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Western Cape Government

STANDARD OPERATING PROCEDURE

PROJECT: MICROSOFT OFFICE 365 TENANT CREATION

DOCUMENT PROPERTIES

Title	Standard Operating Procedures: Creation of MS O365 own tenants
Project Name	Standard Operating Procedures for the creation of MS O365 own tenants
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Date Created	24-02-2022

REVISION HISTORY

Date	Version	Status	Summary of changes	Author
24-02-2022	0.1	Draft	1st Draft	Willie-John Booysen
10-03-2022	0.2	Draft	2nd Draft	Willie-John Booysen
18-04-2022	0.3	Draft	Final Revision	Willie-John Booysen

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1. # Purpose

   The purpose of this SOP is to provide schools or its representative/s with technical insight, guidance, and detailed requirements for the creation of Microsoft Office 365 tenants on a per school basis.

2. # Scope

   This SOP is aimed at guiding schools, or their representatives, that intend to create and manage their own Microsoft Office 365 tenants, to perform these tasks themselves. The creation, management and administration of these own tenants will remain the responsibility of the school or its appointed representative/s. The only support calls to be logged and managed at Schools IT ServiceDesk will be issues experienced with the allocation of A3 licenses to schools with own tenants that form part of the MSA.

3. # Procedure

   ## Microsoft Office 365 Tenant Creation

   3.1 To create a new tenant and tenant account, please visit the Office.com Education option website which allows for new tenant creations. Link to website:
   https://www.microsoft.com/en-za/microsoft-365/academic/compare-office-365-education-plans

   3.2 Once the link has opened, the webpage indicates the different plans associated with Office 365 and the included apps available with each license type. Click on "**Get started for free**" at the top of the webpage. Please see image below:
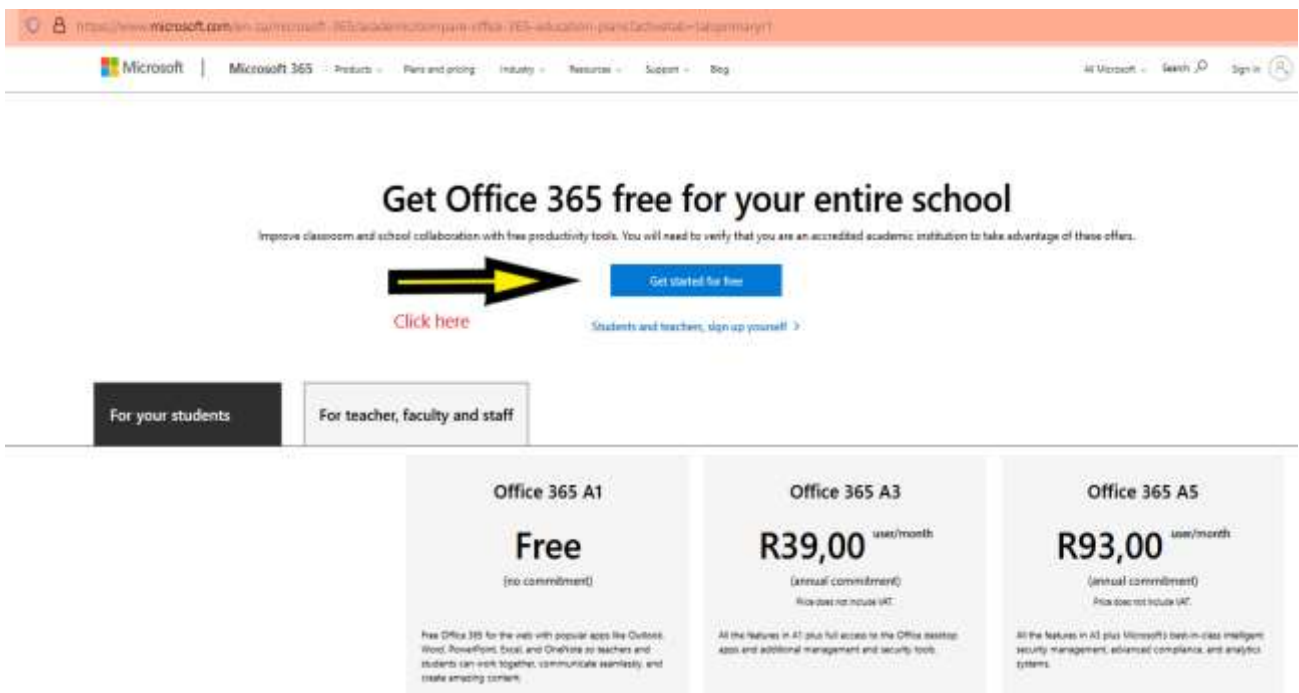
3.3 Initial set up of tenant.

Microsoft

You've selected Office 365 Education

Show more

(1) Let's get you started

Enter your work or school email address, we'll check if you need to create a new account for Office 365 Education.

Email

[   ]

This is required.

[Next]

(2) Tell us about yourself

(3) How you'll sign in

(4) Address & confirmation details

3.3.1   Enter your email address (this email address should be accessible to receive emails in order to complete the set-up process and management thereafter) then click "**Next**" and "**Set up account**".

3.3.2   Enter your name, company details, business contact details (a valid cell phone number required for verification purposes via SMS or call), then click "**Next**".

3.3.3   Choose your method of verification code receipt to the cell number provided in the previous step. Choose either **text** or **call**. Click "**Send verification code**".

3.3.4   Enter the received verification code in the text box and then click "**Verify**".

3.3.5   If the previous steps are successful, enter your username to be used to sign into your tenant. In addition to the username, the domain name is required as well. Examples of domain names are highlighted below:
Username@contoso.onmicrosoft.com
Username@hotmail.onmicrosoft.com

Please use your schools existing domain name that is in use for email address as provided by your hosting company. Once these details, in addition to a password, has been filled in, click "**Next**".

3.3.6   The final step is to fill in all additional details as seen below:

(4) Address & confirmation details

● ○ ○

We need a bit more info from you before you continue

Company name *

sdf

First name *   Middle name   Surname *

Test   Test

Address line 1 *

dfgasdf

Address line 2 (Optional)

Town/City *   Province (Optional)   Postcode *

Cape Town   7530

Country/Region *

South Africa   ⌄

Your Phone Number

███████

Email address *

███████@gmail.com

Microsoft respects your privacy. See our privacy statement.

Save

Complete by clicking "**Save**" and "**Use this address**". You will now enter your 10-digit tax reference number which is needed to purchase products in the tenant. Click "**Save**". Click "**Get Started**" to open the new Office 365 tenant that you have created.

4.   Tenant configuration

4.1 Now that the tenant has been created, it is time to add specific configuration detail in the tenant which will personalize the tenant uniquely for each school. Start by entering your school domain name (e.g. school.co.za or live.co.za) that is currently in use by the school for its email addresses:

Start setting up your school by adding a domain

Microsoft offers discounted pricing to eligible schools that add a domain. Enter your school's domain (like example.org). You'll sign in to your domain host (like GoDaddy) to verify you own it. Then we'll confirm whether you're eligible for the discount, applied when you purchase a subscription to Office 365 Education. Learn more about the discount

If you add your domain, we'll also help you set up usernames and email addresses for your students and staff to use with Microsoft 365. If you don't have a domain or don't want to add it, you can set up email addresses with the onmicrosoft.com domain instead.

(●) Add a domain owned by the school

domain.co.za

( ) Use TestSchool201.onmicrosoft.com for now. You can add your school's domain later from the admin center. ⓘ

(You may choose to use the domain stated in step 1.3.5 if you wish to complete this set up later. Skip to step 2.3 if you chose this option.)

4.2 If you have entered your school's domain, you will now be prompted to **verify your domain**. This is necessary for emails to work. You will need to contact your domain registrar (company hosting your emails) to complete this step. Provide them with the information that they require as seen on the screen. Options are **TXT record**, **MX record** and a **text file**. Once you have selected the relevant option, click "**Continue**" at the bottom of the page and then provide the domain registrar with the information displayed on the following screen. Click "**Verify**" to complete step:

How do you want to verify your domain?

Before we can set up domain.co.za, we need you to sign in to your domain host and verify that you own the domain. Learn how to find your domain host

◉ Add a TXT record to the domain's DNS records
   Recommended if you can create new DNS records at your registrar or DNS hosting provider. Learn more about DNS

○ If you can't add a TXT record, add an MX record to the domain's DNS records
   Recommended only if TXT records aren't supported by your domain host or registar.

○ Add a text file to the domain's website
   Recommended if you've already set up a website using this domain, for example, www.domain.co.za

Continue

Note:

The school needs to contact its Internet Service Provider (IT company providing internet and email services), also referred to as domain registrar, to complete the set up above.

4.3 Users can now be added to the tenant. Existing school email addresses should be used here. You may also skip this step by clicking "**Do this later**" to add users and email address later on. You will also be able to see the number of licenses available in the tenant. Because you have created a trial tenant for free, you should see 25 free trial A1 licenses in total, this number is also an indication that you have set up your trial version correctly:

Add users and assign licenses

Total Office 365 A1 for faculty licenses: 25
Licenses remaining: 24
Users you add here will be assigned a license for Office 365 A1 for faculty. View all users

To replace TestSchool201.onmicrosoft.com, go back and add your own domain. Add your domain before you add users, so you don't have to set them up twice.

First name	Last name	Username
Willie	Booysen	WillieBooysen@TestSchool201.onmicrosoft.com
		@TestSchool201.onmicrosoft.com
		@TestSchool201.onmicrosoft.com
		@TestSchool201.onmicrosoft.com
		@TestSchool201.onmicrosoft.com
		@TestSchool201.onmicrosoft.com

☑ Send passwords of new users to my email address.

Your email address
████████@TestSchool201.onmicrosoft.com

Do this later

4.4 Click "**Continue**" then click "**Go to Admin Center**" or enter a comment and click "**Submit**" on the **Feedback** page to be directed to your tenant's admin page.

Note:

- A1 licenses provide access only to online O365 services. For more information, go to: https://www.microsoft.com/en-us/microsoft-365/academic/compare-office-365-education-plans

- No A3 licenses is available at this stage.

5. Verify academic eligibility for Microsoft 365 Education subscriptions

5.1 If you are not sure if you have a Microsoft 365 Education trial subscription, use these steps to verify that you do. In the **Microsoft 365 admin center**, go to the **Billing > Your products** page. You should see Office 365 A1 trial licenses available for use, as well as their expiry dates.

5.2 In most cases, when you sign up for a free trial and complete the eligibility verification wizard to provide your school's domain, you will receive an immediate approval or denial of your school's eligibility. In some cases, Microsoft requires more information to complete a manual eligibility review and will reach out to you with a questionnaire to complete. This review can take up to 10 business days. After Microsoft reviews your school's eligibility information, they send an email that notifies you of your school's status.

You can close the academic verification wizard before entering a domain and start using the trial subscription right away (step 2.1). However, you aren't eligible for academic prices until you complete the verification process. You must complete the process before the end of your free trial to convert to a paid subscription and continue to use it. This also applies when you convert to the free A1 subscription.

If you have skipped the domain verification, you can always continue the process from the admin home page by clicking on the "**Add Domain**" option in the **Billing** card. Alternatively, click on this link to complete the process while you are signed into your tenant: https://go.microsoft.com/fwlink/p/?linkid=2135255
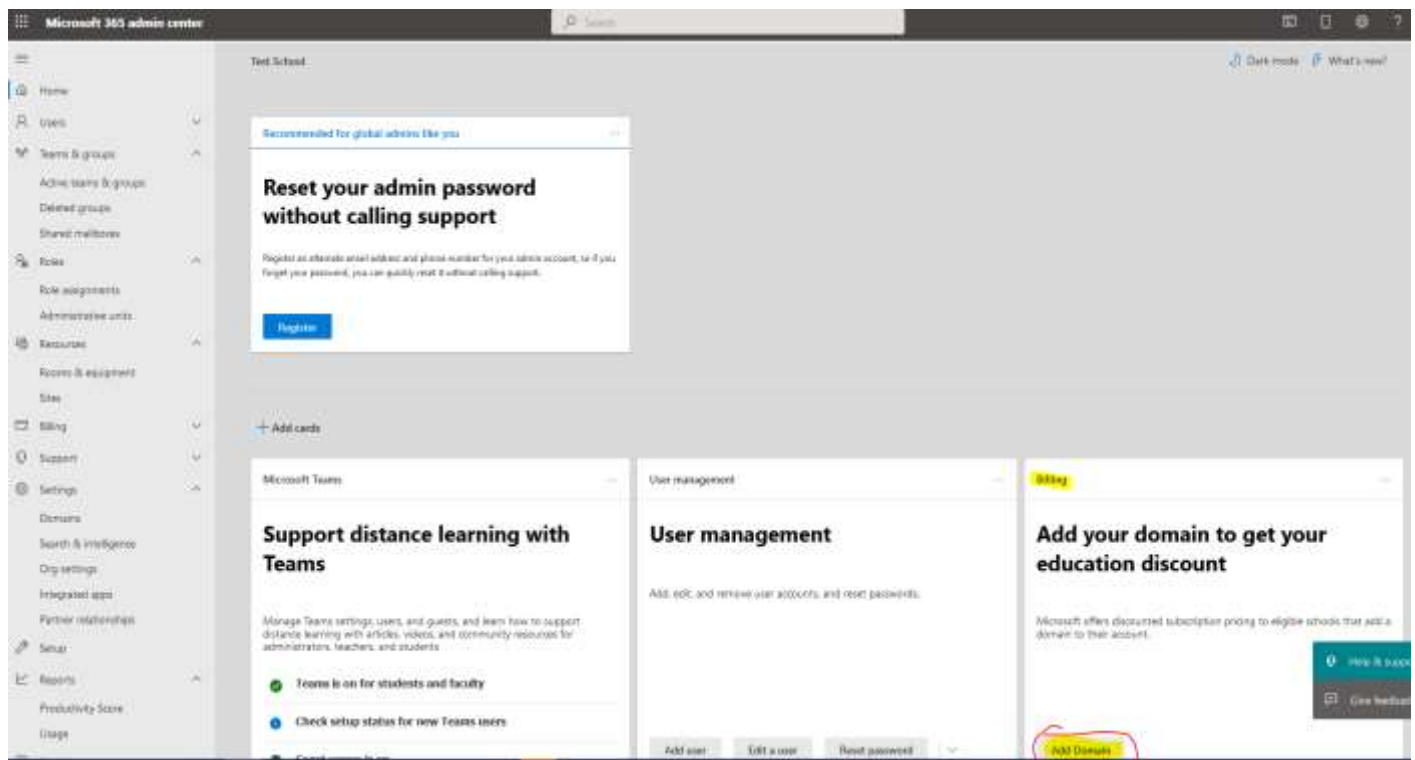

5.3 You can now check your academic eligibility status:
- Go to the **Microsoft 365 admin center**.
- On the **Home** page, find the **Billing** card.
- The **Billing** card indicates the status of the verification process. The card shows one of the following statuses: **Approved**, **Pending**, **Declined**, or **Add your domain**. (Refer to the above image indicating "**Add Domain**" as status.

Please see in the image below for an alternative manner to check the status of a school's academic eligibility:
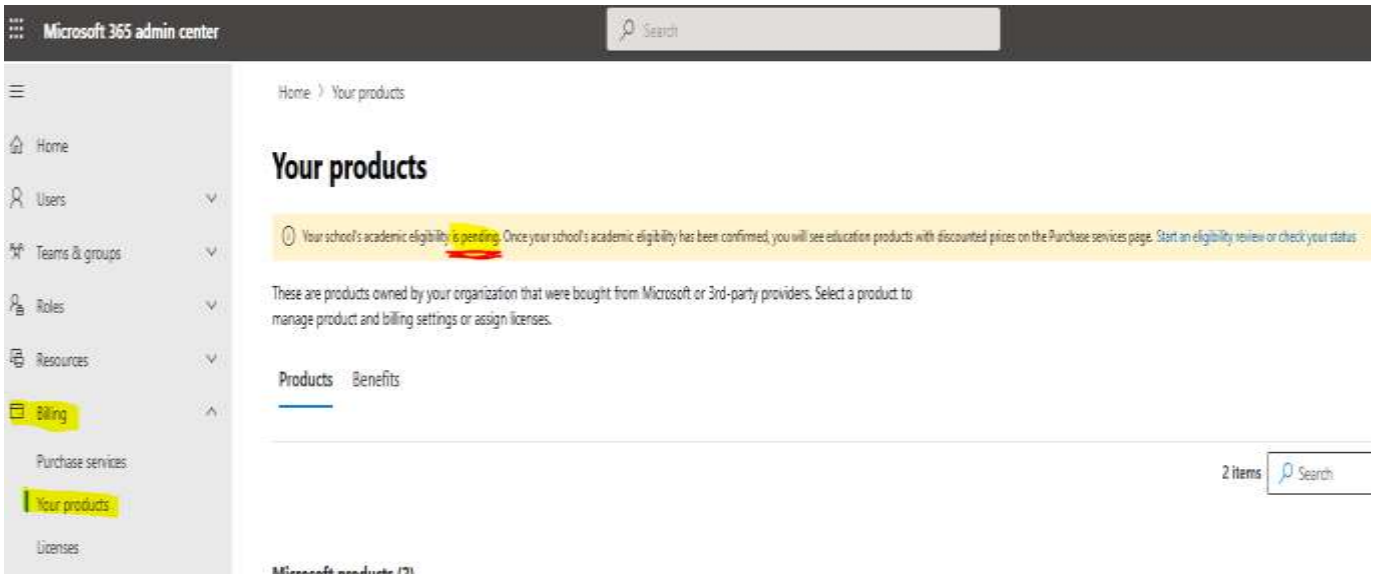
5.4 Once the school's academic eligibility has been approved, the school will have access to purchasing educational A1 subscriptions for the benefit of teachers and students. Although these products are free of charge, they still must be purchased at no cost through the **Microsoft 365 admin center** under **Purchase Services**. In **Purchase services**, type **A1** in the search bar and select the A1 licenses to purchase:
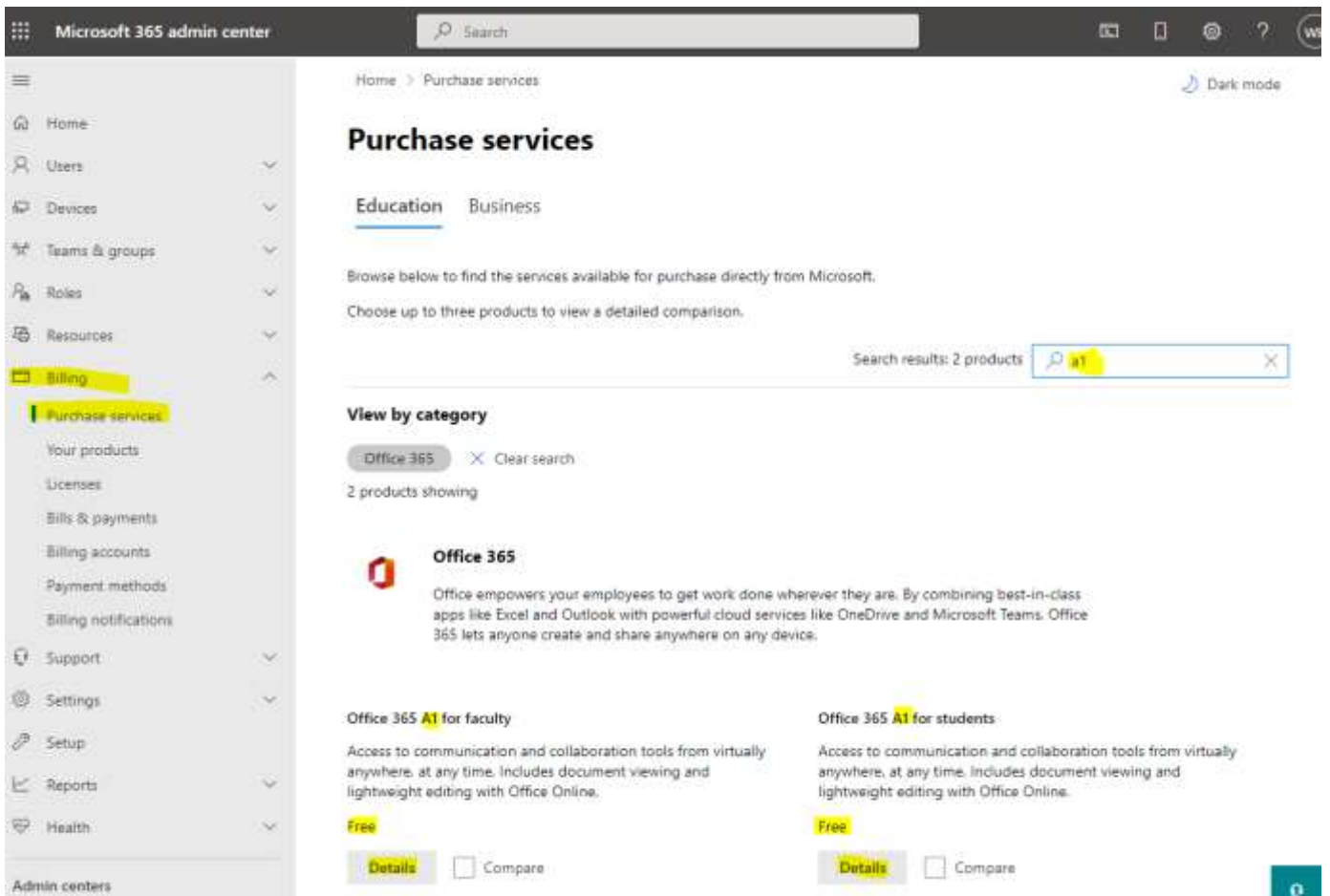
The school can now use their acquired A1 licenses to make use of online Microsoft Office products such as Word, Excel, PowerPoint, Emails, and all other products available with the A1 license. These A1 licenses should be assigned to users to make use of them.

6. Schools with own tenants

WCED ordinary public schools and selected independent schools eligible for the MSA who have opted to create their own O365 tenants, may request the WCED via a call logged at SchoolsIT ServiceDesk to have their own O365 tenants included in the MSA.

For successful inclusion the following prerequisites applies:

6.1   The school successfully created their own O365 tenant.

6.2   The school completed the Microsoft verification process that entitles them for the creation of a free O365 tenant using their own unique domain name (Refer to point 4.2).

6.3   The school supplied all the required information to the WCED such as:
- School Name
- District
- School Email Address
- Contact Details
- Tenant ID
- Domain used for Microsoft Office365 (@myschool.co.za)
- Number of Educators using O365
- Number of Students using O365

Note:

A link will be provided to complete the online questionnaire. It must be completed **prior to the anniversary date of 1 July 2022**. Schools with own tenants submitting their request after the deadline will qualify at the next anniversary date of 1 July 2023. They may continue to use their free O365 tenant for online services (A1) without the option to download MS O365 software for offline usage (A3).

7. New Domain Registrations

A domain name is required to make use of Office 365 for Education (please refer to step 5). WCED schools connect to the internet either through their own selected Internet Service Provider (ISP), or through broadband supplied by the Western Cape government. Each of these scenarios have a different approach when a domain registration is required. (Please proceed to these steps only if your school does not have a domain registered with usable email addresses)

7.1 Schools with own ISP:
These schools should contact their internet service provider. The internet service provider will then guide the school through the process of registering a domain.

7.2 Schools with government supplied broadband:
- Several Internet Service Providers (ISPs) provide domain registrations
- There are many more providers that can register domains, these can be found online

- Each provider requires an online registration through a wizard on its website or via telephonic contact to start the process of a domain registration
- Be sure to consider services pricing, expiration date and renewals when choosing your provider
- If uncertain about the services offered and needed from the provider, call them to ensure that you are getting the services that you need to use your Office 365 educational subscription (domain and email)
- Some examples of providers include:
    - GoDaddy.com
    - Domains.co.za
    - Afrihost.com
    - Hostafrica.co.za
    - Registerdomain.co.za

7.3 Domain registration example on GoDaddy.com (Please note that these steps are particular to Godaddy.com, but the process would be similar with other providers)

7.3.1   Navigate to GoDaddy.com in your internet browser and type in your preferred domain name which you would like to register. Click **Search Domain**:
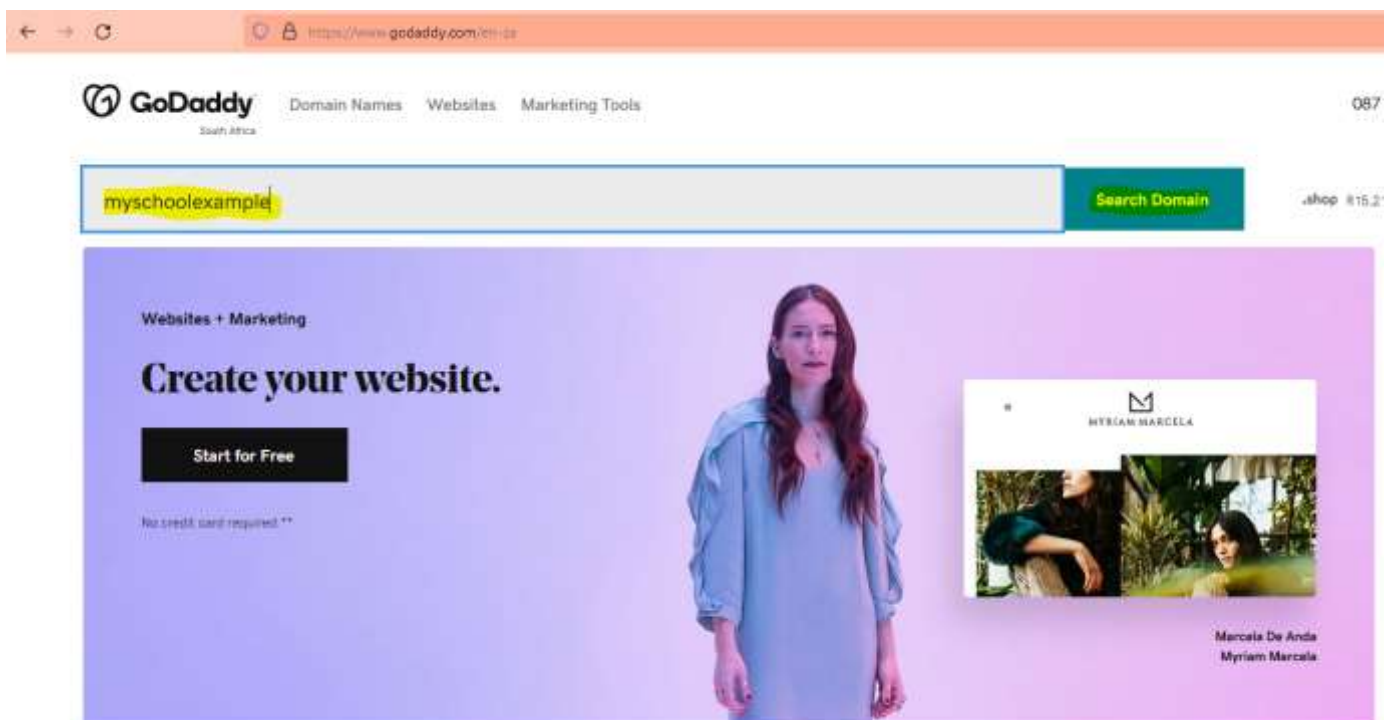
7.3.2   You can now see whether your chosen domain name is available or not. In the example below, the domain name is available. You can click **Get It**. Alternatively, if your domain name is not available, similar domain results are given at the bottom of the page. In this case "myschoolexample.com" and "schoolexample.co.za". You may also search for another domain name should you not be happy with the alternatives given.
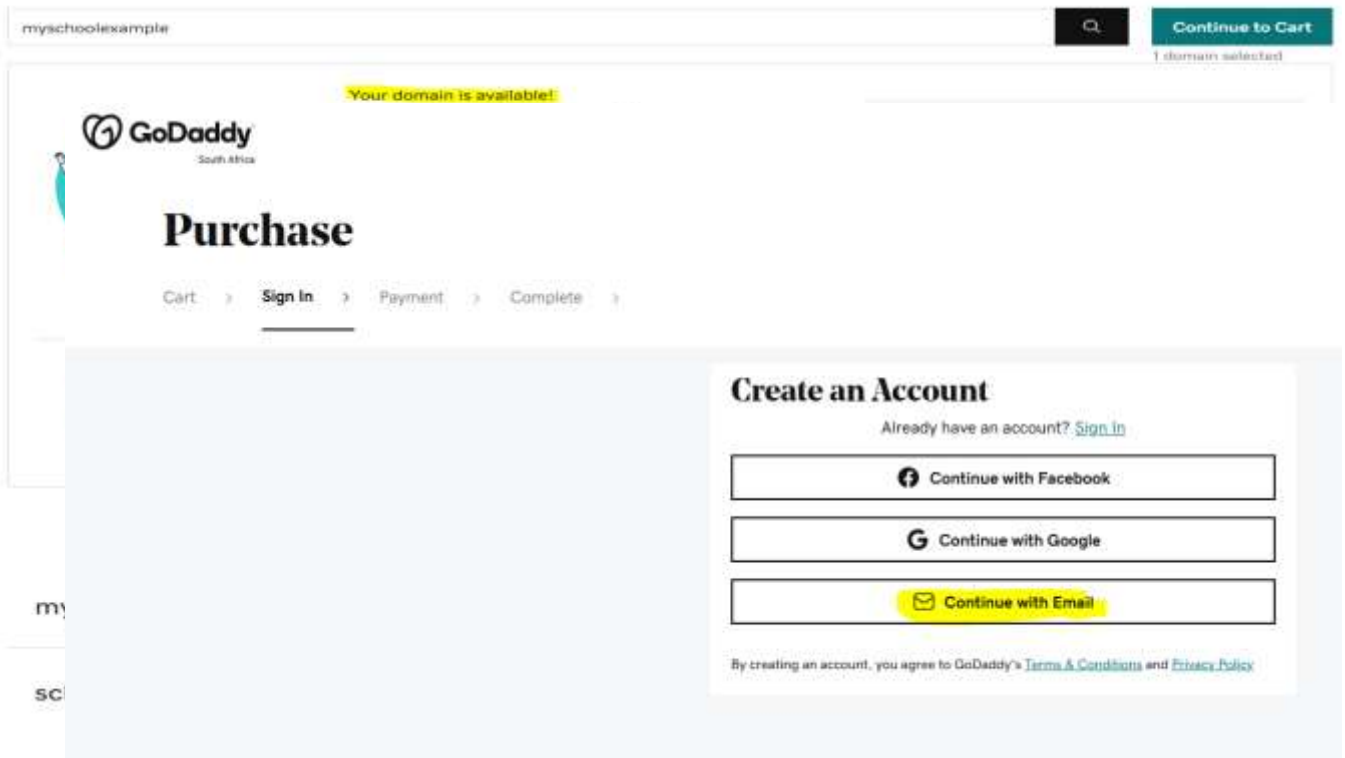
7.3.3   After you click **Get It**, a summary of your cart is shown. Click **Looks Good, Keep Going.**
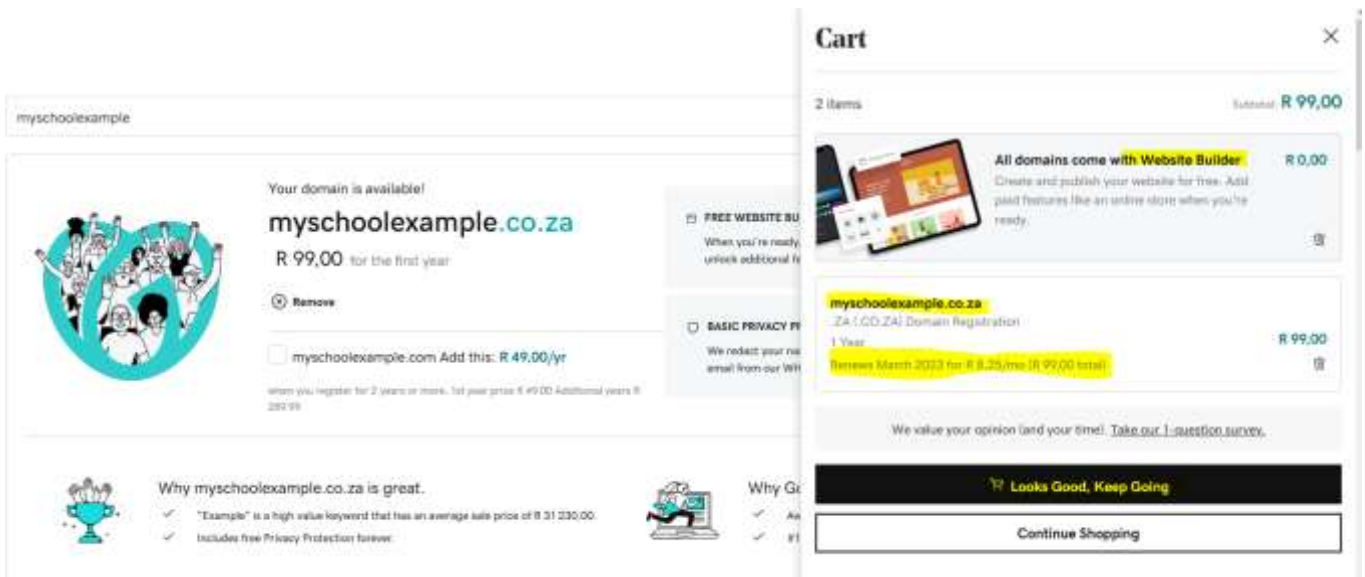
7.3.4   You will be required to create an account with GoDaddy.com in order to complete the purchasing process. Click **Continue with Email** or provide other details for the other two methods as indicated below.

7.3.5   Finally, provide all the required details to complete the purchase and click **Review Order**. After all these steps have been performed, your domain registration is completed. You

will receive further information via the email address that you provided regarding your new domain name and registration status.

Purchase

Additional Resources

https://docs.microsoft.com/en-gb/microsoft-365/commerce/subscriptions/verify-academic-eligibility?view=o365-worldwide

https://www.microsoft.com/en-us/microsoft-365/enterprise/compare-office-365-plans

https://www.microsoft.com/en-us/microsoft-365/academic/compare-office-365-education-plans