Office 365 Admin Center

Created By:
Carter-McGowan Services, LLC

Welcome to the Future of Productivity.
About Me

- Nikkia T. Carter, CEO/Owner of Carter-McGowan Services, LLC (Industry Experience since 2001)
- **Microsoft Partner/VAR (Value Added Reseller):** Silver Small and MidMarket Cloud Solutions, SMB Champion
- **Other Partnerships/VARs:** Constant Contact, Hootsuite, BrainStorm
- **Certifications:** CompTIA Certified Technical Trainer (CTT), Microsoft Certified Professional
- **Other Roles:** IAMCP DC Philanthropy Chair, Board Member, and WIT Community Leader, Microsoft VFI Board Member, SUGDC and MFCF-DC Co-organizer, FEDSPUG Board Member, Microsoft WPC PEB Member, Microsoft MCC PEB Member, IAMCP WIT Board Member
- Specialize in business technology consulting, setup, migration, development, support, training and training material
- **Past Experience:** Application, Intranet / **Recent:** SharePoint, InfoPath, Office 365
- **Past Clients:** DoD (Navy, Army, AF), NSF / **Recent Clients:** Mostly commercial organizations and entrepreneurs (many nonprofits, bail bondsman, insurance agent, tech consultant, defense contractors, facilities management company, US Courts, Center of Medicaid and Medicare, NIST, etc.).

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www.cartermcgowanservices.com
About Me

If you are interested in events I attend/speak at:
www.cartermcgowanservices.com/where-we-will-be

- Webinars on SharePoint and Office 365
  - Volunteer events
  - Places I am speaking
    - Etc.
Before we get started...
Stay Connected -

- DMVMUG (District of Columbia, Maryland and Virginia Management User Group) Event
  - [http://www.dmvmug.com/](http://www.dmvmug.com/) (link doesn’t seem to be active)
  - ???

- PASS DC (SQL Server User Group) Monthly Meetings here in the Microsoft offices in Chevy Chase, MD
  - [http://passdc.sqlpass.org/](http://passdc.sqlpass.org/)
  - Meetings on 2nd Thursday @ 6:30pm (Microsoft Chevy Chase, 5th floor)

- Reston SharePoint User Group
  - Meetings on 1st Monday @ 11:30 am (Microsoft Reston Office 3rd floor)
Stay Connected -

• FEDSPUG/WSPDC (Federal SharePoint User Group/Women In SharePoint DC) Monthly Meetings
  - [http://www.meetup.com/FEDSPUG](http://www.meetup.com/FEDSPUG)
  - Meetings 1st Thursday @ 7pm (Microsoft Chevy Chase Office 5th floor)

• SUGDC (SharePoint User Group DC) Monthly Meetings
  - [http://www.sugdc.org](http://www.sugdc.org)
  - Meeting 2nd Thursdays @ 6:30 pm (Protiviti office in McLean)

• Mobile-First, Cloud-First of DC Monthly Meetings
  - [http://www.meetup.com/MFCF-DC](http://www.meetup.com/MFCF-DC)
  - Meetings last Thursday of month (except holiday months; see MeetUp) @ 6:30 pm 7 pm (Microsoft Chevy Chase Office 5th floor)
Stay Connected -

- IAMCP DC (International Association of Microsoft Channel Partners DC) Monthly Meetings
  - [http://iamcp.site-ym.com/](http://iamcp.site-ym.com/)
  - Meetings 3rd Wednesdays of month (mostly Microsoft Chevy Chase office, 5th floor)

- IAMCP DC WIT (Women in Technology)
  - Forming now so meetings TBD
  - Seeking those who care about adding more women to tech fields
  - Focus on education, advocacy, and events
Stay Connected -

- Get Certified – Microsoft Technology Associate (MTA) Test-Fest! Coming Summer 2015?

- IT Pro Camp 2015 - February 2015 in DC!
  www.itprocamp.com

- Office 365 Day – Coming in August.

- Check out SharePoint Saturday Events -
  http://www.spsevents.org/
Topics Covered
Covered Topics

* Background
* Overview of Office 365 Admin Portal
* Handling Your Users
* Overview of Lync Admin Center
* Overview of Exchange Admin Center
* Overview of SharePoint Admin Center
* Tips
Background
Office 365

Background
What is Office 365?

* **Office 365** is a subscription-based service which offers access to various services and software built around the Microsoft Office platform.

* Serving as a successor to Microsoft's Business Online Productivity Suite, it first included hosted versions of
  * Exchange – Keep everyone in sync with enterprise-grade email and shared calendars they can access at their desk or on the go.
  * Lync – Connect immediately or set up and host online meetings with multi-party HD video conferencing, real-time note taking, and screen sharing.
  * SharePoint – Collaborate with teammates, partners, and customers with documents that are always up to date and accessible from almost anywhere.
  * Website - Market your business with a website that's easy to set up and update—with no hosting fees. < GOING AWAY END OF JAN 2015
  * Office Web Apps - Create, store, edit, and share Office docs online.
  * Microsoft Office Professional Plus (current and previous version) desktop applications (Mac and PC) on the E3 and some other plans.

* Office 365 Home is only Office on your desktop.
Lync

Background
What is Lync?

Lync is a Microsoft product created to enable people to collaborate in real time. Lync enables Office 365 users to:

- See the online status of other team members.
- Connect with colleagues through instant messaging.
- Make audio or video calls.
- Host online meetings.
- Share and transfer files.
- Record your audio and video calls.
- Set up dial-in conferencing.
- Share your desktop.
- Use a whiteboard.
- Save notes to your OneNote notebook.
Exchange

Background
What is Exchange?

Exchange is email, calendaring, task, and contact management software, an email server and contact manager developed by Microsoft. It is usually accessed via Outlook but can also be accessed via OWA or through Office 365 (Outlook Web App).
SharePoint

Background
What is SharePoint?

"SharePoint" is shorthand that some people use to refer to one or more Microsoft SharePoint products or technologies. You can use SharePoint to set up collaborative sites to share information with others, manage documents from start to finish, and publish reports to help everyone make better decisions.

The collaborative site that you and your team will work in is called a Team Site. This is an example of a team site.

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Office 365 Admin Portal

Overview
What is the Admin Portal?

The Office 365 Admin Portal is a central place to administer your organization’s account.
What is Admin Portal?

<table>
<thead>
<tr>
<th>AREA</th>
<th>PURPOSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Getting started pane</td>
<td>This pane is available for the first 30 days. It includes links and wizards to get you started using Office 365, including links to videos, a setup wizard, and software to download.</td>
</tr>
<tr>
<td>Dashboard</td>
<td>This is the landing page for Office 365 administrators. You can see a quick overview of your service health and usage, and access helpful resources for administering Office 365. For more information, see Service Health.</td>
</tr>
<tr>
<td>Setup</td>
<td>This page provides step-by-step setup guidance, and includes options for basic and custom setup.</td>
</tr>
<tr>
<td>Users &amp; groups</td>
<td>This is the central place to do most tasks related to users and groups. You can add, edit, or delete users, reset passwords, assign licenses, set up security groups, and manage any delegated administrators. You can also use this page to set up single sign-on and directory synchronization. For more information, see User Account Management.</td>
</tr>
<tr>
<td>Domains</td>
<td>This is the central place to manage your Office 365 domains. You can add or remove domains, view DNS settings, and troubleshoot domain-related issues. For more information, see Domains.</td>
</tr>
</tbody>
</table>

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# What is Admin Portal?

<table>
<thead>
<tr>
<th>AREA</th>
<th>PURPOSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Licensing</td>
<td>You can view the details of your subscriptions and their term end dates, view the number of assigned licenses, and renew subscriptions.</td>
</tr>
<tr>
<td>Service settings</td>
<td>The Office 365 admin center contains links to commonly used Exchange Online service settings, as well as password, community participation, and mobile settings. Additional service settings are managed in the Exchange admin center, Lync admin center, and SharePoint admin center.</td>
</tr>
<tr>
<td>Service health</td>
<td>You can view service health for all your services, a historical view of incidents that affected your service, and upcoming planned maintenance. You can also sign up for an RSS feed for service incidents.</td>
</tr>
<tr>
<td>Reports</td>
<td>You can view reports for all your services. The reports are grouped by the services included in your subscription.</td>
</tr>
<tr>
<td>Support</td>
<td>You can search for answers, view solutions to common issues, and access troubleshooting tools. You can create a new service request online or review existing service requests. If you prefer to call Support, this page includes contact information.</td>
</tr>
<tr>
<td>Purchase services</td>
<td>Purchase additional subscriptions.</td>
</tr>
</tbody>
</table>
What is Admin Portal?

Admins can configure basic settings for all Office 365 services from one location.

<table>
<thead>
<tr>
<th>AREA</th>
<th>PURPOSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service settings</td>
<td>The following Exchange Online settings can be managed from the Office 365 portal:</td>
</tr>
<tr>
<td></td>
<td>• Places</td>
</tr>
<tr>
<td></td>
<td>• Facebook and LinkedIn contact sync</td>
</tr>
<tr>
<td></td>
<td>• Calendar settings</td>
</tr>
<tr>
<td></td>
<td>• Email on phones using Exchange ActiveSync</td>
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<tr>
<td></td>
<td>• External contacts</td>
</tr>
<tr>
<td></td>
<td>• Shared mailboxes</td>
</tr>
<tr>
<td></td>
<td>• Distribution groups</td>
</tr>
<tr>
<td></td>
<td>The following SharePoint Online settings can be managed from the Office 365 portal:</td>
</tr>
<tr>
<td></td>
<td>• Manage public website</td>
</tr>
<tr>
<td></td>
<td>• Manage team site</td>
</tr>
<tr>
<td></td>
<td>• Delegate site administrators</td>
</tr>
</tbody>
</table>
### What is Admin Portal?

<table>
<thead>
<tr>
<th>AREA</th>
<th>PURPOSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service settings</td>
<td>The following Lync Online settings can be managed from the Office 365 portal:</td>
</tr>
<tr>
<td></td>
<td>• Instant messaging notifications on mobile devices</td>
</tr>
<tr>
<td></td>
<td>• Dial-in conferencing</td>
</tr>
<tr>
<td></td>
<td>• Online presence</td>
</tr>
<tr>
<td></td>
<td>• External communications</td>
</tr>
<tr>
<td></td>
<td>• Recording</td>
</tr>
<tr>
<td></td>
<td>The following additional settings can be managed from the Office 365 portal:</td>
</tr>
<tr>
<td></td>
<td>• Password expiration policy</td>
</tr>
<tr>
<td></td>
<td>• Email on phones using Exchange ActiveSync</td>
</tr>
<tr>
<td></td>
<td>• Instant messaging notifications on mobile devices</td>
</tr>
</tbody>
</table>
Handling Your Users
Handling Your Users

As the Office 365 admin, you need to create a user account for everyone in your organization who uses Office 365 services. When you create or edit a user account, you can also assign licenses to the user and set a user’s administrative permissions. You can also delete an account if it is no longer needed.
Handling Your Users

Add New Users
Add New Users

To create a single user account by doing the following:

1. Go to Admin > Office 365 > Users and groups > Add+.

2. On the Details page, complete the user information. To add optional user information, click the arrow next to Additional details. When you’re finished, click Next.
Add New Users

3. On the **Settings** page, click **Yes** if you want to assign the user admin permissions.

If you clicked **Yes**, select an admin role. If you have chosen to give the user an admin role, you also need to provide an **Alternate email address**.

4. Under Set user location, select the user’s work location, and then click **Next**.
Add New Users

5. On the Assign licenses page, select the licenses that you want to assign to the user, and then click **Next**.

If you have no licenses available, you can remove licenses from existing users who no longer need them, delete user accounts that are no longer needed to free up licenses, or **Buy more licenses**.
Add New Users

6. On the Send results in email page, select Send email, type your email address, and then click Create.

You can enter a total of five email addresses.

7. Review the information on the Results page, and then click Finish or click Create another user to repeat the process.

Some changes may take time to apply across multiple services.
Add New Users

If your organization uses more than one domain, here are some things to be aware of when you create a user account:

- You can create user accounts with the same user principal name (UPN) across domains if the first account you create is, for example, `geoff@contoso.onmicrosoft.com`. That account must use the “onmicrosoft” portion of the domain name. You could then also create the account `geoff@contoso.com`.
- You cannot create `geoff@contoso.com` followed by `geoff@contoso.onmicrosoft.com`.

**Notes**

- If you want to add several users all at once, you can add multiple users with a CSV file.
- If your organization has established email coexistence, you must create and edit all user accounts in your local Active Directory directory service.
Add New Users

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- You can create user accounts with the same user principal name (UPN) across domains if the first account you create is, for example, geoff@contoso.onmicrosoft.com. That account must use the “onmicrosoft” portion of the domain name. You could then also create the account geoff@contoso.com.
- You cannot create geoff@contoso.com followed by geoff@contoso.onmicrosoft.com.

**Notes**

- If you want to add several users all at once, you can add multiple users with a CSV file.
- If your organization has established email coexistence, you must create and edit all user accounts in your local Active Directory directory service.
Handling Your Users

Edit Users
**Edit Users**

*Important* If the user that you are trying to edit is synchronized with your Active Directory service, an error message appears. You’ll be unable to edit the user using this procedure. To edit the user, use your local Active Directory management tools.

**Use this procedure to edit a single user’s information:**

1. Go to Admin > Office 365 > Users and groups.
2. On the Active users page, click the user that you want to edit, and then click Edit Edit.

3. Click the Details, Settings, Licenses, or More tabs, depending on the changes that you want to make.

**Important** If you block a user from having sign-in access to Office 365, it will take about an hour to take effect on all that user’s devices and clients. Also, make sure that you remove or disable the user from your on-premises Blackberry Enterprise Service, or BlackBerry Business Cloud Services. You should also disable any Blackberry devices for the user. Refer to the Blackberry Business Cloud Services Administration Guide if you need specific steps on how to disable the user.

4. Complete your changes, and then click Save.


Handling Your Users

Edit Multiple Users
Edit Multiple Users

*Important* If the users that you want to edit are synchronized with your Active Directory service, you won’t be able to complete this procedure; the changes won’t be applied on the Results page. To edit multiple users, use your local Active Directory management tools.

**Use this procedure to edit user information or assign licenses for multiple users:**

1. Go to Admin > Office 365 > Users and groups.
2. On the Active users page, click the users that you want to edit, and then click Edit Edit.
3. On the Details and Settings pages, edit the information as needed, and then click Next. Or, just click Next if you have no changes to make on those pages.

*Important* If you block a user from having sign-in access to Office 365, it will take about an hour to take effect on all that user’s devices and clients. Also, make sure that you also remove or disable the user from your on-premises Blackberry Enterprise Service, or BlackBerry Business Cloud Services. You should also disable any Blackberry devices for the user. Refer to the Blackberry Business Cloud Services Administration Guide if you need specific steps on how to disable the user.

4. On the Assign licenses page, do one of the following, and then click Submit:
   - If you’re not making any changes to the existing license assignments, click Retain current license assignments.
   - To replace existing license assignments, click Replace existing license assignments, and then choose one or more licenses from the list.
   - To add licenses to the existing license assignments, click Add to existing license assignments, and then choose one or more licenses from the list.
5. Review the information on the Results page, and then click Finish.

Some changes may take time to apply across multiple services.
Handling Your Users

Delete Users
Delete Users

To delete one or more users:

1. Go to Admin > Office 365 > Users and groups.
2. On the Active users page, click the user or users that you want to delete, and then click Delete.
3. In the confirmation message, click Yes.
Handling Your Users

Restore Users
Restoring Users

When you restore a user account within 30 days after deleting it, the user account and all associated data are restored. The user can sign in to Office 365 with the same user ID, their mailbox is fully restored, and they have access to all services they previously accessed.

Before you restore a user account, make sure there are Office 365 licenses available that you can assign to the account. Also, when you restore an account, you may encounter conflicts with user names or proxy addresses, which you can resolve.

To restore one or more users:
1. Go to Admin > Office 365 > Users and groups > Deleted users.
2. On the Deleted users page, choose the names of the users that you want to restore, and then click Restore users.
3. In the confirmation box, click Close.

Admin Settings
Overview of Lync Admin Center

Admin Settings
Overview of Lync Admin Center

Lync Online provides a single unified management console that is optimized for management of on-premises, online, or hybrid deployments. The Lync admin center (LAC) is where administrators manage Lync-specific settings.
Overview of Lync Admin Center

In the **Users** section, you can manage each user's Lync settings.

<table>
<thead>
<tr>
<th>DISPLAY NAME</th>
<th>USER NAME</th>
<th>LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alex Darrow</td>
<td><a href="mailto:AlexD@cartermcgowan.onmicrosoft.com">AlexD@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>Allie Ben</td>
<td><a href="mailto:AllieB@cartermcgowan.onmicrosoft.com">AllieB@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>Ann Walace</td>
<td><a href="mailto:AnnieW@cartermcgowan.onmicrosoft.com">AnnieW@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>Aziz Hassouni</td>
<td><a href="mailto:AzizH@cartermcgowan.onmicrosoft.com">AzizH@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>Belinda Newman</td>
<td><a href="mailto:BelindN@cartermcgowan.onmicrosoft.com">BelindN@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>Bonnie Kearney</td>
<td><a href="mailto:BonniK@cartermcgowan.onmicrosoft.com">BonniK@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>David Longmuir</td>
<td><a href="mailto:DavidL@cartermcgowan.onmicrosoft.com">DavidL@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>Denis Delorme</td>
<td><a href="mailto:DenisD@cartermcgowan.onmicrosoft.com">DenisD@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>Dorena Paschke</td>
<td><a href="mailto:DorenrP@cartermcgowan.onmicrosoft.com">DorenrP@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>Fabrice Canel</td>
<td><a href="mailto:FabriC@cartermcgowan.onmicrosoft.com">FabriC@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>Gennet Verges</td>
<td><a href="mailto:GennetV@cartermcgowan.onmicrosoft.com">GennetV@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>Garth Fort</td>
<td><a href="mailto:GarthF@cartermcgowan.onmicrosoft.com">GarthF@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>Janet Schor</td>
<td><a href="mailto:JanetS@cartermcgowan.onmicrosoft.com">JanetS@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>Julian Isla</td>
<td><a href="mailto:JulianI@cartermcgowan.onmicrosoft.com">JulianI@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>Junmin Hau</td>
<td><a href="mailto:JunminH@cartermcgowan.onmicrosoft.com">JunminH@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>Karl Fruin</td>
<td><a href="mailto:KarlF@cartermcgowan.onmicrosoft.com">KarlF@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>Katia Jordan</td>
<td><a href="mailto:KatiaK@cartermcgowan.onmicrosoft.com">KatiaK@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>MOD Administrator</td>
<td><a href="mailto:admin@cartermcgowan.onmicrosoft.com">admin@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>Molly Dempsey</td>
<td><a href="mailto:MollyD@cartermcgowan.onmicrosoft.com">MollyD@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>Pavli Bresky</td>
<td><a href="mailto:PavliB@cartermcgowan.onmicrosoft.com">PavliB@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>Rob Young</td>
<td><a href="mailto:RobY@cartermcgowan.onmicrosoft.com">RobY@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>Robin Counsell</td>
<td><a href="mailto:RobinC@cartermcgowan.onmicrosoft.com">RobinC@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>Sara Davis</td>
<td><a href="mailto:SaraD@cartermcgowan.onmicrosoft.com">SaraD@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
<tr>
<td>Tony Krijnen</td>
<td><a href="mailto:TonyK@cartermcgowan.onmicrosoft.com">TonyK@cartermcgowan.onmicrosoft.com</a></td>
<td>US</td>
</tr>
</tbody>
</table>
Overview of Lync Admin Center

In the **Organization** section, you can manage organization’s General settings and External Communications.

### Lync Admin Center

**users**

**organization**

dial-in conferencing

meeting invitation

<table>
<thead>
<tr>
<th>general</th>
<th>external communications</th>
</tr>
</thead>
</table>

#### presence privacy mode

By default, anyone who can communicate with one of your users can also see that user’s presence information. You can make presence information for all users available only to their contacts. Individual users can later change this setting themselves using Lync [Learn more](#).

- Automatically display presence information
- Display presence information only to a user’s contacts

#### mobile phone notifications

You can turn on alerts for incoming instant messages (IMs), voice mail messages, and missed IMs or missed calls for Lync Mobile users by using a push notification service instead of Microsoft Office 365 to send those alerts. Depending on your supported mobile devices, you can use the Microsoft Push Notification Service, the Apple Push Notification Service, or both [Learn more](#).

- Microsoft Push Notification Service
- Apple Push Notification Service

[save][cancel]
Overview of Lync Admin Center

In the **Organization** section, you can manage organization’s *General* settings and *External Communications*. NOTE: External Communications is where you can open you Lync communication to other outside of your organization.
Overview of Lync Admin Center

In the **Dial-In Conferencing** section, you can manage your provider, if you have one, or find a provider. If you have one, you can also manage which users use which providers and what their number and passcode is.

<table>
<thead>
<tr>
<th>Lync admin center</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>users</td>
<td>provider</td>
</tr>
<tr>
<td>organization</td>
<td>dial-in users</td>
</tr>
<tr>
<td></td>
<td>import and export users</td>
</tr>
<tr>
<td>dial-in conferencing</td>
<td>Meeting participants can join the audio portion of a meeting from a traditional telephone or mobile phone if dial-in conferencing is turned on when the meeting is scheduled. To configure dial-in conferencing, you must set up an account with a qualified Lync Online audio conferencing provider. <a href="#">Learn more</a></td>
</tr>
<tr>
<td>meeting invitation</td>
<td>Your audio conferencing provider will configure dial-in conferencing phone numbers and passcodes for users based on a list that you provide to them. Use the Export Wizard to export the list of users that you want to allow to set up meetings with dial-in conferencing. Use the Import Wizard to import user dial-in conferencing settings from the file you receive from your audio conferencing provider. <a href="#">Learn more</a> <a href="#">import wizard</a> <a href="#">export wizard</a></td>
</tr>
</tbody>
</table>
Overview of Lync Admin Center

In the Meeting Invitation section, you can customize your Lync meeting invite.

You can customize Lync meeting invitations to meet your organization's needs. You can add your own logo. You can replace the default URL for Lync meeting support with the URL of your organization’s support website if you have one. You can also add legal disclaimers by providing the link to a website with this information or by including the text directly in the meeting invitation.

Logo URL:

Help URL:

Legal URL:

Footer text:
Please call (760) 569-7171 and enter access code 438804601 when prompted.

save cancel
Overview of Exchange Admin Center

Admin Settings
Overview of Exchange Admin Center

The Exchange admin center (EAC) is the web-based management console you use to manage the items related to email that you can’t manage by using the Office 365 admin center. The EAC replaces the Exchange Control Panel (ECP), which was the interface used to manage your Exchange organization in the earlier releases of Exchange Online.
Overview of Exchange Admin Center

In the **Recipients** section, you can manage **Mailboxes, Groups, Resources, Contact, Shared, and Migration**.

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**Exchange admin center**

<table>
<thead>
<tr>
<th>recipients</th>
<th>mailboxes</th>
<th>groups</th>
<th>resources</th>
<th>contacts</th>
<th>shared</th>
<th>migration</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>DISPLAY NAME</th>
<th>MAILBOX TYPE</th>
<th>EMAIL ADDRESS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carter-McGowan Services</td>
<td>User</td>
<td><a href="mailto:emcgowan@cartermcgowanservices.com">emcgowan@cartermcgowanservices.com</a></td>
</tr>
<tr>
<td>Erik McGowan</td>
<td>User</td>
<td><a href="mailto:emcgowan@cartermcgowanservices.com">emcgowan@cartermcgowanservices.com</a></td>
</tr>
<tr>
<td>Jennifer Barnes</td>
<td>User</td>
<td><a href="mailto:jbarnes@cartermcgowanservices.com">jbarnes@cartermcgowanservices.com</a></td>
</tr>
<tr>
<td>Monica Campbell</td>
<td>User</td>
<td><a href="mailto:mcampbell@cartermcgowanservices.com">mcampbell@cartermcgowanservices.com</a></td>
</tr>
<tr>
<td>Nada Ravi</td>
<td>User</td>
<td><a href="mailto:nravi@cartermcgowanservices.com">nravi@cartermcgowanservices.com</a></td>
</tr>
<tr>
<td>Natasha Harris</td>
<td>User</td>
<td><a href="mailto:nharris@cartermcgowanservices.com">nharris@cartermcgowanservices.com</a></td>
</tr>
<tr>
<td>Nikkie Carter</td>
<td>User</td>
<td><a href="mailto:ncarter@cartermcgowanservices.com">ncarter@cartermcgowanservices.com</a></td>
</tr>
<tr>
<td>TenantReductionUserExperienceMonitoringUser</td>
<td>User</td>
<td><a href="mailto:TenantReductionUserExperienceMonitoringUser@cartermcgowanservices.com">TenantReductionUserExperienceMonitoringUser@cartermcgowanservices.com</a></td>
</tr>
<tr>
<td>Test Owner</td>
<td>User</td>
<td><a href="mailto:testowner@cartermcgowanservices.com">testowner@cartermcgowanservices.com</a></td>
</tr>
<tr>
<td>Timothy Barnes</td>
<td>User</td>
<td><a href="mailto:tbarnes@cartermcgowanservices.com">tbarnes@cartermcgowanservices.com</a></td>
</tr>
<tr>
<td>Vicki McGowan-Smith</td>
<td>User</td>
<td><a href="mailto:vmcgowsmith@cartermcgowanservices.com">vmcgowsmith@cartermcgowanservices.com</a></td>
</tr>
</tbody>
</table>

1 selected of 11 total

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In the **Permissions** section, you can manage *Admin Roles*, *User Roles*, and *Outlook Web App Policies*. 

---

**Exchange admin center**

<table>
<thead>
<tr>
<th>admin roles</th>
<th>user roles</th>
<th>Outlook Web App policies</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>permissions</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>recipients</td>
<td></td>
<td></td>
</tr>
<tr>
<td>compliance management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>organization</td>
<td></td>
<td></td>
</tr>
<tr>
<td>protection</td>
<td></td>
<td></td>
</tr>
<tr>
<td>mail flow</td>
<td></td>
<td></td>
</tr>
<tr>
<td>mobile</td>
<td></td>
<td></td>
</tr>
<tr>
<td>public folders</td>
<td></td>
<td></td>
</tr>
<tr>
<td>unified messaging</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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**AdminAgents_J95d9**

- Compliance Management
- Discovery Management
- Help Desk
- HelpdeskAdmins_fK81G
- HelpdeskAgents_5e7800
- Hygiene Management
- Organization Management
- Recipient Management
- Records Management
- RIM-MailboxAdminsae9F7a0a33a3ee4aeeb09a1272c95c0216
- TenantAdmins_0d175
- UIM Management
- View-Only Organization Management  

---

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In the **Compliance Management** section, you can manage *In-Place eDiscovery & Hold*, *Auditing*, *Data Loss Prevention*, *Retention Policies*, *Retention Tags*, and *Journal Rules*. 

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**Exchange admin center**

- recipients
  - permissions
  - [compliance management](#)
  - organization
  - protection
  - mail flow
  - mobile
  - public folders
  - unified messaging

---

### in-place eDiscovery & hold  auditing  data loss prevention  retention policies  retention tags  journal rules

Search the mailboxes in your organization for email and other message types that contain specific keywords. You can create a new search, or edit and restart an existing one. To update the search list, click Refresh below.

<table>
<thead>
<tr>
<th>NAME</th>
<th>HOLD STATUS</th>
<th>MODIFIED DATE</th>
<th>CREATED BY</th>
</tr>
</thead>
</table>

There are no items to show in this view.
In the **Organization** section, you can manage **Sharing** and **Apps**.

### Exchange admin center

<table>
<thead>
<tr>
<th>recipients</th>
<th>permissions</th>
<th>compliance management</th>
<th><strong>organization</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>protection</td>
<td>mail flow</td>
<td>mobile</td>
<td>public folders</td>
</tr>
</tbody>
</table>

#### Sharing

**Organization Sharing**

Enable free/busy and other calendar information sharing between federated Exchange organizations. [Learn more](#)

<table>
<thead>
<tr>
<th>ON</th>
<th>NAME</th>
<th>DOMAINS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

There are no items to show in this view.

#### Individual Sharing

Allow users to share calendar information and contacts with external organizations. [Learn more](#)

<table>
<thead>
<tr>
<th>ON</th>
<th>NAME</th>
<th>DOMAINS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

0 selected of 0 total

[Default Sharing Policy (DEFAULT)](#) Sharing with all domains; Anonymous
In the **Protection** section, you can manage *Malware Filter, Connection Filter, Content Filter, Outbound Spam*, and *Quarantine*.
Overview of Exchange Admin Center

In the **Mail Flow** section, you can manage **Rules, Delivery Reports, Message Trace, Accepted Domains**, and **Connectors**.

![Exchange admin center](image)
In the **Mobile** section, you can manage *Mobile Device Access* and *Mobile Device Mailbox Policies.*
In the **Public Folders** section, you can manage *Public Folders* and *Public Folder Mailboxes*.

### Exchange admin center

<table>
<thead>
<tr>
<th>recipients</th>
<th>permissions</th>
<th>compliance management</th>
<th>organization</th>
<th>protection</th>
<th>mail flow</th>
<th>mobile</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>public folders</strong></td>
<td><strong>public folder mailboxes</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

No public folders exist in this organization. Before you create a public folder, please make sure that you created at least one public folder mailbox. To create a public folder, click Add →. After you create the public folder, you’ll need to assign permissions so users can access it and create subfolders.
In the **Unified Messaging** section, you can manage *UM Dial Plans* and *UM IP Gateways*.

**UM dial plans**

Unified Messaging dial plans define the format for telephone numbers in your organization. For UM to answer calls for your users, you have to set up at least one dial plan. *Learn more*

<table>
<thead>
<tr>
<th>NAME</th>
<th>EXTENSION LENGTH</th>
<th>URI TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

There are no items to show in this view.
Overview of SharePoint Admin Center

Admin Settings
Overview of SharePoint Admin Center

SharePoint Online provides a collection of web-based tools and technologies that help you store, share, and manage digital information within your organization when you use Office 365. This hosted service is ideal for working on projects, storing data and documents in a central location, and sharing information with others. SharePoint sites can help members of your organization work more efficiently and productively.
Overview of SharePoint Admin Center

In the **Site Collections** section, you can manage your site collections as well as make new one, buy more space, set site collection administrators, and so on.
Overview of SharePoint Admin Center

In the **One Drive for Business** section, you can manage One Drive storage limits.

<table>
<thead>
<tr>
<th>SharePoint admin center</th>
<th>set OneDrive for Business storage limits</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><a href="https://cartermcgowanservices-my.sharepoint.com/personal">https://cartermcgowanservices-my.sharepoint.com/personal</a></td>
</tr>
<tr>
<td>Change the OneDrive for Business storage limit for individual users.</td>
<td></td>
</tr>
<tr>
<td>Current tenant storage allocation</td>
<td>131.93 GB available of 139.79 GB</td>
</tr>
<tr>
<td>Enter names or email addresses for the accounts you want to change:</td>
<td></td>
</tr>
<tr>
<td>Enter names or email addresses</td>
<td></td>
</tr>
<tr>
<td>Change storage limit to:</td>
<td>25 GB</td>
</tr>
<tr>
<td>Click save to apply changes to the selected users.</td>
<td></td>
</tr>
</tbody>
</table>

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In the **InfoPath** section, you can manage settings for InfoPath such as allowing the forms to be browser enabled.
Overview of SharePoint Admin Center

In the **User Profiles** section, you can manage People, Organization, and *My Site* settings.

SharePoint admin center

- **People**
  - Manage User Properties
  - Manage User Profiles
  - Manage User Sub-types
  - Manage Audiences
  - Manage User Permissions
  - Manage Policies

- **Organizations**
  - Manage Organization Properties
  - Manage Organization Profiles
  - Manage Organization Sub-types

- **My Site Settings**
  - Setup My Sites
  - Configure Trusted Host Locations
  - Manage Promoted Sites
  - Publish Links to Office Client Applications
  - Manage Social Tags and Notes

Profiles
- Number of User Profiles: 42
- Number of User Properties: 100
- Number of Organization Profiles: 1
- Number of Organization Properties: 15

Audiences
- Number of Audiences: 1
- Uncompleted Audiences: 0
- Audience Compilation Status: Idle
  - Ended at: 3/14/2014 6:01 AM

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Overview of SharePoint Admin Center

In the BCS section, you can manage BCS and Connection Settings for Apps settings.

<table>
<thead>
<tr>
<th>SharePoint admin center</th>
<th>business connectivity services</th>
</tr>
</thead>
<tbody>
<tr>
<td>site collections</td>
<td></td>
</tr>
<tr>
<td>OneDrive for Business</td>
<td></td>
</tr>
<tr>
<td>infopath</td>
<td>Manage BDC Models and External Content Types Manage External Content Types that are not restricted to an App. These can be used on any site.</td>
</tr>
<tr>
<td>user profiles</td>
<td>connection settings for apps</td>
</tr>
<tr>
<td>bcs</td>
<td>Manage connections to online services Manage connection settings to online OData services. You can configure Apps to use these connections.</td>
</tr>
<tr>
<td>term store</td>
<td>Manage connections to on-premises services Manage connection settings to OData services that are on-premises. You can configure Apps to use these connections.</td>
</tr>
<tr>
<td>records management</td>
<td></td>
</tr>
<tr>
<td>search</td>
<td></td>
</tr>
<tr>
<td>secure store</td>
<td></td>
</tr>
<tr>
<td>apps</td>
<td></td>
</tr>
<tr>
<td>settings</td>
<td></td>
</tr>
</tbody>
</table>
In the **Term Store** section, you can manage settings such as *Term Store Administrators* and *Working Languages*.
In the **Records Management** section, you can manage *Send to Connections* and *Connection Settings*. 

**Send To Connections**

Send To Connections allow content to be submitted to sites with a configured Content Organizer. Send To connections will appear as locations that content can be submitted to when configuring Information Management Policy. Optionally, you can make Send To Connections available for users to manually submit content.

**Connection Settings**

Each connection requires a display name and a URL to a content organizer. Optionally, this connection can be made available as a Send To option on the item's drop-down menu and on the ribbon.
Overview of SharePoint Admin Center

In the **Search** section, you can administer search settings such as schemas queries, and the crawl log.

---

**SharePoint admin center**

<table>
<thead>
<tr>
<th>Search administration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Search Schemas</td>
</tr>
<tr>
<td>Manage Search Dictionaries</td>
</tr>
<tr>
<td>Manage Authority and Pages</td>
</tr>
</tbody>
</table>

**Search Settings**

- **Manage Authority and Pages**
  - Identify high-quality pages that search will use to improve relevance, as well as low-quality pages that search will consider less relevant.
  - **Query Suggestion Settings**
    - Show search suggestions as users type in the search box (if not disabled by user).

- **Manage Result Sources**
  - Create and modify sources you can query for results. This includes filtered results from SharePoint as well as results from remote sources such as Bing.

- **Manage Query Rules**
  - Create and modify query rules to promote important results, show blocks of additional results, and fine-tune ranking.

- **Manage Query Client Types**
  - Create and modify configurations of query client types which are used to identify querying clients so as to prioritize query settings.

- **Remove Search Results**
  - List URLs you would like to remove from search results until the next crawl.

- **View Usage Reports**
  - See how often your users search, what their top queries are, and which queries they’re having trouble getting answers for.

- **Search Center Settings**
  - Tell us where searches should go by specifying the location of your Search Center.

- **Export Search Configuration**
  - Create a file that includes all customized query rules, result sources, result types, ranking models and site search settings but not any that shipped with SharePoint, in the current tenant, that can be imported to other tenants.

- **Import Search Configuration**
  - Import a search configuration file.

- **Crawl Log Permissions**
  - Grant users read access to crawl log information for this tenant.
Overview of SharePoint Admin Center

In the Secure Store section, you can manage your secure store target applications.

SharePoint admin center

site collections
OneDrive for Business
infopath
user profiles
bts
term store
records management
search
secure store
apps
settings

There are no Secure Store Target Applications in this Secure Store Service Application. You can create a new Target Application from the Manage Target Applications group in the Edit ribbon group.
In the **Apps** section, you can manage settings such as the app catalog and app permissions.  

<table>
<thead>
<tr>
<th>SharePoint admin center</th>
<th>apps</th>
</tr>
</thead>
</table>
| site collections        | App Catalog  
Make apps available to your organization and manage requests for apps. |
| OneDrive for Business   | Purchase Apps  
Purchase apps from the SharePoint Store. |
| infopath                | Manage Licenses  
Manage licenses for apps purchased from the SharePoint Store. |
| user profiles           | Configure Store Settings  
Manage app acquisition settings. |
| bcs                     | Monitor Apps  
Track usage of applications and review errors. |
| term store              | App Permissions  
Manage app access to this tenant. |
| records management      | settings |
| search                  |      |
| secure store            |      |
Overview of SharePoint Admin Center

In the **Settings** section, you can manage settings such as Yammer integration and IRM.
Other Tips

• Layer your experience. Learn from an end user then a power user side so that you know what things look like from a user prospective.

• Stay in the Know. Technology changes are rapid and speeding up. Try to read and learn as much as you can. Learn to roll with the punches or be knocked out by them.

• Understand the business side. Know the processes and the reasons why they are done. Makes you more valuable and you will be able to suggest changes that make sense for your organization. Also, you will know why people are doing what they are doing.
Questions?
Contact Information

Carter-McGowan Services, LLC
Toll-free/fax: (866) 721-6085
Local: (540) 693-0578
Email: service@cartermcgowanservices.com

SharePoint Online Trial with Office 365:
http://ow.ly/HAzZs

Web: www.cartermcgowanservices.com
Twitter: @CarterMcGServ
FaceBook: CarterMcGowan
Google+: Carter-McGowan Services
LinkedIn: NikkiaTCarter

## Overview of Lync Admin Center

### Lync Online organization settings

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default</th>
<th>Learn more</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domain federation</td>
<td>Communicate with other organizations that use Lync</td>
<td>Enabled</td>
<td><a href="#">Configure external communications</a></td>
</tr>
<tr>
<td>Public IM connectivity</td>
<td>Communicate with Skype users</td>
<td>Enabled</td>
<td><a href="#">Configure external communications</a></td>
</tr>
<tr>
<td>Mobile phone notifications</td>
<td>Choose a push notification service for Windows Phone, iPhone, and iPad, or disable notifications</td>
<td>Microsoft Push Notification Service and Apple Push Notification Service</td>
<td><a href="#">Configure mobile phone notifications</a></td>
</tr>
<tr>
<td>Presence privacy mode</td>
<td>Determine who can view a Lync user’s presence status</td>
<td>Automatically display presence information</td>
<td><a href="#">Configure presence privacy mode</a></td>
</tr>
<tr>
<td>Meeting invitation</td>
<td>Add your own logo and footer; add links to help and legal information</td>
<td>Not configured</td>
<td><a href="#">Customize meeting invitations</a></td>
</tr>
</tbody>
</table>

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### Overview of Lync Admin Center

#### Lync Online user settings

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default</th>
<th>Learn more</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audio and video</td>
<td>Conduct audio and video conversations using Lync</td>
<td>Enabled</td>
<td><a href="#">Configure settings for individual users</a></td>
</tr>
<tr>
<td>Recording</td>
<td>Record calls and meetings</td>
<td>Enabled</td>
<td><a href="#">Configure settings for individual users</a></td>
</tr>
<tr>
<td>Anonymous attendee</td>
<td>Allow anonymous Lync Meeting attendees to connect by having the audio conferencing provider call them</td>
<td>Enabled</td>
<td><a href="#">Configure settings for individual users</a></td>
</tr>
</tbody>
</table>
| Disable non-archived     | Turns off features that aren’t captured when the organization has set up an in-place hold in the Exchange admin center:  
  • File transfer using instant messaging  
  • Shared OneNote pages  
  • PowerPoint annotations  
  Select this option if you’re legally required to preserve electronically stored information. | Disabled| [Configure settings for individual users](#)                                                           |