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Introduction

Overview

This training guide introduces you to the tasks you may be asked to perform as Global admins, Search admins, or Search editors in support of Microsoft Search.

We introduce the Search & intelligence 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.

This training guide does not cover usage of Microsoft Search from an end-user perspective, it focuses exclusively on topics relevant to administrators. Enjoy!

Goals

After finishing this guide, 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 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 guide: 90–120 minutes (depending on role).
Administrative tasks and roles

Access to administrative tools is determined by your role. Global admins 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, groups*)</td>
</tr>
<tr>
<td>Assign section admin</td>
<td></td>
<td>Assign user as specialty admin (such as Search admin)</td>
</tr>
<tr>
<td>Assign section editor</td>
<td></td>
<td>Assign customized permissions (such as Search editor)</td>
</tr>
</tbody>
</table>
| Search service management (publish, edit, save, schedule, import/export acronyms, bookmarks, Q&As, locations, etc.) | Search admin  | Can create and manage all aspects of Microsoft Search-specific features  
**Cannot** edit organizational profile; add/edit/remove users, manage groups*, edit licenses, assign roles, configure conditional access, company profile settings, or other AAD settings |
| Create and manage editorial content such as bookmarks, Q&As, locations, floorplans, etc. | Search editor | Same as Search admin                                                         |
| Suggest bookmarks or Q&A                           | User          | No special permissions                                                       |

* Only Global admins or admins who also have the user management role can manage Office 365 Groups.

**Global admin** has complete control over, and complete access to, all enterprise apps and services. Most organizations assign a small number of users as Global admins. These admins, in turn, assign other users as administrators of specific sections. The section administrator for Microsoft Search is known as the Search admin. Only a Global admin can assign the roles of Search admins or Search editors. For more information, see [Set up Microsoft Search](#).

**Search admin:**

- **Full access** to Search & intelligence settings
- **Limited access** to user management options
Cannot access non-Microsoft Search–related areas of the Microsoft 365 admin center or other AAD settings.

Search editor: This role is usually tasked with the management of editorial content such as bookmarks, Q&As, and so on. It has the same permissions and limitations as Search admin.

Which products include Microsoft Search?

Microsoft Search is included with desktop and mobile versions of Office 365 apps, SharePoint Online, OneDrive for Business, Edge, and Bing. For more info, see Overview of Microsoft Search.

Supporting documentation

For each of the lessons, documentation links provide additional details about settings, scripts, and deployment tools. As you review and use them, also take a few minutes to familiarize yourself with this information.
Lesson 1: Explore the Search & intelligence settings

Lesson overview

In this lesson, we will take a look at the Search & intelligence 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:

- Access the Microsoft 365 admin center
- Explore the Search & intelligence Insights dashboard
- Review additional menu items pertaining to Microsoft Search

Time to complete

This lesson takes about 5 minutes.

Action 1: View settings in the Microsoft 365 admin center

The Microsoft 365 admin center is where you’ll probably end up spending most of your time administering Microsoft 365–related features such as Microsoft Search. To view administrative tools and settings, you must be signed in as an admin.

The steps below (and subsequent lessons) assume you are signed in with an admin account.

Important: We recommend using a test account or signing in to a non-production tenant while you’re learning about Microsoft Search admin tasks. This helps ensure you'll maintain access to any corporate resources you usually rely upon. And if, for some reason, you do need to sign in with a different account during this module, verify the account and tenant you’re signed in to before you make any changes.

1. Go to admin.microsoft.com in your browser.
2. You should see a screen that looks similar to one of these:
3. If the left navigation menu is collapsed (first image), click the hamburger icon ➕ to expand it. A menu should appear.

4. Select **Show all > Settings > Search & intelligence**.

   **Tip:** Your admin center screen may look slightly different than the examples shown here. If you see an option to preview the new admin center, set it to **On**.

5. You should see the **Search & intelligence** dashboard:

![Search & intelligence dashboard](image)

Here, you can view and measure top searches, impression distribution by result type, and numerous other data points. Use these metrics to measure the success of your Microsoft Search rollout and adoption efforts.

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

When you expand the left nav menu, you should see the full list of options described here. In this guide, we’ll only be looking at sections that pertain to Microsoft Search. For a complete rundown of all the options, see the [Microsoft 365 admin center help](#).

- Users > Add a user
- Groups > Office 365 groups
- Settings > Search & intelligence
- Settings > Org settings > Organization profile
- Azure Active Directory > Conditional access
Lesson 2: Provision user accounts

Lesson overview

In this lesson, you’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 users
2. Apply licenses (required)
3. Manage roles
4. Fill out each user’s profile with office location, contact information, and other info (optional)

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 by adding a user and then applying a license.

Action 1: Add a test user

One Global admin duty is adding new users. Adding a new user and enabling search-related permissions is a common task well worth learning—and you’ll need to use these skills again in an upcoming lesson. If you don’t need to add any users or already know how to do this, feel free to jump ahead to the Apply a license or Manage roles portions of this lesson.

1. Go to Users > Active users, then select Add a user.
2. In the Set up the basics pane, fill in the basic info for your test user, and then select Next.

   Tip: If you don’t add a first name here, the user’s name won’t appear next to the signed-in icon.

3. In the Assign product licenses pane, select an appropriate product license, and then select Next. To test work search and results, you must select a license that includes
4. In the **Optional settings pane**, click **Next**. You’ll review and edit this user’s role settings in a few minutes.
5. Click **Finish Adding**.
6. You’ll see the user details you entered.

![User details added](image)

7. Click **Close**.

**Action 2: Apply a new license to an existing user**

The steps above describe how to apply a license to a new user account. You can also apply a new license to an existing user. To provision an existing user, you must first select a user.

1. Select **Users > Active Users**.
2. Select a user account to see the account details, where you can add or edit the necessary provisioning information. Also, you can edit the user’s contact information, role, and other
3. Select Licenses and Apps, choose the licenses, and click Save changes. Remember to set up the user accounts you create with an applicable Office 365/Microsoft 365 subscription.
Action 3: Edit roles and permissions

Next, you’ll assign new permissions to an existing user, which is more common than assigning special permissions to a new user.

1. Select **Users > Active Users**.
2. Select a user account to open the user details pane, click **Manage roles**.

   ![User Details Pane]

   - **Account**
   - **Devices**
   - **Licenses and Apps**
   - **Mail**
   - **OneDrive**

   - **Username/E-mail:** AlexW@contoso.com
   - **Manage user name**

   - **Groups**
   - **All Employees**
   - **Leadership**
   - **Mark & Project Team**
   - **10 more**
   - **Manage groups**

   - **Contact Information**
   - **Display Name:** Alex Wilber
   - **First Name:** Alex
   - **Last Name:** Wilber
   - **Phone number:** +1 855 555 0150
   - **Manage contact information**

   - **Office activations**
   - **View Office activations**

3. Select **Admin center access**.
4. Expand **Show all by category** to display a list of predefined specialty roles.
5. In the **Collaboration** section, you’ll notice two search-specific roles: Search admin and Search editor. Select **Search editor** and **Save changes**.

Why assign a Search admin or Search editor role?

As noted in the Introduction to this guide, the Search admin and Search editor roles have the same permissions and limitations. Both are limited to managing features specific to Microsoft Search, such as creating, editing, and publishing Microsoft Search acronyms, bookmarks, locations, Q&A content, and so on. Most organizations have a small number of global admins (at least two) and use specialized admins to limit access rights for these roles to the minimum permissions needed to perform their work, as per the principle of least privilege.

The Global admin can assign any number of users as a Search admin 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.

The Global admin can also create users, assign roles, and assign licenses in the Azure Active Directory (AAD) admin center. There are some features (such as conditional access) that require the use of the AAD admin center. We’ll explore the AAD admin center and learn how to configure conditional access in Lesson 8.
Lesson 3: Add bookmarks and Q&As

Lesson overview

Bookmarks help you publish and promote the best possible results for internal 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 will 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, expiration, or set other 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

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.

1. Go to Search & intelligence in the Microsoft 365 admin center.
2. Select Answers, then Bookmarks.
3. Filter the list to show Draft or Suggested bookmarks.
4. Click a bookmark title, and then click Edit.
5. Review the bookmark details and edit as needed.
6. Select Publish.

New: You can now create custom categories to filter and organize your bookmarks.

For more information, see the Microsoft Search online documentation about Managing bookmarks.
Import SharePoint promoted results and top queries

The Search & intelligence section of the Microsoft 365 admin center provides management tools, including the ability to import and export bookmarks, as well as other answer content. 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. These tools let you leverage users’ actual queries and the work already done to create bookmarks or SharePoint promoted results.

**Action 2: Import SharePoint promoted result query rules**

If you use SharePoint promoted result query rules, you can import the list from your sharepoint.com and sharepoint.com/search default site collection as suggested bookmarks.

1. Go to Bookmarks in the Microsoft 365 admin center.
2. Select Import.
3. On the Import panel, select SharePoint.
4. Click Import from SharePoint.

**Tip:** An in-progress indicator will appear while the system is processing newly imported bookmarks.

Bulk create and import bookmarks

As a Search admin or an editor, you can easily bulk-create new bookmarks and then use the bookmarks import tool to add them to from a .csv file. You can also use the Microsoft Search content creator browser extension to create high-quality bookmarks.

**Action 3: Import bookmarks from a .csv file**

If you have an existing collection of bookmarks, you can easily import them as a .csv file (a list of comma-separated values). With the CSV import option, you can import the list as draft bookmarks into your bookmark collection.

1. Go to Bookmarks in the Microsoft 365 admin center.
2. Select **Import**.

![Import panel](image)

3. On the **Import** panel, select **CSV**.

![Download CSV template](image)

4. Download bookmarks template (BookmarkImportTemplate.csv).
5. Open the CSV file in Excel, add or edit bookmarks as required, and save.
6. In the admin center, upload the completed template.
7. If there are any errors, fix and repeat steps 5 and 6 until the import is successful.
8. Publish draft bookmarks.

If you have any difficulties importing items, please refer to the online documentation for information on how to **prevent import errors**.

**Tip:** To ensure that your imported bookmarks are in the correct format, download the bookmarks CSV template or export an existing bookmarks collection. After editing the CSV file, import your edited bookmarks file from this same panel.

By default, answers (including bookmarks) are imported as **Draft** answers. To automatically publish imported answers, set the Status field of your CSV file to "Published."
**Action 4: Bulk export and edit bookmarks**

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

1. Go to [Bookmarks](#) in the [Microsoft 365 admin center](#).
2. Select [Export](#).
3. Bulk-edit the contents of the .csv file and [Save](#).
4. [Import](#) the edited .csv file.
5. [Publish](#) draft bookmarks.

For more information, see the Microsoft Search online documentation about [Managing bookmarks](#).

**Action 5: Understand your most frequently visited intranet sites**

Understanding the most frequently visited intranet sites (from intranet search logs) can help you identify the best candidates for bookmarks. For more information, see the SharePoint online documentation about [View search usage reports](#).

In addition to Usage Reports that show the number of queries, you can view daily or monthly reports that show top queries, abandoned queries, and no result queries.

**Action 6: Brainstorm other useful topics**

Think about all the sites your users might want to access and then create bookmarks for them. Here are some ideas to get you started:

- Internal sites, documents, resources, and forms users need to access regularly
- Local traffic web pages to help your users 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
- Information on company-sponsored events, conferences, or retreats

**Action 7: Install the Microsoft Search content creator extension**

With the Microsoft Search content creator extension, Search admins or Search editors can publish bookmarks (and Q&As, discussed later in this guide) from the extension or save them as drafts.

Start by verifying the content creator extension has been added to your browser. It’s optional, but so easy to use we highly recommend adding it. Once added, you should see an icon that looks like this:
Versions for Edge and Chrome are available for installation. If you are using the new Chromium-based Edge browser (with the blue green 'wave' icon), choose the Chrome version below.

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

**Action 8: Add a bookmark from the content creator extension**

1. In the upper-right corner of your browser, click the content creator icon.
2. Sign in to an account with Search admin or editor rights.
3. Go to any page, then select the content creator extension.
4. Add a title, URL, description, and keywords or edit the ones that appear.

5. **Select Save to draft** or **Publish**.

In the example below, the published bookmark includes the reserved keywords "microsoft search docs." Using a reserved keyword ensures this bookmark result will *always* appear when a signed-in user searches for "Microsoft Search docs." A reserved keyword can only be used once.
Action 9: Review, edit, and publish bookmarks suggested by others

From the Send feedback link that appears with work results, your users can send suggestions for bookmarks:

- **I want to suggest a link**
  Submissions appear in the Microsoft Search admin center as suggested bookmarks
- **I have general feedback**
  Submissions are sent to the Microsoft Search in Bing team

To review and publish suggested bookmarks:

1. Go to Bookmarks in the Microsoft 365 admin center.
2. Click Applied Filter: Status.
3. Select the Suggested status.
4. Review the bookmark details and edit as needed. When done, select Publish.
Add enterprise Q&As

Enterprise Q&As let you editorially create quick answers for the most frequently asked questions in your organization. Q&As help users discover the answers they need when they search with the keywords you add. Just like bookmarks, you can set up customized answers based on different criteria, including country, security groups, and operating system. One notable difference: Q&As can be formatted with HTML tags.

Supported HTML tags

You can use existing HTML content or add HTML tags to your 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 when a Q&A is added or changed.

**Action 10: Identify top helpdesk and HR issues to set up useful Q&As**

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 commonly asked questions for users to search.
Action 11: Create your Q&A

Access the Search & intelligence section of the Microsoft 365 admin center and enter your organization’s Q&A, including keywords and Q&A settings. Try to put yourself in the user’s mindset by imagining the keywords they will use while searching for the Q&A content you’re creating. As with bookmarks, you can ensure your users always find a specific result by using a reserved keyword.

1. Go to Q&A in the Microsoft 365 admin center.
2. Select +Add to create a new Q&A.
3. As you add or edit the information, the preview automatically updates.

4. Select Save to draft or Publish.

Action 12: Use the content creator extension to edit and publish Q&As

Begin by going to the page or site with the content you want to add as a Q&A and selecting the Microsoft Search content creator icon from your browser’s address bar. Next, select the Add Q&A tab.

In the image below, the Q&A retrieved is well-formatted and adequately addresses our question. You can publish it from within the tool or save it as a draft for later review.
Sometimes, the first answer retrieved is not the best one. Click the right arrow to review the Q&A candidates and choose the best one. If you don’t see good answer candidates, try rephrasing your question.

For more details about creating Q&A, see Manage Q&As.

Conditional publishing

Bookmarks and Q&As can be configured with conditional variables that govern when and where the results appear. For example:

- **Specify countries or regions**, and only users with their browser set to a targeted locale will see that result. 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 result, and it automatically disappears after the date passes.

- **Specify other targets** and results will only appear to members of a specific group, device type, OS, or user location. For example, 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 search results. Search admins and Search editors can suggest, edit, schedule, and publish bookmarks, Q&As, acronym, 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 Plan your content.
Lesson 4: Locations and floor plans

Lesson overview

In this lesson, you will explore the locations and floor plans features, and learn best practices that will help you successfully implement the floor plans. Also covered, is how to find and use the Microsoft Search documentation library.

Objectives

After you complete this lesson you will be able to:

- Create and manage information that helps users find locations and addresses
- Understand how to set up searchable floor plan maps for your organization’s buildings
- Access and navigate the online documentation for Microsoft Search

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 documentation. Take a moment and search for "Microsoft Search docs" now.

Action 1: Find the locations documentation in the Microsoft Search docs

**Note:** It can take several hours for new or changed locations to appear in search results.

1. Go to bing.com and sign in with a work or school account.
2. Search for "microsoft search docs" and select the web result for Overview of Microsoft Search.
3. On the Microsoft Docs site, select Provide answers > Locations in the left nav.
4. In the Manage locations article, follow the instructions under Add or edit a single location.

5. Search admins should add all important locations for your organization.
**Import/export**

Be sure to review the [Manage locations](#) article for important information on how to prevent errors when preparing and importing building location data.

**Floor plans**

Floor plans can help users find office locations for co-workers, meeting rooms, printers, and more in a building. A few sample queries that can be answered by configuring floor plans:

- A meeting room or office location such as 2/1170
- Floor of an office building. For example, building 12, floor 1

- A co-worker's office location. For example, where is Allan's office?

**Prerequisites**

You should complete the following before you configure floor plans. For details about each item, see [Manage floor plans](#).

1. Determine building codes.
2. Review your floor plans.
3. Update office locations on users’ profiles.
4. Verify office locations.
5. Add buildings locations.

Once you are done with the above steps, you can configure floor plans in the admin center.

**Gather and organize office locations**

Before you can add a floor plan, you need to index your office locations. This one-time operation can take up to 48 hours to complete.

1. Go to [Floor plans](#) in the [Microsoft 365 admin center](#).
2. Click **Get started**.

If you do not see **Get started**, this step has already been completed for your organization. Updated office locations for existing and new users are periodically fetched so work results reflect the latest office locations.

**Upload floor plans**

For the complete list of steps and frequently asked questions about uploading, reviewing, and editing floor plans, see [Manage floor plans](#). Also, there are several commercially available tools that can help you create and edit interactive floorplans, including Autodesk DWG TrueView and [Microsoft Visio](#).
Lesson 5: Acronyms

Lesson overview

The Acronyms feature in Microsoft Search helps users find definitions for acronyms. With a simple search, Microsoft Search shows common definitions from your organization and files the user has access to.

In this lesson, you will learn how to manage the administrative aspects of this feature, including adding and publishing custom definitions.

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
- Include or exclude “mined” acronyms using an Exclusions list

Time to complete

This lesson takes about 15 minutes. Acronyms can take up to two days to be discoverable.

Introduction

Imagine you’re in a meeting and someone starts using an acronym like ‘TLA’ in an unfamiliar context. Using Microsoft Search, you can find a custom definition. If an acronym has multiple definitions, you can see those as well by clicking See more in the Acronym answer:

This is particularly useful when acronyms you know, such as SAN (storage area network) or SEO (search engine optimization) mean different things within your organization. Also, Microsoft Search can find and surface acronyms definitions from files shared on your organizations' internal sites, including SharePoint sites, and users’ email:
Like all Microsoft Search results, people outside your organization have no access to your internal acronym results. They’ll see web results similar to the image on the left. Also, your users won’t see acronym answer, like the image on the right, or other work results unless they’re signed in to a work or school account.

When an acronym answer is relevant to a user’s search, it will appear, if there are no relevant definitions from your organization, users will see relevant web results.

For more information about creating and managing acronym results, including frequently asked questions see Manage acronym answers in Microsoft Search.

**Action 1: Add or edit acronyms**

The information needed to create an acronym result is pretty minimal: the acronym, the expanded term or phrase, an optional description, and a source.

1. Go to Acronyms in the Microsoft 365 admin center.

2. Click +Add an acronym, or select an acronym and click Edit.
3. In the panel, enter or edit the details about the acronym and check the updated preview:
   • In the required **Acronym** field enter the acronym or abbreviation
     For example: DNN
   • In the required **Expansion** field enter the definition for the acronym
     For example: deep neural network
   • In the optional **Description** field, enter additional information about the
     For example: A deep neural network is a neural network with a certain level of
     complexity, a neural network with more than two layers
   • In the optional **Source** field, enter a page or site URL where users can get more
     information about the acronym, if left blank your organization name will appear

![DNN Acronym Details](image)

4. Select **Publish** or **Save to Draft**.

**Action 2: Bulk import/export acronyms**

Although you can create and publish acronyms individually using the procedure above, consider using the bulk import and export options if you have a large number of acronyms you want to publish.
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, and then re-import and publish the updates. Or save the .csv files 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.

1. Go to Acronyms in the Microsoft 365 admin center.
2. Select **Export** to download your existing acronym answers in a .csv file.
3. Bulk-edit the contents of the .csv file and **Save**.
4. **Import** the edited .csv file.
5. **Publish** draft acronyms.

For more information, see the article [Bulk Operations for Microsoft Search](#).
Lesson 6: Homepage and Industry News

To make the Bing homepage more relevant to the people in your organization, we recently created a customized version for Microsoft Search in Bing users. This enhanced homepage is personalized for each user, and includes their upcoming meetings, and recent files, along with your organization’s popular bookmarks.

To access and manage the settings for your organization’s Microsoft Search in Bing homepage, go to Microsoft Search in Bing homepage settings (Settings > Org settings > Services) in the Microsoft 365 admin center.

Action 1: Customize your homepage settings

On the Homepage tab, you can control how the Microsoft Search in Bing homepage appears for your users. The homepage preview updates as you select or clear options.

To show personalized information from your organization to signed-in users, including bookmarks, meetings, and recent files, select Display the Microsoft Search in Bing homepage for your organization. If cleared, users will see the same Bing homepage as public web users, even when they’re signed in to a work or school account.

To include a module that displays programmable news articles, select Show editorial news. To program these articles, click the News articles tab.
Action 2: Share internal news articles

Give your users easy access to internal news articles and use start and end dates to keep the content fresh and relevant. On the News articles tab, you can add articles, and use search or filters to find articles that were posted previously.

Adding a news articles is similar to adding a bookmark, but instead of triggering an answer with a search, users will see the article on their personalized Bing homepage. You can add and publish multiple news articles at the same time, but avoid overlapping their start and end dates.

1. Go to Microsoft Search in Bing homepage settings in the Microsoft 365 admin center.
2. On the News article tab, click +Add article.
3. The preview at the top of the panel updates automatically as you enter info.

4. Enter the article details:
   - **Title**: The title of the article.
   - **Description**: A short overview of the article.
   - **Thumbnail image**: Include an optional image to help draw attention to the article.
   - **Start date** and **End date**: When this article should appear and stop appearing on your enhanced homepage. The article will appear at midnight (UTC) on the start date. To add the article immediately, choose today’s date for the start date.
   - **News article URL**: A link to the page or site where users can read the full article.
   - **“See more” URL**: A link to your internal news web site or a page where users can read more articles from your organization.
5. Select **Publish**, or to edit or publish later, select **Save as Draft**.

**Action 3: Customize your industry news feed**

To provide your users with up-to-date news headlines about your industry and info from your organization, use the News service to enable a customized news feed for your organization. Signed-in users that come to the Bing homepage will see your industry news feed under the personalized info from your organization.

As an admin, you control the News feed settings for your organization, including the selected industry and the Bing homepage, Microsoft Edge new tab page, and email experiences. For more information, see the article [Manage Industry news](#).
Lesson 7: Customization options

You can customize many aspects of Microsoft Search, including the navigation options in the admin center, release preferences, and customize color schemes, branding, and logos.

**Action 1: Customize your navigation pane**

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

1. In the left nav, select **Customize navigation**.

   ![Customize navigation pane](image)

2. Select or clear items to show or hide them.

**Action 2: Choose release preferences for your organization**

Release preferences determines how your organization gets new features and service updates. For more information, see [Set up the Standard or Target release options](#).
1. Go to Release preferences in the Microsoft 365 admin center.

2. In the Release preferences panel, select an option and click Save.

3. If you’re limiting targeted releases to select users, click Select users or, to bulk upload a list of users, Upload users.

4. Follow the instructions provided to identify your select users.

**Note:** If you have selected “Targeted release for selected users” and you’re not on the selected users list, you will not be able to access the Search & intelligence settings in the Microsoft 365 admin center.

**If you cannot see Search & intelligence under Settings:**

1. Add all Search admins and Search editors to the “selected users” list.
2. When complete, sign out, close the browser, and sign in again. You should now be able to see Search & intelligence under Settings.
**Action 3: Manage custom themes for your organization**

Use the Configure company branding page in the AAD admin portal to customize Microsoft 365 and Office 365 to reflect your organization’s brand:

![Configure company branding page](image)

You can apply separate branding configuration options for different languages, and you can configure logos for light and dark themes:

![Advanced settings](image)

For more information, see [Add branding to your organization’s Azure Active Directory sign-in page](#).

**Action 4: Allow or forbid user customizations**

In addition to the customizations and settings described above, there are numerous customization options available to the individual end user. While this training guide does not cover user-focused topics, it is worth mentioning topics that may impact an administrator, so you’re prepared to mitigate issues that arise.
Here are a few areas where you may wish to provide a default option, but allow users to customize the Microsoft Search in Bing experience for themselves:

1. Default browser homepage.
2. Choice of browser.
3. Default search engine.
4. Edge new tab page customizations.

It's also possible to specifically prevent these sorts of ad hoc configuration changes using Group Policy settings. A few examples of how to permanently set the default search engine on various browsers are provided in the Admin Essentials guide.
Lesson 8: Control access

Lesson overview

As an admin, you probably already know you can create various types of groups, including distribution lists and security groups. 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

Use 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 members of that group Search editor permissions. To do this, follow the steps described in Actions 1 and 2, below.

Action 1: Add a group

1. Go to Active groups in the Microsoft 365 admin center.
2. Select Add a group.
3. Choose Microsoft 365 (recommended), then click Next.
4. On the Set up the basics panel, name your group and add a concise description.
5. On the **Assign owners** panel, add at least two owners.

6. On the **Edit settings panel**, create an email address for your group, set content as public or private, and create a Teams channel.

7. Review and click **Create group**.

**Note**: It takes approximately 5 minutes for the new group to appear in your groups list. When it appears, continue with Action 2.
Action 2: Add members to the group

Group membership changes take effect immediately.

1. In the groups list, click the group name.

2. Click Members, then click View all and manage members.

3. Click +Add member and search for the person you want to add.
4. In the Results list, select members and click **Save**.

![Add members](image)

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 3: Verify access**

In **Lesson 2**, you learned how to create and assign a test user account. In this lesson, you will verify that the test account can access Microsoft Search in Bing and then learn how to restrict that access.

1. Go to **bing.com**, and click Sign in.
2. On the **Accounts** menu, next to **Work or school account**, click **Connect** and sign in with the test account.
3. Search for my files and verify that Microsoft Search in Bing is enabled for this account. You should see an answer that looks similar to this:

You've verified your test account can access Microsoft Search in Bing. Now let's use Conditional Access to exclude this account.

**Action 4: Configure Conditional Access for Microsoft Search in Bing**

By configuring 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 during a company-wide rollout.

If you haven’t done this before, now is a good time to review Best practices for Conditional Access in Azure Active Directory to ensure that you don’t accidentally lock yourself out. We also recommend reviewing the Azure AD Conditional Access documentation.

**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.

**Include and exclude users:**

1. Go to https://portal.azure.com and sign in with your admin account.
2. Under Azure services, select **Azure Active Directory**.

3. In the left navigation panel, select Enterprise applications.

4. In the **Application Type** menu, choose **Microsoft Applications**, and click **Apply**.
5. Search for "microsoft search" (capitalization doesn't matter).
6. Select "Microsoft Search in Bing" in the results.

7. In the Getting Started section, select the **Conditional Access** tile.
8. Click **New policy** and give it a name.
9. To include the test account in this policy:
   a. Click **Assignments > Users and groups**.
   b. On the **Include** tab, choose **Select Users and groups**.
c. Select 'test user.'

10. To exclude your admin account from this policy, switch to the **Exclude** tab and select your admin account.

11. Click **Done**.

You’ll want to ensure you’ve chosen to **exclude your administrative account** from this test policy—you don’t want to lock yourself out! Remember, a policy designed to block access won’t affect anyone who is excluded from the policy.

**Select impacted app:**
1. Click **Cloud apps or actions** and verify that Microsoft Search in Bing is included.

2. You’re almost there! Now just choose what the policy will do when it’s in effect. Under **Access controls**, select **Grant** > **Block access**, and then click **Select**.
3. Under **Enable policy**, click **On**, then click **Create**.

4. After a brief validation, you should see a “Validation Successful” message, and the new policy will appear under Policies. It’s time to test your 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. Use it to verify the policy you created to block access for the test user:

1. Select “test user” and click **What If** to see what policies, if any, will affect this user.
2. The evaluation results appear with information about the policies that are applied and not applied.

![Evaluation Table]

3. Verify that you have successfully enabled conditional access by attempting to sign in to Microsoft Search in Bing with the test user account. You should find that it is blocked on the Bing sign-in screen. (Signing in to Bing with a personal Microsoft account will still work.)

![Bing Sign-In Block]

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. You can access a complete list of sign-in events by clicking on the graph on the main Overview screen for Microsoft Search in Bing:
In the list of sign-in events, filter by your test user to see the failure event. When you look in the event, you should see that access has been blocked due to conditional access policies:

**Action 6: Deploy the policy**

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

**For more information**

See the [Azure AD Conditional Access documentation](#) 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.
Appendix 1: Connectors and more

Connectors overview

In addition to acronyms, bookmarks, and other result types already mentioned in this document, Microsoft Search can be enhanced to support other data types using Connectors. Go to Connectors in the Microsoft 365 admin center to add and manage your connectors.

You can connect Microsoft Search to a pre-built connector or even define your own custom connector to make these data repositories searchable. Connectors could, for example, allow your company’s Wiki pages to be included in search results.

Additional customization controls are also provided, for example, Result Types allows the setting of priorities for various connector search result types, such as video, wiki, etc. And Verticals allows connector content sources to be added or disabled.

For a list of available connectors, see the Microsoft Graph connectors gallery.

Tip: Connectors created in Microsoft Graph are not the only way to connect Microsoft Search to live data sources. For example, you could use a Power App to create a live data connection to an Excel spreadsheet.

For more information about Microsoft Search connectors, see Overview of Microsoft Graph connectors and Overview of the Microsoft Search API in Microsoft Graph.
Appendix 2: Troubleshooting and support

In the Microsoft Azure admin portal, you can create and manage support requests and tickets. For more information, see Create an Azure support request.

Appendix 3: Sample work searches

What can I search for?

Here are a few of the many types of queries that can return work results. Give them a try!

**Acronyms** – TLA means, what is TLA, define TLA, expand TLA, TLA definition, acronym TLA

**Bookmarks** – [any defined keyword or reserved keyword]. HR, helpdesk, vacation, benefits, etc.

**Calendar** – my calendar, my appts, my schedule, my meeting, my next meeting, upcoming meetings

**Conversations** – my conversations, conversations about [topic], conversations about marketing

**Files** – my files, my docs, my documents, alex’s files, alex’s docs, files about marketing, docs by alex

**Floor plans** – [name’s] office, [name’s] building, 2/1172, building 2 floor 1, Conf Room SHZC 3605

**Groups** – my groups, matt’s groups, distribution lists, social groups, [dept. name] team, sales team

**Locations** – my location, [name’s] location, [building name], city center, Microsoft building 36

**Org charts** – my org, my team, megan’s team, megan’s organization, megan bowen’s organization

**People** – me, my profile, my manager, [first/last name of person in your org], [name] in [department]

**Q&A** – when is..., what is..., where is..., how can I..., how do I... “How do I change my password”, etc.

**Sites** – my sites, HR [or other team name] site, helpdesk site [or any other site name on your intranet]

**Power BI reports and dashboards** – powerbi sales, my powerbi reports

**Note** that query results are personalized to the user and organization and thus may not trigger identically in all cases.
Endnote: Future features

There are numerous features of Microsoft Search we haven’t covered in this training. Some of the user-focused topics were addressed in the end-user training 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 training. 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.