Module Overview

Overview
This training module introduces you to the tasks you may be asked to perform as Global Administrators, Search Administrators, and/or Search Editors in support of Microsoft Search.

We introduce the Microsoft Search admin center and some basic administrative tasks like provisioning users and managing roles in lessons 1 and 2. These topics are covered here primarily for the benefit of new admins.

Lessons 3–7 cover more advanced Microsoft Search-specific topics. Even experienced admins will undoubtedly find some useful new information in these sections.

It’s worth mentioning that this training module does not cover usage of Microsoft Search from an end-user perspective. This module focuses exclusively on topics relevant to administrators. Enjoy!
Goals
After finishing this module, you will be able to:
- Complete key tasks associated with your role
- Navigate the Microsoft 365 admin center and Azure Active Directory admin portal
- Use filters to locate tools and services relevant to your job role
- Get help and guidance for unfamiliar topics

Target audience
All administrators and support personnel who will work to support Microsoft Search in your organization.

Time required to complete this module: 60-90 minutes to complete (depending on the role—Global Administrators require more time than Search Administrators and Search Editors).

Which products include Microsoft Search?
It is important to understand that not all versions of Office 365 include support for Microsoft Search. This is an enterprise-oriented feature, supported by the products listed in Appendix 3. For more information, refer to https://docs.microsoft.com/office365/services/office-365-platform-service-description/office-365-platform-service-description#feature-availability-across-office-365-plans.

Administrative tasks & roles
Access to administrative tools is determined by your role. Once you are signed in as a Global Admin, you can assign admin permissions to other users. Microsoft recommends having at least two Global Admins in your organization (in case you need to reset another Global Admin’s account) and assigning all other admins specialty admin roles.

The Microsoft 365 admin center provides several predefined specialist roles, including two dedicated to search administration: Search Admin and Search Editor. The table below provides an overview of each of the administrative roles and the tasks that are available to them.

<table>
<thead>
<tr>
<th>Task</th>
<th>Role</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tenant/service management</td>
<td>Global Admin</td>
<td>All (Can create and manage all aspects of Microsoft 365 and Azure portal settings, assign roles, etc.)</td>
</tr>
<tr>
<td>Assign section admin</td>
<td></td>
<td>Assign user as specialty admin (e.g., Search Admin)</td>
</tr>
<tr>
<td>Assign section editor</td>
<td></td>
<td>Assign customized permissions (e.g., Search Editor)</td>
</tr>
<tr>
<td>Search service management</td>
<td>Search Admin</td>
<td>Can create and manage all aspects of Microsoft Search settings; cannot assign roles</td>
</tr>
<tr>
<td>Create and manage editorial content</td>
<td>Search Editor</td>
<td>Same as Search Admin (Can create and manage all aspects of Microsoft Search settings; cannot assign roles)</td>
</tr>
<tr>
<td>Suggest bookmarks or Q&amp;A</td>
<td>User</td>
<td>No special permissions</td>
</tr>
</tbody>
</table>

Table 1 – Tasks, roles, and permissions
Global Admin has complete control over the tenant and must be very careful not to accidentally delete user accounts, disable important services or impede other functionality. Most organizations will assign a small number of users as Global Admins. These admins will, in turn, assign other users as administrators of specific sections. In the search section, the section admin is known as the “Search Administrator.” Only a Global Admin can assign the roles of Search Admins or Search Editors. For more information, see Assign Search Admin and Search Editor.

Search Admin:
- **Full access** to Microsoft Search settings: publish, edit, save, schedule, import/export bookmarks, Q&A, and locations; New guest user
- **Limited access** to user management: Export users, search, filter users (no ‘Assign Roles’, ‘Add’ or ‘Delete’); customize navigation. Can view Microsoft Search in Bing Getting started section.
- **Cannot access** Edit Organizational profile, Conditional Access, add/edit/remove users, group management (Only Global Admins or admins who also have the user management role can manage Office 365 Groups); sign-ins; edit licenses, many other AAD settings.

Search Editor: Can create and manage editorial content such as bookmarks, Q&As, and locations. (Currently the same as Search Admin.)

Thus:
- Search Admin/Editor cannot assign another user as an Admin
- Search Admin/Editor cannot assign another user as Search Editor
- Search Admin/Editor can create, edit, delete, and publish bookmarks, Q&As and locations
Lesson 1: Explore the Microsoft Search Admin Center

Lesson overview
In this lesson, we will take a look at the Microsoft Search section of the Microsoft 365 admin center, where you will learn how to administer Microsoft Search users and features.

Objectives
After you complete this lesson you will be able to:
- Locate an existing user
- Review and edit permissions for a user
- Assign a role to a user

Time to complete
This lesson takes about 10–15 minutes

Action 1: View the settings in the Microsoft 365 admin center
The various tools and configuration settings we’ve explored so far in the Azure Active Directory admin center aren’t the only place where settings pertaining to user accounts can be managed. In fact, the Microsoft 365 admin center is where you’ll probably end up spending most of your time in the admin while administering Microsoft Search-related features. Let’s look at it now. As always, to view administrative tools and settings, you must be signed in as an admin.

We ended the last lesson by signing out of the test account and signing in again as an admin. The steps below assume an admin account.

1) Type admin.microsoft.com into the browser bar and press Enter.

Figure 1.1 – Open the admin center. Edge is shown here, but almost any browser will work.
2) You should see a screen that looks something like this:

![Microsoft 365 admin center](image)

...or this:

![Microsoft 365 admin center](image)

*Figure 1.3 – Microsoft 365 admin center contains the tools you’ll use most often*

3) Select **Show all**, then select **Settings > Microsoft Search**

**Tip:** If you don’t see Microsoft Search, see “The new admin center” section later in this lesson.

4) You should see the Microsoft Search dashboard, as shown below.
Figure 1.4 – The dashboard provides metrics for various categories and much more

5) Here, you can view and measure Top Queries, Impression Distribution by Result Type, and numerous other data points. These metrics will come in handy when you want to measure the success of your Microsoft Search in Bing rollout and adoption efforts.

**Reminder:** For the remainder of this course module, you will use this admin account and password instead of your usual corporate account to sign in to the Edge browser. You can continue to sign in to your computer with your corporate credentials—you won’t lose access to any corporate resources you usually rely upon. And if, for some reason, you do need to log into the browser with a different account during this module, follow the steps above to return to the admin account before continuing with the lessons.

**Action 2: Review the Microsoft 365 admin center menu options**

As seen in Figure 4.8 above, the Microsoft 365 admin center panel includes a “Show all” item on the left side. Click **Show all** to see the full list of options described here. In this course module, we’ll only be looking at the options marked here in red, as they pertain to Microsoft Search. For a complete rundown of all of the options, see the [Office 365 Admin help center](https://admin.microsoft.com).

- Home
- Users – Add a user, Add multiple users
- Groups – Office 365 groups, Distribution lists, security groups. ([Learn about group types](https://www.microsoft.com/resources/documentation/office365))
- Resources
- Billing
- Support
  - Settings – Microsoft Search, Services & add-ins, Security & privacy, etc.
• Setup
• Reports
• Health

**Admin centers**
• Security
• Compliance
• Device management
• Azure Active Directory – Conditional Access, etc.
• Exchange
• SharePoint
• Teams
• All admin centers
• Customize navigation
• Show less

**Action 3: enable the new admin center**

**IMPORTANT:** When you log in, depending on your configuration, you might see an option to “Try the new admin center.” You *must* have the new admin center turned on in order to access the Microsoft Search admin center, which we’ll be exploring in more depth in the lessons to follow.

If the preview is turned off, you will be unable to see the Microsoft Search-specific settings described in these lessons. Be sure that the new admin center is enabled if you can’t find the Microsoft Search settings.

![Try the preview](image)

*Figure 1.5 – Be sure to enable the new admin center.*

This “preview switch” is expected to be removed from future releases, so if you don’t see it, that is probably the reason why.

**Note:** You may also want to set your organizational profile to “Targeted release for everyone”—this is detailed in the Customization section of *Lesson 7.*
Lesson 2: Provision User Accounts

Lesson overview
In this lesson, we’ll learn how to properly provision user accounts. Simply put, Provisioning means adding applicable licenses and user information such as contact info, office location, job titles, roles, etc., to the accounts you create.

Objectives
After you complete this lesson you will be able to:
• Create, edit and manage user accounts
• Apply an Office 365 license, role, and other provisioning details to a user account

Time to complete
This lesson takes about 5 minutes.

To provision a user account, complete some or all of the following:
1. Assign licenses [required]
2. Assign roles
3. Assign users
4. Fill out each user’s profile with office location, contact information and other info

The order in which you complete these steps is not critical. However, applying the license is mandatory—Microsoft Search won’t work at all without one—so we’ll start with this.

Action 1: Apply a license

To begin the process of provisioning, you must first select a user.

1. Sign in to admin.microsoft.com with your admin account (e.g., admin@M365x819514.onmicrosoft.com) and password (e.g., rB01047HoM)
2. Select **Users > Active Users**.

3. Selecting a user account name opens the account details, where you can add or edit all of the necessary provisioning information. As shown in Figure 1.3, you can edit the user’s contact information, role, licenses, and other details right from this panel.
Figure 1.3 – Users > Active Users > [click user name]

Remember to set up the user accounts you create with an applicable Office 365 subscription. Select Licenses and Apps, choose the license(s) and Save changes.

Figure 1.4 – Select a user, then click the Licenses and Apps tab
Action 2: Add a user

One of a Global Administrator’s duties is adding new users. While this course module isn’t designed to teach you everything you need to know to be a Global Admin, adding a new user and enabling search-related permissions is a common task well worth learning—and we’ll need to use these skills again in an upcoming lesson. Let’s get started.

1) Ensure that you are still signed in as an admin
2) Go to https://admin.microsoft.com/

3) As you will be able to guess from a glance at the “Essentials” area of the screen, User management is an extremely common task. Click Add user. This will take you to a “Set up the basics” screen.
4) Fill out at least the items marked with asterisks. Click Next when you’re ready to continue.

Tip: If you don’t add a first name here, the user's name won’t appear next to the signed-in icon.
To get started, fill out some basic information about who you’re adding as a user.

First name

Last name

Display name *

test user

Username *
testuser M365x408182.onmicrosoft.com

Password settings

- Auto-generate password
- Let me create the password

Password *

Strong

- Require this user to change their password when they first sign in
- Send password in email upon completion

Figure 1.6 – Set up the basics

After you’ve named the test user account, assign an appropriate product license to test Microsoft Search in Bing. Here, we’re using an Office 365 E5 license.
Figure 1.7 – Choose a license type that has access to Microsoft Search in Bing

Click **Next** to continue to the Optional settings screen.

**IMPORTANT:** Having a license that provides access to Microsoft Search is a critical feature. If you can’t access Microsoft Search features in the Admin center, this is a possible reason why.
Manage roles

Optional settings

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

Roles (User: no administration access)

Profile info

Back  Next

Figure 1.8 – The default for new user accounts is ‘no administrative access’

1. The Roles section in Figure 1.8 tells us that this user currently has no administration access. That’s okay—we’ll review and edit this user’s role settings in a few minutes. Click Next to skip over the Optional settings for now.
2. Click Finish Adding to complete the task of adding a user.

Figure 1.9 – Close the box when the task of adding a user is complete
3. When you’re done, you’ll see the user details you specified. This user has no administrative access. We’ll change those right after the next step.

4. Click **Close** to continue.

**Edit permissions**

We *could* have given our test user special permissions by selecting a role other than “User” on the Optional Settings screen seen in our last example. But it’s much more common to assign new permissions to an existing user, so that’s what we’re doing here.

To edit permissions:

1. Select **Edit user** from the User management panel.

   ![User management](image)

   *Figure 1.10 – Edit user*

2. Locate the Roles section and click edit.
3. Select Customized administrator

This will display a list of predefined specialty roles.
4. Scroll down the list

Figure 1.13 – There are two Search-specific roles in this list: Search administrator and Search editor

5. From the Customized administrator list, notice that there are two Search-specific roles: Search administrator and Search editor. For now, choose Search editor, and Save changes.

Figure 1.14 – Be sure to save changes.

Figure 1.15 – Close the Edit user roles box when done
What a Search Editor can and cannot do

The Search Editor role is more limited than the Global Administrator’s role. The Search Editor role is designed to provide just enough permissions to create, edit, and publish Microsoft Search bookmarks, locations, and Q&A content. A Search Editor can also revert a previously published item to draft status, or delete bookmarks, locations, or Q&A items. We will discuss bookmarks and Q&As in detail in lesson 3. For now, though, notice that these tasks can be managed right here in the Microsoft Search section of the Microsoft 365 admin center.

A Search Editor (or Search Admin) can do any of the following:
- Access the admin center https://admin.microsoft.com/ (remember to set preview “on”)
- Export users (Users > Active users > Export Users)
- Create/Edit/Publish/Revert/Delete a bookmark or Q&A entry
- Review status messages in Health > Message center

A Search Editor (or Search Admin) cannot do any of the following:
- Change the role for any user
- Edit licenses (click user name, then select Licenses and Apps)
- Create a Global Admin
- Create or edit any other admin roles
- Reset passwords for billing, global, and service admins.

<Customize these tasks for your own organization>

Currently, the Search Administrator role has the same capabilities and limitations as the Search Editor role. This may change in future releases.

Figure 1.16

In short, the Global Admin can assign any number of users as a Search Administrator or Search Editor, allowing them to help manage Microsoft Search-related settings and tasks in the Microsoft 365 admin center. In the next lesson, we’ll look at some of the most important ones.

In summary:
1. Create the account
2. Fill out the user account profile
3. Assign a valid license (See Appendix 3 for a list of applicable licenses)
4. Assign a role

Tip: Optionally, the Global Admin can create users, assign roles, and assign licenses in the Azure AAD admin center. There are some features (such as conditional access) that require the use of
the Azure Active Directory admin center. We’ll explore the Azure AAD admin center and learn how to configure conditional access in lesson 7.

For more information about conditional access and SSO with Microsoft Edge, see the Microsoft Edge Mobile Support for Conditional Access and Single Sign-on Now Generally Available blog post.

Try this quick quiz before you move on to lesson 2.

**Quiz**

1. Alex has no special permissions. What would happen if Alex tried to access the admin center?
2. Allan is a Search Admin. Can Allan edit the permissions of the Global Administrator?
3. Can a Global Administrator edit his or her own permissions?
4. Name two things Allan the Search Administrator can do that Alex the user cannot do.

<Customize this quiz for your own organization>

Answers are on the next page.
Answers:
(1) No access;
(2) No;
(3) No;
(4) Publish bookmarks/Q&As/Locations, Edit bookmarks/Q&As/Locations, View the admin center/Microsoft Search dashboard
Lesson 3: Add bookmarks and Q&As

Lesson overview
Bookmarks help you publish and promote the best possible results for business-related queries. Similarly, Q&As help users get answers to common questions. The more bookmarks and Q&As you have published, the more value and benefit added for users. In the following sections, you can find several ways to create and publish relevant bookmarks and Q&As.

Objective
• Learn how to create and manage bookmarks and Q&As
• Discover how to schedule these items for publication or expiry, or set various conditions
• Understand the administrative tasks associated with each of these categories

Time to complete
This lesson takes about 20–30 minutes.

Action 1: Publish default bookmarks
[Estimated time = 5–10 minutes]

Default suggested bookmarks align with many of the most common searches in organizations and can be easily modified. We've preloaded some keywords and the title so all you need to do is add the URL to point to the relevant intranet site within your organization. As an example, for the default bookmark “HR,” add the URL for your HR department’s intranet site and then publish.
To publish:
2. Select Show all > Settings > Microsoft Search
3. Scroll down to locate the list of Draft and Suggested Bookmarks
4. Select a Draft or Suggested bookmark
5. Review the bookmark details and edit as needed. When done, select Publish

Tip: These bookmarks also serve as a great example of how to create your own. By using the published bookmarks as a template, you can better understand what to name your custom bookmarks and how to create good keywords.

Note: At time of this publication, default bookmarks are available only in English-speaking markets based on location of the Office 365 Global Admin that originally set up Microsoft Search. For more details, see the Microsoft Search bookmarks support page.

Import SharePoint promoted results (Best Bets) and top queries
Inside the Settings > Microsoft Search area of the Microsoft 365 admin center, you have access to the bookmarks tools provided by Microsoft Search. The Import command provides a seamless way to import a list of existing bookmarks saved as a .csv file or import SharePoint promoted result query rules; it’s also possible to import top SharePoint queries using PowerShell. These tools let you leverage users’ actual queries and the work you already did in creating your Best Bets.

Action 2: Import SharePoint promoted result query rules
[Estimated time = 5 minutes to run the tool; publishing time varies]
If you use SharePoint promoted result query rules (formerly known as Best Bets), you can import the list from your sharepoint.com/ and sharepoint.com/search default site collection as bookmarks into your Microsoft Search admin portal.

2. Select Settings > Microsoft Search
3. Select Import
4. From the Import panel, select SharePoint

Tip: An in-progress indicator will appear while the system is processing newly imported bookmarks.
The imported bookmarks appear in the Suggested tab on the Bookmarks page, so you can easily publish to your Microsoft Search users. Publishing time varies depending on how many bookmarks you have.

**Bulk create and import bookmarks**

[Estimated time: Bulk import = 10–15 minutes; bulk create depends on number of bookmarks]

As an administrator or an editor, you can easily bulk-create new bookmarks and then use the bookmarks import tool to add them to the Microsoft Search admin center from a .csv file. You can also use the handy **Content Creator** browser extension to assist you in creating top-quality bookmarks.

**Action 3: Import bookmarks via a CSV file**

[Estimated time = 5 minutes to run the tool; publishing time varies]

If you have an existing collection of bookmarks, you can easily import them as a list of comma-separated values (CSV). With the CSV import option, you will import the list as draft bookmarks into the collection of Microsoft Search bookmarks visible from the Microsoft Search dashboard in the Microsoft 365 admin center.
2. Select Settings > Microsoft Search
3. Select Import
4. From the Import panel, select CSV
5. Download the bookmarks template, fill it with your bookmarks collection (not all fields in the template are required), and save.
6. Upload the completed template
7. Publish draft bookmarks

Figure 3.3 – Select Import from the Microsoft Search admin center Bookmarks panel

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Import bookmarks

CSV

Import using a CSV file

Download a copy of the bookmarks template to make sure any items you’re importing are in the correct format. When you’re ready to import, come back here and upload your file.

Download CSV template

Download bookmarks template (csv)

Upload the completed template

contoso.csv

Browse

Import Cancel

Figure 3.4 – Bulk-import bookmarks using a CSV file
Tip: Download the bookmarks template to ensure that your imported bookmarks will be in the correct format. You can upload the completed template directly from this panel. If the import operation fails, an error report will detail the issue. (Common issues include the presence of one or more duplicate entries or IDs that need to be removed.) Just edit the CSV file in Excel as detailed in the error report and save, then reimport the file.

By default, imported bookmarks appear in the Draft tab on the Bookmarks page, so you can easily publish to your Microsoft Search users. If you wish, you can edit the CSV to set the Status field to “Published”; this will auto-publish the results immediately. Imports are quick; publishing time varies depending on how many bookmarks you have.

Action 4: Bulk export and edit bookmarks
[Estimated time: Bulk export = 5 minutes; bulk edit depends on number of bookmarks]

With the bookmark export feature, you can export all your existing bookmarks from the Microsoft Search admin center, review and bulk-edit them in a .csv file, and then re-import them whenever you want to make them available to all employees. This action populates a .csv file that you can open immediately or save to a local or shared drive to work with later.

2. Select Settings > Microsoft Search
3. Select Export
4. Bulk-edit the contents of the CSV file and Save.
5. Import the edited CSV file, as described in Action 1.
6. Publish draft bookmarks.

For more details, see the Microsoft Search bookmarks support page.

Action 5: Import top SharePoint queries using PowerShell
[Estimated time = 10 minutes to run the script; publishing time varies]

The top SharePoint queries for your organization make excellent candidates for bookmarks. We’ve created a PowerShell script to help you import your company’s top SharePoint queries as suggested bookmarks, which improve your Microsoft Search bookmark coverage.

The PowerShell script does the following:
- Prompts you for your SharePoint administrator credentials
- Downloads the top queries from SharePoint
- Runs SharePoint search for each of the top queries to get the top search result
- Adds suggested bookmarks to Microsoft Search for each of the top queries

Download the script here.

When you run the script, it will prompt you for your SharePoint administrator credentials. From there, it will run a SharePoint search for each of the top queries to get the top search result. The script then allows you to easily import these results as suggested bookmarks. You can make any necessary edits before they’re published.

1. To get started, download https://aka.ms/ImportSPQueries
2. Unzip the “SharepointTopQueryBookmarks.ps1” PowerShell script.
3. Right-click the script and select Run with PowerShell.
4. You will be prompted for user name and password.
5. At the AdminEmailAddress prompt, type or paste your admin user name and press Enter.
6. At the Password prompt, type or paste your password.

7. Press Enter. As the PowerShell script begins to run, you should see text that looks like this:

8. The script will begin to run. You may see a light blue bar near the top of the PowerShell window saying that it is loading dependencies, and so on.

**Note:** Once the PowerShell script has ended, an Admin or Search Editor must go to the suggested bookmarks section of the admin center and approve the newly imported bookmarks for publication.

**Expert Tip:** The Read Me file that comes with the PowerShell script describes several optional parameters we won’t cover in depth here. Here are three of the most useful ones. The others follow the same general format:

> powershell ".\SharepointTopQueryBookmarks.ps1 -Debug -Verbose -SafeMode"

Navigate to the directory your script is in (for example, if the script is on your desktop, type cd Desktop), then add the parameters on the PowerShell command line as you like. -Verbose and -Debug are both handy when troubleshooting a script. See the Read Me file for more information about optional parameters.
A sample of SafeMode output is shown here:
https://m365x408182-admin.sharepoint.com/_layouts/15/reporting.aspx?Category=AnalyticsSearch

Create additional high-value bookmarks
Identify additional high-value bookmarks for your users from your intranet logs and brainstorm with colleagues. Then, use the bookmark import tool to bulk create and publish the bookmarks.

Action 6: Understand your most frequently visited intranet sites
[Estimated time = 10 minutes]
Understanding the most frequently visited intranet sites (from intranet search logs) can help you identify great candidates for bookmarks.

Figure 3.8 –SharePoint Usage Reports (found in the SharePoint admin center) reveal users’ top queries

Action 7: Brainstorm other useful topics
[Estimated time = 10 minutes]
Think about all the sites your users might want to access and then create bookmarks for those sites. Here are some ideas to get you started:

- Internal sites, documents, resources, and forms that your employees need to access regularly
- Local traffic web pages to help your employees in their commutes
- Information on public transit
- Local weather or news sites
- Corporate partners who offer discounts on goods or services
- Self-improvement or health and fitness programs at the company and external ones
- Information on company-sponsored events, conferences, or retreats
**Action 8: Install Content Creator**

[Estimated time: basics = 5 minutes; total time depends on number of bookmarks/Q&As created]

Search Editors should install an optional browser extension called **Microsoft Search Content Creator**. Available for Edge and Chrome browsers, this handy extension allows a Search Editor to create, edit, and publish bookmarks and Q&A content. When installed, you will see its icon in the upper-right corner of your browser’s toolbar.

*Figure 3.9 – Search Admins and Search Editors should install the Content Creator extension*

If not already installed, get the extension here:

aka.ms/ContentCreator-Edge
aka.ms/ContentCreator-Chrome

Go ahead and install it now.

**Action 9: Add a bookmark**

1. In the upper-right corner of your (Edge or Chrome) browser, locate the Content Creator icon.

*Figure 3.10 – The content creator extension, as seen in Edge*

**Tip:** The new version of Edge based on the Chromium engine can load Chrome extensions.

2. Sign in using an account with Search Editor/Admin rights.

   Example admin user name:
   admin@M365x819514.onmicrosoft.com
   Password: rB01047HoM
   <Customize this for your own organization>

3. You can now create bookmarks and Q&A content using this extension.

4. Go to any page, then select the Content Creator extension.

*Figure 3.11 – Sign in as a Search Editor*
5. You will see that, in most cases, it automatically displays the title, URL, description and perhaps even a few keywords. You can edit these or add more as needed.

6. When done, select **Save to draft** or **Publish**.

7. In the example shown in Figure 3.12, we’ve published a bookmark with the reserved keywords “Microsoft Search docs.” This ensures that this bookmarked result will *always* appear when a signed-in user searches for Microsoft Search docs. Don’t overuse reserved keywords. Reserved keywords can only be used once.

![Microsoft Search](image)

*Figure 3.12 – Reserved keywords can only be used once*

**Action 10: Review, edit, and publish bookmarks suggested by others**

![Feedback](image)

*Figure 3.13 – Any user of Microsoft Search in Bing can suggest a link*
A user clicks **Feedback**, then selects **I want to suggest a link**. Submissions appear in the Microsoft Search admin center as suggested bookmarks.

![Feedback interface](image.png)

**Figure 3.15** – Suggested, scheduled, draft, and published bookmarks appear in the Microsoft Search admin center. These can then be reviewed, edited, scheduled, and published by a Search Admin or Search Editor.

### Add Enterprise Q&A

Enterprise Q&A lets you editorially create quick answers for the most frequently asked questions in your organization. Q&A is similar to the concept of bookmarks; users can easily discover the answers they need when they search with the search keywords you add. Just like bookmarks, you can set up customized answers based on different criteria, including country, security groups, and operating system. There is one notable difference, though: Q&As can be formatted with HTML tags.

![Q&A interface](image.png)

**Figure 3.16** – Like bookmarks, Q&As can be managed and published (etc.) via the Microsoft Search admin center.
Supported HTML tags

You can use existing HTML content or add HTML tags to your answer (Q&A description). Unsupported tags are ignored.
The following HTML tags are supported:

- blockquote
- div
- em
- h1, h2, h3, and h4
- ol, ul, and li
- p
- pre
- span
- strong
- table, thead, tbody, tr, th, and td
- u
- a
- code
- br
- hr
- img

Like Bookmarks, the Q&A index is refreshed immediately after a Q&A is added or changed.

**Action 1: Identify top helpdesk and HR issues to set up useful Q&As**

[Estimated time = 20 minutes]
Knowing the top helpdesk, HR, and company policy queries generated by the people in your organization can help you establish the most effective Q&A topics. Review the helpdesk logs or pull directly from your organization’s internal FAQ or Q&As to identify the most commonly asked questions for users to search.
Action 2: Create your Q&A
[Estimated time: Varies, depending on number of Q&As]
Access the admin center and enter your organization’s Q&A, including keywords and Q&A settings.

Add or edit a single Q&A
1. Go to Microsoft 365 admin center
2. In the navigation pane, go to Settings and select Microsoft Search
3. Select Q&A tab. By default, the first tab (bookmarks) is selected
4. To add a Q&A, select Add new. To edit a Q&A, select the Q&A in the relevant Q&A list.
5. As you add or edit the information, the preview automatically updates
6. Save your changes

Try to put yourself in the user’s mindset by imagining the keywords they will use while searching for the Q&A content you’ve prepared. As with bookmarks, you can ensure that your users always find a specific query result by using a reserved keyword.
Action 3: Use Content Creator to edit and publish Q&As
[Estimated time: basics = 20 minutes; total time depends on number of Q&As created]
Again, we’ll begin by selecting the Microsoft Search Content Creator icon from your browser’s address bar. This time, we’ll select the Add Q&A tab. As before, this extension will enable us to directly publish Q&As or save them as drafts to review within the admin center before publishing.
Figure 3.20 – Sometimes the first answer retrieved is not the best one. In this case, 10 results were returned. Here we are choosing Q&A answer #2 of 10. If you don’t see good answer candidates, try rephrasing your question.

Figure 3.21 – In most cases, a search engine results page will present several Q&A candidates.

For more details, see the Manage Q&As section in the Microsoft Search docs.
Conditional publishing

Bookmarks and Q&As can be configured with conditional variables that govern when and where your bookmark/Q&A results are displayed. For example:

- **Specify countries or regions**, and only users with their browser set to a targeted locale will see that bookmark/Q&A. You could, for example, make a North American help desk number visible only to users with browsers configured for that region.

- **Specify an expiration date** for a bookmarked map to the company event, and it automatically disappears after the event has passed.

- **Specify other targets**, and bookmarks will only appear to members of a specific group, device type, OS, or user location. Make an iOS-specific Q&A appear only on iOS.

**Section summary**

**Remember:** You don’t have to do all this work yourself. The Global Admin can assign Search Admin and Search Editor roles to help manage their team’s own bookmarks. Search Admins and Search Editors can suggest, edit, schedule, and publish bookmarks, Q&As, and Locations content.

(Refer back to lesson 2 if you are unsure how to set up Search Admin and Search Editor roles in the admin center.)

**Remember:** Great bookmarks are created by organizing your content, creating useful queries and keywords, identifying top results, and combining these with well-written titles and descriptions.

For more information on creating effective titles, descriptions, keywords, and more, see the Plan your content section of the Microsoft Search documentation.
Lesson 4: Locations and floor plans

Lesson overview
In this lesson, you will learn how to access and navigate the Microsoft Search documentation library. You will use the guidance in this documentation to explore the locations and floor plans features, as well as best practices that will help you successfully implement the floor plans feature.

Objectives
After you complete this lesson you will be able to:
- Access and navigate the online documentation for Microsoft Search
- Create and manage information that helps users find addresses and locate buildings
- Understand how to set up searchable floor plan maps for your organization’s buildings

Time to complete
This lesson takes about 15 minutes. Setting up a complete floor plan takes at least 48 hours.

Locations
The locations feature is documented in the Microsoft Search docs. Take a moment and search for “Microsoft Search docs” now. We’ve set up this phrase as a reserved keyword to make it easy to find.

Action 1: Locate the locations documentation in the Microsoft Search docs
1. In Bing, search for “microsoft search docs” (capitalization is unimportant)
2. Select Provide answers
3. Select Locations
4. Follow the instructions under Add or edit a single location
5. Administrators should add all important locations of your organization.

**Note:** Unlike bookmarks and Q&A, the index is not refreshed immediately, and it can take several hours for new or changed locations to appear in search results.

**Import/export**
Be sure to review the Locations documentation for important information on how to prevent errors when preparing and import building location data.
In addition to finding building addresses on street maps, it is possible to create and publish maps of business office floor plans. Microsoft Search floor plans help users find people and meeting rooms within a building. A floor plans search result can answer questions like these:

- Where is Allan Deyoung’s office?
- Where is room 2/1173
- Where is meeting room C1?

To make it easy to find answers to questions like these, information about an organization's buildings, offices, and facilities needs to be available and made searchable. Larger organizations usually have facilities or space management teams and might already have this info available. In a smaller organization, you—or a Search admin you delegate—might have to create and add it.

When a user searches for a room or office location of a colleague, the room numbers in floor plans are matched with office locations in Azure AD. If a match is found, then a floor plan diagram showing the arrangement of rooms for a floor appears, with a pin placed on the location you searched for.

Once this is set up, users will be able to search for something like “building 2 floor 1” or “Allan’s office” and Bing will show the floor plan—complete with a link to see a map or get directions.
**Action 2: 48 hours before you upload floor plans**

Before you start to upload floor plans, you need to index the users’ office locations.

![Microsoft Search](image)

*Figure 4.4 – Get started in the Floor plans section of the Microsoft Search admin center*

1. In the Microsoft 365 admin center, go to Settings > Microsoft Search > **Floor plans**
2. Select **Get started** to index your Azure AD office locations.

Depending on the size of your organization, it can take up to 48 hours to complete. If you ignore this step, you will get errors while performing the procedure.

**Note:** If you don't see this notice, then you or someone in your organization has already initiated this step.

![Allan Deyoung](image)

*Figure 4.5 – The office location data is defined in AAD*
There is some flexibility in the ways you can format your office locations. You might, for example, use any of the following common formats:

- 31/2723
- 31-E-2723
- 31/East/2723
- BV TOWER/31-E-2723
- Etc.

The location data should be formatted to match the description in AAD. If you have not already added this data, consider using a combination of building, floor, wing, and room number. (Example: 36-1-A-100 follows the format => building+'.'+floor+'.'+wing+'.'+room.)

When implemented, the Locations > Floorplans feature returns results for searches by name or office number.

**Action 3: Add floor plan**

1. In the M365 admin center, go to Settings > Microsoft Search >Floor plans.
2. Select Add.
3. Select the building in the drop-down and select Next.

If the building isn’t listed, you need to add it in Locations. See Manage Locations for more info.

4. Select Upload files, and then select the floor plan you want to upload.
5. After the file uploads successfully, you need to identify how the floor number or wing is represented.

*Figure 4.6 – Floorplans are uploaded, then linked to office locations*
6. Enter the code that identifies the building. The building code can be found on the user’s account in the Office location property. For example, if the user’s office location is 2/1173, then building code is 2.

7. Review and identify the location patterns for all uploaded floor plans, and then select Next.

8. When you’re ready, select Publish to make the floor plan searchable.

Figure 4.7 – The office location is shown on the map

See the floor plans documentation for more information on editing floor plans, troubleshooting errors, and best practices.

There are several commercially available tools that can help you create and edit interactive floorplans, including Autodesk AutoCAD, Adobe Illustrator, and Microsoft’s own Visio. Some helpful hints for creating and managing floorplans are provided below.
For more information
Managing floor plans:
https://docs.microsoft.com/microsoftsearch/manage-floorplans

Best practices for Microsoft Search floor plans:
https://docs.microsoft.com/MicrosoftSearch/floorplans-bestpractices

Creating a floor plan:
https://support.office.com/article/create-a-floor-plan-ec17da08-64aa-4ead-9b9b-35e821645791

See also:
https://support.office.com/article/Diagrams-fa9b7a59-3099-4637-820c-1b41b24fc2a7#ID0EAABAAA=BuildingPlansTab&ID0EABAAA=BuildingPlansTab
Lesson 5: Acronyms

Lesson overview
In this lesson, we will learn how to manage the administrative aspects of the Microsoft Search acronyms feature introduced in Q1 2020. We will also provide guidance on how to best use this feature.

Objectives
After you complete this lesson you will be able to:
- Create, edit, and publish a collection of custom acronyms and their definitions
- Bulk import and export acronyms
- Access and navigate the online documentation for acronyms

Time to complete
This lesson takes about 15 minutes

Overview
The new Acronyms feature in Microsoft Search helps users navigate the often-confusing world of TLAs (or acronyms of any length, really). If you’re an admin, this article will help you get started adding and publishing custom definitions for the acronyms your organization uses to refer to its people, products, groups, operations, or services. Then, when users come across an acronym they may not recognize, Microsoft Search will reveal common definitions from public sources and their organization’s own unique definitions, if any.

Introduction: The Challenge of TLAs
Imagine you’re in a meeting and someone starts using an acronym like TLA in an unfamiliar context. Microsoft Search in Bing to the rescue!
With the ability to create custom definitions for any acronyms your business may require, Microsoft Search makes sense of the query...

...even when there’s more than one definition.

This is particularly useful when acronyms you think you know, such as SAN (often, “storage area network”) or SEO (“search engine optimization”) mean different things within your organization.
In some cases, such as the examples above, there may be more than one definition found on the internal network. In a case like this, click **See more** to show all results.

Figure 5.4 – Examples of published results
Microsoft Search is smart enough that it can pick out definitions for your search term appearing in documents and conversations found on the company’s internal sites, documents, internal Teams and SharePoint sites, documents, Yammer channels, and so on.

Those outside your company, on the other hand, have no access to these strictly internal search results—you won’t see the work search section at all unless you are signed in to a Microsoft Search–enabled account as an authenticated user.
And when there are no unique internal definitions found by Microsoft Search, it’s smart enough to get out of the way and let Bing do its job. Notice how the “Show results from Contoso” window is minimized in height in the SERP example above. When a work-search result has a high certainty of being a good match, the result is shown. Otherwise, it stays out of the way.

**Adding acronyms**

With your admin account, sign in to Microsoft Search admin center and follow along as we take a quick look at what you’ll find in the new Acronyms section there.

![Microsoft Search admin center](image)

**Figure 5.8 — You must be a Global Admin, Search Admin, or Search Editor to access the Microsoft Search admin center**

**Add** — add a new acronym

The Add button opens the Edit panel. (Clicking on an acronym and selecting Edit also takes you to this panel.)
Figure 5.9 – Click Edit to open the Edit panel. The History tab shows the edit history.

Figure 5.10 – Edit History

Figure 5.11 – When adding or editing, the Acronym and Expansion fields are required; other fields are optional.

Figure 5.12 – Optional: Source file or website that contains the definition (AKA ‘Expansion’). Note that if you leave this field blank, it inserts the company name defined in your Organization profile.
Select the checkmark next to one or more acronyms to reveal options to Publish or Delete the acronym(s).

Select a published item works similarly. Click to the left of the Acronym category name to select all items, which you can then revert to draft, edit or delete.

Similarly, select any published acronym to show the Revert to Draft, Edit, and Delete options.

The Revert to Draft button unpublishes your file; it ends up back in the Drafts section.

**Bulk import/export acronyms**

Although you could individually create and publish every acronym using the single-item publishing procedure described above, it isn’t a very efficient way to publish a large number of acronyms. Instead, consider using the bulk import and export options.
Tip: You can set up the import file to automatically publish. Just set the status field to “publish.”

Bulk export
Export existing acronyms as a CSV file, review and bulk-edit them in Excel (etc.), and then re-import and publish the updates. Or save the CSVs you export to a local or shared drive to work with later. You might, for example, have the acronym definitions translated into different languages for your international offices.

2. Select Settings > Microsoft Search
3. Select acronyms and select Export

   This will export any existing acronyms and their definitions to a dated CSV file in your Downloads folder.

4. Bulk-edit the contents of the CSV file and Save.
5. Import the edited CSV file.
6. Publish draft acronyms

For more information, see our companion article entitled Bulk Operations for Microsoft Search. Visit https://docs.microsoft.com/microsoftsearch/manage-acronyms to learn more.
Lesson 6: Customization options

Customization

You can customize many aspects of Microsoft Search, including the navigation options in the admin center, release preferences, how it responds to certain keywords and even its user interface, which you can customize with your own color scheme, branding and logo. These optional customizations are set up in the Microsoft 365 admin center. Here’s how.

1. Choose Customize Navigation in the M365 admin center’s left menu.

Other admins won’t see your changes. To view hidden items, select Show all from the navigation pane.

2. Organizational profile – The easiest way to get to this setting is by typing ‘organization’ into the search box at the top of the admin center’s home page (or by creating a bookmark to the company profile page at https://admin.microsoft.com/AdminPortal/Home#/companyprofile). Then select ‘Organization profile settings’
These organization profile settings provide several customization options, including:

1. **Set the company name, address, phone, technical contact info and preferred language.**

   ![Figure 6.3 – The information in the Company profile section is important to add.](image)

2. **Set your Release preferences.**

   ![Figure 6.4 – Release preferences](image)
Here, you will find three options:

a. **Standard release** – Everyone in your org gets updates when Microsoft releases them broadly.
b. **Targeted release for everyone** – Get updates early for your entire organization.
c. **Targeted release for selected users** – With this option, you can manage people for Targeted release, to prepare your organization for upcoming updates.

3. **Manage custom themes for your organization** – With this option, you can customize Office 365 to reflect your organization’s brand. Note, however, that the Organization profile settings available in the Microsoft 365 admin center are not as extensive as those available on the AAD admin portal’s **Configure company branding** page, where separate branding configuration options for different languages are available. In that section’s **Advanced settings**, you can even configure separate logos for light and dark themes.

![Figure 6.5 – Configure company branding in the AAD admin center](image)

**Advanced settings**

- **Sign-in page background color**
  - #FFFFFF

- **Square logo image**
  - Image size: 240x240px (resizable)
  - Max file size: 10KB
  - PNG (preferred) or JPG

- **Square logo image, dark theme**
  - Image size: 240x240px (resizable)
  - Max file size: 10KB
  - PNG (preferred) or JPG

- **Show option to remain signed in**
  - Yes
  - No

![Figure 6.6 – AAD admin center > Company branding > Advanced settings](image)

a. Sign in as a global administrator to [https://aad.portal.azure.com/#dashboard](https://aad.portal.azure.com/#dashboard)
b. Navigate to the Company branding section

c. If the screen advises you that you need to get a free premium trial to use this feature, use this URL instead:

https://aad.portal.azure.com/#blade/Microsoft_AAD_IAM/ActiveDirectoryMenuBlade/LoginTenantBranding

To learn more about these Azure customization options, see Add company branding section of the Azure AD Operations reference at https://docs.microsoft.com/azure/active-directory/fundamentals/customize-branding
Figure 6.7 – Logo and custom theme preferences

You can specify:

a. Logo image, 200 x 30 pixels in size. You can upload a file or use an image from a URL.
b. Make logo clickable.
c. Background image (max. 1366 x 50 pixels, JPG, PNG, or GIF, no larger than 15 KB.)
d. Color settings – Color of navigation bar, text and icon, and accent can all be customized.
Lesson 7: Manage groups and access

Lesson overview
As an admin, you probably already know that you can create various types of groups: distribution lists, security groups and so on. You can also deploy and manage features by establishing a policy that applies to an entire group. In this lesson, we’ll look at this powerful capability, as well as how to add and manage users as a group.

Objectives
• Learn how a policy can include and exclude certain users
• Configure and test Conditional Access settings
• Test configurations with the ‘What If’ tool

Time to complete
This lesson, including a brief review of signing in and out of accounts, takes about 20 minutes.

How to manage Microsoft Search in Bing users en masse
If you aren’t doing it already, consider using groups to simplify user management and new feature rollouts. You could, for example, add users who have completed this training to a group and give that group Search Editor permissions. You could use conditional access (detailed later in this lesson) to provide staged access to the service. Or you could turn off the service entirely. Thus, there are a few ways of managing Microsoft Search in Bing users en masse:

1. Assign a role (e.g., Search Editor) to a specific group of users.
2. Add users to a group and then provide conditional access to the group.
3. Enable or disable Microsoft Search in Bing for your entire organization.
**Action 1: Add users to a group**

![Add members screenshot](image1)

**Figure 7.1 – Add members**

![Group membership changes screenshot](image2)

**Figure 7.2 – Group membership changes take effect immediately**

The following approaches can help to identify groups of users:
- Partner with a business sponsor within your organization
- Identify a group of early adopters
- Identify groups that do a high volume of internal searching
- Expand to users in other geographical locations, including international

**Action 2: Configure Conditional Access**

By configuring [Conditional Access](https://docs.microsoft.com/en-us/azure/active-directory/conditional-access), you will be able to control which users can access a specific service such as Microsoft Search in Bing. For example, you could use it to deploy Microsoft Search in Bing in multiple stages as groups completed a training session.

**Note** This feature requires configuration in the AAD section of the Azure admin portal and requires that you have administrative access and an applicable Office 365 license,

1. Open https://portal.azure.com/ and sign in with your admin account user name (e.g., admin@m365x819514.onmicrosoft.com) and password (e.g., rB01047HoM)

![Microsoft Azure portal](image1)

Figure 7.3 – Microsoft Azure portal

2. Select **Azure Active Directory** from the list of Azure services.

![Select Azure Active Directory](image2)

Figure 7.4 – Select Azure Active Directory

3. Now select **Enterprise applications**
4. On the Enterprise Applications screen, you will see the Application Type menu. Click to open the drop-down and choose **Microsoft Applications**.

![Select Microsoft Applications](image)

**Figure 7.6 – Select Microsoft Applications from the drop-down menu**

5. Type ‘microsoft search’ into the box as shown here, then select the **Microsoft Search in Bing** result.

![Microsoft Search in Bing](image)

**Figure 7.7a – You can choose to use either the Legacy search option (shown here) or the new “Enterprise Apps search preview” (shown in Figure 7.7b) – both options are described below.**
**Legacy Search**
If you using the “legacy Enterprise Apps search experience,” the query must start with the word “microsoft.” You won't find it if you just search “Search” or “Bing.” Try a search for “microsoft search”.

**New Search Preview**
In the much-improved “Enterprise Apps search preview experience,” be sure that “Microsoft Applications” is selected under “Application Type.” Click **Apply**, then search for “bing”.

6. Select the panel entitled 3. Conditional Access for a quick review of the key steps. This step isn’t absolutely necessary, but it can be helpful if you’ve never seen this section before.
If you haven’t done this before, now is a good time to review best practices for conditional access to ensure that you don’t accidentally lock yourself out.

**Action 3: Verify access**

In lesson 3, you learned how to assign a test user account. Now we need to verify that the test account can access Microsoft Search in Bing.

1. Open your browser and sign in to bing.com using the “Work or school account” option.

2. Sign in with an available user name: (e.g., alexw@M365x819514.onmicrosoft.com) and password (e.g., rB01047HoM)

**Tip:** On your system, you should create your own test account and use it instead.
3. Type “my files” into the Bing search box to verify that Microsoft Search in Bing is working. You should see a result that looks something like this:

![Figure 7.10 – Ensure that your test user can access Microsoft Search in Bing](image)

You now know your test account can access Microsoft Search in Bing. Now let’s exclude this account via Conditional Access.

**Action 4: Enable Conditional Access**

1. Sign back into the AAD admin center as an admin.
2. From the Security menu, choose **Conditional Access**.
Remember how we said step 6 wasn’t absolutely necessary? Here’s how to skip it.

To access the Conditional Access settings directly from the AAD Dashboard, follow these steps:

2. Click the ➡️ icon to expand the left menu

![Dashboard menu expanded](image1)

*Figure 7.13 – Expanded left menu*

3. In the search box next to “All services”, type the word “conditional,” then click the star next to the search result, as shown in figure 3.4.

![Azure Active Directory search](image2)

*Figure 7.14 – To add Conditional Access to your Favorites, select All Services (1), search for Conditional (2), and click the star (3).*

4. Click **New policy** and give it a name.

Let’s **include** our test user.

a. Click **Assignments** ➔ **Users and groups**.

b. Then, on the Include tab, Select **Users and groups**.

c. Select ‘test user’.

d. Then, switch to the Exclude tab and select our admin account.

e. Click **Done** when both selections have been made.
5. The next step is to include the app or service we want our conditional access policy to apply to. In this case, it’s Microsoft Search in Bing. Verify that it is included under “Cloud apps or actions.”

6. We’re almost there! Now that we’ve selected the users who will and won’t be affected, and the app this policy applies to, we just have to tell the policy what to do when it’s in effect. In this case, we want it to block. So, select **Block** from **Access controls > Grant**, then click **Select**.
7. When these steps are completed, click **Enable policy** ‘on’ and click **Create** to create the new policy.

8. After a brief validation step, you should see a “Validation Successful” message, and the new policy will appear under Policies. It’s time to test our new policy!

**Action 5: Test with the “What If” tool**
The "What If" tool tests the impact of conditional access on a user when signing in under certain conditions. As the policy we created is designed to block access for “test user,” we start by selecting that user. Then, just click “What If” to see what policies, if any, will affect this user.

If you’ve done everything right, you should see something like this:

*Figure 7.18 – The What If tool*
Congratulations! You have successfully enabled Conditional Access. You can verify this by attempting to access Microsoft Search in Bing with the test user account. You will find that it is indeed blocked from signing in at the Bing sign-in screen. (Regular web searches with Bing still work, however.)

![Image](image1.jpg)

*Figure 7.19 – It works!*

After your test is complete, you should sign out of the test user account and sign in as an admin again.

After any sign-in attempt has been made, the event is captured in the Sign-in events log. As an admin, you can access a complete list of sign-in events by clicking on the graph on the main Overview screen.

![Image](image2.jpg)

*Figure 7.20 – Click the graph on the Overview screen to see this list of sign-in events.*
Figure 7.21 – The list of sign-in events can be filtered by user. Here, we see the results of searching for “test”

And when we look in the Failure event:

ERROR

Access has been blocked due to conditional access policies.

Figure 7.22 – The Failure event details screen includes error codes, failure reasons, and other details.

**Action 6: Deploy the policy**

As a final step, you should **include** all other users you want to apply this policy to.

If you run into trouble, try typing a query such as “how to configure conditional access” into the virtual assistant found in the AAD admin center under Troubleshooting + Support.

Figure 7.23 – The virtual assistant can provide guidance on many different topics. Try it if you get stuck.
For more information
See https://docs.microsoft.com/azure/active-directory/conditional-access/ for additional details.
For more information about how to set up your client apps using app-based conditional access or device-based conditional access, see Manage web access using a Microsoft Intune policy-protected browser.
Quiz
Can you tell why the Conditional Access policy shown below is not blocking access in Microsoft Search in Bing?

**Figure 7.24 – Here, we've set the Access controls > Session setting to “Use Conditional Access...”**

**Answer:** The Access controls > Grant should set “Grant” to “Block Access” as shown below. (The Access controls > Session setting here doesn’t apply to Microsoft Search in Bing.)
Figure 7.25 – Remember to test your policies using the What If tool. It’s really handy!
**Action 7: Enable or disable Microsoft Search in Bing for all users**

Unlike the preview version, where users had to be manually whitelisted, and Microsoft Search in Bing had to be explicitly enabled, ‘on’ is now the default setting for new deployments.

Here is how to enable or disable Microsoft Search in Bing for everyone in your organization.

1. In the Microsoft 365 admin center, select **Microsoft Search**
2. Select **Configurations**
3. Select **Set up**

![Figure 7.26 – Microsoft Search in Bing’s on/off switch is now located in the Configurations panel.]

4. Enable or disable the Microsoft Search in Bing service and **Save**.

![Figure 7.27– The on/off setting for Microsoft Search in Bing was formerly found in Services & add-ins]

![Figure 7.28 – It’s on by default]
Action 8: Explore new group policy options

Microsoft Search in Bing works best when all users have their browser’s search default set to Bing. Sure, the new Chromium Edge is preconfigured to use Bing, but some users may switch search defaults unless a group policy is set to prevent users from making changes.

You can do that using the Group Policy Editor, as detailed in the Microsoft Edge documentation for version 77 or newer.

There’s also an enterprise-ready Policy File template to configure Microsoft Edge, available at https://aka.ms/EdgeEnterprise

The download also includes an example file for configuring Microsoft Edge on MacOS.

Figure 7.29– Set default search engine
(Still using Microsoft Edge version 45 or earlier? See https://docs.microsoft.com/microsoft-edge/deploy/group-policies/search-engine-customization-gp#allow-search-engine-customization.)

An administrative template in the Group Policy Editor controls this and other options. Computer Configuration\Administrative Templates\Windows Components\Microsoft Edge\ Note that the “Set default search engine” policy is only applicable to Windows 10 v1703 or newer. For more info, see https://docs.microsoft.com/en-us/microsoft-edge/deploy/group-policies/search-engine-customization-gp

**Edge**
Various group policies are provided for managing Edge browser extensions, as detailed in an article succinctly named Extensions.

**Internet Explorer**
For information on how to set the default search provider for IE11 using GPO, this MSDN post details the steps and requirements. https://blogs.msdn.microsoft.com/askie/2016/12/30/how-to-set-my-default-search-provider-via-gpo/
It is also possible to enable IE11 extensions using administrative templates and group policy.

**Chrome**
A TechNet thread discusses how to install Chrome extensions via GPO.

**Other useful extensions**
In addition to the previously mentioned Content Creator extension, consider using Group Policy to install a useful browser extension called “Microsoft Search in Bing.” This extension (available for Microsoft Edge or Chrome, where it is known as “Microsoft Search in Bing quick access”) provides an easy way for authorized users to access Microsoft Search without leaving the page they’re on.
The extension provides a selection of “suggested searches for you” that can help users explore the capabilities of Microsoft Search; it also provides a “suggest a bookmark for this site” option that allows (non-admin) users to contribute bookmark suggestions.
These are then added as suggested bookmarks to the Microsoft Search admin center, where they can then be reviewed, edited, and published by administrators or Search Editors.

Figure 7.32 – Suggestions are added to the suggested bookmarks list

Figure 7.33 – Microsoft Search also suggests searches based on the languages and query terms you use.
Manage release preferences

Figure 7.34 – The admin can select users to test new releases

Release preferences are found in the Microsoft 365 admin center, under Settings > Organization profile.

Figure 7.35 – Release preferences

The three options are:

1. Standard release – Get updates when we release them broadly.
2. Targeted release for everyone – Get updates early for your entire organization
3. Targeted release for selected users – Pick people to preview updates so that you can prepare your organization

To pick people for option 3, cancel out of the Release preferences panel, then select Release preferences > Actions > Manage people for targeted release
Note that if you have selected “Targeted release for selected users” and the current user is not on the selected users list, you will not be able to see Microsoft Search in the Microsoft 365 admin center’s Settings menu. If you cannot see Microsoft Search under Settings:

1. Ensure that preview mode is on.
2. Add all admins and Search Editors to the “selected users” list
3. When the above two steps are complete, sign out, close the browser, and sign in again. You should now be able to see Microsoft Search under Settings.

Quiz

Q: What is another way to manage a staged rollout?
A: By selected users, by group, by conditional access.

Q: Why is it important to set the default search provider?
A: If Bing is not the search provider, browser searches will not return work results. (The Microsoft Search browser extension will still work, though.)

Q: The “Set default search engine” policy doesn’t work on our Windows 7 machines. Why?
A: The “Set default search engine” policy is only applicable to Windows 10 v1703 or newer.
Appendix 1: Troubleshooting & Support

Overview
After configuring this option, you will be able to:

- Allow users to submit new support requests for Microsoft Search in Bing
- Receive and act upon these requests in the AAD admin center
- Manage the support request fulfilment process

When you click the panel highlighted in Figure A1.1, below, you are taken to a screen that allows you to select various issue types, most of which are fairly self-explanatory. You must select a Service category on this screen in order to be able to progress to the Next: Solutions screen.

![Figure A1.1 – File a new support request](image-url)
After you have specified a Service and provided a Summary and Problem type, you can select the Next: Solutions option. In the example, shown, the reported problem type is related to conditional access settings for Microsoft Search in Bing.

After clicking Next: Solutions, you are taken to a page of Recommended Solution steps and documents—typically, a list of links to documentation on how to configure the required policies or settings. These solutions, when used in combination with the Virtual Assistant and What if options, can help with a wide array of problems.
Figure A1.4 – The Next: Details button takes you to a screen where you can enter further details to help the support engineer troubleshoot the problem.
Table: Support Request Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem details</td>
<td>AADSTS50053 error message, Error message from the application, etc...</td>
</tr>
<tr>
<td>Problem start time</td>
<td>MM/DD/YYYY</td>
</tr>
<tr>
<td>File upload</td>
<td>Choose file to upload</td>
</tr>
<tr>
<td>Consent</td>
<td>Share diagnostic information</td>
</tr>
<tr>
<td>Support method</td>
<td>Technical support - included</td>
</tr>
<tr>
<td>Severity</td>
<td>C - Minimal impact</td>
</tr>
<tr>
<td>Preferred contact method</td>
<td>Contact me later: Email, Call me later: Phone</td>
</tr>
<tr>
<td>Response hours</td>
<td>Business Hours</td>
</tr>
<tr>
<td>Support language</td>
<td>English</td>
</tr>
<tr>
<td>First name</td>
<td>Magan</td>
</tr>
<tr>
<td>Last name</td>
<td>Bowen</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:Magan8@contoso666OnMicrosoft.com">Magan8@contoso666OnMicrosoft.com</a></td>
</tr>
</tbody>
</table>

Figure A1.5 – The **Review + Create** button creates a support request ticket. Note that the user must provide error message details to submit the request.

**Note:** Certain menu items, such as self-service support options, may not be visible to some tenants, but other customers *might* see them, depending on their license and settings.
Appendix 2: Connectors and more

Connectors overview
Connectors allow you to add connections between data sources. You can connect Microsoft Search to a pre-built connector—Microsoft announced the availability of more than 100 at the Microsoft Ignite conference in Nov 2019—or even define your own custom connector. Connectors could, for example, allow your company’s Wiki pages to be included in search results.

Figure A2.1 – Over 100 connectors for Microsoft Search are available, supporting a wide variety of data sources

There are already several Wiki connectors available.
Here’s a searchable list: https://docs.microsoft.com/en-us/microsoftsearch/connectors-gallery
Here’s a Wiki example: https://docs.microsoft.com/en-us/microsoftsearch/mediawiki-connector

Pro Tip: Connectors created in Microsoft Graph are not the only way to connect Microsoft Search to live data sources. One of the tutorial projects for PowerApps, for example, allows a live data connection to an Excel spreadsheet. This is also a type of connector.

Here are some docs to help you get started with this topic.
- Get started: https://docs.microsoft.com/en-us/microsoftsearch/connectors-overview
- For more information, see the Overview for extending the Microsoft Search experience for apps on Microsoft Graph.

PowerBI
Another new Microsoft Search feature is the ability to search for PowerBI dashboards, reports, and apps. See Appendix 4 (or the Microsoft Search blog) for more information about how to find Power BI dashboards, reports and apps using Microsoft Search.
Appendix 3: Products that include support for Microsoft Search in Bing

Microsoft 365 A3
Microsoft 365 A5
Microsoft 365 Business
Microsoft 365 E3
Microsoft 365 E5
Microsoft 365 F1
Office 365 A1
Office 365 A3
Office 365 A5
Office 365 Business Essentials
Office 365 Business Premium
Office 365 E1
Office 365 E3
Office 365 E5
Office 365 Education E1
Office 365 Education E3
Office 365 F1
OneDrive for Business (Plan 1)
OneDrive for Business (Plan 2)
SharePoint Online (Plan 1)
SharePoint Online (Plan 2)
Appendix 4: End-User Cheat Sheet

What can I search for?
These are just a few of the many types of queries Microsoft Search can successfully parse. Give them a try!

**Files** – my files, my documents, my docs, megan’s files, megan’s docs, files about sales, docs about 2018

**People** – me, megan, megan bowen, meganb@contoso.com, megan in marketing, bowen in marketing

**Locations** – my location (returns a URL!), megan’s location, conf rm location, conference location

**Calendar** – my calendar, my appt, my schedule, my meeting, my next meeting, upcoming meeting

**Floor plans** – megan office, megan’s office, megan’s building, where is megan, 2/1172, building 2 floor 1

**Acronyms** – TLA definition, define TLA, expand TLA, acronym TLA, what is TLA, expansion TLA, meaning of TLA

**Q&A** – how do I..., how can I..., when is..., what is... (example: ‘how do I change my password?’)

**Power BI** – Power BI <keyword>, Power BI report <keyword>, Powerbi <keyword>, power bi reports about <keyword>, power bi reports for <keyword>, power bi reports on <keyword>

For more information, see [https://docs.microsoft.com/microsoftsearch/](https://docs.microsoft.com/microsoftsearch/)

Searching for data types
In addition to bookmarks, Q&As, locations, floor plans and other data types already mentioned in this document, there are several other data types we have not mentioned yet that are now (or will soon be) supported.

Here’s a quick summary of these additional data types, all of which can be added and managed in the same way bookmarks are, via the Microsoft Search admin center.

- **Insights**: This is a detailed view of top searches, usage graphs and other metrics data.
- **Acronyms**: display both your organization’s unique definitions and commonly used definitions from public sources. (Usage: define [acronym], e.g., “define SEO”)
- **Result Types**: allows the setting of priorities for various result types, such as web, wiki, etc.
- **Verticals**: allows content sources to be added or disabled.
- **Don’t forget**: If a data repository you need is not being searched, it can be added via a pre-built or custom connector.

**Tip**: Although it is not currently possible to search for specific topics in the admin center, you can create bookmarks for various pages and sections. Here are a few you might find useful:

- Microsoft Search section – [https://admin.microsoft.com/AdminPortal/Home#/MicrosoftSearch](https://admin.microsoft.com/AdminPortal/Home#/MicrosoftSearch)
- Settings – [https://admin.microsoft.com/Adminportal/Home#/SettingsMultiPivot](https://admin.microsoft.com/Adminportal/Home#/SettingsMultiPivot)
- Active users – [https://admin.microsoft.com/Adminportal/Home#/users](https://admin.microsoft.com/Adminportal/Home#/users)
Endnote: Future features

There are numerous features of Microsoft Search we haven’t covered in this training module. Some of the user-focused topics were addressed in the end-user training module and some will be covered in future lessons.

Let us know which topics you’d like to see training materials for, and we’ll get to work on them.

We hope you enjoyed this module. And remember, there’s a whole community of Microsoft Search users and admins at https://resources.techcommunity.microsoft.com/microsoft-search/. We hope to see you there.

Let us know what you think

We welcome your feedback, so we can provide content that’s truly useful and helpful.

Please take a moment to complete our Microsoft Search Admin Survey.
Thanks!