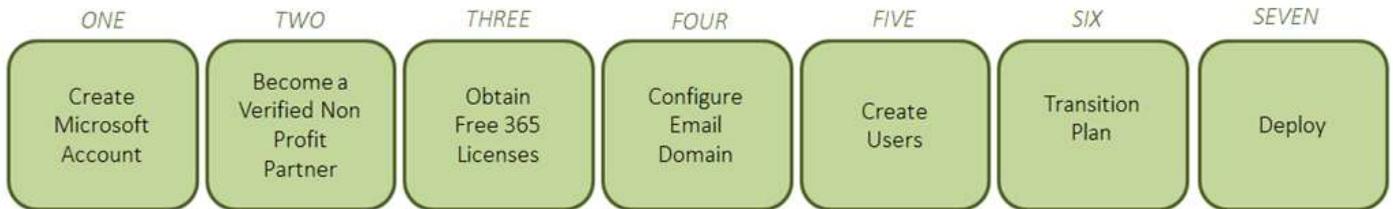


Let's get Microsoft 365 for FREE

By Bernardine Gawalski 07.12.2020

Below are the seven phases of implementing Microsoft 365.



PHASE ONE

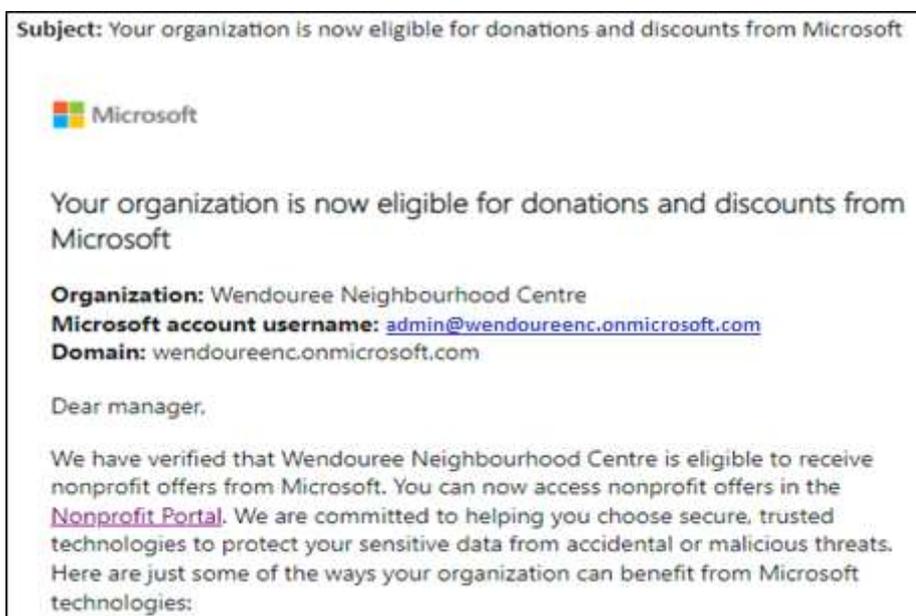
The first step is to create a Microsoft account & register as a Non-Profit organisation.

1. Navigate to <https://nonprofit.microsoft.com/en-us/getting-started>
2. Populate the requested information. You will the following House information:
 - Organisation legal name
 - ABN
 - Official mission statement
 - Website
 - Address
 - Reception Phone Number
 - Average yearly Budget in \$ USD for the house
 - How many people work for your house
3. When creating the username / email address, I would suggest using: admin@housename.onmicrosoft.com
For example, Wendouree NC uses: admin@wendoureeenc.onmicrosoft.com

Tip: Create a very strong password for this account, as this is will be your Microsoft 365 Admin Account.

PHASE TWO

Once completed, Microsoft will take the details of your Neighbourhood House and forward onto [Connecting Up](#) to verify the registered organisation. This can take between 5 to 15 business days to process. Once the registration verification has been completed, you will receive an email like below.



PHASE THREE

How to log into your Microsoft Account

1. Navigate to <https://login.microsoftonline.com/>
2. Login with the Neighbourhood Center *onmicrosoft.com* account you previously created.

Welcome to the Microsoft 365 Admin Centre

1. From the menu on the left side of the screen, expand 'Billing' and select 'Your Products'. Here you will see what licenses have been assigned to your Neighbourhood House Microsoft Account. By default, you should already have one product called 'Nonprofit Portal (Nonprofit Staff Pricing) Trial'.
2. From the menu on the left side of the screen, expand 'Billing' and select 'Purchase services'.
3. Search for the following two FREE services and add them to your account by selecting 'Get Now'
 - Microsoft 365 Business Premium (Nonprofit Staff Pricing) Donation
 - Office 365 E1 (Nonprofit Staff Pricing)
4. If you navigate back to 'Your products' page, you should now see all three products & licenses.

Product name ↑	Assigned licenses	Purchased quantity	Subscription status	Paid with
Microsoft 365 Business Premium (Nonprofit Staff P...	9	10	Active: Renews on 10/1/2021	Invoice
Nonprofit Portal (Nonprofit Staff Pricing) Trial	12	25	Active: Expires on 9/24/2030	Not available
Office 365 E1 (Nonprofit Staff Pricing)	2	20	Active: Renews on 11/13/2021	Invoice

The assigned licenses will note 0. This is a screenshot of the Wendouree House licenses in use

Microsoft Licenses Explained

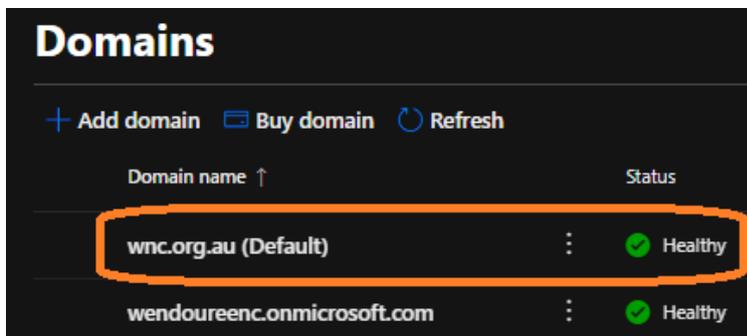
- [Microsoft 365 Business Premium \(Nonprofit Staff Pricing\) Donation](#)
This product offers the full office 365 suite both online & local offline installation on the computer. You will only receive 10 for free. If you wish to have more of these, they will be required to be purchased.
- [Office 365 E1 \(Nonprofit Staff Pricing\)](#)
This product offers the full office 365 suite, but the applications can only be used online. You can have as many free licenses of this product as you need/want. However, there is no offline capability to access the suite. If you wish to have offline capacity while using this license, you will need to apply for the FREE Office pro Plus 2016 through ACFE. ACFE.Education@insight.com For more information, [navigate here](#).
- [Nonprofit portal \(Nonprofit Staff pricing\) Trail](#)
This product is the portal for all users to connect into 365.

PHASE FOUR

Register the Email Domain (This part can be tricky)

What does email domain mean? Simply put, our goal is to configure an email address name for your organisation. For example xxxxxxx@WNC.org.au. To complete this phase, your Neighbourhood House will need to already own a domain name. For Example: *Crazy Domains, GoDaddy, Microsoft etc...*

1. From the menu on the left side of the screen, expand 'Settings' and select 'Domains'. By default, you should already have one domain called '*admin@housename.onmicrosoft.com*'. You do not want to use this, otherwise when you assign email address out, the email address will look like bernie@xxxxxxx.onmicrosoft.com simply ignore this domain.
2. Select 'Add Domain'. If you already own a website for example '*www.wnc.org.au*' then type this here. If you don't, you will need to purchase one.
3. The next step is for Microsoft to verify you are the owner of the domain name. To do this, you will need to add a TXT record in the back end of your domain register (DNS). The process for this is slightly different with different domain vendors. For Example: *Crazy Domains, GoDaddy etc...*
4. Once verified, several MX, CNAME, SRV TXT & name server DNS records will need to be added. Follow the Microsoft instructions to add these.
5. If the records have been added correctly in the DNS, Microsoft will run a final verify to complete the setup.
6. Your new domain after completion should be healthy.



Tip 1: Some domains may not have these settings enabled by default and may require additional payment to be enabled by the vendor.

Tip 2: Check to see if your house website is still running. If not, contact your domain support agent for assistance as the issue will be on located on the DNS server.

Tip 3: You can leave the domain creation at any point; it will automatically save where you are up to.

PHASE FIVE

Create Email User Accounts

What does creating users mean? The user account you create will be email address the staff member uses to send emails as well as log into their 365 account. Before you commence this activity, you will need the following:

- ✓ List of all employees in your house which will migrate over to Microsoft 365 (First & Surname Name)
- ✓ The employees work phone numbers
- ✓ The new email address of the employees
- ✓ The employees job title

1. From the menu on the left side of the screen, expand 'Users' and select 'Active Users'.
2. Select 'Add a user'
3. Type in the First & Surname of the Employee and let the display name automatically populate
4. Type in the username for the email address and select the new domain.
5. Select 'Let me create the password' and type something like **Changepass12#**
6. Check the 'require this user to change their password when they first sign in' tick box
7. Select Next.

For example:

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

First name: Bernardine
Last name: Gawalski
Display name: Bernardine Gawalski
Username: itsupport @ wmc.org.au
Password settings:
 Auto-generate password
 Let me create the password
Password: [masked] Strong
 Require this user to change their password when they first sign in
 Send password in email upon completion
Next

8. On the next page, set the location to 'Australia' then assign the licenses to the user. By default the employee will need 'Nonprofit Portal' so they can access 365, and will need to apply either Microsoft 365 Business Premium (Nonprofit Staff Pricing) Donation OR Office 365 E1 (Nonprofit Staff Pricing). Please refer to page 2 for Microsoft Licenses Explained. Select Next.
9. On the next page populate the employee job title & work phone number and select 'next'
10. This page is a review. If all correct, select 'Finish Adding'
11. Repeat this phase for all new accounts.

PHASE SIX

Planning the Transitioning

Now that you have everything set up, it's time to plan out how to deploy this innovation to your employees. Here are some tips to consider when rolling out an innovation.

- End user technical ability
- Computer hardware specifications
- User guides
- How will the house employees be supported during & after the transition
- Communication strategy
- Updating your manager during each of the main stages

Here is an example of how the Wendouree Neighbourhood House Microsoft innovation was deployed.

1. Created a timeline/checklist for various stages of the transition.
2. Sent an email update out to the staff that will be transitioned over to the new solution, letting them know of the changes to come, estimated timelines and offering support to answer any questions or concerns. Innovation migrations can be quite daunting for an end user. It's important to ensure they feel supported throughout the process.
3. Completed Microsoft 365 configurations.
4. Created a user tutorial on how to log into 365 for the first time, general navigation, migrating emails & contacts over to the new solution. Here is an example created for Wendouree.



MS365 Basics User
Guide.pptx

5. Sent an email out to all the employees with their new login details along with basics user guide. Here is an example of what was sent.

I am excited to announce the launch of Microsoft Office 365 for WNC.

What does this mean for you? As of today, you will receive a new WNC email address & have access to a new suite of Microsoft applications & collaboration tools.

- Outlook Emails with 50GB of mail storage
- Calendar to schedule out your day & manage your meetings / classes
- Teams will enable you to directly message & video call each other
- One Drive with 50GB of file storage
- SharePoint with 1TB of file store (File storage managed by WNC Manager)
- Word, Excel, PowerPoint & One Note
- Forms, for building surveys & templates
- Planner, to help you break down your projects
- Sway, for sharing interactive presentations & reports
- To Do, for creating quick To Do lists on the go

Attached to this email is a 'Basics User Guide' that will help you along in your 365 journey.

Please see your login details below:

Web Link - <https://www.office.com/>
Username - community@wnc.org.au
Temporary Password - [change pass33](#)
NOTE: When you login for the first time, you will be automatically prompted to change your password.

It is recommended you begin using your new Microsoft account and commence referring your contacts to the new email address. This can be achieved by sending an email from your 365 account to your current list of contacts explaining the transition, and by also creating an auto reply on your old account.

After navigating through the basics of 365 via the instruction of the attached user guide, if you have any support questions, please reach out.

For your reference, below is a list of all new email address created for the Wendouree Team.

WNC Staff Member	Email Address
Manya Ferwanda	manager@wnc.org.au
Judy Emson	reception@wnc.org.au
Sharni Hutchinson	finance@wnc.org.au
Fiona Beaumont	laaribical@wnc.org.au
Skye Martin-McCarrin	community@wnc.org.au
Simon Dwyer	library@wnc.org.au
Alison Andrew	trainer1@wnc.org.au
Catherine Collins	trainer2@wnc.org.au
Hayth Taels	trainer3@wnc.org.au

Kind regards,
Bernardine Gassaleki

- The following week, contacted each of the employees to find out how they are progressing with the transition and make a time with them to provide onsite & remote assistance. Below is an example of what was sent for Wendouree.

I would love the opportunity to follow up with you to see how you are going with migrating over to 365, and provide you with the support you need to become more comfortable with the new suite of applications & processes.

If you could let me know what time suites you either today or tomorrow, it would be great to catch up via phone call.

The purpose of the call is to find out how you are feeling about the new applications and what support you would like from me to help you achieve a comprehensive understanding. Once we have this initial discussion, next week I will come into the office and walk you through everything you need to know. 😊

Hope to hear from you soon.

Kind regards
Bernie Gawalski
0400 243 444

- Because Wendouree had an iiNet ncable account set up for emails, I was able to configure the admin settings to auto forward all emails from the old account to the new.
- After a week, followed up with everyone individually to check migration progression and provided next steps for the migration. Below is an example of what was sent for Wendouree.

Communication at BNC
Thu 19/11/2020 12:12 PM
To: Marga Ferreira <reception@wnc.org.au>; Fiona Beaumont <learnlocal@wnc.org.au>; community@wnc.org.au; Sharni Hutchinson <finance@wnc.org.au> +4 others

Hello & good afternoon to the wonderful staff at WNC.

As part of the transition to Microsoft 365, you received a new email address, which has been in use for the past couple weeks. Great to hear everyone is going well with the transition, please keep reaching out to me when you need support.

The next step to help you with the email transition is to make sure you keep receiving all your emails from your ncable account. At this stage your ncable email will remain active, and today I have made some back-end settings changes to that account.

What do these new setting changes do? As of this afternoon, you will begin to receive an automatic forward of emails going from your ncable to your Microsoft email address. I have set this up so it will save you time checking emails between inboxes and missing important communications.

Your next steps: Please ignore the steps if you have already completed them.

- Communicate with your email contacts on the change of email address. The easiest way to do this is simply send them an email explaining the change. It's also a good idea to have this information displayed in your email signature.
- Make a list of all the online website services & subscriptions you have registered with your ncable account, and begin to update them with the new email address or by simply closing the account. Don't forget to update the login book at reception if required.

Like mentioned before, please feel to contact me if you have any questions. I am available Monday to Friday, 8am to 4pm and can connect via Teams, Mobile or Email.

Kind regards,
Bernardine Gawalski
0400 243 444

- Over the next couple weeks, supported staff in questions and learning of new tools like Microsoft forms.
- Set a date to turn off the old email address.
- Innovation complete.

PHASE SEVEN

Deploy

Now it's time to action your plan. Good luck.