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.

HELPDESK ▾ SERVICE REQUEST
T20211116.0133

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 acces
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.

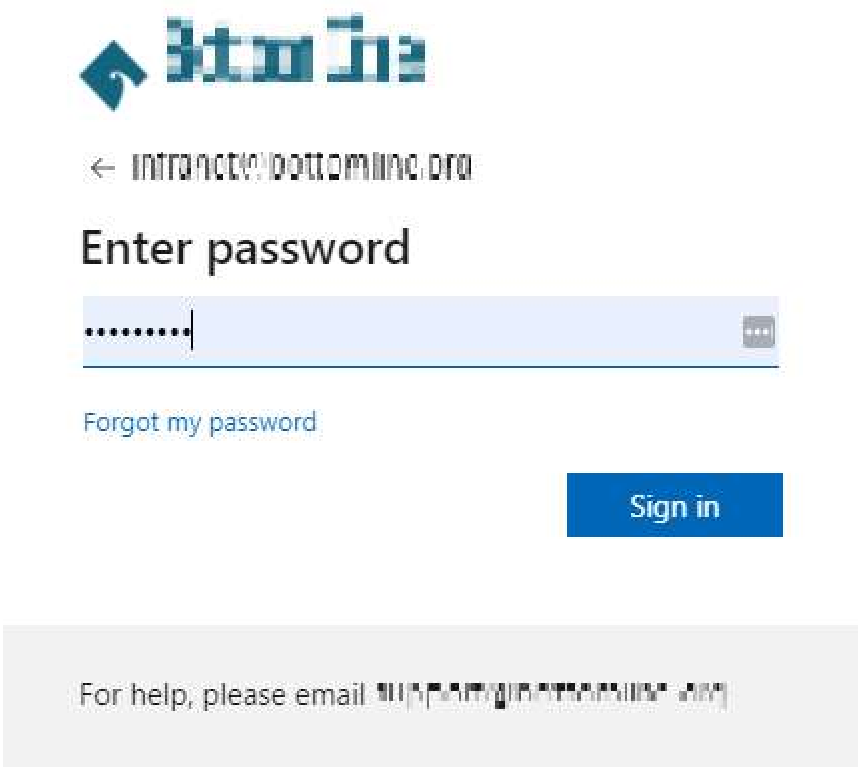
2. User Setup Instructions

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

2.1. Microsoft 365

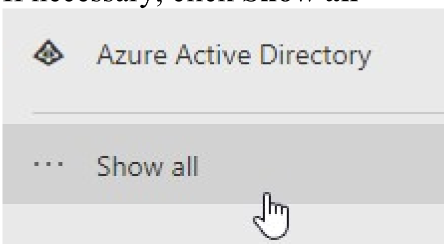
1. Open a browser and navigate to portal.office.com

2. Login with 365 admin credentials (in Passportal)

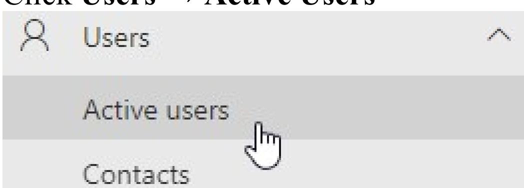


3. Click **Admin**

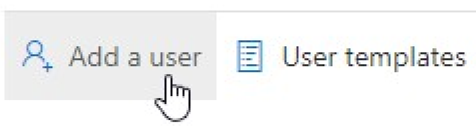
4. If necessary, click **Show all**



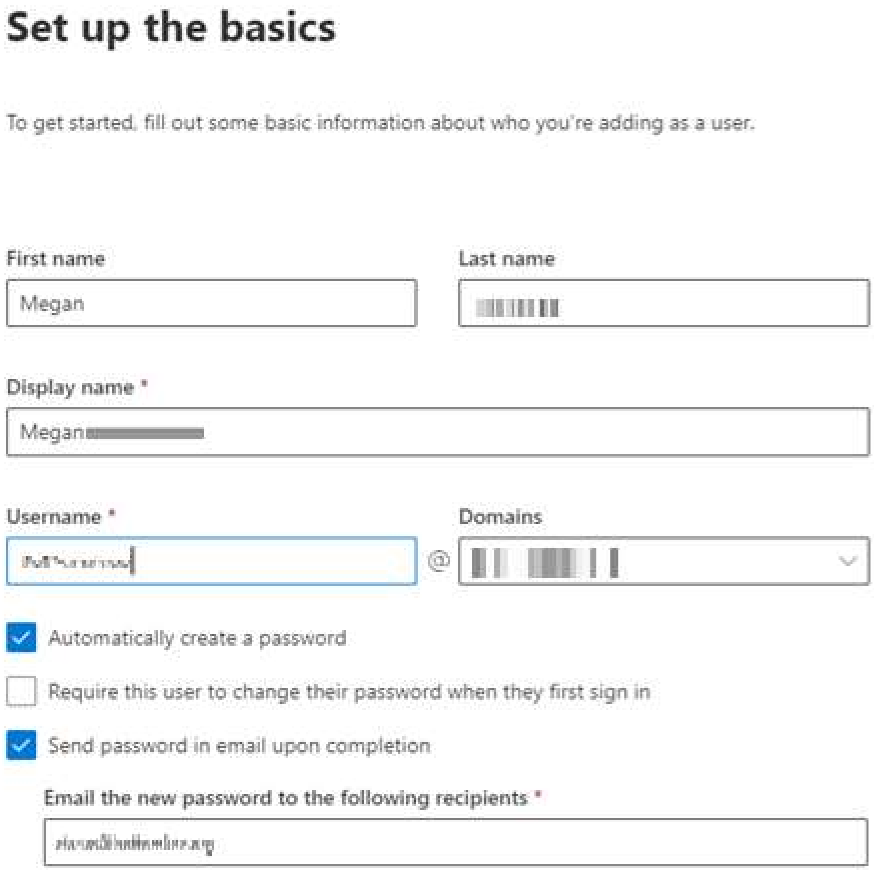
5. Click **Users → Active Users**



6. Click **Add a user**

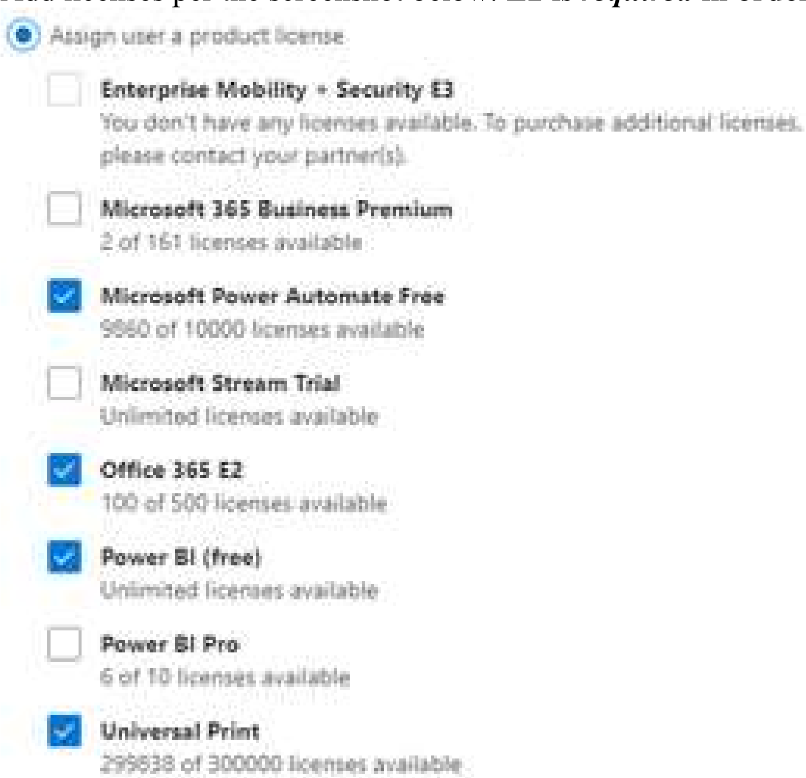


7. Fill in user information, per the screenshot below.



8. Click **Next**

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

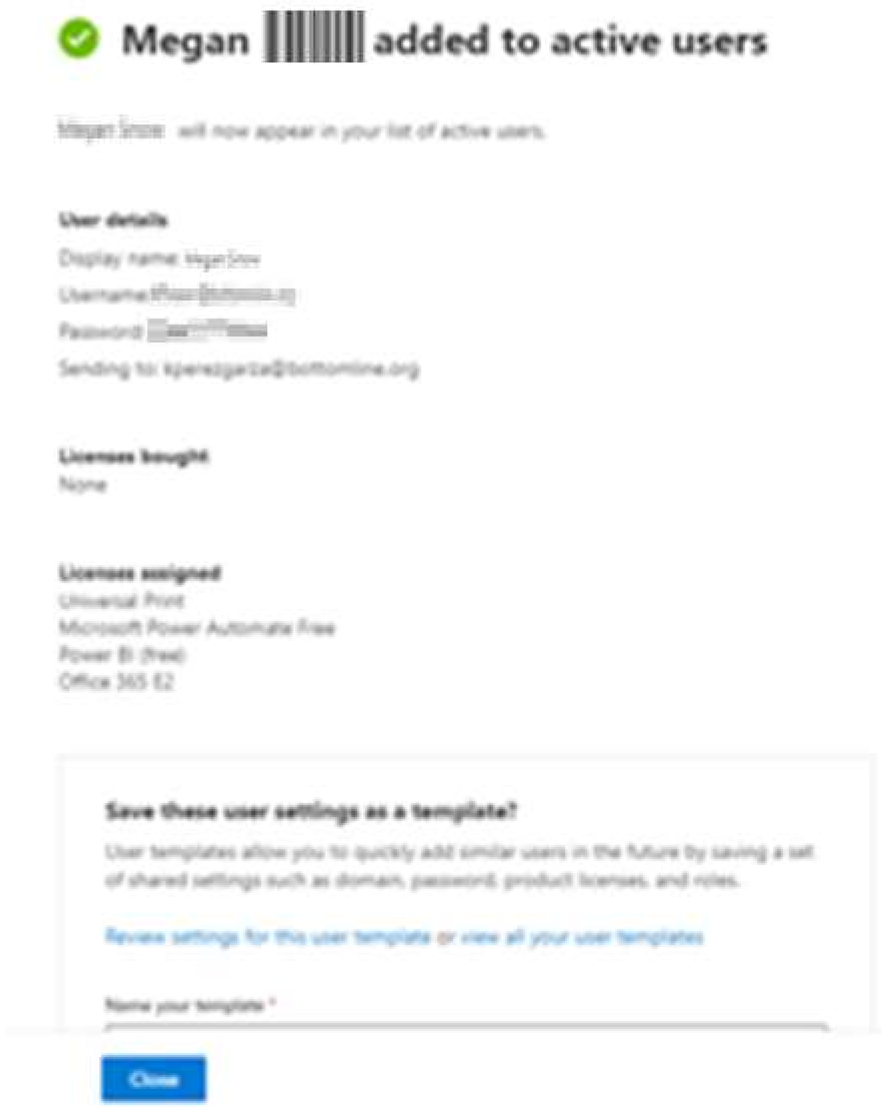


10. Click **Next**

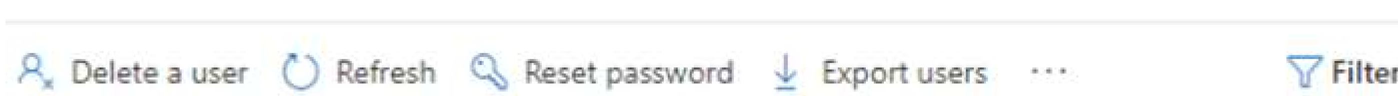
11. Click **Next**

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

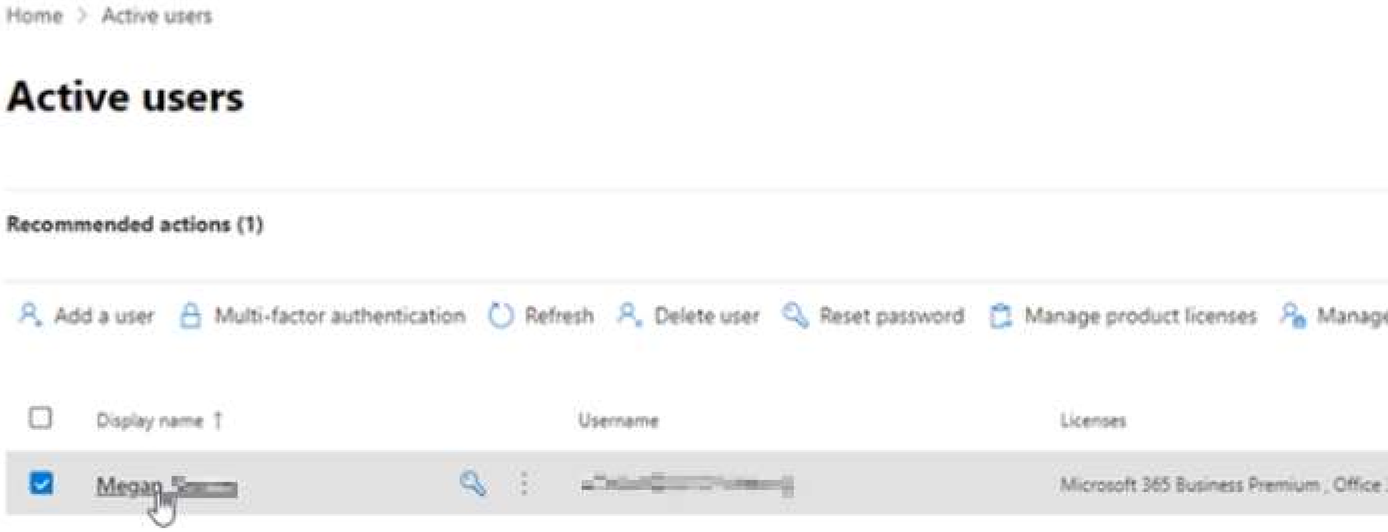
13. Verify the user was added and click **Close**



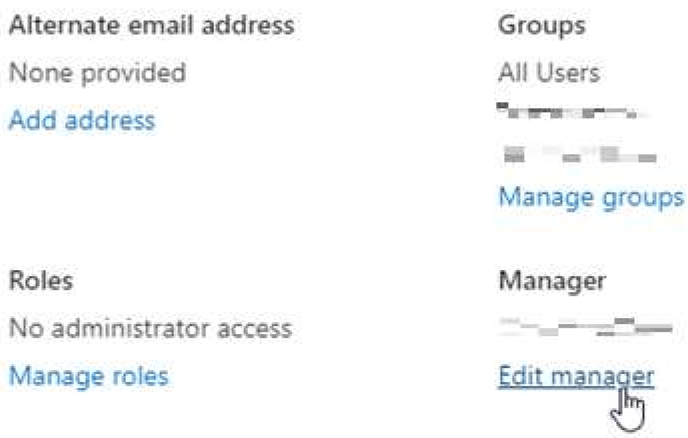
14. From the **Active users** page, sesarch for the new



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



16. Click **Edit manager**

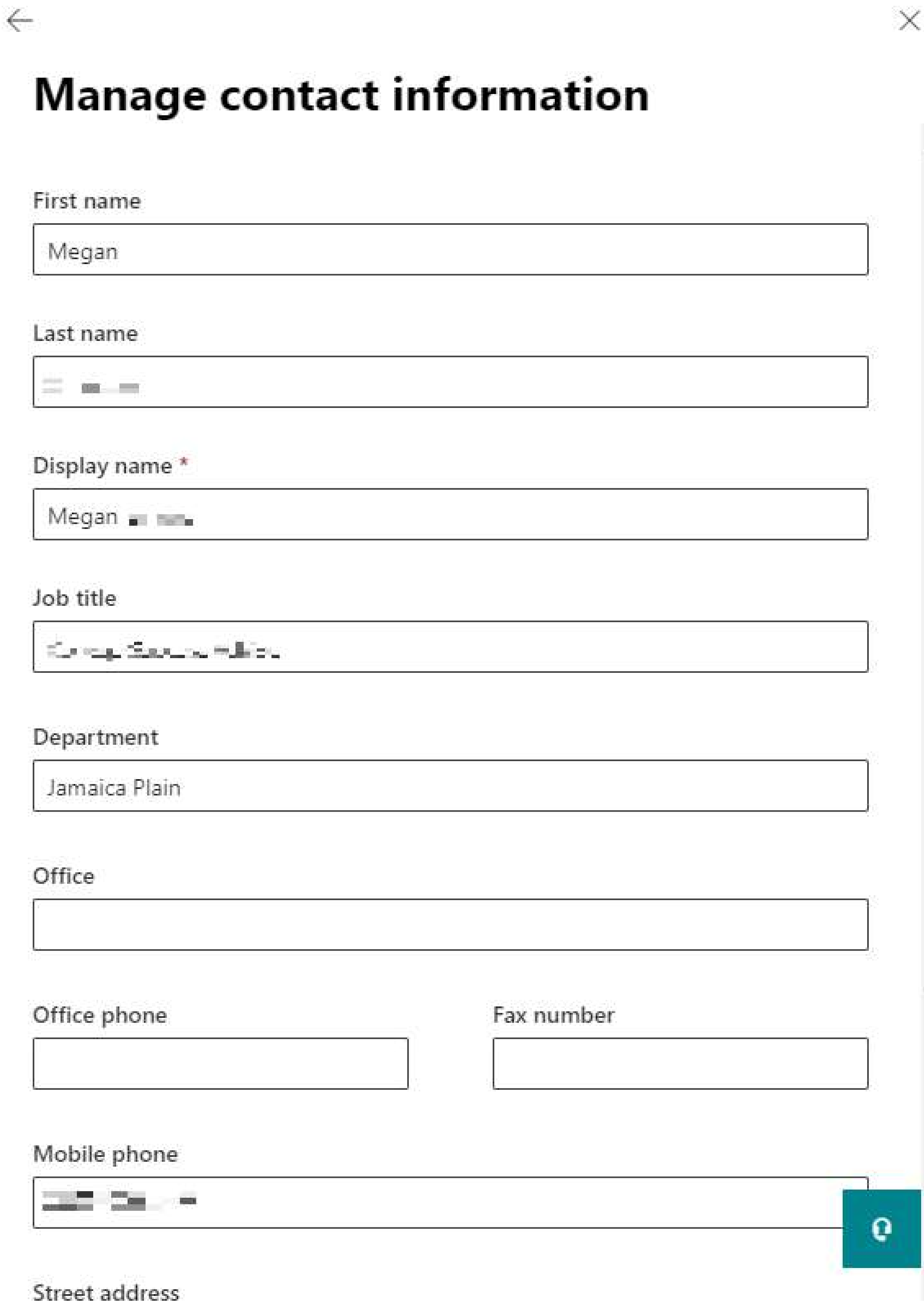


17. Start typing the manager's name. If manager does not appear in the list, use their email address instead. Click the manager's name.

18. Click **Save changes**

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

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

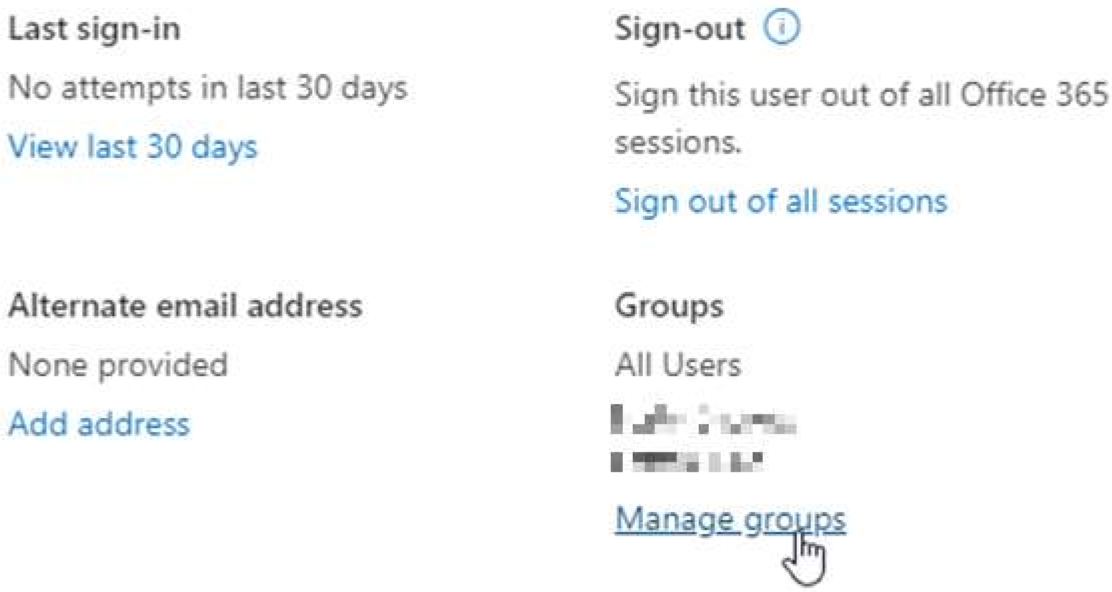


21. Verify all information is correct and click **Save changes**

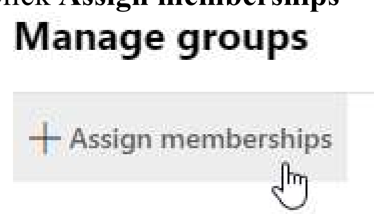
22. From the Excel document, scroll to this section

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**



24. Click **Assign memberships**



25. All users receive access to the following groups, *unless otherwise specified*:
    - All users
    - M365 Business Premium License
    - Client Name
    - Support

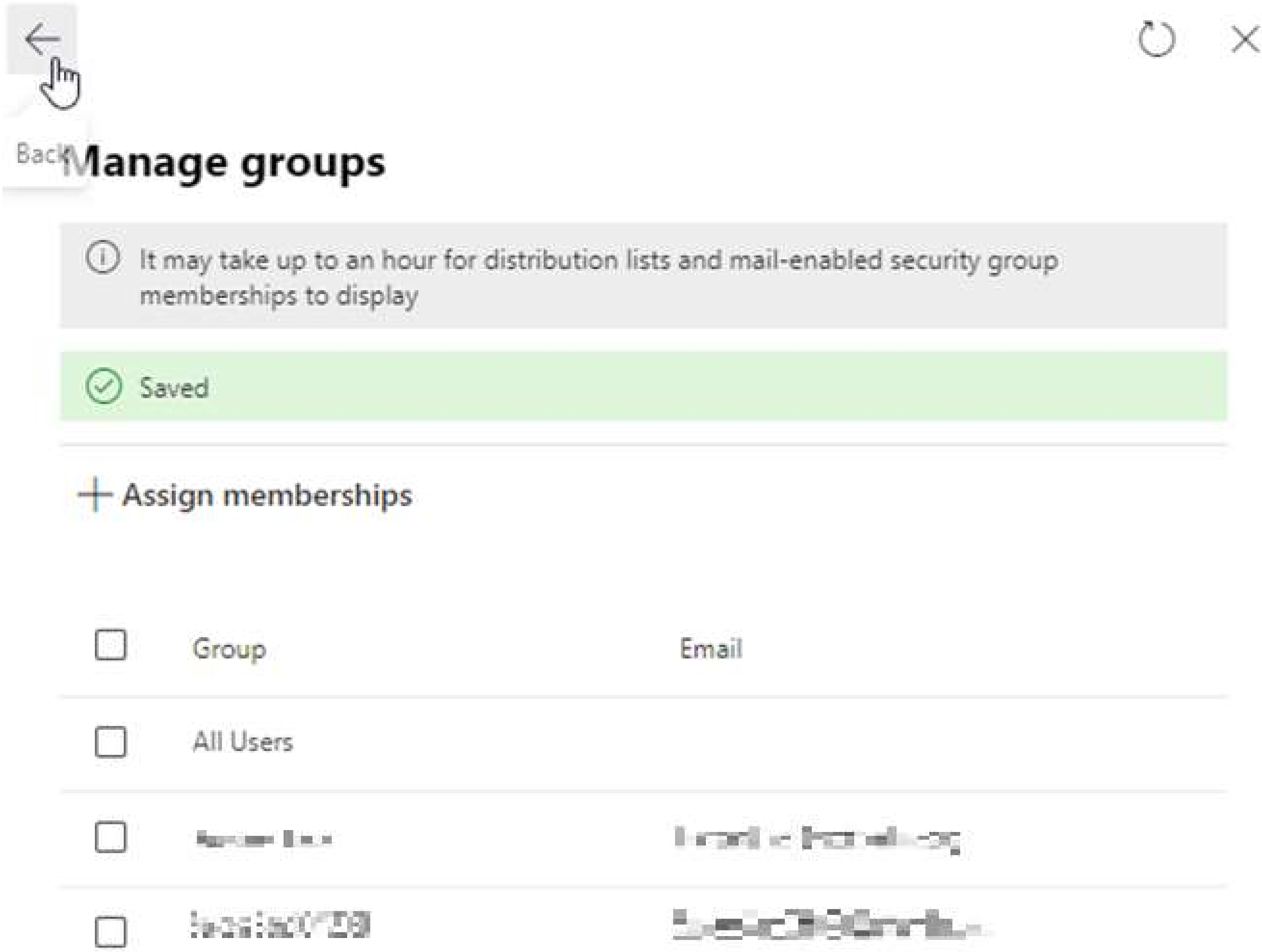
NOTE: When searching for groups, enter the group name exactly as it appears (e.g. typing "Business Premium" will not give results for "M365 Business Premium" group. The search will not work unless you type the group name from the beginning.

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



28. Close the Edit User page

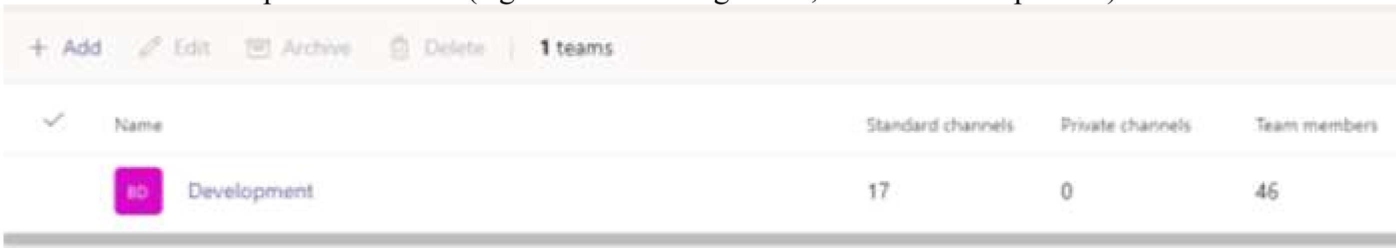
29. Return to the Excel document and verify whether drive access was requested, and for which drives

- 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)

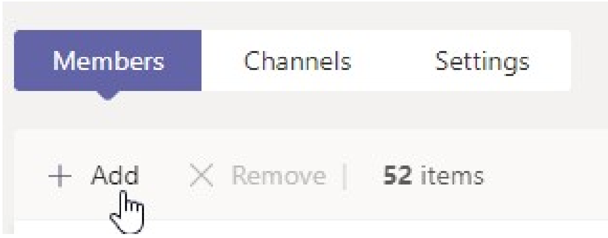
32. Click **Teams → Manage teams**

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

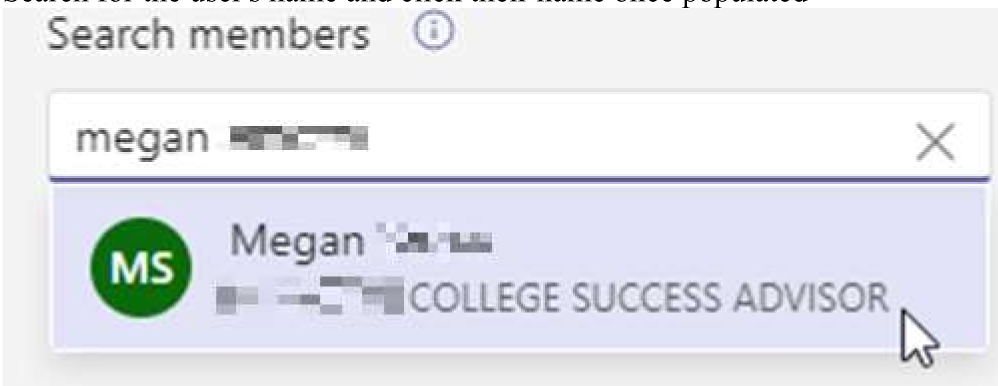


34. Click the Team name

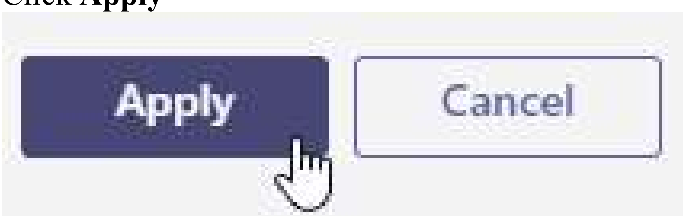
35. From **Members** tab, click **+ Add**



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