Microsoft Search in Bing

Admin Essentials

Setup and Configuration Tasks

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Introduction

Now that Microsoft Search in Bing is a standard feature of most Office 365 and Microsoft 365 Business and Enterprise editions, it’s time to learn how to effectively deploy this productivity-enhancing tool that makes finding work results simple.

This guide covers the most important administration-related topics that will help you increase Microsoft Search in Bing engagement across your organization—and by doing so, you will help users become more productive get answers faster, find files, locations, people, sites, acronyms, conversations, and more.

This is not intended to be an end-user manual that explains how to use Microsoft Search in Bing. Virtually all the topics listed in this guide pertain to the admin user only.

For the best experience with these learning materials, we recommend that you follow the content in order, because the activities and concepts build upon each other.

**In this guide you’ll learn how to:**

- Enable Microsoft Search in Bing for your users
- Add bookmarks, Q&As, acronyms, locations, and other enterprise resources
- Make Microsoft Search in Bing easy for users to access
- Discover additional resources and documentation

**Who is this guide intended for?** Information technology administrators responsible for configuring and deploying Microsoft Search in Bing for their organization.

**Assumptions:** You have the administrative permissions required to set up and test the Microsoft 365 administration features described in this documentation.
Topic 1: Getting started: Set up Microsoft Search

Microsoft Search is one of the most compelling benefits of running an enterprise edition of Microsoft 365. To introduce your organization to its powerful new work search capabilities, we strongly recommend deploying it in your Microsoft 365 production tenant. This keeps you from having to migrate settings later and increases the quality of the search results, because test environments don’t typically have complete files and Azure Active Directory (AAD) objects.

First things first: You’ll see the terms Global admin, Search admin, and Search editor throughout this guide. Here’s what they mean:

**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 acronyms. It has the same permissions and limitations as Search admin.
<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>
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<tr>
<td>Assign section editor</td>
<td></td>
<td>Assign customized permissions (such as Search editor)</td>
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<tr>
<td>Search service management (publish, edit, save, schedule, import/export, delete acronyms, bookmarks, Q&amp;As, locations)</td>
<td>Search admin</td>
<td>Can create and manage all aspects of Microsoft Search</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cannot edit organizational profile; add/edit/remove users, manage groups*, edit licenses, assign roles, configure conditional access, company profile settings, or other AAD settings</td>
</tr>
<tr>
<td>Create and manage editorial content such as bookmarks, Q&amp;As, locations, floorplans</td>
<td>Search editor</td>
<td>Same as Search admin</td>
</tr>
<tr>
<td>Suggest bookmarks or Q&amp;A</td>
<td>User</td>
<td>No special permissions</td>
</tr>
</tbody>
</table>

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

**Task 1: Set up Microsoft Search bookmarks and Q&As**

Before you enable Microsoft Search in Bing for your users, it’s important to properly configure Microsoft Search and set up some of its key functions. Perhaps the most important of these are bookmarks and Q&As. Microsoft Search bookmarks should highlight key internal resources while Q&As should address the most common questions asked by people in your organization about policies, procedures, and other key topics your users need to know about.

You do not need to create bookmarks for information already discoverable on the public web, Bing already does that. Public web searches will continue to work as your users expect. Rather, focus on creating Microsoft Search bookmarks and Q&As that are specific to your organization. With the help of the bookmarks and Q&As you create, Microsoft Search builds a ‘work search index’ designed to help others at your workplace or school find and access the information resources they need most often.

In this section, you will learn several ways to create and publish relevant bookmarks. (Editing and publishing acronyms, Q&As, locations, and other data types is similar.)

This section assumes that you are signed in with admin permissions to [https://admin.microsoft.com](https://admin.microsoft.com).
**Action 1: Add a new bookmark**  
*Estimated time = 2 minutes*

1. Go to the **Settings** section of the [Microsoft 365 admin center](https://admin.microsoft.com).
2. Under **Search & intelligence**, select **Answers**, then **Bookmarks**.
3. Click **+Add**.
4. Enter a bookmark title, description, keywords, and URL link.
5. Select **Save**.

This saves the bookmark as a draft. You must publish draft bookmarks and suggested bookmarks to make them discoverable to users.

**Action 2: Publish default bookmarks**  
*Estimated time = 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,” edit the bookmark to add the URL for your HR department’s intranet site and then publish.

1. Go to **Bookmarks** in the [Microsoft 365 admin center](https://admin.microsoft.com).
2. Filter the list to show Draft or Suggested bookmarks.
3. Click a bookmark title, and then click **Edit**.

4. Review the bookmark details and edit as needed.

5. Select **Publish**.
To publish multiple bookmarks, select the bookmarks, and then click Publish.

**Tip:** These bookmarks can also serve as examples of how to create your own. By using the default suggested bookmarks as a template, you can better understand how to name your custom bookmarks and how to create effective keywords.

For more information, see the Microsoft Search online documentation about Managing bookmarks.

**Action 3: Bulk import acronyms, bookmarks, locations, and Q&As**

Individually creating and publishing every acronym, bookmark, location, and Q&A result, isn’t a very efficient way to publish a large number of items. Instead, use the bulk import and export options.

The **Import** command provides a convenient way to bulk-import existing acronyms, bookmarks, locations, and Q&As saved as .csv (comma separated value) files. The **Export** command allows you to download a copy of the items you have saved or published for convenient editing or backup. While acronyms, bookmarks, locations, and Q&As are saved and managed separately, the import and export workflows are handled the same way.

If you are starting from scratch, it is best to use the **Download CSV template** option to copy the templates you’ll need for each answer type. These templates contain specific header names and formats you’ll need to preserve to successfully import. Just download the template you need, open it in a spreadsheet program such as Excel and add the info you want to import.

Before any data is imported, it’s validated to ensure that the operation will be successful. When you see “This import is ready,” click the import button to complete the operation.

If the CSV file contains duplicate entries or other issues, you may encounter an error message. If this occurs, click “Open file details” to see the line number with the error and the reason. For example: *The item on line 8*
has a question "How do I reset my password?" that already exists. Open the CSV file in Excel, fix the error and resave, then try importing again.

CSV files containing acronyms (up to 3,000 per file), bookmarks, locations, or Q&As are all imported using a similar interface. The import operation can also update existing items, as shown in the image on the right.

Bookmarks have an additional SharePoint import option that’s covered below. In this section, you’ll practice both methods of bulk-importing bookmarks.

**Import bookmarks using a CSV file**

*Estimated time = 2 minutes to run the tool; publishing time varies*

If you have an existing collection of bookmarks, you can bulk-import them with the CSV import option. They can be imported as draft or published bookmarks. Published bookmarks are discoverable by your users and tracked on the Search & intelligence Insights dashboard.

1. Go to Bookmarks in the Microsoft 365 admin center.
2. Select Import.
3. On the Import panel, select CSV.
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 (see the Publish Bookmarks section for details).

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."

To see bookmarks in the Draft category:

1. Go to Bookmarks in the Microsoft 365 admin center.
2. Click Applied Filter: Status.
3. Select a status: Published, Draft, Scheduled, or Suggested.

4. Click Save.
**Import SharePoint promoted result query rules**  
*Estimated time = 5 minutes to run the tool; publishing time varies*

Bookmarks (but not the other answer types) can also be imported using the **SharePoint** option in the Import bookmarks panel.

Use this import option to automatically create and import bookmarks representing top user search queries, sometimes referred to as SharePoint Promoted results.

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

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

**Tip:** An in progress message appears while importing SharePoint results as bookmarks.

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**Task 2: Create additional high-value bookmarks**

Identify additional high-value bookmarks for your users from your intranet logs and brainstorm with your colleagues. Then, use the bookmark import tool to bulk-create and publish the bookmarks. Or if you prefer, you can use the Content Creator browser extension to assist you.

**Action 1: 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 the best candidates for bookmarks. For more information, see the SharePoint online documentation about [View search usage reports](https://docs.microsoft.com/en-us/sharepoint/adminureporting/search-search-usage).

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 2 (recommended): Use content creator to edit bookmarks**  
*Estimated time: basics = 5 minutes; total time depends on number of bookmarks created*

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 3: Bulk export and edit bookmarks

[Estimated time: bulk export = 1 minute; bulk edit depends on number of bookmarks]

With the bookmark export feature, you can export your existing bookmarks, review and bulk-edit them in a CSV file, and then import the updated bookmarks to make them available to your users. You can also use this tool to save a backup of your organization’s bookmarks collection.

1. Go to Bookmarks in the Microsoft 365 admin center.
2. Click Export.
3. Bulk-edit the contents of the CSV file and save.
4. Import the edited CSV file, see Import bookmarks using a CSV file for more information.
5. Publish draft bookmarks.

For more details, see the online documentation about managing bookmarks.

Action 4: 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:

- Your company’s external, customer-facing web site
- Information on public transit
- Corporate partners who offer discounts on goods or services
- Self-improvement or health and fitness programs at the company and elsewhere
- Information on company-sponsored events, conferences, or retreats

Tip: Encourage your users to send bookmark suggestions using the Feedback and Send feedback links found on every search results page. The I want to suggest a link option submits suggestions directly to the Suggested bookmarks section in the admin center, where admins or editors can then review, edit, and publish them.

Task 3: Publish bookmarks

Once a set of bookmarks has been bulk-imported or otherwise created, it’s up to the search admin or editor (see how to assign these roles) to publish the new bookmarks.
Task 4: Understand 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, you could make an iOS-specific Q&A appear only on iOS.

Security groups, distribution lists, and Office 365 groups are supported as part of the Groups parameter.

Task 5: Add enterprise Q&As, acronyms, and locations

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.
Next, in the Acronyms section, add definitions for any unique acronyms your organization uses, especially if they differ from definitions available on the public web. Then, add Locations for your organization’s offices, warehouses, campuses, and other buildings.

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

*Estimated time = 10 minutes*

Knowing the top helpdesk, HR, and company policy queries generated by the people in your organization can help you create more effective Q&As. 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 entries for your Q&As, acronyms, and locations**

*Estimated time: depends on number of Q&As, acronyms, and locations*

In the admin center, enter Q&As, including keywords and Q&A settings. For more details, see Manage Q&As.

In the Acronyms section, add definitions for any unique acronyms your organization uses. For more details, see Manage acronyms.

In the Locations section, enter building locations (offices, cafeterias, warehouses, and other locations relevant to your organization) that people in your organization are likely to search for. For more details, see Manage locations.

**IMPORTANT:** Unlike bookmarks and Q&As, it can take several hours for new or changed locations to appear in search results.
**Action 3: Use content creator to edit Q&As**

*Estimated time: basics = 5 minutes; total time depends on number of Q&As created*

Yes, this is the same content creator extension discussed in Task 2. Here, we’ll use the **Add Q&A** tab. This tool, which includes formatting options, makes it much easier to create and publish attractive and useful Q&A answers.

In the example on the right, 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.
Task 6: Manage access to files and folders

Certain groups in your organization—like the executive team, HR, or legal department—might not want to make their files visible to people in your organization. For example, your CFO might need to limit access to documents with confidential or sensitive financial information. You can manage both internal and external access to files and folders by adjusting settings on Delve, SharePoint, and OneDrive.

If you opt to not manage access on an organization or group level, your users can individually manage access to their own files and folders. For more info, see Manage access to files and folders in the Microsoft Search in Bing adoption kit (.ZIP download).

Please note that only Global admins can view or update these settings.

Action 1: Limit internal access
[Estimated time = 10 minutes]

Using itemsInsights, you can disable document discovery for your entire organization or a subset of users, including dynamic groups, via Azure AD groups. Once permissions are set, users without access will see a No results message like the image on the right:

For more information, see the Microsoft Graph online documentation about customizing item insights.

Action 2: Limit external access
[Estimated time = 10 minutes]

You can configure sharing settings in SharePoint and OneDrive to determine who people in your organization can collaborate with, both inside and outside your organization.

Depending on your business needs and the sensitivity of your data, you can:

- Disallow sharing with people outside your organization
- Require people outside your organization to authenticate
- Restrict sharing to specified domains

For more information about managing these access settings, see Manage sharing settings or get an overview of Microsoft 365 features that help you keep your organization’s data secure.
Topic 2: Enabling users

In this section, we’ll look at how Microsoft Search works with or without Bing, how to make it easier to sign in to access Microsoft Search in Bing, and how to enable or disable work search functionality in various browsers.

In all versions of Office 365 and Microsoft 365 that include support for Microsoft Search, it is enabled by default. Users can get work results directly from the search box built into the header bar of Office 365 apps, as shown in the What users see section of the Microsoft Search documentation.

Microsoft Search in Bing adds to this functionality by presenting work results in a familiar search results format, where a convenient WORK page makes these results readily accessible.

Work results on Microsoft Search in Bing are not accessible by the public or by other organizations, including Microsoft. Only people in your organization can see these results when they search on Bing.

Also, Microsoft Search strictly adheres to the security and privacy information of the materials it searches. People in your organization can only see and access files, sites, and other resources that they have permissions to.

All that is required to find work results on Bing is for users to sign in with their work or school account and use it to search. All modern browsers are supported, on virtually any desktop or mobile platform.

Task 1: Sign in to Bing

1. On any device, go to bing.com and sign in to your work or school account. It’s the same email and password used for Outlook on the web and SharePoint Online. For example,
Search for **me**. Your profile result should appear:

This is the minimum requirement for accessing Microsoft Search in Bing on a user's device. However, there are several things you can do to make it easier for your users to access Microsoft Search in Bing.

For organizations using the Chromium Edge browser, signing in to Edge with a work or school account also enables additional Microsoft Search features on the New Tab Page.

**Edge New Tab Page options and layouts**

Users that sign in to Edge with their work or school account can customize their new tab page to show personalized work info, including recent Office 365 files and frequently used SharePoint sites, by selecting Office 365. The Microsoft News option displays a selection of recent news, weather, and other info. The page layout options allow showing or hiding the daily background.
Task 2: Make Microsoft Search in Bing easier to access

The simplest way to take advantage of Microsoft Search in Bing is by deploying the new Microsoft Edge browser as the default browser for your organization. With AAD identity integration, Bing as the default search engine, and the work-focused new tab page, finding work content, sites, and resources could not be easier—all while adapting to the existing habits of your users.

If your organization will continue to be a mixed browser environment with Google Chrome, either as your default browser or as a supported browser, Microsoft Search can help your Chrome users easily find work results, too.

In the Microsoft 365 admin center, you can enable Microsoft Search in Bing for Google Chrome users by setting Bing as your default search engine and installing the Microsoft Search in Bing quick access extension. The extension provides seamless access to the work results page.

We recommend testing the extension prior to mass-deployment.

How to test the extension

The MicrosoftSearchInBing.msi is a standalone installer for the Microsoft Search in Bing quick access Chrome extension created for organizations that have Microsoft Search as part of their Microsoft 365 subscription, but aren’t using Microsoft 365 Apps for enterprise (formerly Office ProPlus). Testing is recommended, but optional. Testing can be done before or after updating to Microsoft 365 Apps for enterprise Version 2005 or newer. (The mass-deployment installation becomes even simpler after Version 2005 or newer.)

To install the standalone extension:

Only organizations running a version of Microsoft 365 Apps for enterprise earlier than Version 2005 need to download and install the standalone extension.

1. Download the standalone installer package from Microsoft.
2. Install the extension.
3. Reboot the device to enable the search extension.
To use the extension, open Chrome and click the extension icon 🕵️.

**Tip:** To help your users find work info faster, a Bing work results page always appears for searches made from the Microsoft Search in Bing quick access extension. Users won’t see web results for these searches by default.

Here’s what the Microsoft Search in Bing quick access extension looks like for signed out and signed in users.

![Microsoft Search in Bing extension](image.png)

When you’ve finished testing and are ready to begin mass deployment, you may wish to uninstall the extension. Or you can leave it installed. The mass deployment option configured via the admin center won’t be negatively affected in either case.

For information about uninstalling the search extension after testing, see [How to remove the background service for Microsoft Search in Bing after it’s been installed](#).

Users who don’t want Bing as their default search engine can revert to their previous default setting by turning **Use Bing as your default search engine** off. They can still use the extension to search and searches made from the extension will still show work results by default.

This is by far the easiest way to make Microsoft Search in Bing accessible to Chrome users. If you are interested in deploying Bing as the default search engine to users without the ability to revert to their previous settings, see the section on setting a default search engine via [Group Policy](#).

**Prerequisites**
The option to set Bing as the default search engine and install the extension is currently supported for the following configuration only:

**Supported configuration**
- Your organization’s locations are limited to these regions: Australia, Canada, France, Germany, India, the United Kingdom, and the United States
- Bing is not currently the default search engine for Chrome users in your organization
- Device is domain-joined
• License includes Microsoft 365 Apps for enterprise (formerly Office 365 ProPlus) and devices have been updated to Version 2005 or newer

For devices that meet the first three requirements above—locations, Chrome default search engine isn't set to Bing, and device is domain-joined—install the standalone extension for testing is supported.

To successfully test setting defaults across your organization, you’ll need to opt-in to set Bing as your default search engine and deploy the search extension.

If your environment does not support this configuration, please use an alternative method such as Group Policy to configure the browser and search defaults. The extension can be used to perform Bing work searches, even if the Background service for Microsoft Search in Bing is not installed.

**When the default search engine and extension are configured:**

• Installation occurs only on domain-joined devices in supported regions
• If Bing is already the default search engine, the extension doesn’t get installed
  The extension allows users to revert to their previous search engine setting at any time

**To set Bing as your default search engine and deploy the search extension:**

1. Go to Configurations in the Microsoft 365 admin center.
2. Under Change Microsoft Search in Bing settings, click Edit.
3. In the panel, turn on Allow your organization to use Microsoft Search in Bing.
4. Select the Install extension and set Bing as the default search engine check box.
5. Use Extension settings, to configure who gets access to the extension. You can choose Everyone in your organization or, to give access to a subset of your users, choose Specific groups in your organization.
For details on how to deploy, see Microsoft Search in Bing and Microsoft 365 Apps for enterprise.

Once deployed, users can easily revert to their previous default search engine setting by opening the extension and turning off the setting to use Bing:

![Use Bing as your default search engine](image)

But that’s not all this extension does. In fact, it has several useful functions.

Most obviously, it provides a search box that enables Chrome to perform work searches, landing the user directly on the work results page for your organization. It also provides work-centric search suggestions to encourage new users to try searching their organization. And, even if Bing is not set as the default search engine, the search box in the extension provides quick access to work results.

In short, it makes searching easier, it puts the ability to easily switch search engines in the hands of users, and it helps teach users how to use Microsoft Search. So, pretty handy overall.

For more information, see Microsoft Search in Bing and Microsoft 365 Apps for enterprise.

**Use Group Policy**

- Microsoft Search in Bing works best when all users have their browser’s search default set to Bing. 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 allow or disallow search engine customization using the Group Policy Editor
- An administrative template in the Group Policy Editor controls this and other options (Computer Configuration\Administrative Templates\Windows Components\Microsoft Edge)
**Note:** The Set default search engine policy is only applicable to Windows 10 v1703 or newer. For more information, review the documentation that applies to your browser environment.

For Microsoft Edge version 77 or later, see the Microsoft Edge documentation.

For Microsoft Edge version 45 and earlier, refer to the topic about Search engine customization.

**Microsoft Edge**

Various group policies are provided for managing extensions, as detailed in the Extensions documentation library.

**Google Chrome**

A TechNet thread discusses how to install Chrome extensions via GPO. (Chrome extensions can also be used with the Chromium version of Edge.)

If the admin center option to auto-install and enable the extension is not supported in your environment, we recommend using Group Policy to install the Microsoft Search in Bing extension for Edge (legacy versions) or Chrome and Chromium versions of Edge on your domain-joined devices.

**Microsoft Internet Explorer**

It is also possible to enable IE11 extensions using administrative templates and group policy.

For information on how to set the default search provider for IE11 using Group Policy, this MSDN post details the steps and requirements.

**What your users will see with Microsoft Search in Bing**

For information about what users will see after the Microsoft Search extension is installed and their device is rebooted, see What your user will see with Microsoft Search in Bing.

**Disable Microsoft Search in Bing for all users**

We hope you’ll never need to use this option, but just in case, here’s how to disable Microsoft Search in Bing for everyone in your organization.

1. Go to Configurations in the Microsoft 365 admin center.
2. Select **Edit**.

3. Turn **Allow your organization to use Microsoft Search in Bing** off.

4. Click **Save**.
Topic 3: Set up Conditional Access

Overview
In this lesson, you will learn how to configure Conditional Access, which allows you to control which users can access a specific service such as Microsoft Search in Bing. This feature requires configuration in the Azure Active Directory section of the Azure admin portal.

Assuming that you have administrative access and an applicable Microsoft 365 license, Conditional Access can be used to limit access to a specific application or service. For example, you could use it to deploy Microsoft Search in Bing in multiple stages as groups complete a training session.

If you haven’t done this before, review best practices for conditional access to ensure that you don’t accidentally lock yourself out.

Objectives
• Configure and test Conditional Access settings
• Test configurations with the What If tool

Task 1: Verify access
Sign in with a test account and verify that the test account can access Microsoft Search in Bing.

1. Open your browser and sign in to bing.com with a work or school account.

2. Search for my files and verify that work results appear. You should see a result that looks something like this:
Success! Your test account can access Microsoft Search in Bing. Now, let’s exclude this account via Conditional Access.

**Task 2: Enable Conditional Access**

1. Sign in to the AAD admin center as a Global admin from the Microsoft Search in Bing | Overview page.
2. On the Security menu, select **Conditional Access**.

3. Include and exclude certain users using a new policy. Click **New policy** and give it a name. Let’s **include** our test user.
   a. Click **Assignments > Users and groups**.
   b. On the **Include** tab, choose **Select users and groups**.
   c. Select the **Users and groups** check box.
   d. Select your test account.
e. Switch to the **Exclude** tab and repeat these steps to select your admin account.

![Azure Active Directory admin center](image)

f. Click **Done**.

In this example, we've chosen to **include** the test account and **exclude** the administrative account from this policy—you don’t want to lock yourself out if you apply a policy like this to all users! Remember, a policy designed to block access won’t affect anyone who is excluded from the policy.

4. Include the app or service you want the 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." (The red error indicators appear until you complete this step.)
5. You’re almost there! Now just tell the policy what to do when it’s in effect. In this case, you want it to Block. From **Access controls > Grant > Block access**, click **Select**.

![Access controls Block access](image)

6. Click **Enable policy On** and click **Create** to create the new policy.

7. After a brief validation step, you should see a "Validation Successful" message and the new policy appears under Policies. It’s time to test your new policy!

**Task 3: 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. The policy detailed above blocks access for a “test user”, so start by selecting that user. Then, click **What If** to see what policies, if any, will affect this user.

![What If test](image)

If you’ve done everything right, you should see something like this:
If you lock yourself out, you’ll need to ask another admin to disable the policy.

To verify that you have successfully enabled conditional access, try signing in to Microsoft Search in Bing with the test user account. You should find that you’re blocked. (Signing in to Bing with a personal Microsoft account will still work.)

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.

Click on the policy name in the Details section to look at the ‘Failure’ event:
Task 4: Deploy the policy

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

For more information
See Azure AD Conditional Access documentation for additional details.
Topic 4: Send communications and conduct training

Now that you’ve set up Microsoft Search in Bing, the next step is to let users know about it, keep them up to date on new features, and offer training. We’ve made this as easy as possible by creating content that you can customize and provide to your users as part of a Microsoft Search in Bing Adoption Kit that you can share with your customers.

**Action 1: Get the Adoption Kit**
Download Microsoft Search in Bing Adoption Kit, which includes a launch announcement email template, one-page PDFs about the benefits and features of Microsoft Search, and a short PowerPoint deck you can customize for training sessions.

**Action 2: Share kit materials**
Let users know about how your org has customized Microsoft Search in Bing to provide relevant bookmarks, acronyms, locations, and other answer types. Highlight an HR bookmark, a handy Q&A, or another useful work-search feature and its benefits, with brief instructions on how to use it. We encourage you to share these communications with your users on SharePoint, Teams, Yammer, or your organization’s other communication channels.

**Action 3: Send the launch email to users**
Customize the email template from the Adoption Kit and use it to announce your org’s launch of Microsoft Search in Bing. Share a few sample queries demonstrating how to find people, files, and more. We also recommend linking to your internal SharePoint site or Teams channel.

**Action 4: Schedule a Microsoft Search training session**
The training provides an overview of Microsoft Search, a demonstration of Microsoft Search in Bing, and how your users can provide feedback.

A variety of training materials are available.

1. User training: Presentation in the Adoption Kit.
3. Online: How-to videos and blog posts.

**Action 5: Request feedback from your users**
Ask for feedback from your users, either through your organization’s feedback channels or by using the feedback links in search results.
Task 1: Review supporting documentation and additional resources

Microsoft Search in Bing documentation is available to answer your questions, support your implementation, and help you and your users succeed.

- Microsoft Search setup help
- Microsoft Search overview and tutorial videos
- Microsoft Search content planning help
- Microsoft Search Bookmark management
- Microsoft Search Enterprise Q&A management
- Microsoft Search Acronyms management
- Microsoft Search Locations management
- Microsoft Search Floor plans management

Yammer

Microsoft Search in Bing has a private Yammer group for IT Admins to share experiences and learn from each other. If you haven't already joined, please ask your Microsoft team contact for an invitation.
**Actions checklist**

Following is a handy checklist to track your deployment and engagement efforts.

- Assign search admins and search editors
- Publish default bookmarks
- Import SharePoint promoted results (Best Bets) and top queries
- Understand your most frequently visited intranet sites
- Brainstorm other useful topics
- Download templates for acronyms, bookmarks, locations, and Q&As
- Bulk create and import acronyms, bookmarks, and locations
- Identify top helpdesk and HR issues to set up useful Q&As
- Create your Q&As
- Manage internal and external access to files and folders
- (Chrome only) Set Microsoft Search in Bing as default search engine and deploy the Microsoft Search in Bing quick access extension
- Configure Conditional Access if needed
- Download the Microsoft Search in Bing Adoption Kit for deployment guidance
- Review the Adoption Kit contents and customize as needed
- Share new feature communications
- Send the launch email to users
- Schedule a Microsoft Search end-user training session
- Request feedback from your users