

PART ONE

THE GUIDE TO OFFICE 365 TRAINING:

Setting Up Your Domain

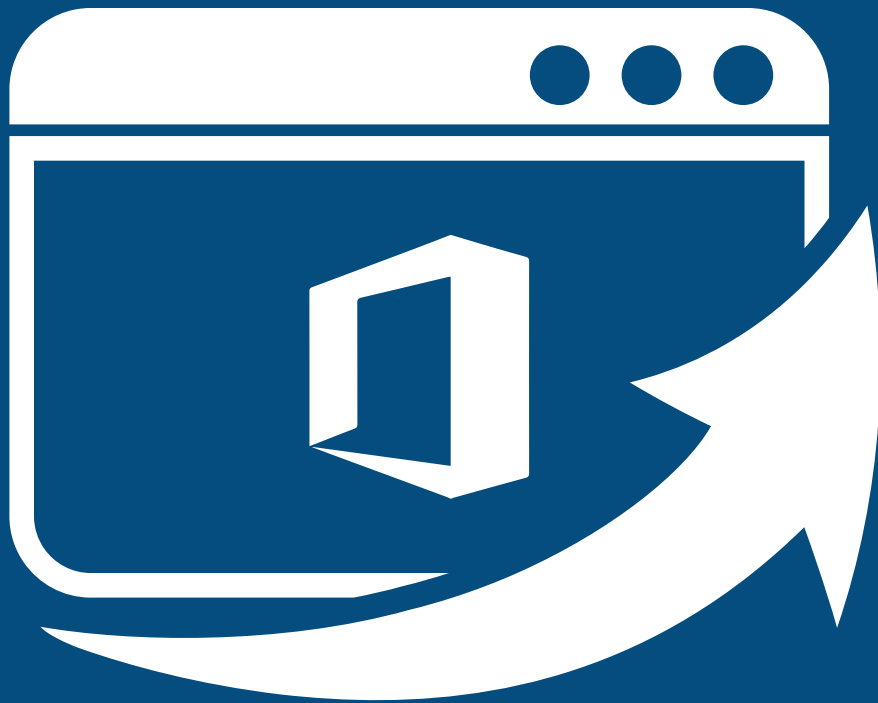


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Introduction

If you're new to Office 365, then this eBook is the right resource for you! Getting started with Office 365 is fairly straightforward, but harnessing all of the capabilities of the platform – and helping your team to master those capabilities and improve their productivity – will take time and effort. And for organizations with concerns about security and governance, it is important to walk through and understand all of the administrative options to ensure that your content is secure, and all necessary policies and procedures are in place to manage your environment moving forward. That's where this guide can help get you started.

Connecting your Domain Name

We're going to walk you through a very basic process of setting up your Office 365 account, from sign up to basic user configuration, allowing you to quickly add the members of your team to your custom domain and help them get up and running. For example, you may already have a website at TopSpinToys.com, and want to associate your Office 365 account to this domain. Office 365 assumes that you have already secured your custom domain, and from there will provide you with a wizard-driven domain setup process so that your end user emails match your custom domain from the start. If you do not yet have a custom domain, that's ok. Office 365 will provide you a sub-domain (such as topspiontoys.onmicrosoft.com) until you're ready to make the change.

Business Value of Office 365

Organizations are always looking for opportunities to increase productivity and collaboration, while at the same time driving down operational costs and inefficiencies. On top of that, they need to keep everything secure and compliant. Office 365 provides all of these things through a rich set of productivity solutions. The platform provides the market-leading Office suite of tools, combined with email and instant messaging capabilities to improve communication, online meetings and web conferencing capabilities, and online and offline document and team collaboration solutions.

No other vendor provides such a rich and comprehensive set of solutions for enterprise business productivity, and no other platform provides the same business value as Office 365. Find out more about how customers find value in Office 365 through this [Microsoft whitepaper](#).

Administration 101



Office 365 Tutorial Link: [Office 365 Fundamentals](#)

Let's begin the process by walking through the administrative setup process, beginning with the establishment of your new Office 365 service. Whether you're new to Office 365 and its associated technology, or a seasoned IT Pro or Developer, this guide will walk you through the necessary steps to establish your Office 365 account, add your end users, and jumpstart collaboration.

What to Expect During The Setup Process

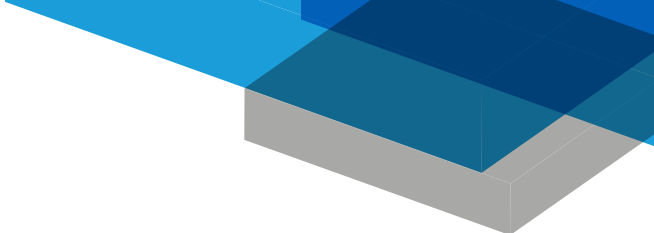
Office 365 Tutorial Link: [Set up Office 365 for business – Admin Help](#)

If your company is brand new to the Office 365 platform, the process begins with the purchase of Office 365 licenses for all of your employees. There are [different plans available](#), with options that include the full Microsoft Office downloadable suite of tools, and those that only provide the online, or web-based versions of the Office suite. There are plans available for an individual, small business, and for the enterprise. Each license type (by company type) includes options for online and offline (downloadable) apps, email, and productivity solutions.

One of the most common questions asked is “Can I upgrade my Office 365 license later?” For example, if your company has fewer than 250 employees, you might select Office 365 Business Premium. But after 6 months and a merger, you might suddenly find yourself needing more licenses and all of the enterprise features, at which point you can move to one of the Enterprise plans. Microsoft provides ample help on [how to make this move](#).

Purchasing a New Office 365 Plan

Once your plan is selected, you as the Administrator will walk through the purchasing process, allowing you to associate your new plan with any existing subscriptions (in case you are expanding the number of licensed users), as well as associate your account to your personal Microsoft ID (for authentication purposes). If you've ever attended a Microsoft event or webinar, or purchased software from the Microsoft store, you probably already have a personal Microsoft ID. You can connect this to your new Office 365 account, or create a new Microsoft ID.



The signup process has four simple steps:

- Provide your contact details
- Create a new ID (or associate your account with an existing ID)
- Review your order
- Place your order

Once purchased, you will receive a welcome letter as the new Office 365 Administrator with details on signing onto the platform and getting started. If the license was purchased on *your behalf*, your profile will be added to the company account, and you will likewise receive a welcome email with your User ID and a temporary password. Once you have that, you're ready to get started!

Signing on to Office 365

Office 365 Tutorial Link: [How to sign in to Office 365 for business](#)

To begin, sign in at <http://portal.office.com> and go to the Setup Wizard, which will guide you through basic or advanced setup scenarios, as needed. The wizard will walk you through the process of creating new users and mailboxes, setting up directory synchronization, and migrating email from existing platforms.

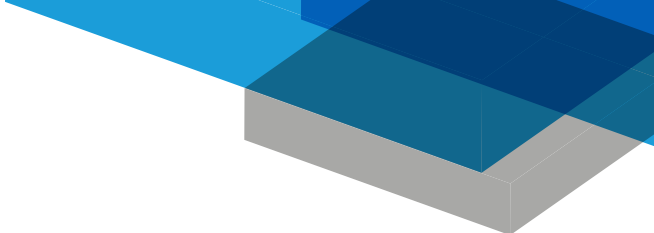
Of course, if you are interested in more advanced features, such as providing a more seamless experience across the various Office 365 services, the wizard will also point you toward online resources to help you deploy federation services for single sign-on across the various Office 365 services (such as SharePoint).

Verifying Your Domain

Office 365 Tutorial Link: [Add Your Custom Domain](#)

Most organizations want to tie their Office 365 account directly to their company domain, primarily so for consistency with your email. Using the company example above, your email might be `susan@topspintoys.com`. If you do not have a custom domain name (maybe you're using Hotmail or Gmail right now), Office 365 will provide a customized sub-domain (for example, `topspintoys.onmicrosoft.com`) which you can always change later. However, for the best end user experience, it is best to start with your custom domain and not go through the headaches of change (or lost email) later down the road.

Within the Office 365 Admin Center, go to the Domains section of the dashboard and select 'Add domain' to launch the setup wizard. Type your domain name into the wizard, along with the



customized [DNS record](#), allowing Office 365 to verify ownership of the domain. Based on the DNS host (such as GoDaddy), the wizard should provide step-by-step instructions for adding the record at the host site. Once you've added the record at your DNS host, you can come back to Office 365 and finish the process by selecting 'Okay, I've added the record'.

It will take your hosting provider anywhere from one to five hours to see the changes and make the necessary changes to switch your email over to Office 365, with some updates taking as long as 72 hours to complete. Of course, if you need to interrupt the process at any time, your progress will be saved until the next time you log into the admin center. Once this process is completed, all of your end users should be setup with the Office 365 email addresses.

Pointing your Office 365 Email to your Domain

With your custom domain added and verified within Office 365, the domain wizard will show the existing users in the system (including yourself) with current and updated email addresses. This conversion process is automatic. The wizard also allows you to add or update additional users. Once your email has been changed, the system will require you to log out, and then log back in with your updated email as your account ID.

Completing Setup

When your domain has been established, and your email has been converted to the new domain, the last step is to click through and complete the setup process. If you do not have a website already associated with your new domain, Office 365 can transfer the necessary DNS records and manage them on your behalf, or you can continue to management them yourself if you already maintain a website. You are also prompted to select the services you wish to use with your new domain, such as Outlook, and will be provided with instructions on any remaining steps with your registrar to finalize the process.

Basic User Management



Your new Office 365 site is now up and running! The next step is to add your end users and help them setup and configure their email accounts, as well as other key collaboration services. As with the other key administrative procedures, adding users is fairly straightforward the steps are streamlined.

For all administration tasks, we'll start at the Office 365 admin center. Once logged onto Office 365, go to the app launcher at the top left of your screen (lovingly referred to as "the waffle"), and select the grey Admin icon. This option is only available to authorized and verified administrators, and takes you directly to the admin center where your tools and reports are security trimmed based on your administrative role in Office 365. In short, you will only have access to those things which you are authorized to see and manage.

Adding Users

Office 365 Tutorial: [Add users individually or in bulk to Office 365](#)

Within the Office 365 admin center, you have the ability to add one user at a time, or add them in bulk. To add one user at a time, go into Users, Active Users and select the + icon at the top of the screen, which opens the add user wizard. The wizard allows you to create their names and assign a password, assign your custom domain, and also informs you as to whether there are sufficient accounts remaining on your Office 365 license plan to add this new user. Once completed, click Create and close the wizard.

When adding a group of users, you can use a plain text .CSV to build your list of names. From the Active Users screen, select the bulk upload icon, which is found next to the + icon. The form provides samples and a blank .CSV file which you can modify, save, and then upload into the bulk uploader. Once uploaded, you can view the user entries and modify the names or profiles before proceeding. The wizard then walks through the remaining options, allowing you to assign licenses to various other services, as needed.



Resetting a Password

Office 365 Tutorial: [How to reset a password](#)

As you add new users to the Office 365 platform, the system will generate welcome invitations and send through email on your behalf, including their account IDs and temporary passwords. On their first visit to the site, your end users will also be prompted to change their password. After changing their password, they will need to sign in again.

After your users have been added and begin to be active within the Office 365 platform, you'll occasionally need to reset a password – which is one of the most common admin tasks in the book. Simply go into the Office 365 admin center under Users, Active Users and select the individual from your list of users, and from the profile on the right, select Reset Password. You can either send the password reset immediately via email, or require them to reset their password the next time they log into the system.

Renaming Users

To edit or rename a user within the Office 365 admin center, go into Users, Active Users and select the individual to be changed. From the profile on the right, select Edit to select first and last name, display name, modify the user name, or to add additional details such as title, department, office and office phone. Back in the list of Active Users, you can also select an individual and reset their password, edit their role (such as making them an administrator), or delete their profile from the system entirely.

Removing or Restoring a User

An administrator has the ability to remove or restore users within Office 365. Removing a user from the platform frees the Office 365 license for that user, allowing you to assign it elsewhere. Of course, removing a user does not delete their data or history from the system, but stores it for 30 days. If the user is restored within those 30 days, the user account and all associated data will also be restored.

(When it comes to user lifecycle management, a third party cloud-to-cloud backup tool is essential. A solution like [Backupify](#) will keep a new user protected with a secure, second copy of their data while also managing all their data upon departure.)

To delete a user, as mentioned above, go into the Office 365 admin center under Users, Active Users and select the user name, and from the profile at the right, select Delete and confirm. To restore a user, go into Users, Deleted Users and select the user name, and from the profile at the right, select Restore User.

Helping your users move to Office 365



The preceding directions helped you to setup your Office 365 account and add your users – but the most important role of an Office 365 administrator is to ensure that your end users are collaborating successfully on the platform. You might have the most perfectly constructed and executed platform, but if end users refuse to take advantage of the platform, you’ve wasted your time and money.

As part of the new user experience, it is good to understand what your end users will see – and to monitor and measure which tools they use, and get feedback on what might not be working. In this section, we’ll walk through some of the areas where you can best help your users to get the most out of the platform.

First off, as users login to the platform, they’ll be taken first to the Office 365 home page, where they can immediately begin setting up their email and calendar, create content in Word, Excel, and the rest of the Microsoft Office online suite, or immediately start working in SharePoint.

Here are some other areas that can help spark productivity in the user experience:

Download and Install Office on Your Pc or Mac

Office 365 Tutorial Link: [Download and install Office using Office 365 for business on your PC or Mac](#)

If your Office 365 licenses include the full version of the Office suite, you can download the necessary programs to your desktop, allowing you to work online or offline. Just click on ‘Install now’ at the top right of your screen, and follow the prompts. As content is created in Office, users will have the ability to save their content locally, or in the cloud using their OneDrive for Business account as part of Office 365.



Configuring Outlook on the desktop

Office 365 Tutorial Link: [Set up your Office 365 mailbox in Outlook](#)

Users have the ability to use the Outlook Web App via their favorite browser, through the desktop version of Outlook installed on their computer, as well as through their mobile device. Microsoft provides high-level steps for each setup:

- [Outlook Web Access](#)
- [Desktop](#)
- [Mobile](#)

Migrating Legacy Email Accounts to Office 365

Office 365 Tutorial Link: [Migrate email and contacts to Office 365 for business](#)

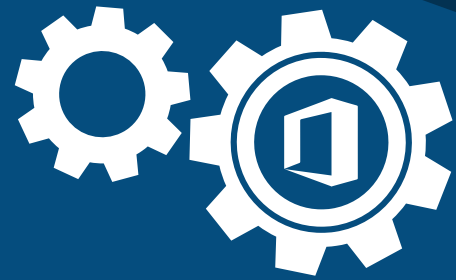
Email remains the most popular collaboration and messaging platform with users, so it is important that you help them move historical email content to the new Office 365 platform. In the tutorial included above, Microsoft provides guidance on the most common email migration scenarios, allowing users to copy email, contacts, and calendars.

Installing Office 365 Mobile

Office 365 Tutorial Link: [Office 365 mobile setup – Help](#)

Mobile continues to be the fastest growing technology segment, and users expect to be able to access all of their email and content from any device, whether personal and for work. The tutorial above walks through the steps for setting up your Android, iOS, or Windows devices so that you can access email, the mobile version of the Office suite of productivity tools, as well as additional Office 365 business services, such as OneDrive for Business, Skype for Business, and Yammer.

Office 365 Service Management



Office 365 Tutorial Link: [Office 365 Service Management](#)

To wrap up this eBook, let's focus on the ongoing administration of Office 365. Your service management model, with its policies and procedures for planning, delivering, operating, and controlling your Office 365 environment, will have a huge impact on the ongoing success of the platform within your organization. The goal is to keep the platform running efficiently, with minimal maintenance impacts to your end users, and to encourage and enable adoption and productivity.

Within the Office 365 platform, there are a number of services available based on the type of license purchased, but here we will focus on four key service management topics:

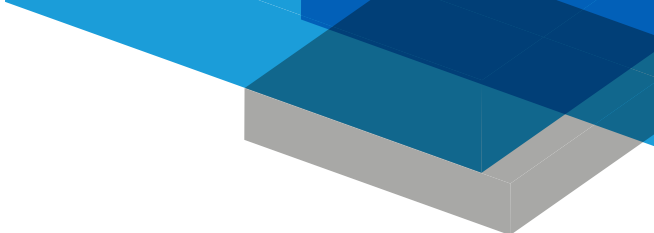
- Enabling and disabling Office 365 services
- Managing Office 365 service updates
- Configuring OneDrive for Business
- Configuring Yammer

For additional training on the service management role in Office 365 and the expanded list of services available through the platform, check out the [Microsoft Virtual Academy](#), which offers several free tutorials on the topic.

Enabling and Disabling Services

The Office 365 admin center provides a comprehensive view into all of the services currently running, services available for purchase (through upgrade), and the health of those services. To view the services running within your Office 365 environment, go to <https://portal.office.com/servicestatus/servicestatus.aspx>

The various Office 365 services are tied to each license type – upgrading to a premium licensing plan will enable additional service not available through personal and small business plans, such as Skype for Business and PowerBI capabilities. Within the Office 365 admin center under Service Settings, administrators have the ability to change basic settings for each individual



service, in some cases enabling and disabling these services. In the Admin section, you have access to additional controls around each service based on your administrative rights for each individual service.

Service Updates

As an administrator, it is important to keep your eye on all planned (and unplanned) maintenance events. Office 365 provides a dashboard view into upcoming and historical maintenance events. If logged into your environment, you can see these at <https://portal.office.com/servicestatus/ScheduledMaintenance.aspx>, or you can navigate to the Service Health section of the Office 365 admin center. Within the Service Health dashboard, you can click on specific service outages or events, by date, for more details around the service interruption and current status.

Conclusion

We have barely scratched the surface of what the Office 365 platform is capable of, but the activities outlined in this eBook should help you quickly get your core services up and running, and help you to onboard your users quickly and easily. For advanced topics, please see the free online training course [Managing Office 365 Identities and Services](#) that is available through the Microsoft Virtual Academy website.

For more best practices, case studies, and ideas on how to expand the use of Office 365 within your organization, be sure to check out the Office 365 Customer Success Center <http://success.office.com/>