

Office 365 - Getting Started Guide 1.0

The introductory steps to managing your Office 365 subscriptions

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1 Creating a plan

From the admin login portal (<https://portal.microsoftonline.com>), select **Setup** from the menu on the left. This will bring up a wizard whereby you can create a step-by-step plan to deploy Office 365 for a typical configuration.

The first screen will ask you to add an additional domain. Please highlight this option and click **Next** to continue:

Choose a domain

Select the domain you want to use for your email addresses. You can continue to use the domain you created when you signed up (*wave15Agingercouk.onmicrosoft.com*), or you can use your own domain.

- Use **wave15Agingercouk.onmicrosoft.com** [Why should I use this domain?](#)
- Use your own domain [Why should I use my own domain?](#)

You will now be presented with a plan matching the options below. To return to this screen at any time, click **Setup** from the menu on the left.

1.1 Specify a domain name and confirm ownership

From your new deployment steps, select the option to add a domain. Enter the address for your email domain and click **Next**.

type a domain name

You can only add domain names that you own. If you don't already own a domain, you can buy one from a domain registrar, and then come back and add it to Office 365.

Example: contoso.com

Once the wizard confirms the domain is correct, it will provide a DNS TXT record for your domain registrar to add. Contact your domain owner with the information below to request the record be added. If not, please contact your domain registrar. You will find the necessary record in the domain add page:

RECORD TYPE (CHOOSE ONE)	ALIAS OR HOSTNAME	DESTINATION OR POINTS TO ADDRESS	TTL
TXT	@ or [redacted]	MS=ms35834275	1 Hour
MX	@ or [redacted]	ms35834275.msv1.invalid.outlook.com	1 Hour

Note: You only have to create one of the records. TXT is the preferred method, but some DNS hosting providers don't support it. In that case, you can create an MX record instead.

Once the records have been added and taken effect, click **Done, verify now** then **Continue**

1.2 Add users and assign licenses

From the admin login portal (<https://portal.microsoftonline.com>), select "setup" from the left-hand menu to bring up the current setup plan. Select **Add users and assign licenses** to continue.

You can enter new users for any verified domain one at a time or import a CSV file containing all the required information in one go. Please click "New" to begin.

1.2.1 Add users one at a time

Selecting to add users one at a time will bring up a window to create a user account. Please ensure that a **Display Name** and **Username** are entered on the first screen. Other fields are optional and may provide additional functionality for other features, such as dynamic distribution groups or SharePoint audiences.

First name:

Last name:

* Display name:

* User name:

 @

Additional details 

Job title:

Department:

The second screen allows you to give administrative access to the new account. If a user is granted administrative access, an alternate email address must be provided for password reset requests to be sent. This does not necessarily need to be an external account, but must not be the same address as the account. Also please note that you must provide a location for each user account in this screen.

Assign role

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

- No
 Yes

Password administrator

* Alternate email address

If you forget your password, we will use this email to help you reset it and sign in to your Off

test.user@

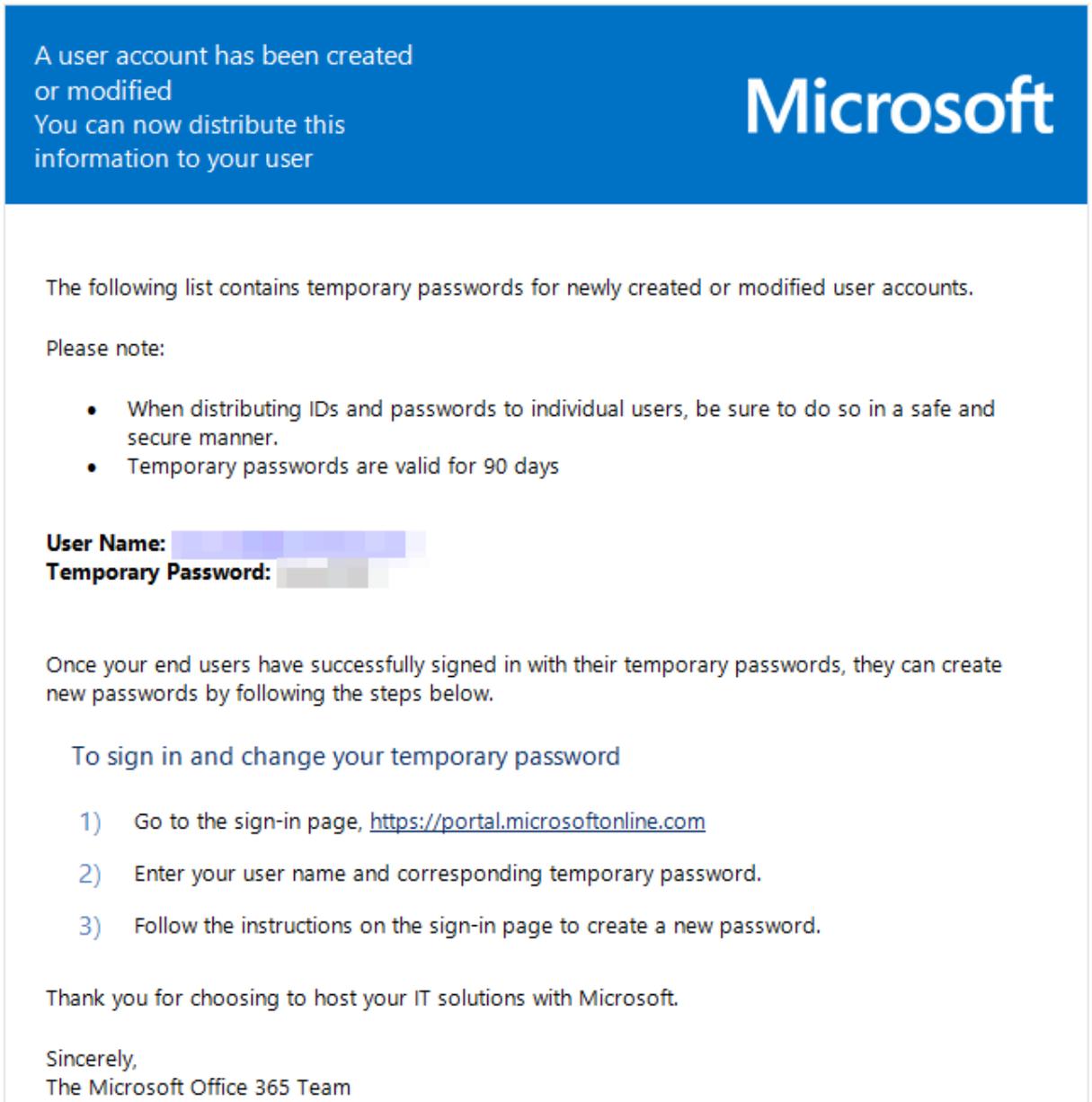
Set user location

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

* United Kingdom

The email received appears as such:

Attention: A user account was created or modified. Retrieve your user's temporary password. | [View this email in your browser](#)



The screenshot shows an email notification with a blue header. The header text reads: "A user account has been created or modified. You can now distribute this information to your user." The Microsoft logo is in the top right corner. The main body of the email states: "The following list contains temporary passwords for newly created or modified user accounts. Please note:" followed by two bullet points: "When distributing IDs and passwords to individual users, be sure to do so in a safe and secure manner." and "Temporary passwords are valid for 90 days". Below this, there are two lines of redacted information: "User Name: [redacted]" and "Temporary Password: [redacted]". The email continues: "Once your end users have successfully signed in with their temporary passwords, they can create new passwords by following the steps below." It then lists three steps: "1) Go to the sign-in page, [https://portal.microsoftonline.com](\"https://portal.microsoftonline.com\")", "2) Enter your user name and corresponding temporary password.", and "3) Follow the instructions on the sign-in page to create a new password." The email concludes with "Thank you for choosing to host your IT solutions with Microsoft." and "Sincerely, The Microsoft Office 365 Team".

Note: a user must log into the Office 365 portal (<https://portal.microsoftonline.com>) and change the default password before they can set their account up in Outlook or a mobile device.

On the third screen you may assign licenses and manually enable/disable individual features for the plan. Manually removing a feature does not allow you to assign this part of the plan to another user.

Finally you may opt to send a welcome email with credentials to an email address. Alternatively you can manually record the credentials from the next screen.

assign licenses

- Microsoft Office 365 Plan E3 24 of 25 licenses available
- Windows Azure Active Directory Rights
 - Office Professional Plus
 - Lync Online (Plan 2)
 - Office Web Apps
 - SharePoint Online (Plan 2)
 - Exchange Online (Plan 2)

If you wish to create another user, please click the relevant link ([Create another user](#)) else click finish to complete this step.

1.2.2 Bulk add users with a .CSV file.

To begin with, please ensure you have a correctly formatted CSV (comma separated value) file. A blank one can be downloaded from the wizard at the first step which you can populate with data. As with creating the users individually, you must enter the username, which must be in the format of the main email address, and display name. All other information is optional. Also please note that you must save the file as a CSV (comma delimited) file type.

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](#)

Path and file name:

[Download a blank CSV file](#)

Create a new CSV file from this template using a text editor, such as Notepad.

[Download a sample CSV file](#)

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.

Clicking next will show the results of the import. If any errors do occur, you can view the log file to ascertain why. Most commonly, if you notice in the log that all the information has been put into the "User name" column, the file was not saved as a CSV.

Review your results. To resolve the errors, view the verification log, correct the errors in your CSV file, and try again.

	RESULTS	QUANTITY
	Users that passed verification:	4
	Errors:	1

Log file: [View](#)

In the failed example below you can see that the mandatory field username is blank for one of the users:

Verification results: 4 users passed verification

We recommend that you print this page or save it as a text file.

* Required fields

Verification	User name*	First name	Last name	Display name*	Job title	Department
Verified	Barry.Branson@	Barry	Branson	Barry Branson	Analyst	Information Distribution
Verified	Carly.Cathson@	Carly	Cathson	Carly Cathson	Team Leader	Information Distribution
Verified	Daniel.Davidson@	Daniel	Davidson	Daniel Davidson	Engineer	Systems Integration
Verified	Emily.Etheridge@	Emily	Etheridge	Emily Etheridge	Team Leader	Systems Integration
One or more required fields are missing. Check the CSV file and try again.		Frank	Foster	Frank Foster	Engineer	Systems Integration

On the next screen, you can select if all imported users will start enabled or disabled (able to access the sign on or not) and a location for them. Please note that the location must be filled correctly, generally as their primary office location.

On the fourth screen you may assign licenses and manually enable/disable individual features for the plan. Manually removing a feature does not all you to assign this part of the plan to another user.

Finally you may opt to send a welcome email with credentials to an email address. Alternatively you can manually record the credentials from the next screen.

Finally, you can choose to email the user credentials (all formatted into one email) to another address. Default this will be the current login account though unless already amended, admin@ will not defaultly have a mailbox associated with it. If you do not send the credentials to an address, please make a separate note of the default password.

Note: a user must log into the Office 365 portal (<https://portal.microsoftonline.com>) and change the default password before they can set their account up in Outlook or a mobile device.

If you wish to add an administrative role to a user you have imported as part of a CSV import, you must select them from the user list and edit their details.

1.3 Set the domain purpose and configure DNS

From the admin login portal (<https://portal.microsoftonline.com>), select “setup” from the left-hand menu to bring up the current setup plan. Select **Set the domain purpose and configure DNS** to continue.

First, select the services you wish to use for the domain and click next. Please be aware that you cannot use a domain for SharePoint and for any other service as this option refers to public web hosting not site collections. If all three services are required, please use a subdomain (e.g. www.mydomain.com) for SharePoint. Click **done, go check** to continue.

Note: the highlighting red MX record does not need to be added to your DNS record as the DNS information should use Symantec.cloud (see phase 7 for further information), however all other records should be followed. For this reason it is not possible to complete the domain setup. It is recommended that instead the wizard is left at this stage by clicking **Cancel** or **Close, return later**.

Exchange Online

TYPE	PRIORITY	HOST NAME	POINTS TO ADDRESS	TTL
MX	0	@	.mail.protection.outlook.com	1 Hour
CNAME	-	autodiscover	autodiscover.outlook.com	1 Hour

Do not add this MX record to your domain.
Notify support@inty.com when ready to deliver your mail to Office 365

TYPE	TXT NAME	TXT VALUE	TTL
TXT	@	v=spf1 include:spf.protection.outlook.com -all	1 Hour

Lync Online

TYPE	SERVICE	PROTOCOL	PORT	WEIGHT	PRIORITY	TTL	NAME	TARGET
SRV	_sip	_tls	443	1	100	1 Hour		sipdir.online.lync.com
SRV	_sipfederationtls	_tcp	5061	1	100	1 Hour		sipfed.online.lync.com

TYPE	HOST NAME	POINTS TO ADDRESS	TTL
CNAME	sip.	sipdir.online.lync.com	1 Hour
CNAME	lyncdiscover.	webdir.online.lync.com	1 Hour

Once your Office 365 DNS records have been added, please request that your Symantec.cloud destination address be updated to send mail only to Office 365.

Note: when your MX records are updated, the following points must be considered:

- Any user who has not reconfigured their client (mobile device or PC) will not receive new mail.
- Any user/group/contact/address which has not been created in Office 365 will reject email sent to it.

1.4 Import user data (Optional)

To import data from an existing email system please refer to the import user step of the Office 365 online plan. To access this information log into the portal (<https://portal.microsoftonline.com>) and select "setup" from the left-hand menu. Next, select **Import user data** to continue.

1.5 Start using your services

Once your domain is added and configured and the user accounts have been created, you will be able to use this for your services. For further information click the **Start using your services section** of the setup plan. This page will list a number of information resources which can be used to aid in enabling users to connect to the new service:

Start using your services

Manage services

After completing setup, go to **Admin > Office 365 > Service settings** to manage your services. If you want to use another domain with Office 365, go to **Admin > Office 365 > Domains**.

Get started with software

[Learn more](#) about installing software like Office or Lync.

Set up users' desktops

Make a plan to set up your users' **PC** and **Mac** desktop computers. This includes ensuring that their computers meet the software requirements, and deciding whether your users will do their own installation or if you want to manually deploy **Office 365**.

Set up phones and tablets

Mobile access is set up by default, but you'll still need to decide how you want to [manage your users' phones and tablets](#), depending on the types of devices you support in your organization.

Inform your users

Send instructions to explain what to expect. Make sure to include the following information:

- Their user ID and temporary password
- The URL to access the Office 365 portal: <https://portal.microsoftonline.com>
- A link to [Get started with Office 365](#), which includes instructions for the common tasks that users need to do first
- Steps for [connecting their mobile phones or tablets to Office 365](#)
- Information about who to contact for help

You may wish to add additional domains (refer to the deployment plan) or user aliases (refer to the Exchange Online guide) or re-run setup for another domain and follow the steps above. If you wish to modify the domain which the setup is run for please click the [change domain](#) link at the top of the page.