RM
Education

Setting up Office 365
1: Tenancy, domain and licences

Introduction

Microsoft Office 365 makes Office available in the cloud, from any computer at any location. This includes the full suite of Office productivity tools, including Outlook email via Exchange Online.

We recommend that you make Office 365 available to your establishment through RM Unify. You can use RM Unify to create your Office 365 users, and RM Unify (Premium) makes it easy to keep these accounts synchronised. Therefore staff and students can access their email and other Office applications from RM Unify without any additional sign-on.

About this article

This article is written for two audiences:

- Network administrators who have chosen one of RM's Office 365 'wrap' services, with or without RM Unify.

- Other network administrators who need to set up Office 365 with RM Unify by themselves.

 It explains:

- how to create an Office 365 Education account ('tenancy') for your establishment

- how to add a custom domain in which your Office 365 users can be created

- how to prove that your establishment qualifies for educational licensing

- how to get the Office 365 educational licences you will need for your staff and students.

This article is a companion to Microsoft's on-screen instructions at

http://www.microsoft.com/education/en-us/products/p/Pages/office.aspx

but note that it does not cover the final steps in Microsoft's Office 365 setup wizard. This is because at the user creation step you may need to switch to RM Unify (see DWN3332757), or you may have chosen another method of provisioning users, e.g. with DirSync, for which you may be using an RM installation service. Also, if you are using one of our Office 365 wrap services, the critical final stage of configuring your Office 365 domain and redirecting email needs to be done in coordination with RM. Basic guidance for configuring the Office 365 domain is given in a companion article, *Setting up Office 365 2: Domain configuration* (see DWN3347391) in the RM Education Knowledge Library).

If you have already created an Office 365 for Education account for your establishment, you may not need the instructions in this article. If you want to use Office 365 with RM Unify, see the *Office 365 with RM Unify Installation and Setup Guid*e (see DWN3332757), for the next steps.

Tenancies in Office 365

When you set up an Office 365 account for your establishment, you are creating a 'tenancy'. As a tenant you work with your own customised data and configuration. More than one domain can be associated with a tenancy.

It may help to think of the tenancy as renting space for a business in an office tower, in contrast to personal accounts which are more like joining a business as an individual.

Requirements

You will be asked to specify an existing public domain which is owned by your establishment, so that Microsoft can verify that you represent an educational establishment. The verification process requires a DNS record to be created, so you must have access to that domain and details of its DNS hosting provider. Choose a domain that you want to use with Office 365.

Finding domain information

If you don't know the DNS hosting provider or the registered owner for your chosen domain, a 'whois' query should help reveal this information. For example, go to easywhois.com and type in the domain name.

The DNS hosting provider is normally the DNS registrar. However it is possible that your DNS hosting has been moved since the domain was registered, in which case you may need to look up the domain server names in a search engine to find out who owns them. You will also need the registered owner's account details, either to access the DNS hosting provider's user console to create a DNS record yourself, or to request the DNS hosting provider to create the record on your behalf.

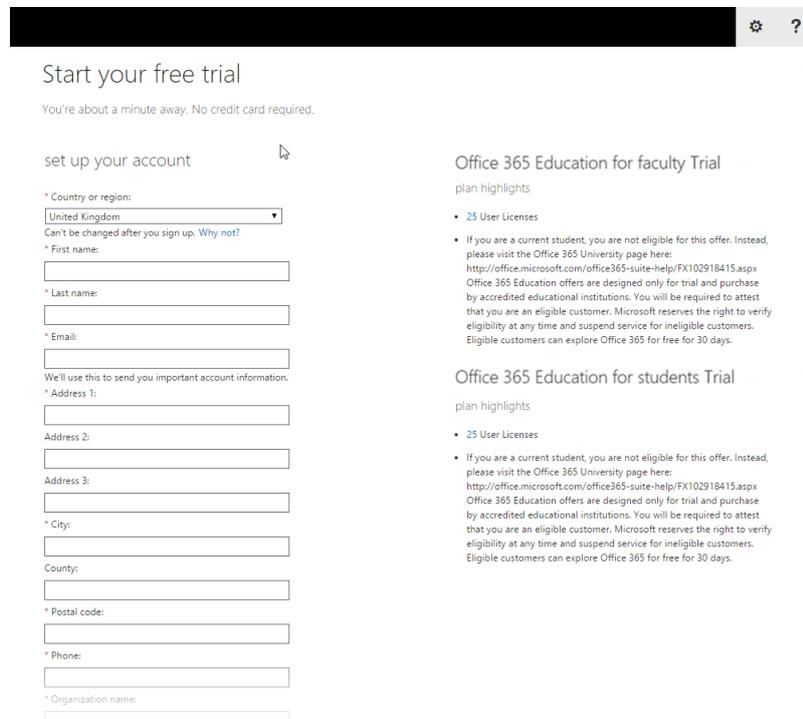# Creating and verifying the account

1. Browse to Microsoft's information page on Office 365 Education.
   At the time of writing this was
   http://products.office.com/en-gb/academic/office-365-education-plan

2. Click the 'Get started' link **t**o start a 30-day free trial. This will be converted into a free Office 365 service when Microsoft has verified your educational status.

3. Enter your details to set up the tenancy account. If you're not sure about what to enter, hover your mouse over the field - in many cases helpful guidance is displayed.

   • Asterisked fields are compulsory.

- Enter a suitable email address that currently works. It will be used for sending you important account information.

- The user ID will create a new email address for your establishment, *@myschoolname*.onmicrosoft.com. It creates a global admin user for the tenancy, *adminusername@myschoolname*.onmicrosoft.com.

Notes:
Take care in selecting the onmicrosoft.com domain name, as you cannot change this later.

The global admin account in your **@myschoolname.onmicrosoft.com** domain should not be deleted, even if admin users are subsequently created in another domain.

4. The next screens prompt you to enter details of a registered domain name for your establishment (see 'Finding domain information' above), to verify that you own it and are eligible for academic pricing.
At the 'welcome' screen click Next.

5. At the 'type a domain name' screen, enter the full name of an existing domain which is owned by your establishment.

Notes:
We recommend that you enter the domain that will be used for email addresses, so that your Office 365 users can be created there.

Note that RM Unify will **not** be able to create users in the *@myschoolname*.onmicrosoft.com domain which is automatically created with your Office 365 account.

Another requirement for RM Unify is that **the domain you choose must have no child domains**.

Additional domains can be added to your Office 365 account later if required.

Click Next.

6. The next screen prompts you to create a verification record at your DNS hosting provider, or ask them to do it for you. The instructions vary depending on your DNS hosting provider. At the 'confirm…' screen, select your DNS hosting provider from the drop-down list to display custom instructions, or choose 'General instructions'.

Important: Microsoft's general instructions state that you can create either a TXT or an MX verification record.
Wherever possible we recommend that you create (or ask your DNS registrar to create) a **TXT record, not an MX record**.
If an MX record is entered incorrectly it could accidentally disrupt your existing email.
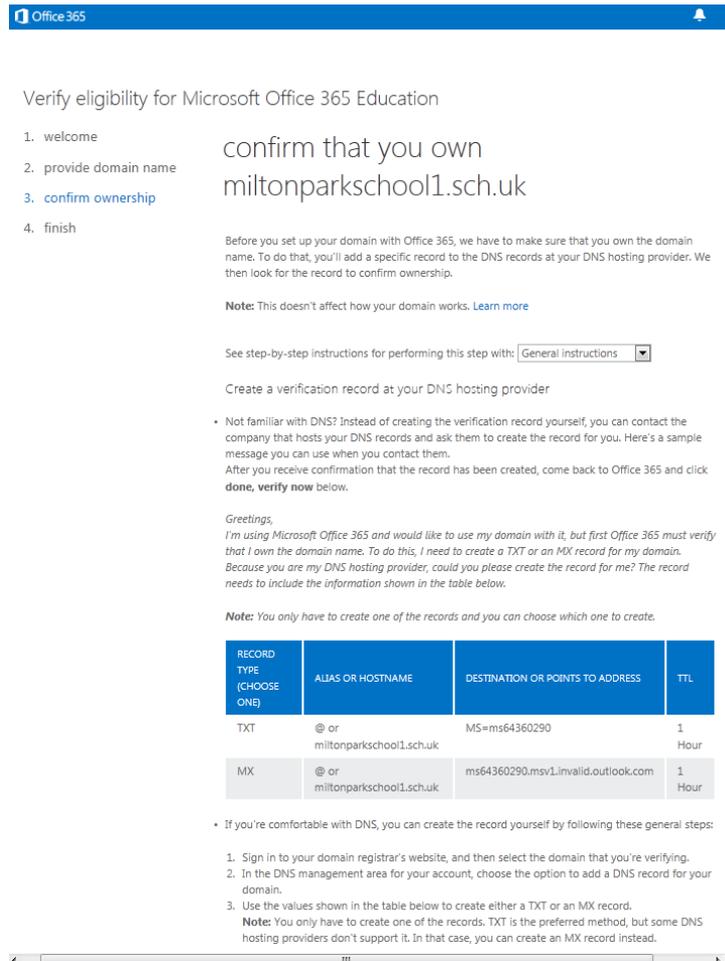
If RM is the DNS hosting provider for the domain, you will need to send us a request to create a TXT verification record, as follows:
From the 'General instructions' screen, copy the sample message including the table, and paste it into a new email message. Check that the 'TXT' row includes the domain name that you need to verify (you don't actually need the 'MX' row). In the Subject line enter 'Request to create a DNS record for Office 365', and email the message to iflchange@rm.com. You will receive a reply to confirm that the requested change has been made.

7. You will probably need to close the Office 365 console while waiting for the DNS verification record to be created, as DNS changes can take up to 72 hours to be replicated. If so, choose the 'I'll verify later' option. To return later, log in to Office 365, and on the Admin tab choose ''domains' and then click the Status entry for the domain you want to verify.

8. When the DNS verification record has been created, click 'done, verify now'.

   This starts two processes:

   • To verify that you own the domain

   • To approve your account for academic pricing.

You will now have some time to wait.

If you need to add another domain (see 'Adding further domains' on page 11), you can do so now.

If you will be using Office 365 with RM Unify and have not yet set up your RM Unify account and users, you should do that now. Be careful about creating Office 365 users manually if you will also be provisioning users via RM Unify or by another method: existing accounts will be lost if they have the same name as an imported user. Bear in mind that user management becomes more complicated if accounts are provisioned through multiple routes.

Waiting for verification

Microsoft will inform you by email when your domain ownership has been successfully verified (this may take up to 72 hours) and when your establishment has been approved for educational pricing (allow 2 to 5 working days).
You can also check the status of the domain as follows:

i. Log on to Office 365.

ii. On the Admin tab, in the left-hand pane choose 'domains'.
    Your domains are listed in the main pane. If the Status of your domain is not yet 'Active', click the status entry to check how far it has progressed (but note 'Don't configure your domain too soon' below).
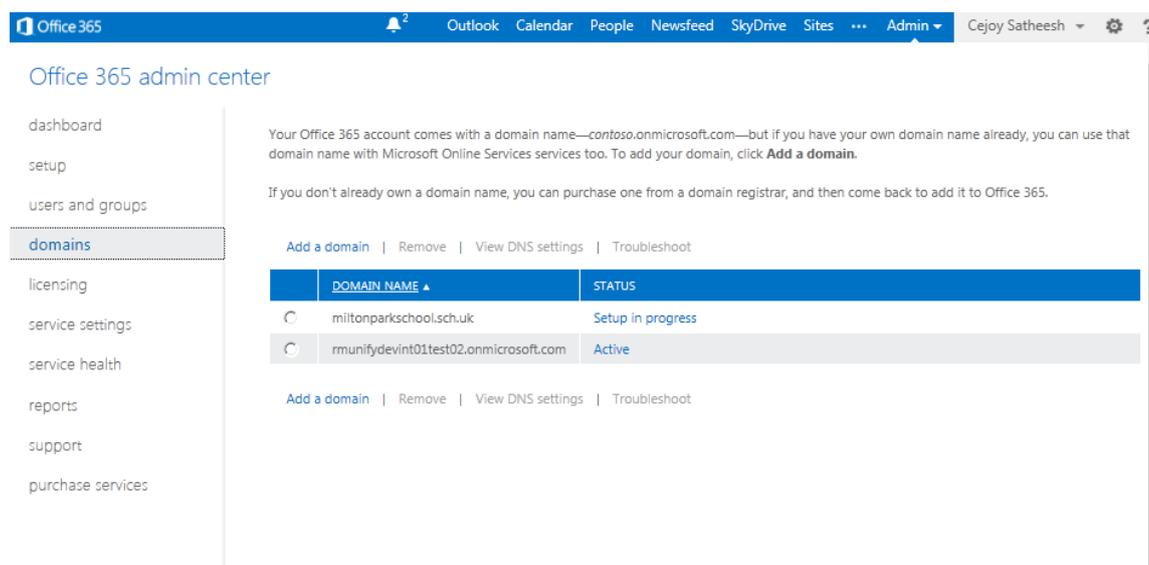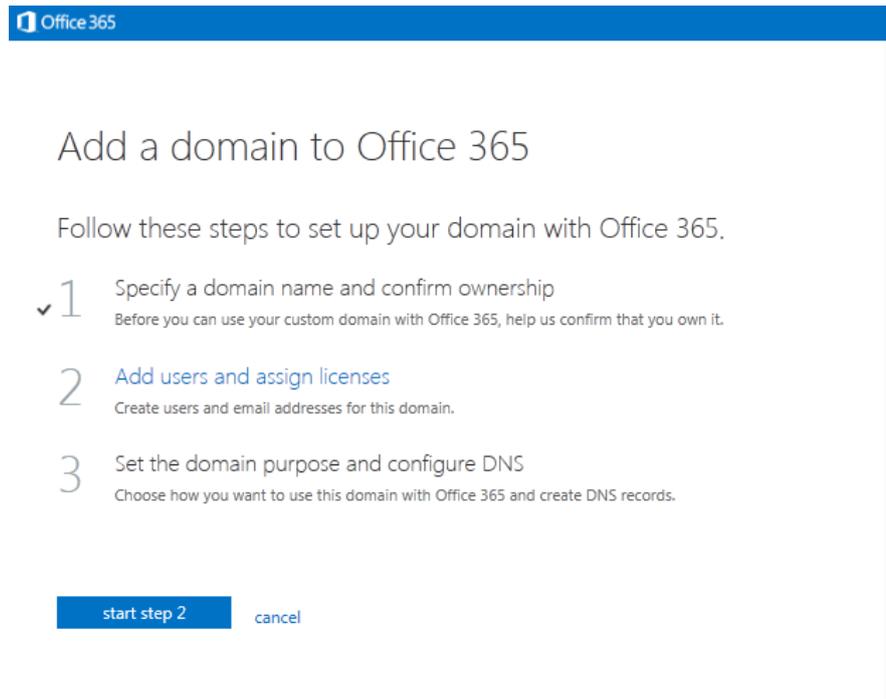

While you are waiting for verification, other features of Office 365 are functional and you can try them out. For example, you can create documents in your personal SkyDrive area. Microsoft provides useful introductory guides at office.microsoft.com.

Successful verification will automatically convert your trial licence into a free Office 365 service, making it possible to select free education licences for your staff and student users.

Don't configure your domain too soon

When your domain has been verified, it will need to be configured before you can use it. To configure it you will eventually need to complete the 'Add a domain to Office 365' wizard, which will be displayed when you click the Status entry for the domain (see screenshot above). It is important not to do this before you are completely ready.

At this point the wizard will have advanced to step 2, 'Add users and assign licenses':

Don't click 'start step 2' at this point. Instead we recommend that you leave the wizard and follow the 'Getting Office 365 licences for staff and student users' instructions on page 8.

(You need to be careful when following the 'Add a domain to Office 365' wizard. Normally its end point will include DNS configuration that redirects existing email for new Office 365 user accounts. You must add all your users before you configure DNS settings that will redirect their email.)

Important: Please take care not to make DNS changes that will redirect your email until you are completely ready to do so, as this can result in service disruption and the permanent loss of email. RM Education wrap services include migrating email and coordinating mail redirection to ensure a safe transition.

Troubleshooting domain verification

If you experience issues in verifying your domain with Office 365, please refer Microsoft's article *Troubleshoot domain verification issues in Office 365* (http://support.microsoft.com/kb/2515404).

Adding Office 365 licences for staff and student users

Before getting your staff and student licences, ensure your Office 365 account has been verified for educational pricing. Business licences are far more expensive!

Your Office 365 service allows you to add an unlimited number of free 'E1' staff and student educational licences, which you can use for your Office 365 users provisioned from RM Unify. You should get the required licences before linking your chosen domain to RM Unify.

Important If you are migrating your email, or otherwise require an Exchange mailbox for your users, make sure you choose a licensing plan that includes Exchange. If you choose an unsuitable plan now, any necessary licensing changes will need to be made manually for each user.

If you are using free user licences, to avoid running out of them you should get more than the number of staff and students in your establishment. We recommend that you add enough extra student licences to ensure you can register the new year's incoming students before deleting the outgoing students. As a guideline, a surplus of about 20% should be enough, with a similar margin for staff licences.

To add educational staff and student licences for the chosen domain:

1. Log on to Office 365.

2. On the Admin tab, in the left-hand pane choose 'purchase services'. You will 'purchase' the licences, even if they are free.

3. In the right-hand pane, find the licence type you want for your staff ('Office 365 Education for faculty' licences are free; premium licences offer more features) and click Add (or 'Add more' if you already have licences of this type).
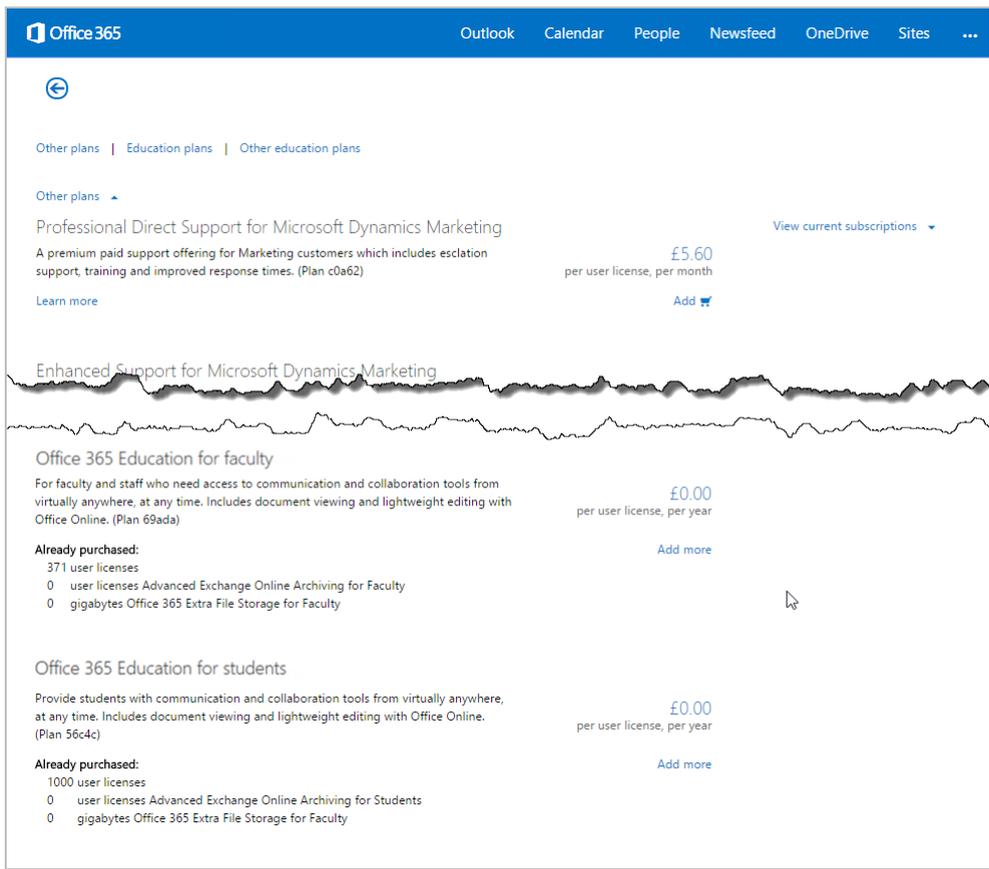
4. Enter the required number of staff licences for your establishment (see Note above) and click 'add licences'. Check the details and click 'place order' and then 'finish'.
(If you are purchasing premium licences, you will be directed to a checkout and payment process instead.)

5. Repeat steps 3–4 to add the student licences you need (see Note above; 'Office 365 Education for students' licences are free; premium licences offer more features).

What to do next

The next task is to create your Office 365 users. There are various ways to do this:

RM Unify
For the next steps in making Office 365 available to your establishment through RM Unify, see the *Office 365 with RM Unify Installation and Setup Guide*, available from article DWN3332757 in the RM Education Knowledge Library.

DirSync (or DirSync with ADFS)
If you have purchased an RM service to provision your Office 365 users via DirSync, please contact your order coordinator to arrange this. To fulfil your Office 365 wrap service, RM will gather the necessary information about your network, advise you when to complete your domain configuration, and perform any required mail migration.

CSV import to Office 365
It is also possible to create and maintain Office 365 user accounts by importing users from CSV files. Microsoft provides instructions and help for importing users and completing the domain configuration. You can access these from your Office 365 account.

Adding further domains

In many cases the domain that you added when setting up your Office 365 account will meet all your requirements. However if you need to add an additional domain for email, instant messaging and/or SharePoint to Office 365, do as follows:

1. Log on to the Office 365 account for your establishment.
2. On the Admin tab, in the left-hand pane choose 'domains'.
3. In the right-hand pane, click 'Add a domain'.

    An 'Add a domain…' wizard is displayed. Click 'start step 1'.
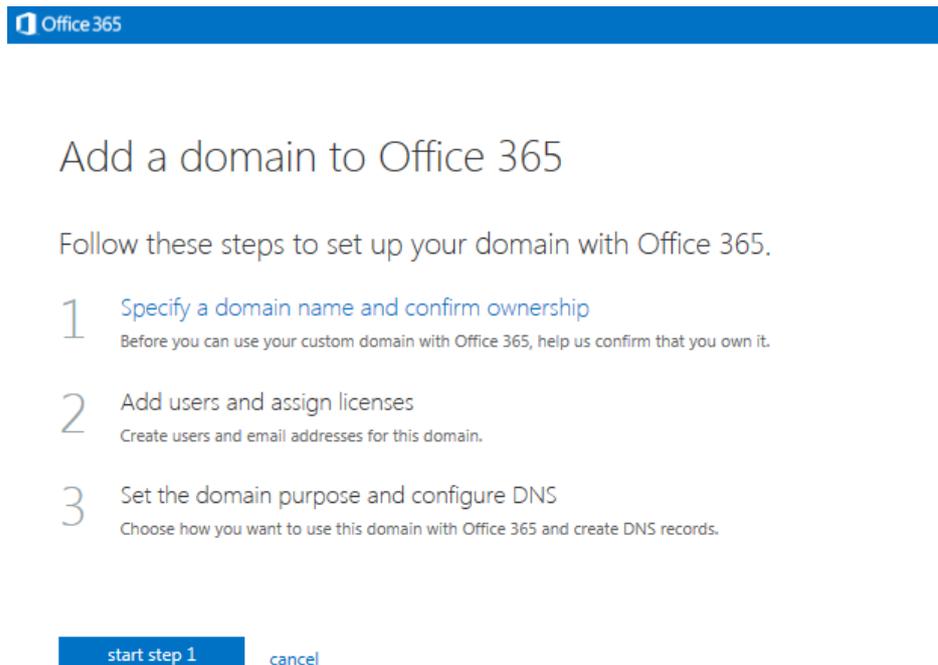
The procedure is very similar to 'Creating and verifying the account' (page 3) and 'Waiting for verification' (page 6), although your eligibility for educational licences will not need to be verified again.

Important: Please take care not to make DNS changes that will redirect your email until you are completely ready to do so, as this can result in service disruption and the permanent loss of email. If you have purchased an RM Office 365 wrap service, this includes coordinating the DNS configuration with you to ensure a safe transition, and migrating your email.