

Office 365 Manager User Guide

Specmasoft Office 365 Manager is a desktop-based tool. This app supports extensively pre-configured reports and management actions to manage Office 365 and Azure AD services. The app is powered by Microsoft Graph API and Windows PowerShell.

Key Features

- Extensively pre-configured reports
- Actionable reports with inline report actions
- Bulk Administration using CSV
- Can manage multiple Office 365 tenants from a single UI
- Multiple report views in same page.
- Customize Report Columns
- Export and Email Reports in different formats (Excel, CSV, and PDF)
- Automatic Schedule Reports
- Automatic Backup
- Intuitive and easy to use user interface (UI)
- Work with MFA enabled account

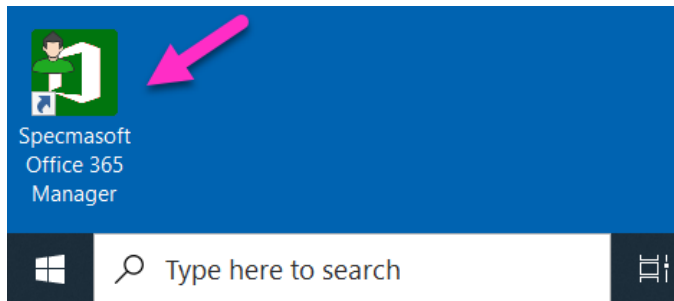
1. How to Download and Install the App

You can easily download the application setup file from the below [link](https://specmasoft.com/download-office-365-manager) and install the setup by following the simple steps. The setup is same for the free version and licensed version. Once you have installed the setup, the app will work for 15 days free trial with complete premium features. You can explore and evaluate all the premium features without any trial restrictions, you can go for licensed version once you are happy with the app.

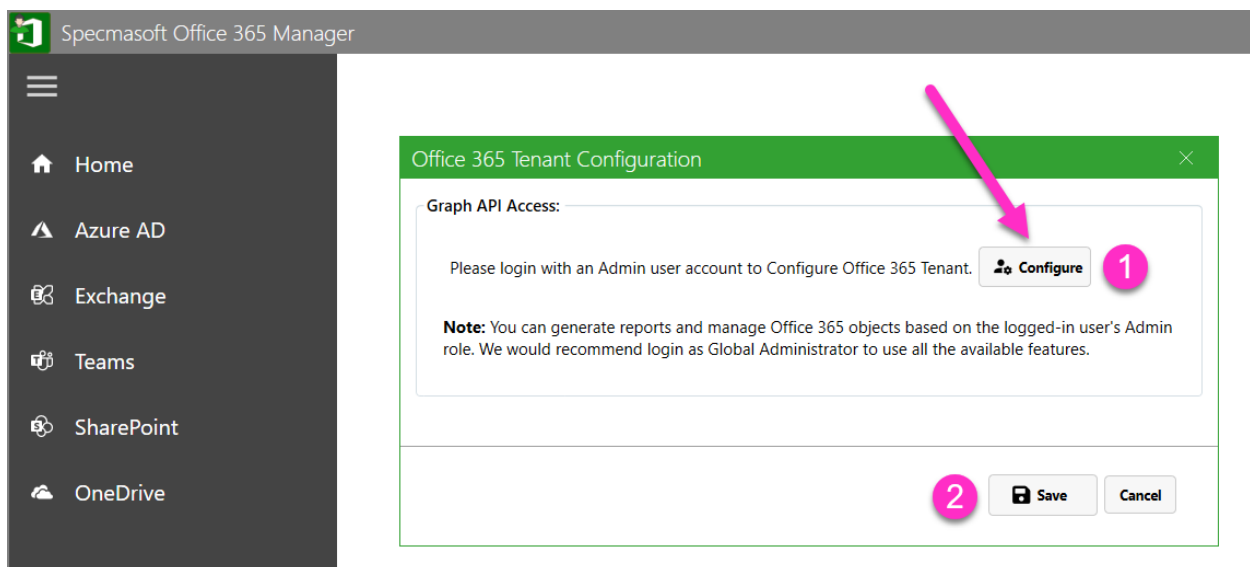
Download link: <https://specmasoft.com/download-office-365-manager>

2. How to Start and Configure the Application

Once you have completed the app installation, you can open the app either from the Start menu or Desktop shortcut. You can find the shortcut with the name **Specmasoft Office 365 Manager**.



When you open the app for the first time, the Office 365 Tenant configuration window prompts you to configure the tenant that you want to manage and generate reports. Click the **Configure** button to sign-in, you can sign-in with your Admin user account which has enough permissions to manage the Office 365 services. After the successful sign-in, click the **Save** button to add the first Office 365 tenant scope to manage.

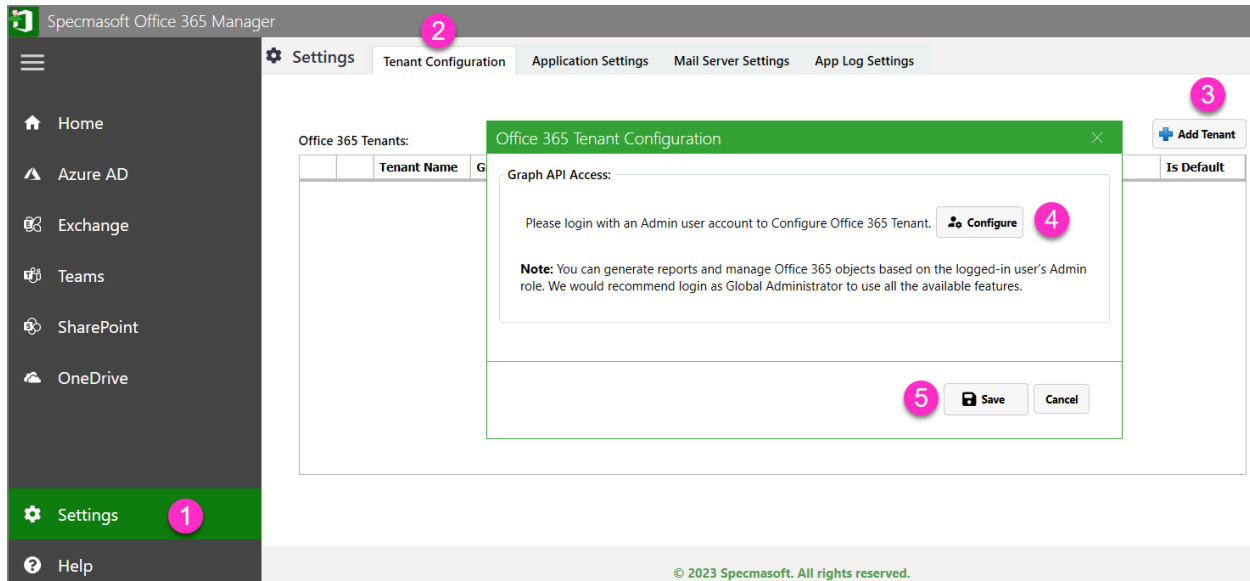


3. How to add Office 365 Tenant Scope

To manage and generate reports for an Office 365 Tenant, first, you must add an Office 365 Tenant scope in Tenant Configuration. When you open the app first time, the app will prompt you to add your first scope, please follow the below steps if you have not added the scope or if you want to add more tenant scopes to manage.

- Go to **Settings** page -> **Tenant Configuration**
- Click the **Add Tenant** button in the top-right, this will a open pop-up window to configure a new Office 365 tenant.

- In **Office 365 Tenant Configuration** window, click the **Configure** button and you will be asked to sign-in with your Office 365 user credentials, sign-in with your Admin user account who has enough permissions to manage the Office 365 services.
- Finally, click the **Save** button to add the new Tenant scope.



4. Permissions Required

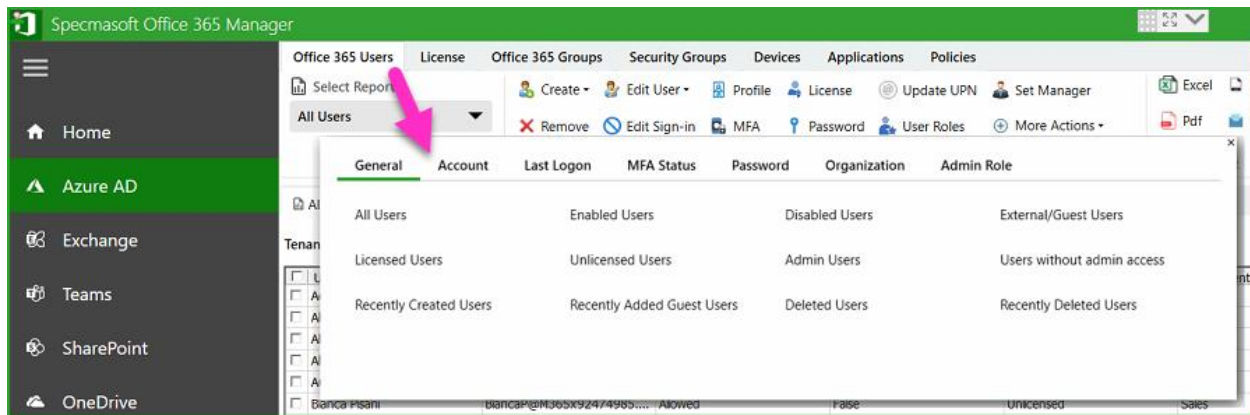
You can generate reports and manage Office 365 objects based on the logged-in user's Admin role. We would recommend login as Global Administrator to use all the available features.

5. Reports

Once you have successfully added your Office 365 Tenant scope, you can easily generate reports either from Home page or from specific service page such as Azure AD.

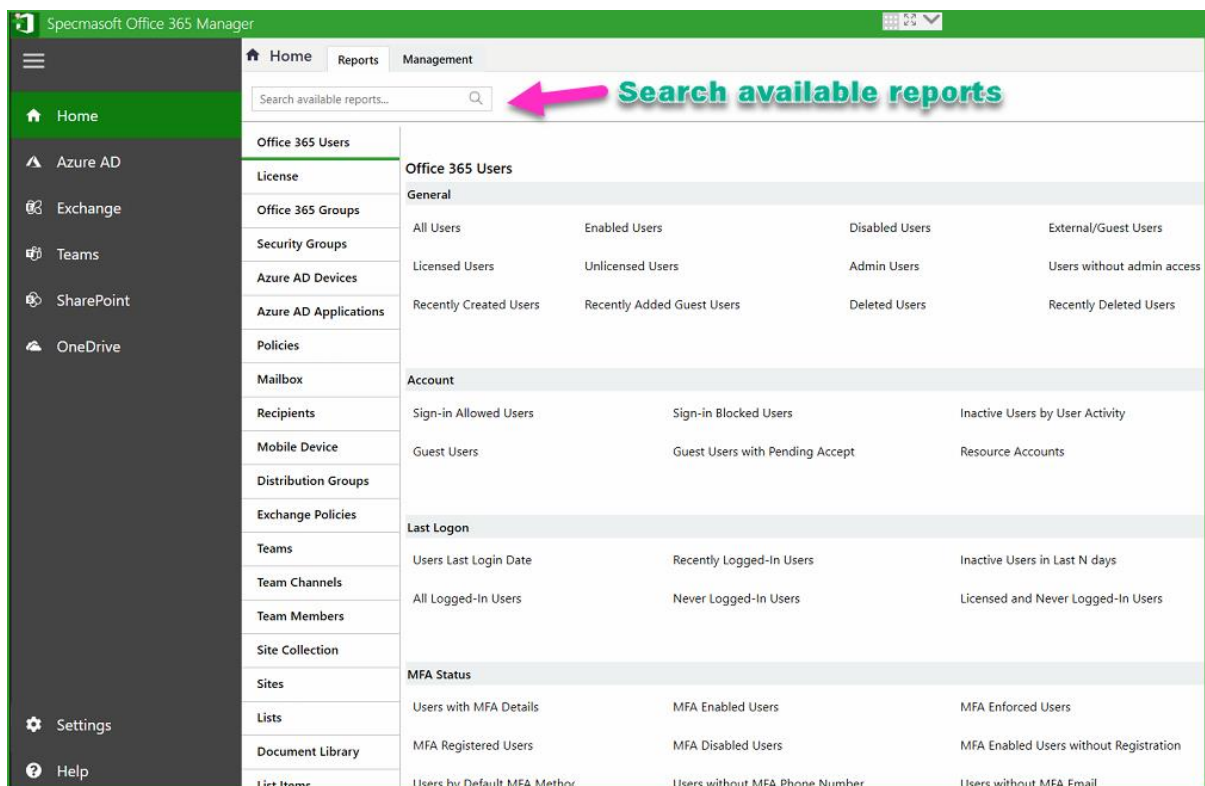
5.1. Generate Report from Service Page

The app displays supported service features such as Azure AD on different pages. In every page, the reports and management actions will be categorized and displayed under different ribbon tabs. When you navigate into the service page, the app auto-generate and displays the default report for the specific tab. You can see and generate more reports by clicking the **Select Report** button inside the **Reports** section of the ribbon tab. Please refer to the below image.



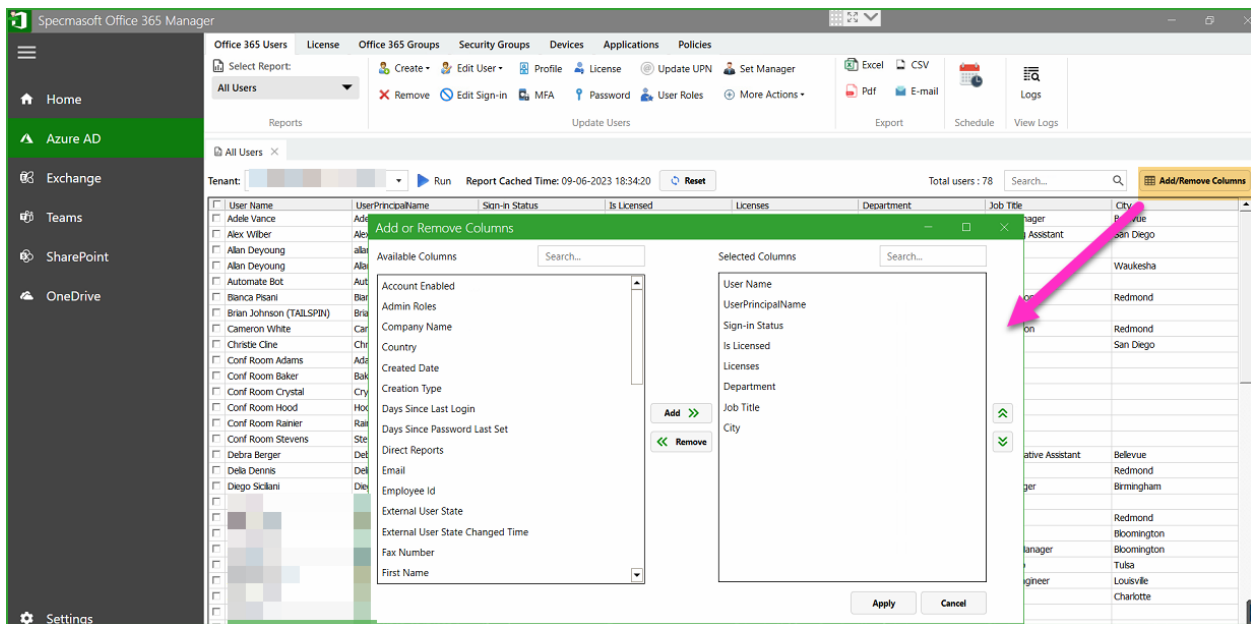
5.2. Generate Report from Home Page

Generating reports from the service page is an easy task, but you cannot search for all the available reports from the reports popup. From Home page, you can easily search all the available reports from all supported services with a different set of keywords. Once you find the required report, simply click on the report to generate the report in service page. Please refer to the below image.



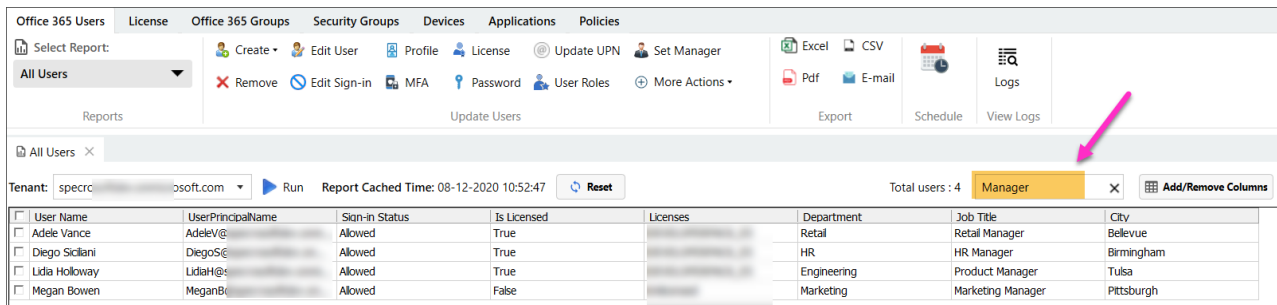
5.3. Customize Report Columns

When you generate a report, the report view will be populated with default columns. You can easily add more columns or remove existing columns by clicking **Add/Remove Columns** button in the report view.



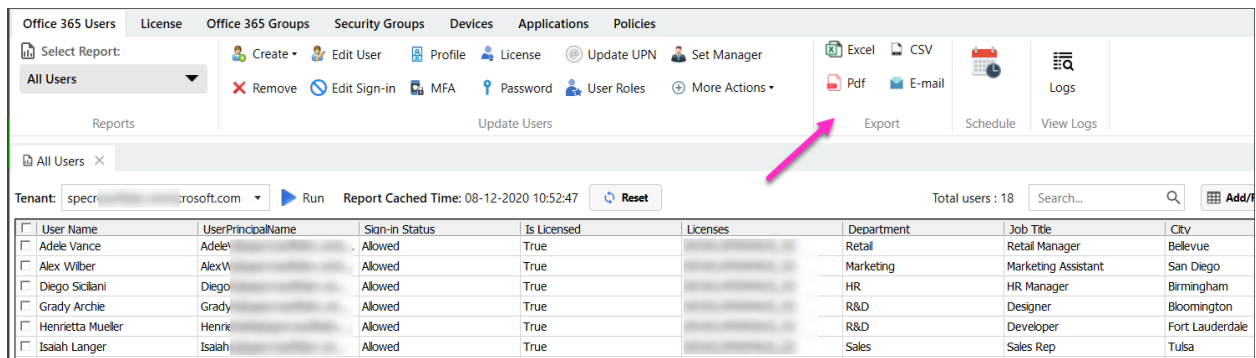
5.4. Search and Filter Report

You can generate different build-in reports to extract information for the same object type (ex: Azure AD User). In some cases, you may need more granular data from the generated report. For now, you can use the inline search feature to filter the generated report. We planned to support advanced level filter in the future.



5.5. Export and E-mail Reports

From the report view, you can easily export or email all report data or selected rows. Export reports currently supported in the following formats: Excel, CSV, and PDF.



Office 365 Users | License | Office 365 Groups | Security Groups | Devices | Applications | Policies

Select Report: All Users

Reports | Update Users

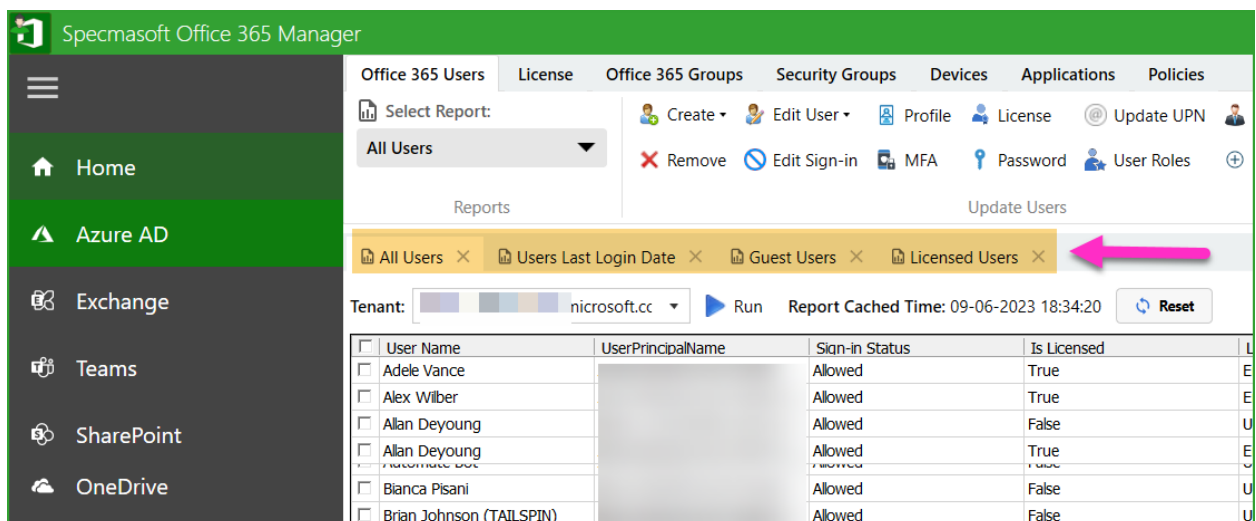
Tenant: specmasoft.com | Run | Report Cached Time: 08-12-2020 10:52:47 | Reset

Total users : 18 | Search... | Add/Remove

User Name	UserPrincipalName	Sign-in Status	Is Licensed	Licenses	Department	Job Title	City
<input type="checkbox"/> Adele Vance	AdeleV	Allowed	True		Retail	Retail Manager	Bellevue
<input type="checkbox"/> Alex Wilber	AlexW	Allowed	True		Marketing	Marketing Assistant	San Diego
<input type="checkbox"/> Diego Siciliani	DiegoS	Allowed	True		HR	HR Manager	Birmingham
<input type="checkbox"/> Grady Archie	GradyA	Allowed	True		R&D	Designer	Bloomington
<input type="checkbox"/> Henrietta Mueller	HenriM	Allowed	True		R&D	Developer	Fort Lauderdale
<input type="checkbox"/> Isaiah Langer	IsaiahL	Allowed	True		Sales	Sales Rep	Tulsa

5.6. Multiple report views in same window

You can generate multiple report views for the same report or different reports. For each report generation, a new report view will be created. If you are managing multiple Office 365 tenants, you can also generate two views for the same report, but different tenants.



Specmasoft Office 365 Manager

Office 365 Users | License | Office 365 Groups | Security Groups | Devices | Applications | Policies

Select Report: All Users

Reports | Update Users

Tenant: nicrosoft.cc | Run | Report Cached Time: 09-06-2023 18:34:20 | Reset

Home | Azure AD | Exchange | Teams | SharePoint | OneDrive

All Users | Users Last Login Date | Guest Users | Licensed Users

User Name	UserPrincipalName	Sign-in Status	Is Licensed
<input type="checkbox"/> Adele Vance		Allowed	True
<input type="checkbox"/> Alex Wilber		Allowed	True
<input type="checkbox"/> Allan Deyoung		Allowed	False
<input type="checkbox"/> Allan Deyoung		Allowed	True
<input type="checkbox"/> Bianca Pisani		Allowed	False
<input type="checkbox"/> Brian Johnson (TAILSPIN)		Allowed	False

5.7. Reset cached report data

When you generate a report for the first time, the report data will be fetched from Office 365 and stored in the local application database. For further report generation, the data will be fetched from the cached source. The cached source will be automatically reset when you generate report after some time interval. You can configure this interval from **Settings** page -> **Application Settings**. Click the **Reset** button as shown in below image if you want to reset the report data immediately from report view.

Office 365 Users | License | Office 365 Groups | Security Groups | Devices | Applications | Policies

Select Report: All Users

Reports | Update Users

Tenant: spe...com | Run | Report Cached Time: 08-12-2020 10:52:47 | Reset

User Name	UserPrincipalName	Sign-in Status	Is Licensed	Licenses
<input type="checkbox"/> Adele Vance	AdeleV...	Allowed	True	
<input type="checkbox"/> Alex Wilber	AlexW...	Allowed	True	
<input type="checkbox"/> Diego Sicilani	DiegoS...	Allowed	True	
<input type="checkbox"/> Grady Archie	GradyA...	Allowed	True	
<input type="checkbox"/> Henrietta Mueller	Henriet...	Allowed	True	
<input type="checkbox"/> Isaiah Langer	IsaiahL...	Allowed	True	

6. Management

You can easily run management tasks from inline report actions which are available as ribbon menu items over the top of the report view.

6.1. Run management actions from report view

From the report view, you can select the required objects (ex: users) and execute the desired action. The action will make the required changes in the selected objects alone. If you do not select any objects from the report view, then the action will prompt you to select the desired objects. Apart from accessing actions from the ribbon menu, you can also view the actions menu by right-clicking over the report grid.

Specmasoft Office 365 Manager

Office 365 Users | License | Office 365 Groups | Security Groups | Devices | Applications | Policies

Select Report: All Users

Reports | Update Users

Tenant: spe...com | Run | Report Cached Time: 08-12-2020 10:52:47 | Reset

User Name	UserPrincipalName	Sign-in Status	Is Licensed	Licenses
<input checked="" type="checkbox"/> Adele Vance	AdeleV...	Allowed	True	
<input checked="" type="checkbox"/> Alex Wilber	AlexW...	Allowed	True	
<input checked="" type="checkbox"/> Diego Sicilani	DiegoS...	Allowed	True	
<input checked="" type="checkbox"/> Grady Archie	GradyA...	Allowed	True	
<input type="checkbox"/> Henrietta Mueller	Henriet...	Allowed	True	
<input type="checkbox"/> Isaiah Langer	IsaiahL...	Allowed	True	
<input type="checkbox"/> Johanna Lorenz	Johanna...	Allowed	True	
<input type="checkbox"/> Joni Sherman	JoniS...	Allowed	True	
<input type="checkbox"/> Kevin Morgan	KevinM...	Allowed	True	
<input type="checkbox"/> Lee Gu	LeeG...	Allowed	True	
<input type="checkbox"/> Lidia Holloway	LidiaH...	Allowed	True	
<input type="checkbox"/> Lynne Robbins	LynneR...	Allowed	True	
<input type="checkbox"/> Mahes Morgan	MahesM...	Allowed	True	
<input type="checkbox"/> Megan Bowen	MeganB...	Allowed	False	

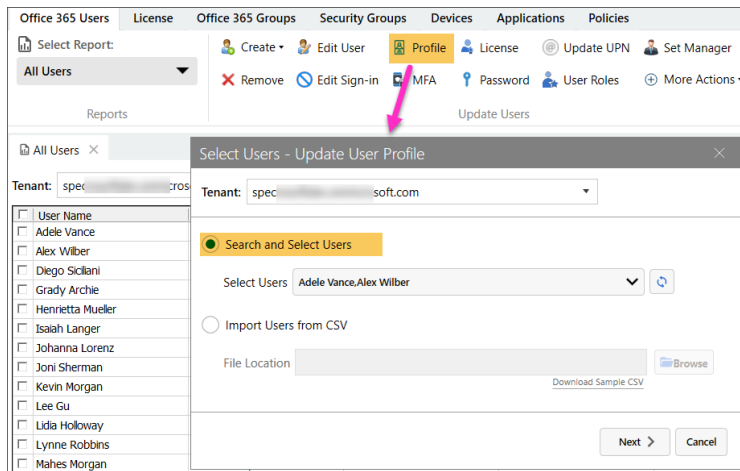
Context Menu Actions:

- Edit User
- Update Profile
- Update License
- Update Sign-in Access
- Update UPN
- Update MFA Settings
- Update User Roles
- Update Manager
- Reset Password
- Revoke Sign In Sessions
- Delete User

Note: Double-click action supported to manage some of the object types. In the Azure AD users report, the double-click on the desired row in the report grid will open the Edit User action.

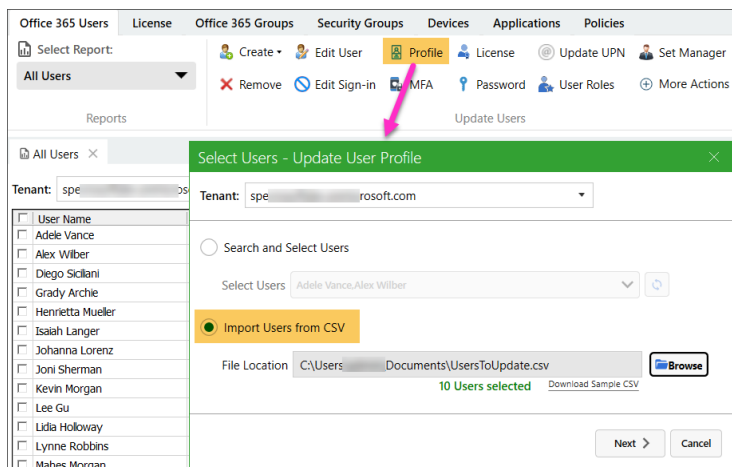
6.2. Search and Select Objects to run actions

If you do not want to select action objects from the report grid or if you do not find required objects in the generated report, then simply click on the required action without selecting any objects, the action process will prompt you to select the desired objects. Now you can search and select required objects and execute the action.



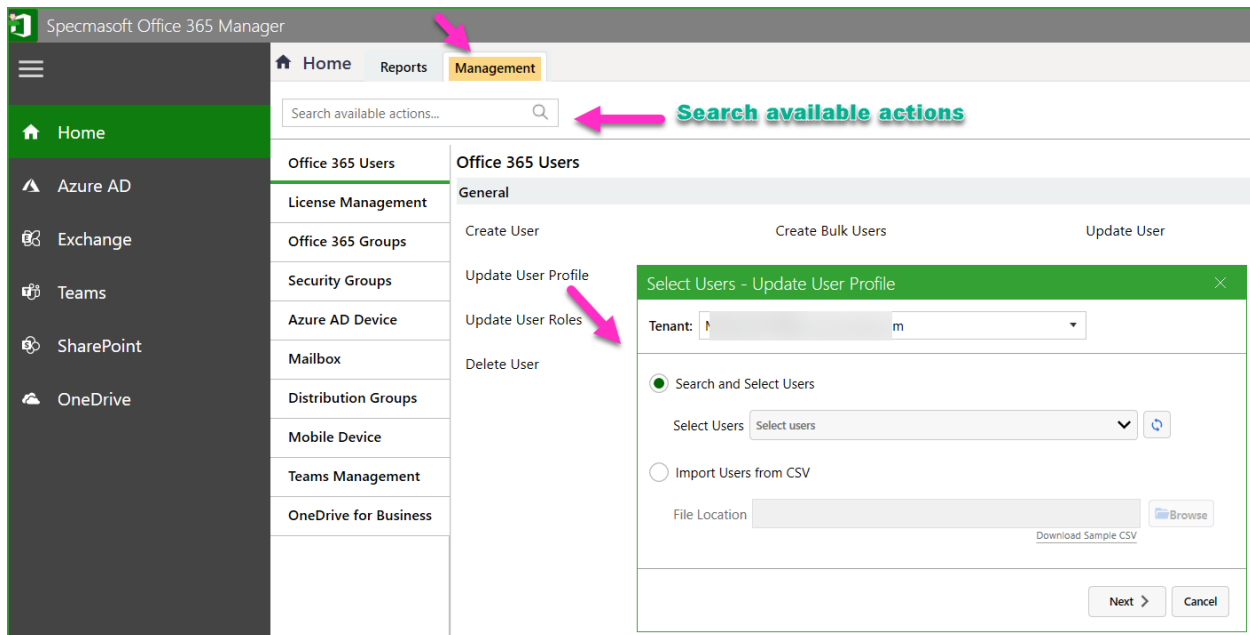
6.3. Bulk Administration using CSV

Managing resources through CSV file is one of the simplest ways to pick the required object details to update. If you want to select required objects via CSV, then simply click on the required action without selecting any objects, now you can see the option Import objects from CSV. You can select the Import CSV object and choose the CSV which includes the desired object details. Every action requires different type of CSV input, you can download the sample CSV file to match with your own CSV file and make changes in your CSV if needed.



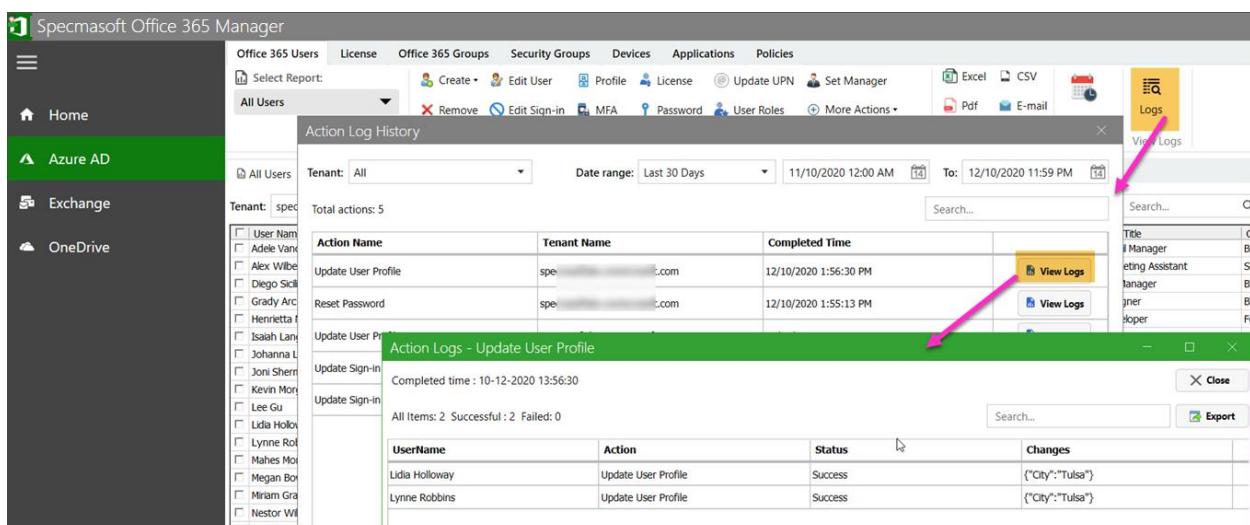
6.4. Run management actions from Home page

You can easily run the actions from report view, but you can't be able to see all the available actions in report view. From home page, you can easily search all the available actions from all the supported services with a different set of keywords. Once you find the required action, simply click on the action to run, it will open the popup to provide required objects to update. You can either manually select required objects or import objects from CSV and execute the action.



6.5. Management Action Logs

For every action run, the app will store the action result in a local database. You can simply view, search, and export action audit logs.



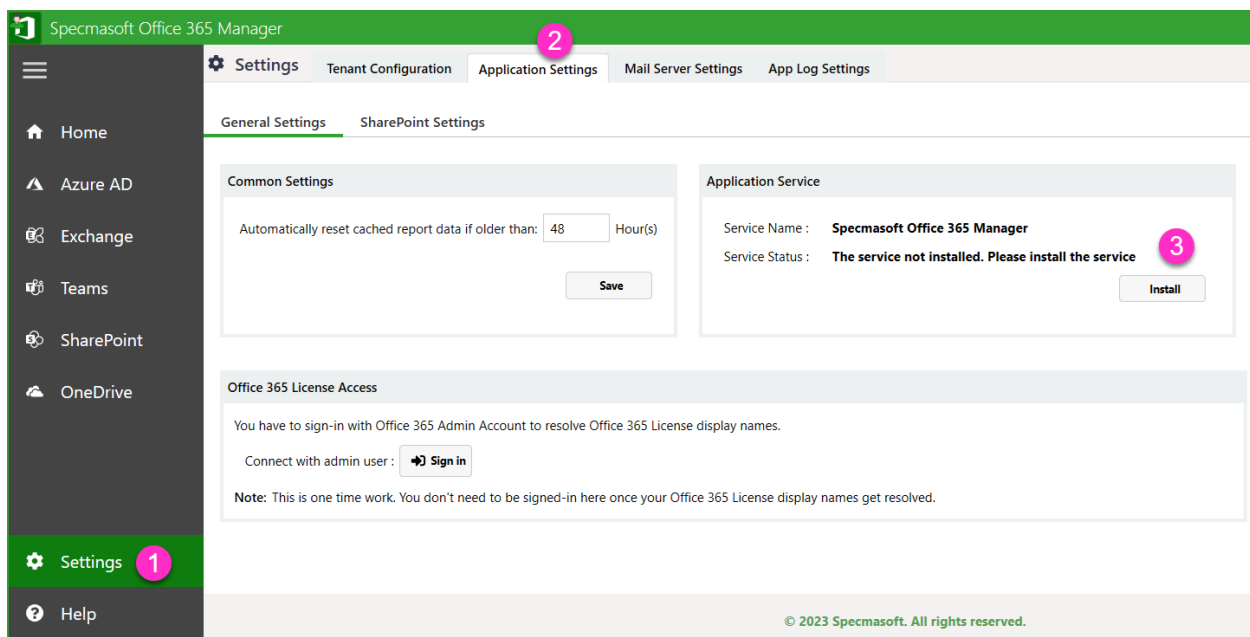
7. Schedule Reports

The app supports schedule job automation with the help of Windows Service. You can configure schedule job to automate e-mail and backup reports.

7.1. Install Application Service

Since the schedule jobs powered by Windows service, you need to first install the application specific Windows service to create new schedule tasks. Please follow the below steps to install the Application service “Specmasoft Office 365 Manager”.

- Go to **Settings** page -> **Application Settings**.
- Under Application Service section, click **Install**.
- Installing Windows service requires Admin privilege, a popup message will be prompted with the message “Admin Privilege Required”, click “Yes” to proceed, and install the service.

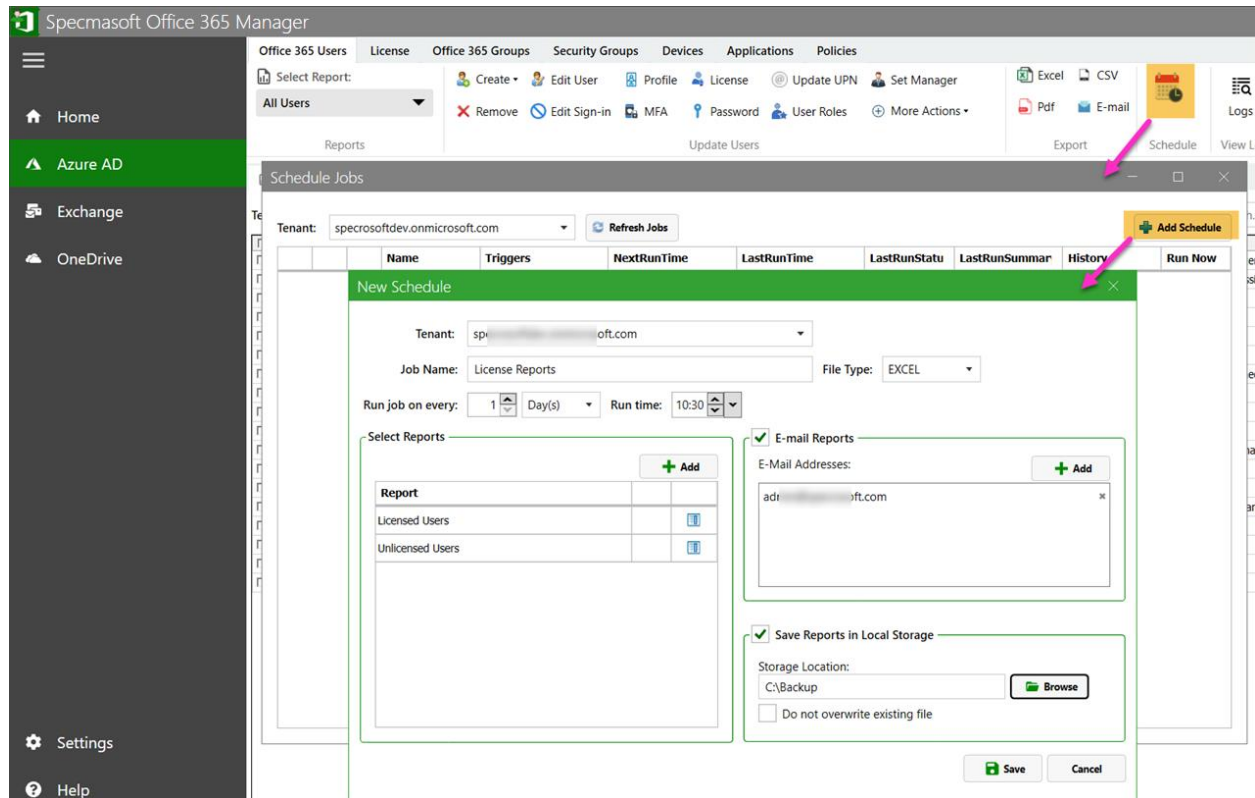


7.2. Create Schedule Report

For schedule reports, you should have installed the Windows service “Specmasoft Office 365 Manager” and the service to be in running state. (Refer the step 7.1). Follow the below steps to create a new schedule report.

- Go to anyone of service page (Ex: Azure AD).
- Click the **Schedule** button in the ribbon menu. This will open the Schedule Jobs UI.

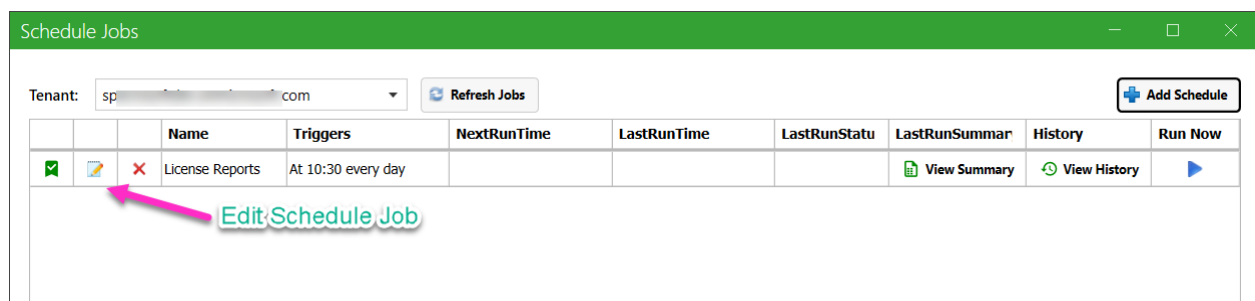
- Click the **Add Schedule** button. This will open a new schedule report UI.
- Now, fill the required job details and click **Save** to create new schedule.



7.3. Edit Schedule Report

Follow the below steps to edit the existing schedule report.

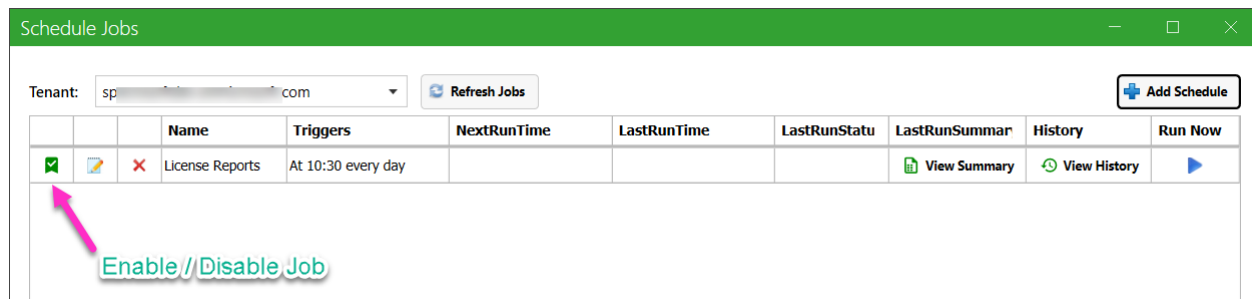
- Open Schedule Jobs UI.
- Locate the required schedule report row.
- Click on the **Edit** icon (second column). This will open the existing job details.
- You can do required changes and save the details.



7.4. Enable and Disable Schedule Report

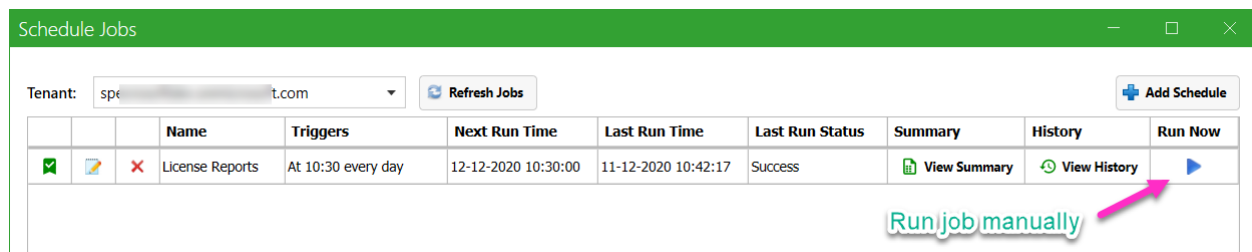
Follow the below steps to enable or disable the schedule job.

- Open Schedule Jobs UI.
- Locate the required schedule report row.
- Click on the first column to enable or disable a job.



7.5. Run Schedule Job manually

The scheduled jobs will be triggered automatically at the configured time. In some cases, you may want to trigger the job immediately, you can simply click the **Run Now** button (last column) in Schedule Jobs UI to run the job instantly.



7.6. View Last Run Summary and Job Run History

The app stores the summary details of every job trigger. You can view the summary of last job run by clicking the **View Summary** button. Also, you can view the entire run history for every job.

Schedule Jobs

Tenant: spisoft.com Refresh Jobs Add Schedule

	Name	Triggers	Next Run Time	Last Run Time	Last Run Status	Summary	History	Run Now
✓	License Reports	At 10:30 every day	12-12-2020 10:30:00	11-12-2020 10:42:17	Success	View Summary	View History	▶

Job Summary

Job Name: License Reports Run Time: 12/11/2020 10:42:17 AM

Last Run Status: Success

Reports:

Report	Total Items
Licensed Users	13
Unlicensed Users	5

Save Report Location: C:\Backup

Save Report Status: Success

Close

8. Settings

8.1. Tenant Configuration

To manage and generate reports for an Office 365 Tenant, you must add the Office 365 Tenant scope in Tenant Configuration. When you open the app for the first time, the app will prompt you to add your first scope. In Tenant configuration, you can add more Office 365 tenant scopes, edit, and remove the existing scope.

Specmasoft Office 365 Manager

Settings Tenant Configuration Application Settings Mail Server Settings App Log Settings

Add new Office 365 Tenant Add Tenant

Office 365 Tenants:

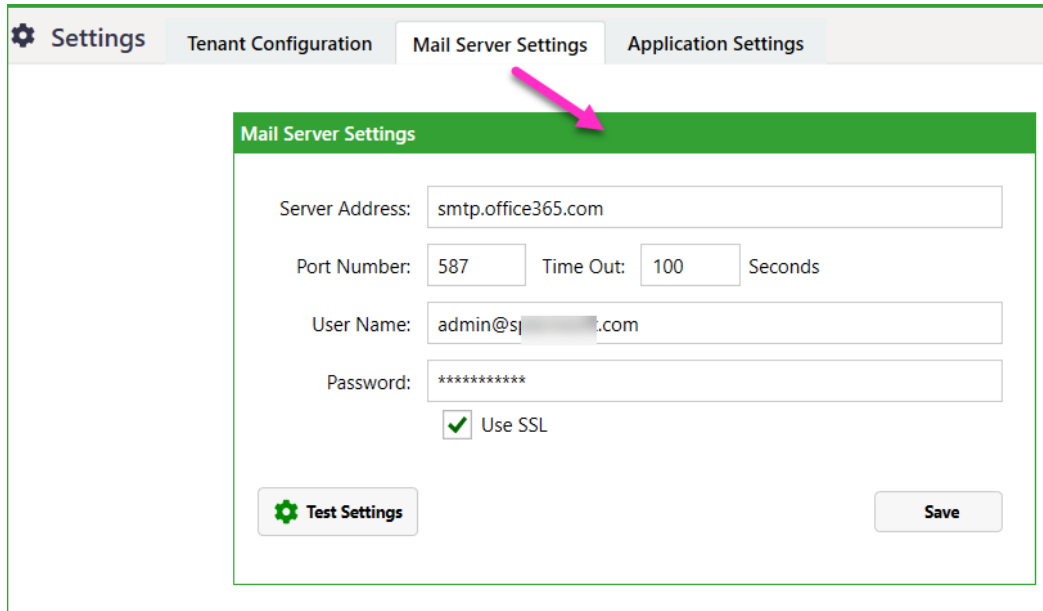
	Tenant Name	Graph API Access	Service Account	PnP Access Account	Azure App Access	Is Default
✗	isoft.com	isoft.com	Not Configured	Not Configured	Not Configured	Yes
✗	isoft.com	isoft.com	Not Configured	Not Configured	Not Configured	No

Edit existing Tenant configuration Set as default Tenant

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8.2. Mail Server Settings

The app uses SMTP-based mail server settings to send e-mail messages from the app. If you want to e-mail reports or schedule report to e-mail, then you should configure your SMTP server settings.



Settings Tenant Configuration **Mail Server Settings** Application Settings

Mail Server Settings



Server Address:

Port Number: Time Out: Seconds

User Name:

Password:

☒ Use SSL

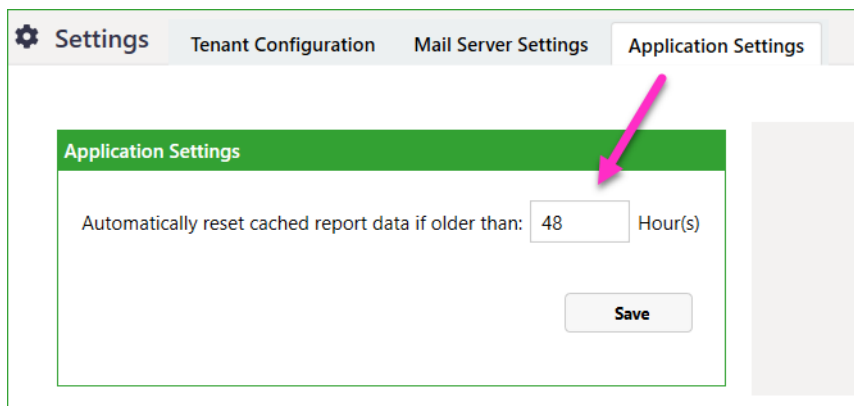
 

8.3. Application Settings

The app-specific settings can be configured from this UI.

8.3.1 Reset Report Cache Interval


The cached report source will be automatically reset when you generate report after the configured time interval. We would recommend to set this interval for a longer period and reset cached report data from report view whenever needed.



Settings Tenant Configuration Mail Server Settings **Application Settings**

Application Settings

Automatically reset cached report data if older than: Hour(s)



8.3.2 Install Application Service

The app supports automatic schedule jobs with the help of Windows service. you should install the application service to use automation tasks. Installing Windows service requires Admin privilege, a popup message will be prompted with the message “Admin Privilege Required”, click “Yes” to proceed, and install the service.

The screenshot shows the 'Application Settings' tab in the 'Settings' menu. The 'General Settings' sub-tab is active. In the 'Common Settings' section, there is a field 'Automatically reset cached report data if older than:' with the value '48' and a 'Save' button. In the 'Application Service' section, the 'Service Name' is 'Specmasoft Office 365 Manager' and the 'Service Status' is 'The service not installed. Please install the service'. An 'Install' button is present next to the status message. Red circles with numbers 1, 2, and 3 highlight the 'Application Settings' tab, the 'General Settings' sub-tab, and the 'Install' button respectively.

8.3.3 Office 365 License – Resolve License Display Names

The app automatically tries to resolve display name of Office 365 Licenses and license services based on the known license resources. The app may not resolve the name for some of the licenses and new Office 35 licenses, in this case, the app simply shows the system name of the licenses. To resolve those license names, you need to grant permission to get the display name of your licenses. You can sign-in with your admin user credentials and re-generate (reset) any one of the license reports to resolve license names. This is one-time work, you do not need to be signed-in here once your license display names get resolved.

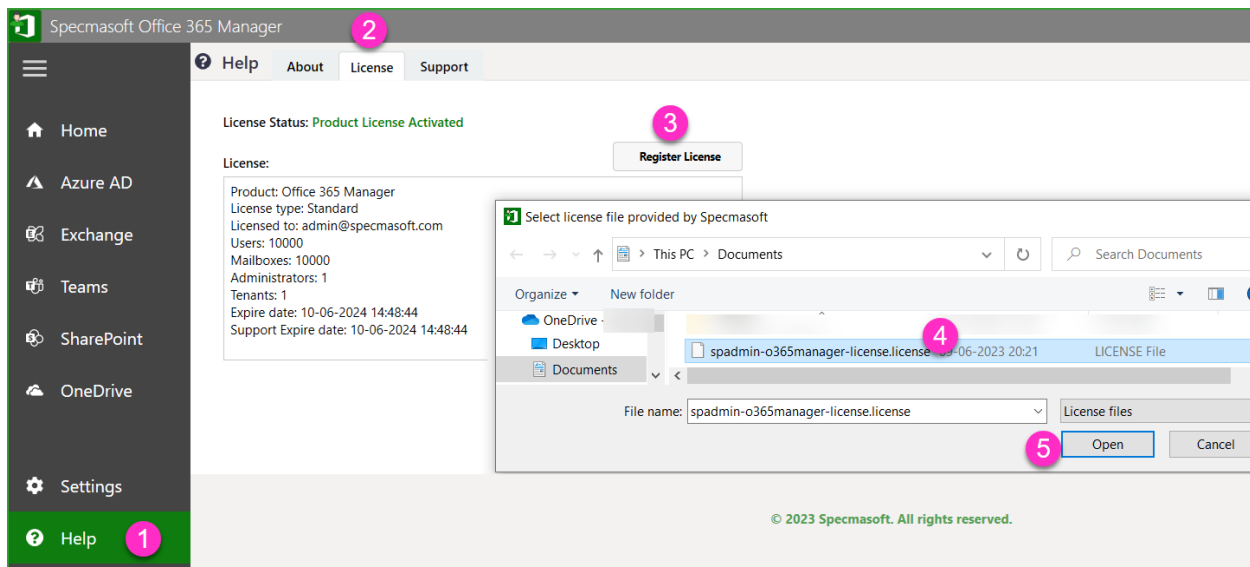
The screenshot shows the 'Office 365 License Access' section in the 'Application Settings' tab. It contains a message: 'You have to sign-in with Office 365 Admin Account to resolve Office 365 License display names.' Below this is a 'Connect with admin user:' label and a 'Sign in' button. A red arrow points to the 'Sign in' button. At the bottom, a note states: 'Note: This is one time work. You don't need to be signed-in here once your Office 365 License display names get resolved.'

9. Help & Support

On the Help page, you can check the product version of the installed app and check your license details.

9.1. Activate License

When you install the app for the first time, the app automatically activates 15-days trial license. After purchasing Office 365 Manager license from Specmasoft, you will receive an email with product license details as an attachment. You can download the attached license file and register to activate the product as a licensed version. (Refer to the below image).



9.2. Contact Support & Sales Team

For technical support, issues, and suggestions, please send an email to support@specmasoft.com with the required details.

For sales and license related queries, please send an email to sales@specmasoft.com with the required details.