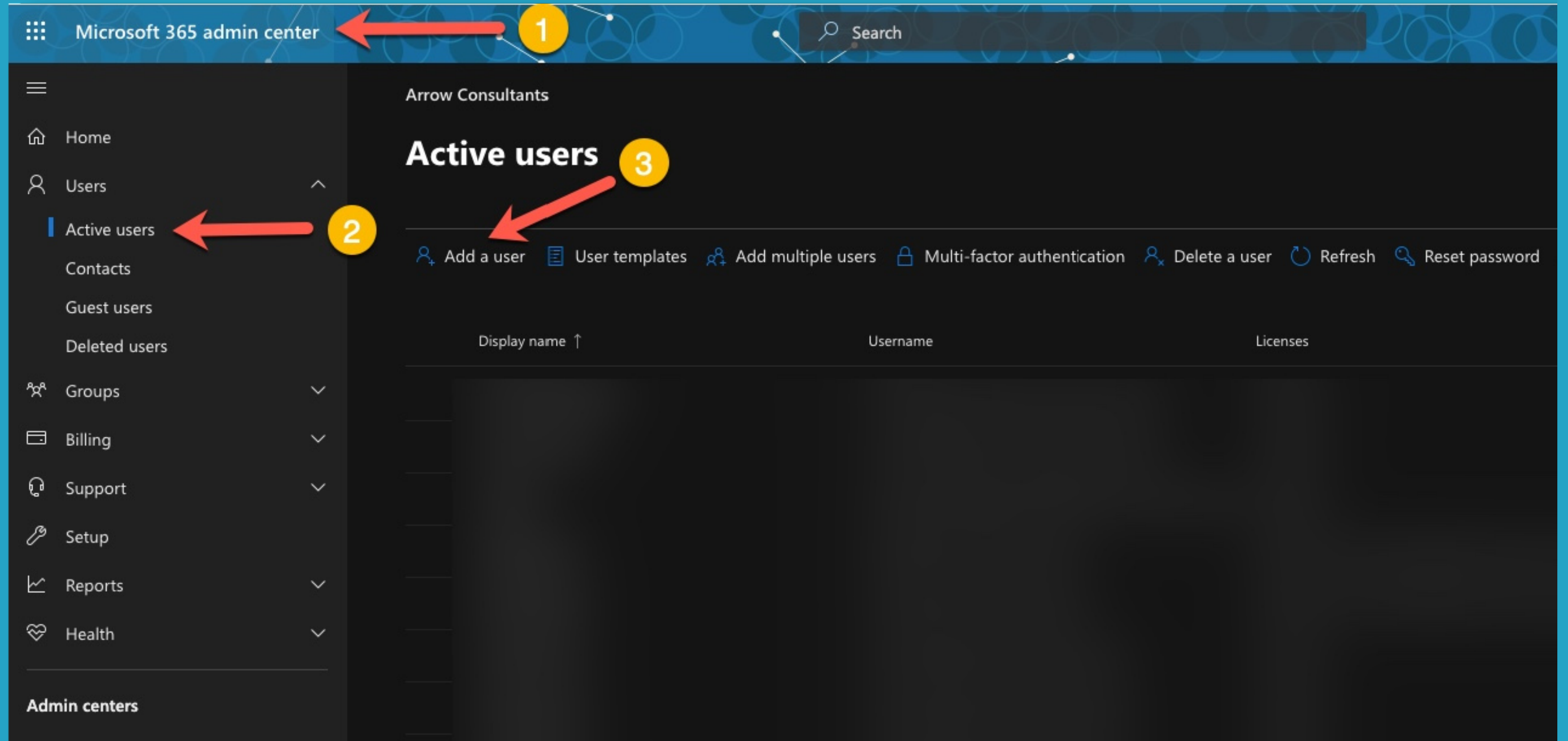


MICROSOFT 365 QUICK TUTORIAL

HOW TO ADD A USER & ASSIGN A ROLE

Arrow Consultants, LLC

STEP 1



Navigate to your Admin Center, Click on Users, Click on Active Users, Click on Add a User

STEP 2

Microsoft 365 admin center

Search

Home

Users

Active users

Contacts

Guest users

Deleted users

Groups

Billing

Support

Setup

Reports

Health

Admin centers

Security

Compliance

Azure Active Directory

All admin centers

Show all

Arrow Consultants

Add a user

Basics

Product licenses

Optional settings

Finish

Set up the basics

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

First name

Last name

Display name *

Username *

Domains

@ arrowconsultants.solutions

☒ Automatically create a password

☐ Require this user to change their password when they first sign in

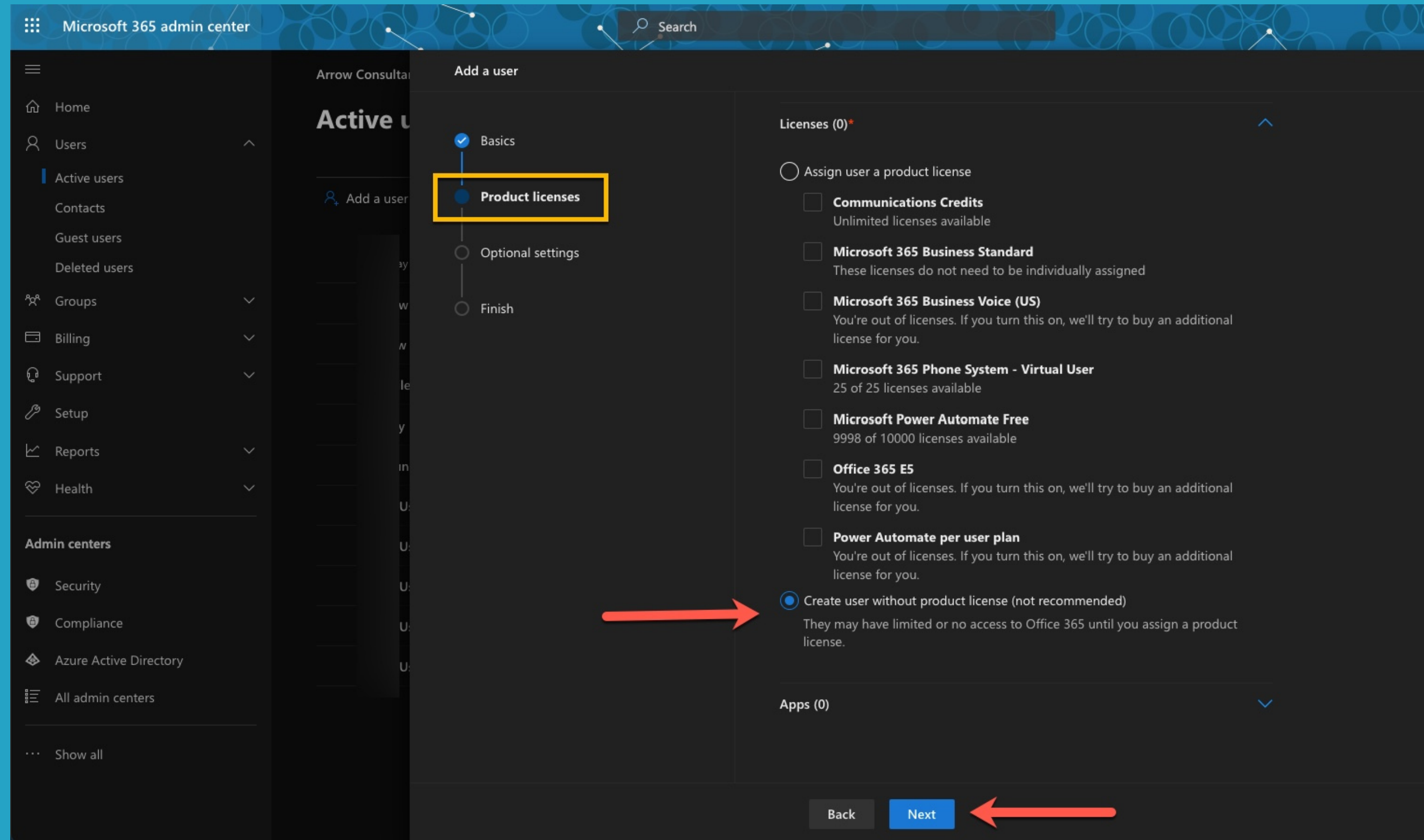
☐ Send password in email upon completion

Next



Enter User's Name, Enter Username, Check Boxes (if needed), Click Next

STEP 3



Assign a License, Add Apps (if needed), and Click Next.

STEP 4

The screenshot shows the 'Add a user' wizard in the Microsoft 365 admin center. The left sidebar contains navigation links: Home, Users, Active users, Contacts, Guest users, Deleted users, Groups, Billing, Support, Setup, Reports, Health, Admin centers (Security, Compliance, Azure Active Directory, All admin centers), and Show all. The main content area is titled 'Add a user' and shows a progress bar with four steps: Basics, Product licenses, Optional settings (highlighted with a yellow box), and Finish. The 'Optional settings' section is active and contains a dropdown menu for 'Roles (User: no administration access)' with a red arrow pointing to the dropdown arrow. Below this is a 'Profile info' section. At the bottom, there are 'Back', 'Next', and 'Cancel' buttons.



Chose the Role for the User by clicking the dropdown menu button.

STEP 5

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Optional settings

You can choose what role you'd like to assign for this user, and fill in additional profile information.

Roles

Admin roles give users permission to view data and complete tasks in admin centers. Give users only the access they need by assigning the least-permissive role.

[Learn more about admin roles](#)

☐ User (no admin center access)

☒ Admin center access

Global readers have read-only access to admin centers, while Global admins have unlimited access to edit all settings. Users assigned other roles are more limited in what they can see and do.

☐ Exchange Administrator ⓘ

☒ Global Administrator ⓘ

☐ Global reader ⓘ

☐ Helpdesk admin ⓘ

☐ Service support admin ⓘ

☐ SharePoint Administrator ⓘ

☐ Teams Administrator ⓘ

☐ User Administrator ⓘ

Back Next Cancel



Set the permissions for the new user and click next.

STEP 6

The screenshot shows the 'Add a user' wizard in the Microsoft 365 admin center. The left sidebar contains navigation links: Home, Users, Active users, Contacts, Guest users, Deleted users, Groups, Billing, Support, Setup, Reports, and Health. Below these are 'Admin centers' links: Security, Compliance, Azure Active Directory, and All admin centers. The main content area is titled 'Add a user' and shows a progress bar with four steps: Basics, Product licenses, Optional settings, and Finish. The 'Finish' step is highlighted with a yellow box. The 'Review and finish' section displays the user's details: Jane Doe, Jane@arrowconsultants.solutions, and a list of assigned settings including Display and username, Password, Product licenses, Roles (default), and Profile info. A red arrow points to the 'Finish adding' button at the bottom right.

Microsoft 365 admin center

Search

Arrow Consultants

Add a user

Active users

Home

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Show all

Basics

Product licenses

Optional settings

Finish

Review and finish

Assigned Settings

Review all the info and settings for this user before you finish adding them.

Display and username

Jane Doe

Jane@arrowconsultants.solutions

Edit

Password

Type: Auto-generated

Edit

Product licenses

Create user without product license.

Edit

Roles (default)

User (no admin center access)

Edit

Profile info

None provided

Edit

Back

Finish adding

Cancel



Review details and click finish.

MICROSOFT 365 QUICK TUTORIAL

WELL DONE!

Great Job

Need to make an appointment?



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Misty Murray

Your Creator & Trainer