SOP: User and License Management

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1. Purpose

To establish standardized procedures for the creation, management, and deactivation of user accounts, as well as the assignment of administrative roles and Microsoft 365 licenses. This ensures users have appropriate access aligned with their job responsibilities while maintaining compliance with internal and external requirements.

2. Scope

This SOP covers the following areas within the Microsoft 365 Admin Center:

1. **User Account Management:** Creating, updating, disabling, and deleting user accounts to ensure accurate identity lifecycle management.

2. **License Management:** Assigning, modifying, and removing Microsoft 365 product licenses based on user roles, departmental needs, and compliance requirements.

3. **Role Assignment:** Assigning and updating administrative roles to users following the principle of least privilege.

4. **Access Reviews:** Conducting regular reviews of user accounts, roles, and license usage to maintain access control integrity and cost efficiency.

5. **User Offboarding:** Revoking access, reclaiming licenses, and deactivating accounts for offboarded users in alignment with organizational security policies.

3. Prerequisites

- Admin access to Microsoft Admin Center

- MFA enabled on the admin account

- Access to user onboarding information (e.g., full name, department, title, email, required applications)

- Up-to-date licensing plan availability

4. Procedures

4.1 User Account Creation

1. **Log into Microsoft Admin Center**

   o URL: https://admin.microsoft.com

   o Authenticate using MFA

2. **Navigate to Users > Active Users**

   o Click **"Add a user"**

3. **Enter user information**

   o First name, last name

   o Username (format: firstnamet@company.com)

   o Set password preferences (auto-generate or create)

   o Require password change on first login

4. **Assign product licenses**

   o Select appropriate Microsoft 365 license(s)

   o Assign service options as required (Exchange, Teams, SharePoint, etc.)

5. **Configure user settings**

   o Choose location (e.g., United States)

   o Add to necessary groups

   o Assign optional settings like mailbox size, email aliases

6. **Review and confirm creation**

   o Click **"Finish Adding"**

   o Record the user ID and assigned licenses

Note: Please refer to this link for detailed instruction on user creation using Microsoft Admin.

4.2 Role Assignment

1. **Determine required role**

- Review onboarding request or department guidelines

- Identify if the user needs elevated access (e.g., Helpdesk Admin, Intune Admin)

2. **Navigate to Roles > Admin roles**

- Use the search bar to find the appropriate role

3. **Assign role**

- Click on the role > Select **Assigned Admins** > Click **Add**

- Choose the user and confirm

- Document the reason and date of role assignment

4. **Review role scope**

- Apply restrictions as needed (e.g., scoped admin roles for specific groups)

4.3 License Allocation

1. **Go to Billing > Licenses**

- Review available licenses and ensure sufficient inventory

2. **Assign license to a user**

- Navigate to Users > Active Users

- Select the user

- Click **Licenses and Apps** tab

- Enable required licenses (e.g., Microsoft 365 Business Premium)

- Configure service settings (e.g., disable Yammer or Stream if not required)

3. **Save changes**

- Click **Save changes**

- Verify changes have been applied successfully

4. **Document license assignment**

- Record in the internal license tracking document

- Note the effective date and product SKU assigned

4.4 Review and Update User Accounts

1. **Conduct audits of user roles and licenses**

   o Identify inactive users

   o Reclaim unused licenses

   o Remove unnecessary admin roles

2. **Make adjustments**

   o Use filters to list users by role, license, or last sign-in

   o Modify or remove roles and licenses as needed

4.5 Deactivating/Deleting Users

1. **Offboarding or Termination**

   o Navigate to Users > Active Users

   o Select the departing user

   o Click **Block sign-in**

   o Reassign shared resources (e.g., mailbox, OneDrive)

2. **Remove licenses**

   o Navigate to **Licenses and Apps** tab

   o Uncheck all assigned licenses

   o Save changes

3. **Delete the user (if required)**

   o Click **Delete user**

   o User will move to **Deleted Users**

   o Retention is typically 30 days

4. **Restore if needed**

   o Navigate to **Deleted Users**

   o Click **Restore user**

   o Re-assign licenses and settings

5. Conclusion

This SOP ensures secure and consistent management of user accounts, roles, and licenses, helping maintain proper access controls, optimize license usage, and support compliance across the Microsoft 365 environment.