Microsoft

Office 365
Provisioning Guide

Microsoft in Education
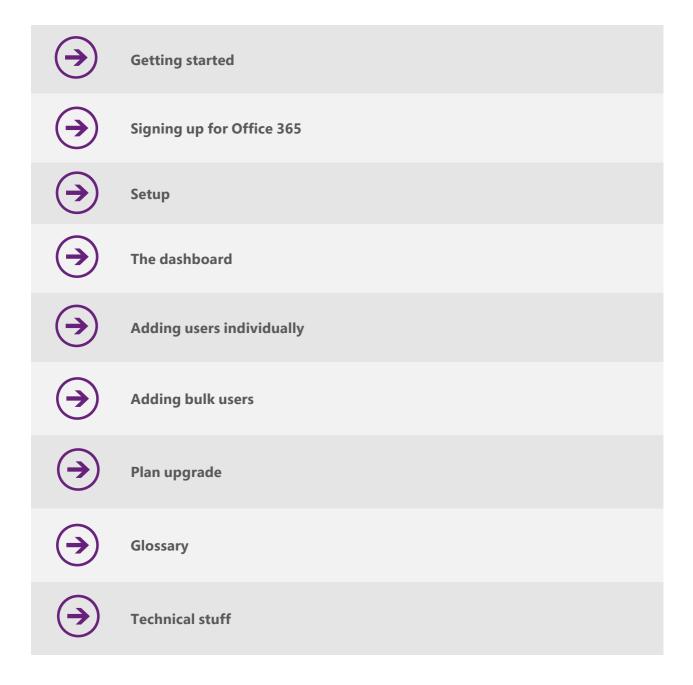
We are partners in learning.
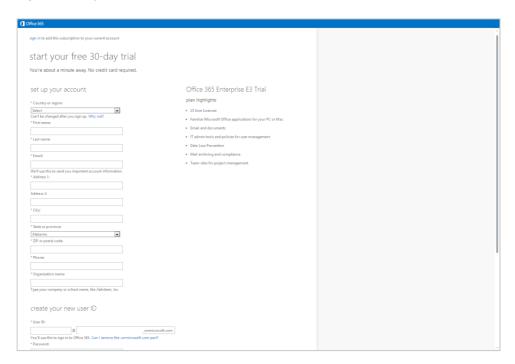
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1. To get started

- Before setting up your Office 365 site (known as a **tenancy**) you should run a check on your educational institution's computers and mobile devices to make sure they have an up to date operating system and browser. You can see a complete list of the **technical stuff** at the end of this guide.
- You might also need to reset your firewall to allow Office 365 to work. Details of how to do this can also be found in the **technical stuff** section.
- You should have the details of your domain name and access to your service provider dashboard, as you will need this for verification of your domain name.

2. Signing up for Office 365

- Go to the Office 365 portal to set up your account. The portal can be found at **http://aka.ms/o365EduZa** - click on **Try now** and you will see a screen that looks like this:
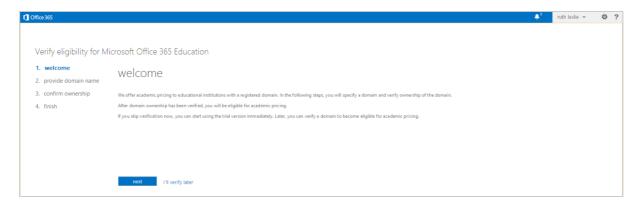

- Be careful when selecting your username as it cannot be changed once entered. When you have completed this form (ensuring you have selected the correct location country) click on **next**.
- You will now be able to complete the **verification** process. This will register your educational institution, college or university as an Education User, which will allow you access to the Office 365 Education A2 Plan and you will be able to upgrade from the trial version you've just signed into.
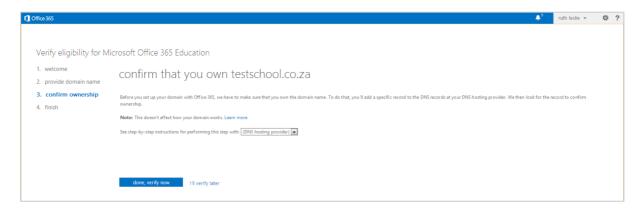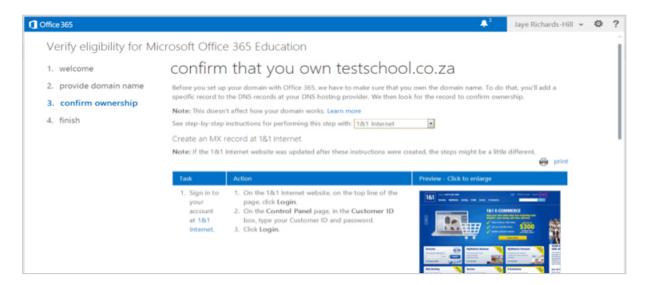
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- The **Verification** window will look like this:

- Click on **next** and enter your educational institution's details in the box.
- This will usually be your website and email name. For example, we used **testschool.co.za** while writing this guide.
- You will then be prompted to allow a verification process via your provider. This will enable Office 365 to check to see that you are a genuine academic institution.
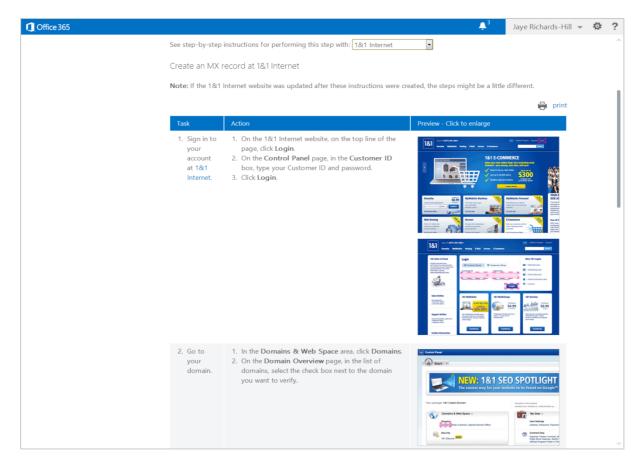- The screen you see should look like this:

- Select your service provider from the drop-down menu and follow the instructions that appear. This will start the verification process for your educational institution.
- For example, this what your screen would look like if you use internet provider 1&1:

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- Scrolling down, you will see a step-by-step series of instructions:

Make sure you follow the instructions given by your service provider. Your trial will not be upgraded unless your domain name is successfully verified.

If you do not own your own domain, you will need to contact your local Microsoft Authorised Education Reseller (AER) to verify your status in another way. Usually this will be by providing proof of academic status, such as a document from the Education department if you are a school.
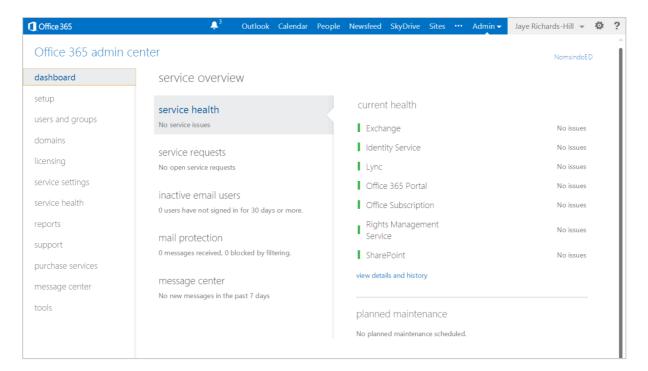
Microsoft has now partnered with GoDaddy.com to help you set up your own domain if you don't already have one. If you don't, all of your email addresses will include **onmicrosoft.com** rather than your institution name, so having your own domain might become important in time.

Once this domain verification process is complete, you will be taken through to your Office 365 homepage, known as your **dashboard**.
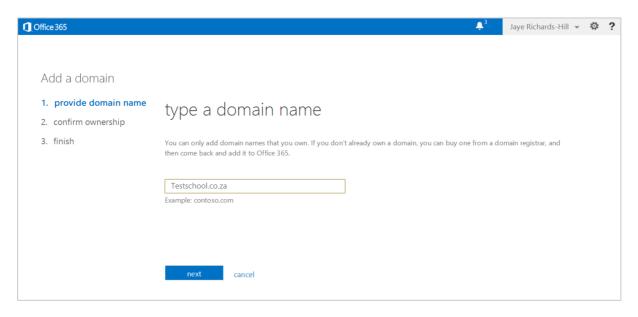
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You should see this screen:

- On the left side of the page you will find your administration functions.
- Click on **Setup**.
- This will take you to the **Quick Start** menu where you will choose your Office 365 domain name (this will appear on your Office 365 emails and other Office 365 services).
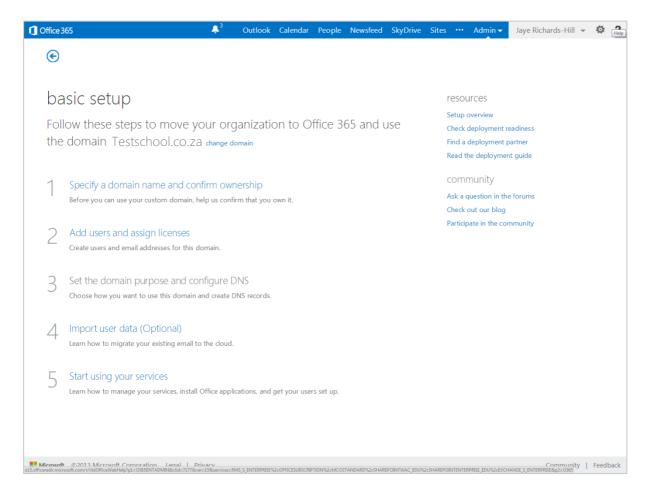- The screen you see should look like this:

- You will be given the option of keeping your educational institution's name (the one you entered during the verification process) or choosing a new name for your email.
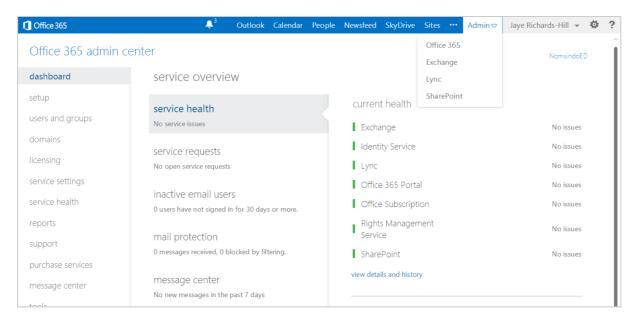
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Once you have completed this step you will be taken to a five-step options page.
It should look like this:

- Click the arrow at the top left of the page to take you back to your Office 365 dashboard.
- You will now start adding users to your site (it's called a **tenancy** in 365-speak). To complete the setup, you need to invite your educational institution community to join the site.
- Have a look around your Office 365 dashboard. The tabs at the top of the page to the right are for the various tools you will be using. This toolbar will always be visible no matter what you are doing on your Office 365 site. It will be covered in later guides.
- Click on the **Admin** tab.

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A drop-down menu will appear. It should look like this:

- Clicking on the **Office 365** tab in the drop-down menu will always return you to your dashboard.
- Exchange would be your email service if you choose to transfer you existing email system.
- Lync is your video-conferencing and real-time productivity tool.
- You can use SharePoint to construct a public website for your educational institution, and you can also set up internal groups of users, for example, teachers, lecturers, admin, or even individual class and subject sites.
- The other tabs on the top toolbar are for other functions you will be using. Other guides will take you through using these tools.
- The list on the right-hand side of the dashboard page contains some shortcuts and links to external sites. There is an Office 365 Community forum here where you can leave questions for other users and experts on all aspects of using Office 365.
- The menu at the left-hand side of your dashboard page lists the administration functions you might need to use. Don't worry about these for the moment - you will be able to access guides explaining many of these advanced functions.

You have now set up your educational institution Office 365 site. As you were doing this, you will have noticed many functions and areas that we have not covered. This setup guide covers the basic functions necessary to get you going. As you get more used to Office 365, you will be more confident and able to explore some of the more advanced functions.

There are online guides for Office 365 that take you through these, however, many are for business and corporate users and not necessary for educational institutions so don't worry if you think you are only using a small part of Office 365.
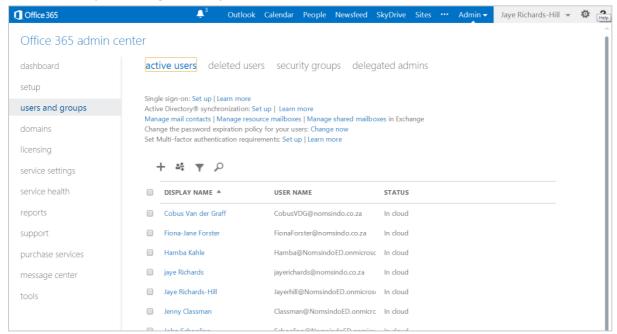
You can now start to add your educational institution community members to the site. These may include teachers, lecturers, students, administration staff and even parents if you wish. You can do this individually or by **bulk upload**. The next part of this guide will take you through both processes.

3. Adding users to your site individually

- Your **users** are your educational institution community. This normally means teachers, lecturers and students as well as administration staff, but who you add is entirely up to you and your educational institution.

- You might want to add parents and carers, or other people who work in the educational institution such as religious leaders and medical team members.

- Once you have added your users, you will send them an email with their Office 365 login details and temporary passwords. They can then log in, reset their passwords and start to use all the features of the Office 365 platform.

- Go to your dashboard page and click on **users and groups** in the left-hand side menu. This will take you to the area where you will begin to add your users. Your screen should look like this:
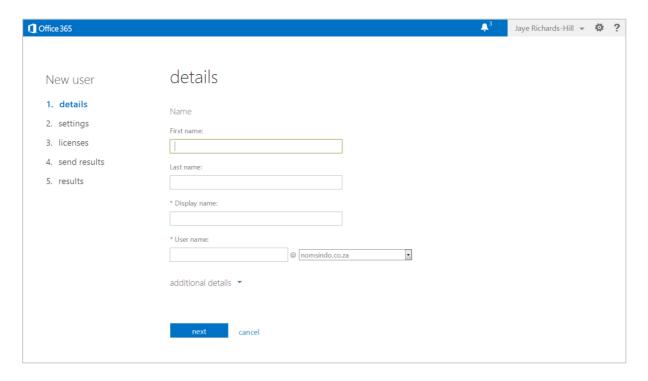

- Have a look around the screen. You will probably understand the functions of many of the buttons, but don't worry about those you do not as you will probably not use many of them. Others will become more familiar as you become a more advanced user in time.

- Your own screen will be blank apart from your name, but you will notice in the screenshot above that some users have already been added to our test school.

- To add a new user, click on the **+ symbol**, located above **Display Name**.
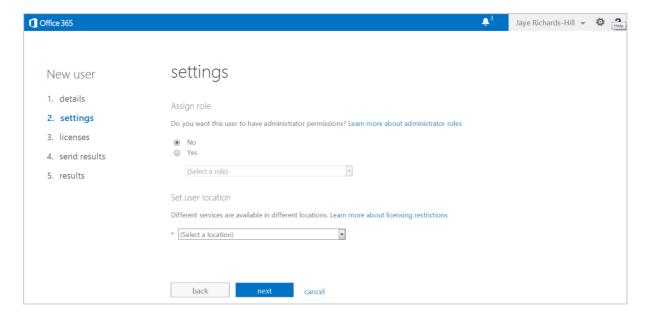
- Adding user details is simply a matter of typing their information into the boxes. Your screen will look like this:

- If you wish, you can complete the **additional details** section by opening the drop-down menu underneath the details section.
- This is particularly useful for recording information about members of staff.
- When you choose a user name for the new user, a login user name is generated.
- Click on **next**. The next page allows you to set the permissions and enter the location of each user. It will look like this:
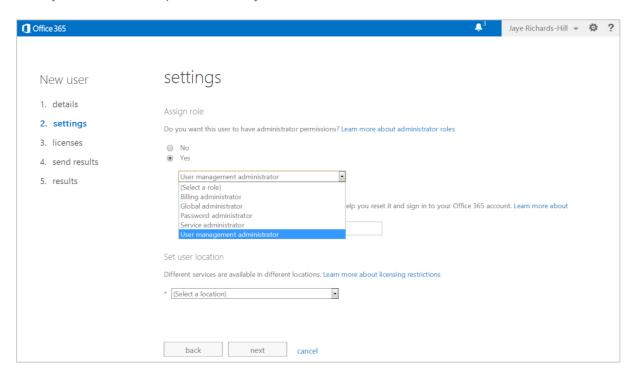

- You now need to decide which permissions to assign to your new user.

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- They require administration permissions if they will need to be able to reset lost passwords and create their own groups to invite other users to join.
- Think carefully about the role each user has in your educational institution.
- Teachers or lecturers might need to be able to set up their own workspaces and groups, and reset student passwords.
- You might therefore wish to assign administration permission to all staff. When you select **Yes** you will be able to choose the level of administration rights from the drop-down menu below.
- **Important** - you need to be an administrator in order to be able to set up **SharePoint sites.**

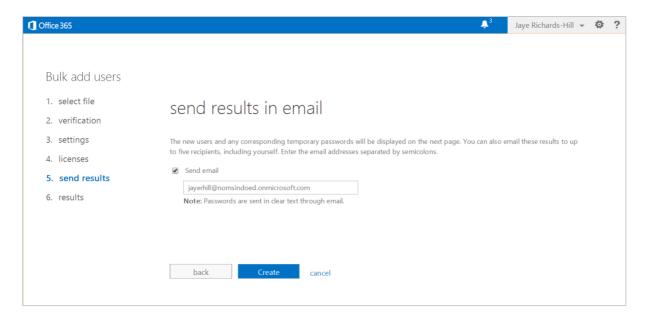When you click on the drop-down menu, your screen will look like this:

- You can learn more about each admin role by clicking the link above the choice box. This explains what each of the five roles means.
- In practice, your staff will probably need to have **User management administrator** permissions with one or two people in your educational institution having the top level **Global Administrator** role.
- You can reassign permissions whenever you need to.
- You also have the option to set an external email address for password recovery for administrators here. This should be their own email address.
- Select the location of the new user and click on **next**.
- You will then be taken to the next page where you assign a **licence** to the new user. The options are Faculty (staff) or Student.
- You can remove access to certain services by unchecking the boxes on this page. For example, you might decide that your students will not be using Lync (the video conferencing tool).
- The trial version limits you to 25 of each licence. This limitation will disappear once your domain verification checks have been completed by Office 365 and you have upgraded your plan from the trial to Office 365 Education Plan A2. Once you have assigned a licence to the new user, click on **next** to be taken to the final page in the process of setting up new users.
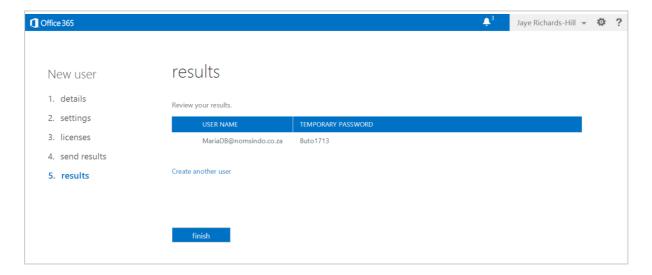
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You can now set up an option to email the new user's login details. The page will look like this:

- This is a useful feature that can save you from having to print and manually distribute new user login details.
- When you have done this, click **Create** and your new user login details will be displayed on the next page like this:
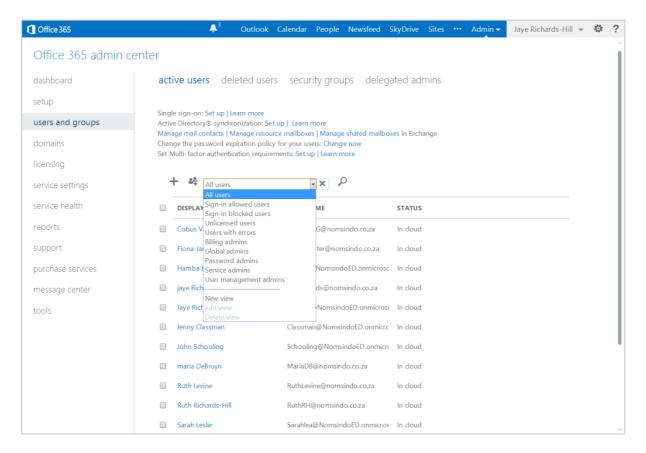

- You can now carry on and create more user accounts, or select **finish** and return to your Office 365 Users and Groups page where a list of active user accounts will be displayed.
- Now select the **funnel icon** (above the display names) to filter this view to only certain users.

Open the drop-down menu to view the different user categories available.

This will look like this:

- There is also a **Search Icon** that allows you to search quickly for individual users. This is useful as all of your active users will be displayed in your users list.

4. Adding bulk lists of users using a .csv file

- From your Office 365 dashboard, select **users and groups** from the menu on the left side of the screen.
- This will bring up your list of active users.
- Go to the four icons above the display names and click on the second icon from the left.
- This gives you the option to select your .csv file for uploading. If you don't have one, you now have the option to download a blank copy for completion.
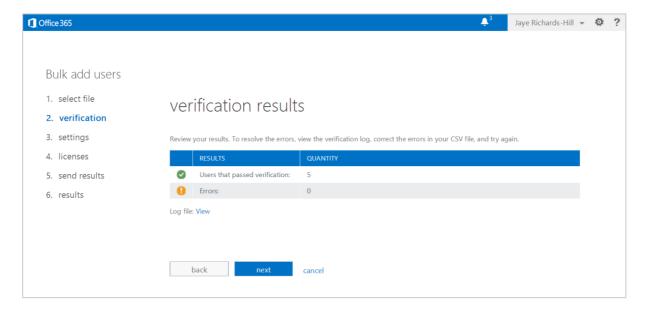
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- The screen will look like this:

- Your .csv file is an Excel spreadsheet that must be in a particular format in order to be imported successfully.
- You can download a sample spreadsheet and a template (by clicking on the links on this page) into which you can import data from your own educational institution records.
- You should only use this option if you are familiar with .csv files and spreadsheets.
- Click on **Browse** and select your .csv file. Then click **next** to upload the file.
- Follow the step-by-step instructions on the screen. They are similar to when you added users individually.
- You will assign permissions and licences and generate login details in exactly the same way as before except that this method is quicker if you have large numbers of users to add.

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- If any errors appear, go back to your .csv file and correct the formatting then try to upload it again. If there are no errors, click on **next**. You will then see this screen:

- Provided you want your new users to be able to access Office 365 immediately, select **Allowed.**
- Select their location from the drop-down menu.
- Click on **next**.

- When you see the screen above, choose which licence and services to assign to your new users. This will be either staff (faculty) or students. You can also choose individual services.

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- When you have done this, click on **next**.
- You should then see this screen:

- Select the **Send email** box, the log in details of your new users will be sent to your email address.
- Click **Create** to set up your new users.
- You can then return to the **users and groups** page where you will see your new users appear in the **Display names** list.

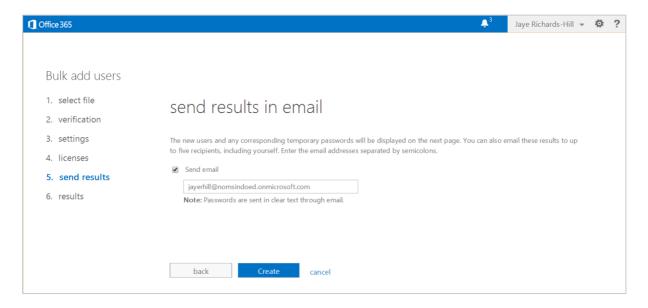Once you have set up your site and added users, you are now ready to start using Office 365 functions across your educational institution.

Separate guides will show you how to use all of the different tools and functions, and enable you to help your educational institution staff and students get used to using Office 365 as well.

Remember if you get stuck, you can always return to your Office 365 dashboard and start again!

5. Upgrading from your free trial

Once your domain has been verified as a bona fide education institution you will be able to convert to the Office 365 Education A2 Plan when your 30 day trial comes to an end.

- Go to your dashboard.
- From the left-hand menu, select **purchase services.**
- Select the option for **Office 365 plans for education.**
- You will be taken to the screen where you will be able to enter the number of licences for each type (faculty and student). You will see that the licences are free. Select the number of licences you think you will need.
- Add these to your cart and go to the checkout area. You will not be charged for these licences.

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6. Glossary

Jargon Buster	
Administration rights	Assigning these permissions to users enables them to provision new users, change and assign passwords, and set up sites within your educational institution's tenancy.
.CSV File	(Comma Separated Values) is a text file that can be opened by any spreadsheet or text editor (word processor).
Dashboard	This is the page that contains all the command and function links, buttons, icons and tabs.
Domain	Your domain is the custom web address registered for your educational institution. There is an annual fee for owning a domain.
Drop-down menu	A menu that opens when you click on a button, icon or tab, displaying a series of options for you to choose from.
Firewall	A security system or device that prevents outsiders from accessing a private system. This could be your own computer or an internal network e.g. at work.
Formatting	Arranging data in a particular way for it to display properly in a particular file.
Hosting service provider	The company that hosts your web space and can provide your domain. You will usually pay a monthly fee for this service.
Icon	A symbol or representation indicating a specific function.
ISP	Internet Service Provider
Password	A secret code that is required each time you sign in to Office 365. It should be known only to you and is unique to you.
Permissions	These are the level of rights and responsibilities you assign to your users, such as whether users are allowed to change passwords and set up their own spaces within your institution's tenancy.
Platform	This is another name for a suite of tools such as Office 365.
Portal	The webpage from which you enter Office 365.
Services	The different tools that are available to use from the Office 365 portal.

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Spreadsheet	A computer file used mostly for accounting, in which figures are arranged in a grid of rows and columns.
Tab	A link to a page, function or tool that often looks like the physical tabs used as file dividers or at the edge of a cardboard file.
Tenancy	This is the space your educational institution occupies within the Office 365 ecosystem.
Toolbar	A vertical or horizontally arranged line of command buttons, tabs or icons.
User name	This is the name by which you will be visible to other users within Office 365.
Users	Users are the people who will be able to use your tenancy within Office 365.
Verification	This is the process of having your domain checked by Microsoft as being connected to or used by a genuine educational institution or organisation.

7. Technical Stuff

Office 365 requires the following software:

- The current or immediately prior version of Internet Explorer, or the latest release of Chrome, Firefox or Safari.
- Any version of Microsoft Office in mainstream support.

Version	
Google Chrome	Latest version can perform all browser-related tasks
Firefox	Latest version can perform almost all browser-related tasks
Safari	Latest version can perform almost all browser-related tasks
Mobile Devices	Not included
Internet Explorer 10	Dependent on Operating System - must have Windows 7 or 8 Windows server 2012, 2008 and Windows 7 32-bit version can be used for all Office 365 tasks

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	64-bit version can be used for almost all Office 365 tasks
Internet Explorer 9	32-bit version can be used for almost all Office 365 tasks
	64-bit version can be used for most Office 365 tasks
Internet Explorer 9	Windows 7 or Vista SP2
Internet Explorer 8	Windows7 Vista SP2, XP-SP3 (32 bit), XP-SP2 (64-bit)
Internet Explorer 7	Not supported
Office 2010 Service Pack 1 (Service Pack 2 Recommended)	Windows 7, 8, Vista SP2, XP-SP3 (32-bit), XP-SP2 (64-bit)
Office 2007 with Service Pack 3	Windows 7, 8, Vista SP2, XP-SP3 (32-bit), XP-SP2 (64-bit)
Office for Mac 2011 with Service Pack 3	Mac OS X 10.6 or later

About Firewalls

To download and install some updates, Office 365 desktop setup needs to connect to the **Microsoft Update** service. However, in some networks, access to sites and services that are outside of your company's firewall are blocked by the system administrator. If you cannot access the Microsoft Update service, you need to contact your system administrator for assistance.

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