

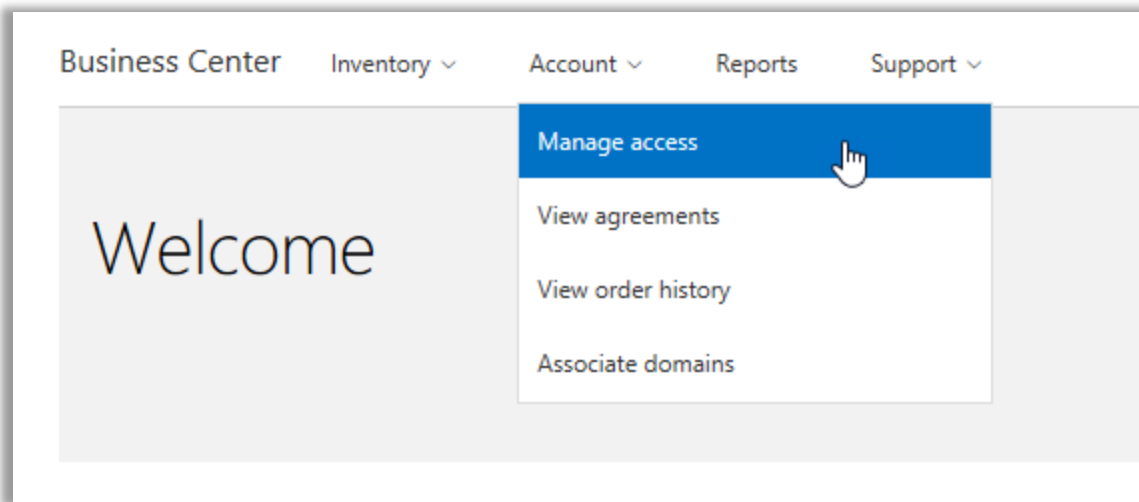
Quick Start: Manage Users and Partner Visibility

Customer Guide

November 2016

This guide shows you how to use the Microsoft Business Center to search for a user, invite new users, and assign or remove roles to manage your users' permissions. You can also manage partner visibility if you have more than one Microsoft partner, allowing some partners to view licenses and services ordered by other Microsoft partners.

To get started, sign in to the Business Center and select **Account** from the top menu, then **Manage Access**.



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Introduction

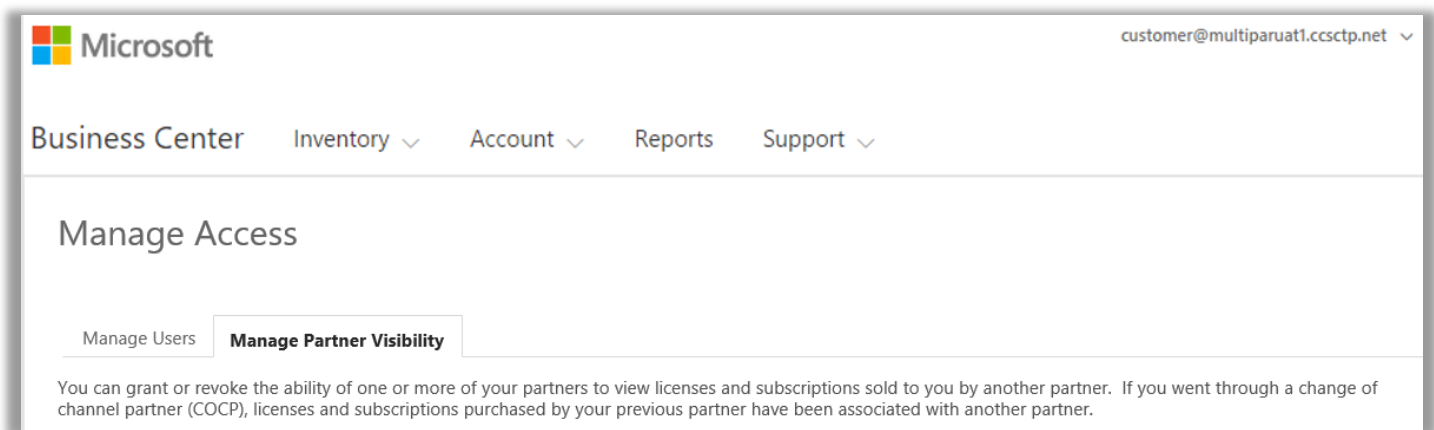
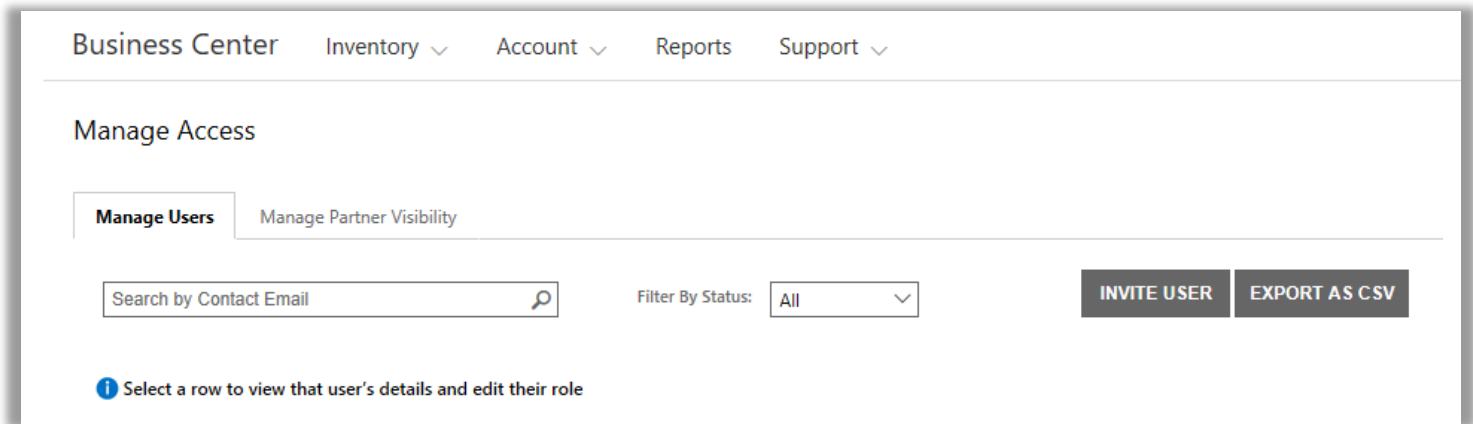
This quick start guide walks you through the tasks of managing your users and assigning partner visibility in the Business Center.



Quick Start: Manage Users and Partner Visibility

When you go to the **Manage Access** section, you will see two tabs named **Manage Users** and **Manage Partner Visibility**.

- ▶ The **Manage Users** tab is where you can search for a user, invite new users, and assign or remove roles to manage your users' permissions.
- ▶ The **Manage Partner Visibility** is where customers can allow their Microsoft partners to view licenses and subscriptions purchased for them by other partners.



Register to use the Business Center

The **Microsoft Business Center** is for organizations that have signed a Microsoft Purchase and Sales Agreement (MPSA.) This secure site lets people in your organization securely view purchase agreements, view volume licensing orders, download software, manage other users, and much more, depending on their role.

You can sign in to the Business Center using the work email address assigned to you by your organization, but you must be invited to the Business Center.

The employee designated as the **Purchasing Account Administrator** in your organization's Microsoft Products and Sales Agreement (MPSA) is assigned the task of signing into the Business Center for the first time and then inviting other people in their organization.



Quick Start: Manage Users and Partner Visibility

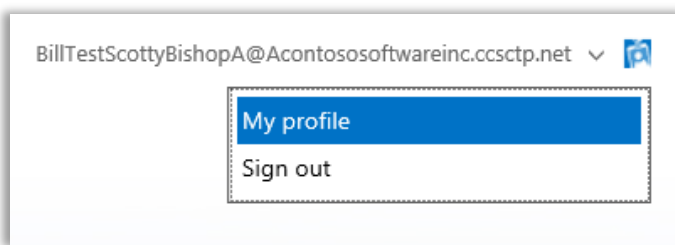
Invite people to use the Business Center

Once you have been invited to the Business Center and signed in for the first time, you can start inviting other users in your organization and managing their roles and permissions.

To manage existing users and invite new users, you must be assigned the **Account Administrator**, **Agreement Administrator** or **User Administrator** role for your organization in the Business Center. (For more information about roles, see the section below about [Understanding user roles](#).)

If you aren't sure what role you have, here's how to check:

1. From any page in the Business Center, go to the upper right corner, select your user name, and then select **My profile**.
2. On the **My profile** page, your **ROLE** will be displayed next to your **AGREEMENT NUMBER** and **PURCHASING ACCOUNT NUMBER**. You can have multiple roles.



AGREEMENT NUMBER	PURCHASING ACCOUNT NUMBER	ROLE
4100036330	--	Customer Agreement Admin
	0005222647	Customer Account Admin

Your user role is listed on your **My Profile** page. You can have multiple roles.

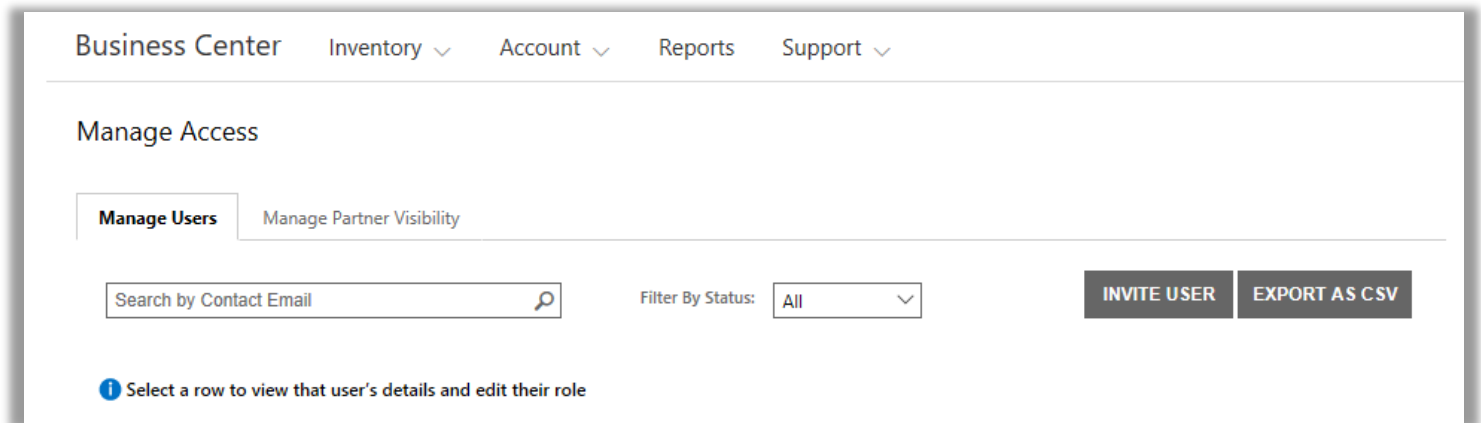
To request a new role, contact an **Account Administrator**, **Agreement Administrator** or **User Administrator** at your organization. If you don't know who these people are, ask your Microsoft partner.

Search for a user

Before you invite someone new from your organization to the Business Center, you should check to see if they are already using the Business Center. To search for them:

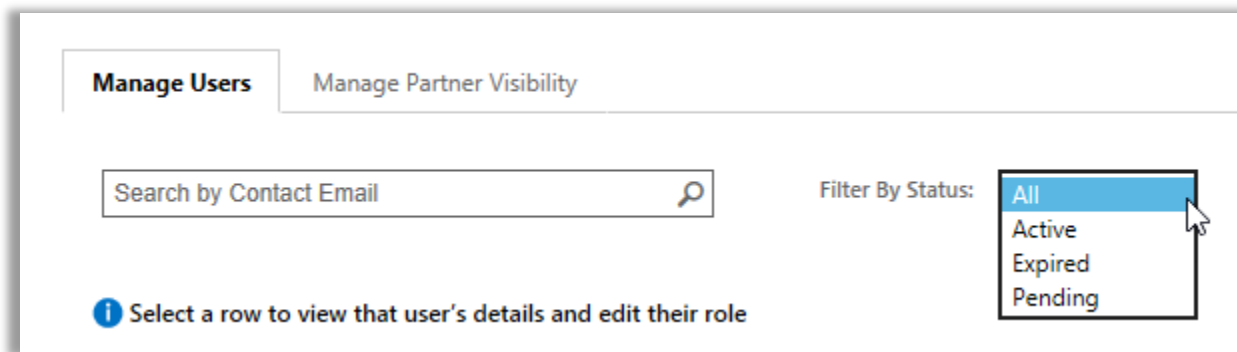
1. Select **Account** from the top menu, then **Manage Access**.
2. Select the **Manage Users** tab.
3. Enter the person's work email address (not their name) in the **Search by Contact Email** field.

Quick Start: Manage Users and Partner Visibility



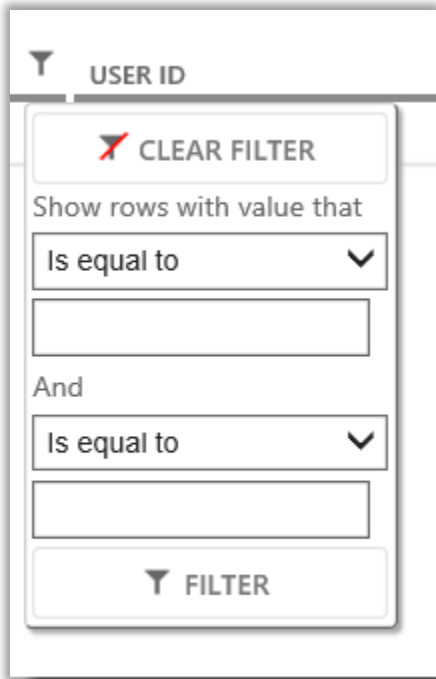
4. After you search, select **Filter By Status** to view only users with a specific account status.
 - ▶ **All:** Results display all users.
 - ▶ **Active:** Results display active users who have signed in to the Business Center at least once.
 - ▶ **Pending:** Results display users who have been added and sent a **Welcome** email message, but who have not yet signed in to the Business Center.Fpartners
 - ▶ **Expired:** Results display users who have been invited, but who did not activate their account by signing in within the 60-day deadline after Microsoft sent them an email message inviting them to the Business Center.

NOTE Expired users also display when you select **All**. You can use this to find expired users and resend their invitation to the Business Center.



5. Optional: **Sort** and **filter** if you want a more refined view of your search results.

Quick Start: Manage Users and Partner Visibility

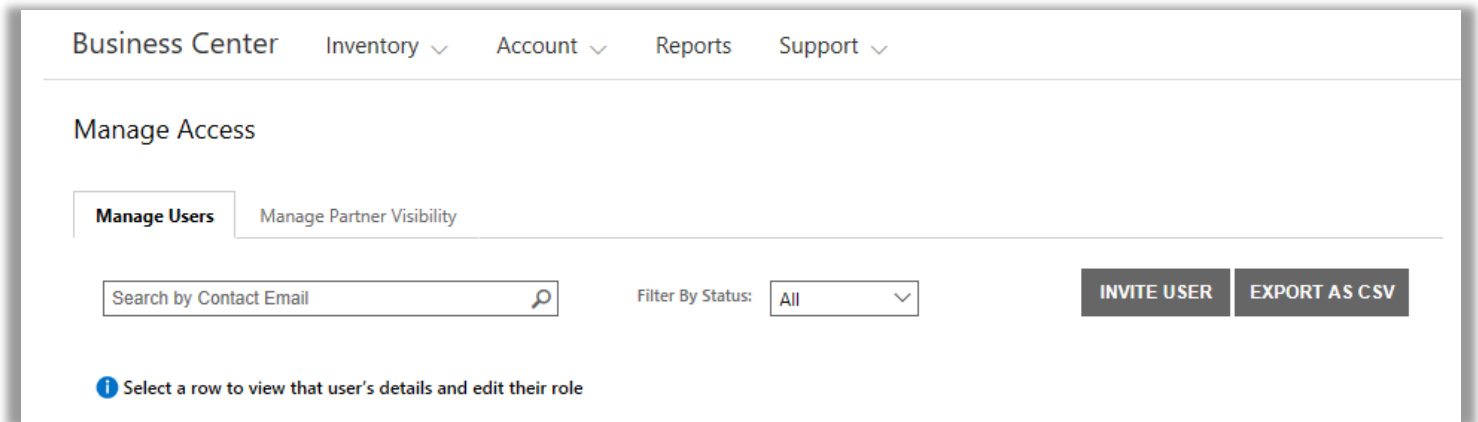


If your search turns up a lot of results, you can sort and filter them

Invite a user

Here's how to invite a new user from your organization and give them access to the Business Center:

1. On the **Manage Users** tab, select **INVITE USER**.



2. On the **INVITE USER** page, complete each field and then select **INVITE USER**. Select **INVITE ANOTHER USER** if you want to keep inviting other people.

Quick Start: Manage Users and Partner Visibility

Manage Access

Manage Users | Manage Partner Visibility

← INVITE USER

* EMAIL ADDRESS [?] * FIRST NAME * LAST NAME

* PREFERRED LANGUAGE [?] * COUNTRY/REGION

AGREEMENT NUMBER	PURCHASING ACCOUNT NAME	PURCHASING ACCOUNT NUMBER	* ROLE [?]
▼			Select ▼
			Select ▼

INVITE USER **INVITE ANOTHER USER** CANCEL

- ▶ **EMAIL ADDRESS:** The work email address for this new user.
- ▶ **FIRST NAME** and **LAST NAME** of this new user.
- ▶ **PREFERRED LANGUAGE:** Set the language for email notifications this user will receive from the Business Center.
- ▶ **COUNTRY/REGION**
- ▶ **ROLE:** Open this drop-down menu to set permissions for the user in the Business Center by assigning them one or more of the customer roles described below.

Understanding user roles

- ▶ You can assign your users the following **customer roles** with these permission levels for the Business Center.

Quick Start: Manage Users and Partner Visibility

ROLE	PERMISSION LEVEL	
	ACCOUNT ADMINISTRATOR	Users assigned to this role can manage all tasks.
	AGREEMENT ADMINISTRATOR	Users assigned to this role can view information specific to agreements.
	USER ADMINISTRATOR	Users assigned to this role can manage users.
	ACCOUNT MANAGER	Users assigned to this role can edit active agreements, handle self-service provisioning, and download software; and they can view agreements, keys, orders, license details, and reports.
	REPORT VIEWER	Users assigned to this role can view agreements, keys, orders, license details, and reports.
	ACCOUNT VIEWER	Users assigned to this role can view agreements, orders, license details, and reports.

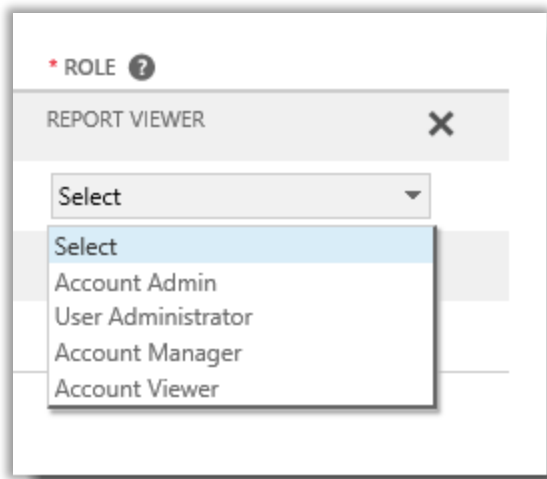
Quick Start: Manage Users and Partner Visibility

Assign roles to existing users

When you update details for an existing user, you can assign them one or more roles in the Business Center.

Here's how:

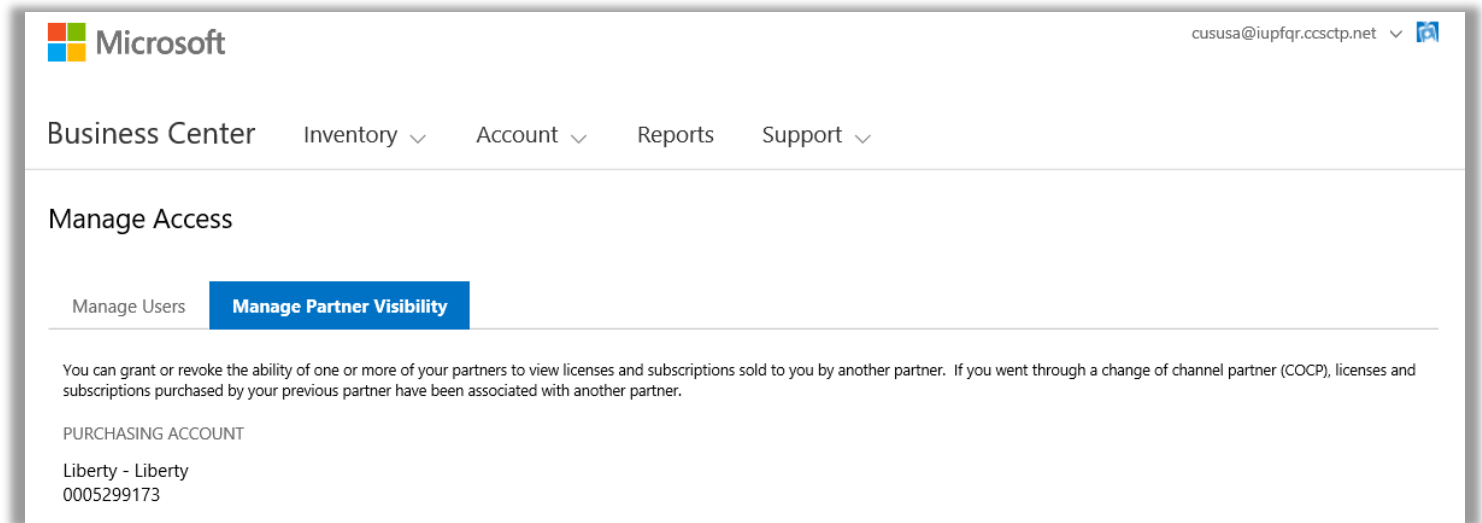
1. Select **Account**, then **Manage users**.
2. Find the user you want to edit on the **Manage Users** page.
3. Select the user to open their **User Details** page.
4. Select **EDIT** to select or delete any of the roles for this user in the menu under **ROLES**, and then select **SAVE**.



Manage partner visibility

If your organization has more than one Microsoft partner, you can use the **Manage Partner Visibility** tab to allow some of your partners to view licenses and services ordered by other Microsoft partners. Your partners will be able to view these licenses and services in the **Volume Licensing Partner Center**, a secure site similar to the Microsoft Business Center, but for Microsoft partners.

Quick Start: Manage Users and Partner Visibility



Microsoft

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Business Center Inventory Account Reports Support

Manage Access

Manage Users **Manage Partner Visibility**

You can grant or revoke the ability of one or more of your partners to view licenses and subscriptions sold to you by another partner. If you went through a change of channel partner (COCP), licenses and subscriptions purchased by your previous partner have been associated with another partner.

PURCHASING ACCOUNT

Liberty - Liberty
0005299173

By default, partners can only view licenses and subscriptions that they ordered for you. They cannot view licenses and subscriptions ordered for you by your other partners unless you grant them permission.

You can revoke permissions later if you decide you no longer want a partner to be able to view licenses and services ordered for you by another partner.

NOTE *If you went through a Change of Channel Partner (COCP) process with Microsoft, any licenses and subscriptions purchased by your previous partner are automatically associated with your new partner.*

Grant visibility

Here's how to grant your partners visibility to view licenses and services ordered by another one of your other partners.

NOTE *If you have only one Microsoft partner, then the Manage Partner Visibility settings do not apply to you.*

1. Go to the **Manage Access** section of the Business Center and select the **Manage Partner Visibility** tab.
2. Select a Purchasing Account, if you haven't already done so, by clicking **Select an account**.
3. Under **PARTNER NAME**, select the partner you want to be able to view licenses and subscriptions ordered by your other partners.
4. Under **GRANT VISIBILITY TO**, select the partners that ordered the licenses and subscriptions you want your other partner to be able to view. If you have only two partners, there will be just one other partner listed here. If you have several different partners, there may be several partners listed here.
5. When you are finished granting rights to your partners, select **SAVE**. You should see a confirmation message that you successfully changed partner visibility.

Microsoft will notify your partners by email if you have granted them the ability to view licenses and subscriptions purchased by other partners and tell them how to view these in the Volume Licensing Partner Center.

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PURCHASING ACCOUNT
Fabrikam – Fabrikam Research
005170087

Select an account

PARTNER NAME	GRANT VISIBILITY TO	DATE VISIBILITY GRANTED	DATE VISIBILITY REVOKED	LAST MODIFIED BY
▼ Partner A Allow Partner A to view licenses and subscriptions associated with these other partners.	<input checked="" type="checkbox"/> Partner B <input type="checkbox"/> Partner C <input checked="" type="checkbox"/> Partner D <input type="checkbox"/> Partner E			
▶ Partner B				
▶ Partner C				
▼ Partner D Allow Partner D to view licenses and subscriptions associated with these other partners.	<input type="checkbox"/> Partner A <input type="checkbox"/> Partner B <input type="checkbox"/> Partner C <input checked="" type="checkbox"/> Partner E			
▶ Partner E	Partner A	2/15/2015	12/31/2015	bernard@fabrikam.com

SAVE CANCEL

Quick Start: Manage Users and Partner Visibility

Business Center Inventory ▾ Account ▾ Reports Support ▾

Manage Access

Manage Users **Manage Partner Visibility**

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PURCHASING ACCOUNT
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PARTNER NAME	GRANT VISIBILITY TO	DATE VISIBILITY GRANTED	DATE VISIBILITY REVOKED	LAST MODIFIED BY
▶ Partner A	No partners found			

In this example, the customer has only one Microsoft partner (Partner A), so there are no other partners they can grant visibility to.