

Client New M365 User Account

1. Preliminary Information

Per Client CTO, new user requests may come from Human Resources or the Tech and Data team.



NEED BY 11/19/2021 New Employee Computer Database Setup Request -- Megan

Created 11/16/2021 10:27 AM (22d 7h 57m ago) - Carmen

DESCRIPTION

Hello!

Please see attached the request for access for Megan who is **starting Monday 11/29/2021**. Megan will need full user access and access to Salesforce access.

Feel free to contact me with any questions!

Best wishes,
Carmen

- BACKGROUND QUESTIONS -

Q: Microsoft product question. Which version.

A: [no answer]

Q: Operating system question. Which version.

A: [no answer]

Q: Can you repeat the failure?

A: [no answer]

Q: Error message or error #

A: [no answer]

1.1. New User request

The new user request will include (see above screenshot):

- A. The *need by date* **and** the user's official *start date* in the title and body of the request
NOTE: *need by date* and *start date* are usually not the same date
- B. An Excel attachment with new user information
 - *Groups* are Distribution Lists

- *Drives* are Sharepoint sites

Groups and Drives, per the Excel spreadsheet:

Email Groups and Drive access					
Group 1	Group 2	Group 3	Fundraising Drive	Accounting Drive	HR Drive
Success		▼	No	No	No

Groups are based on user's *Office* and *Position*:

Office	First Name	Last Name
Jamaica Plain	Megan	

Position	New/Replacement
College Success Advisor	Replacement

1.2 Groups (Distribution Lists)

A. *Office*

- National – *NationalOffice*
- Chicago – *ChicagoOffice*
- Dorchester – *DorchesterOffice*
- Jamaica Plain – *BostonOffice*
- New York – *NYOffice*

B. *Position*

- Success - e.g. *BostonSuccess, ChicagoSuccess, NYSuccess, etc*
- Access - e.g. *BostonAccess, ChicagoAccess, NYAccess, etc*
- Career - e.g. *CareerNYUsers*
- Accounting - e.g. *AccountingUsers*
- Development - e.g. *DevelopmentAll, DevelopmentCHI, DevelopmentNY, DevelopmentMA, etc*
- Human Resources - e.g. *HR, HRUsers, HR Drive*

NOTE: Add user to the group(s) below if they are a Program Lead or Manager:

- Program Leads - e.g. *CHIProgramLeads, MAProgramLeads, NYProgramLeads, etc*
- Managers - e.g. *ProgramManagers, CHISuccessManagers, NYSuccessManagers, MASuccessManagers, etc*

1.3 Drives (Sharepoint sites)

NOTE: Sharepoint permissions are managed from *Teams admin center*.
Permissions replicate to Sharepoint sites.

1. Accounting Drive is the **Finance** Sharepoint site.
2. HR Drive is the **HR** Sharepoint site.
3. Fundraising Drive is the **BLDevelopment** Sharepoint site.

2. User Setup Instructions

Be sure to reference both the ticket and Excel spreadsheet when creating the user account

2.1. Microsoft 365

1. Open a browser and navigate to portal.office.com
2. Login with 365 admin credentials (in Passportal)

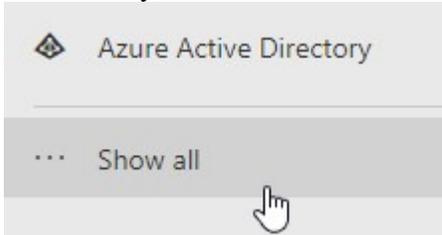


For help, please email help@bottomline.com

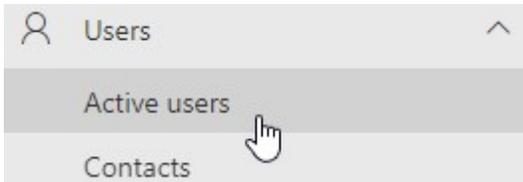
3. Click **Admin**



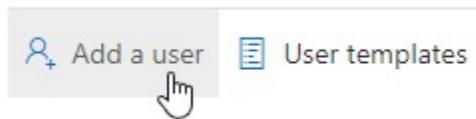
4. If necessary, click **Show all**



5. Click **Users** → **Active Users**



6. Click **Add a user**



7. Fill in user information, per the screenshot below.

Set up the basics

To get started, fill out some basic information about who you're adding as a user.

First name	Last name
<input type="text" value="Megan"/>	<input type="text" value=""/>
Display name *	
<input type="text" value="Megan"/>	
Username *	Domains
<input type="text" value="megan@"/>	<input type="text" value=""/>
<input checked="" type="checkbox"/> Automatically create a password	
<input type="checkbox"/> Require this user to change their password when they first sign in	
<input checked="" type="checkbox"/> Send password in email upon completion	
Email the new password to the following recipients *	
<input type="text" value="megan@contoso.com"/>	

8. Click **Next**

9. Add licenses per the screenshot below. **E2 is required** in order to create user's Exchange mailbox

Assign user a product license

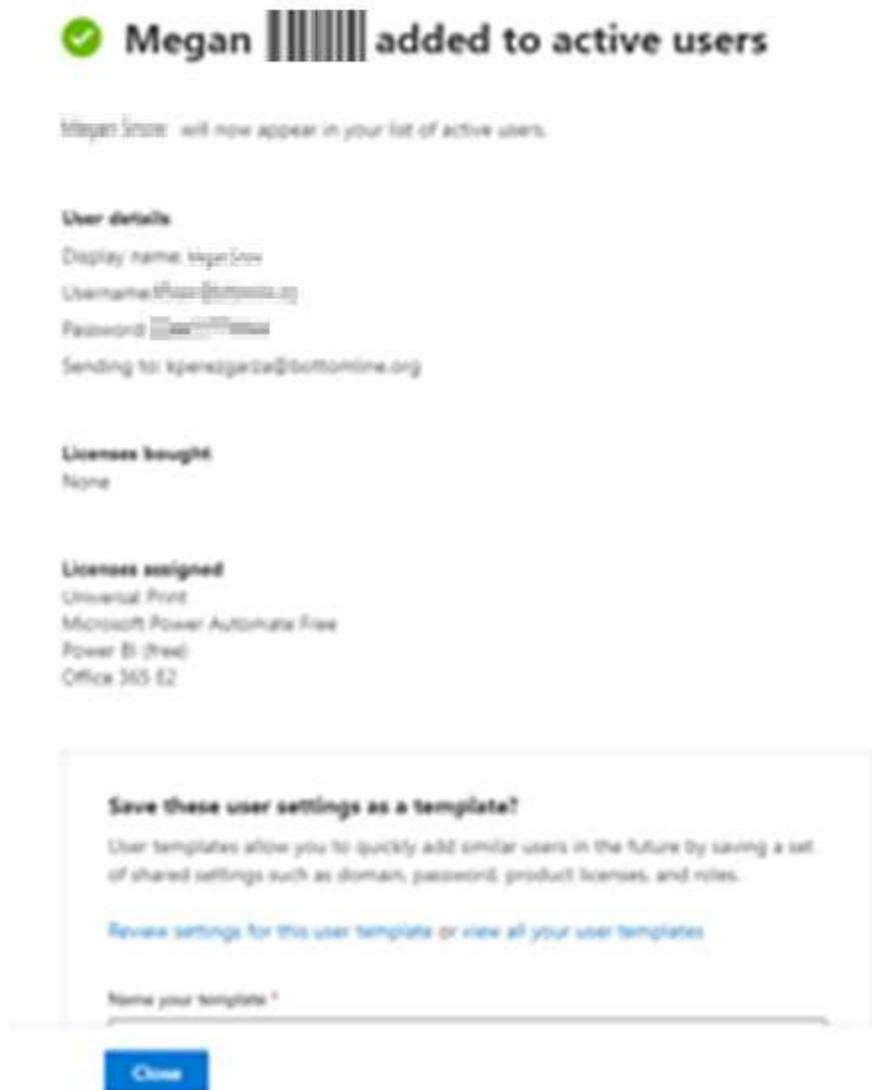
- Enterprise Mobility + Security E3
You don't have any licenses available. To purchase additional licenses, please contact your partner(s).
- Microsoft 365 Business Premium
2 of 161 licenses available
- Microsoft Power Automate Free
9960 of 10000 licenses available
- Microsoft Stream Trial
Unlimited licenses available
- Office 365 E2
100 of 500 licenses available
- Power BI (free)
Unlimited licenses available
- Power BI Pro
6 of 10 licenses available
- Universal Print
299938 of 300000 licenses available

10. Click **Next**

11. Click **Next**

12. At the *Review and finish* page, verify all information is correct and click **Finish adding**

13. Verify the user was added and click **Close**



The screenshot shows a confirmation message for adding a user named Megan. At the top, there is a green checkmark icon followed by the text "Megan [barcode] added to active users". Below this, a message states "Megan [barcode] will now appear in your list of active users." The screen is divided into three sections: "User details" showing "Display name: Megan [barcode]", "Username: [barcode]@bottomline.org", "Password: [masked]", and "Sending to: kperetz@bottomline.org"; "Licenses bought" showing "None"; and "Licenses assigned" showing "Universal Print", "Microsoft Power Automate Free", "Power BI (Free)", and "Office 365 E2". At the bottom, there is a box titled "Save these user settings as a template?" with a description of user templates and a link to "Review settings for this user template or view all your user templates". Below this is a text input field labeled "Name your template *" and a blue "Close" button.

14. From the **Active users** page, search for the new



The screenshot shows the top toolbar of the Active users page. It contains several icons and labels: a person icon with a minus sign for "Delete a user", a circular arrow for "Refresh", a key icon for "Reset password", a download icon for "Export users", a three-dot menu icon, and a funnel icon for "Filter".

15. Click on the user's name to open their profile page

Home > Active users

Active users

Recommended actions (1)

[Add a user](#) [Multi-factor authentication](#) [Refresh](#) [Delete user](#) [Reset password](#) [Manage product licenses](#) [Manage](#)

<input type="checkbox"/>	Display name ↑	Username	Licenses
<input checked="" type="checkbox"/>	Megan S...	[redacted]	Microsoft 365 Business Premium, Office

16. Click **Edit manager**

Alternate email address

None provided

[Add address](#)

Roles

No administrator access

[Manage roles](#)

Groups

All Users

[Manage groups](#)

Manager

[Edit manager](#)

17. Start typing the manager's name. If manager does not appear in the list, use their email address instead. Click the manager's name.

Add, switch, or remove

karla

Results

 Karla Perez Garza
kperezgarza@bottomline

18. Click **Save changes**

19. Scroll down if needed and click **Manage contact information**

Contact information

Display name

Megan Simons

First name

Megan

Phone number

[Manage contact information](#)

Last name

[Redacted]

20. Fill in user profile information, per the Excel spreadsheet (also refer to **Preliminary Information** at the beginning of this document)



Manage contact information

First name

Megan

Last name

██████████

Display name *

Megan ██████████

Job title

██████████ ██████████ ██████████ ██████████

Department

Jamaica Plain

Office

Office phone

Fax number

Mobile phone

██████████ ██████████ ██████████ ██████████



Street address

21. Verify all information is correct and click **Save changes**

22. From the Excel document, scroll to this section

Email Groups and Drive access					
Group 1	Group 2	Group 3	Fundraising Drive	Accounting Drive	HR Drive
Success			No	No	No

23. From the user profile, click **Manage Groups**

Last sign-in
No attempts in last 30 days
[View last 30 days](#)

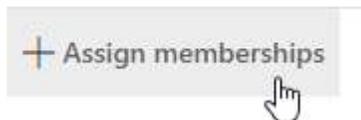
Sign-out ⓘ
Sign this user out of all Office 365 sessions.
[Sign out of all sessions](#)

Alternate email address
None provided
[Add address](#)

Groups
All Users

[Manage groups](#)

24. Click **Assign memberships**
Manage groups



25. All users receive access to the following groups, *unless otherwise specified*:

- All users
- M365 Business Premium License
- Client Name
- Support

NOTE: When searching for groups, enter the group name exactly as it appears (e.g. typing "Business Premium" will not give results for "M365 Business Premium" group. The search will not work unless you type the group name from the beginning.

26. Refer to **Preliminary Information** at the beginning of this document for user-specific groups and add those as well from **Manage groups** → **Assign memberships**.

NOTE: You may receive an error message when attempting to add groups/distribution lists, as

Exchange will still be processing the new user's mailbox and may not have caught up yet. If necessary, wait 5 minutes and attempt to add groups/distribution lists again.

27. Verify all groups were added successfully, then click the back arrow

Back **Manage groups**

It may take up to an hour for distribution lists and mail-enabled security group memberships to display

✓ Saved

+ Assign memberships

<input type="checkbox"/>	Group	Email
<input type="checkbox"/>	All Users	
<input type="checkbox"/>	Regional Group	RegionalGroup@contoso.com
<input type="checkbox"/>	Regional Group	RegionalGroup@contoso.com

28. Close the Edit User page

MS

Megan

Reset password Block sign-in Delete user

Change photo

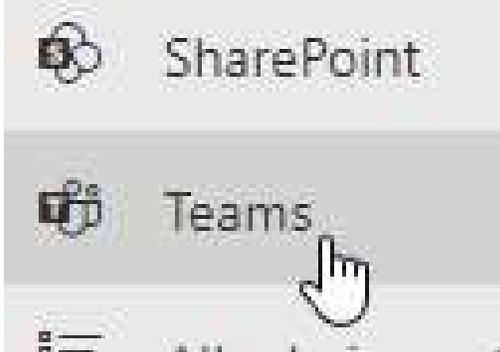
Close

29. Return to the Excel document and verify whether drive access was requested, and for which drives

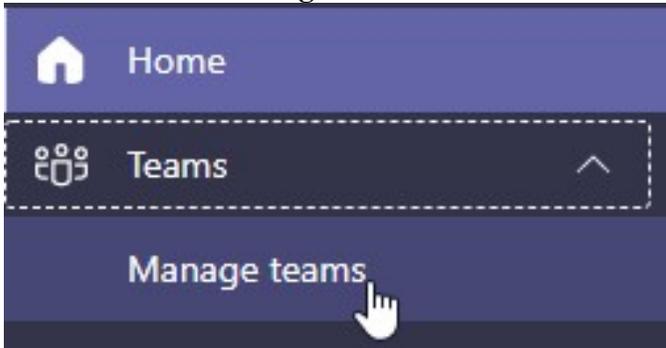
- If drive access was requested, proceed to step 30. Otherwise, close all open windows.

30. Refer to **Preliminary Information** section at the beginning of the document for Sharepoint site links.

31. If necessary, return to M365 Admin Center, then click the **Teams** icon (Teams admin center)



32. Click **Teams** → **Manage teams**



33. Search for the Sharepoint site name (e.g. for Fundraising Drive, search "development")

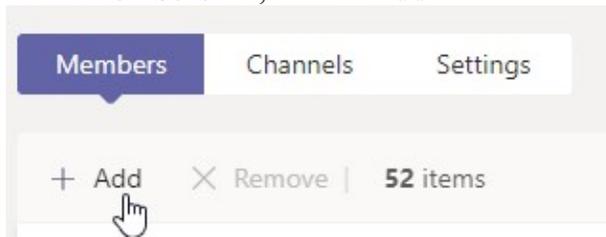


	Name	Standard channels	Private channels	Team members
✓	 Development	17	0	46

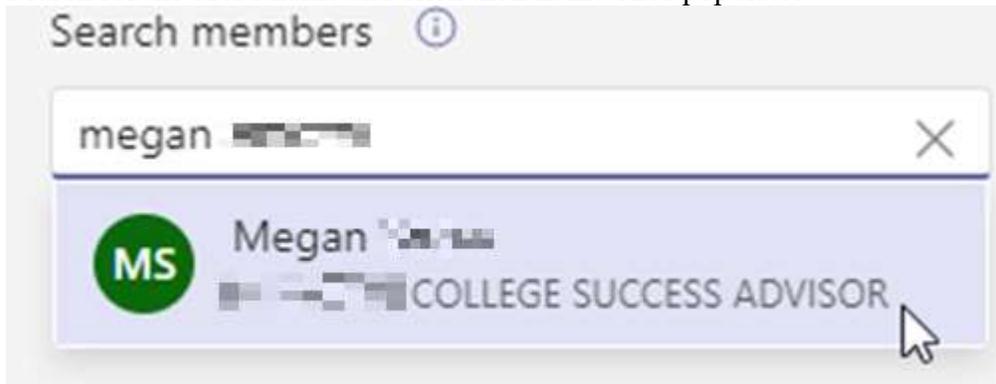
34. Click the Team name



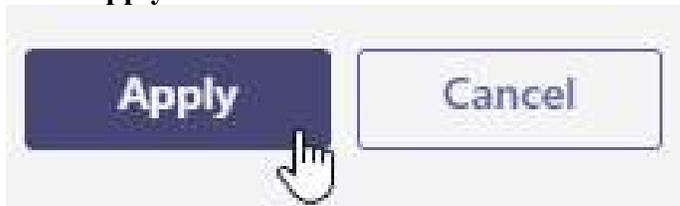
35. From **Members** tab, click + **Add**



36. Search for the user's name and click their name once populated



37. Click **Apply**



38. Repeat steps as needed to add user to additional requested drives

39. Close all open windows