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Introduction

Now that Microsoft Search in Bing is a standard feature of most Office 365 Business and Enterprise editions (see the full list here), it's time to learn how to effectively deploy this productivity-enhancing tool that makes finding work results as simple as a search. If you haven’t already done so, a great place to start is letting employees at your company know about the capabilities of Microsoft Search, with the help of the tools we supply in the Microsoft Search in Bing Adoption Kit.

This short training course covers administration-related topics that will help you increase Microsoft Search in Bing engagement across your organization—and by doing so, you will help users to get answers faster, find files, locations, people, and conversations, and become more productive.

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

For the best experience with these training 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:

- Add bookmarks, Q&As, acronyms, locations, floor plans, and other enterprise resources
- Make Microsoft Search in Bing easy for users to access
- Leverage communications and training documentation

Who is this guide intended for? Information technology administrators responsible for deploying and rolling out Microsoft Search in Bing at their company.

Assumptions: You have a working knowledge of Microsoft Search and have the administrative permissions required to set up and test the described features in this documentation.
**Getting started**

Microsoft Search is one of the most compelling benefits of running an enterprise edition of Microsoft Office 365; to introduce your organization to its powerful new ‘work search’ capabilities, we strongly recommend deploying it in your Office 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. Download and review the Microsoft Search in Bing Adoption Kit for more ‘Getting Started’ tips.

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. Hence, most organizations should assign a small number of users as Global Admins. These admins will, in turn, then 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 Microsoft Search settings: publish, edit, save, schedule, import/export acronyms, bookmarks, Q&As, locations, and other settings; enable new guest user
- **Limited access** to user management: Export users, search, filter users (no ‘Assign Roles’, ‘Add’ or ‘Delete’); customize navigation.
- **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); edit licenses, company profile settings, many other AAD settings.
**Search Editor:** This role is usually tasked with the creation and management of editorial content such as bookmarks, Q&As, and locations. (It has exactly the same permissions as Search Admin.)

**Top Task: Set up Microsoft Search bookmarks and enterprise Q&A**

Bookmarks help you publish and promote the best possible results for business-related queries. By creating bookmarks to the most important resources across your organization, you add value to these resources and benefit users. In this section, you will learn several ways to quickly and easily create relevant published bookmarks. This section assumes that you are signed in with admin permissions to https://admin.microsoft.com.

**Action 1: Add a new bookmark**

*Estimated time = 2 minutes*

1. If necessary, expand the left menu of the admin center with Show all

   ![Show all](image1)

   *Figure 1.1 – Show all*

2. Select Settings > Microsoft Search

   ![Microsoft Search](image2)

   *Figure 1.2 – Select Settings > Microsoft Search*

3. Select Bookmarks

   ![Microsoft Search](image3)

   *Figure 1.3 – Select Bookmarks*

4. Click +Add
5. Enter bookmark title, description and URL link
6. Save
This saves the bookmark as a draft. You must publish draft bookmarks and suggested bookmarks before they are visible to other users.

**Action 1: 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", add the URL for your HR department's intranet site and then publish.

**To publish:**

1. Sign in to [https://admin.microsoft.com](https://admin.microsoft.com) and click **Settings**.
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. Clicking on the bookmark title allows you to **Edit** the bookmark.
6. Review the bookmark details and edit as needed. When done, select **Publish**
Figure 1.5 – Edit drafts

Contoso Human Resources (HR)

Edit  History

Contoso Human Resources (HR)
https://contosohr.com

The main Contoso Human Resources hub has information on everything you need to know about working at our company, from the employee handbook and company holidays, to financial information like your W2 and paystubs.

Title *
Contoso Human Resources (HR)

URL *
https://contosohr.com

Publish  Save to draft

Figure 1.6 – After editing a bookmark, choose Publish or Save to draft.
Figure 1.7 – Select the checkmark next to one or more bookmarks to reveal options to Publish or Delete the bookmark(s).

**Tip:** These bookmarks also serve as examples 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 enables Microsoft Search. For more details, see the Microsoft Search bookmarks support page.

**Bulk import acronyms, bookmarks, locations, and Q&As**

Although you could individually create and publish every acronym, bookmark, locations and Q&A entry using the single-item publishing procedure described above, it isn’t a very efficient way to publish a large number of items. Instead, use the bulk import and export options.

Inside the Settings > Microsoft Search area of the Microsoft 365 admin portal, you have access to import and export tools provided by Microsoft Search. The **Import** command provides a seamless way to import a list of existing bookmarks; the **Export** command allows you to download and save a copy of the items you have saved or published for convenient editing or backup. The exported files are saved as a CSV (comma separated value) file.

It’s also possible to automatically create and import bookmarks representing top user search queries; these SharePoint promoted result query rules are sometimes referred to as Best Bets. You can also import top SharePoint queries using PowerShell. Each of these methods are described in this section.

These tools let you leverage users’ actual queries and the work you may already have done in creating your Best Bets. If, however, you are starting from scratch, it is best to **Export** a copy of the template for each category so that you will have the correct header names and formats. Then, you can simply open the resulting .csv files in a spreadsheet program such as Excel and
add the terms you wish to import into each template. Be sure to save your work before proceeding.

The **Import** command provides a way to import lists of acronyms, bookmarks, and Q&As saved as CSV files. When you attempt an import operation, the input data is validated to ensure that the operation will be successful. When you see “This import is ready”, simply click the import button to complete the operation.

![Import acronyms](image)

*Figure 1.8 – Import acronyms*

Acronyms (up to 3,000 per batch), bookmarks, and Q&As are all imported via a similar interface. Similarly, the import operation can also handle updating existing items, as shown below.
If the list contains missing headers or other issues, you may encounter an error message. If this occurs, click on “Open file details” (below the error message) to see how to mitigate the issue.
Clicking “Open file details” will display the line number(s) on which the error occurred and the reason the error occurred. 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.

**Import SharePoint promoted results (Best Bets) and top queries**

In addition to the above-mentioned CSV method, bookmarks (but not the other data types) can be imported using the “SharePoint” option in the Import bookmarks dialog. This will import the SharePoint Promoted results as suggested bookmarks.
It's also possible—albeit not quite as easy—to Import top SharePoint queries using PowerShell. In each case, these tools let you leverage users’ actual queries and the work you already did in creating your Best Bets.

In this section, you’ll practice each of the three methods of importing bookmarks.

**Action 1: 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 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.

1. Sign in to [https://admin.microsoft.com](https://admin.microsoft.com) and click **Settings**.
2. Select **Settings > Microsoft Search > Bookmarks**
3. Select **Import**
4. From the **Import** panel, select **CSV**

![Import bookmarks window](image)

*Figure 1.14 – Bulk-import bookmarks using a CSV file*

5. If you already have a CSV file, jump to step 7
6. Download bookmarks template (.csv)
7. Open the .csv file in Excel, add or edit a bookmark, and save
8. Switch back to the admin center and upload the completed template
9. If there are any errors, repeat steps 7-9 until the import is successful
10. **Publish** draft bookmarks (described in more detail in the Publish Bookmarks section)

**Tip:** download the bookmarks template or export an existing bookmarks collection to ensure that your imported bookmarks will be in the correct format. After you've completed your edits, you can import your edited copy of the template directly from this panel.

By default, the imported bookmarks appear in the **Draft** tab on the bookmarks page of the Microsoft Search admin center. Imports are quick; publishing time varies depending on how many bookmarks you have.

Set the Status field of your CSV file to “Published” to automatically publish imported acronyms, bookmarks or Q&As.
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 collections as bookmarks using the Import option found in the Microsoft Search admin center.

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 of your portal, so you can easily publish to your Microsoft Search users. Publishing time varies depending on how many bookmarks you have.

**Action 3 (optional): 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. This exercise is optional, as it is somewhat more complex than the previous two examples. It does, however, reveal the power and flexibility of PowerShell scripting in several of its advanced command-line options.

The PowerShell script does the following:

- Prompts you for your SharePoint administrator credentials (required)
- 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

**Note:** Once the PowerShell script runs, either the Search Admin or Editor must go to the Suggested bookmarks within the admin portal and approve the newly imported bookmarks before being published.

Download the script [here](https://aka.ms/ImportSPQueries).

When you run the script, you'll be prompted for your SharePoint administrator credentials. Then, the script will run a SharePoint search for each of the top queries to get the top search result. It then imports these results as suggested bookmarks. You can make any necessary edits before publishing.

1. To get started, download [https://aka.ms/ImportSPQueries](https://aka.ms/ImportSPQueries)
2. Unzip the “SharepointTopQueryBookmarks.ps1” PowerShell script.
3. Right-click the script and select “Run with PowerShell.”

*Figure 1.17 – Right-click the script to run*
4. At the AdminEmailAddress prompt, type or paste your admin email address and hit Enter.
5. At the Password prompt, type or paste your password.

![Image 1.18 – Enter your admin email address and password](image)

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

![Image 1.19 – PowerShell script execution](image)

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.

**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 -Debug -Verbose -SafeMode"
```

If you see a “Running scripts is disabled on this system” error message, open PowerShell as an administrator and execute the following command, then select the “Y” option:

```
set-executionpolicy remotesigned
```

While you are learning how to use this script, you may want to use the SafeMode switch to avoid changing the currently published bookmarks on your site.
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 these optional parameters.

The output of this script depends upon your site’s top queries, of course.

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 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 in creating top-quality bookmarks.

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. Here, we’re looking at the SharePoint admin center.

Figure 1.20 –SharePoint Usage Reports (found in the SharePoint admin center) reveal users’ top queries
View Usage Reports
See how often your users search, what their top queries are, and which queries they're having trouble getting answers for.
**Action 2 (optional): Use Content Creator to edit bookmarks & Q&As**

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

Start by checking to see if the Microsoft Search Content Creator extension is already installed on your browser. It’s optional, but so easy to use we highly recommend installing it. Once installed, you should see an icon to the right of your browser’s address bar that looks like this:

Versions for Edge and Chrome are available for installation. If you are using the new Chromium-powered Edge browser, choose the Chrome version below.

![aka.ms/ContentCreator-Edge](aka.ms/ContentCreator-Edge)

This extension enables Microsoft Search Admins or Search Editors to directly publish bookmarks and Q&As from the extension or save them as drafts to review within the admin center before publishing. (You can manage users and set up Search Admin and Search Editor roles in the admin center.)

![Microsoft Search Admin portal content creator](Microsoft Search Admin portal content creator)

*Figure 1.21 – The Content Creator makes bookmark & Q&A creation easier.*
**Action 3: 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
- 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
- Information on company-sponsored events, conferences, or retreats

**Publish bookmarks**

Once a set of bookmarks has been bulk-imported or otherwise created, it’s up to the search administrator or search editor (see how to assign these roles) to publish the new bookmarks.

**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 picnic, 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.
Conditional bookmarks can target specific SGs, DLs, or O365 groups.

Security Groups, Distribution Lists, and Office 365 groups are supported as part of the Groups parameter shown in Figures 1.22 and 1.23.

**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.

1. Sign in to [https://admin.microsoft.com](https://admin.microsoft.com) and click **Settings**
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 3
6. **Publish** draft bookmarks

For more details, see the [Microsoft Search bookmarks support page](https://admin.microsoft.com).

**Add Enterprise Q&A**

Enterprise Q&A lets you editorially create quick answers for the most frequently asked questions in your organization. Q&As help users to 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.
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 entries for your Q&A and locations  
*Estimated time: depends on number of Q&As and locations*

Access the admin portal and enter your organization’s Q&As, including keywords and Q&A settings. For more details, see the Q&A management page in the Microsoft Search documentation library.

Then, select the Locations tab and enter building locations (offices, cafeterias, warehouses, etc.) that people in your organization are likely to search for.

**Note:** Unlike bookmarks and Q&A, the indexing of locations does not occur immediately, and it can take several hours for new or changed locations to appear in search results.
Action 3: Use Content Creator to edit bookmarks & Q&As

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

Figure 1.26 – In this example, 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.

Figure 1.27 – Sometimes, the first answer retrieved is not the best one. In this example, 10 results were returned. In a case like this, you should 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.
Topic 2: Make Microsoft Search in Bing easier to access
In this lesson, we’ll look at how to make it easier to sign in to access Microsoft Search in Bing, and how to enable or disable work search functionality.

Action 1: Download Windows 10 accounts extension for single sign-on
[Estimated time = 5 minutes to download and install] This browser extension helps Chrome users smoothly sign in to supported web sites on Windows 10 without having to repeatedly provide credentials. If some of your Windows 10 users use Chrome, be sure to share it with them. We recommend that you create a group policy to automatically install this Chrome extension.

Get the Chrome extension here.

Note: If your organization is planning to implement a conditional access policy (detailed in Topic 3), Chrome users will need to have this extension installed and enabled. Currently, this extension supports Azure Active Directory identities.

Action 2: Test single sign-on
[Estimated time: depends on your IT and security settings] Set up single sign-on so users don’t have to repeatedly provide their credentials. We suggest you test with a couple of users to identify any configuration issues that might be blocking single sign-on.

Action 3: Set default search engine
[Estimated time = 5 minutes] Many people enter search queries directly from their browser address bar, rather than navigating to a search engine home page, because it saves them time and clicks. And, because Microsoft Search directly supports ‘work search’ queries entered into Bing, it is the only search engine that provides full access to the capabilities of Microsoft Search. Because of this, we encourage you to use a group policy to set Bing as the default browser search engine for your managed systems. (Users can, of course, keep bookmarks for any other search tools they may use.) If you have any questions on how to do this, reach out to your Microsoft Search

Figure 2.1 – Group Policy controls for the legacy version of Edge
support contact.
Expert Tip: Use Group Policy

- Microsoft Search in Bing works best when all users have their browser’s search default set to Bing. Sure, 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 at 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 information, select the documentation that applies to your browser environment.

For Microsoft Edge version 77 or newer, see the documentation landing page at https://docs.microsoft.com/DeployEdge/

For Microsoft Edge version 45 and earlier, refer to https://docs.microsoft.com/microsoft-edge/deploy/group-policies/search-engine-customization-gp

**Edge**

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

**Chrome**

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

We recommend using Group Policy to install the Microsoft Search in Bing extension for Edge or Chrome on your users’ PCs.

**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 GPO, this MSDN post details the steps and requirements.
**Action 4: Enable or disable Microsoft Search 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** (yes, this panel seems a bit pointless to us, too. More options in the future, maybe?)
4. Enable or disable the Microsoft Search in Bing service and **Save**.

---

*Figure 2.2 – Microsoft Search in Bing’s on/off switch (formerly found in Services & add-ins) is now located in the Configurations panel.*

*Figure 2.3 – Allow use of Microsoft Search in Bing*

*Figure 2.4 – It’s on by default*
Topic 3: Set Up Conditional Access

3. Conditional Access

Secure access to this application with a customizable access policy.

Overview

In this lesson, you will learn how to configure the advanced feature called 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.

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 completed a training session.

Assuming that you have administrative access and an applicable Office 365 license, and an applicable Office 365 license, here's how to use it to limit access to Microsoft Search in Bing to a specific subset of users. 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.

Objectives

- Configure and test Conditional Access settings
- Test configurations with the ‘What If’ tool

Time to complete

This lesson takes about 15 minutes

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 using the “Work or school account” option.

   ![Sign in with the “Work or school account” option.](image)

2. 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:
Success! You now know your test account can access Microsoft Search in Bing. Now, let’s exclude this account via Conditional Access.

**Action 1: Enable Conditional Access**

1. Start by signing into the AAD admin center as a global admin, via the Microsoft Search in Bing - Getting Started page. From the Security menu, choose Conditional Access.

   ![Image of Conditional Access in Microsoft Search in Bing](image)

   **Figure 3.3 – Use the guidance in the Get started section to create your first policy.**

   **Tip:** You can place Conditional Access (or any other frequently used resource) in the “Favorites” area of the left column by selecting “All services” and searching for the word “conditional”, then clicking the star next to the search result, as shown in figure 3.4.
2. We will **include** and **exclude** certain users in a new policy. 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 your admin account
   e. Click **Done** when both selections have been made

In the screenshot on the right of Figure 3.5, we’ve chosen to **exclude** the administrative account from this test 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.
3. 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.”

![Image of the Microsoft Search in Bing settings]

*Figure 3.6 – The system will warn you if you try to exclude administrative roles—but be careful!*

4. You’re almost there! Now that you’ve selected the users who will and won’t be affected, and the app this policy applies to, you just have to tell the policy what to do when it’s in effect. In this case, you want it to “Block.” So, select **Block** from **Access controls > Grant**, then click **Select**.
Figure 3.7 – Set the Grant value to “Block access” for the user(s) you want to block.

5. When all of these steps are completed, click **Enable policy** ‘on’ and then click **Create** to create the new policy.

6. 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!

**Action 2: 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 you created is designed to block access for “test user”, start by selecting that user. Then, 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 3.8 – 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 of test user sign-in fail](image-url)

*Figure 3.9 – It works!*

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.

![Image of Sign-in events graph](image-url)

*Figure 3.10 – Click the graph on the Overview screen to see this list of sign-in events.*
Figure 3.11 – The list of sign-in events can be filtered by user. Here, you can see the results of searching for “test”.

Click on the policy name in the Details section to take a look at the ‘Failure’ event.

![Failure event details screen](image)

Figure 3.12 – The Failure event details screen includes error codes, failure reasons, and other details.

**Action 3: 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 Azure Active Directory admin center under Troubleshooting + Support.

![Virtual Assistant](image)

Figure 3.13 – 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/](https://docs.microsoft.com/azure/active-directory/conditional-access/) for additional details.

**Quiz:** Can you tell why the Conditional Access policy shown below is not blocking access in Microsoft Search in Bing?

![Figure 3.14 – Set Access Controls to Block and specify the user and apps you want to include.](image)

**Answer:** The **Access controls > Grant** should set “Grant” to “Block Access” as shown in Figure 3.15. (The **Access controls > Session** setting shown in Figure 3.14 doesn’t apply to Microsoft Search in Bing.)
Figure 3.15 – Remember to test your policies using the What If tool. It's really handy!
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. The kit is available in several different languages and contains everything you’ll need to complete the actions listed below.

Action 1: Get the Adoption Kit:
https://resources.techcommunity.microsoft.com/microsoft-search-in-bing-adoption-kit/

Action 2: Send the “Microsoft Search in Bing introduction” template to users
[Estimated time = 30 minutes] The “Microsoft Search in Bing introduction” template provides a brief overview of Microsoft Search in Bing, how to sign-in, and sample queries to find people, internal company resources, and files. Feel free to customize it and then share with your users via email, SharePoint, Teams, Yammer, or other channels, to help them get started.

Action 3: Send new feature communications
[Estimated time = 30 minutes] We are releasing new Microsoft Search in Bing features on a regular basis. When new features are launched, you’ll receive a newsletter highlighting the feature benefits along with a version for end users, with instructions on how to use the new features. We encourage you to share these communications through your organization’s channels.

Action 4: Deliver a Microsoft Search in Bing end-user training session
[Estimated time = 60 minutes prep; 60 minutes to deliver] As part of the Microsoft Search in Bing service offering, you have access to our team of program managers who can deliver a one-hour virtual training for your employees. We’re also happy to train your trainers and provide the support materials to you. The training provides an overview of Microsoft Search in Bing, a demonstration of Microsoft Search in Bing in your tenant environment, and a hands-on-lab for users to learn, test, and provide feedback.

A variety of training materials are available.

1. In the Adoption Kit: User training template
2. From your Microsoft team contact: Microsoft Search Admin Training Guide
3. Online: How-to videos, tips, blog posts, demos, and more
**Action 5: Request feedback from your users**

Ask for feedback from your users and [share it with us](#). We want to know what they like and don’t like so we can deliver the best possible product. In the [Adoption Kit](#), you’ll find a survey template to send to your users to make it easy to request feedback.

**Admins:** We’d like your feedback, too. [Please complete this brief survey.](#) Thanks!

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**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 Locations 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.
Appendix: 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)
Actions Checklist

Following is a handy checklist to track your efforts at engaging your users.

- Download the Microsoft Search in Bing Adoption Kit for deployment guidance
- Publish default bookmarks
- Import SharePoint promoted results (Best Bets) and top queries
- Import top SharePoint queries using PowerShell
- 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
- Assign search admins and search editors
- Download Microsoft Search in Bing Chrome extension for SSO (single sign-on)
- Set Microsoft Search in Bing as default search engine
- Configure Conditional Access if needed
- Review the Communications section of the Adoption Kit
- Send the “Microsoft Search in Bing introduction” email to users
- Send new feature communications to stimulate adoption
- Schedule a Microsoft Search in Bing end-user training session
- Take the next steps and use your resources
- Request feedback from your users