

# Getting Started Guide

## Setting Up Microsoft 365 as an Administrator

October 2022



**techsoup**

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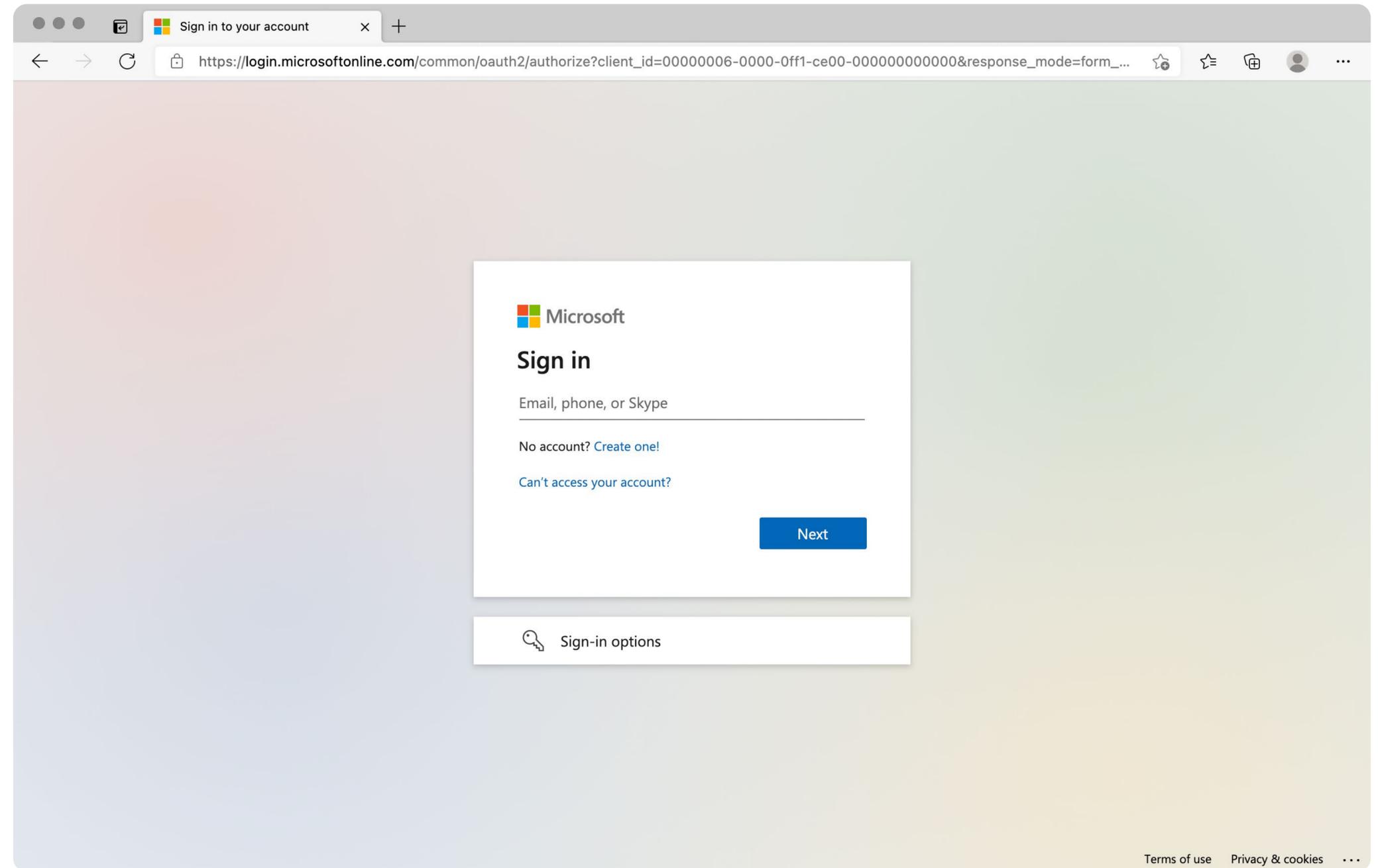
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# Logging In to the Microsoft 365 Admin Center

Go to

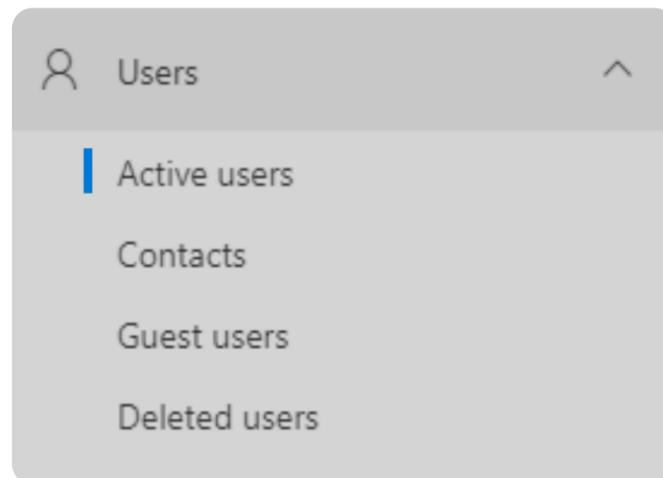
<https://admin.microsoft.com>  
and sign in with your  
[.onmicrosoft.com](https://login.microsoftonline.com) credentials.





**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](https://admin.microsoft.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 progress indicator on the left with four steps: '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]
- Last name: [text input]
- Display name \*: [text input]
- Username \*: [text input]
- 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, there 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.

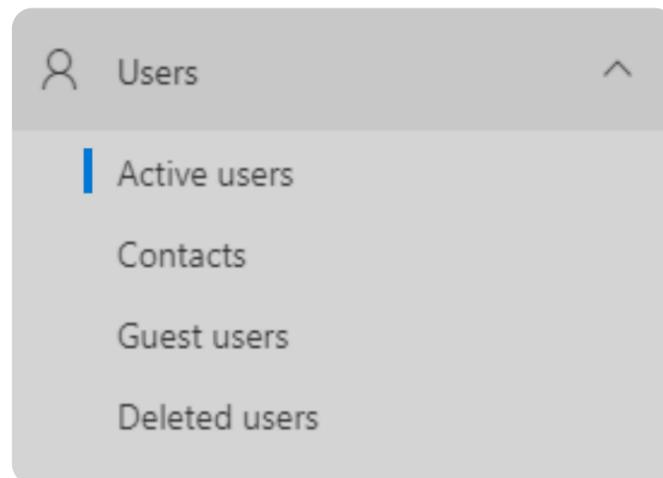
To assign a different role to your user, simply select the most appropriate role.

## Note

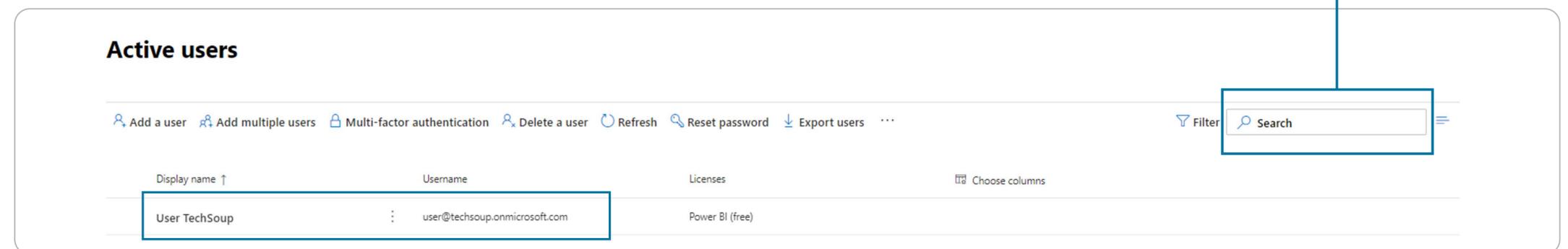
Global Administrators have access to all the controls in Microsoft 365.

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.

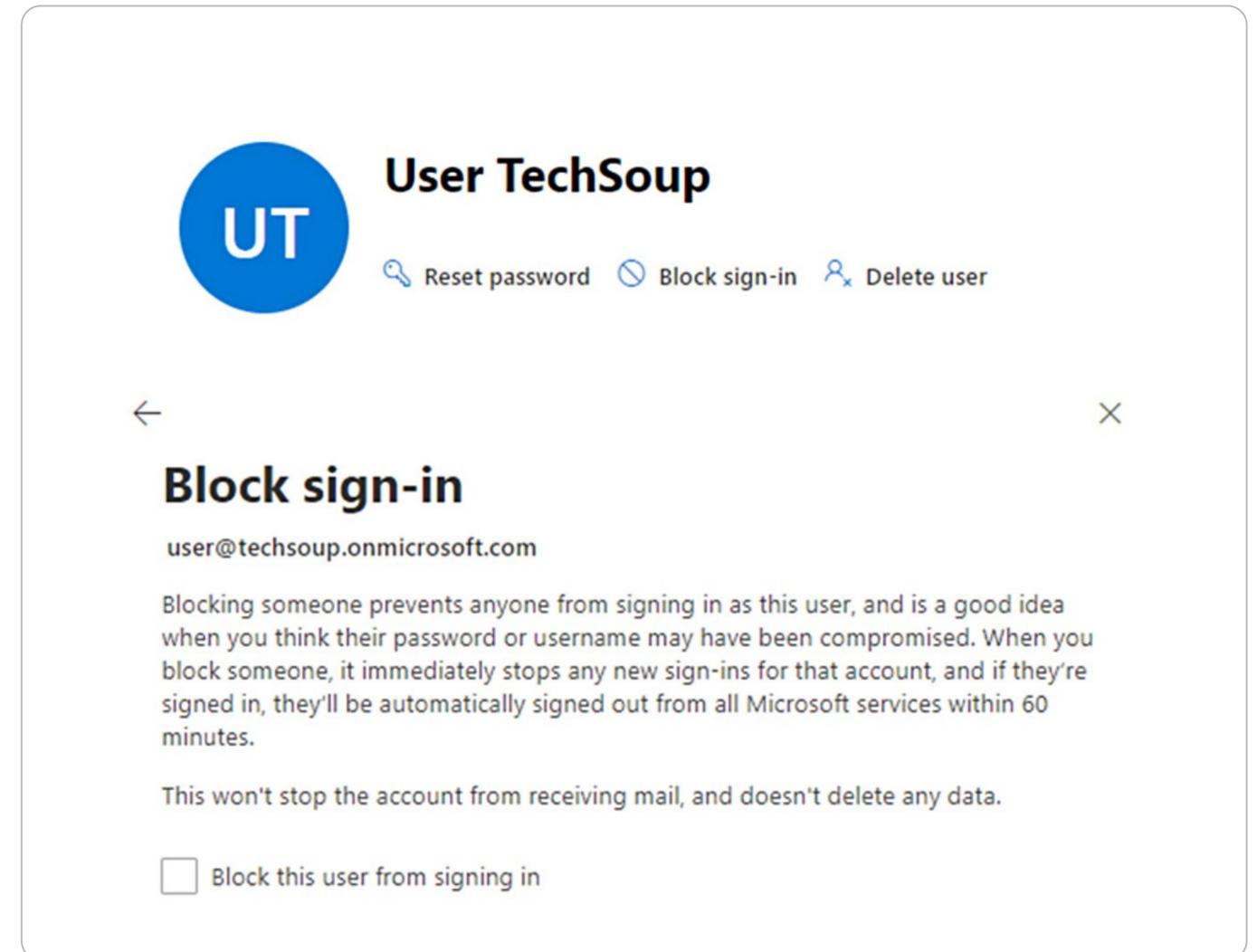
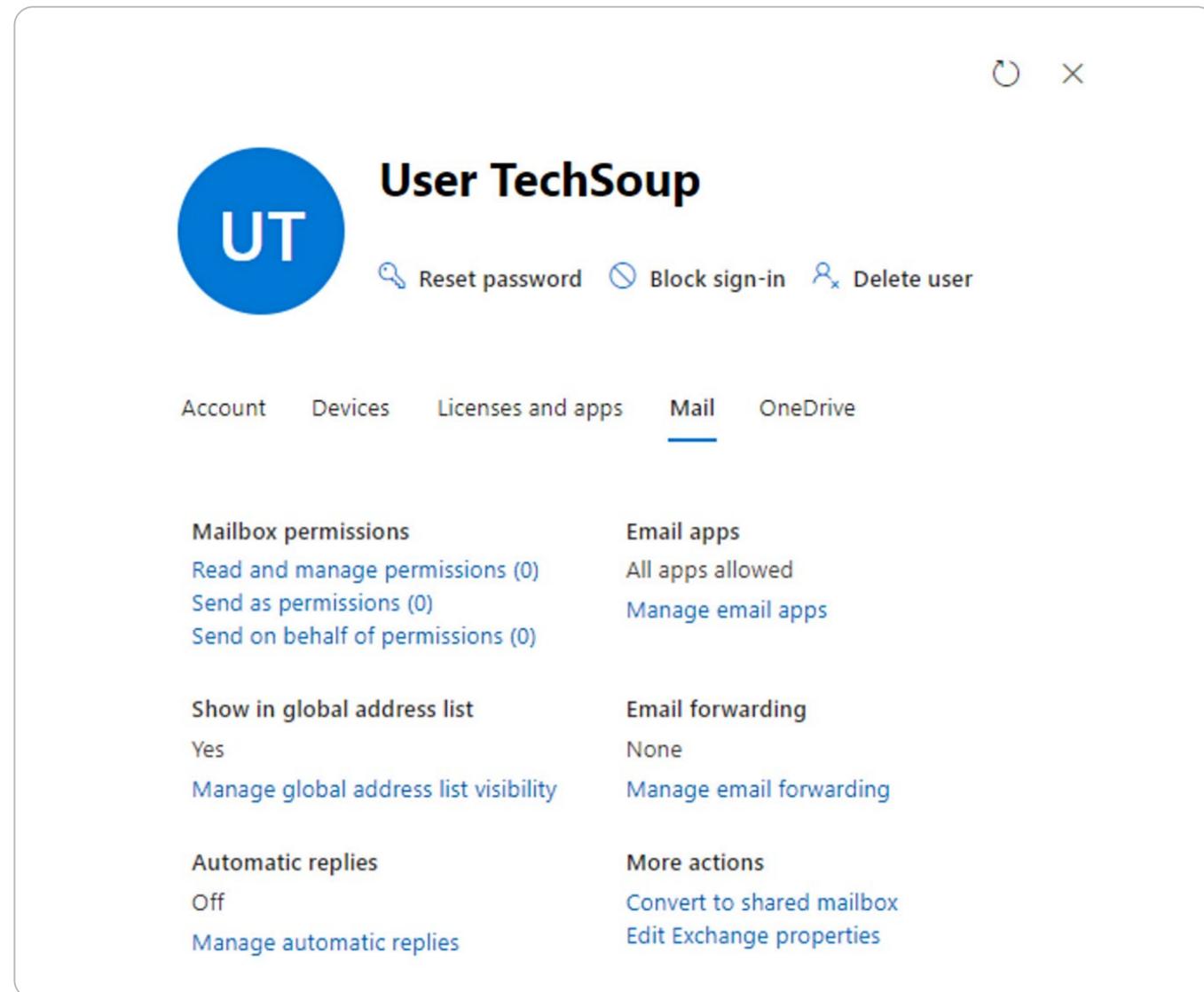
Edit and change many of the user's settings, including:

- 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 screenshot shows the user management interface for a user named 'User TechSoup'. At the top, there is a blue circular profile picture with the initials 'UT' and the name 'User TechSoup'. To the right of the name are three action buttons: 'Reset password', 'Block sign-in', and 'Delete user'. Below this is a navigation bar with tabs for 'Account', 'Devices', 'Licenses and apps', 'Mail', and 'OneDrive'. The 'Account' tab is selected. The main content area is divided into two columns. The left column contains: 'Username' (user@techsoup.onmicrosoft.com) with a 'Manage username' link; 'Sign-out' (with an info icon) with a description 'Sign this user out of all Office 365 sessions.' and a 'Sign out of all sessions' link; 'Groups' (All Users) with a 'Manage groups' link; and 'Contact information' (Display name: User TechSoup) with a 'Manage contact information' link. The right column contains: 'Last sign-in' (No attempts in last 30 days) with a 'View last 30 days' link; 'Alternate email address' (None provided) with an 'Add address' link; 'Roles' (No administrator access) with a 'Manage roles' link; and 'First name' (User) and 'Last name' (TechSoup). At the bottom, there is a section for 'Office activations' with a 'View Office activations' link.

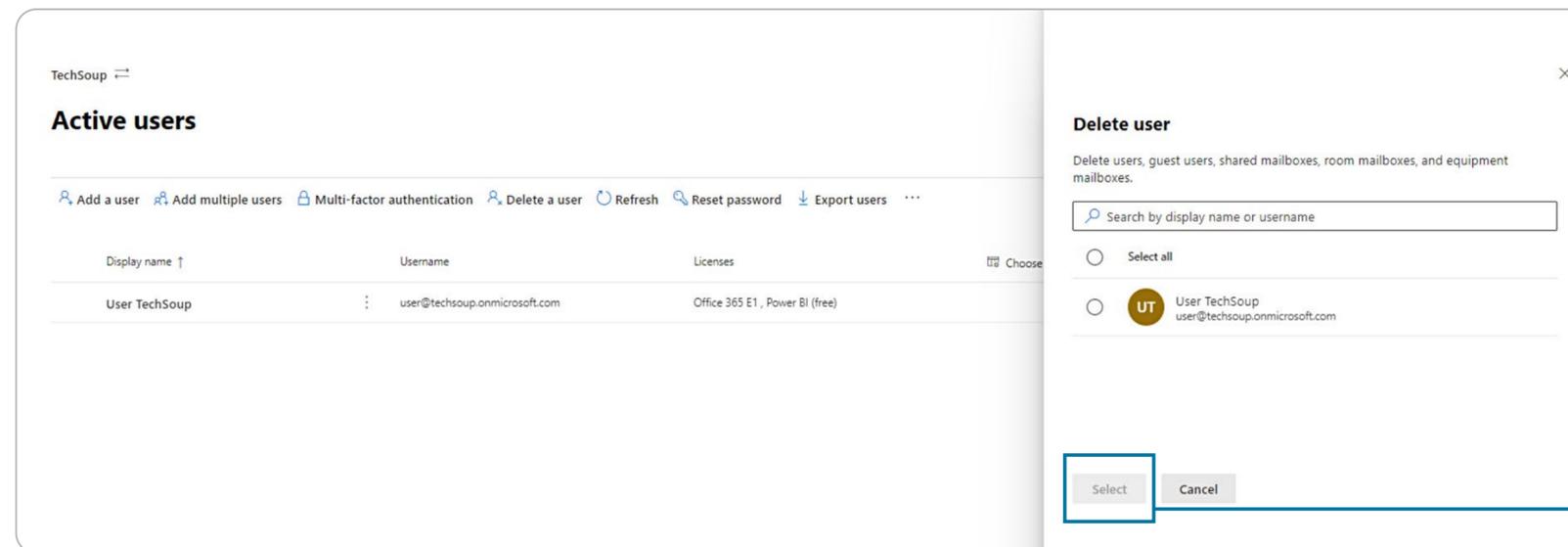
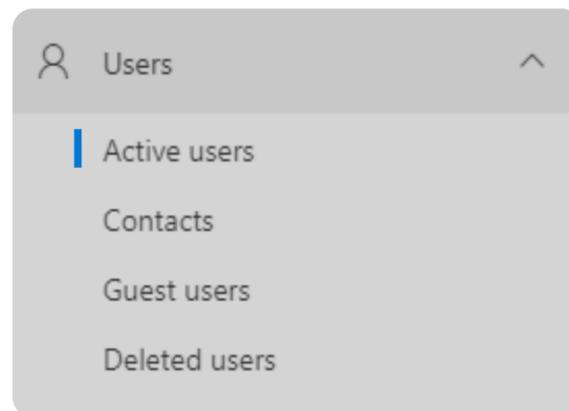
The **Mail** section allows you to forward all emails coming into the user's Outlook to another email address, set up mailbox permissions and automatic replies, etc.



**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

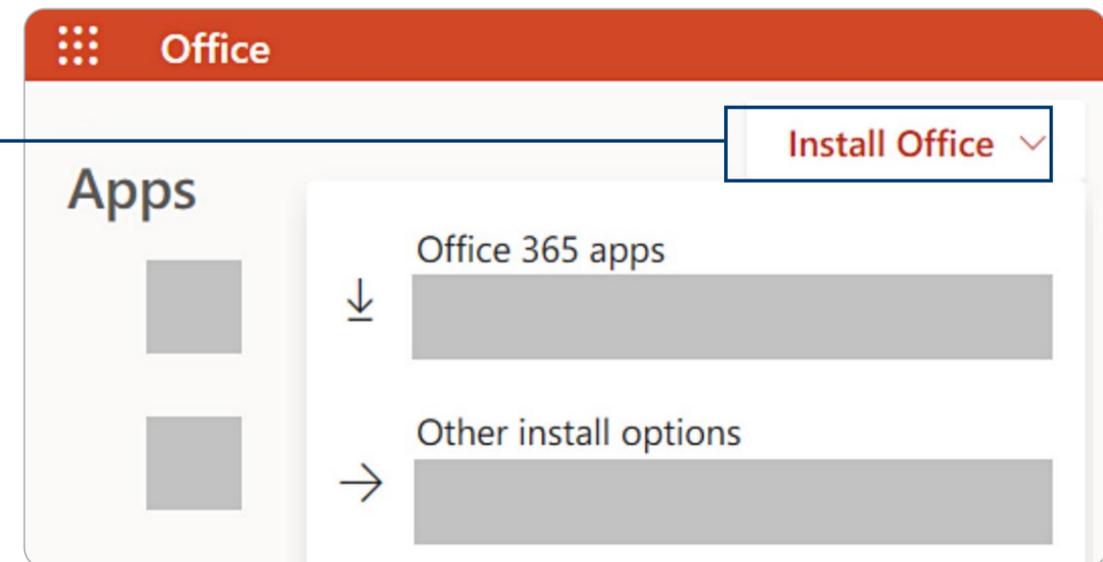


# Installing and Accessing Office Desktop Applications

# Installing Office Desktop Applications

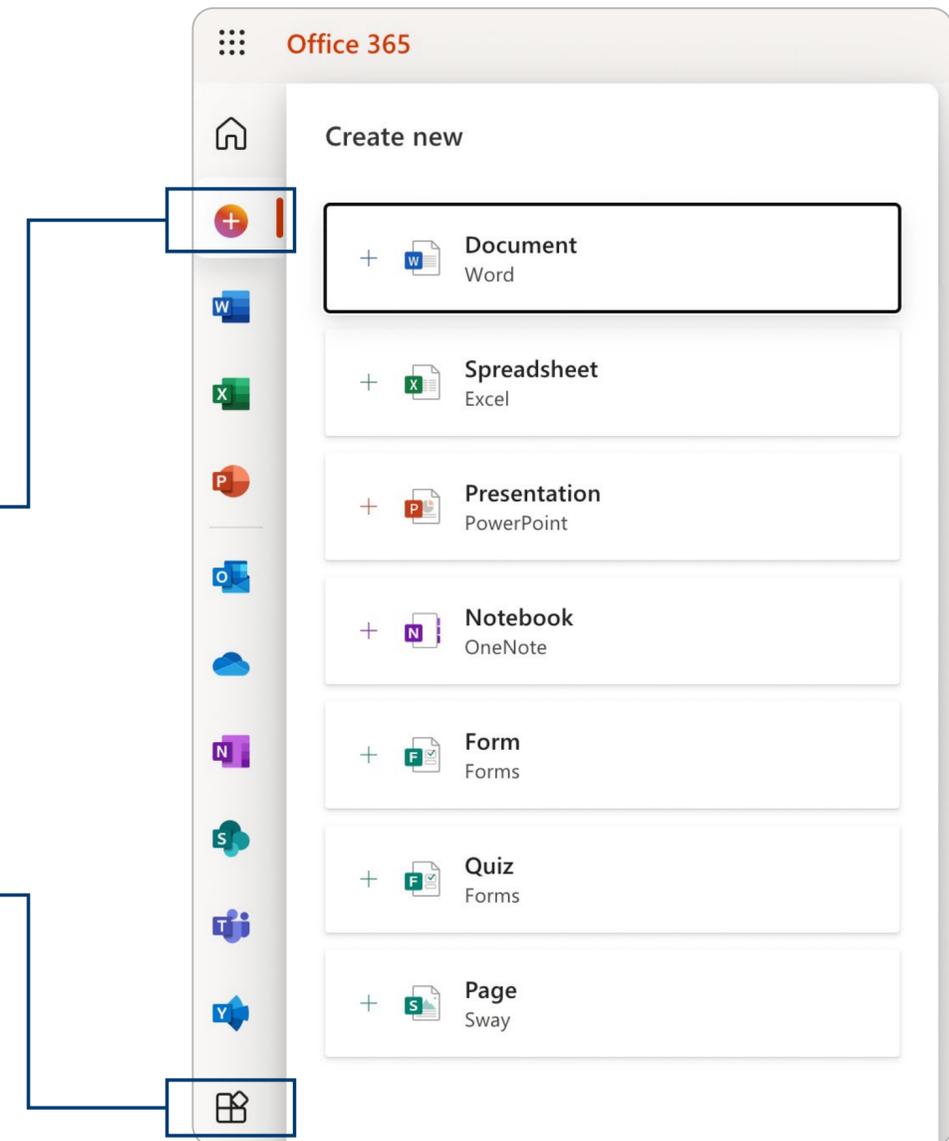
Each user can install Office desktop applications. You do not need to be an administrator to complete the below steps.

- 1 Go to [www.office.com](http://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](http://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](https://cloud.techsoup.org)

The screenshot displays the TechSoup Cloud Manager interface. At the top left is the TechSoup logo and a 'Catalog' link. On the top right, there is a 'Cloud Manager' link and a 'LOG IN' button, which is highlighted with a red box and a red line pointing to the callout 'a'. Below the navigation bar is a search bar labeled 'Search Products & Services'. The main content area shows a grid of product cards under the heading 'Products [9]'. The cards include:

- Enterprise Mobility Suite** (by: Microsoft) - from \$0.00 / Month
- Microsoft 365 Business** (by: Microsoft) - from \$0.00 / Month
- Microsoft 365 Enterprise** (by: Microsoft) - from \$1.00 / Month
- Office 365 Enterprise** (by: Microsoft) - from \$0.00 / Month
- Power Automate** (by: Microsoft) - from \$0.00 / Month
- Power BI** (by: Microsoft) - from \$3.00 / Month
- Project Online** (by: Microsoft) - from \$2.80 / Month
- Visio Online** (by: Microsoft) - from \$2.00 / Month

- 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](https://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 interface. At the top, there is a navigation bar with the following items: Products & Services, Subscriptions (highlighted with a red box), My WorkSpace, Invoices, and Support. Below the navigation bar is the main content area titled "Subscriptions". On the left, there is a filter dropdown menu set to "Active Subscriptions". The main content is a table with the following columns: SUBSCRIPTION, NEXT INVOICE, QUANTITY, UNIT PRICE, DISCOUNT, and SUBSCRIPTION AMOUNT. The table contains three rows of subscription data. The second row is highlighted, and an ellipsis menu is open next to it, showing the following options: Buy Licenses, Buy add-ons, Downgrade the subscription, and Cancel the subscription.

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		

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:

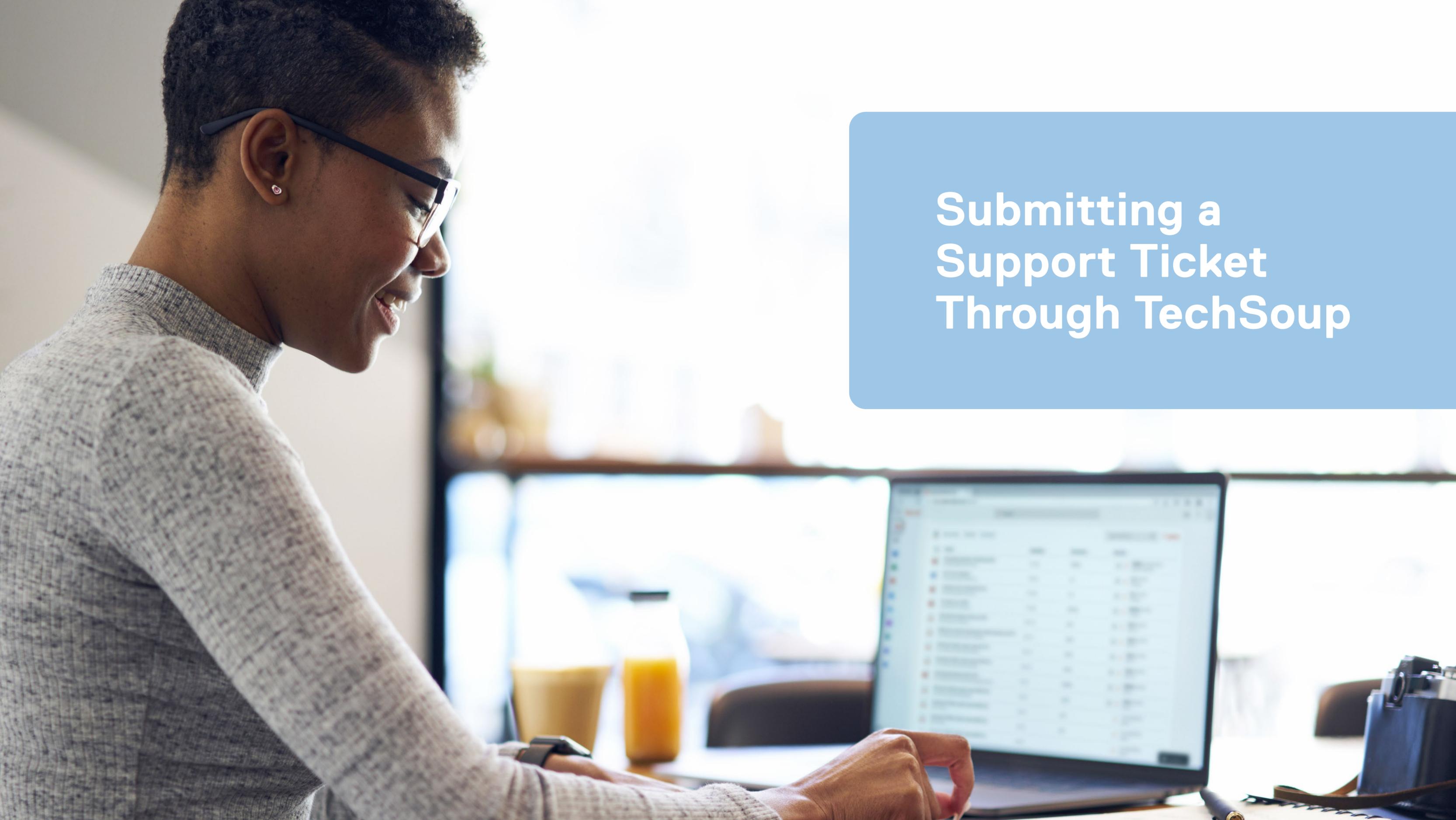
Access order history and invoices

Add or update payment methods

Cancel subscriptions

Submit a support ticket

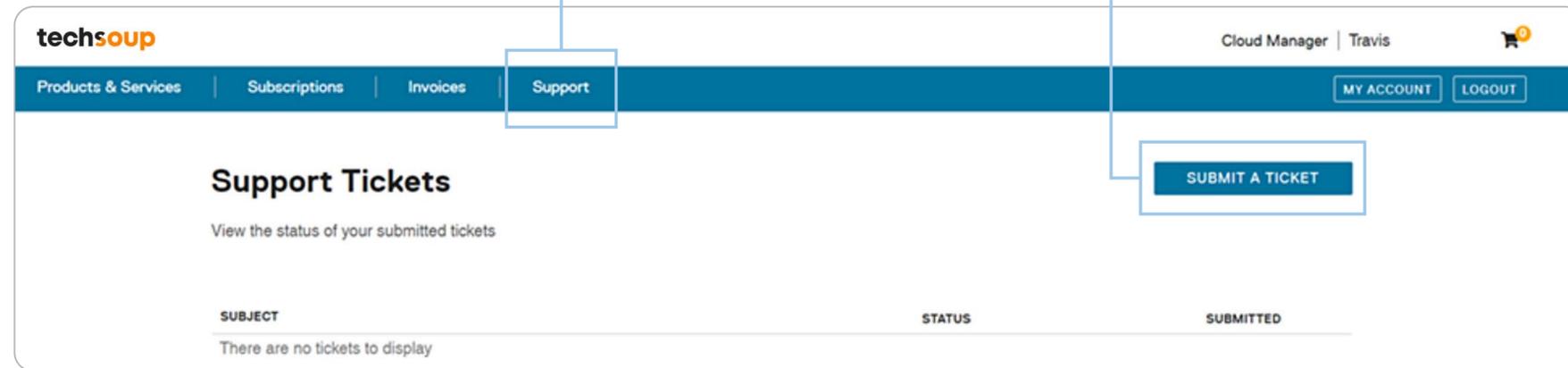
The screenshot shows the TechSoup Cloud Manager interface. At the top left is the TechSoup logo. On the right, it says 'Cloud Manager | Vanessa' with a shopping cart icon. Below this is a navigation bar with links for 'Catalog', 'Subscriptions', 'Invoices', and 'Support' (with a notification badge). On the right side of the navigation bar are buttons for 'MY ACCOUNT' and 'LOGOUT'. The main content area is titled 'My Account' with the subtitle 'Set your account settings'. Below this are two tabs: 'MY PROFILE' (which is active and underlined) and 'PAYMENT METHODS'. A blue button labeled 'SEE TECHSOUP ACCOUNT' is positioned below the tabs. Under the 'MY PROFILE' tab, there is a section titled 'Billing Contact' with the text 'Your company invoices will be delivered via email to the following person'. Below this text is a table with two columns: 'NAME' and 'EMAIL', with a horizontal line underneath.



# 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**.



The screenshot shows the 'Submit a Support Ticket' form. The form title is 'Submit a Support Ticket'. Below the title, there is a message: 'Do you have an issue or need assistance? We are here to help. Please describe your issue or question.' The form contains several input fields: 'SUBJECT \*', 'DESCRIPTION \*', 'PHONE NUMBER' (with the value '4155555555'), and 'EMAIL'. At the bottom, there is an 'Attachments' section with a file upload icon.

- 3 Fill out all the details in the intake form.
- 4 We will contact you very soon to fix your problem.



**Additional  
Resources  
Available Through  
TechSoup**

# How Can TechSoup Help You?

## SERVICES

We have [services](#) that range from license activation, migration, security assessment, to setting up multi-factor authentication 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.

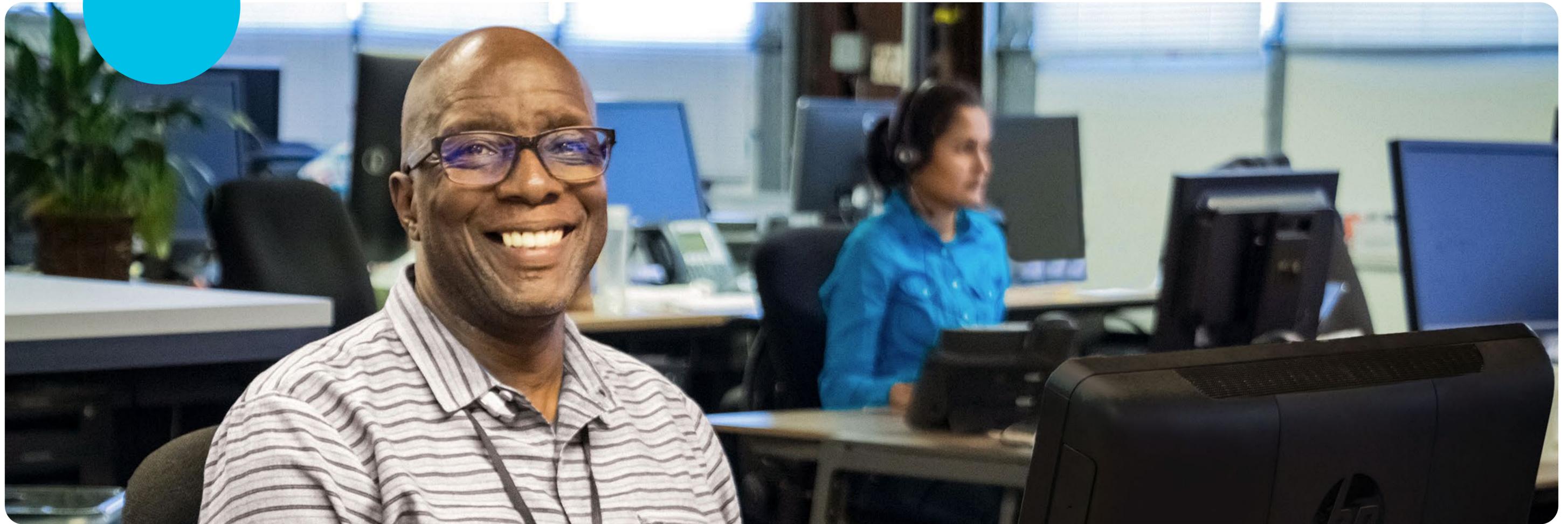
**Start learning:**

<https://techsoup.course.tc/catalog?type=microsoft-digital-skills-center>

## COMMUNITY

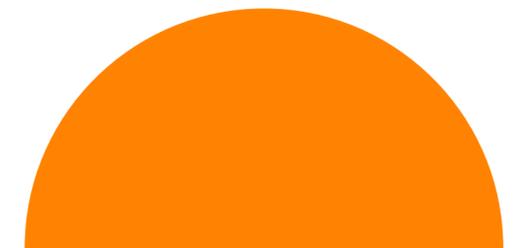
**Be a part of our community!**

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

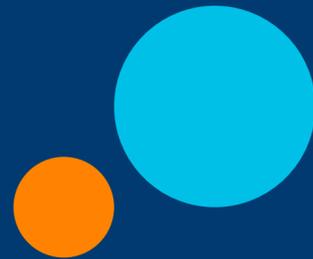


## **We are here to help!**

If you need help, do not hesitate in emailing us at  
[uscustomerservice@techsoup.org](mailto:uscustomerservice@techsoup.org)



**techsoup**



## **Main Office**

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

## **Press Contact**

Email PR at  
[PR@techsoup.org](mailto: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](mailto:mmd@techsoup.org).

## **Business Development**

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

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