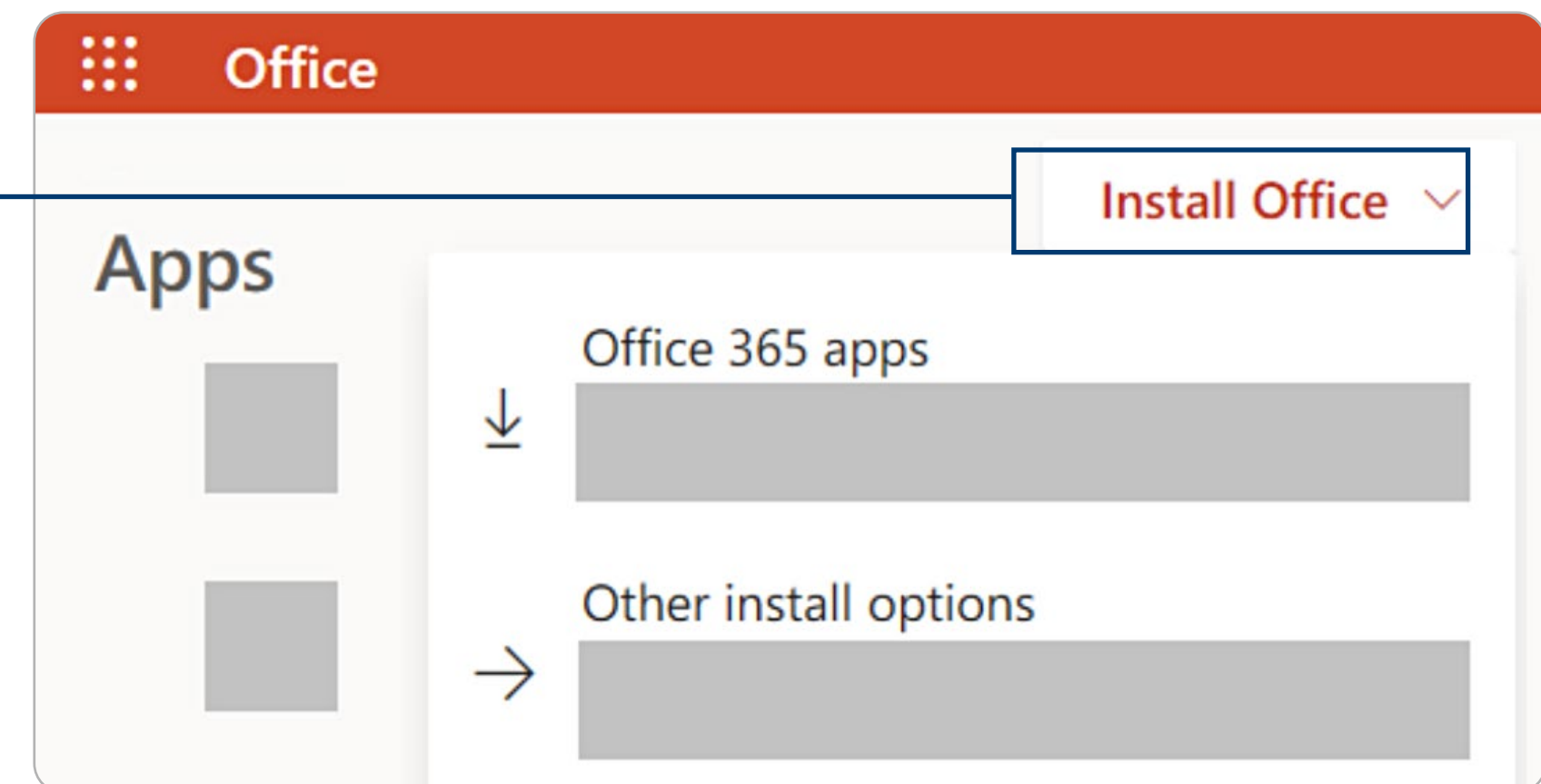
A man with short brown hair and a light beard, wearing a light grey button-down shirt, is sitting at a desk in an office. He is looking at a computer monitor and has his hands on a keyboard. On the desk, there is a white mug, a pen holder with several pens, and a computer mouse. In the background, there are white binders on a shelf and a green plant. A dark blue rounded rectangle with white text is overlaid on the right side of the image.

Installing and Accessing Office Desktop Applications

Installing Office Desktop Applications

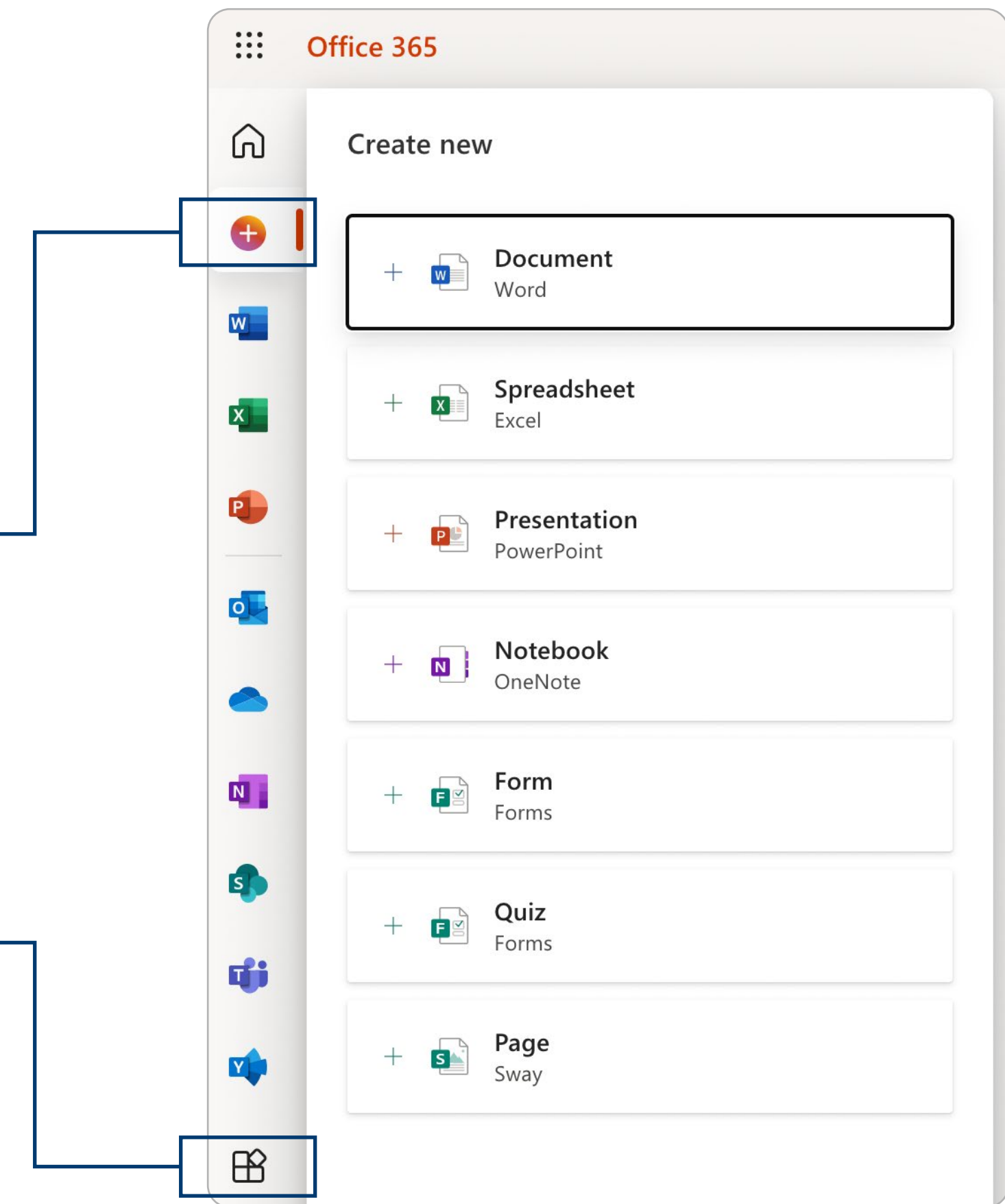
Each user can install Office desktop applications. You do not need to be an administrator to complete the below steps.

- 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.

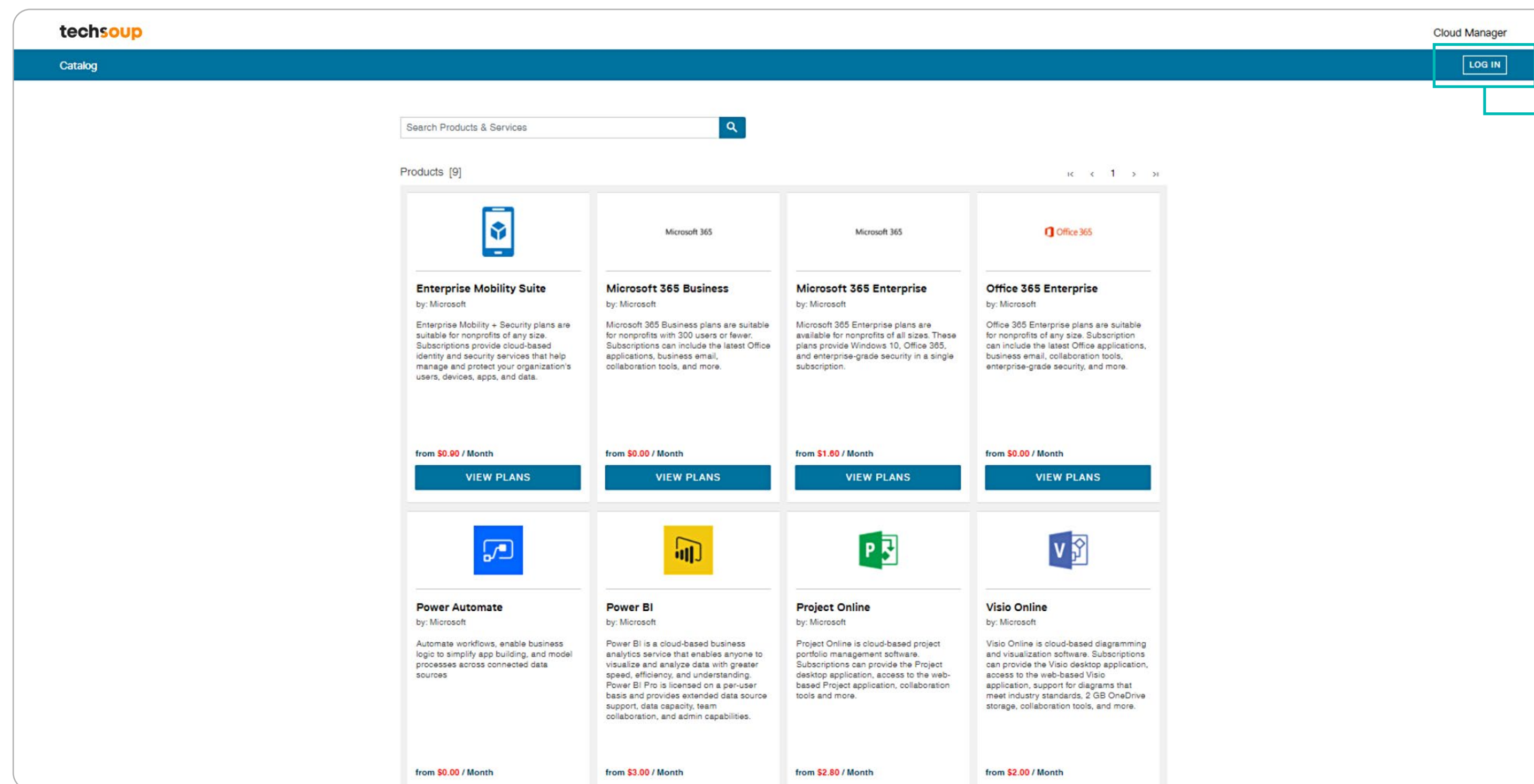


Obtaining Additional Licenses and Services Through TechSoup



- 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.

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Products & Services | Subscriptions | My WorkSpace | Invoices | Support

Subscriptions



Active Subscriptions ▼

<< < 1 > >>

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

Buy Licenses

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

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Cloud Manager | Vanessa

Catalog

Subscriptions

Invoices

Support¹

MY ACCOUNT

LOGOUT

My Account

Set your account settings

MY PROFILE

PAYMENT METHODS

SEE TECHSOUP ACCOUNT

Billing Contact

Your company invoices will be delivered via email to the following person

NAME

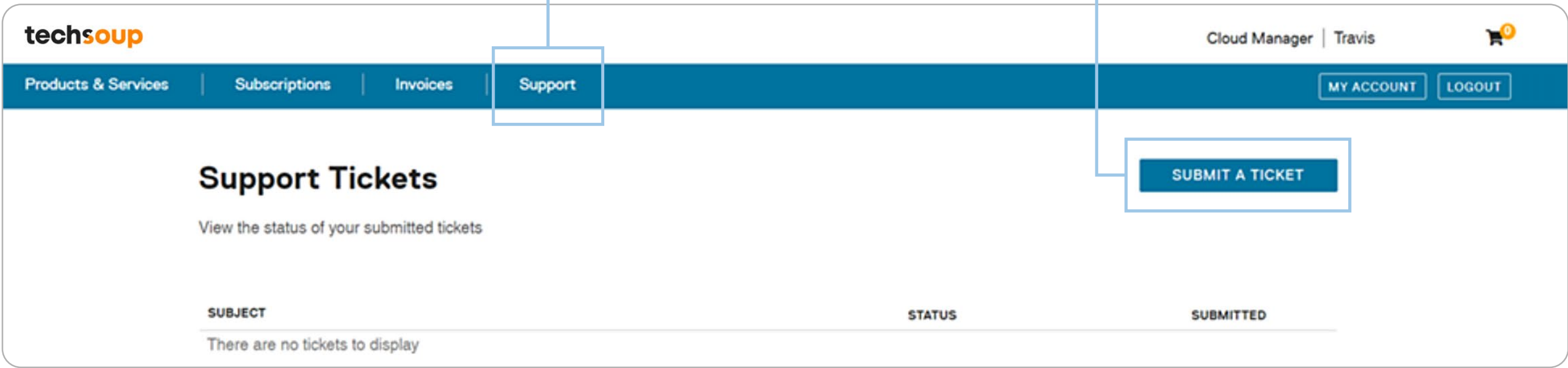
EMAIL

A woman with short dark hair, wearing glasses and a grey sweater, is smiling while looking at a laptop screen. She is sitting at a desk in a bright, modern office environment. In the background, there are other laptops and a glass of orange juice on the desk. The overall atmosphere is professional and positive.

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**.



Submit a Support Ticket

Do you have an issue or need assistance? We are here to help.
Please describe your issue or question.

SUBJECT *

DESCRIPTION *

PHONE NUMBER

EMAIL

Attachments

- 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 button-down shirt, is seated at a wooden desk. He is looking down at a tablet computer he is holding with both hands. On the desk, there is a yellow mug, a white computer mouse, a silver keyboard, a smartphone, a black pen, and a green sticky note. In the background, there are potted plants and a blurred office environment. A bright blue rectangular box is overlaid on the right side of the image, containing white 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](tel: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>

COMMUNITY

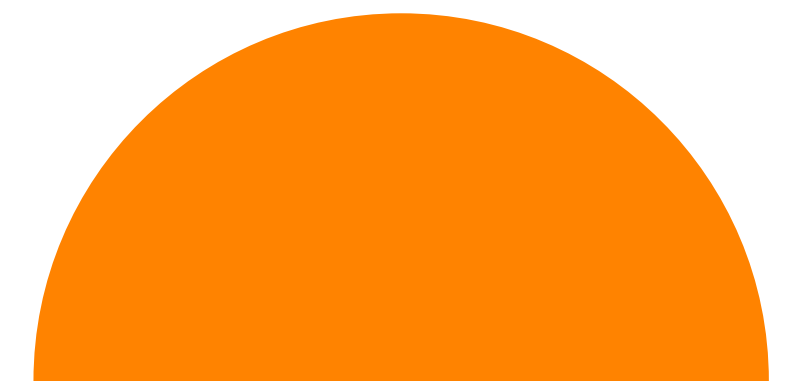
Be a part of our community!

<http://forums.techsoup.org/cs/community/f/112.aspx>

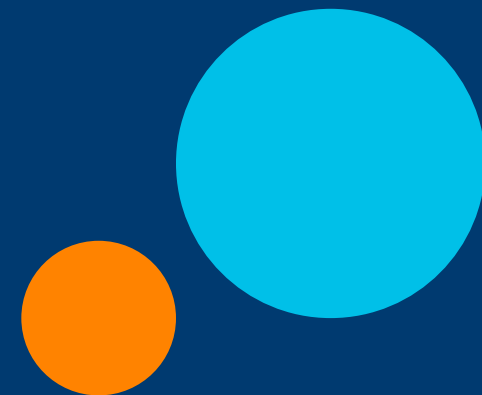


We are here to help!

If you need help, do not hesitate in emailing us at
uscustomerservice@techsoup.org



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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](#).

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