

A photograph of a male teacher with glasses and a red bow tie, and a young female student with curly hair, both smiling and looking at a tablet computer. The teacher is pointing at the screen. The background is a bright window.

Office 365 Provisioning Guide

Microsoft in Education

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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:

The screenshot shows the Office 365 sign-up page. At the top, it says "sign in to add this subscription to your current account" and "start your free 30-day trial". Below this, it says "You're about a minute away. No credit card required." The page is divided into two main sections. The left section is titled "set up your account" and contains several form fields: "Country or region" (a dropdown menu), "First name", "Last name", "Email", "Address 1", "Address 2", "City", "State or province" (a dropdown menu), "ZIP or postal code", "Phone", and "Organization name". Below these fields, it says "We'll use this to send you important account information." The right section is titled "Office 365 Enterprise E3 Trial" and lists "plan highlights" such as "25 User Licenses", "Familiar Microsoft Office applications for your PC or Mac", "Email and documents", "IT admin tools and policies for user management", "Data Loss Prevention", "Mail archiving and compliance", and "Team sites for project management". At the bottom of the page, there is a section titled "create your new user ID" with a "User ID" field and a "Password" field. A note below the password field says "You'll use this to sign in to Office 365. Can I remove the .onmicrosoft.com part?"

- 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.

- The **Verification** window will look like this:

Office 365

Verify eligibility for Microsoft Office 365 Education

1. **welcome**

2. provide domain name

3. confirm ownership

4. finish

welcome

We offer academic pricing to educational institutions with a registered domain. In the following steps, you will specify a domain and verify ownership of the domain.

After domain ownership has been verified, you will be eligible for academic pricing.

If you skip verification now, you can start using the trial version immediately. Later, you can verify a domain to become eligible for academic pricing.

[next](#) [I'll verify later](#)

- 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:

Office 365

Verify eligibility for Microsoft Office 365 Education

1. welcome

2. provide domain name

3. **confirm ownership**

4. finish

confirm that you own testschool.co.za

Before you set up your domain with Office 365, we have to make sure that you own the domain name. To do that, you'll add a specific record to the DNS records at your DNS hosting provider. We then look for the record to confirm ownership.

Note: This doesn't affect how your domain works. [Learn more](#)

See step-by-step instructions for performing this step with: [DNS hosting provider](#)

[done, verify now](#) [I'll verify later](#)

- 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:

Office 365

Verify eligibility for Microsoft Office 365 Education

1. welcome

2. provide domain name

3. **confirm ownership**

4. finish

confirm that you own testschool.co.za

Before you set up your domain with Office 365, we have to make sure that you own the domain name. To do that, you'll add a specific record to the DNS records at your DNS hosting provider. We then look for the record to confirm ownership.

Note: This doesn't affect how your domain works. [Learn more](#)

See step-by-step instructions for performing this step with: [1&1 Internet](#)

Create an MX record at 1&1 Internet

Note: If the 1&1 Internet website was updated after these instructions were created, the steps might be a little different.

Task	Action	Preview - Click to enlarge
1. Sign in to your account at 1&1 Internet.	1. On the 1&1 Internet website, on the top line of the page, click Login . 2. On the Control Panel page, in the Customer ID box, type your Customer ID and password. 3. Click Login .	

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


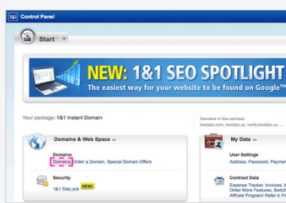
Office 365

See step-by-step instructions for performing this step with: **1&1 Internet**

Create an MX record at 1&1 Internet

Note: If the 1&1 Internet website was updated after these instructions were created, the steps might be a little different.

print

Task	Action	Preview - Click to enlarge
1. Sign in to your account at 1&1 Internet.	<ol style="list-style-type: none"> On the 1&1 Internet website, on the top line of the page, click Login. On the Control Panel page, in the Customer ID box, type your Customer ID and password. Click Login. 	
2. Go to your domain.	<ol style="list-style-type: none"> In the Domains & Web Space area, click Domains. On the Domain Overview page, in the list of domains, select the check box next to the domain you want to verify. 	

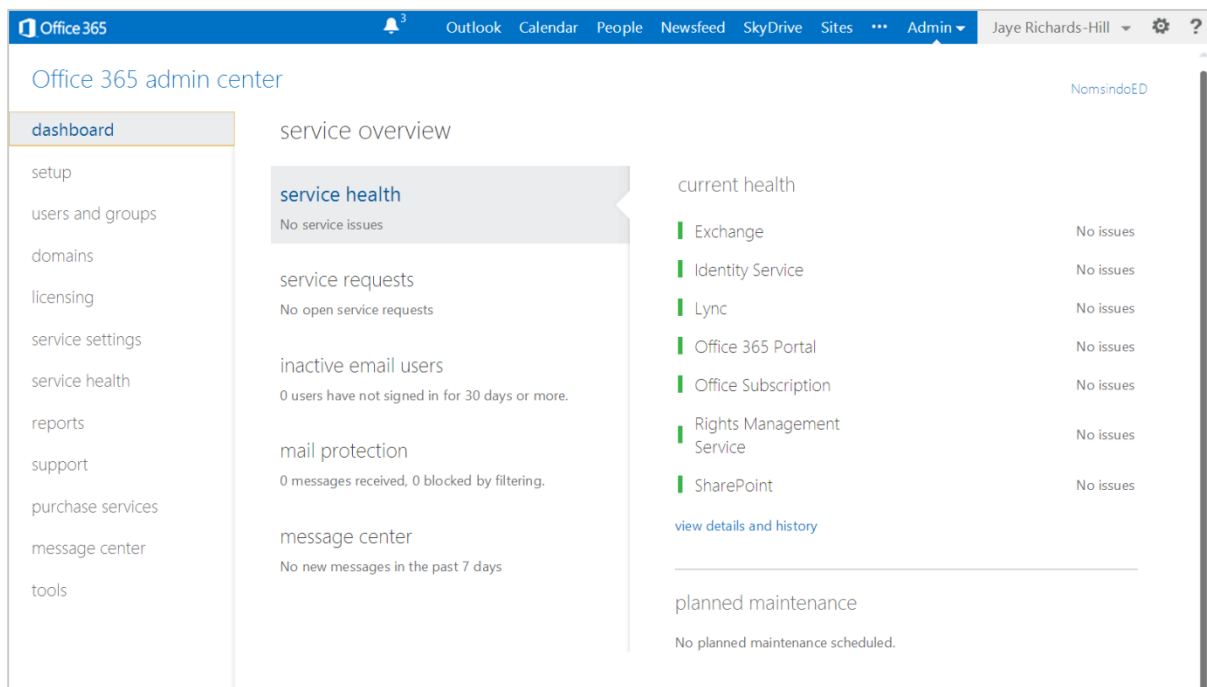
Make sure you follow the instructions given by your service provider. Your trial will not be upgraded unless your domain name is successfully verified.

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.

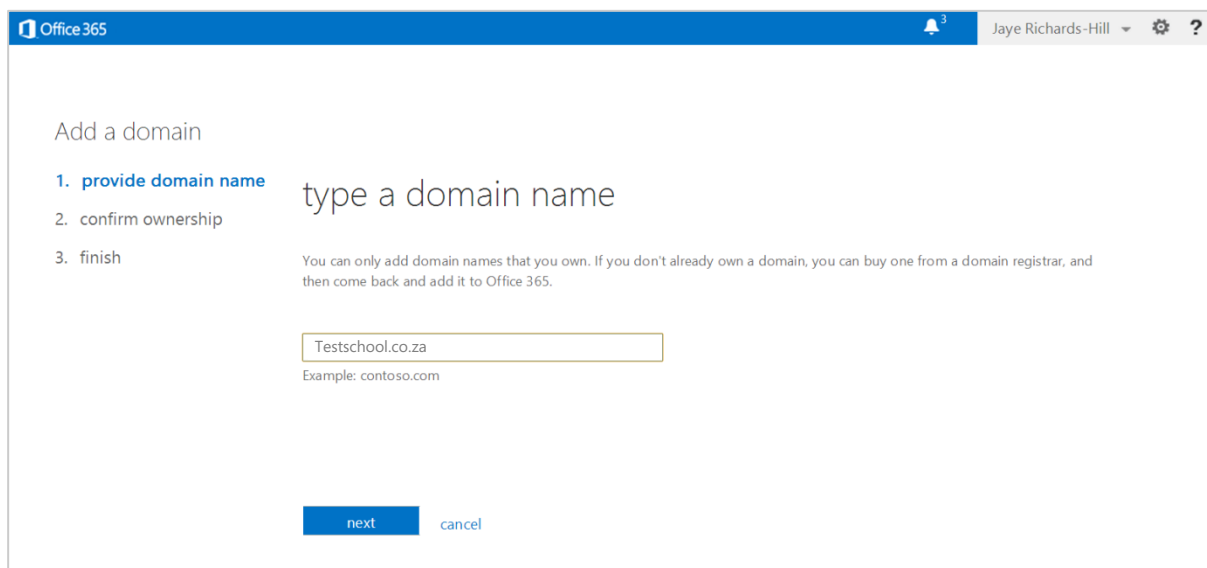
Microsoft has now partnered with GoDaddy.com to help you set up your own domain if you don't already have one. If you don't, all of your email addresses will include **onmicrosoft.com** rather than your institution name, so having your own domain might become important in time.

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

You should see this screen:

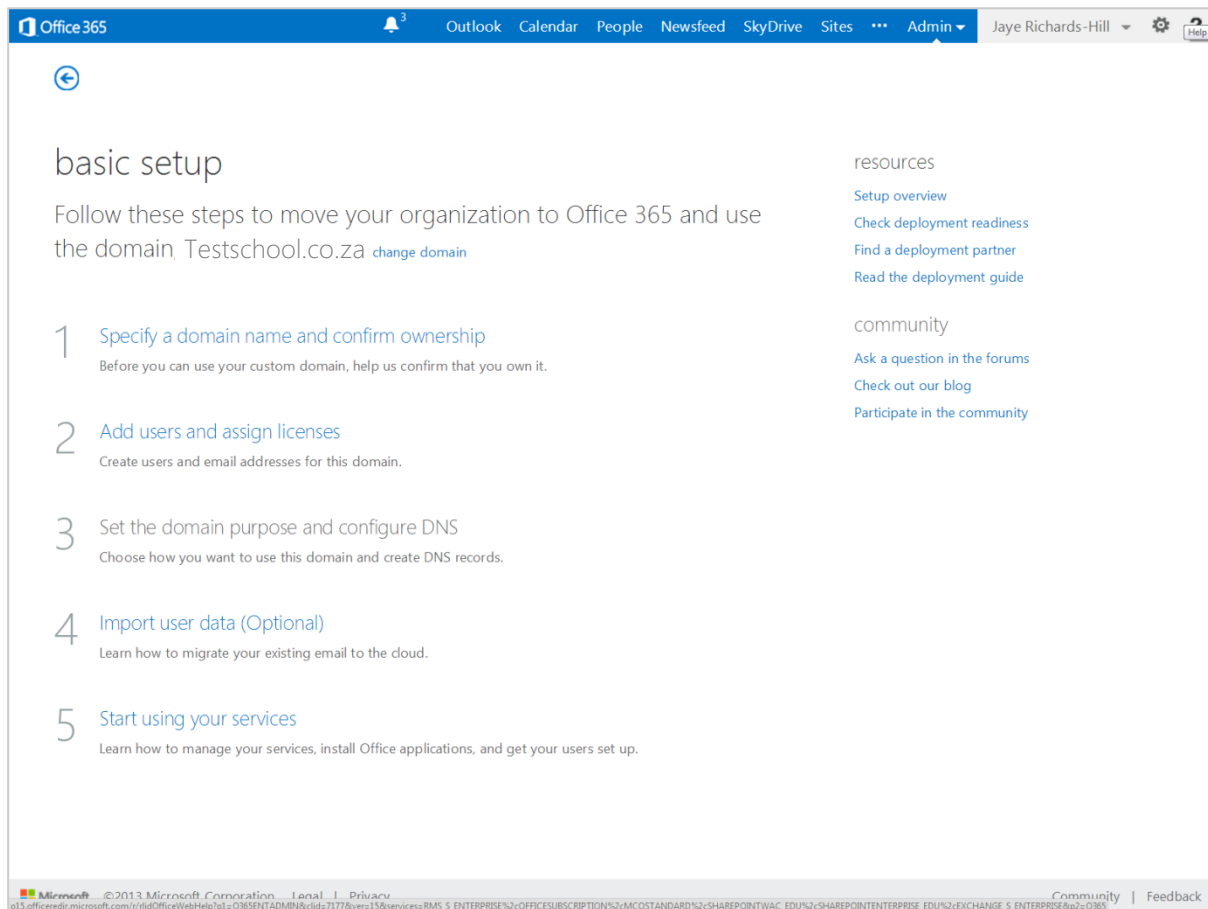


- On the left side of the page you will find your administration functions.
- Click on **Setup**.
- This will take you to the **Quick Start** menu where you will choose your Office 365 domain name (this will appear on your Office 365 emails and other Office 365 services).
- The screen you see should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



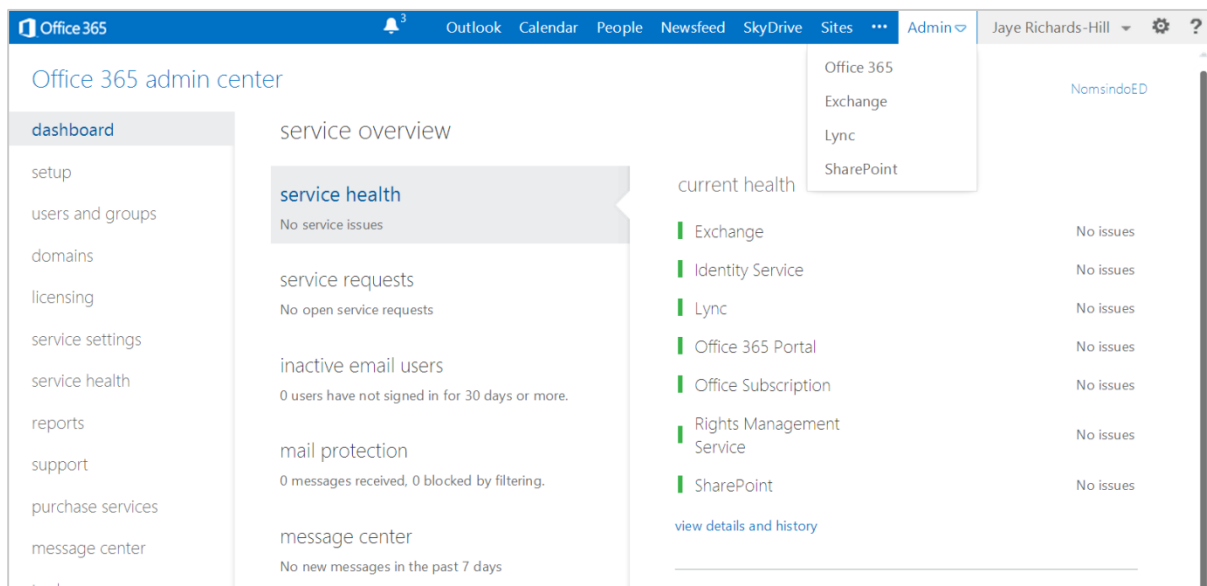
- You will be given the option of keeping your educational institution's name (the one you entered during the verification process) or choosing a new name for your email.

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.

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 your 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.

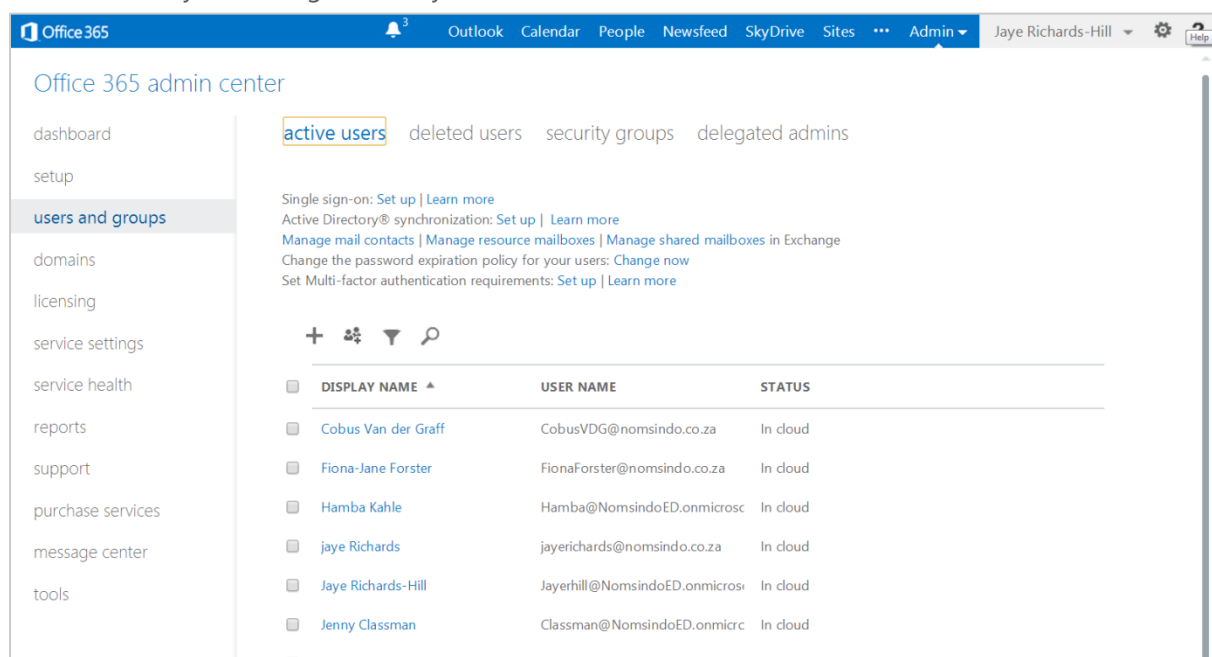
You have now set up your educational institution Office 365 site. As you were doing this, you will have noticed many functions and areas that we have not covered. This setup guide covers the basic functions necessary to get you going. As you get more used to Office 365, you will be more confident and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

The screenshot shows the 'New user details' form in the Office 365 admin center. The left sidebar lists the steps: 1. details (selected), 2. settings, 3. licenses, 4. send results, and 5. results. The main content area is titled 'details' and contains the following fields: 'Name' with sub-fields for 'First name' and 'Last name'; '* Display name'; '* User name' with a dropdown menu showing '@ nomsindo.co.za'; and an 'additional details' section with a dropdown arrow. At the bottom are 'next' and 'cancel' buttons.

- 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:

The screenshot shows the 'New user settings' form in the Office 365 admin center. The left sidebar lists the steps: 1. details, 2. settings (selected), 3. licenses, 4. send results, and 5. results. The main content area is titled 'settings' and contains the following sections: 'Assign role' with a question 'Do you want this user to have administrator permissions?' and radio buttons for 'No' (selected) and 'Yes', followed by a '(Select a role)' dropdown; and 'Set user location' with a note 'Different services are available in different locations.' and a '(Select a location)' dropdown. At the bottom are 'back', 'next', and 'cancel' buttons.

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

- 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:

Office 365

Jaye Richards-Hill

New user

settings

1. details

2. settings

3. licenses

4. send results

5. results

Assign role

Do you want this user to have administrator permissions? [Learn more about administrator roles](#)

☐ No

☒ Yes

User management administrator

(Select a role)

Billing administrator

Global administrator

Password administrator

Service administrator

User management administrator

help you reset it and sign in to your Office 365 account. [Learn more about](#)

Set user location

Different services are available in different locations. [Learn more about licensing restrictions](#)

* (Select a location)

back next cancel

- 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.

You can now set up an option to email the new user's login details. The page will look like this:

The screenshot shows the 'Bulk add users' page in the Office 365 admin center. The left sidebar lists the steps: 1. select file, 2. verification, 3. settings, 4. licenses, 5. send results (highlighted), and 6. results. The main content area is titled 'send results in email'. It contains a checkbox labeled 'Send email' which is checked. Below the checkbox is a text input field containing the email address 'jayerhill@nomsindoe.onmicrosoft.com'. A note states: 'Note: Passwords are sent in clear text through email.' At the bottom, there are three buttons: 'back', 'Create', and 'cancel'.

- 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:

The screenshot shows the 'New user' page in the Office 365 admin center. The left sidebar lists the steps: 1. details, 2. settings, 3. licenses, 4. send results, 5. results (highlighted). The main content area is titled 'results'. It contains a section 'Review your results.' with a table showing the user details. The table has two columns: 'USER NAME' and 'TEMPORARY PASSWORD'. The first row shows 'MariaDB@nomsindo.co.za' and 'Buto1713'. Below the table, there is a link 'Create another user' and a 'finish' button.

USER NAME	TEMPORARY PASSWORD
MariaDB@nomsindo.co.za	Buto1713

- 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:

Office 365 admin center

active users | deleted users | security groups | delegated admins

Single sign-on: [Set up](#) | [Learn more](#)
 Active Directory® synchronization: [Set up](#) | [Learn more](#)
 Manage mail contacts | [Manage resource mailboxes](#) | [Manage shared mailboxes in Exchange](#)
 Change the password expiration policy for your users: [Change now](#)
 Set Multi-factor authentication requirements: [Set up](#) | [Learn more](#)

+ All users

DISPLAY NAME	EMAIL ADDRESS	STATUS
Cobus V	G@nomsindo.co.za	In cloud
Fiona-Ja	ter@nomsindo.co.za	In cloud
Hamba	NomsindoED.onmicrosc	In cloud
Jaye Rich	ds@nomsindo.co.za	In cloud
Jaye Rich	NomsindoED.onmicrosc	In cloud
Jenny Classman	Classman@NomsindoED.onmicrc	In cloud
John Schooling	Schooling@NomsindoED.onmicrc	In cloud
maria DeBruyn	MariaDB@nomsindo.co.za	In cloud
Ruth Levine	RuthLevine@nomsindo.co.za	In cloud
Ruth Richards-Hill	RuthRH@nomsindo.co.za	In cloud
Sarah Leslie	Sarahlea@NomsindoED.onmicrosc	In cloud

- 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.

- The screen will look like this:

The screenshot shows the 'Bulk add users' interface in Office 365. On the left is a sidebar with a list of steps: 1. select file (highlighted), 2. verification, 3. settings, 4. licenses, 5. send results, and 6. results. The main content area is titled 'select a csv file'. It contains instructions: 'To bulk add users, select a CSV file containing user information. To see the required format, download the sample CSV file that follows. [Learn more about CSV files](#)'. Below this is a text input field for 'Path and file name:' followed by a 'Browse...' button. There are two links: 'Download a blank CSV file' with the instruction 'Create a new CSV file from this template using a text editor, such as Notepad.' and 'Download a sample CSV file' with the instruction 'The column headings in your file must match the column headings in the sample. To change the column headings, use a text editor, such as Notepad.' At the bottom are 'next' and 'cancel' buttons.

- 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.

The screenshot shows the 'Bulk add users' interface in Office 365, now at the 'verification results' step. The sidebar highlights '2. verification'. The main content area is titled 'verification results' and contains the text: 'Review your results. To resolve the errors, view the verification log, correct the errors in your CSV file, and try again.' Below this is a table with two columns: 'RESULTS' and 'QUANTITY'.

RESULTS	QUANTITY
✓ Users that passed verification:	5
! Errors:	0

Below the table is a link 'Log file: [View](#)'. At the bottom are 'back', 'next' (highlighted), and 'cancel' buttons.

- 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:

The screenshot shows the 'Bulk add users' settings page in the Office 365 admin center. The left sidebar lists the steps: 1. select file, 2. verification, 3. settings (highlighted), 4. licenses, 5. send results, and 6. results. The main content area is titled 'settings' and includes two sections: 'Set sign-in status' with radio buttons for 'Allowed' (selected) and 'Blocked', and 'Set user location' with a dropdown menu labeled '(Select a location)'. At the bottom are 'back', 'next', and 'cancel' buttons.

- 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**.

The screenshot shows the 'Bulk add users' assign licenses page in the Office 365 admin center. The left sidebar lists the steps: 1. select file, 2. verification, 3. settings, 4. licenses (highlighted), 5. send results, and 6. results. The main content area is titled 'assign licenses' and displays two license options: 'Microsoft Office 365 Plan A3 for Faculty' (44 of 50 licenses available) and 'Microsoft Office 365 Plan A3 for Students' (18 of 25 licenses available). Each option has a list of services with checkboxes: Windows Azure Active Directory Rights, Office Professional Plus, Lync Online (Plan 2), Office Web Apps for EDU, SharePoint Plan 2 for EDU, and Exchange Online (Plan 2). At the bottom are 'back', 'next', and 'cancel' buttons.

- 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.

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

The screenshot shows the Office 365 user provisioning interface. At the top, there's a blue header with the Office 365 logo, a notification bell with '3' alerts, and the user name 'Jaye Richards-Hill' with settings and help icons. The main content area is titled 'Bulk add users' and contains a numbered list of steps: 1. select file, 2. verification, 3. settings, 4. licenses, 5. send results (highlighted in blue), and 6. results. To the right of the list, the heading 'send results in email' is displayed. Below this, a text box explains: 'The new users and any corresponding temporary passwords will be displayed on the next page. You can also email these results to up to five recipients, including yourself. Enter the email addresses separated by semicolons.' There is a checkbox labeled 'Send email' which is checked. Below the checkbox is a text input field containing the email address 'jayerhill@nomsindoed.onmicrosoft.com'. A note below the input field states: 'Note: Passwords are sent in clear text through email.' At the bottom of the form, there are three buttons: 'back' (disabled), 'Create' (active), and 'cancel'.

- 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.

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.

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

	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.