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Module Overview

Overview

This training module introduces you to the tasks you will perform as Global Administrators, Search Administrators, and/or Search Editors in the Microsoft Search in Bing environment. We’ll start with some basic administrative tasks in the first two lessons and then move onto more advanced topics, including a look at the Search Administrator and Search Editor roles in Lessons 4 and 5.

Up to this point, you may have viewed Microsoft Search in Bing from a user perspective. This module takes you beyond the basics and into tasks only available to administrators. As you learn about these the tasks, think about how they fit into the enterprise workflow you learned about if you participated in the end user–focused modules in this series.

Goals

After finishing this module, you will be able to:

- Complete key tasks associated with your role
- Navigate the Microsoft 365 admin center and Azure Active Directory admin portal
- Use filters to locate tools and services relevant to your job role
- Get help and guidance for unfamiliar topics

Target audience

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

Time required to complete this module: 60–90 minutes to complete (depending on the role—Global Administrators require more time than Search Administrators and Search Editors)
Lesson 1: Getting started

Overview (recommended)
Learn about the steps and concepts required to integrate Microsoft Search in Bing with Azure AD.

Objectives
After you complete this lesson you will be able to:

- Access the Azure admin portal
- Sign in as an admin
- Navigate to the Microsoft Search in Bing Getting started section

Time to complete
This lesson takes about 5 minutes

1. Open http://manage.windowsazure.com and sign in with your admin account user name (e.g., admin@contosodemosi.onmicrosoft.com) and password (e.g., Bof13309)

2. Select Azure Active Directory from the menu on the left, then Enterprise applications

Figure 1.1 – Select Azure Active Directory, then Enterprise Applications
3. From the **Application Type** menu, choose **All Applications**

![Application Type Menu]

Figure 1.2 – Select All applications from the drop-down menu

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

![Search Input]

Figure 1.3 – Be sure to select ‘All Applications’—otherwise Microsoft Search won’t appear.

5. Click **Getting started**. You’ll see the topics we’ll be covering in the first four lessons.

![Getting Started Panel]

Figure 1.4 – The Microsoft Search in Bing – Getting started panel is not located in the Microsoft 365 admin center, which we’ll be exploring in future lessons. That’s why we’re starting in the Azure Active Directory admin center.

6. Click **Overview**. Take a moment to review this recommended reading material.
Figure 1.5 – This is more of an overview of single sign-on and Azure AD than Microsoft Search in Bing.

It’s worth noting that Microsoft Search in Bing is enabled by default (those in the early access preview program may have configured it differently; this is explained in Lesson 4), and thus basic operation requires none of the steps described in this overview other than signing in. However, as an admin, it’s good to have a clear understanding of exactly how everything works.

In general, you will administer Microsoft Search in Bing users and features via the Microsoft 365 admin center (detailed in Lesson 4), which you may find more convenient than the more complex controls available in the Azure admin portal. There are, however, a few advanced features (such as Conditional Access, which we’ll cover in Lesson 3) that require configuration via the Azure Active Directory section of the Azure admin portal.

Let’s move on with step 2 of Getting Started.
Lesson 2: Assign a user for testing

Lesson overview

In this lesson, we’ll set up a user account for testing various functions, including an important one we’ll learn about in Lesson 3.

Objectives

After you complete this lesson you will be able to:

• Practice navigating the Azure admin center
• Assign a user for testing
• Sign out of one account and sign in as another

Time to complete

This lesson includes a brief review of what we learned in the previous lesson and takes about 5 minutes.

1. Sign out and close your browser.
2. From https://manage.windowsazure.com, navigate to Azure Active Directory
3. Select Enterprise Applications > All Applications >
4. Type “microsoft search” into the search box
5. Select the Microsoft Search result. (Don’t see it? check that search results for all applications are shown.)
6. Select Getting Started
7. From the Getting started screen, choose Assign a user for testing (required)

Assign a user for testing (required)

Choose a single user account under your control to test single sign-on to Microsoft Search in Bing.

8. Choose Users and groups, then Add user. In the Add Assignment box, click Users and groups.
9. In the Users and groups panel, locate an account you can assign as a test user. This should not be your main administrative account. (Any non-admin user account with an applicable Office 365 subscription can be used.) Select it and click Select.

10. Click Assign to assign the selected user for testing.
11. If you see a message like this, you’ve succeeded. Congratulations!

![Figure 2.4 – Application assignment succeeded.](image)

12. Once assigned, the user will show up in your Overview panel.

![Figure 2.5 – Shown here: the Microsoft Search in Bing Overview panel in Azure admin center.](image)

We’re now ready to move on to Lesson 3.
Lesson 3: Set up Conditional Access

Lesson overview

Set up Conditional Access (optional)

Configure when and how users are prompted for multi-factor authentication.

Despite the description above, you can configure Conditional Access for options other than multi-factor authentication. In this lesson, we will use Conditional Access to roll out Microsoft Search in Bing to a limited set of users. 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, 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
- Learn how a policy can include and exclude certain users
- Test configurations with the ‘What If’ tool

Time to complete

This lesson, including a brief review of signing in and out of accounts, takes about 15 minutes

Action 1: Verify access

In the last lesson, we assigned a test user. Now we need to verify that the test account can access Microsoft Search in Bing.
1. Open your browser and sign in to bing.com using the “Work or school account” option.

![Figure 3.1 – Sign in with the 'Work or school account' option](image)

Sign in with an available user name: (e.g., testuser@M365x408182.onmicrosoft.com) and password: (e.g., MSBDemoTenant!)

**Tip:** On your system, you should create your own test account and use it instead.

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:

![Figure 3.2 – Ensure that your test user can access Microsoft Search in Bing](image)

Success! We now know our test account can access Microsoft Search in Bing. Now let’s exclude this account via Conditional Access.

**Action 2: Enable Conditional Access**

1. Start by signing into the AAD admin center as an admin, via the [Microsoft Search in Bing - Getting Started](#) page. From the Security menu, choose [Conditional Access](#).
13

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.

Figure 3.4 – To add Conditional Access to your Favorites, select All Services (1), search for Conditional (2), and click the star (3).

2. Click New policy and give it a name.

Let’s include our test user.

a. Click Assignments > Users and groups.

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

c. Select ‘test user’.

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

e. Click Done when both selections have been made.
Figure 3.5 – On the Include tab, add Test user. On the Exclude tab, add your admin user account. Then name your new policy.

In the screenshot on the right, we’ve chosen to exclude the administrative account from this test policy—we don’t want to lock ourselves out! 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.”

Figure 3.6 – The system will warn you if you try to exclude administrative roles—but be careful!
4. We’re almost there! Now that we’ve selected the users who will and won’t be affected, and the app this policy applies to, we just have to tell the policy what to do when it’s in effect. In this case, we want it to block. So, select **Block** from **Access controls > Grant**, then click **Select**.

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

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

**Action 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. As the policy we created is designed to block access for “test user,” we start by selecting that user. Then, just click “What If” to see what policies, if any, will affect this user.

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

![Figure 3.9 – It works!](image)

After your test is complete, you should sign out of the test user account and sign in as an admin again. (Review: How to sign in or out?)

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

And when we look in the Failure event:

**ERROR**

**Access has been blocked due to conditional access policies.**

Figure 3.12 – The Failure event details screen includes error codes, failure reasons, and other details.
**Action 4: 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?

Answer: The Access controls > Grant should set “Grant” to “Block Access” as shown below. (The Access controls > Session setting here doesn’t apply to Microsoft Search in Bing.)
Lesson 4: Deploy single sign-on

Lesson overview

**Deploy single sign-on to users and groups (recommended)**

Once you’ve configured Microsoft Search in Bing and Azure AD to your liking, deploy to the rest of your organization.

This lesson introduces the tools that affect either all users or an individual user. You will create a test user, review the license requirements for Microsoft Search in Bing, and learn about some of the special administrative roles related to Microsoft Search.

Objectives

After you complete this lesson you will be able to:

- Locate an existing user
- Review and edit permissions for a user
- Create a new user

Time to complete

This lesson takes about 15 minutes

**Important:** If your employees use Chrome on Windows 10, single sign-on will not work unless you have the extension below.

Get the Chrome extension here.

Use this extension to sign in to Bing.com and other supported websites with accounts on Windows 10. If you have a Microsoft supported identity on Windows 10, you won’t be required to enter your credentials to sign in to supported websites. You’ll need to use this extension if your organization has implemented conditional access policy. Currently, this extension supports Azure Active Directory identities.

View the settings in the Microsoft 365 admin center

The various tools and configuration settings we’ve explored so far in the Azure Active Directory admin center aren’t the only place where settings pertaining to Microsoft Search can be managed. In fact, the Microsoft 365 admin center is where you’ll probably end up spending most of your time in the admin while administering Microsoft Search–related feature. Let’s look at it now. As always, to view administrative tools and settings, you must be signed in as an admin.
We ended the last lesson by signing out of the test account and signing in again as an admin. The steps below assume an admin account.

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

![Figure 4.1 – Open the admin center. Edge is shown here, but almost any browser will work.](image)

2) You should see a screen that looks something like this:

![Figure 4.3 – Microsoft 365 admin center contains the tools you’ll use most often](image)

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

**Tip:** If you don’t see Microsoft Search, see the New admin center section later in this lesson.
4) You should see the Microsoft Search dashboard, as shown below.

![Image of Microsoft Search dashboard]

*Figure 4.4 – The dashboard provides metrics for various categories and much more*

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

![Image of Microsoft 365 admin center]

*Figure 4.5 – Microsoft 365 admin center. Your screen may look different, depending on the setup steps you’ve completed.*
Reminder: For the remainder of this course module, you will use this admin account and password instead of your usual corporate account to sign in to the Edge browser. You can continue to sign in to your computer with your corporate credentials—you won’t lose access to any corporate resources you usually rely upon. And if, for some reason, you do need to log into the browser with a different account during this module, follow the steps above to return to the admin account before continuing with the lessons.

Overview of the Microsoft 365 admin center menu options

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

- Home
- Users – Add a user, Add multiple users
- Groups – Office 365 groups, Distribution lists, security groups. (Learn about group types)
- Resources
- Billing
- Support
  - Settings – Microsoft Search, Services & add-ins, Security & privacy, etc.
- Setup
- Reports
- Health

Admin centers

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

The new admin center

IMPORTANT: When you log in, depending on your configuration, you might see an option to “Try the new admin center.” You must have the new admin center turned on in order to access the Microsoft Search admin center, which we’ll be exploring in more depth in the lessons to follow.
If the preview is turned off, you will be unable to see the Microsoft Search-specific settings described in these lessons. Be sure that the new admin center is enabled if you can’t find the Microsoft Search settings.

![Image of the new admin center try the preview](image)

*Figure 4.6 – Be sure to enable the new admin center.*

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

**Note:** Early Access “Lighthouse” program customers may also need to set their organizational profile to “Targeted release”—this is detailed in the Customization section of [Lesson 7](#).

### Which products include Microsoft Search?

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

### Assigning and editing permissions

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

The Microsoft 365 admin center provides several predefined specialist roles, including two dedicated to search administration: **Search Admin** and **Search Editor**. Let’s look at what each of these roles entails.
Administrative tasks & roles

Access to administrative tools is determined by your role. The table below provides an overview of each of the administrative roles and the tasks that are available to them. Roles are assigned as shown.

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

Table 1 – Tasks, roles, and permissions

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

Search Admin:

- **Full access** to Microsoft Search settings: publish, edit, save, schedule, import/export bookmarks, Q&A, and locations; New guest user

- **Limited access** to user management: Export users, search, filter users (no ‘Assign Roles’, ‘Add’ or ‘Delete’); customize navigation. Can view Microsoft Search in Bing Getting started section.

- **Cannot access** Edit Organizational profile, Conditional Access, add/edit/remove users, group management (Only Global Admins or admins who also have the user management role can manage Office 365 Groups); sign-ins; edit licenses, many other AAD settings.
**Search Editor:** Can create and manage editorial content such as bookmarks, Q&As, and locations. (Currently the same as Search Admin.)

Thus:

- Search Admin/Editor cannot assign another user as an Admin
- Search Admin/Editor cannot assign another user as Search Editor
- Search Admin/Editor can create, edit, delete, and publish bookmarks, Q&As and locations

**ACTIVITY:** Look up the current permissions for users AlexW and AllanD. (To complete this activity, you should be signed in with the admin@M365x408182.onmicrosoft.com demonstration account.)

1. In the admin center’s left-side panel, select Users
2. Select Active users from the submenu that appears.
3. On the Active users screen, locate the user with the username AlexW@M365x408182.OnMicrosoft.com

Optionally, you may wish to search for a non-admin user within your own organization while signed in as an admin user.

*Figure 4.7 – Look up permissions*
Figure 4.8 – Active users, showing display names, usernames, and licenses

4. Click on this user to display information about the user’s account details.

Figure 4.9 – Manage Roles
5. Locate the Roles heading. Notice that this user has “No administrator access.”

6. Ready to move on? Let’s compare the permissions on the second account, alland@M365x408182.onmicrosoft.com. Locate Allan’s name in the (alphabetical) list of Display names. You’ll find him listed as Allan Deyoung.

*You may wish to search for a Search Admin’s username within your own organization*

7. Clicking on the name will display the account info. Notice this time the Roles section says something different: Search administrator. In the next lesson, we’ll learn how to use the Manage roles feature to assign this role or other special permissions. Go ahead and close the panel with the “X” control in the upper right.

8. Now, let’s look at a different set of permissions: your own. Locate the corresponding Display name and click on that account.

*(Hint: The initials are displayed in the upper-right corner of the admin center window.)*

If you are having difficulty finding it, there’s a search function just above the three-column list. Try a search for “admin” to locate it.

*[Facilitator: Help anyone who needs further assistance and verify that everyone has completed this step successfully before continuing.]*
When you’ve located the corresponding account (i.e., the one you are using), click on it and review the Roles section. This time, you’ll notice that this user is listed as “Global administrator.”

Now, click the blue “Manage roles” link. This opens the Manage admin roles panel.

The **Manage admin roles** panel is where—you guessed it—you can manage admin roles. You’ll see a message that you can’t edit your own security settings. But you *can* edit someone else’s. We’ll do that in the next lesson.

![Manage admin roles](image)

*Figure 4.11 – You can’t edit your own account’s security settings*

Exit this panel—either by clicking the ← arrow or the “X” close box—and then close the parent panel by clicking its “X” close box to return to the User list.

**In review**

In this lesson, we learned how to:

- Sign in to the Microsoft 365 admin center as an admin user
- Locate users in the User list
- Review users with three different types of permissions: User, Search Admin, Global Admin.

What else did we learn?

[Possible answers include]

- How to search for names in the User list
- How to find the manage roles link
- Admins can’t edit their own permissions
- It’s recommended to have at least two Global Admins in an organization

We also learned how specific types of permissions are required to access certain tools or complete various tasks.
Questions?

[End of Lesson 4]

Quiz

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

<Customize this quiz for your own organization>

Answers:

(1) No access; (2) No; (3) No; (4) Publish bookmarks/Q&As/Locations, Edit bookmarks/Q&As/Locations, View the admin center/Microsoft Search dashboard
Lesson 5: Add a user and set permissions

Lesson overview

In this lesson, we will add a new user, edit his or her permissions and assign a predefined role. We’ll also take a closer look at exactly what each of these predefined roles can and cannot do.

Objectives

After you complete this lesson you will be able to:

- Add a new user
- Make a user active
- Delete a user

Time to complete

This lesson takes about 15 minutes

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

1) Ensure that you are still signed in as an admin

2) Go to https://admin.microsoft.com/

![Figure 5.1 – Click ‘Add user’](image)
3) As you will be able to guess from a glance at the “Essentials” area of the screen, User management is an extremely common task. Click **Add user**. This will take you to a “Set up the basics” screen.

4) Fill out at least the items marked with asterisks. Click **Next** when you’re ready to continue.

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

![Set up the basics](image)

*Figure 5.2 – Set up the basics*
After you’ve named the test user account, assign an appropriate product license to test Microsoft Search in Bing. Here, we’re using an Office 365 E5 license.

Figure 5.3 – Choose a license type that has access to Microsoft Search in Bing

Click Next to continue to the Optional settings screen.

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

Figure 5.4 – The default for new user accounts is ‘no administrative access’

1. The Roles section in Figure 5.4 tells us that this user currently has no administration access. That’s okay—we’ll review and edit this user’s role settings in a few minutes. Click Next to skip over the Optional settings for now.

2. Click Finish Adding to complete the task of adding a user.

Figure 5.5 – Close the box when the task of adding a user is complete
3. When you’re done, you’ll see the user details you specified. Our new user is starting off as a regular Office 365 E5 licensee without any special privileges. We’ll change those right after the next step.

4. Click **Close** to continue.

**Edit permissions**

*We could* have given our test user special permissions by selecting a role other than “User” on the Optional Settings screen seen in step 2 of our last example. But it’s much more common to assign new permissions to an existing user, so that’s what we’re doing here.

To edit permissions:

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

   ![User management panel]
   
   *Figure 5.6 – Edit user*

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

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

![Edit user roles](image1)

*Figure 5.9 – There are two Search-specific roles in this list: Search administrator and Search editor*

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

![Search editor](image2)

*Figure 5.10 – Be sure to save changes.*

![Edit user roles](image3)

*Figure 5.12 – Close the Edit user roles box when done*

Next, we’ll explore what this role is capable of.
What a Search Editor can and cannot do

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

Try any of the following procedures:

• Access the admin center [https://admin.microsoft.com/](https://admin.microsoft.com/) (remember to set preview “on”)
• Export users (Users > Active users > Export Users)
• Create/Edit/Publish/Revert/Delete a bookmark
• Review status messages in Health > Message center

Now try any of these:

• Change the role for any user
• Edit licenses (click user name, then select Licenses and Apps)
• Create a Global Admin
• Create or edit any other admin roles
• Reset passwords for billing, global, and service admins.

<Customize these tasks for your own organization>

If you were not able to figure out how to complete some of these procedures, don’t worry—we’ll look at these tasks in more depth in upcoming lessons. For now, the takeaway is: the first group consists of tasks a Search Editor can do, and the second group are tasks a Search Editor cannot do.

And trust us on this one: *test user* can reset *test user’s* own password, but please don’t do this.
Currently, the Search Administrator role has exactly the same capabilities and limitations as the Search Editor role. This may change in future releases.

![Image of password change form]

*Figure 5.18 – See? Here’s proof*

In short, both of these roles are able to manage Microsoft Search-related settings and tasks in the Microsoft 365 admin center. In the next lesson, we’ll look at some of the most important ones.
Lesson 6: Add bookmarks, Q&As, and locations

Lesson overview

Bookmarks help you publish and promote the best possible results for business-related queries. The more bookmarks you have published, the more value and benefit added for users. In the following sections, you can find several ways to create relevant published bookmarks.

Objective

- Create and manage bookmarks, Q&As, and locations
- Understand the administrative tasks associated with each of these categories

Time to complete

This lesson takes about 20 minutes

Action 1: Publish default bookmarks

[Estimated time = 10 minutes]

![Image of Microsoft Search panel]

Figure 6.1 – Suggested, scheduled, draft, and published bookmarks appear in the Microsoft Search panel of the M365 admin center. These can then be reviewed, edited, scheduled, and published by a Search Admin or Search Editor.

Default suggested bookmarks align with many of the most common searches in organizations and can be easily modified. We've preloaded some keywords and the title so all you need to do is add
the URL to point to the relevant intranet site within your organization. As an example, for the default bookmark “HR,” add the URL for your HR department’s intranet site and then publish.

To publish:

2. Select Show all > Settings > Microsoft Search
3. Scroll down to locate the list of Draft and Suggested Bookmarks
4. Select a Draft or Suggested bookmark
5. Review the bookmark details and edit as needed. When done, select Publish

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

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

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

Import SharePoint promoted results (Best Bets) and top queries

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

Action 1: Import SharePoint promoted result query rules

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

If you use SharePoint promoted result query rules (formerly known as Best Bets), you can import the list from your sharepoint.com/ and sharepoint.com/search default site collection as bookmarks into your Microsoft Search admin portal.
2. Select Settings > Microsoft Search
3. Select Import
4. From the Import panel, select SharePoint

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

The imported bookmarks appear in the Suggested tab on the Bookmarks page, so you can easily publish to your Microsoft Search users. Publishing time varies depending on how many bookmarks you have.
Bulk create and import bookmarks

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

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

Action 1: Import bookmarks via a CSV file

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

If you have an existing collection of bookmarks, you can easily import them as a list of comma-separated values (CSV). With the CSV import option, you will import the list as draft bookmarks into the collection of Microsoft Search bookmarks visible from the Microsoft Search dashboard in the Microsoft 365 admin center.

2. Select Settings > Microsoft Search
3. Select Import
4. From the Import panel, select CSV
5. Download the bookmarks template, fill it with your bookmarks collection (not all fields in the template are required), and save.
6. Upload the completed template
7. Publish draft bookmarks
**Tip:** Download the bookmarks template to ensure that your imported bookmarks will be in the correct format. You can upload the completed template directly from this panel.

The imported bookmarks appear in the **Draft** tab on the Bookmarks page, so you can easily publish to your Microsoft Search users. Imports are quick; publishing time varies depending on how many bookmarks you have.

**Action 2: 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 1.
6. **Publish** draft bookmarks.

For more details, see the [Microsoft Search bookmarks support page](https://support.microsoft.com).
Action 3: Import top SharePoint queries using PowerShell

[Estimated time = 10 minutes to run the script; publishing time varies]

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

The PowerShell script does the following:

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

**Download the script** [here].

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

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

![Image](image1.png)

*Figure 6.6 – Right-click the script to run*

4. You will be prompted for user name and password.
5. At the AdminEmailAddress prompt, type or paste your admin user name and press Enter.
6. At the Password prompt, type or paste your password.

![Image](image2.png)

*Figure 6.7 – Enter your admin username and password*

7. Press Enter. As the PowerShell script begins to run, you should see text that looks like this:
8. The script will begin to run. You may see a light blue bar near the top of the PowerShell window saying that it is loading dependencies, and so on.

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

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

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

Navigate to the directory your script is in (for example, if the script is on your desktop, type `cd Desktop`), then add the parameters on the PowerShell command line as you like. `-Verbose` and `-Debug` are both handy when troubleshooting a script. See the Read Me file for more information about optional parameters.

1. A sample of SafeMode output is shown here:

https://m365x408182-admin.sharepoint.com/_layouts/15/reporting.aspx?Category=AnalyticsSearch

**Create additional high-value bookmarks**

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

**Action 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 great candidates for bookmarks.
Figure 6.9 – 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: Brainstorm other useful topics**

[Estimated time = 10 minutes]

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

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

**Action 3: Install Content Creator**

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

Search Editors and Search Admins should install a handy browser extension called Microsoft Search Content Creator. Available for Edge and Chrome browsers, this extension allows a Search Admin/Editor to create, edit, and publish bookmarks and Q&A content. When installed, you will see its icon in the upper-right corner of your browser’s toolbar.
Figure 6.10 – Search Admins and Search Editors should install the Content Creator extension

If not already installed, get the extension here:
aka.ms/ContentCreator-Edge
aka.ms/ContentCreator-Chrome

Go ahead and install it now.

**Action 4: Add a bookmark**

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

2. Sign in using an account with Search Editor/Admin rights.
   User name: AllanD@M365x408182.onmicrosoft.com
   Password: MSBDemoTenant!
   <Customize this for your own organization>

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

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

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

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

7. In the example shown in Figure 6.13, we’ve published a bookmark with the reserved keywords “Microsoft Search docs.” This ensures that this bookmarked result will *always* appear when a signed-in user searches for Microsoft Search docs. Don’t overuse reserved keywords. Reserved keywords can only be used once.
Action 5: Review, edit, and publish bookmarks suggested by others

Figure 6.13 – You can only use reserved keywords once

Figure 6.14 – Any user of Microsoft Search in Bing can suggest a link

Figure 6.15 – A user clicks Feedback, then selects I want to suggest a link. Submissions appear in the M365 admin center as suggested bookmarks
Figure 6.1 – Suggested, scheduled, draft, and published bookmarks appear in the Microsoft Search admin center. These can then be reviewed, edited, scheduled, and published by a Search Admin or Search Editor.

Add Enterprise Q&A

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

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

[Estimated time = 20 minutes]

Knowing the top helpdesk, HR, and company policy queries generated by the people in your organization can help you establish the most effective Q&A topics. Review the helpdesk logs or pull directly from your organization’s internal FAQ or Q&As to identify the most commonly asked questions for users to search.
Action 2: Create your Q&A

[Estimated time: Varies, depending on number of Q&As]

Access the admin center and enter your organization’s Q&A, including keywords and Q&A settings.

Add or edit a single Q&A

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

Try to put yourself in the user’s mindset by imaging the keywords they will use while searching for the Q&A content you’ve prepared. As with bookmarks, you can ensure that your users always find a specific query result by using a reserved keyword.
Action 3: Use Content Creator to edit and publish Q&As

[Estimated time: basics = 20 minutes; total time depends on number of bookmarks/Q&As created]

Again, we’ll begin by selecting the Microsoft Search Content Creator icon from your browser’s address bar. This time, we’ll select the Add Q&A tab. As before, this extension will enable us to directly publish Q&As or save them as drafts to review within the admin center before publishing.
Figure 6.21 – Sometimes the first answer retrieved is not the best one. In this case, 10 results were returned. Here we are choosing Q&A answer #2 of 10. If you don’t see good answer candidates, try rephrasing your question.

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

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

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

- **Specify an expiration date** for a bookmarked map to the company 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.

Section summary

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

(Refer back to lesson 5 if you are unsure how to set up Search Admin and Search Editor roles in the admin center.)

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

For more information on creating effective titles, descriptions, keywords, and more, see the Planning your content section of the Microsoft Search documentation.
Lesson 7: Locations and customization options

Lesson overview
In this lesson, we will learn how to access and navigate the Microsoft Search documentation library. We will use the guidance in this documentation to explore the locations feature. We’ll also look at some of the customization options available to the admin user.

Objectives
After you complete this lesson you will be able to:

- Access and navigate the online documentation for Microsoft Search
- Create and manage information that helps users find addresses and locate buildings
- Customize Microsoft Search in Bing for your organization

Time to complete
This lesson takes about 15 minutes

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

Action 1: Locate the locations documentation in the Microsoft Search docs
1. In Bing, search for “microsoft search docs” (capitalization is unimportant)
2. Select Make content easy to find
3. Select Manage locations
4. Follow the instructions under Add or edit a single location
Figure 7.1 – The ‘Make content easy to find’ section has sections on bookmarks, Q&A and locations

5. Administrators should add all important locations of your organization.

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

**Import/export**

Be sure to review the documentation for important information on how to prevent errors when working with the template file.
Coming soon: Floorplans

In addition to street maps, it will soon be possible to devise locations maps of business office floorplans. This upcoming feature will allow Microsoft Search in Bing users to find the location of colleagues, conference rooms, cafeterias, etc. All the user needs to do is search for something like “John Smith's location,” “conference room 7052,” or “building 3 cafeteria,” and Bing will show where it is located on a map.

As is the case with street maps (based on Bing Maps), the floorplan maps are produced as vector files, allowing users to zoom in without seeing jagged pixel-edges.

Figure 7.3 – Office floorplan search

Figure 7.4 – Floorplans are uploaded, then linked to office locations
To begin implementing this feature, you’ll need:

- floorplan maps in DWG or DXF (Visio can import and export these formats)
- The office location defined in AAD, as shown here:

![Figure 7.5 – The office location data is defined in AAD](image)

There is some flexibility in the ways you can format your office locations. You might, for example, use any of the following common formats:

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

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

When implemented, the Locations > Floorplans feature returns results for searches by name or office number. A floor plan or diagram showing the arrangement of rooms for a floor also appears, with a pin placed on the location you searched for:
There are several commercially available tools that can help you create interactive floorplans, including Microsoft’s own Visio. Some helpful hints for using Visio in this capacity are provided below.

Generally, the admin’s role will be to manage floorplan layouts, staff details, project security, and asset tracking. The admin also has control over the look and feel of the project and may leverage data collected about user activity for metrics reporting purposes or optimization strategies.

For more information:

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

https://support.office.com/en-us/article/Diagrams-fa9b7a59-3099-4637-820c-1b41b24fc2a7#ID0EAABAAA=BuildingPlansTab&ID0EABAAA=BuildingPlansTab

See also: https://techcommunity.microsoft.com/t5/Microsoft-Search-Blog/Introducing-Locations-in-Microsoft-Search-in-Bing/ba-p/291894


Customization

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

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

   ![Microsoft 365 admin center](image)

   *Figure 7.7 – This option allows you to show or hide navigation items in your navigation pane. Other admins won’t see your changes. To view hidden items, select **Show all** from the navigation pane.*

2. **Organizational profile** – Here, you’ll find several customization options, including the ability to set your **Release preferences**. Here, you will find three options:
   a. Standard release – Everyone in your org gets updates when Microsoft releases them broadly.
   b. Targeted release for everyone – Get updates early for your entire organization.
   c. Targeted release for selected users – With this option, you can manage people for Targeted release, to prepare your organization for upcoming updates.

3. **Manage custom themes for your organization** – With this option, you can customize Office 365 to reflect your organization’s brand. You can specify:
   a. Logo image, 200 x 30 pixels in size. You can upload a file or use an image from a URL.
   b. Make logo clickable.
   c. Background image (max. 1366 x 50 pixels, JPG, PNG, or GIF, no larger than 15 KB.)
   d. Color settings – Color of navigation bar, text and icon, and accent can all be customized.
Lesson 8: Go interactive with PowerApps

Lesson overview

In this lesson, we will learn how to create and publish PowerApps.

Objectives

After you complete this lesson you will be able to:

- Access the PowerApps Studio builder tool.
- Customize an existing PowerApps app.
- Publish a PowerApps app.

Time to complete

This lesson takes about 20 minutes.

Try it: Explore the PowerApps Studio builder app. (Sign-in required)
https://us.create.powerapps.com/studio/

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Figure 8.1 – Beginners might find it easiest to start with an app template
With the PowerApps service, you can build business apps that run in a browser, or on a phone or tablet—with no coding experience required. These integrated PowerApps appear directly within a bookmark result, eliminating the need to go to a different site or open a different tool.

For example, a bookmark to a page explaining how to book vacation time would make sense in a collection of human resources links. But it’s even better when the app that lets a user book vacation time off or report expenses is available right inside the bookmark.

![Figure 8.2 – You can share PowerApps with specific users only, your org only, or everyone](image)

**Be sure to share**

When you have finished creating a PowerApp, you can share it with everyone, or only with specific users or groups. This might be appropriate, for example, for a tool that contained data your company doesn’t want to share publicly.

If you don’t share the files with everyone, those who don’t have access will see an “[appname] needs your permission to continue” message like this:
Figure 8.3 – If you don’t have access, the PowerApp will present an “Almost there…” prompt for permission.

Share the file with others (e.g., names in your org’s active user list or everybody) to eliminate the issue.

Figure 8.4 – When shared with everyone, the PowerApp appears when you search for it.
Add interactive features with PowerApps: play video, work with data in a spreadsheet, and more.

Figure 8.5 – PowerApps can run in a browser, or on a phone or tablet—with no coding experience required. We built this example in a couple of hours.

Learn more:

- Intro to PowerApps: [http://powerapps.com/](http://powerapps.com/)
Lesson 9: Manage groups and access

Lesson overview

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

How to manage Microsoft Search in Bing users en masse

[Estimated time = 5 minutes]
If you aren’t doing it already, consider using groups to simplify user management and new feature rollouts. You could, for example, add users who have completed this training to a group and give that group Search Editor permissions. Or you could use conditional access (detailed in Lesson 3) to provide staged access to the service. Here are two ways of managing Microsoft Search in Bing users en masse:

1. Add users to a group and then provide conditional access to the group.
2. Enable or disable Microsoft Search in Bing for your entire organization.
Action 1: Add users to a group

![Image of MSIB Test Team Office 365 with Add members and results]

**Figure 9.1 – Add members**

![Image of MSIB Test Team Office 365 with message about group membership changes]

**Figure 9.2 – Group membership changes take effect immediately**

The following approaches can help to identify groups of users:

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

Action 2: 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.
Figure 9.3 – Microsoft Search in Bing’s on/off switch is found in Services & add-ins

1. In the Microsoft 365 admin center, select Settings
2. Select Services & add-ins
3. Scroll down to (or search for) Microsoft Search in Bing
4. Enable or disable the service and Save.

Figure 9.4 – It’s on by default
Action 3: Explore new group policy options

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/en-us/microsoft-edge/deploy/group-policies/search-engine-customization-gp#allow-search-engine-customization

An administrative template in the Group Policy Editor controls this and other options. Computer Configuration\Administrative Templates\Windows Components\Microsoft Edge

Note that the “Set default search engine” policy is only applicable to Windows 10 v1703 or newer. For more info, see https://docs.microsoft.com/en-us/microsoft-edge/deploy/group-policies/search-engine-customization-gp

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

Internet Explorer
For information on how to set the default search provider for IE11 using GPO, this MSDN post from 2016 details the steps and requirements. https://blogs.msdn.microsoft.com/askie/2016/12/30/how-to-set-my-default-search-provider-via-gpo/

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

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

In addition to the previously mentioned **Content Creator** extension, consider using Group Policy to install a useful browser extension called “Microsoft Search in Bing.” This extension (for Edge or Chrome) provides an easy way for authorized users to access Microsoft Search without leaving the page they’re on.

![Microsoft Search in Bing extension](image)

*Figure 9.6 – The Microsoft Search in Bing extension*

The extension provides a selection of “suggested searches for you” that can help users explore the capabilities of Microsoft Search; it also provides a “suggest a bookmark for this site” option that allows (non-admin) users to contribute bookmark suggestions.
These are then added as suggested bookmarks to the Microsoft Search admin center, where they can then be reviewed, edited, and published by administrators or Search Editors.
Release preferences are found in the Microsoft 365 admin center, under Settings > Organization profile. Select **Actions > Edit** to review or change settings.

The three options are:

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

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

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

Quiz

Q: What is another way to manage a staged rollout?
A: Another way to provide a staged rollout is to set up conditional access, as discussed in Lesson 3.

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

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

Overview

Configure self-service (optional)

Configure the ability for users to request access to this app.

After configuring this option, you will be able to:

- Allow users to request access to Microsoft Search in Bing
- Allow users to request a specific role using the self-service panel
- Manage the self-service approval process

Not everyone will see this panel—it only applies to premium Azure licenses—but it’s worth mentioning, in that it allows the admin to set up self-service options so that users can request access to various apps and services (of which Microsoft Search in Bing is just one of many examples). When you click the panel highlighted in Figure 10.1, below, you are taken to a screen that allows you to set various options, most of which are fairly self-explanatory.

Figure 10.1 – Configure self-service
This is the conditional access settings for Microsoft Search in Bing. This is a premium AAD features that enable tenants to restrict access to MSB to specific users, devices, policies, etc. It is something all Office applications support—Microsoft Search in Bing follows the standards that AAD already supports and is covered in depth [here](#).

This isn’t specific to Microsoft Search in Bing and is a customer promise that Microsoft/Office makes to give admins more control to conditionally allow/disallow access to specific applications. An example would be if a tenant didn’t want to allow their users to get email on their mobile device unless it was Intuned. (In fact, a policy like this is in effect at Microsoft today.)

**Notes:**

1) This self-service panel will *not* be visible to Contoso demo tenants, but live customers *might* see it, depending on their premium license.

2) The same goes for the greyed-out “diagnose and solve problems” item on the left. It will not appear for Contoso demo clients, but live customers might see it, depending on their premium license.
Appendix 2: Custom Connectors

Overview

Connectors allow you to add connections between data sources. You can connect Microsoft Search to any one of hundreds of pre-built Connectors, or even define your own custom connector. Connectors are not necessarily search-focused.

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

Here are some docs to help you get started with this advanced topic.

- Get started: https://docs.microsoft.com/en-us/flow/get-started-flow-dev
- Custom Connectors intro and tutorials: https://docs.microsoft.com/en-us/connectors/custom-connectors/index
- Create a custom Connector from scratch: https://docs.microsoft.com/en-us/connectors/custom-connectors/define-blank
Appendix 3: Products that include support for Microsoft Search in Bing

Microsoft 365 A3
Microsoft 365 A5
Microsoft 365 Business
Microsoft 365 E3
Microsoft 365 E5
Microsoft 365 F1
Office 365 A1
Office 365 A3
Office 365 A5
Office 365 Business Essentials
Office 365 Business Premium
Office 365 E1
Office 365 E3
Office 365 E5
Office 365 Education E1
Office 365 Education E3
Office 365 F1
OneDrive for Business (Plan 1)
OneDrive for Business (Plan 2)
SharePoint Online (Plan 1)
SharePoint Online (Plan 2)

Endnote: Future features

There are numerous features of Microsoft Search in Bing we haven’t covered in this training module. Some of the user-focused topics were addressed in the end-user training module and some will be covered in future lessons. Let us know which topics you’d like to see training materials for, and we’ll get to work on them.

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

Please give us feedback, so we can provide content that’s truly useful and helpful.

Complete our Microsoft Search in Bing Admin Survey.

Thanks!