Getting started with Microsoft Search

Admin Guide
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Introduction to Microsoft Search

What is Microsoft Search?
Welcome to Microsoft Search in Microsoft 365. Users are increasingly turning to search engines to accomplish tasks and make decisions—over half the internet population will start their internet experience with a search engine. Searching is the most popular online activity behind email.

Our world is rapidly transforming. The amount of data each of us must process is ever increasing. In fact, the total amount of content in the world is doubling every two years. People spend 20% of their time looking for information and 60% of the people claim to be missing key pieces of data to make decisions daily. All of us must manage an ever-increasing number of processes and systems often while on the go.

Microsoft Search increases your users’ productivity and saves them time finding information they need. Microsoft Search allows your users to search across all your enterprise content across Microsoft 365 and more through a consistent experience across all Microsoft entry points, so your users can search wherever they are working. Built on Microsoft Graph and Bing technology Microsoft Search delivers more relevant, personalized results—complete with enterprise-grade security.

Microsoft Search was introduced to address issues such as:

- Explosion of internet and intranet content—more content than ever is now available across the enterprise and online
- The enterprise search experience hasn’t changed in past 10 years—i.e. still serving lots of blue links but lacking tools to differentiate between them
- Search wasn’t really helping users accomplish tasks—just navigate through links

Microsoft Search offers your users the following:

- Better results
- Richer, more organized user experience
- Ability to accomplish key tasks
Discover content from across Microsoft 365.
Discover relevant content, as well as actions from colleagues across Microsoft 365 to find and get back to work faster.

Harness the collective knowledge of your organization.
Bring people together around common interests and areas of practice so they can exchange information, share best practices and build off each other’s work.

Build a rich, personal profile to work out loud across your organization.
Increasing the utility and functional value of search, which wasn’t really helping users accomplish tasks – just navigate through links.

The value of Microsoft Search to your organization
Getting started: Microsoft Search admin center

Microsoft Search lets your users use Bing to search your organization for SharePoint sites and files, internal websites, people, Office 365 groups, and more. Use the admin center to manage all aspects of Microsoft Search.

As a Microsoft Search admin for your organization, you can:

- Manage search service via a central console and monitor search usage and health via built-in analytics
- Take recommended actions to improve search experience, and manage security and privacy settings centrally
- Configure bookmarks, best bets, glossary, Q&As, and more
Security

The Microsoft Search admin center is organized around these areas:

Dashboard
Get a quick overview of bookmark and Q&A results, see top search queries, and how your results are performing.

Bookmarks
Create promoted results to help people find important tools and resources within the organization by placing them at the top of Bing results.

Q&As
Answer the most frequently asked questions in your organization.

Locations
Show map results and address information for buildings, offices, campuses, and other important places.

Users and permissions
administrators and editors, and provide or restrict access to Microsoft Search within your organization.

Content settings
Control the look and feel of Microsoft Search results on Bing.
Getting started: Microsoft Search Admin center

The Microsoft Search admin center includes tools and resources designed for admins, editors, and users, including:

**Content creator browser extension**
Available for admins and editors, use the Edge or Chrome extension to easily create bookmarks and Q&As simply by going to a site or page.

**Microsoft Search in Bing search extension**
Available for authorized users, use the Edge or Chrome extension to quickly access Microsoft Search enterprise search without leaving the page or site you’re on.

**Windows 10 and AAD sign-in extension for Chrome**
Available for authorized users, use the Chrome extension to easily authenticate with Azure Active Directory when signing in to supported sites, including Office 365 and Bing. We recommend deploying this extension when you test single sign-on.

**Import top SharePoint queries as bookmarks**
Available to admins, use this PowerShell script to import SharePoint top queries as draft bookmarks. Download the script and open the README file for information about requirements, examples, and available parameters.

**Import SharePoint Promoted Result Query Rules as bookmarks**
Available to admins, import SharePoint promoted results and top queries, or Best Bets, as suggested bookmarks.
Microsoft Search quick setup

Access the Microsoft Search admin center
1. Click Show all in the navigation menu of the Microsoft 365 admin center
2. Click on Settings > Microsoft Search

Create Bookmarks or Q&As
- Create and/or import Bookmarks, Q&As, and Locations
- Publish Bookmarks, Q&As, and Locations for your organization
- Assign Search admins and Search editors to assist with ongoing Bookmark and Q&A publishing tasks
- Install the Content Creator (Edge and Chrome) browser extension for Search admins and Search editors

Bulk-edit Bookmarks or Q&As
- Create and/or import Bookmarks, Q&As, and Locations
- Publish Bookmarks, Q&As, and Locations for your organization
- Assign Search admins and Search editors to assist with ongoing Bookmark and Q&A publishing tasks

Make it easy to access Microsoft Search in Bing
1. Set Bing as the default search engine for all users
2. Set up users for single sign-on
3. Install the Microsoft Search in Bing browser extension for all users of Edge and Chrome browsers
4. Add keywords to make important resources easy to find

NOTE: New Location bookmarks may take several hours to appear
Microsoft Search quick setup

Customize your Organizational profile
Content settings ensure a familiar look and feel for your work results.

1. In the navigation pane, click Settings > Organizational profile
2. Set technical contact, preferred language, release preferences, custom themes, and other company details. Save when done.

Import Promoted Result Query Rules from SharePoint
If your organization has Promoted Result Query Rules (formerly called Best Bets) set up in SharePoint, you can easily import them into Microsoft Search. The import tool currently supports sharepoint.com and sharepoint.com/search site collections.

1. In the Microsoft Search admin center pane, click Import
2. Select the Import SharePoint Promoted Result Query Rules as bookmarks option

NOTE: Microsoft Search currently requires a Targeted Release profile configuration
Driving adoption

1. Identify key stakeholders
To ensure a seamless rollout and increase user adoption of Microsoft Search, identify people who can help support and drive the process.

The table shows the team hierarchy and what each person contributes.

<table>
<thead>
<tr>
<th>Role</th>
<th>Department</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive sponsor</td>
<td>Executive leadership</td>
<td>Understand the high-level vision and value of Microsoft Search for your organization, Allocate resources, Provide leadership support to IT/business team, Communicate directly with the employees</td>
</tr>
<tr>
<td>Business owner</td>
<td>Any</td>
<td>Identify product and user scenarios, Determine success metrics for departments and the organization</td>
</tr>
<tr>
<td>Change management team</td>
<td>IT</td>
<td>Ensure product value is easy to understand, Create a plan for the rollout</td>
</tr>
<tr>
<td>Champions</td>
<td>Any (staff)</td>
<td>Evangelize the product to peers and teams</td>
</tr>
<tr>
<td>Search administrator</td>
<td>IT</td>
<td>Identify user adoption core team members, Drive discussions to show the value of Microsoft Search, Administer Microsoft Search, including look and feel of the experience and ongoing management</td>
</tr>
<tr>
<td>Editors</td>
<td>IT/Any</td>
<td>Create content in the Admin center</td>
</tr>
</tbody>
</table>
Driving adoption

2. Determine end-user scenarios
To ensure user adoption, it’s critical to determine and define end-user scenarios. These should include real-world examples of how people can use Microsoft Search to find the information they need, answer questions, and complete tasks faster. In order to measure the success of your roll out and user adoption, it’s also important to determine the metrics you’ll use before you begin.

Understand what your users need and want
When it comes to finding information and getting answers, knowing your users’ needs and pain points is key. You can use quantitative methods, like data from Office 365 and SharePoint search usage, or qualitative methods, like surveys and user focus groups to get this data. This will help you determine when, where, and how Microsoft Search can provide value.

For various roles and teams across your organization, consider:

- Existing user pain points when searching for information.
- Frequently used apps, tools, sites, and other information sources.
- What users would like to see when it comes to searching for information.
- How the benefits of Microsoft Search apply to your organization. For more information see Why Microsoft Search.

Choose the user scenarios that will have the biggest positive impact for your users.
Driving adoption

3. Prepare your organization
Investing time in preparing for your Microsoft Search rollout will result in a positive impact for your organization.

Product and content readiness
Administrators directly influence the search experience for end users and determine how Microsoft Search looks for the organization. This includes choosing the types of results you want to surface to your users. Control this by turning on or off results for documents, sites, people, groups, or conversations.

For more information, see Set up Microsoft Search.

Editors are subject matter experts who help manage bookmarks and Q&As within their areas of expertise. Editors should create content that addresses the user scenarios that you identified earlier.

For more information, see Plan your content.

Signing in
Microsoft Search users must sign in to Bing with a work or school account. To make signing in as seamless as possible for your users:

- Ensure Azure Active Directory configurations are correctly set, have a few users try to sign in. For more information, see Test single sign-on.
- Set browser defaults for company-managed devices to Bing. For more information, see Set default browser.
- Deploy search extensions for Edge and Chrome users via Group Policy. For more information, see the Extensions Group Policy.
Driving adoption

3. Prepare your organization (cont.)

Draft communications
Use your real-world scenarios to tell users about Microsoft Search and how it will help them save time. Your change management team can help create a rollout strategy and prepare collateral and campaigns for end-user readiness.

Begin planning communications and events for your organization:

- Banners, posters, or leaflets placed in prominent locations
- In-person product demos or booths
- Online events for local and remote teams
- Have your executive sponsor host a town hall meeting or send an announcement email
- Share self-help documentation about using Microsoft Search

All communications should educate users about how they can sign in to Bing to find work results.

Engage partner teams
As an integral part of Microsoft 365, Microsoft Search complies with GDPR and Tier-C guidelines. Depending on your organization, it may be necessary to share information about Microsoft Search with your privacy and security teams. For more information, see Security for Microsoft Search.

Make sure your help desk knows about the features and functionality of Microsoft Search, as well as the user requirements to sign in, so they can more effectively support users. For more information, see Using Microsoft Search.
Driving adoption

4. Run a pilot
Start with a small group of users to evaluate the impact of Microsoft Search and gather early feedback. This gives you time to change content, update your communications, and set expectations for the broad rollout. Search power users or early adopters are great candidates for this.

To help find pilot users:
- Partner with a business sponsor within your organization
- Identify a group of early adopters
- Identify groups that do high volumes of enterprise searches
- Identify users in other geographical locations, including international

Ask your pilot users to provide input using the feedback options in Microsoft Search or via simple surveys.

Survey questions to ask:
- Do you understand how to sign in and use Microsoft Search?
- Does it work as expected?
- Which features do you like?
- Were you able to find work results?
- Were the work results helpful?
- Are the communications about Microsoft Search clear and understandable?

This is a great time to begin measuring the effectiveness of the metrics identified in the “Determine end-user scenarios” section.

When you start the pilot phase, consider sharing a sneak peek of Microsoft Search with the wider organization.
Driving adoption

5. Roll out Microsoft Search

Every organization thinks about product rollouts differently. Here are a few things to consider.

Broad deployment
When you are ready, either allow all users in your organization access to Microsoft Search, or use a phased approach to roll out more slowly.

Generate awareness
Build excitement in your organization about Microsoft Search:

- Enlist pilot users to provide peer-to-peer assistance and expertise.
- Follow through on the communications and events you planned above.

Ongoing communication
For the first few weeks and months, maintain a rhythm of communications to encourage engagement with Microsoft Search. This keeps users informed and engages new users. Each communication should explain why Microsoft Search can be helpful to their work.

Several customizable pre-written templates (in Word and email formats) are available in the Microsoft Search in Bing Adoption Kit.

Send ongoing communications that highlight features and searches to try, as well as user success stories.

Gather feedback and improve
Support users and let them know you care by listening to them and acting on their feedback.

Use the insights dashboard to see how the product and the content is performing. Leverage this information to update bookmarks, Q&As, and other communications. This will also help you:

- Improve the content quality: Review titles, descriptions, and URLs; optimize keywords; remove obsolete information; and add new information
- Determine which features are most frequently—or infrequently—used
- Conduct surveys, focus groups, and feedback sessions to understand what users think of Microsoft Search, increase adoption, and identify improvement areas

Educating and gathering feedback are iterative processes. It may be necessary to make changes to content and communications as your users adopt Microsoft Search.
Security

With enterprise-grade security, Microsoft Search always keeps your users and data protected.

Secure by default
Microsoft Search always ensures requests are made over HTTPS. This safeguard ensures the connection is encrypted end-to-end for enhanced security.

Authentication and authorization with Azure Active Directory
Authentication for Microsoft Search is tied to Azure Active Directory. When Microsoft Search users go to Bing, the Bing header will show sign-in options for a Microsoft account as well as a work or school account. If Bing can’t determine whether a user is an eligible participant, users can go to the Explore Microsoft Search page, where they’ll be automatically redirected to your organization’s sign-in page.

Users can access Microsoft Search only through a work or school account. They need to sign in with the same credentials they use to access Office 365 services such as SharePoint or Outlook. A personal Microsoft account can’t be used to sign in to Microsoft Search.

Users can’t be signed in to Bing with both a Microsoft account and a work or school account at the same time.

Single sign-on
If a user is already authenticated with their work or school account in another service, such as Outlook or SharePoint, they’ll be automatically signed in to Microsoft Search when they go to Bing in the same browser. Also, when the user signs out of Microsoft Search, they’ll be automatically signed out from other services in the same browser.

Communicates with the Trusted Cloud from the browser
When a user signs in with their work or school account, Bing will download the necessary client libraries to the browser to enable Microsoft Search results. Then, when they search, the in-browser code calls the Office 365 cloud to get work results. To do this, Microsoft Search uses a dedicated API that is Tier C (SOC2 Type 1) compliant pursuant to the Office 365 Compliance Framework for Industry Standards and Regulations (PDF download). This means work results and work data never flow through non-compliant Bing systems.

Permissions
Work results retrieved from Office 365 workloads such as SharePoint and OneDrive for Business are security trimmed at the source. Users can’t see resources such as Word documents or PowerPoint presentations they can’t see and access through Office 365. They can only see their own files and files that have been shared with them by the author explicitly or implicitly (through a group membership, for example) in SharePoint.

Protects user queries from the public portion of Bing
Because work-related searches may be sensitive, Microsoft Search has implemented a set of trust measures for how these are handled by the public web results part of Bing. Regardless of whether a user query contains one or more work results in the returned response, the following measures are taken:

- **Logging**
  - All search logs pertaining to Microsoft Search traffic are de-identified and stored separately from public, non-Microsoft Search traffic. They’re retained for 18 months, and access is restricted for debugging purposes only.

- The queries in these logs are not used to model or train public features such as autosuggest or related searches for the public web.
- Restricted access is managed via various secure mechanisms, including security groups and other layers within the engineering system.

- **Search history**
  - When signed in with a work or school account, a user’s search history won’t be available on other computers or devices.

- **Advertising**
  - Enterprise search queries are never shared with or suggested to advertisers.
  - Search Ads logs pertaining to Microsoft Search are stored separately from public traffic.
  - Ads are never targeted to a user based on their work identity or organization.

GDPR
The May 21, 2018, blog post from Microsoft reflects our commitment to GDPR compliance and how Microsoft helps businesses and organizations with their own GDPR compliance obligations. You can find additional detail in the Microsoft Trust Center FAQ. Microsoft Search queries that operate against organizational customers’ Customer Data within the Online Services will also meet the processor commitments outlined in Article 28 as reflected in the Trust Center FAQ. With respect to queries from Microsoft Search that go to public Bing, Microsoft is a data controller and has implemented measures to de-identify the queries as outlined under GDPR.
Insights dashboard

Get data insights and see how users are engaging with your results. Use the Admin center Dashboard to:

- See how many bookmarks and Q&As have been published, scheduled, or suggested
- See impressions for top search queries that show work results
- Analyze impression distributions for bookmarks and Q&As

Get details about bookmarks and Q&As
Use the Dashboard to see bookmark or Q&A totals by status:

- Published: The number of published results that are available to users
- Scheduled: The number of scheduled results in the publish pipeline
- Suggested: The number of suggestions from users

Bookmarks and Q&A insight cards in the Dashboard also provide easy access to common tasks:

- To view bookmark or Q&A results, click Bookmarks or Q&As on the card title
- To add a bookmark or Q&A, click the create option
- To bulk add bookmarks or Q&As, click the import option

Review top search queries
Find out which searches have generated the most impressions over the last 90 days. The top 25 user searches for each result type are shown along with the total number of impressions and their click-through rate (CTR). On the top search queries card, you can:

Filter by result type, click All results on the menu and select a different result type

See how a result appears on Bing, click a query and the search results page opens in a new tab

See additional search queries, click the left or right arrows on the bottom of the card

Analyze impressions by result type
Easy-to-read graphs in the Impression distribution by result type card show data over various time frames. The summary shows the number of impressions with a percentage calculation for the distribution (number of result type impressions x 100 / total number of impressions). The timeline shows the daily number of impressions for a result type. You can also change the time range for both views and get more details:

- On the top of the card, click 7 days, 30 days, or 90 days
- To see a custom range between 0 and 90 days, click Custom range and enter the start and end dates
- In the timeline, hover on a data point for impressions by result type for a single day
Admin FAQ

Q: What are the minimum requirements to enable Microsoft Search?
A: For information about requirements, see Requirements for Microsoft Search.

Q: What file types and sources does Microsoft Search support?
A: Microsoft Search supports the following content sources:
- SharePoint Online
- Hybrid SharePoint (on-premises + SharePoint Online)
- OneDrive for Business

The following file types are surfaced in file search and appear on the Files tab for People and Groups:
- Word
- Excel
- PowerPoint
- OneNote
- PDF

Q: Does Microsoft Search look for files on-premises as well as the cloud?
A: Microsoft Search supports searching for documents that live on SharePoint Online, OneDrive for Business, as well as over hybrid on-premises SharePoint and SharePoint Online for the most common Office file types. If you can search on-premises content in SharePoint Online, you should be able to find on-premises content using Microsoft Search.

Q: Does Microsoft Search support advanced query understanding?
A: Yes, Microsoft Search parses query intent from larger phrases. This feature uses AI to learn common superfluous phrases users add to their queries that don’t impact their search intent. For example, when a user searches for ‘tell me more about how to change my password please’ we extract the less important words from the query and trigger based on the relevant ones like ‘change password.’

This feature will not override keywords set in the admin center.

Q: Does Microsoft Search respect existing file permissions?
A: Microsoft Search respects security trimming from the source. Users can only see information they have access to.

Q: How does Microsoft Search use Azure Active Directory?
A: Microsoft Search uses Azure Active Directory to authenticate and authorize access to your company’s data. Microsoft Search conforms to the identity handling practices standard across all Microsoft products. This means your users may be automatically signed in through single sign-on.

Q: What are the content sources for the people card?
A: The people card derives information from Azure Active Directory, Exchange Online, and SharePoint Online.

Q: Does Microsoft Search provide search results across tenants?
A: No, cross tenant or shared tenant access is not supported.

Find more Microsoft Search documentation at https://docs.microsoft.com/en-us/microsoftsearch/
A smarter search experience

Microsoft Search is the intelligent, modern approach to search. Enable your users to quickly find the people, places, and files they need.

For additional guidance and resources, please visit: https://go.microsoft.com/fwlink/?linkid=2079623