

AN INTRODUCTION TO MICROSOFT 365 TENANT ADMINISTRATION



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WORKSHOP AGENDA: MORNING

- Introductory Information
- Born On Dates
- What Have I Gotten Myself Into?
- Understanding Your Subscription & Licensing
- Initial Tenant Configuration and Setup
- Tenant-Wide Admin and Configuration
- What If There Are Problems?
- Users And Groups
- Morning Wrap-up

CHECKLIST

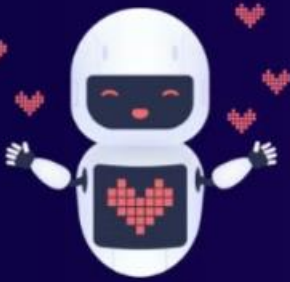


Q&A Throughout!



PHOTOGRAPHY DURING THE SESSION

Feel free to capture the moment! Taking pictures of the presentation, during the session is perfectly fine.



SELFIES WITH THE SPEAKER

We encourage interaction! If you'd like to take a selfie with the speaker, don't hesitate to ask. Most speakers will be happy to oblige during appropriate breaks.



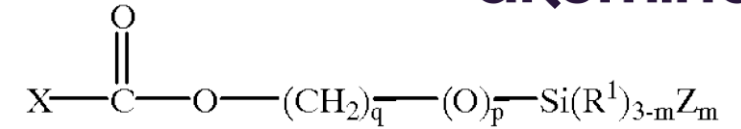
RECORDING AND LIVE STREAMING

Recording or live streaming the session, in part or in full, is strictly prohibited. Thank you for respecting our content and Speakers.

INTRODUCTORY INFORMATION



A BIT ABOUT ME ...



Started professional career as a polymer chemist for Procter & Gamble

- Transitioned within P&G to Information Systems

Developing software professionally since mid '90s

Focus has been primarily on SharePoint since 2004

Became a Microsoft MVP in 2016 (Office Apps & Services)



Nowadays, I work for Akumina, Inc.

- Senior Solution Architect and Consultant

Still have Bitstream Foundry going

- Good way to organize my professional activities
- Educational and non-profit technical services





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Blog: <https://SharePointInterface.com/>

About: <https://spmcdonough.com/>

SOME HOUSEKEEPING



- **This is a full-day workshop.**
 - We go from 9am PST until 5pm PST.
- **We will break for lunch around 12:30pm PST.**
 - There is one hour allotted for lunch.
 - Lunch is in the 6ABC Lobby (you won't miss it).
- **Come and go as you want or need.**
 - I only ask that you leave and enter quietly for the benefit of the other attendees.
- **Today's materials will be/are available.**
 - They're available through the Whova app.
 - I'll post them on my blog, as well. Don't worry, I'll show the contact information again near today's conclusion.
- **And to make sure we're all here expecting the same thing ...**

ABSTRACT FOR THIS WORKSHOP

An Introduction to Microsoft 365 Tenant Administration

So, you were just handed a Microsoft 365 (M365) tenant in the cloud. Congratulations are in order! Now that we've dispensed with the pleasantries, you're probably wondering what the heck you're supposed to do with that tenant. If so, you're in luck, as this workshop is designed specifically for you and others who find themselves with the same basic question.

In this workshop, we approach M365 tenant administration from the perspective of someone who now has tenant administration responsibilities without necessarily knowing what that means or encompasses. We'll spend some time learning the terminology, bounds, and different pieces of tenant administration.

We'll also investigate how the admin experience is partially coupled to how your organization is licensed. We'll cover what you need to do to establish your new tenant, and we'll take a tour of the various admin surfaces available to M365 administrators.

By the end of this workshop, you'll have a functional understanding of M365 administration and the tools you have available to implement *your plan for world domination* your organization's cloud vision.

A BIT ABOUT “BORN ON” DATES



A BIT ABOUT “BORN ON” DATES



- This is Microsoft 365 (M365) and its constituent workloads.
- Microsoft refers to these services as “evergreen services.”
- That carries some implications ...
- Some of the information I’m going to share has a “shelf life.”

A BIT ABOUT “BORN ON” DATES (CONTINUED)



Please don't look me up in five years and send me “fan mail” because I presented something that is no longer accurate due to a Microsoft 365 service change. You may laugh, but it will ~~happen~~ *has happened!*

Dear Sean,

I was reviewing a workshop you put together five years ago, and I found elements that were incorrect. You are a horrible person and you should never touch Microsoft 365 Administration again.

*Love you lots!
-an attendee*

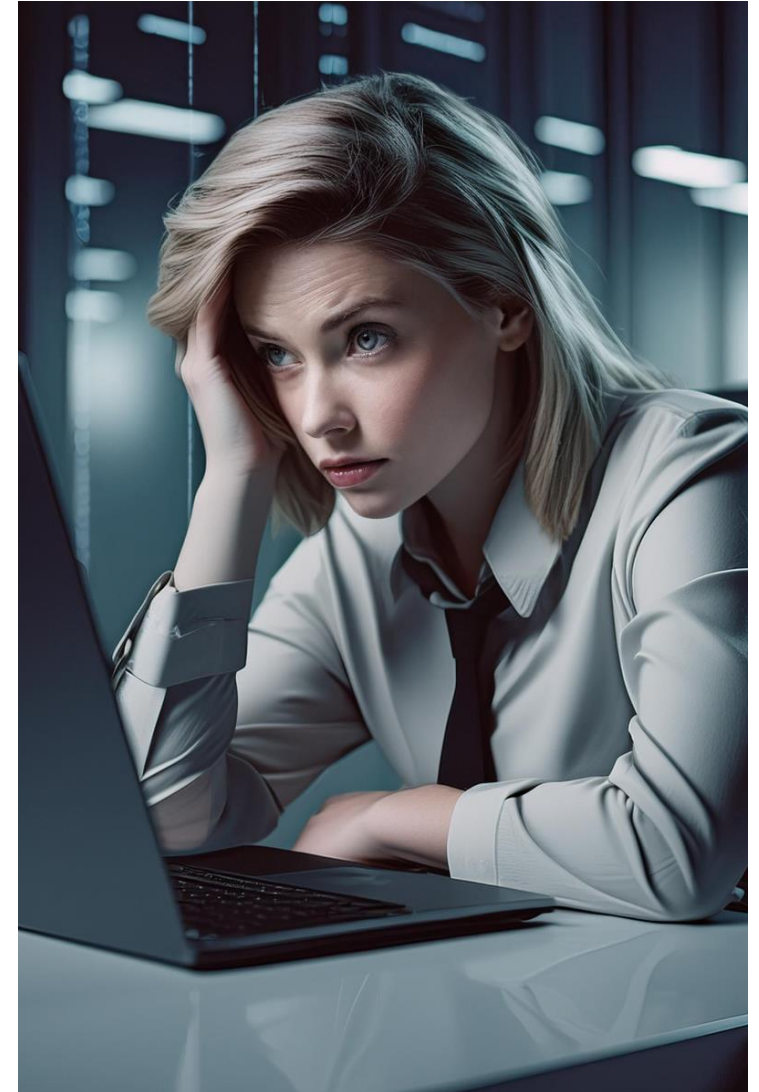


**WHAT HAVE I GOTTEN
MYSELF INTO?**

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YOU'RE THE (NEW) ADMINISTRATOR!

- Whether by choice or out of necessity, you have admin control of a Microsoft 365 (M365) tenant.
- M365 assumptions I'll be making going forward:
 - M365 now adheres to role-based access control (RBAC), so ...
 - You are a global tenant administrator with permissions across your tenant and its various workloads.
 - You don't have a lot of experience (maybe any experience) with M365 administration.
 - You may have some experience but lack confidence.
 - Maybe you once administered a tenant, but that was a long time ago and everything seems to have changed.
- Other assumption
 - You have access to your tenant now to try out the concepts we're going to be discussing.

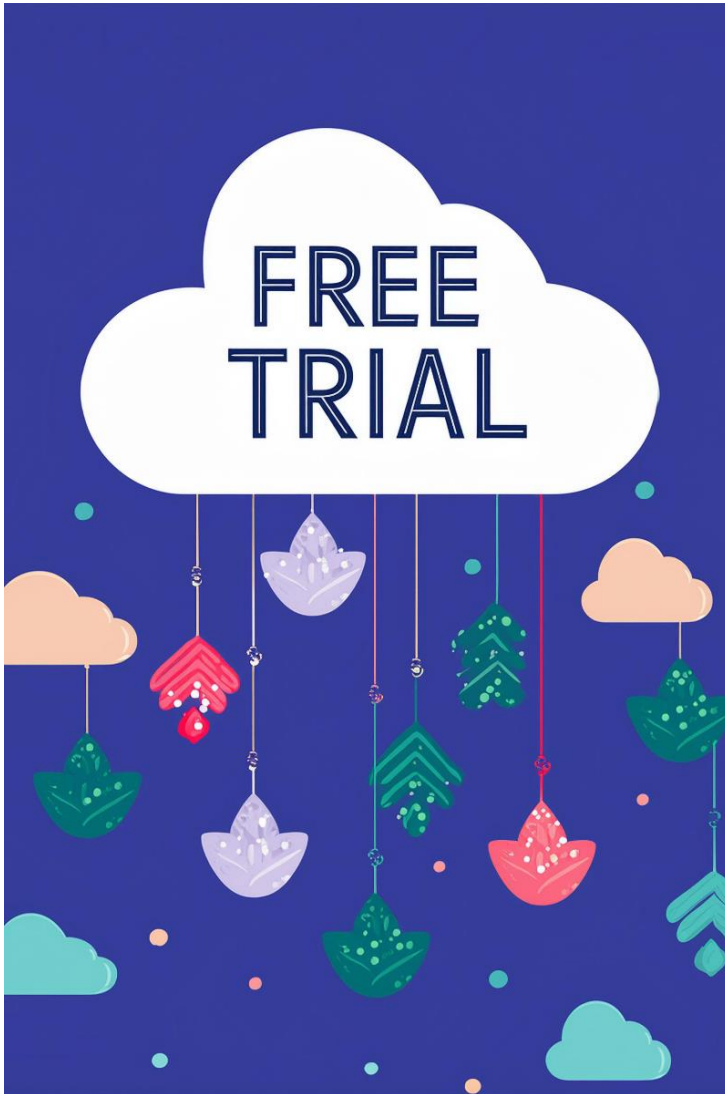


REFERENCES AND MATERIALS



- At the end of this presentation, you will find a variety of references and other materials you can examine for additional context & content.
- This workshop is loosely based on a variety of Microsoft Learn modules:
 - [Configure your Microsoft 365 experience](#)
 - [Manage users, licenses, guests, and contacts in M365](#)
 - [Manage groups in Microsoft 365](#)
 - [Add a custom domain in Microsoft 365](#)
 - [Configure client connectivity to Microsoft 365](#)
- If you would like to learn more but cannot find a reference, let me know.
- **DISCLAIMER:** I am not an M365 admin expert, nor do I expect any of you to become one!

IF YOU DON'T HAVE A TENANT



- If you were hoping to try out the examples and activities throughout the workshop, there is another option (provided you have a computer with you).
 - Consider signing up for a free M365 trial.
 - The trial is free for one month, and you can cancel at anytime.
 - Go to <https://www.microsoft.com/en-us/microsoft-365/try>
- Trials available for the following relevant plans:
 - M365 Business Standard
 - M365 Business Premium
- You will need a credit card.
 - But it doesn't get billed until the trial ends.
 - Cancel before the end of the trial to avoid charges.

UNDERSTANDING YOUR SUBSCRIPTION AND LICENSING

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THERE BE MONSTERS HERE

- As anyone who has dealt with licensing of Microsoft products can tell you, it's something of a “dark and nefarious art.”
- Ask three different Microsoft licensing experts what you need in terms of licenses for a given situation, and you'll get at least four different answers.
- Why do we really care about licensing?
 - There are a number of different M365 licenses that deliver different cloud capabilities and workloads.
 - By extension, the workloads and capabilities you have available to you depend on the license(s) assigned to you.
- It's worth looking at the M365 license landscape.



MICROSOFT 365 LICENSING

- These are the M365 “family plans” available at the time of workshop creation.
- If you are just talking about a few people (like many families), these make economic sense
- Just as with M365 administration, I am NOT a licensing expert.
- Get much of M365 functionality at less expense.
- Can still add other licenses.

Microsoft 365

Family

Best value for 2-6 people

\$99.99/year

Buy now

Or buy at \$9.99/month

Try free for 1 month

You'll pay \$99.99/year after the first trial month.

Access to the latest updates as long as your subscription lasts

W X P O E N T

Up to 6 people **6 x** 👤

Up to 6 TB of cloud storage (1 TB private storage per person) **6 x 1 TB** ☁

Use on up to 30 devices at the same time (5 devices per person) **6 x 5** 📱

Use on PC, Mac, Chromebook, iPad, iPhone, and Android tablets and phones 🖥 📱 📺 📺

Microsoft Defender data and device security **New** 🛡

Ongoing technical support 🗣

Microsoft 365

Personal

\$69.99/year

Buy now

Or buy at \$6.99/month

Access to the latest updates as long as your subscription lasts

W X P O E N T

1 person **1** 👤

1 TB cloud storage **1 TB** ☁

Use on up to 5 devices at the same time **5** 📱

Use on PC, Mac, Chromebook, iPad, iPhone, and Android tablets and phones 🖥 📱 📺 📺

Microsoft Defender data and device security **New** 🛡

Ongoing technical support 🗣

MICROSOFT 365 LICENSING

- What I'm sharing is based on currently available licensing and M365 plans.
- Just as with M365 administration, I am NOT a licensing expert.
- Business plans are listed to the right.
 - Every now and then, capabilities and costs go through a shuffle.
 - If you have a deprecated subscription, Microsoft is pretty good about mapping your licenses to a new (and current) subscription/license
 - From the maximum employee count, you can see that these plans are designed more for small businesses than enterprises.
 - We will be looking at enterprises next.
 - Plenty of licenses can be added on top of these.

Microsoft Teams Essentials

\$4.00 user/month
(Annual subscription—auto renews)²

[Buy now](#)

✓ Unlimited group meetings for up to 30 hours
✓ Up to 300 participants per meeting
✓ 10 GB of cloud storage per user
✓ Phone and web support
✓ Unlimited chat with coworkers and customers
✓ File sharing, tasks, and polling
✓ Data encryption for meetings, chats, calls, and files
✓ Live captions in meetings⁴
✓ Whiteboard
✓ Hundreds of collaborative apps
✓ Collaborative annotations in Teams meetings, so participants can contribute to shared content
✓ Team meetings recordings with transcripts
✓ Standard security

Microsoft 365 Business Basic

\$6.00 user/month
(Annual subscription—auto renews)²

[Buy now](#)

[Try free for one month >](#)

[See trial terms³](#)

Everything offered in Teams Essentials, plus:

- ✓ Identity, access, and user management for up to 300 employees
- ✓ Custom business email (you@yourbusiness.com)
- ✓ Web and mobile versions of Word, Excel, PowerPoint, and Outlook
- ✓ 1 TB of cloud storage per employee
- ✓ 10+ additional apps for your business needs (Microsoft Bookings, Planner, Forms, and others)
- ✓ Automatic spam and malware filtering
- ✓ Anytime phone and web support

Secure cloud services:

Teams Exchange OneDrive SharePoint

Web and mobile apps only:

Outlook Word Excel PowerPoint

Copilot for Microsoft 365 available as an add-on.⁵

Microsoft 365 Business Standard

\$12.50 user/month
(Annual subscription—auto renews)²

[Buy now](#)

[Try free for one month >](#)

[See trial terms³](#)

Everything offered in Business Basic, plus:

- ✓ Desktop versions of Word, Excel, PowerPoint, and Outlook
- ✓ Webinars with attendee registration and reporting
- ✓ New: Collaborative workspaces to co-create using Microsoft Loop
- ✓ New: Video editing and design tools with Microsoft Clipchamp

Copilot for Microsoft 365 available as an add-on.⁵

Desktop, web, and mobile apps and secure cloud services:

Word Excel PowerPoint Outlook

Teams OneDrive SharePoint Exchange

Clipchamp Microsoft Loop

MICROSOFT 365 LICENSING

- The chart to the right covers the enterprise licensing you will typically see in large companies, government agencies, etc.
- Analogs of these plans exist for governments (typically denoted with a “G”), education, non-profits, kiosks, frontline workers, and more.
- In addition, you can add additional licenses for products you might want. Great example: Microsoft Visio.
- Just so you’re aware, I’ll be using my BitstreamFoundry.com tenant for today.
 - It has Microsoft 365 E5 licensing with Co-Pilot
 - One of the benefits afforded to Microsoft MVPs

Copilot for Microsoft 365 available as an add-on.²

Microsoft 365 E3 (no Teams)

\$33.75
user/month
(Unlimited users)

[Contact Sales](#)

[Learn more >](#)

Microsoft 365 E3 combines best-in-class enterprise productivity apps with core security and compliance capabilities.

- ✓ Improve productivity and foster a culture of collaboration with connected experiences.
- ✓ Transform how you manage your business and enhance customer relationships with integrated workflows.
- ✓ Proactively protect your employees, data, and customer information with intelligent security.

Microsoft Teams licensed separately. [Learn more about the new subscription structure.](#)

Apps and services included

Copilot for Microsoft 365 available as an add-on.²

Microsoft 365 E5 (no Teams)

\$54.75
user/month
(Unlimited users)

[Contact Sales](#)

[Learn more >](#)

Microsoft 365 E5 combines best-in-class productivity apps with advanced security, compliance and analytical capabilities.

- ✓ Extend identity and cyberthreat protection with integrated and automated security to help stop damaging cyberattacks.
- ✓ Bring together information protection and advanced compliance capabilities to protect and govern data while reducing risk.
- ✓ Benefit from Power BI capabilities that help you realize significant business value from your data.

Microsoft Teams licensed separately. [Learn more about the new subscription structure.](#)

Apps and services included

Microsoft Copilot for Microsoft 365

[Learn more](#)

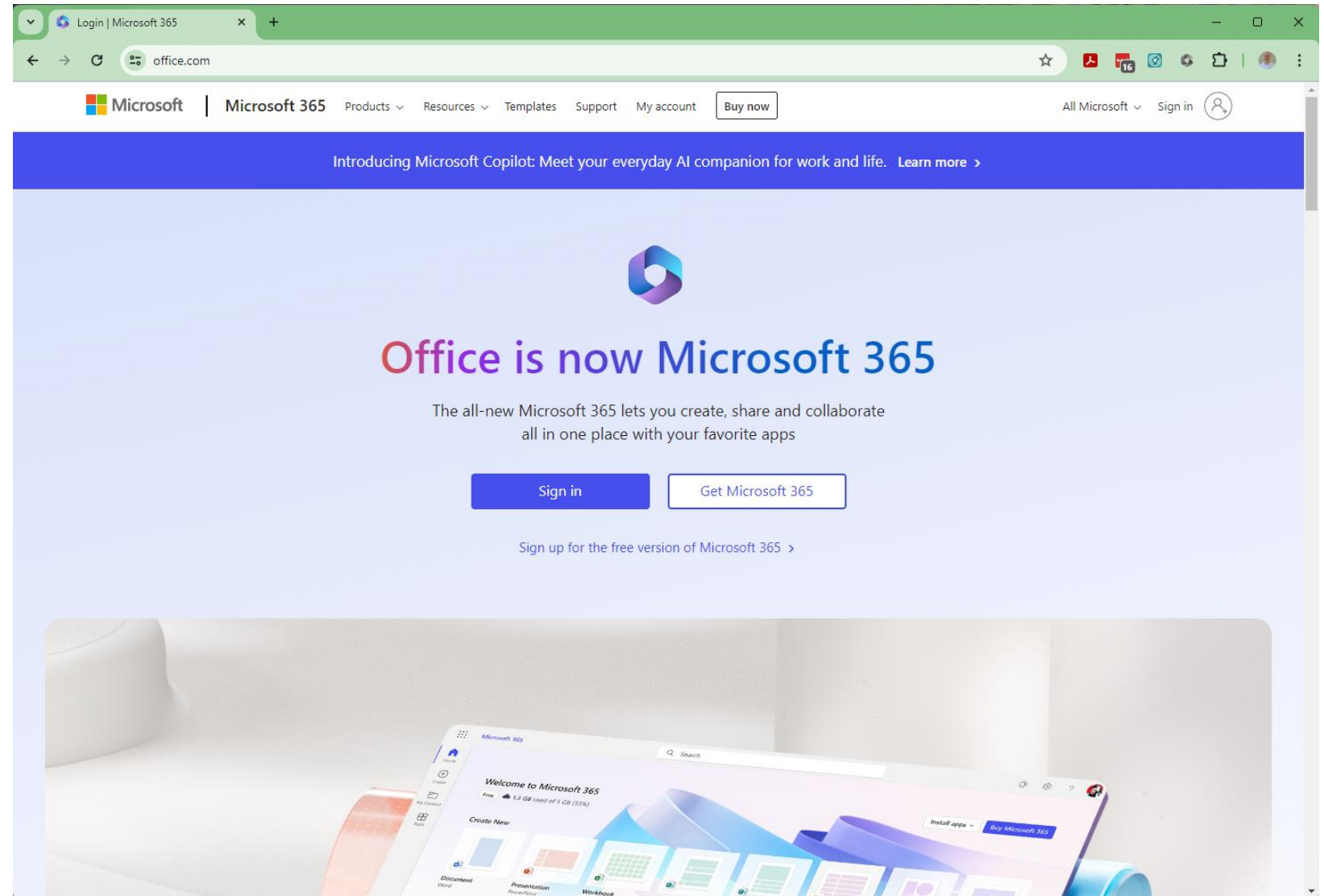
- ✓ Integrated with Teams, Word, Outlook, PowerPoint, Excel, and other Microsoft 365 apps
- ✓ AI-powered chat with Microsoft Copilot
- ✓ Connect to your data in third-party apps using Copilot Studio.
- ✓ Enterprise-grade security, privacy, and compliance

A product license for Microsoft 365 Business Standard, Business Premium, E3, E5 or Office 365 E3 or E5 is required to purchase Copilot for Microsoft 365

ANOTHER WAY TO VIEW LICENSES

Login to Microsoft 365 admin through an available URL

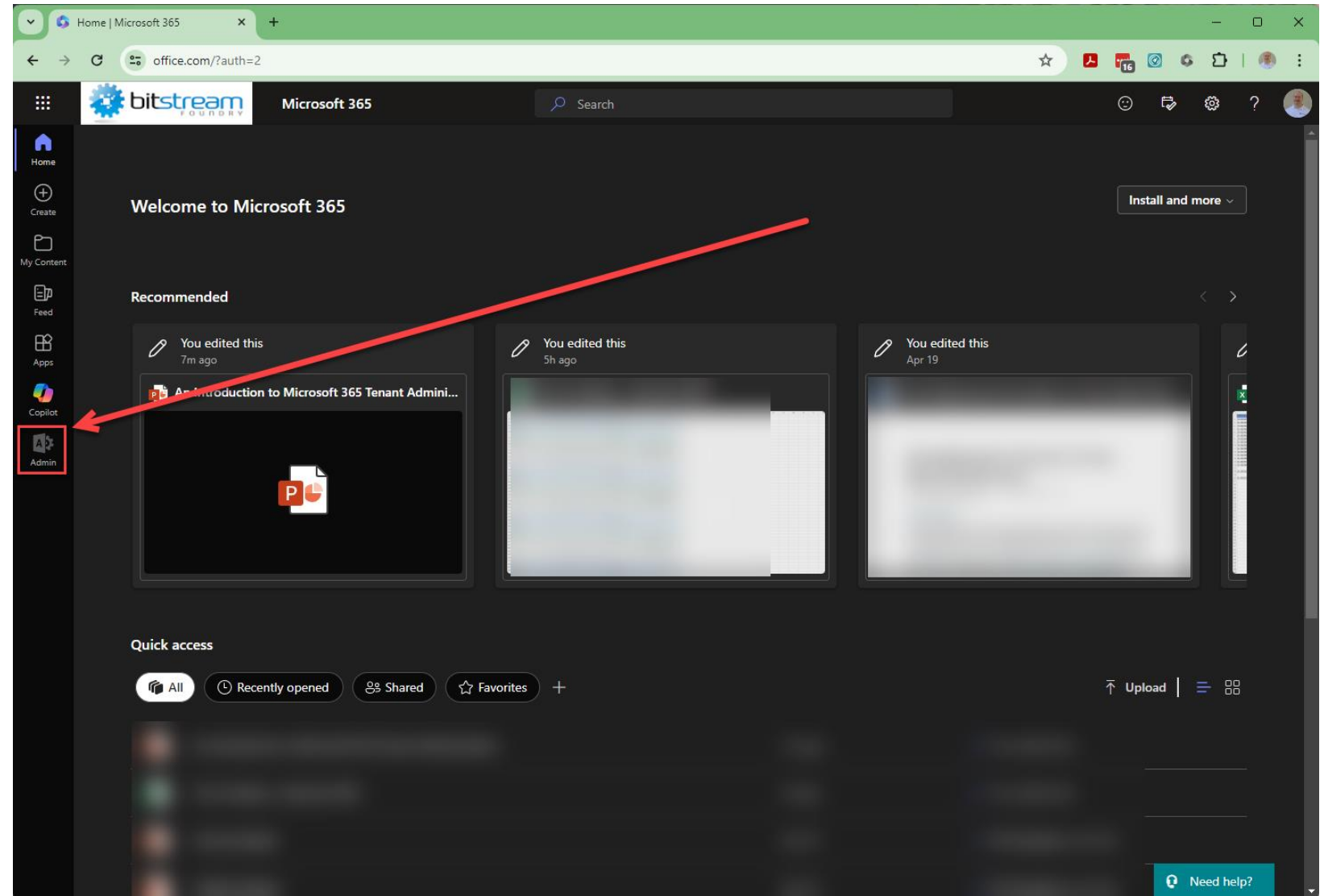
- <https://config.office.com> is one way.
- I commonly just go to <https://office.com> and select the admin tools from the waffle menu.
- You just need to get authenticated to the M365 tenant of your choice and find an admin tool selector, common in the left rail that appears.

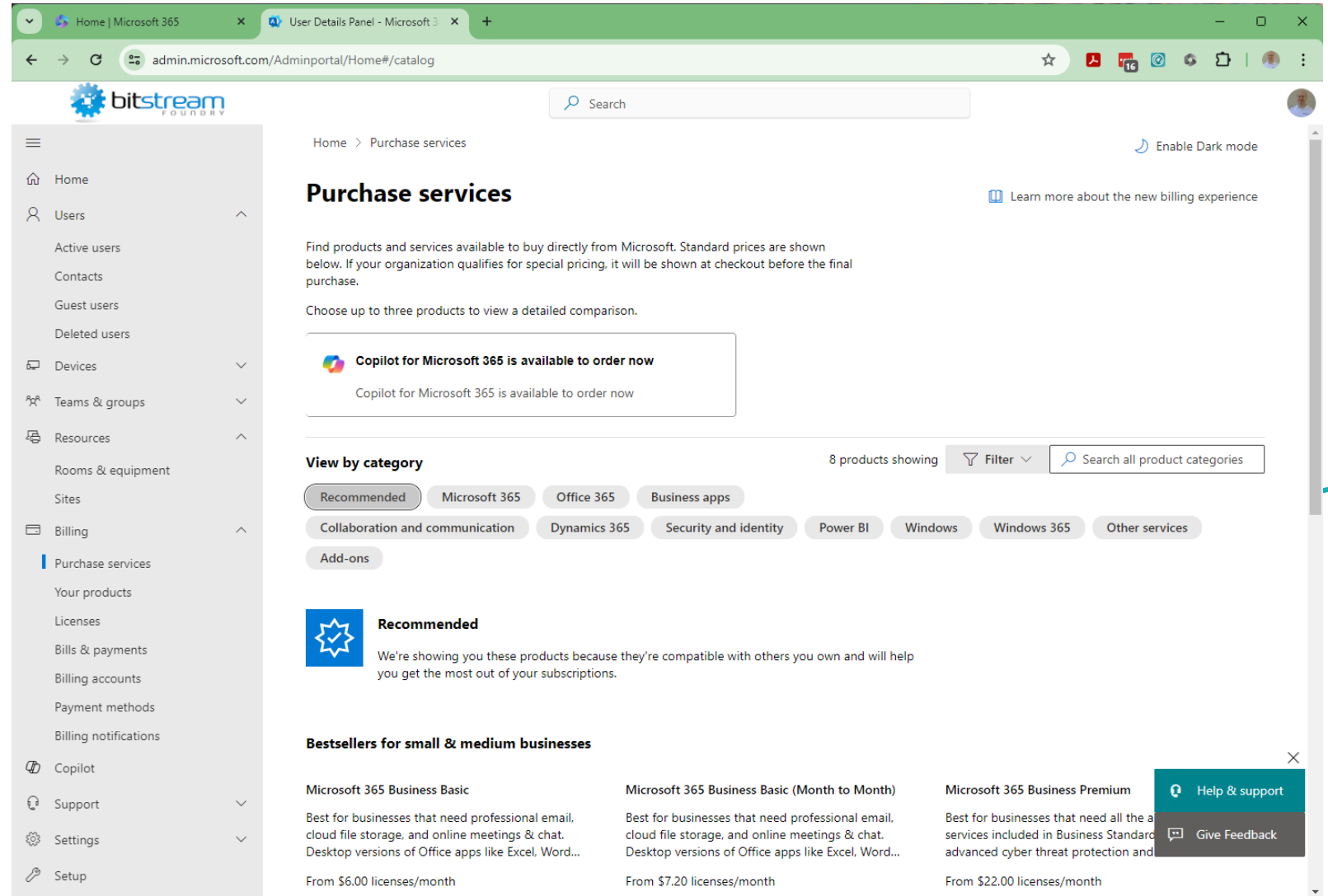


ANOTHER WAY TO VIEW LICENSES

Login to Microsoft 365 admin through an available URL

- <https://config.office.com> is one way.
- I commonly just go to <https://office.com> and select the admin tools from the waffle menu.
- You just need to get authenticated to the M365 tenant of your choice and find an admin tool selector, common in the left rail that appears.
- Let's take a look now.





Home | Microsoft 365 x User Details Panel - Microsoft 3 x

admin.microsoft.com/Adminportal/Home#/catalog

bitstream FOUNDRY

Search

Home > Purchase services

Enable Dark mode

Learn more about the new billing experience

Purchase services

Find products and services available to buy directly from Microsoft. Standard prices are shown below. If your organization qualifies for special pricing, it will be shown at checkout before the final purchase.

Choose up to three products to view a detailed comparison.

Copilot for Microsoft 365 is available to order now

Copilot for Microsoft 365 is available to order now

View by category 8 products showing Filter Search all product categories

Recommended Microsoft 365 Office 365 Business apps

Collaboration and communication Dynamics 365 Security and identity Power BI Windows Windows 365 Other services

Add-ons

Recommended

We're showing you these products because they're compatible with others you own and will help you get the most out of your subscriptions.

Bestsellers for small & medium businesses

Product	Description	Pricing
Microsoft 365 Business Basic	Best for businesses that need professional email, cloud file storage, and online meetings & chat. Desktop versions of Office apps like Excel, Word...	From \$6.00 licenses/month
Microsoft 365 Business Basic (Month to Month)	Best for businesses that need professional email, cloud file storage, and online meetings & chat. Desktop versions of Office apps like Excel, Word...	From \$7.20 licenses/month
Microsoft 365 Business Premium	Best for businesses that need all the services included in Business Standard advanced cyber threat protection and	From \$22.00 licenses/month

Help & support

Give Feedback

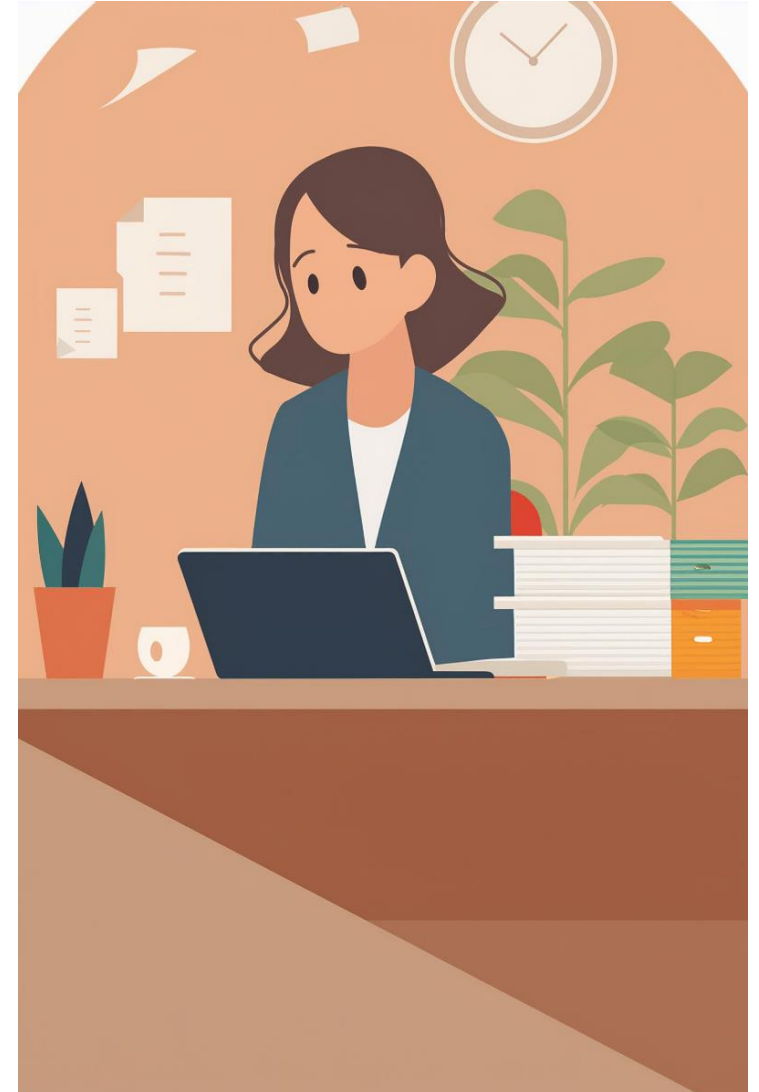
A BRIEF TOUR OF M365 ADMIN TO REVIEW AVAILABLE LICENSING

In the top-left corner, there are two overlapping geometric shapes: a magenta rounded triangle pointing towards the bottom-right, and a yellow triangle pointing towards the bottom-left.

INITIAL TENANT SETUP AND CONFIGURATION

DO YOU NEED TO DO THIS?

- If you've inherited the administration of an established M365 tenant, there might be little-to-nothing for you to do.
 - Many of the “hard decisions” have already been made.
- What does initial tenant setup and config entail?
 - Establishing a Microsoft Account (if needed).
 - Finding a unique name for your tenant.
 - Applying appropriate company branding.
- Asking yourself some questions:
 - What licenses are appropriate for my tenant and its users?
 - Will this tenant be cloud-only, or do I need to synchronize with an on-premises Active Directory domain?
 - Do I want to tie a custom/vanity URL to my tenant?
 - Who will the admins be, and what roles do they require?



GENERAL GUIDANCE FOR ADMIN ROLES

- Admins have privileged access to your tenant's data, and Microsoft recommends the following in general

Recommendation	Why is this important?
Have 2 to 4 Global Admins	Global Admins have almost unlimited access to your organization's settings and most of its data. We recommend you limit the number of Global Admins as much as possible. A Global Admin may inadvertently lock their account and require a password reset. Either another Global Admin or a Privileged Authentication Admin can reset a Global Admin's password. Therefore, we recommend you have at least either one more Global Admin or a Privileged Authentication Admin in the event a Global Admin locks their account.
Assign the <i>least permissive</i> role	Assigning the <i>least permissive</i> role means giving admins only the access they need to get the job done. For example, if you want someone to reset employee passwords you shouldn't assign the unlimited global admin role, you should assign a limited admin role, like Password admin or Helpdesk admin.
Require multi-factor authentication for admins	<p>It's actually a good idea to require MFA for all of your users, but admins should definitely be required to use MFA to sign in. MFA makes users use a second method of identification to verify their identity. Admins can have access to much of customer and employee data. If you require MFA, even if the admin's password gets compromised, the password is useless without the second method of identification.</p> <p>When you turn on MFA, the next time the user signs in, they'll need to provide an alternate email address and phone number for account recovery.</p> <p>Set up multi-factor authentication</p>

PERMISSIONS OF M365 ADMIN ROLES & GROUPS

- You might wonder which permissions and rights are afforded to a particular admin role.
- The chart below covers some common admin roles.
 - Note: these aren't the only admin roles!
 - The list is quite exhaustive; see the references section for more info.
- You can add external users to roles on a permanent temporary basis.
- Note: we'll talk about standard users later in the workshop.











Admin Role	M365 Groups	Security Groups	Distribution Groups	Mail Enabled Security Groups
Global admin	Create, Read, Update, Delete	Create, Read, Update, Delete	Create, Read, Update, Delete	Create, Read, Update, Delete
Global reader	Read	Read	Read	Read
User admin	Create, Read, Update, Delete, <i>Can't update EXO properties</i>	Create, Read, Update, Delete	Read	Read
Exchange admin	Create, Read, Update, Delete	Read, Update - <i>only groups they own</i> , Delete - <i>only groups they own</i>	Create, Read, Update, Delete	Create, Read, Update, Delete
Teams admin	Create, Read, Update, Delete, <i>Can't update EXO properties</i>	Create, Read, Update, Delete - <i>only groups they own</i>	Read	Read
SharePoint admin	Create, Read, Update, Delete, <i>Can't update EXO properties</i>	Create, Read, Update, Delete - <i>only groups they own</i>	Read	Read
Billing admin	Read	Read	Read	Read
Skype admin	Read	Read	Read	Read
Service admin	Read	Read	Read	Read
Group admin	Create, Read, Update, Delete, <i>Can't update EXO properties</i>	Create, Read, Update, Delete	Read	Read

APPLYING ORGANIZATIONAL SELECTIONS



- Chances are that your organization has invested in their corporate branding strategy. This can include
 - Organizational Logos
 - Specific colors and color combinations for use
 - Typography and Fonts
 - Branding Guidelines and Similar Directives
- M365 makes it relatively easy to apply an “organizational profile” from the admin tools.
- We’re going to spend a few minutes looking at the different options available to us at this point in time.

YOUR ORGANIZATIONAL PROFILE

Name ↑	Description
 Custom themes	Customize Microsoft 365 for your organization.
 Custom tiles for Apps	Add tiles that open websites or SharePoint sites to Apps in the Microsoft 365 app.
 Data location	See where Microsoft stores your data for each service you use.
 Help desk information	Streamline user support by adding customized contact info to the Microsoft 365 help pane.
 Keyboard shortcuts	Perform many common tasks using the keyboard. You can also see the full list of supported shortcuts by pressing Shift+? (question mark).
 Multitenant collaboration	Enable users in your multitenant organization to collaborate seamlessly.
 Organization information	Update your organization's contact info, such as your address, phone number, and technical contact.
 Release preferences	Choose how your organization gets new features and service updates from Microsoft 365.
 Send email notifications from your domain	Let Microsoft send notification messages from an email address within your organization instead of Microsoft's default external email address.
 Support integration	Integrate your internal support tools with Microsoft 365.

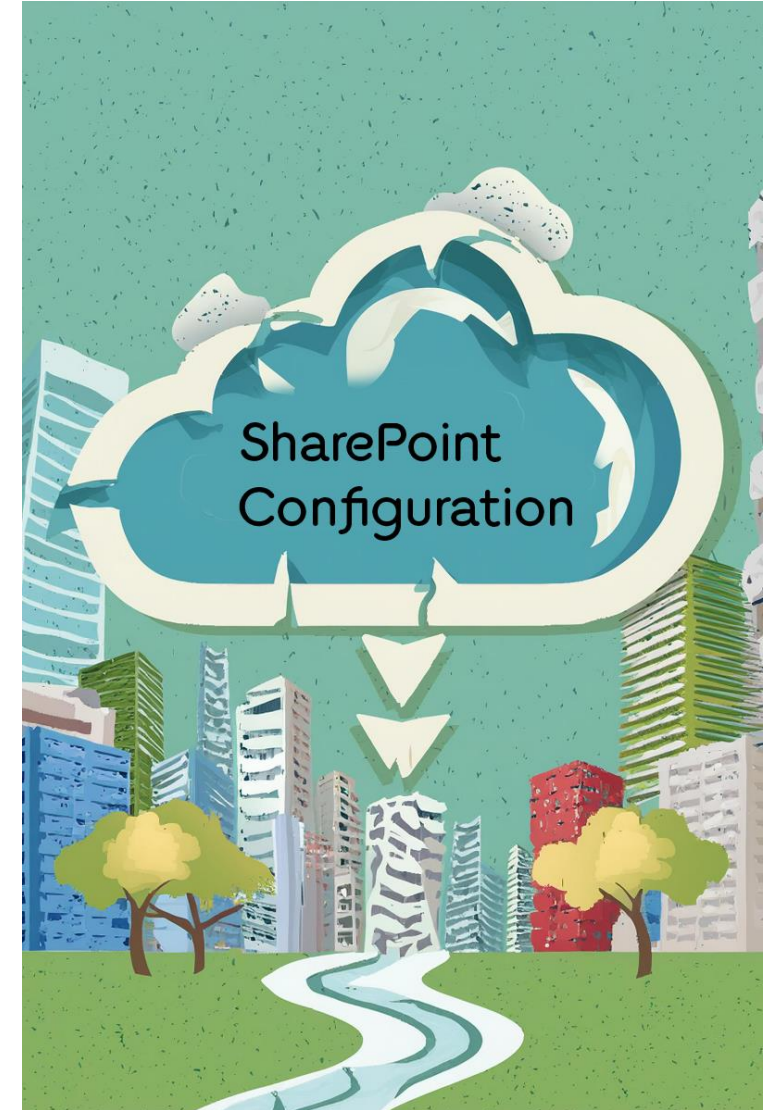
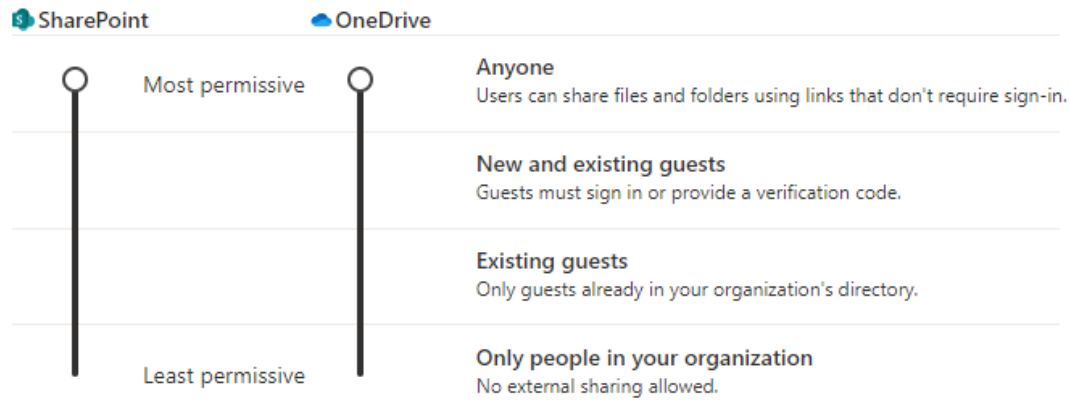
TENANT-WIDE ADMIN AND CONFIGURATION

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TENANT-LEVEL SHARING POLICIES

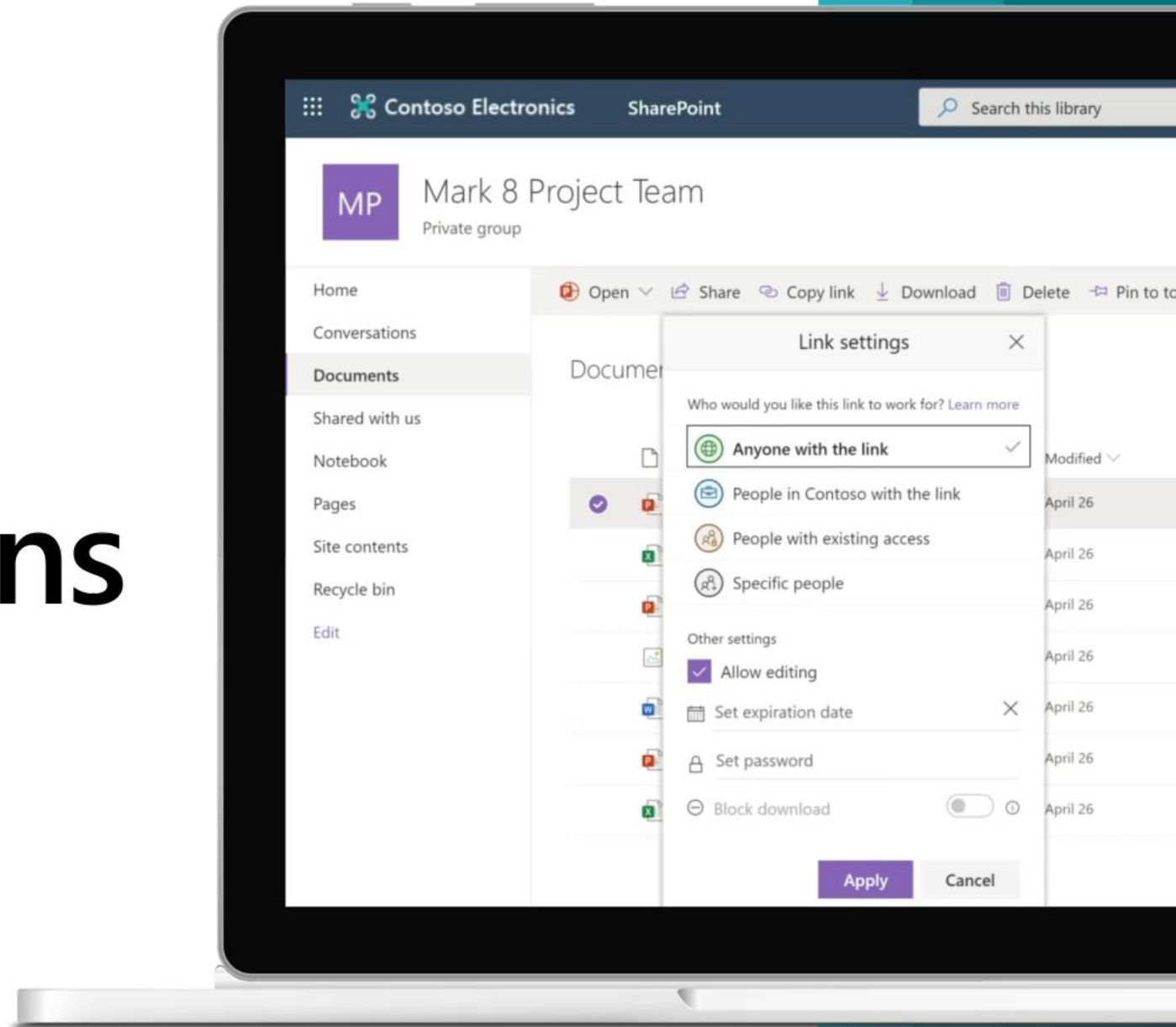
- We're talking about sharing with the SharePoint and OneDrive workloads
 - By default, the ability share content externally is turned on.
 - Many organizations don't like this and will want to change it.
 - If you want to adjust sharing settings, doing so before turning your users loose in the tenant is advised.
- SharePoint and OneDrive sharing defaults can be configured separately.

Content can be shared with:

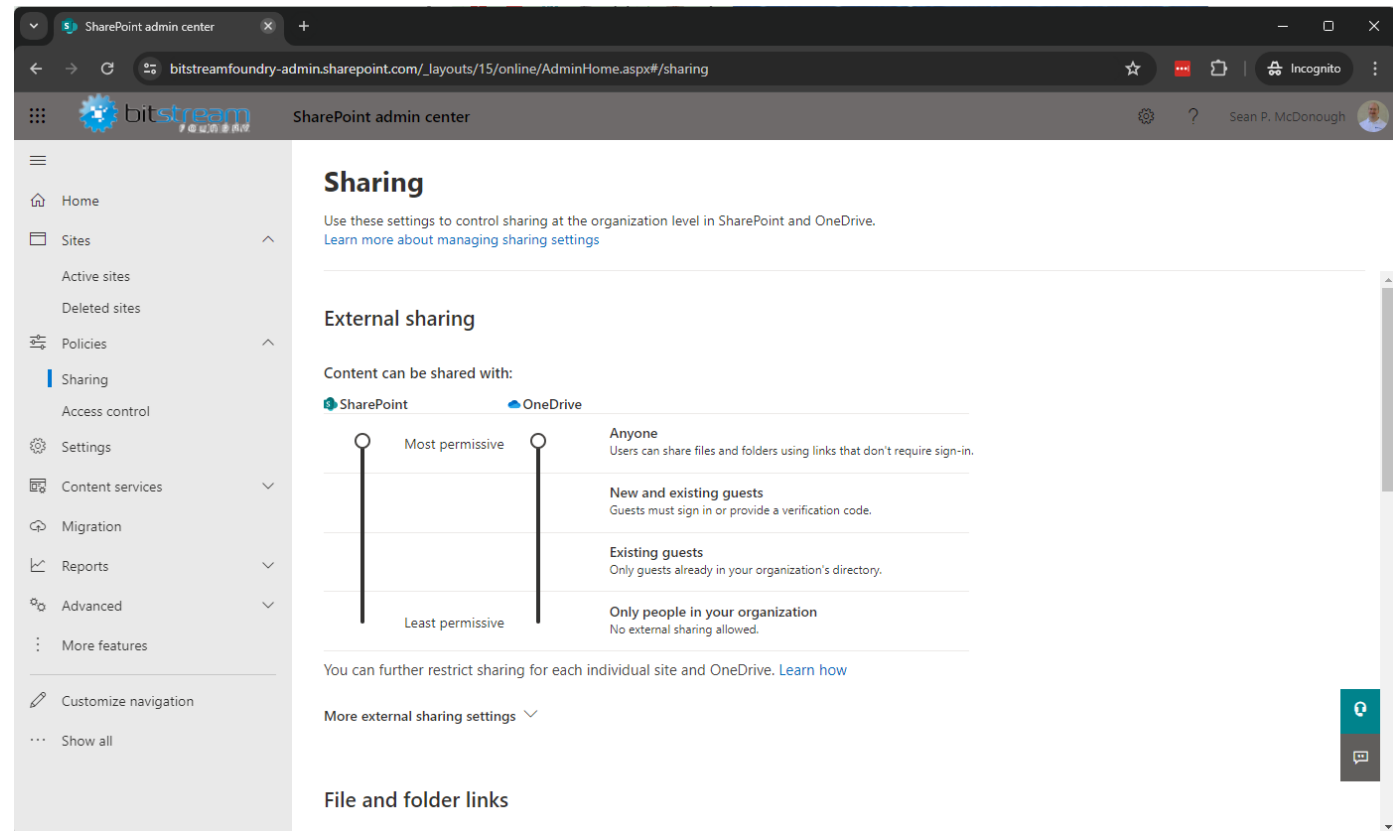


SharePoint

Control user sharing options



A QUICK LOOK AT SHARING CONTROLS



SharePoint admin center

bitstream

Sharing

Use these settings to control sharing at the organization level in SharePoint and OneDrive.
[Learn more about managing sharing settings](#)

External sharing

Content can be shared with:

SharePoint OneDrive

Most permissive Least permissive

Anyone
Users can share files and folders using links that don't require sign-in.

New and existing guests
Guests must sign in or provide a verification code.

Existing guests
Only guests already in your organization's directory.

Only people in your organization
No external sharing allowed.

You can further restrict sharing for each individual site and OneDrive. [Learn how](#)

[More external sharing settings](#)

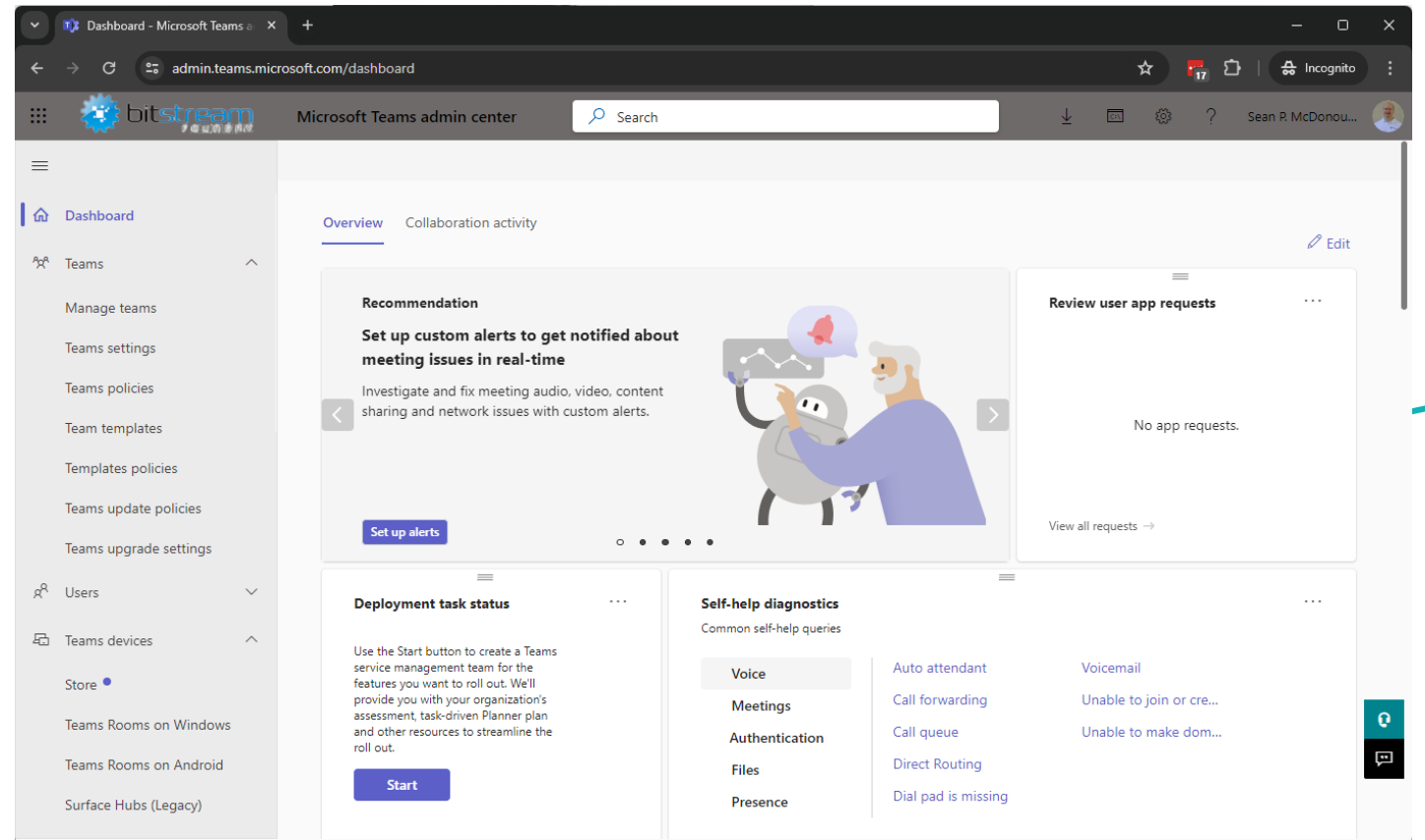
File and folder links

TENANT LEVEL TEAMS SETTINGS



- The majority of organizations using M365 rely heavily on Microsoft Teams.
 - If your organization is the same way, you'll want to review your Teams configuration at a minimum.
- Like most M365 workloads, Microsoft tends to release new admin controls, features, and capabilities every two weeks.
 - Check out the [release note for Microsoft Teams admin features](#).
- The Teams admin center does more than just settings and configuration.
 - Provides Teams feature deployment planning.
 - There are self-help diagnostic tools
 - An ability to set up alerts regarding meeting issues.
 - Analytics and reports galore.

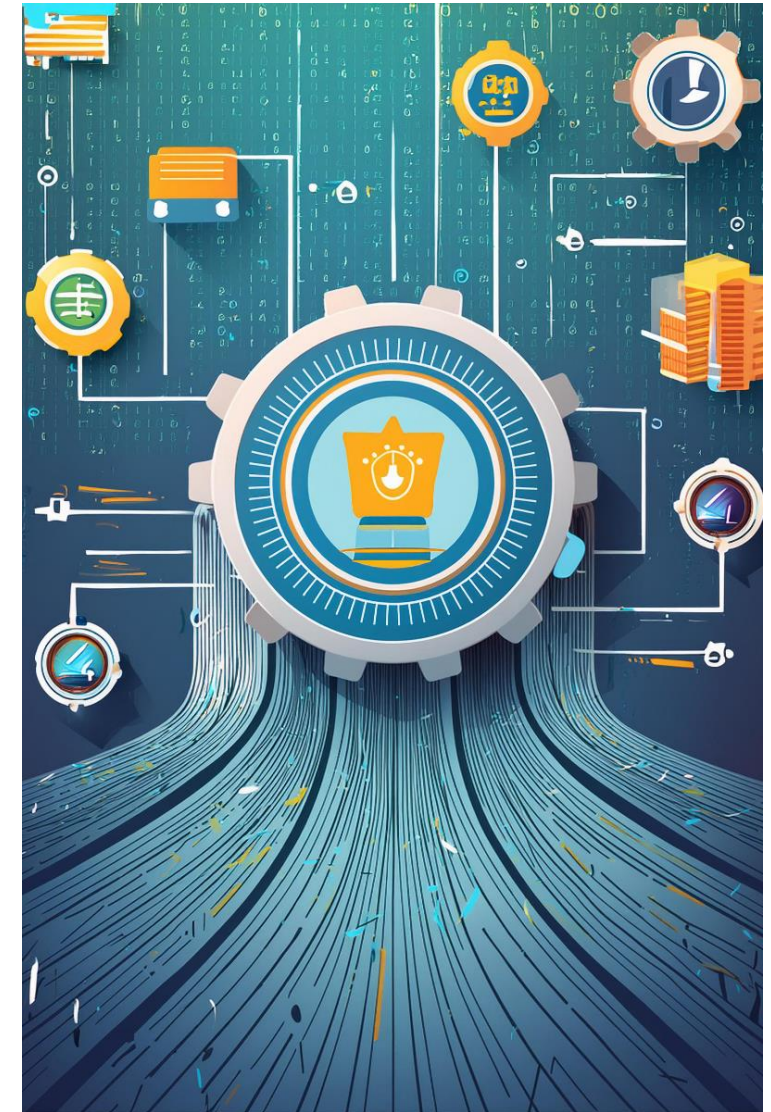
EXPLORING THE TEAMS ADMIN CENTER



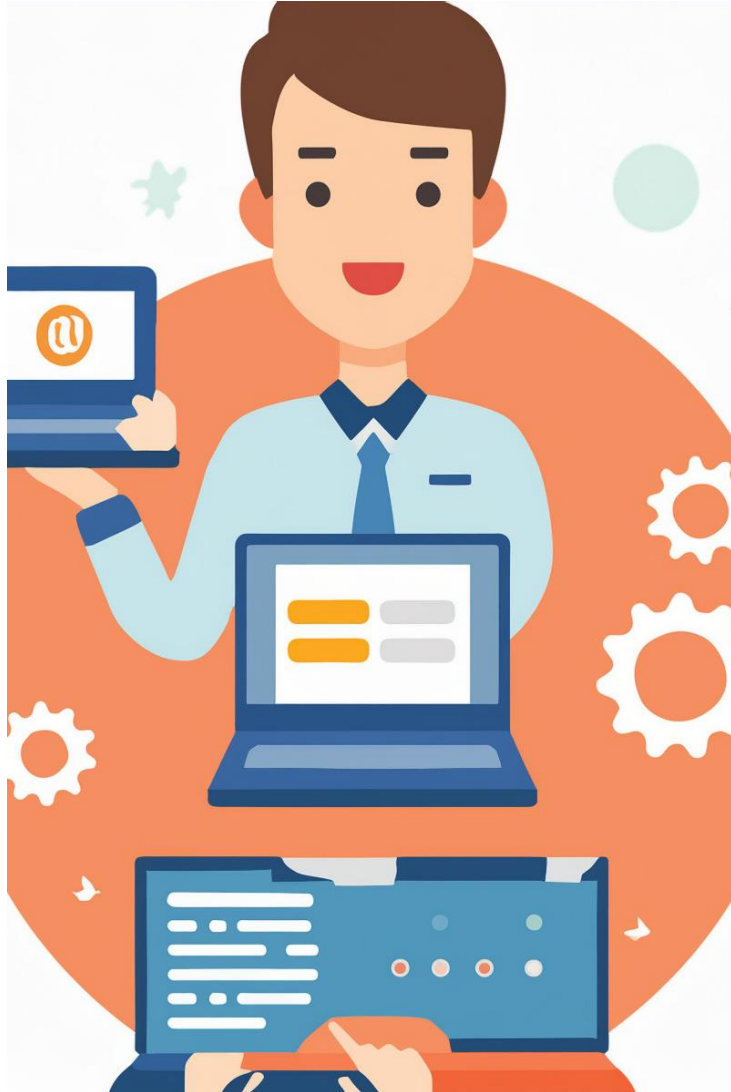
MICROSOFT 365 UNIFIED LOGGING

- **M365 has unified logging across workloads.**
 - Logging is turned on by default (thankfully).
- **Logging wasn't always unified.**
 - In the earlier days of M365, each workload admin center that had its own way of doing things.
 - You would have to work across multiple logging systems
 - Workloads were not consistent with how they approached logging and general administration.
- **Retention period for audit data is 180 days.**
 - Prior to the middle of October of 2023, it was 90 days.
- **Best bet when starting: verify the state of unified logging. Powershell is our friend in this.**

```
Get-AdminAuditLogConfig | Format-List UnifiedAuditLogIngestionEnabled
```

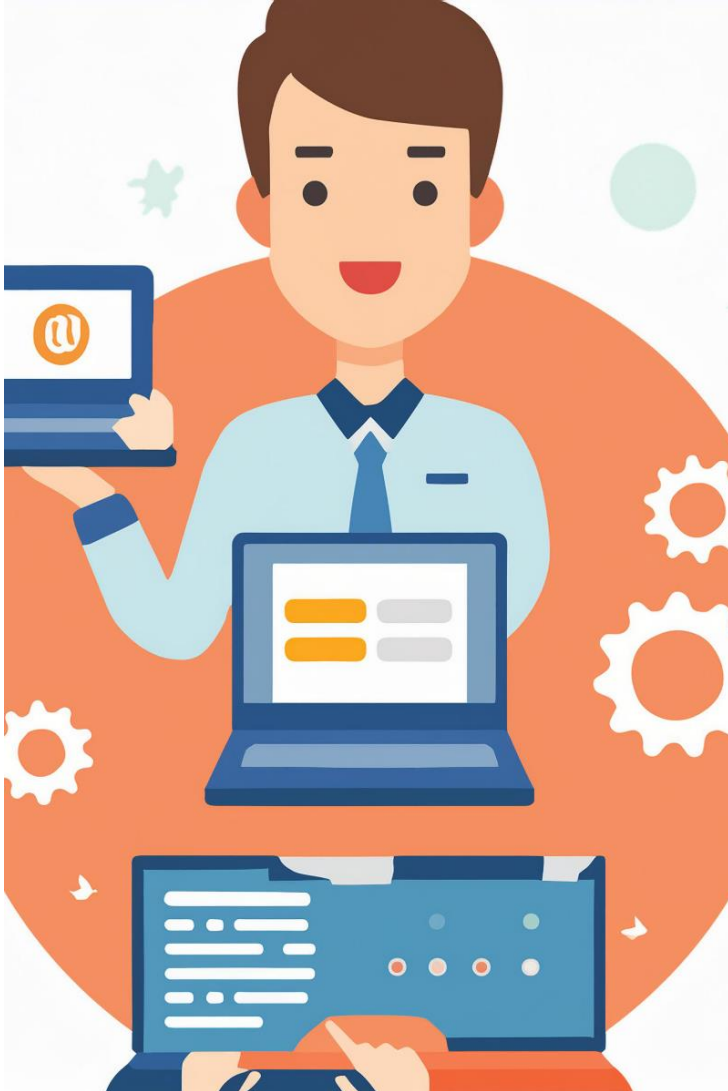


BRIEF DETOUR INTO POWERSHELL



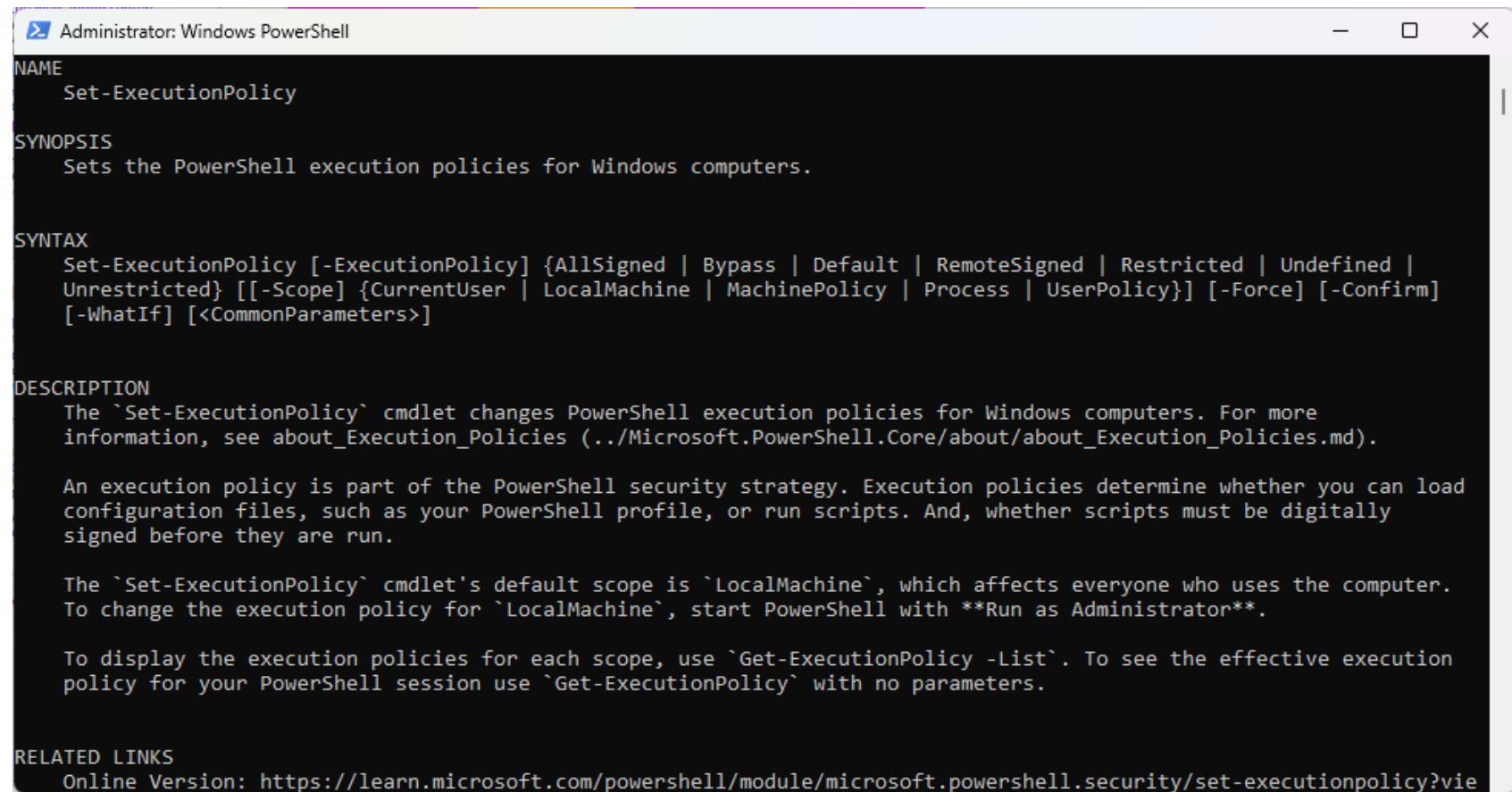
- As you get further into M365 administration, you will discover that some tasks cannot be accomplished through the web admin centers.
 - For such tasks, knowing some PowerShell will be the key.
 - For more complex tasks (like user imports, bulk license assignments, etc.), PowerShell makes it easy.
- Don't know PowerShell?
 - Fear not: we're going to perform an exercise right now!
 - We're going to verify the state of unified logging in your tenant.
- Microsoft makes available various PowerShell cmdlets to simplify our administrative activities.
 - We'll be using Exchange Online today.
 - PowerShell isn't hard – especially with Microsoft's guidance.
 - I'll walk us through it as an example. Follow along!

BRIEF DETOUR INTO POWERSHELL



- For this to work, we're going to need to adjust a handful of one-time configs.
 - We'll need to set an execution policy for our scripts
 - We'll need to get the Exchange Online cmdlets
 - We'll need to import the cmdlet module into our PowerShell session.
- Once we've done those things, we'll connect to Exchange Online
 - For additional documentation on this process, see [Connect to Exchange Online Powershell](#).
 - Assuming you've got sufficient permissions to connect and execute the cmdlet we're going to run, this should proceed relatively quickly.
 - The global admin role and/or compliance admin roles provide sufficient rights to carry out this activity.

LET'S RUN SOME PoSh!

A screenshot of a Windows PowerShell window titled "Administrator: Windows PowerShell". The window displays the help text for the "Set-ExecutionPolicy" cmdlet. The text is organized into sections: NAME, SYNOPSIS, SYNTAX, DESCRIPTION, and RELATED LINKS. The background of the PowerShell window is black with white text.

```
Administrator: Windows PowerShell

NAME
    Set-ExecutionPolicy

SYNOPSIS
    Sets the PowerShell execution policies for Windows computers.

SYNTAX
    Set-ExecutionPolicy [-ExecutionPolicy] {AllSigned | Bypass | Default | RemoteSigned | Restricted | Undefined |
    Unrestricted} [[-Scope] {CurrentUser | LocalMachine | MachinePolicy | Process | UserPolicy}] [-Force] [-Confirm]
    [-WhatIf] [<CommonParameters>]

DESCRIPTION
    The `Set-ExecutionPolicy` cmdlet changes PowerShell execution policies for Windows computers. For more
    information, see about_Execution_Policies (../Microsoft.PowerShell.Core/about/about_Execution_Policies.md).

    An execution policy is part of the PowerShell security strategy. Execution policies determine whether you can load
    configuration files, such as your PowerShell profile, or run scripts. And, whether scripts must be digitally
    signed before they are run.

    The `Set-ExecutionPolicy` cmdlet's default scope is `LocalMachine`, which affects everyone who uses the computer.
    To change the execution policy for `LocalMachine`, start PowerShell with **Run as Administrator**.

    To display the execution policies for each scope, use `Get-ExecutionPolicy -List`. To see the effective execution
    policy for your PowerShell session use `Get-ExecutionPolicy` with no parameters.

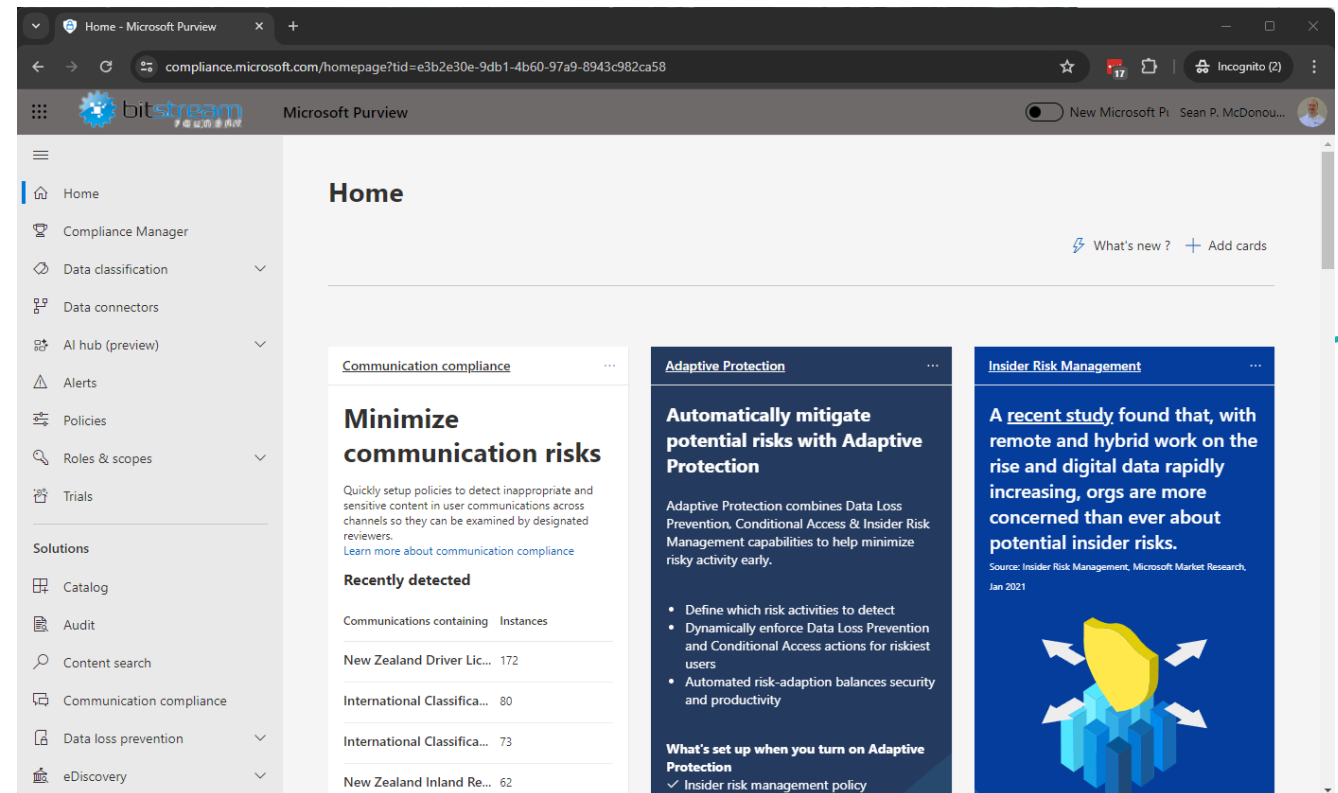
RELATED LINKS
    Online Version: https://learn.microsoft.com/powershell/module/microsoft.powershell.security/set-executionpolicy?vie
```


UNIFIED LOGGING (CONTINUED)

- **Where do I find access to unified logging and results?**
 - Microsoft Compliance Center or Microsoft Purview.
 - If you don't have Purview, you will have a Compliance admin center. For all intents and purposes, they're the same thing.
- **What can I do with the data being collected?**
 - Get an objected rating of how compliant my tenant and its settings are (0 – 100%).
 - Determine if you data loss prevention (DLP) policies are effectively.
 - Launch an eDiscovery inquiry
 - If you suspect inappropriate use or actions taken on sensitive content, you can use the Audit capability to search your content and actions taken on it with very granular control.
 - Many more, depending on your licensing.



EXPLORE M365'S COMPLIANCE ADMIN CENTER



WHAT ABOUT THIS “ENTRA STUFF?”



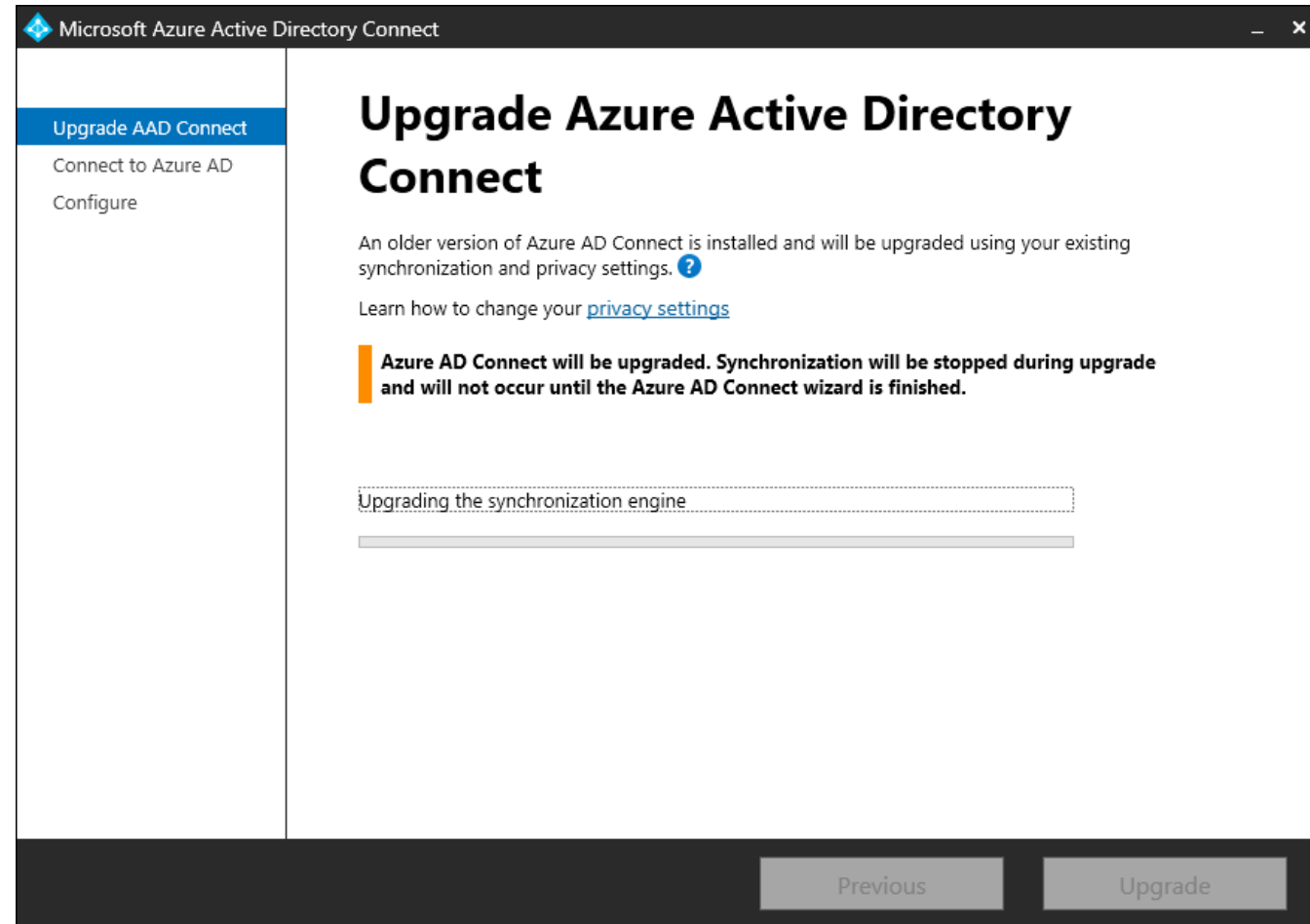
- **Entra ID is the 800-pound gorilla in the room**
 - It is what was formerly known as Azure Active Directory (AAD)
- **Why did Microsoft change the name from AAD?**
 - I’ve been wondering that very same thing since the name change. It will always be AAD to me.
 - Many long-time admins still refer to Entra ID as AAD.
- **What is Entra ID’s purpose?**
 - It functions in the cloud as Active Directory does on-premises.
 - Handles user profile data, authentication (AuthN), and more.
- **Who gets Entra ID?**
 - You get Entra ID with your M365 tenant, and your M365 tenant works with it much like on-premises Active Directory.
 - Entra ID supports basic activities, profiles, and access control.
 - There are also Entra ID admin roles, as well.

ESTABLISHING YOUR TENANT

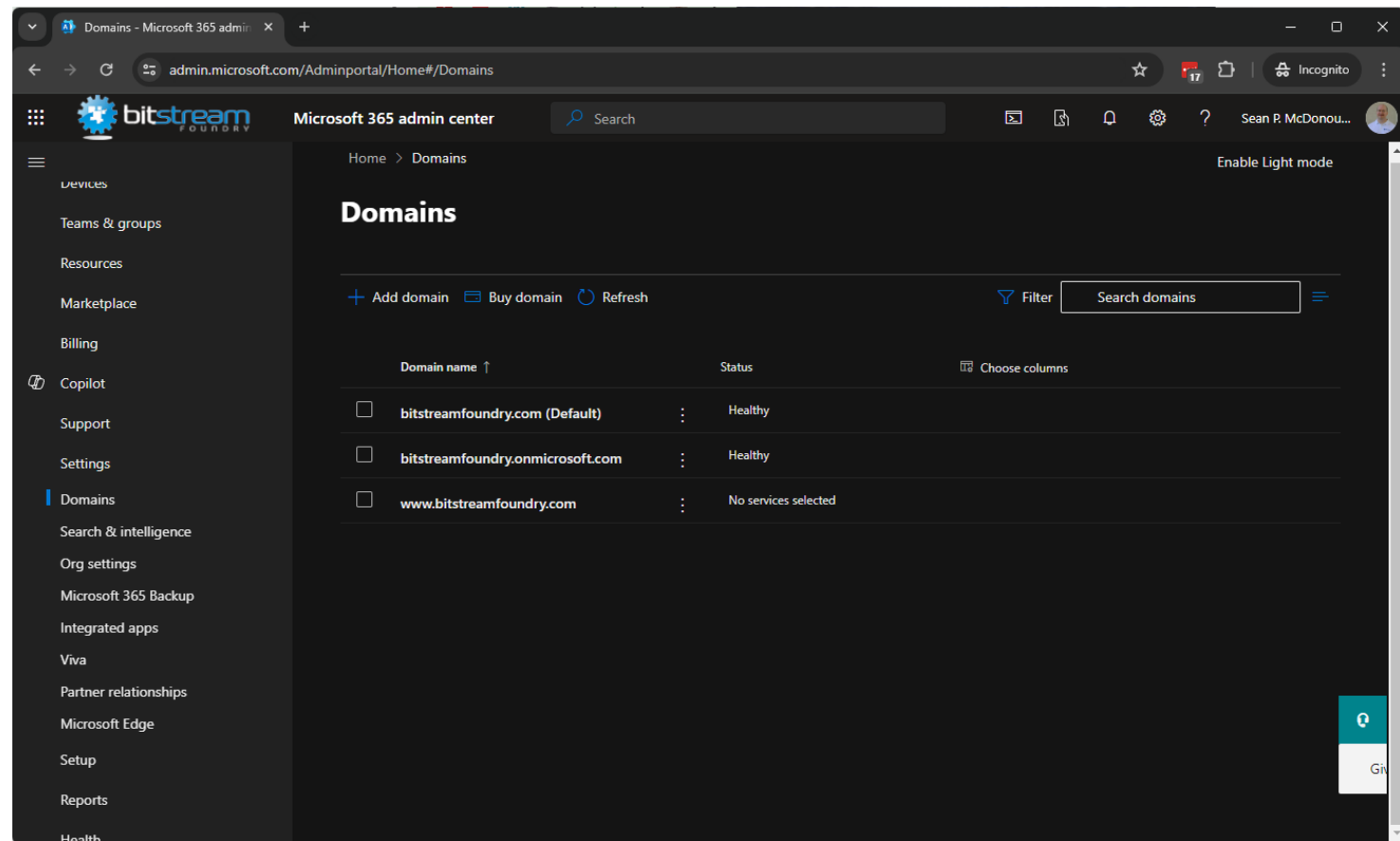
- If you're starting from scratch, there are probably some things that are on your checklist.
 - You might be synchronizing your tenant with an on-premises Active Directory domain.
 - If so, you'll want to download [Entra ID Connect](#) (formerly Azure Active Directory Connect), install, and configure it.
- If you have a custom/vanity domain, you may want to configure it for use by your tenant.
 - Microsoft has [great instructions for how to do this](#).
 - It's relatively easy to do, but it will require some knowledge of the domain name service (DNS) protocol and records.
- You may want to do an initial sync of users.
- You'll want to define who can act in admin roles.



ENTRA ID CONNECT V2



ADDING A CUSTOM DOMAIN NAME



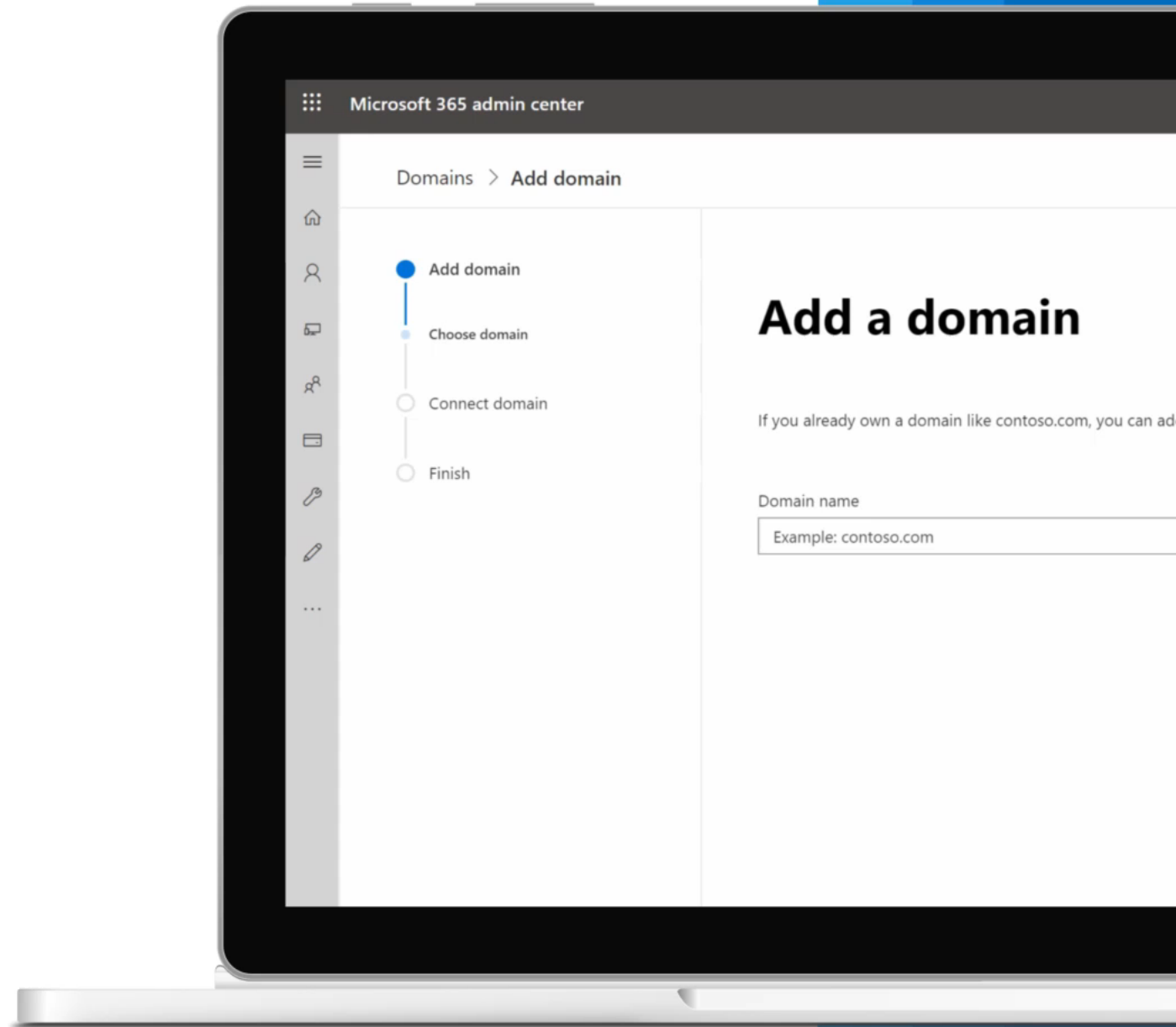
SOME NOTES ABOUT ADDING DOMAINS



- **Custom domain name aren't required**
 - If you plan to use them, though, set them up and add them before getting too far into configuration.
 - Make sure to add custom domains before adding users to avoid unnecessary user configuration steps.
- **When you add custom domain(s), you'll have to decide which domain is the default.**
 - This affects things sign-in options and user email addresses.
 - No custom domain means all users are accessible only through the `<TenantName>.onmicrosoft.com` namespace.
- **Microsoft has partnered with domain providers to simplify much of DNS record setup process.**
 - The specifics of your DNS setup will drive steps needed to undertaken manually or with assistance.
 - See [Plan the DNS record requirement for a custom domain.](#)

Microsoft 365

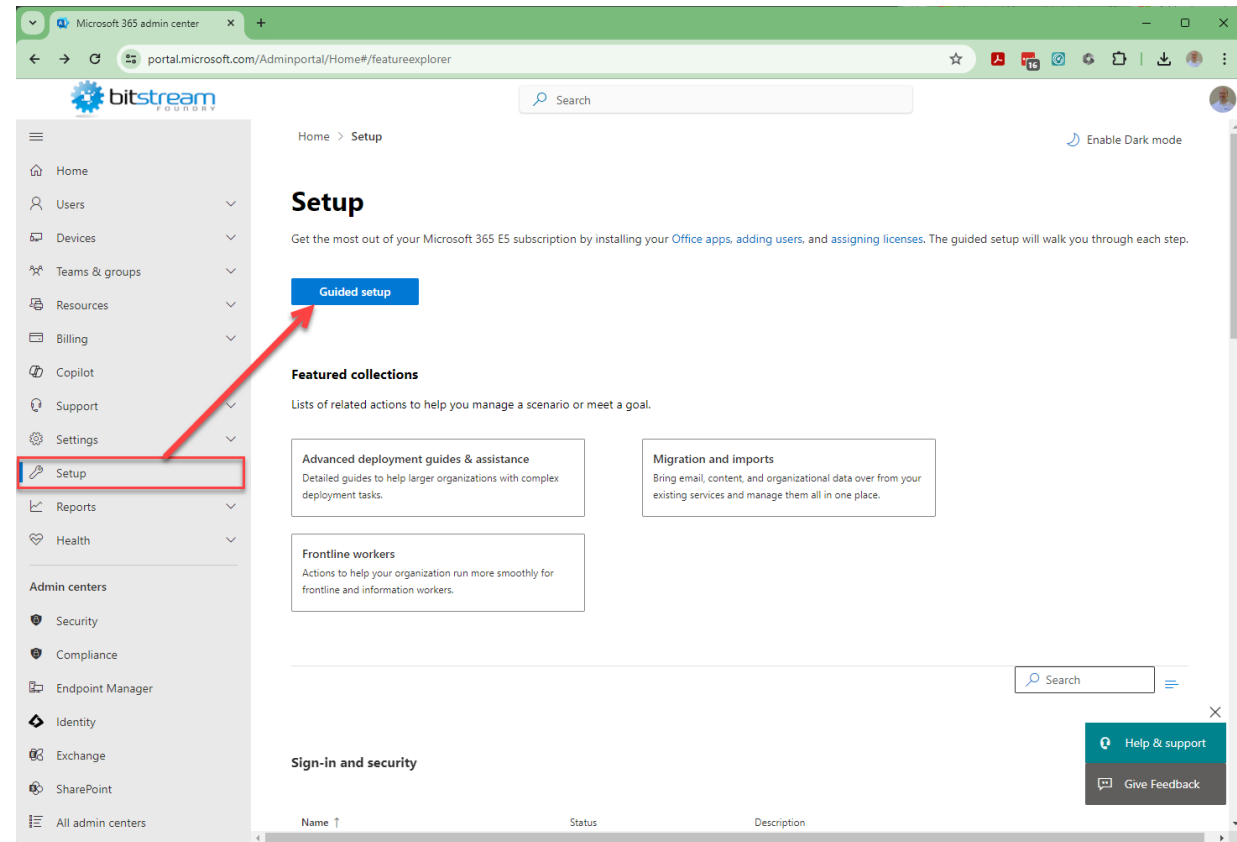
Add a domain



NEED ADDITIONAL HELP? GET A GUIDE

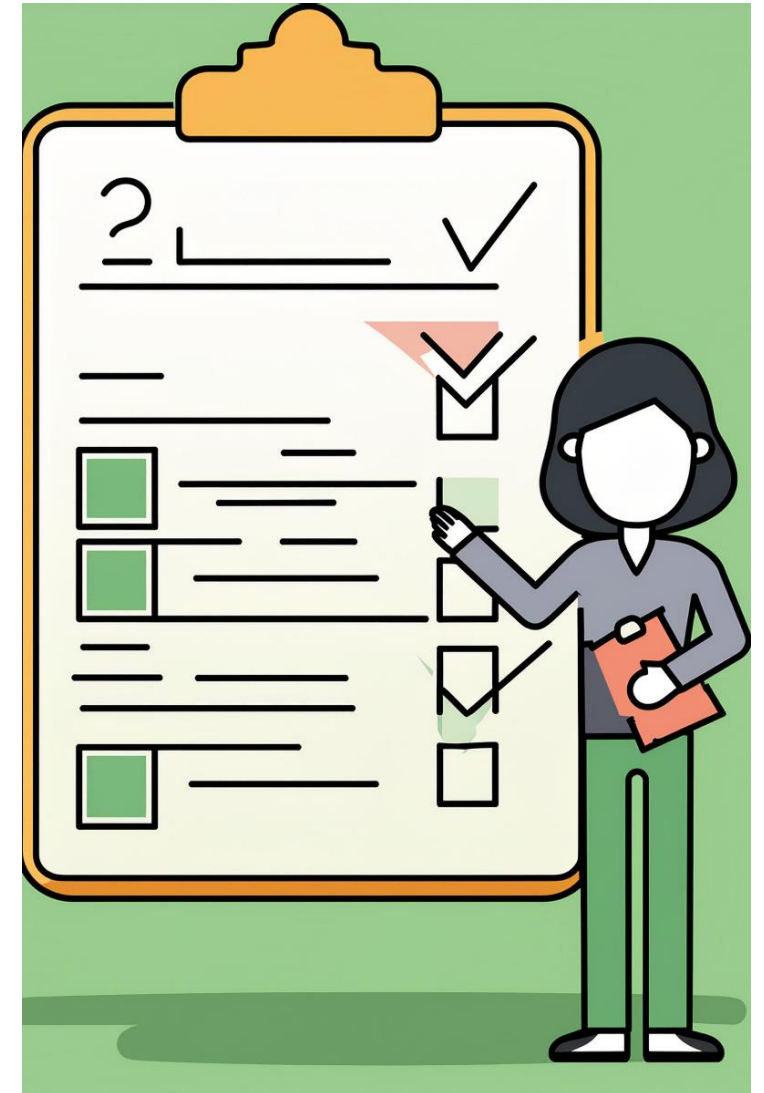


- **M365 tenants have a guided setup option.**
 - Just go to “Setup” in the navigation pane on the left.
 - Select the “Guided Setup” button for wizards to guide you.



SUMMING-UP TENANT CONFIGURATION

- Microsoft recommends that M365 admins assemble a checklist of tasks needed to get their organization established in M365.
- The checklist is unique to your organization, but common tasks include:
 - Move all users over to Microsoft 365.
 - Verify all users have a functional mailbox and migrate their data to their account.
 - Create all required system resources.
 - Establish and assign all permissions.
 - Move the vanity domain(s).
 - Enroll all Windows 10 and 11 devices to Intune.
 - Establish co-management with Intune if the company has Microsoft Endpoint Configuration Manager.
 - Establish proper governance policies for mobile devices.
 - Update and publish DNS records globally.
 - Configure the connector if Microsoft Entra Connect Sync is in place.
 - Configure multifactor authentication when an organization employs it.
 - Protect inbound and outbound mail flow with mailing policies.
 - Configure the Organizational profile with the correct information.



WHAT IF THERE ARE PROBLEMS?



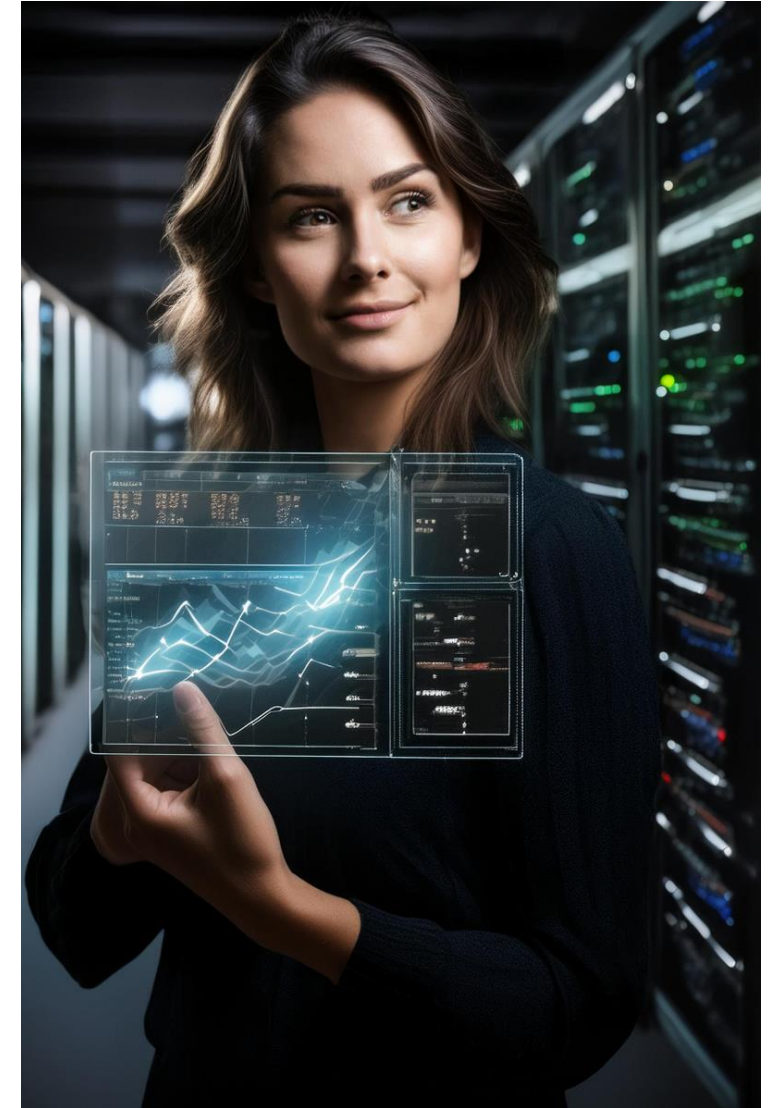
DEALING WITH PROBLEMS



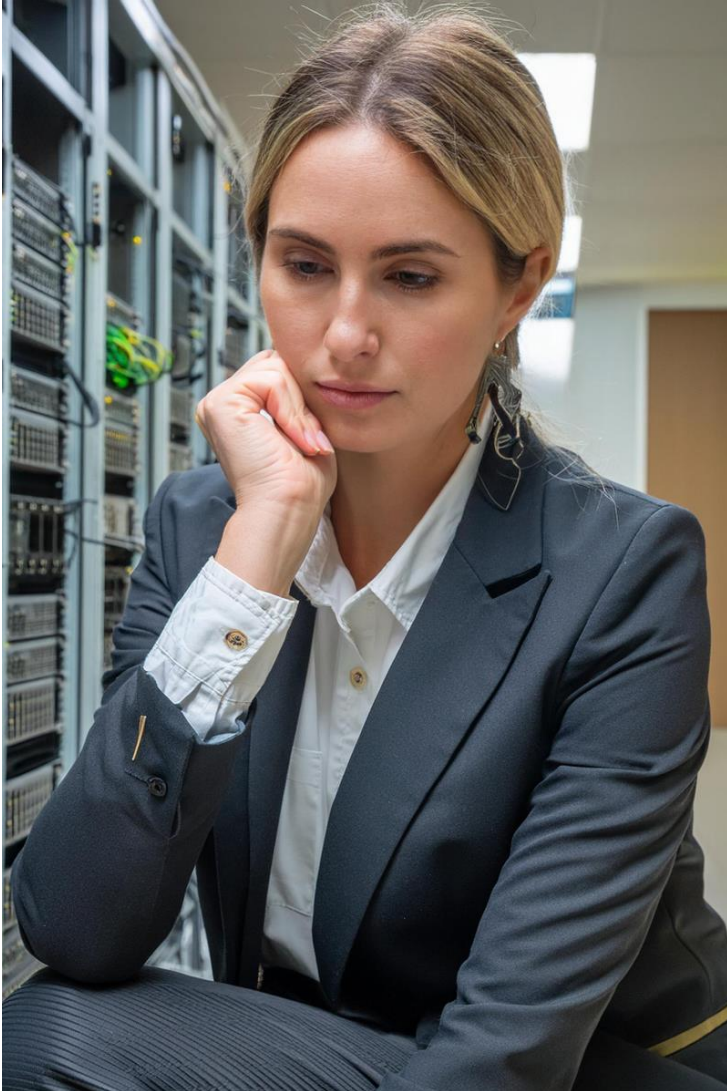
- If we're being honest, it's not about "if" there are going to be problems but "when" they will occur.
 - For new administrators who are used to on-premises access to their servers, this is initially difficult to swallow.
 - In M365, you don't have access to the servers running your organization's tenant(s).
- Does this mean you don't have control.
 - For all practical purposes, yes.
 - It doesn't mean you're left in the dark until things are once again working.
- When M365 first entered the cloud landscape, it was difficult to understand what was happening at any given moment.
 - Microsoft responded to admin concerns with a few changes.

DEALING WITH PROBLEMS

- Microsoft knows that service outages cause acid indigestion for administrators.
 - Previously, there was no systematic approach to communicating issues, what was affected, or when you'd receive an update. Everything was ad-hoc.
 - Microsoft fixed the situation, and it is now very easy to [check your M365 service health](#).
- Issues and their statuses are now readily relayed – as well as what's being done.
 - Includes detail of what's potentially affected
 - Also, Microsoft reports as much of the “why” as it knows.
 - Bonus: they'll let admins know when the next update will be given.
 - It's also possible to review issue history.
 - Pro-active alerts can also be established.

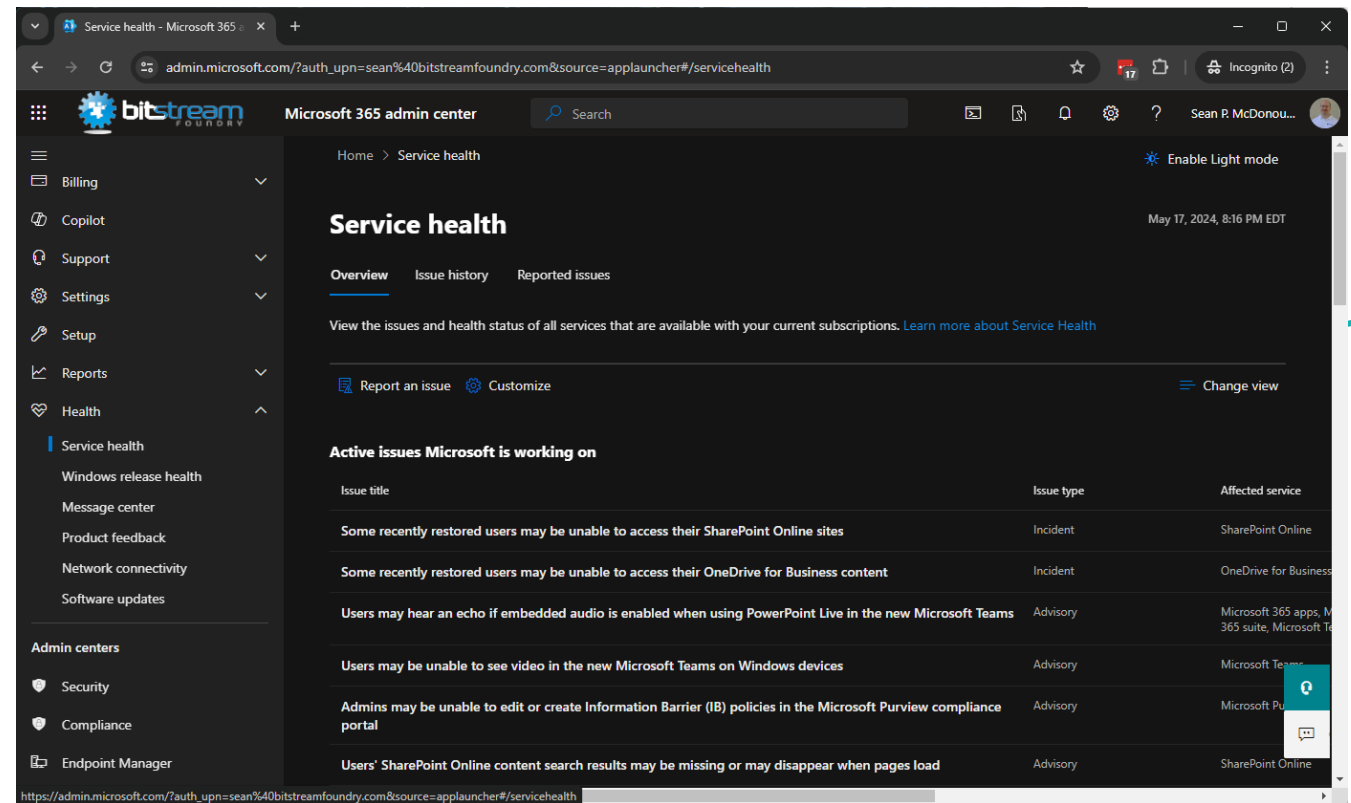


I CAN'T FIND INFO ON MY PROBLEM



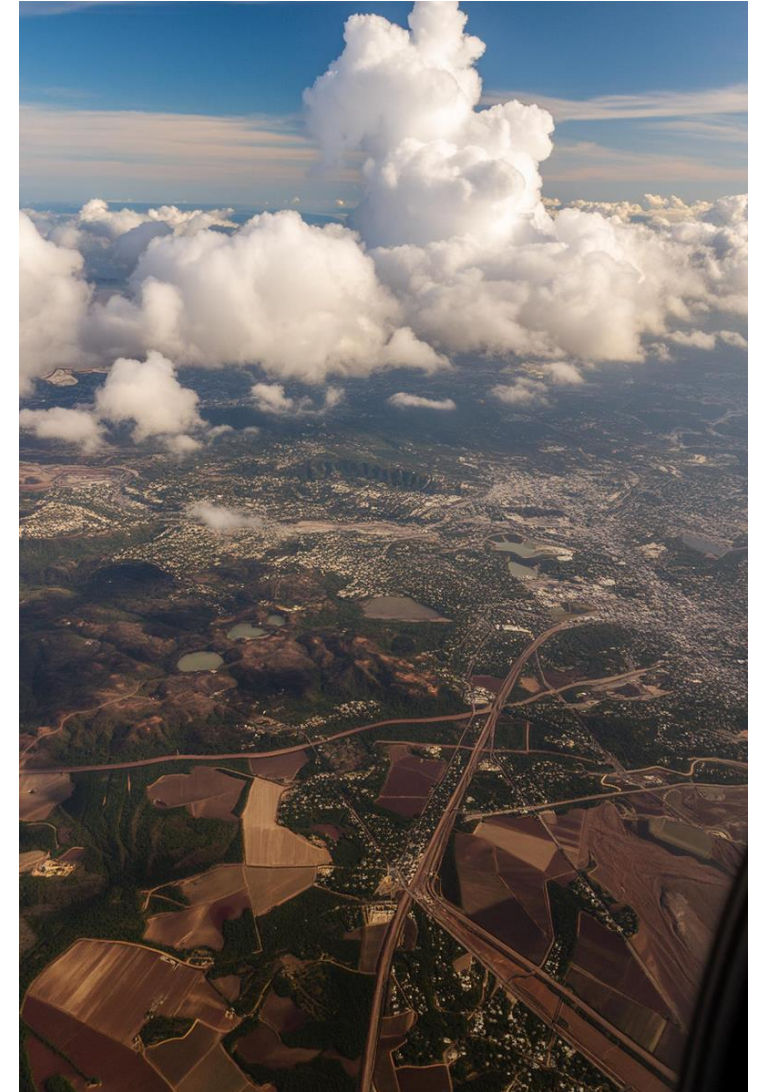
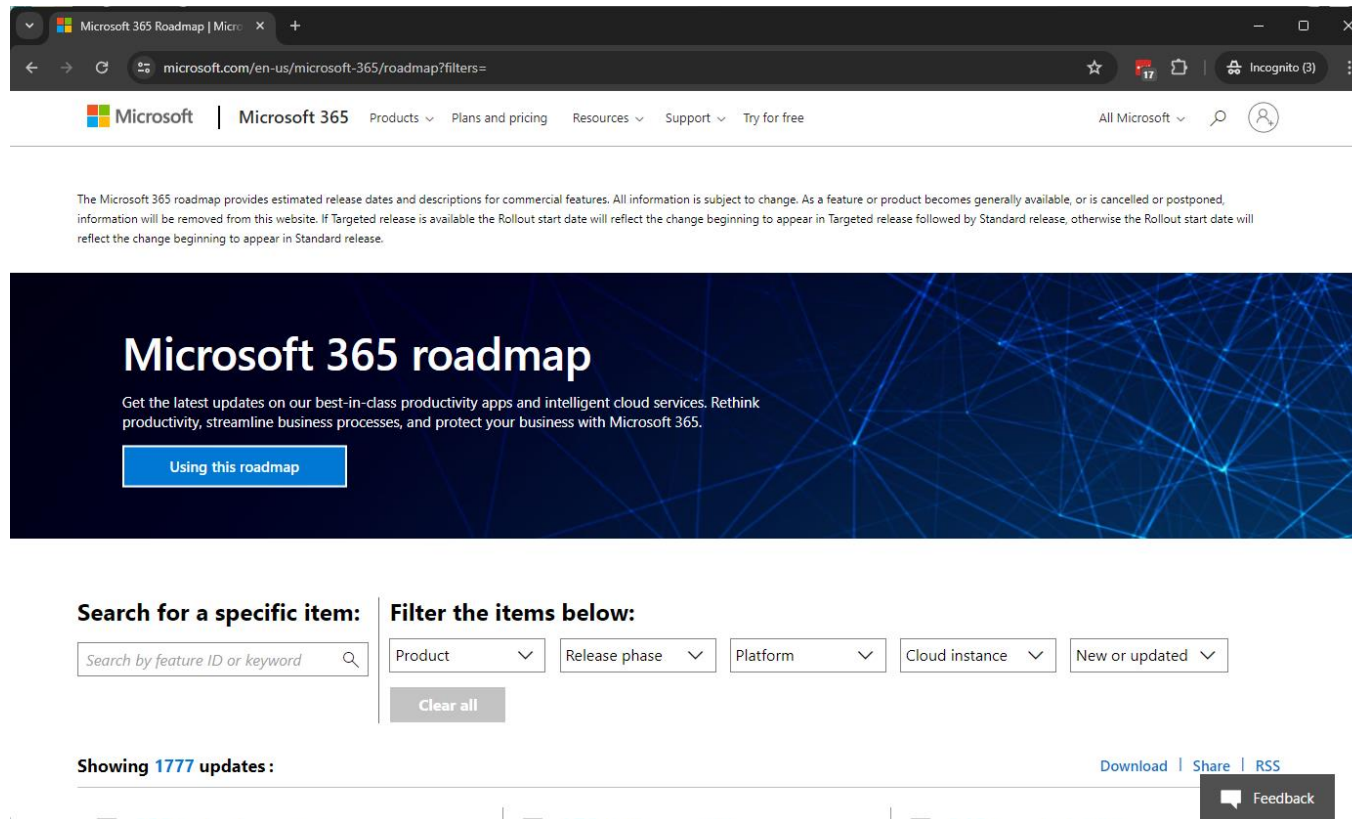
- If you have searched for information on problems that have been reported to you and don't find anything, don't panic.
 - It may have not yet been reported or discovered by Microsoft.
 - The good news is that there's a very straightforward and easy way to report issues through Service Health Tool.
 - It takes minimal time and effort.
- The Service Health Tool has been extended to cover more than just M365
 - Info on Windows releases and patches
 - Network connectivity tool analyzes and reports potential fixes and/or improvements.
 - For more detail, see [Network connectivity in the Microsoft 365 Admin Center](#).

A TOUR OF SERVICE HEALTH AND RELATED TOOLS



WANT THE 30,000 FOOT PICTURE?

- Not strictly a cloud admin necessity, but nevertheless a very useful tool.
- [Microsoft 365 roadmap](#) (also has an RSS feed!)



USERS AND GUESTS

A decorative teal line graphic in the bottom right corner, consisting of a curved line that extends from the right edge and curves downwards and to the left.

SO WHY TALK ABOUT USERS NOW?

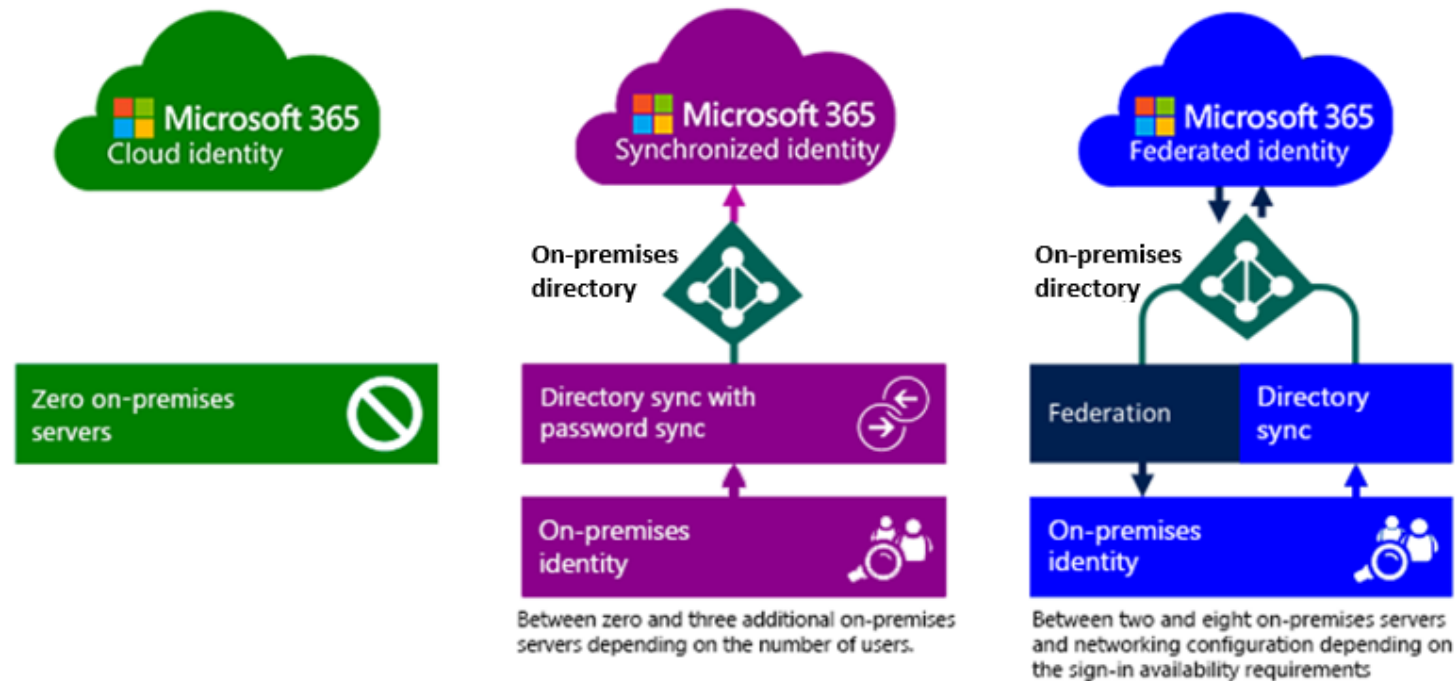


- Haven't we already (sort of) discussed this?
 - We did, but it was in the context of introducing user licensing.
 - We also talked about Entra ID Connect a bit.
- There are bigger questions we need to have answered before we will want to move forward.
 - The biggest decision point has lasting ramifications for your users and your tenant.
 - One big decision involves the identity model you want to employ. We'll be talking about this more.
- The choice of identity model typically impacts much of the rest of tenant setup.
 - Identity models have different strengths and weaknesses.
 - It's not a decision you'll want to make lightly.

M365 IDENTITY MODELS

- When it comes to identity models, you have basically three choices:

Microsoft 365 Identity Models



M365 IDENTITY MODELS (CONTINUED)

- Each model's strengths and relative weaknesses vary.

	Cloud Identity	Synchronized Identity	Federated Identity
Definition	User account only exists in Microsoft 365.	User account exists in local Active Directory and an identical user in exists in Microsoft 365.	Synchronized user account authenticated by using AD FS.
Best for...	Small to medium-sized organizations or organizations that don't need a local Active Directory Domain Service (AD DS) anymore.	Organizations running on-premises Active Directory already and are planning to move to the cloud.	Organizations that want to centralize their authentication and authorization processes. Organizations that run a federated authentication system, or require a special type of sign-in, such as with an ID card, also use this model.
Greatest benefit	Simple to use; no extra tools required.	Same Sign-In, and where organizations must manage identities in only one place.	Single sign-on, and where organizations must manage identities in only one place.

- Implementation complexity increases as you move from left to right.

M365 IDENTITY MODELS (CONTINUED)

- If you have an established corporate directory structure (e.g., Active Directory) and want to keep it, part of the decision is already made for you.
 - This tends to be the case with organizations I work with.
 - Depending on the complexity of the directory service, either synchronized identity or federated identity are given.
- The “happy middle ground” tends to be synchronized identity.
 - Entra ID ends up doing the authenticating (AuthN) and profile storage.
 - We’ve already talked about Entra ID connect; this is where it comes into play.
- If you have a 3rd party identity provider, you’re looking at federated identity.

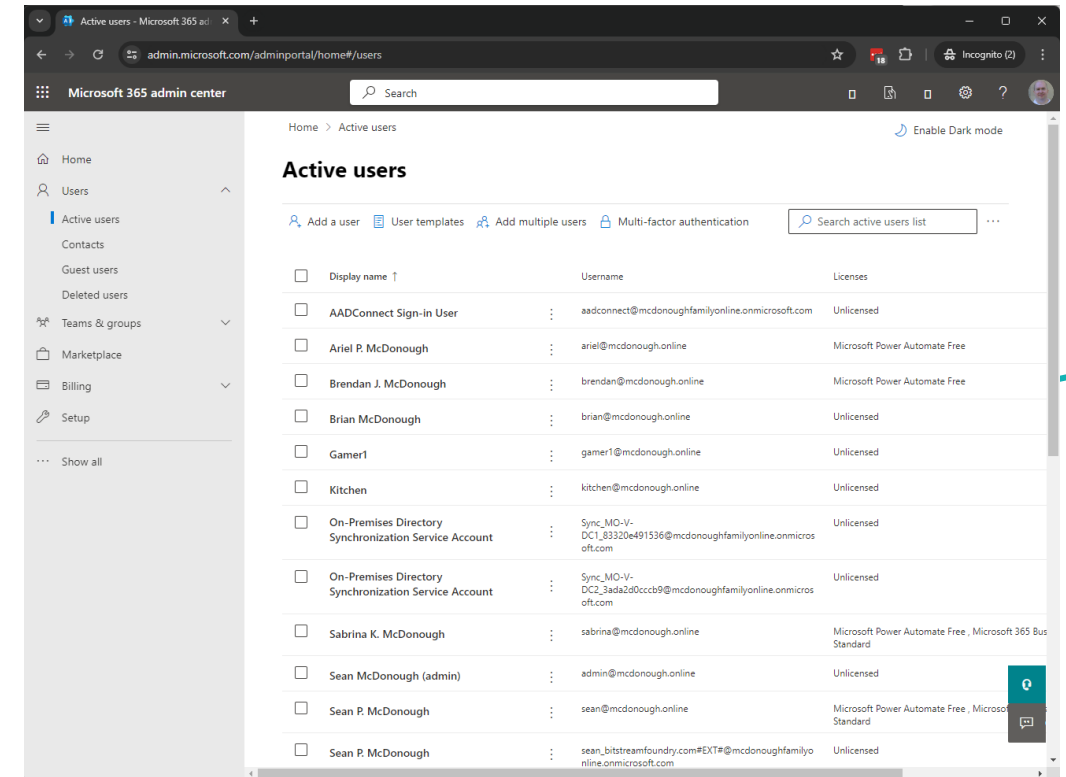


A BIT ABOUT AUTHORITATIVE SOURCES



- When it comes to identity providers, not all “sources of truth” are the same.
 - When employing an M365 cloud identity model, things are relatively clear – the cloud is the only source of truth.
- What about **synchronized or federated identity models**?
 - Cloud identities can exist alongside synchronized and/or federated identities.
 - A cloud-created identity will typically not propagate back on-prem, but on-prem identities will be added to Entra ID by default (exceptions exist).
 - This makes your identity provider (AD on prem or your federated IdP) the source of truth.
 - Operations need to originate in the “true” source systems to be reflected in the cloud.

SYNCHRONIZING ACCOUNTS EXAMPLE



Home > Active users

Enable Dark mode

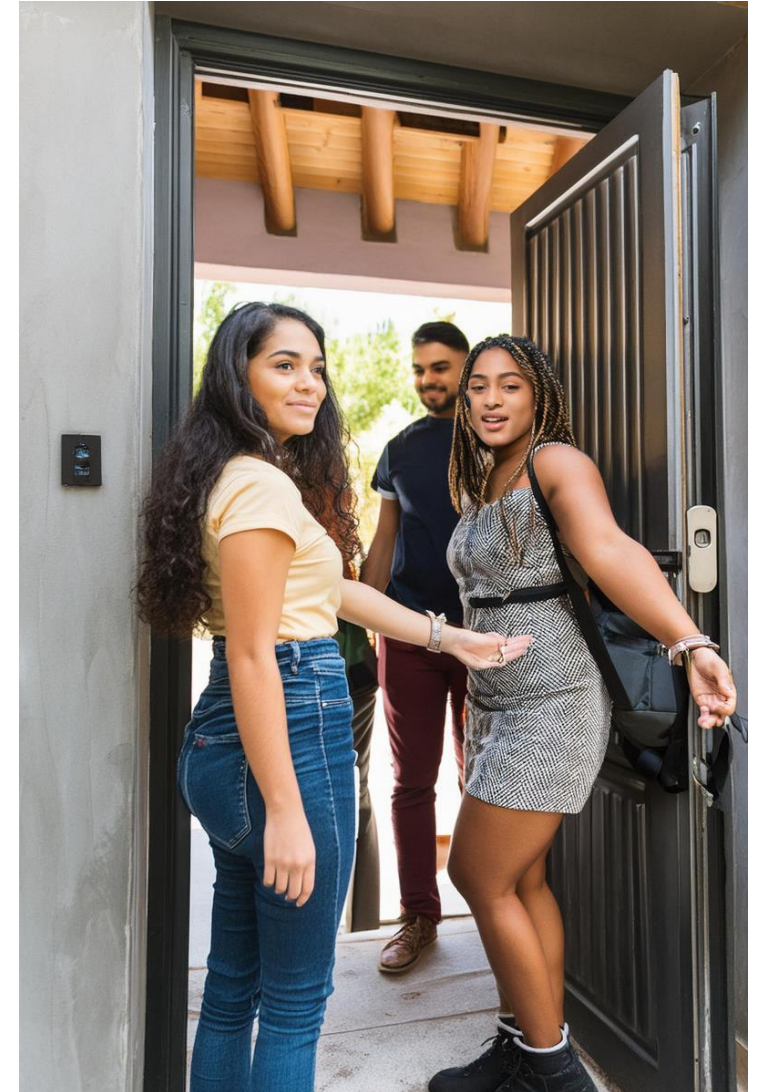
Active users

[Add a user](#)
[User templates](#)
[Add multiple users](#)
[Multi-factor authentication](#)

<input type="checkbox"/>	Display name ↑	Username	Licenses
<input type="checkbox"/>	AADConnect Sign-in User	aadconnect@mcdonoughfamilyonline.onmicrosoft.com	Unlicensed
<input type="checkbox"/>	Ariel P. McDonough	ariel@mcdonough.online	Microsoft Power Automate Free
<input type="checkbox"/>	Brendan J. McDonough	brendan@mcdonough.online	Microsoft Power Automate Free
<input type="checkbox"/>	Brian McDonough	brian@mcdonough.online	Unlicensed
<input type="checkbox"/>	Gamer1	gamer1@mcdonough.online	Unlicensed
<input type="checkbox"/>	Kitchen	kitchen@mcdonough.online	Unlicensed
<input type="checkbox"/>	On-Premises Directory Synchronization Service Account	Sync_MO-V-DC1_83320e491536@mcdonoughfamilyonline.onmicrosoft.com	Unlicensed
<input type="checkbox"/>	On-Premises Directory Synchronization Service Account	Sync_MO-V-DC1_3ada2a20cccb9@mcdonoughfamilyonline.onmicrosoft.com	Unlicensed
<input type="checkbox"/>	Sabrina K. McDonough	sabrina@mcdonough.online	Microsoft Power Automate Free, Microsoft 365 Business Standard
<input type="checkbox"/>	Sean McDonough (admin)	admin@mcdonough.online	Unlicensed
<input type="checkbox"/>	Sean P. McDonough	sean@mcdonough.online	Microsoft Power Automate Free, Microsoft 365 Business Standard
<input type="checkbox"/>	Sean P. McDonough	sean_bitstreamfoundry.com#EXT#@mcdonoughfamilyonline.onmicrosoft.com	Unlicensed

WHAT ABOUT GUESTS?

- A common scenario with M365 tenants involves collaboration with others outside of your organization and tenant.
 - This is a fully supported scenario with different options depending on the details of the scenario.
 - All options are not equal, though, and have inherit strengths and weaknesses.
- Microsoft details the creation and/or management of guest users [here](#).
 - The most common scenario is to establish an outside identity (i.e., not a user in your tenant) as a guess user.
 - Appropriate controls are provided for many workloads.
 - Guest users are clearly identified by the presence of a #EXT# at the end of their user principal name (UPN)
 - Guests overwhelmingly have a user type of Guest.



A QUICK LOOK AT GUEST ACCOUNTS

The screenshot displays the Microsoft 365 admin center for the organization 'Bitstream Foundry, LLC'. The left sidebar contains navigation links for Home, Users, Devices, Teams & groups, Resources, Marketplace, Billing, Copilot, Support, Settings, Setup, Reports, and Health. Below these are 'Admin centers' for Security, Compliance, Endpoint Manager, Identity, Exchange, and SharePoint.

The main content area shows a 'Simplified view' with options to 'Add a user', 'Edit a user', 'Reset password', and 'Block a user'. A greeting for 'Sean P. McDonough' is displayed. Below this, there are two promotional cards: 'Connect with more customers' and 'Install or share the latest Microsoft 365 apps'.

The 'Your organization' section is active, showing tabs for 'Users', 'Teams', 'Subscriptions', and 'Learn'. It includes a description: 'Manage who can access apps and services included in your Microsoft 365 subscriptions. Add or remove users, manage licenses, and reset passwords.' Below this is a '+ Add user' button and a 'Reset password' link, along with a search bar for the users list.

A table lists the current users:

Name	Username for sign-in	Licenses
A Admin	admin@bitstreamfoundry.com	Unlicensed
B Bitstream Foundry Applicat...	bitstreamfoundryapp@bitstreamfoundry.com	Office 365 E5 without Audio Conferencing , Micros...
CB Christian Buckley	cbuck_collabtalk.com#EXT#@bitstreamfoundry.com	Unlicensed

GO BIG OR GO HOME!



- **How do I deal with the bulk import of users or any bulk operations?**
 - Some operations you can perform through the web admin center, but most of them will require ...
 - ... wait for it ...
 - PowerShell!
- **Microsoft has a really good starter reference**
 - [Perform bulk user maintenance in Microsoft Entra ID](#)
 - Touches on some of the cmdlets we used earlier, as well as additional cmdlets of interest.
- **Common scenarios I've used PowerShell in**
 - Importing users in bulk (very common scenario).
 - Assigning large numbers of licences to a group of users
 - Correcting formatting differences for profile properties.

QUESTIONS BEFORE WE BREAK FOR LUNCH?





**PLEASE BE
BACK AND
READY TO
GO AT
1:30PM PST**

WORKSHOP AGENDA: AFTERNOON

- A Brief Recap of What We've Covered
- Managing Groups in Microsoft 365
- Client Connectivity
- Purview / Compliance Portal
- Microsoft 365 Defender (Security) Portal
- Additional Admin Centers
- Wrap-up and contact info
- All Reference Materials and Links

CHECKLIST



And as in the morning, Q&A throughout!

A BRIEF HISTORY OF TIME (OR AT LEAST OUR TIME TOGETHER)



WHAT WE'VE COVERED THUS FAR

WHO WE AS CUSSES



- **What we've covered, top to bottom.**
 - We've built an understanding that "evergreen" means a service can change whenever to provider decides to.
 - We have an understanding of what RBAC is and means.
 - We've looked at M365 licensing scenarios.
 - We took a brief tour of the admin surfaces available to us.
 - We've looked at branding our M365 tenant.
 - We've briefly looked at sharing policy and controls.
 - We spent some time talking about Entra ID.
 - We talked about the usefulness of PowerShell.
 - We talked about unified logging and the Compliance Center.
 - We talked about using a custom domain name.
 - We talked about roadmap info and resources for problems.
 - We talked about user identity model options.
 - We talked about guest accounts.

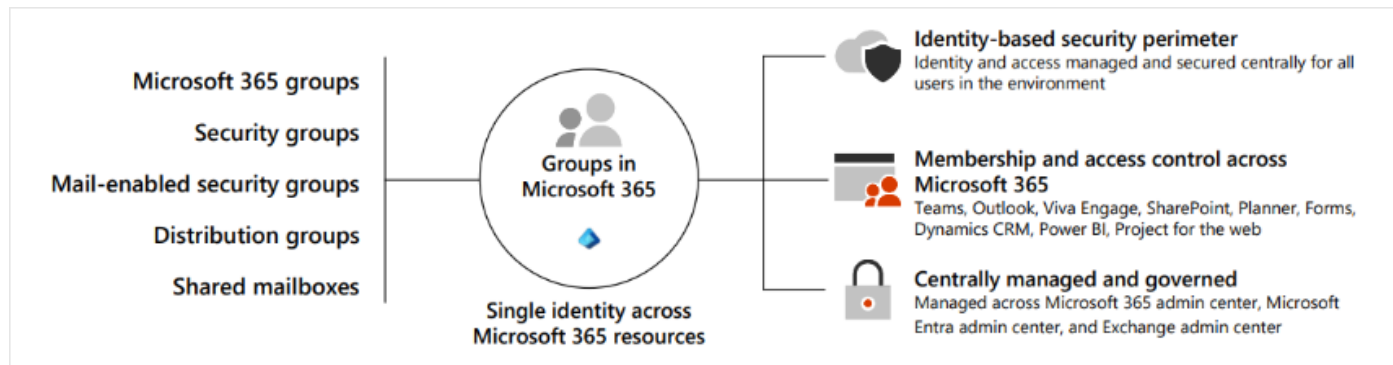
MANAGING GROUPS IN MICROSOFT 365

The screenshot displays the Microsoft 365 Admin Center interface. The left sidebar contains navigation options: Home, Users, Devices, Teams & groups (expanded), Active teams & groups (selected), Policies, Deleted groups, Shared mailboxes, Resources, Marketplace, Billing, Copilot, Support, Settings, Setup, Reports, Health, Admin centers, Security, and Compliance. The main content area is titled 'Active teams and groups' and includes links for 'About Groups', 'Using Teams And SharePoint', and 'Where to store files'. Below this, there are tabs for 'Teams & Microsoft 365 groups', 'Distribution list', and 'Security groups'. A search bar is present with the text 'Search all teams and groups'. The table below lists three items:

	Name ↑	Email	Sync status	Teams status	Membership type	Privacy	Created on
<input type="checkbox"/>	Bitstream Foundry LLC	BitstreamFoundry.LLC@bitstreamfoundry.com	☁	👤	Assigned	Private	April 30, 2024 12:00 PM
<input type="checkbox"/>	CardioLog Analytics	cardiologanalytics@bitstreamfoundry.com	☁		Assigned	Private	March 20, 2024 3:42 PM
<input type="checkbox"/>	Group for Answers in Viva Engage – DO NOT DELETE 1491490	groupforanswersin vivaengagedonotdelete1491490156@bitstreamfoundry.com	☁		Assigned	Public	September 4, 2024 4:10 AM

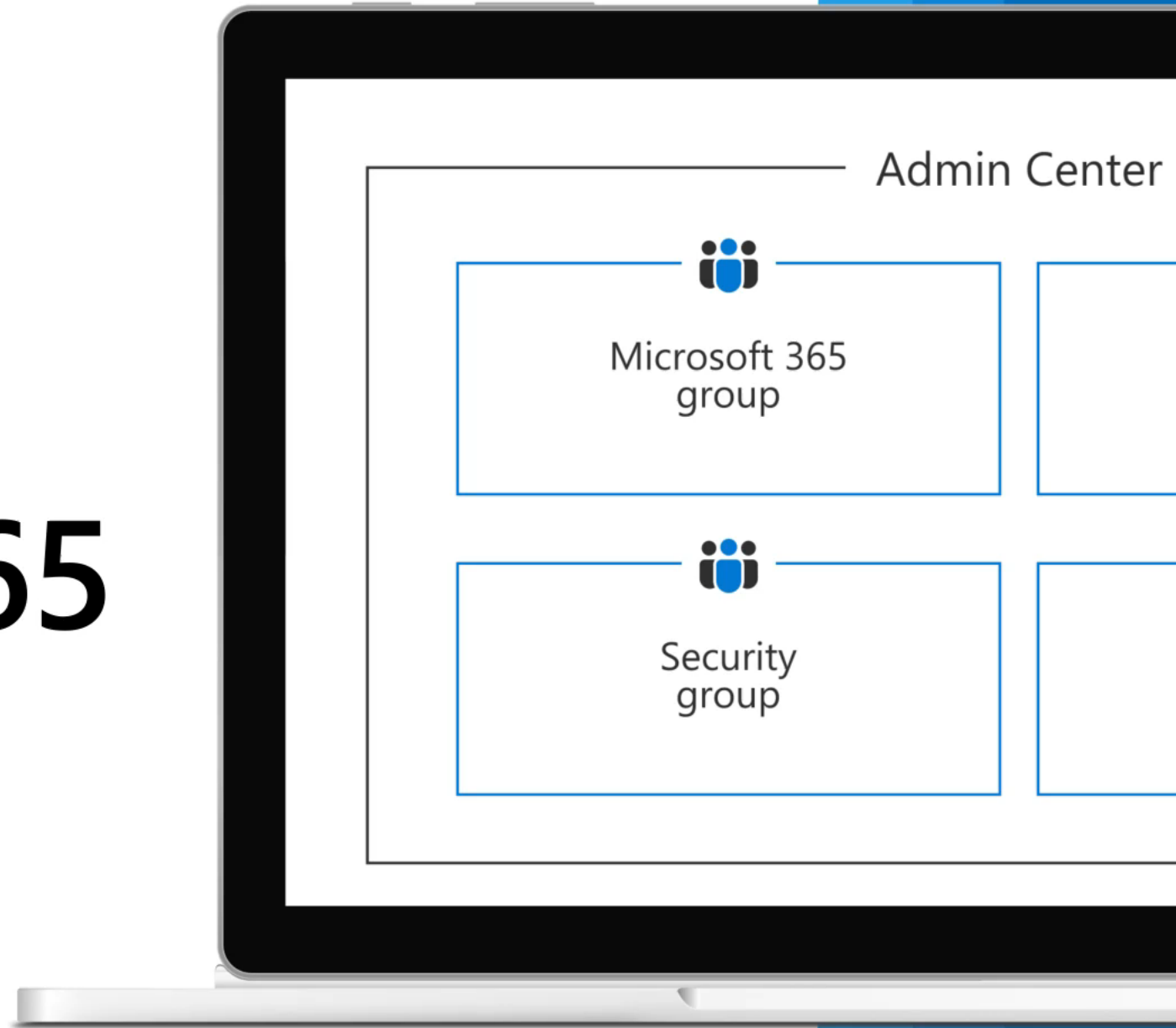
WHAT'S UP WITH GROUPS?

- As administrators, groups and their membership will be an important aspect in your daily life.
 - Many of you might already have a great deal of familiarity with Active Directory security groups and Exchange distribution lists.
- We're going to be looking at what M365 makes available to us – and where it should be used.
 - We have a much larger variety of groups to work with in M365 vs. traditional on-premises Active Directory.



Microsoft 365

Groups in Microsoft 365



GROUPS AND MORE GROUPS



- Let's look groups available to us in more detail.

Group Type	Description	When to use?	Where to create it?
Microsoft 365 group	A Microsoft 365 group is the recommended group type. It includes a group email and shared workspaces, making it ideal for collaboration. It's similar to distribution groups because it has its own mailbox, and its members receive email messages sent to the group. However, it differs from distribution groups in that it allows teams to collaborate by providing them with a shared workspace for email, conversations, files, and calendar events.	When you want to provide distribution list capabilities and other collaboration features. The best option for team work.	<ul style="list-style-type: none">- Microsoft 365 admin center- Microsoft 365 admin app- Microsoft Entra admin center- Exchange admin center- Outlook (also known as the Groups app in Outlook)
Distribution group	In Microsoft 365, a distribution group is also known as a distribution list. Organizations primarily use it for sending notifications to a group of people. You do so by associating a single email address with the distribution group. An organization's email system or mail server distributes messages sent to the group's email address to all members of the group.	When you want to distribute messages using the group only.	<ul style="list-style-type: none">- Microsoft 365 admin center- Microsoft 365 admin app- Exchange admin center

GROUPS AND MORE GROUPS (CONT.)



- Let's look groups available to us in more detail.

Group Type	Description	When to use?	Where to create it?
Mail-enabled security group	<p>When you mail-enable a security group, it means the group has an associated email address, and members of the group can send and receive emails using that address. This design enables the group to function as a mailing list or distribution group. Message delivery works the same as with a distribution group. In other words, an organization's email system or mail server distributes messages sent to the security group's email address to all members of the group.</p> <p>You can also use a mail-enabled security group to assign group permissions to various resources, such as SharePoint. For example, by adding a mail-enabled security group to SharePoint, you can grant the group's members access permissions to SharePoint sites, libraries, lists, or individual items within SharePoint. Mail-enabled security groups can't be dynamically managed, nor can they contain devices.</p>	When you want to use the group for both permissions and mail distribution.	<ul style="list-style-type: none">- Microsoft 365 admin center- Microsoft 365 admin app- Exchange admin center
Security group	A security group provides a convenient way to manage and assign permissions to multiple users simultaneously. A security group can grant access permissions to resources such as OneDrive and SharePoint.	When you only require a group to grant permissions.	<ul style="list-style-type: none">- Microsoft 365 admin center- Microsoft 365 admin app- Microsoft Entra admin center

GROUPS AND MORE GROUPS (CONT.)



- Let's look groups available to us in more detail.

Group Type	Description	When to use?	Where to create it?
Dynamic distribution group	<p>A dynamic distribution group automatically manages its membership based on predefined criteria or filters. In a traditional distribution group, users manually manage membership. In a dynamic distribution group, Microsoft 365 dynamically updates its member list based on specific attributes or conditions.</p> <p>You create and manage dynamic distribution groups in Exchange Online. With Exchange Online, administrators can define the criteria or rules for dynamic distribution groups using PowerShell or the Exchange admin center. They can base these rules on user attributes such as department, location, job title, or custom attributes. Microsoft 365 automatically calculates and updates the membership of the dynamic distribution group based on these rules.</p>	When you want to have a flexible distribution list that changes membership automatically.	- Exchange admin center
Shared mailbox	Shared mailboxes are used when multiple people need access to the same mailbox, such as a company information or support email address, reception desk, or other function that might be shared by multiple people. Users with permissions to the group mailbox can send as or send on behalf of the mailbox email address if the administrator has given that user permissions to do that. This feature is useful for help and support mailboxes because users can send emails from "Contoso Support" or "Building A Reception Desk."	When multiple people need to access the same mailbox, such as a support email address.	- Microsoft 365 admin center - Microsoft 365 admin app - Microsoft Entra admin center

- For more details on end of lifecycle options, see [this link](#).

GROUPS AND SERVICES PROVISIONED

- Where a group is created also determines if additional services are provisioned for use.

Where the group is created	Services provisioned				
	Inbox and calendar	Teams	SharePoint site and OneNote notebook	Viva Engage	Planner
Microsoft Entra ID Admin created	Auto-provisioned	Not auto-provisioned, but can be added	Auto-provisioned	Not available	Auto-provisioned
Microsoft 365 admin Admin created	Auto-provisioned	Not auto-provisioned, but can be added	Auto-provisioned	Not available	Auto-provisioned
Outlook User created	Auto-provisioned	Not auto-provisioned, but can be added	Auto-provisioned	Not available	Auto-provisioned
Teams App created	Auto-provisioned, but hidden	Auto-provisioned	Auto-provisioned	Not available	Auto-provisioned
SharePoint App created	Auto-provisioned	Not auto-provisioned, but can be added	Auto-provisioned	Not available	Auto-provisioned
Planner App created	Auto-provisioned	Not auto-provisioned, but can be added	Auto-provisioned	Not available	Auto-provisioned
Viva Engage App created	Auto-provisioned, but hidden	Not auto-provisioned, but can be added	Auto-provisioned	Auto-provisioned	Auto-provisioned
Project for the web App created	Auto-provisioned	Not auto-provisioned, but can be added	Auto-provisioned	Not available	Auto-provisioned
Roadmap App created	Auto-provisioned	Not auto-provisioned, but can be added	Auto-provisioned	Not available	Auto-provisioned

Auto-provisioned Auto-provisioned, but hidden Not auto-provisioned, but can be added Not available



RECOMMENDED GROUP BEST PRACTICES

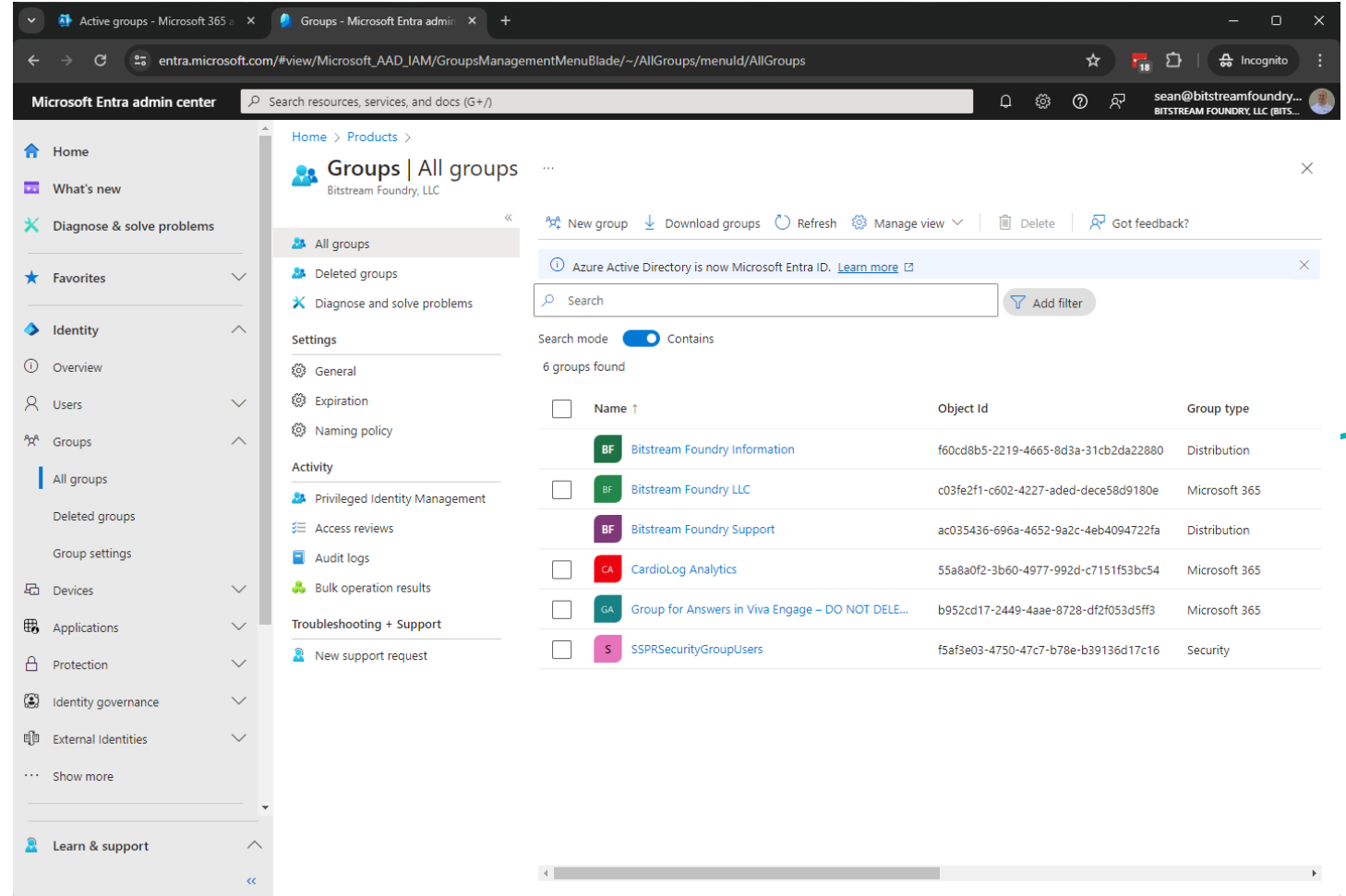


- Microsoft recommends the following when it comes to creating and maintaining groups:
 - Keep group naming conventions simple but clear.
 - Create policies and procedures for ongoing group maintenance.
 - Add users to security groups and then add those security groups to SharePoint default groups or roles rather than adding individual users to the groups or roles.
 - Maintain a consistent and well-defined account provisioning process.
 - Assign at least two owners to a group so that one can help out in the other's absence.
- It's possible to nest groups (i.e., place a group within a group), but there are some limitations. See [Create and manage groups in Microsoft 365](#).

CREATING A MICROSOFT 365 GROUP EXAMPLE

The screenshot shows the Microsoft 365 Admin Center interface in a web browser. The address bar shows the URL: `admin.microsoft.com/Adminportal/Home#/addgroupwizard/M365Group`. The page title is "Microsoft 365 admin center". The breadcrumb navigation is "Home > Active teams and groups > Add a Microsoft 365 group". The left sidebar contains a list of steps: Basics (selected), Owners, Members, Settings, and Finish. The main content area is titled "Set up the basics" and includes a description: "A Microsoft 365 group helps people collaborate. It includes an email address for contacting everyone in the group, and a SharePoint site for publishing information. To get started, fill out some basic info about the group you'd like to create." Below this, there are two input fields: "Name" with the placeholder text "New group" and "Description" with the placeholder text "Enter a description for your new group". At the bottom of the page, there are "Next" and "Cancel" buttons. A small chat icon is visible in the bottom right corner.

BUILDING A DYNAMIC GROUP (EXAMPLE)



The screenshot shows the Microsoft Entra admin center interface. The left sidebar contains navigation options: Home, What's new, Diagnose & solve problems, Favorites, Identity, Overview, Users, Groups, All groups (selected), Deleted groups, Group settings, Devices, Applications, Protection, Identity governance, External identities, Show more, and Learn & support. The main content area is titled 'Groups | All groups' for 'Bitstream Foundry, LLC'. It includes a search bar, a search mode toggle set to 'Contains', and a list of 6 groups found. The groups are displayed in a table with columns for Name, Object Id, and Group type.

Name	Object Id	Group type
Bitstream Foundry Information	f60cd8b5-2219-4665-8d3a-31cb2da22880	Distribution
Bitstream Foundry LLC	c03fe2f1-c602-4227-aded-dece58d9180e	Microsoft 365
Bitstream Foundry Support	ac035436-696a-4652-9a2c-4eb4094722fa	Distribution
CardioLog Analytics	55a8a0f2-3b60-4977-992d-c7151f53bc54	Microsoft 365
Group for Answers in Viva Engage – DO NOT DELE...	b952cd17-2449-4aae-8728-df2f053d5ff3	Microsoft 365
SSPRSecurityGroupUsers	f5af3e03-4750-47c7-b78e-b39136d17c16	Security

In the top-left corner, there are two overlapping geometric shapes: a magenta triangle pointing towards the top-right and a yellow triangle pointing towards the bottom-left.

CLIENT CONNECTIVITY

IT'S AUTOMAGICAL!

- Much of client connectivity is taken care of for us by the autodiscovery process.
 - Having said that, there are still some things you may need to do to enable it.
 - If you recall from earlier, we set up a number of DNS records that might not have made sense at the time.
 - This pertains primarily to email and the Outlook client.
- DNS records that make this possible:

DNS record	Purpose	Value to use
CNAME (Exchange Online)	The Autodiscover service configures Outlook for users.	Alias: Autodiscover Target: autodiscover.outlook.com
CNAME (Exchange federation)	The Autodiscover service configures Outlook for users in Exchange federation scenarios. This record is optional, but required when deploying Exchange in a hybrid configuration with Microsoft 365.	Alias: For example, Autodiscover.service.adatum.com Target: autodiscover.outlook.com



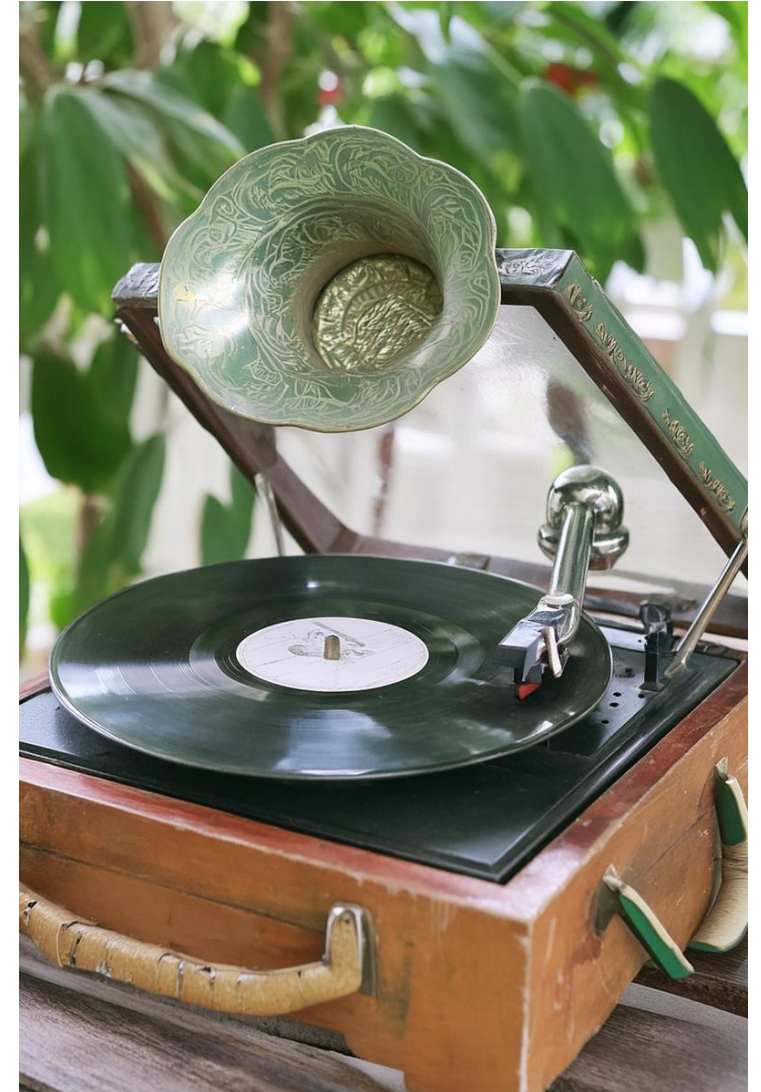
OUTLOOK CLIENTS



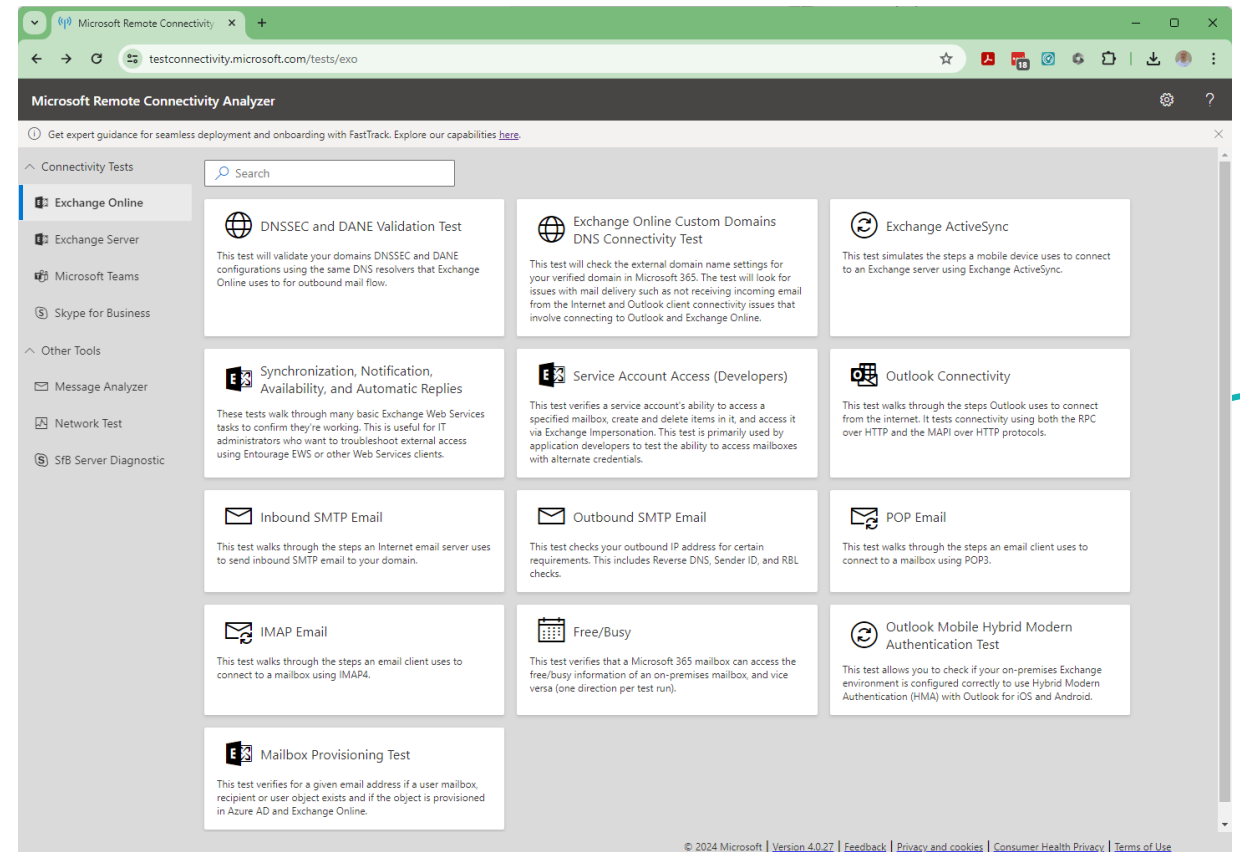
- **Microsoft extols the benefits of MAPI over HTTP.**
 - There are numerous things to like.
 - Reduced latency vs. RPC used in previous versions.
 - Improved connection handling.
 - Better security.
 - Frankly, just better in our current world.
- **Whether or not this works for your user base is completely driven by your DNS configuration.**
 - So what happens if users encounter problems or issues while setting this up?
 - You have a set of tools at your disposal that you might not even be aware of.
 - Let's introduce ...

RCA – MUSIC TO YOUR EARS

- **Meet the Microsoft Remote Connectivity Analyzer (RCA).**
 - This little Swiss Army Knife is a collection of useful diagnostic tools with a primary focus on network connectivity.
 - Contains tools to troubleshoot DNS issues, Exchange connectivity, domain-to-cloud synchronization, and much more.
 - Provides a wealth of information even if you don't have any problems.
- **The toolset is web-based, so you only need to [visit this URL](#) to get started.**
 - Even though the tool is web-based, you may be directed to download an executable to two to gain information with maximum accuracy.



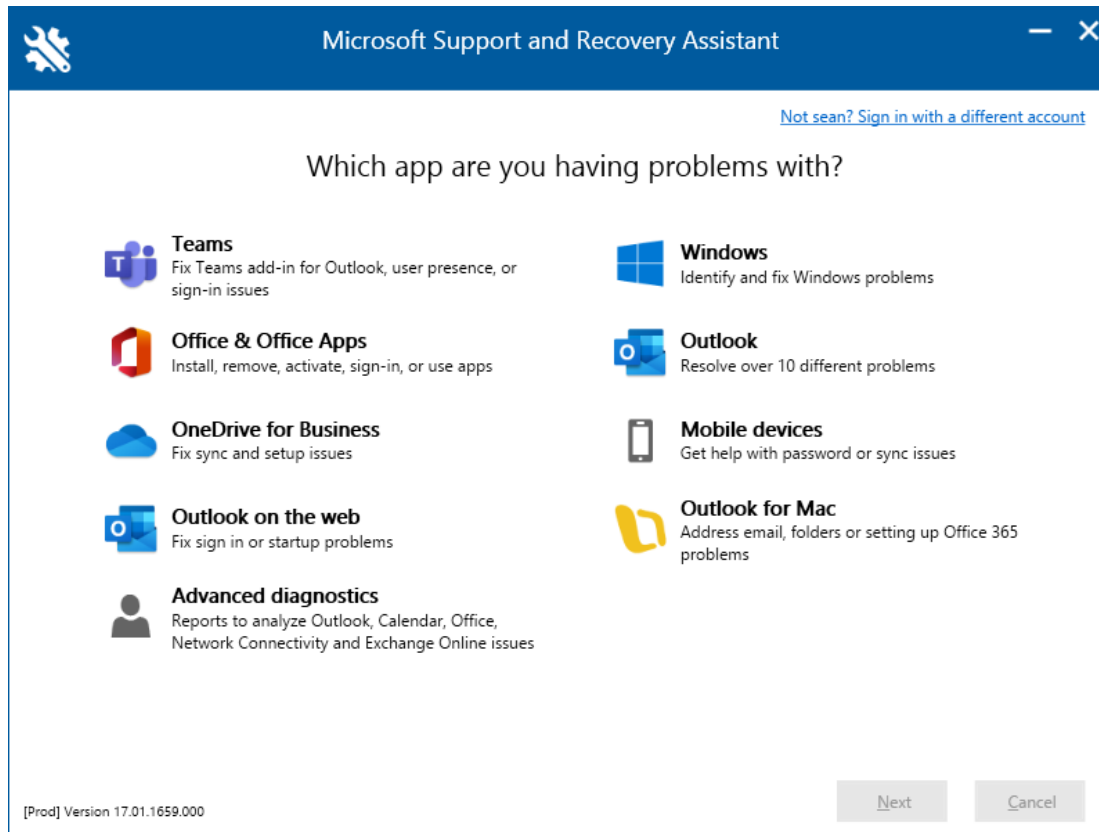
REMOTE CONNECTIVITY ANALYZER (DEMO)



BUT WAIT – THERE’S MORE!



- This is RCA’s sister with a much more pronounceable name, SARA.
 - SARA is an acronym Microsoft 365’s Support and Recovery Assistant.
 - The tool can be downloaded [here](#) and is not web-based in its execution.
- Whereas RCA’s primary area of use is with network connectivity, analysis, and configuration, SARA is different.
 - SARA might be an escalation point for problems not solved with RCA.
 - Tends to focus on the end-user parts of M365 connections.
 - Can currently fix Office, Microsoft 365, Outlook and some you might not expect (e.g., Windows).



SARA (DEMO)

WHICH TOOL SHOULD I USE?

- Given that both tools are “easy as pie” to use, I generally recommend running both.
- Microsoft identifies these as the RCA tools greatest strengths:
 - Identify connectivity issues between email clients and an organization's Exchange Server.
 - Identify connectivity issues between email clients and Microsoft 365.
 - Troubleshoot Exchange Server and Microsoft 365 deployments.
 - Identify common problems.
- Microsoft identifies RCA as tool that is typically run by clients on corporate networks.



WHICH TOOL SHOULD I USE?

- Microsoft identifies SARA as “the best solution” for the following problems (bear with me – the list is long).
- **Within Office**
 - I get an error when I install Office.
 - I can't activate Office.
 - I need to uninstall Office.
- **Within Outlook**
 - Outlook fails to start.
 - I can't set up my Microsoft 365 email in Outlook.
 - Outlook keeps asking for my password.
 - Outlook keeps saying "Trying to connect..." or "Disconnected."
 - Shared mailboxes or shared calendars don't work.



WHICH TOOL SHOULD I USE?

- **Within Outlook (continued)**
 - I'm having problems with my calendar.
 - Outlook stops responding.
 - Outlook keeps crashing.
 - I can't send, receive, or find email
- **In OneDrive for Business**
 - I can't sync my files with OneDrive.
 - I can't install OneDrive
- **In Other Office Apps**
 - I can't sign into Skype for Business.
 - I can't get email on my phone.
 - I'm having trouble opening or signing in to Outlook on the web.
 - I can't install, connect, or enable Dynamics 365 for Outlook.
 - The Teams Meeting option doesn't appear or the Teams Meeting add-in doesn't load in Outlook.

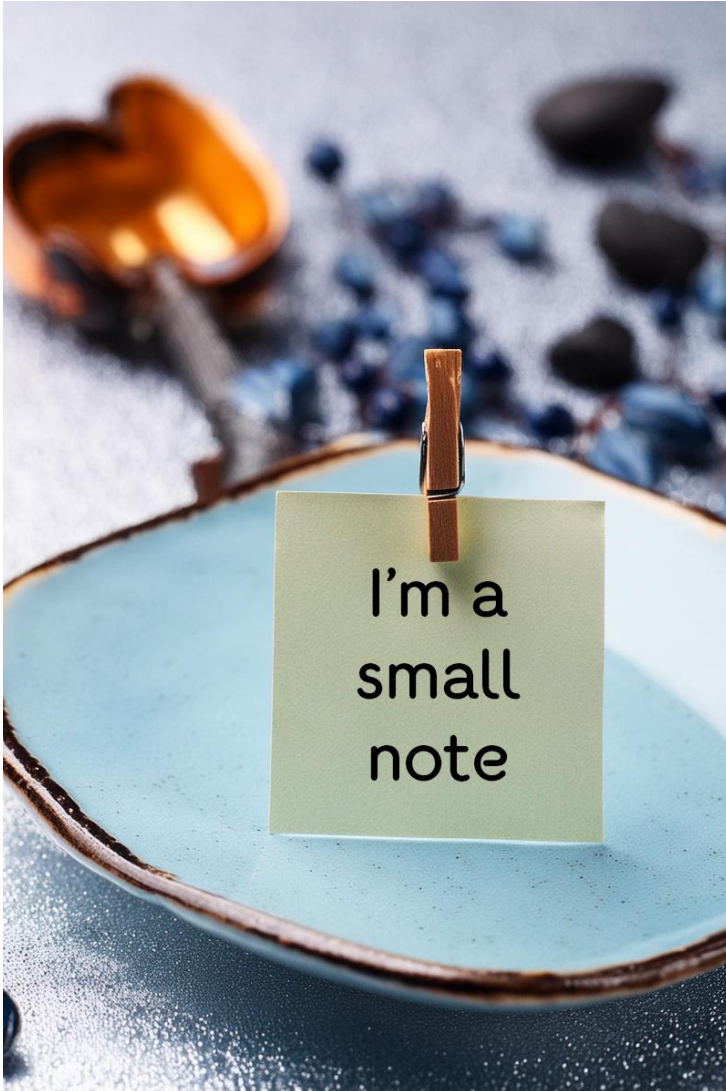


WHICH TOOL SHOULD I USE?

- **SARA also has some additional noteworthy qualities that you'll probably like.**
 - It can automatically apply fixes for known problems and scenarios, making it truly effortless.
 - It collects telemetry in a variety of scenarios that can be turned around to Microsoft Support.
 - If SARA can't fix a problem, it suggests next steps and gives you and on-ramp for Support.



ONE MORE SMALL NOTE



- If you look around the interwebs (including Microsoft.com) long enough, you may find references to Microsoft Message Analyzer.
 - Microsoft retired Message Analyzer in November of 2019.
 - Downloads have been pulled from Microsoft.com, and only those with installed before that date can still run it (with limitations).
 - Much of the feature set that was supplied by Message Analyzer now exist in the Remote Connectivity Analyzer (RCA).
- This is one of key reasons why I say that all online info has a “born on” date.
- We’ve seen this with Entra ID Connect, which was AAD Connect, which evolved from DirSync.

PURVIEW / COMPLIANCE PORTAL

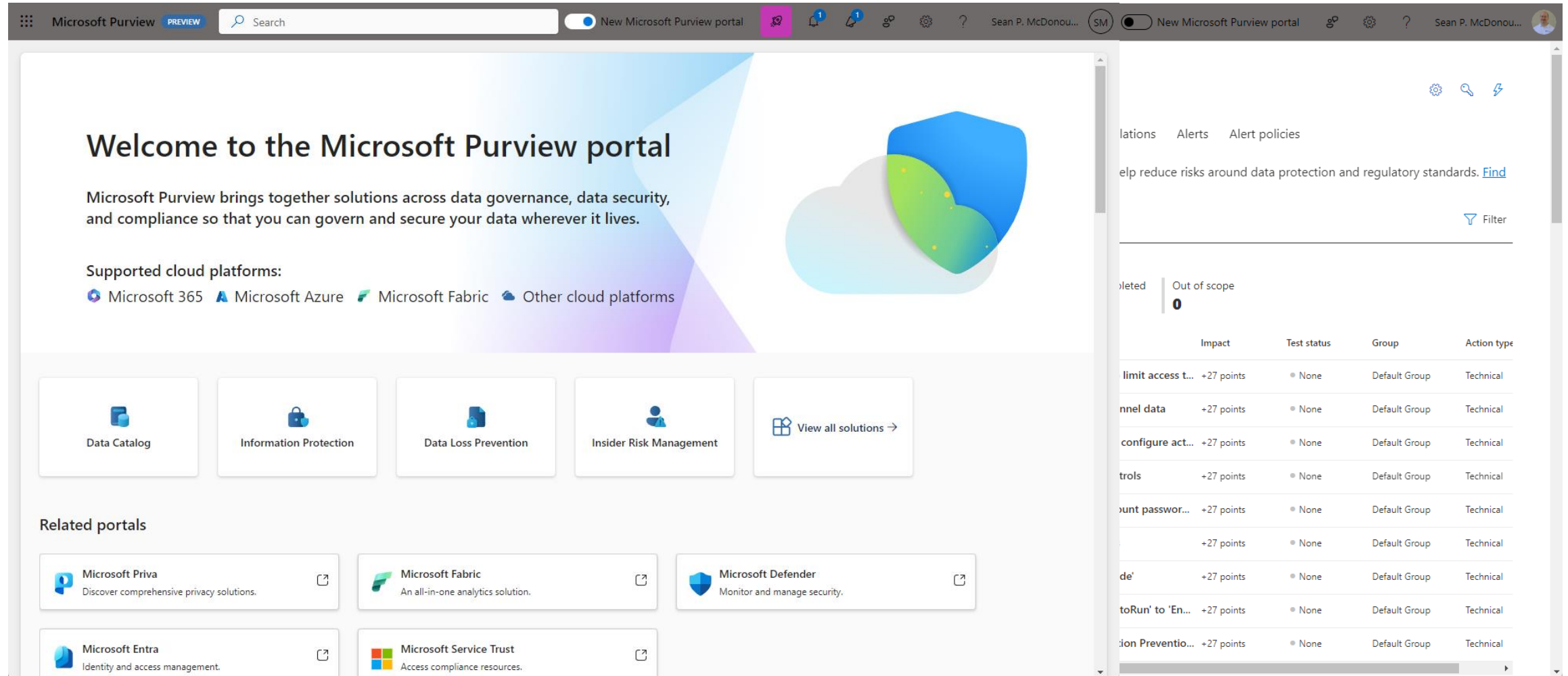


WHAT IS THE COMPLIANCE PORTAL?

- For brevity, I'm simply going to refer to the Compliance Portal as "Purview" going forward.
 - Microsoft appears to be going in the Purview direction, even if the tooling is still catching up.
 - What you will see will depend on will depend on the licensing you have.
- We discussed it briefly for a bit this morning, but what does it *really* do besides unified logging?
 - Unified logging is provided in service to other "higher goals" like digital loss prevention (DLP), eDiscovery, auditing, and similar sorts of goals.
 - Microsoft had gamified the Purview interface in an attempt to incentivize tenant admins to run audits, set up policies, and take other actions through Purview.
 - I'll let Microsoft do the tl;dr run-down.



DEPENDENDING ON YOUR LICENSING ...



Microsoft Purview **PREVIEW** Search New Microsoft Purview portal

Welcome to the Microsoft Purview portal

Microsoft Purview brings together solutions across data governance, data security, and compliance so that you can govern and secure your data wherever it lives.

Supported cloud platforms:

- Microsoft 365
- Microsoft Azure
- Microsoft Fabric
- Other cloud platforms

Data Catalog Information Protection Data Loss Prevention Insider Risk Management View all solutions →

Related portals

- Microsoft Entra: Discover comprehensive privacy solutions.
- Microsoft Fabric: An all-in-one analytics solution.
- Microsoft Defender: Monitor and manage security.
- Microsoft Service Trust: Access compliance resources.

Alerts Alert policies

help reduce risks around data protection and regulatory standards. [Find](#)

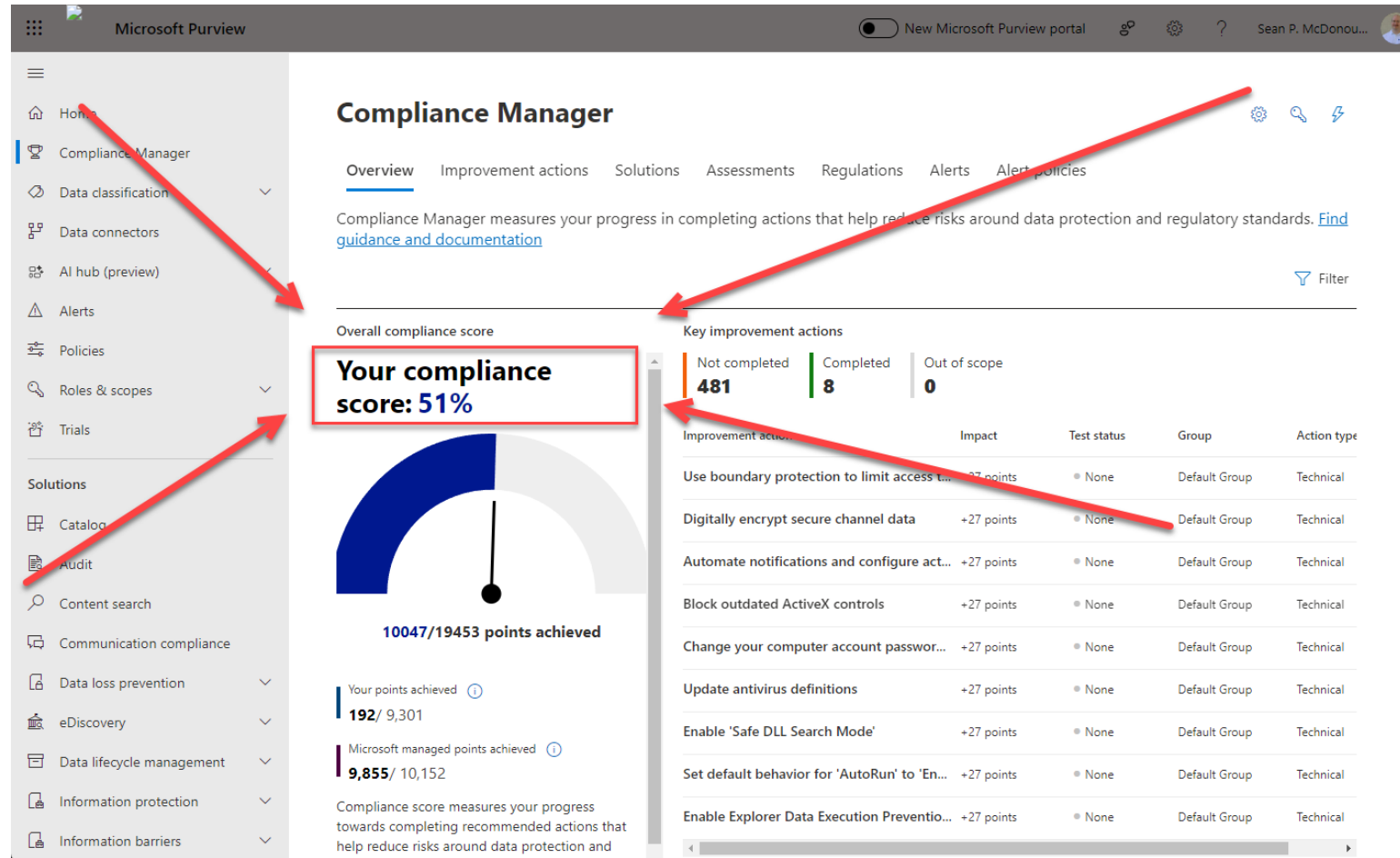
Filter

Impact	Test status	Group	Action type	
limit access t...	+27 points	None	Default Group	Technical
nnel data	+27 points	None	Default Group	Technical
configure act...	+27 points	None	Default Group	Technical
trols	+27 points	None	Default Group	Technical
unt passwor...	+27 points	None	Default Group	Technical
	+27 points	None	Default Group	Technical
de'	+27 points	None	Default Group	Technical
toRun' to 'En...	+27 points	None	Default Group	Technical
ion Preventio...	+27 points	None	Default Group	Technical

You may see this ...

... or something like this.

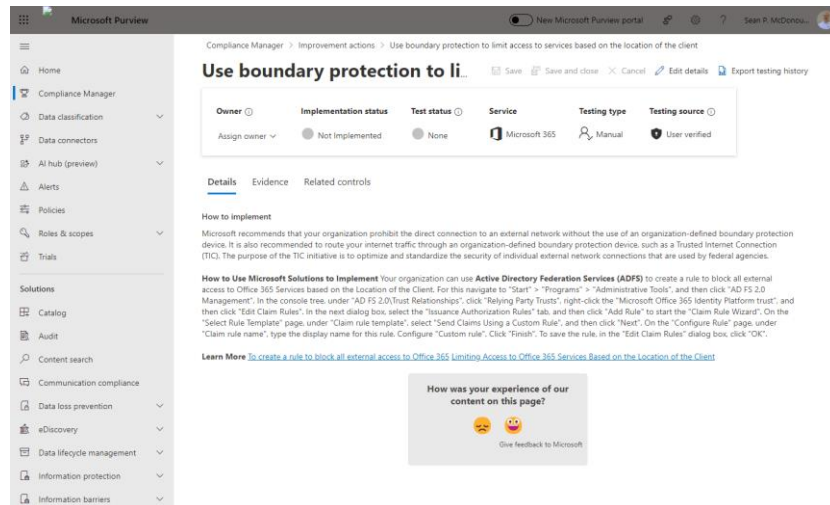
DO AS I SAY, NOT AS I DO



The one thing I can't debate, though, is that my overall compliance posture is "bent over."

THE TRUE PURVIEW PORTAL IS IN BETA

- or, as Microsoft would say, “public preview.”
 - The information I’m going to share will be based on the version of Compliance Manager / Purview that Microsoft is calling “classic.”
- The classic portal makes it very easy to get involved with the creation of policies. As an example, let’s walk through a recommendation:



STAYING IN THE KNOW

- And Purview is really good at letting you know when it detects changes.
 - By default, tenants have a default policy to alert identified administrators that changes have been detected.
 - Great example: I received this email at my sean@bitstreamfoundry.com account as well as my sean@mcdonough.online account after I made a positive change to address a compliance issue that boosted my score in my BitstreamFoundry tenant.

Medium-severity alert: Compliance Manager Default Alert Policy

Office365Alerts@microsoft.com
To: Sean P. McDonough; Sean P. McDonough



A medium-severity alert has been triggered

 **Compliance Manager Default Alert Policy**

Severity:  Medium

Time: 5/30/2024 9:25:00 PM (UTC)






Activity: COMPLIANCEMANAGER-SCORECHANGE

Details: Improvement action name: Digitally encrypt secure channel data

See details in the Microsoft 365 compliance center

[View alert details](#)

Thank you,
The Office 365 Team

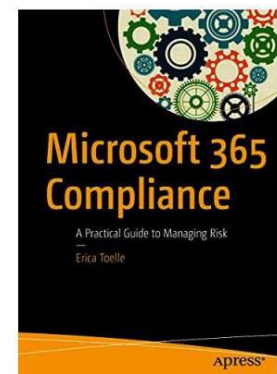
  Reply  Reply All  Forward  
Thu 5/30/2024 5:25 PM



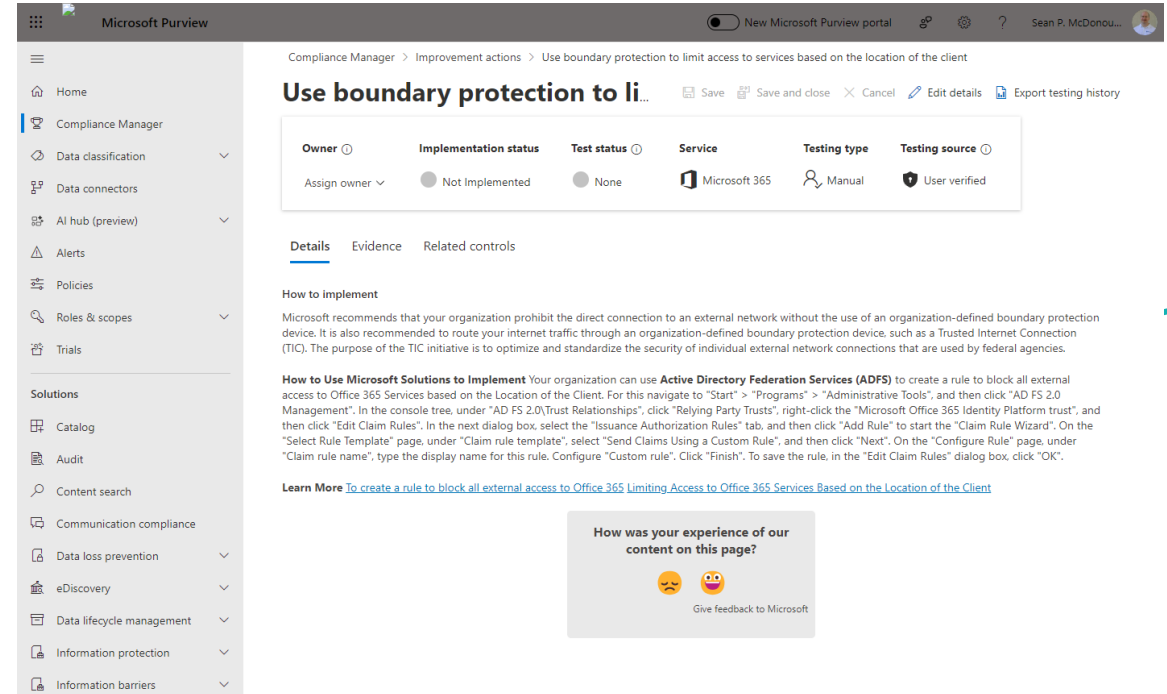
WORRIED YOU WON'T BE KEPT BUSY?



- The number of compliance actions you might undertake should keep you pretty busy.
 - Figure out how your compliance score is generated.
 - Get set for a long list of follow-up items ... or not.
 - Cloud admins are still busy admins by all accounts.
- A full compliance overview would be a workshop by itself.
 - Great alternative to that is a book by Erica Toelle (former MVP now a Microsoft Senior Product Marketing Manager for Purview).
- **Microsoft 365 Compliance**
 - Released in 2021 on by Apress
 - Solid explanations and guidance that still holds up today.



IMPROVEMENT ACTIONS (WORKING) DEMO)



Microsoft Purview

Compliance Manager > Improvement actions > Use boundary protection to limit access to services based on the location of the client

Use boundary protection to li...

Save Save and close Cancel Edit details Export testing history

Owner	Implementation status	Test status	Service	Testing type	Testing source
Assign owner	Not Implemented	None	Microsoft 365	Manual	User verified

Details Evidence Related controls

How to implement

Microsoft recommends that your organization prohibit the direct connection to an external network without the use of an organization-defined boundary protection device. It is also recommended to route your internet traffic through an organization-defined boundary protection device, such as a Trusted Internet Connection (TIC). The purpose of the TIC initiative is to optimize and standardize the security of individual external network connections that are used by federal agencies.

How to Use Microsoft Solutions to Implement

Your organization can use **Active Directory Federation Services (ADFS)** to create a rule to block all external access to Office 365 Services based on the Location of the Client. For this navigate to "Start" > "Programs" > "Administrative Tools", and then click "AD FS 2.0 Management". In the console tree, under "AD FS 2.0/Trust Relationships", click "Relying Party Trusts", right-click the "Microsoft Office 365 Identity Platform trust", and then click "Edit Claim Rules". In the next dialog box, select the "Issuance Authorization Rules" tab, and then click "Add Rule" to start the "Claim Rule Wizard". On the "Select Rule Template" page, under "Claim rule template", select "Send Claims Using a Custom Rule", and then click "Next". On the "Configure Rule" page, under "Claim rule name", type the display name for this rule. Configure "Custom rule". Click "Finish". To save the rule, in the "Edit Claim Rules" dialog box, click "OK".

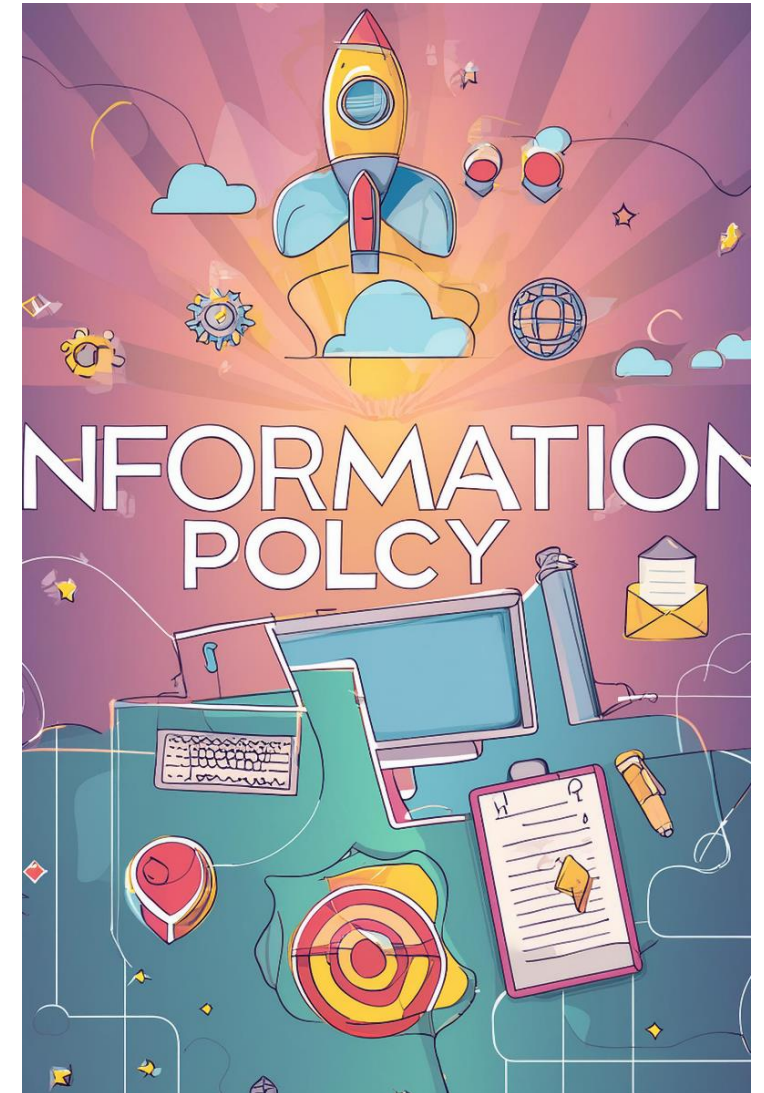
[Learn More To create a rule to block all external access to Office 365 Limiting Access to Office 365 Services Based on the Location of the Client](#)

How was your experience of our content on this page?

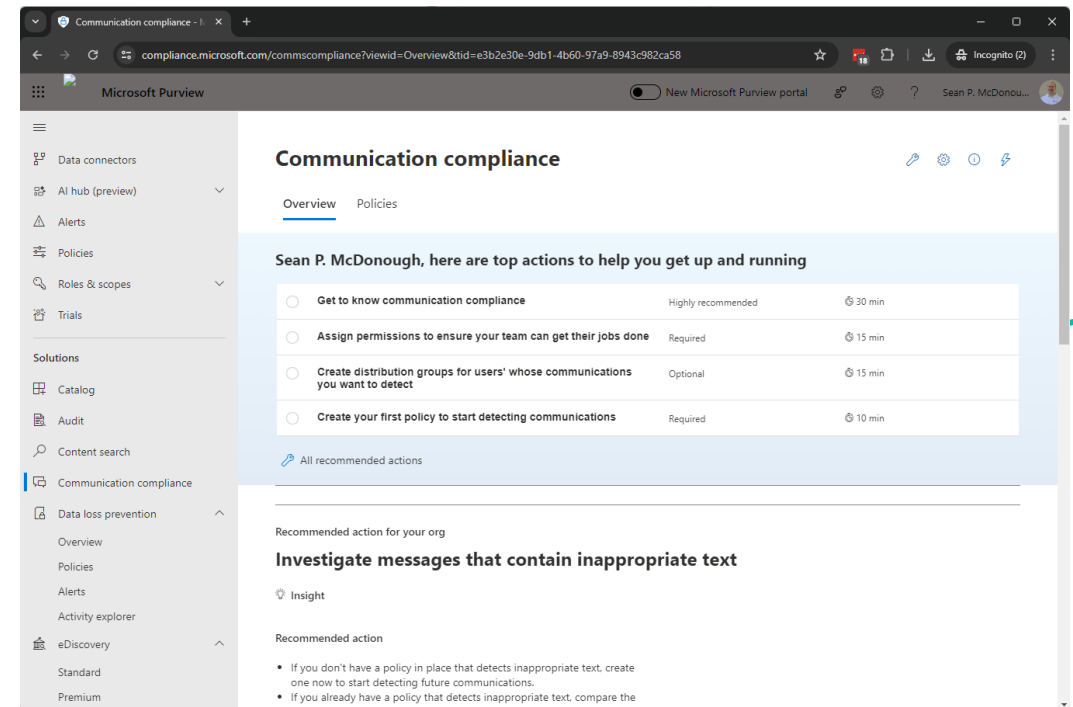
Give feedback to Microsoft

WHAT ELSE CAN PURVIEW DO?

- **Quite a bit, actually**
 - Data Loss Prevention (DLP)
 - eDiscovery
 - Establish compliance policies and report on them
 - (Sensitive) Information Protection
 - Data lifecycle policy creation and management
 - ... just to name a few.
- **As with the rest of Compliance Manager, it operates across cloud workloads.**
- **Use what you need to depending on regulations and guidelines your org must comply with.**
 - Holds are particularly worthy of mention.
- **Very approachable, powerful, and informative.**



COMMUNICATION COMPLIANCE (WORKING) DEMO)



The screenshot shows the Microsoft Purview Communication Compliance dashboard. The left sidebar contains navigation links for Data connectors, AI hub (preview), Alerts, Policies, Roles & scopes, Trials, Solutions, Catalog, Audit, Content search, Communication compliance (selected), Data loss prevention, Overview, Policies, Alerts, Activity explorer, eDiscovery, Standard, and Premium. The main content area is titled 'Communication compliance' and includes tabs for Overview and Policies. A message from Sean P. McDonough provides top actions to help get up and running. Below this, there are sections for 'Recommended action for your org' and 'Investigate messages that contain inappropriate text'.

Action	Priority	Estimated Time
Get to know communication compliance	Highly recommended	30 min
Assign permissions to ensure your team can get their jobs done	Required	15 min
Create distribution groups for users' whose communications you want to detect	Optional	15 min
Create your first policy to start detecting communications	Required	10 min

[All recommended actions](#)

Recommended action for your org

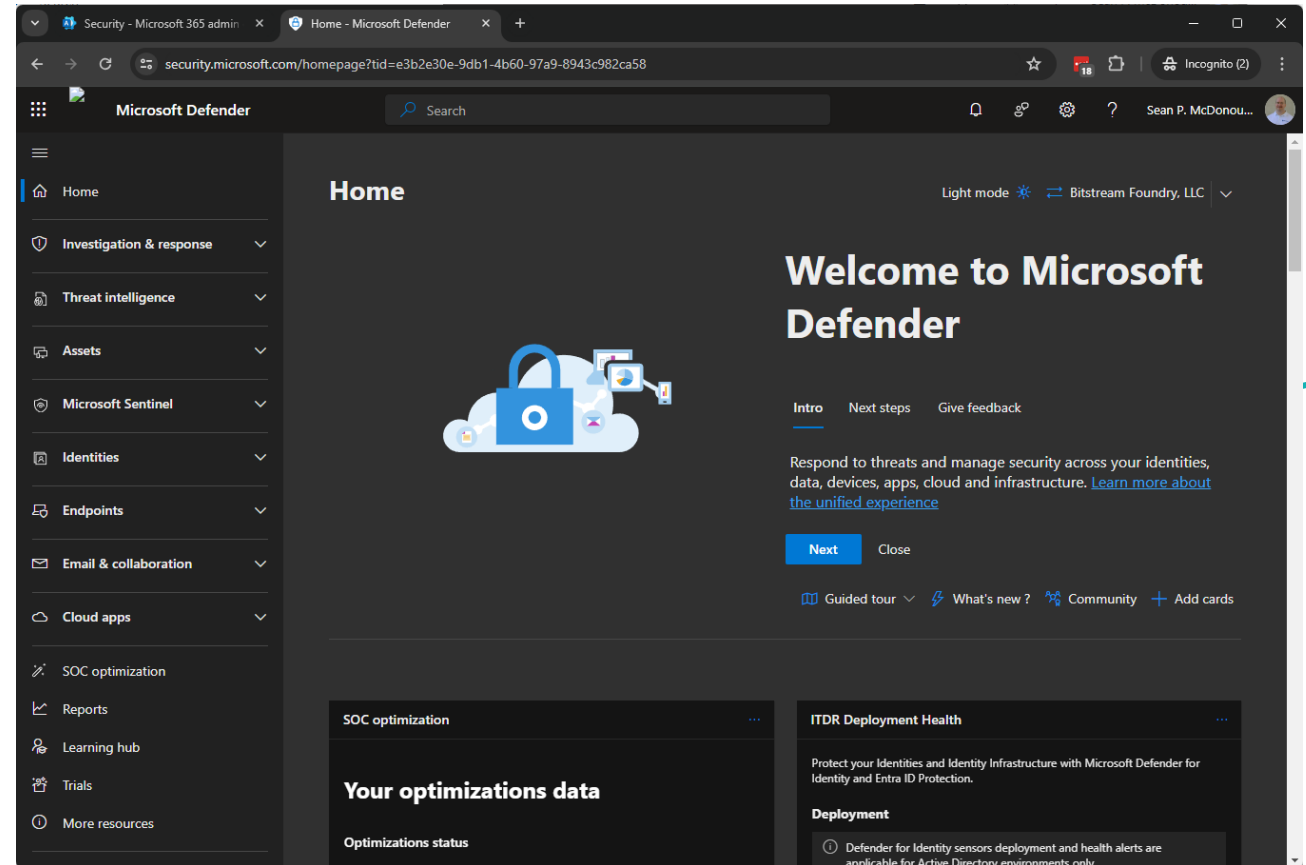
Investigate messages that contain inappropriate text

Insight

Recommended action

- If you don't have a policy in place that detects inappropriate text, create one now to start detecting future communications.
- If you already have a policy that detects inappropriate text, compare the available classification categories of these messages to ensure they are included in your policy.

MICROSOFT 365 DEFENDER PORTAL



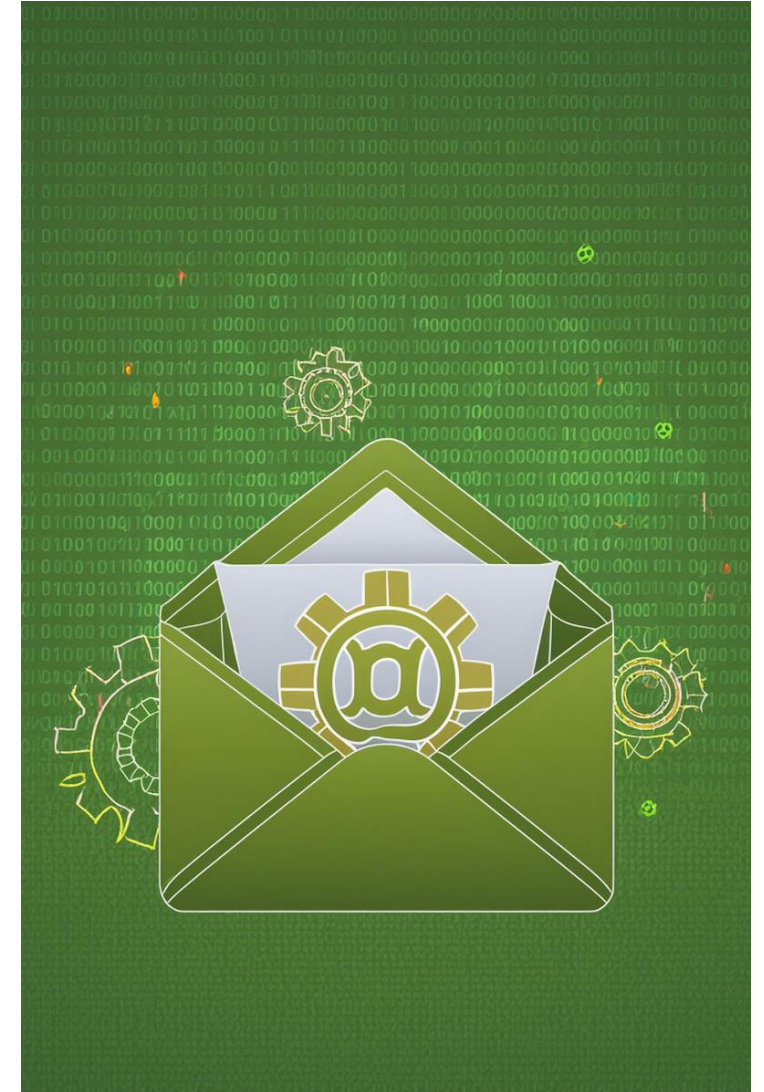
WHAT IS MICROSOFT 365 DEFENDER?



- Microsoft is now calling it Defender XDR
- Defender XDR helps security teams protect using information from other Microsoft security products like:
 - Microsoft Defender for Endpoint
 - Microsoft Defender for Office 365
 - Microsoft Defender for Identity
 - Microsoft Defender for Cloud Apps
 - Microsoft Defender Vulnerability Management
 - Microsoft Entra ID Protection
 - Microsoft Data Loss Prevention
 - App Governance
- Like Purview, Defender XDR represents Microsoft's "2nd wave" of integrated tools.

WHAT IS MICROSOFT 365 DEFENDER?

- The individual admin centers used to house the data and not talk amongst services.
 - What I'm calling Microsoft "2nd wave" of integrated tools centralizes cross-functional concerns with all workloads.
 - This is generally better for admins, but it does make it tough sometimes to figure out which tool has specific functionality of interest from moment to moment.
- Defender XDR is going to be of particular interest to those tasked with protecting the tenant and its users.
 - Defender XDR brings integrated intelligence and analysis capabilities so that security admins aren't looking for the proverbial "needle in a haystack."
- Previously known as Microsoft Threat Protection.



Microsoft Threat Protection

Overview



User receives email



User opens attachment



User clicks URL



Lateral exploitation



Exfiltration

DEFENDER XDR IS AN AMALGAM



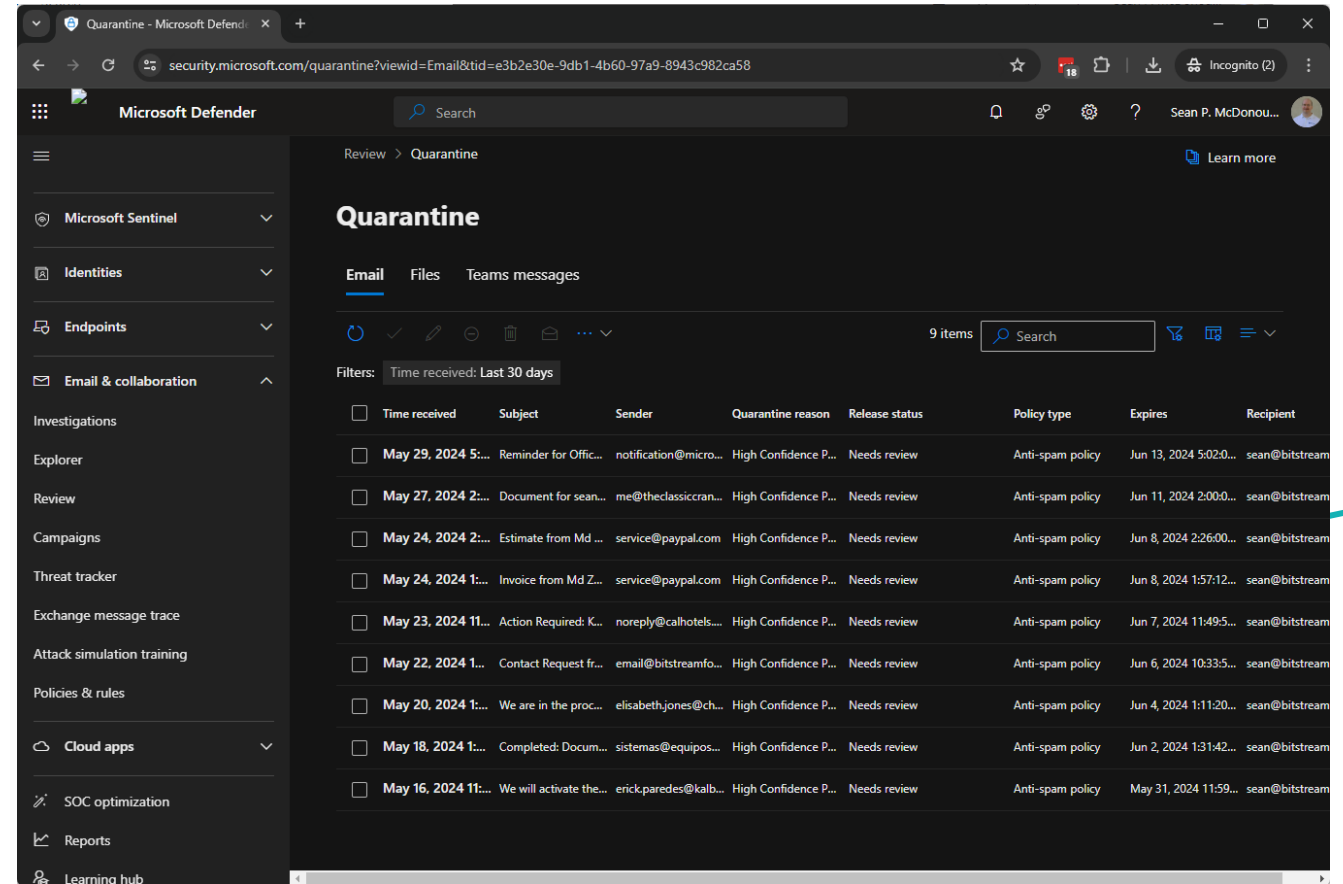
- It leans towards focusing on a cross-section of messaging (email, Teams, etc.) workloads.
 - Many end-user threats tend to come through basic communications like spam, phishing, spoofing, etc.
- It also works across workloads, messages, endpoints, and provides intelligent interpretation of potential threat data.
 - This is part of the “normalization” that was discussed in the video.
 - If Defender XDR finds a trail of questionable messaging or interaction that represents a true threat, it brings it to your attention.
 - It doesn’t make you go looking for the problem (unless you want to, of course).
 - Also proactively attempts to manage and contain the threat.

DEFENDER XDR REQUIRES INVESTMENT

- Like Purview with compliance, you get out of Defender XDR what you are willing to invest.
 - Deploying to clients, building application profiles, registering agents and endpoints, etc., require some investment of time to realize maximum security.
 - Some advanced capabilities (cloud app monitoring) is hardware/infrastructure dependent.
- Let's also be honest about this, too: many capabilities may require advanced licensing (like E5 licenses).
 - Microsoft Cloud App Security (as it was known before Defender XDR integration) is a great example and not to be confused with Microsoft 365 Cloud App Security.
- We'll look at a couple of XDR areas but expect to invest some time and learning here.



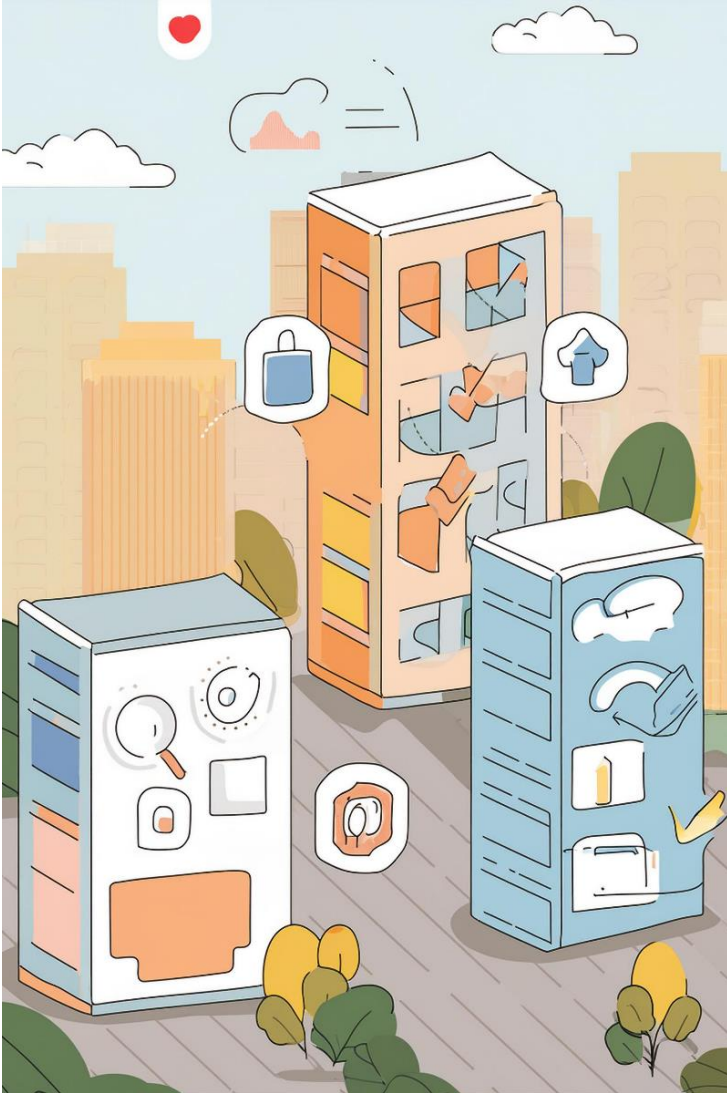
A BRIEF SPIN AROUND THE BLOCK WITH DEFENDER XDR



In the top-left corner, there are two overlapping geometric shapes: a magenta triangle pointing towards the top-right and an orange triangle pointing towards the bottom-left.

ADDITIONAL ADMIN CENTERS

THERE'S MORE?



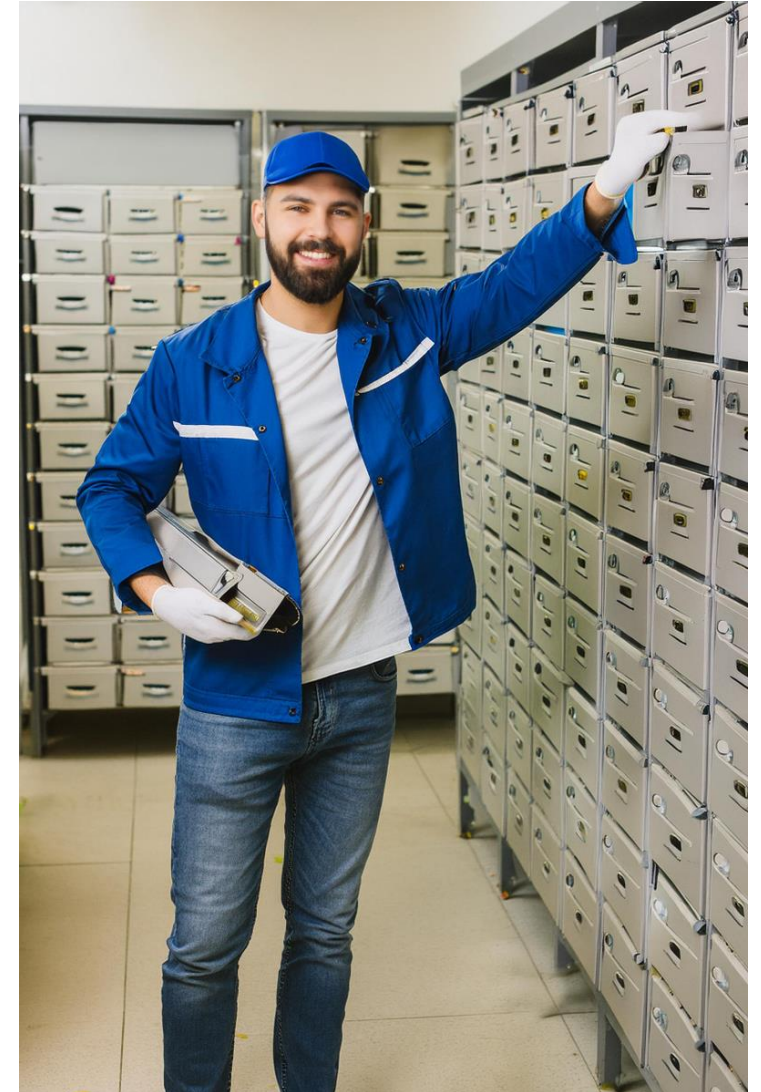
- We've spent the better part of the day getting familiar with M365 tenant administration.
 - We haven't covered everything, though.
 - Realistically, we won't be able to cover everything.
- I've got a few more quick "tours" prepared; since we're getting late in the day, though ...
 - Is there something you were expecting to see that you haven't?
 - We can examine it, but I want to be realistic: I may not have any content or particular insight into the functionality and/or admin center.
- What I'm prepared to cover:
 - Exchange Online Administration
 - Microsoft Teams Administration
 - SharePoint Online Administration

In the top-left corner, there are two overlapping geometric shapes: a magenta triangle pointing towards the top-right and a yellow triangle pointing towards the bottom-left.

MICROSOFT EXCHANGE ADMIN

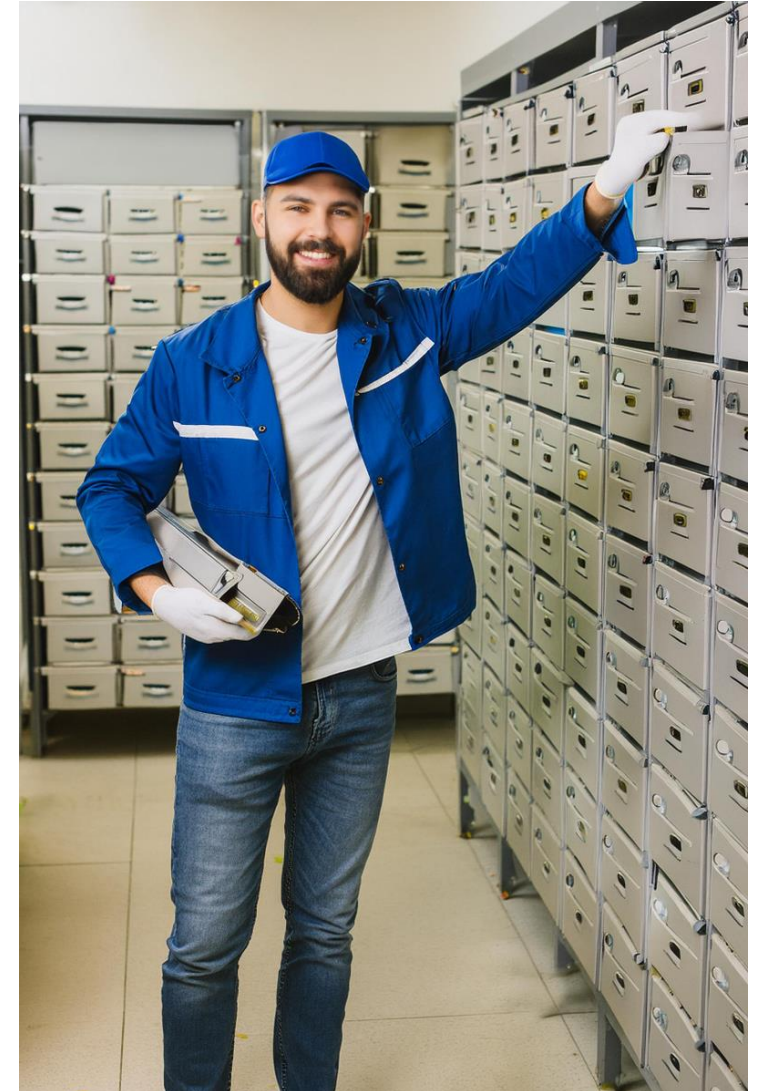
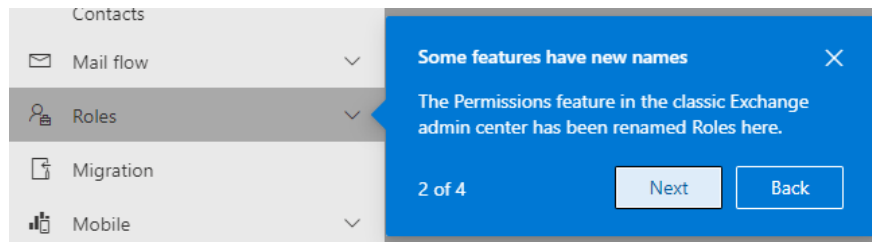
ONE OF THE MORE USEFUL CENTERS

- Some of you may be (or may have been) on-prem Exchange admins.
 - Functionality here should be relatively familiar but without the focus on server-centric management and other similar administrative/infrastructure concerns.
- E-mail is a big driver for many organizations shifting to the cloud.
 - Being able to focus on the business at hand rather than how email is managed, backed-up, retained, filtered for spam and phishing attacks, updated, etc., is a big draw.
 - There's still a huge focus on the related policies – just not the technical management of those related policies.
- Letting someone else handle the tech and infrastructure frees admins up ...
 - ... to focus on the more valuable business problems.



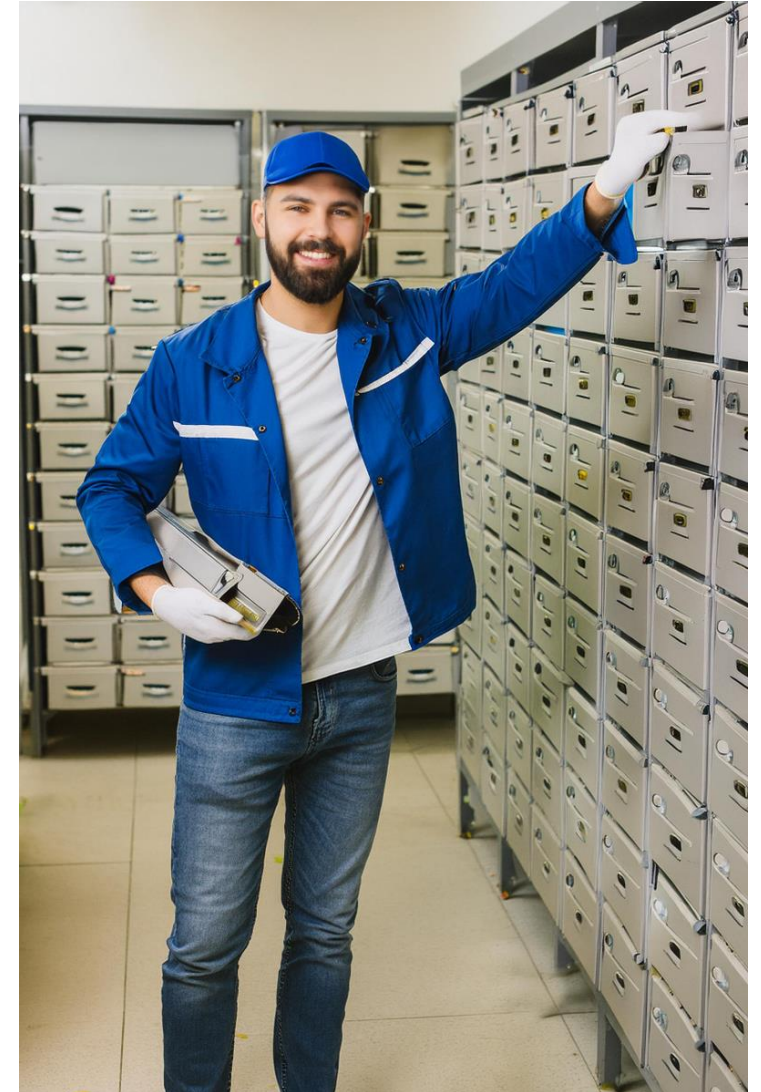
ONE OF THE MORE USEFUL CENTERS

- With things like public folders and other on-prem Exchange targets, there are (arguably) better options in the cloud.
- If we're talking about sharing files, OneDrive and SharePoint Online have many similar options with better control.
- Note that Exchange admin, at this point in time, has a newer admin experience and a "classic" admin experience.
 - You can move between them fairly easily.
 - The Exchange online admin center includes guidance and help regarding the difference in capabilities. For example:

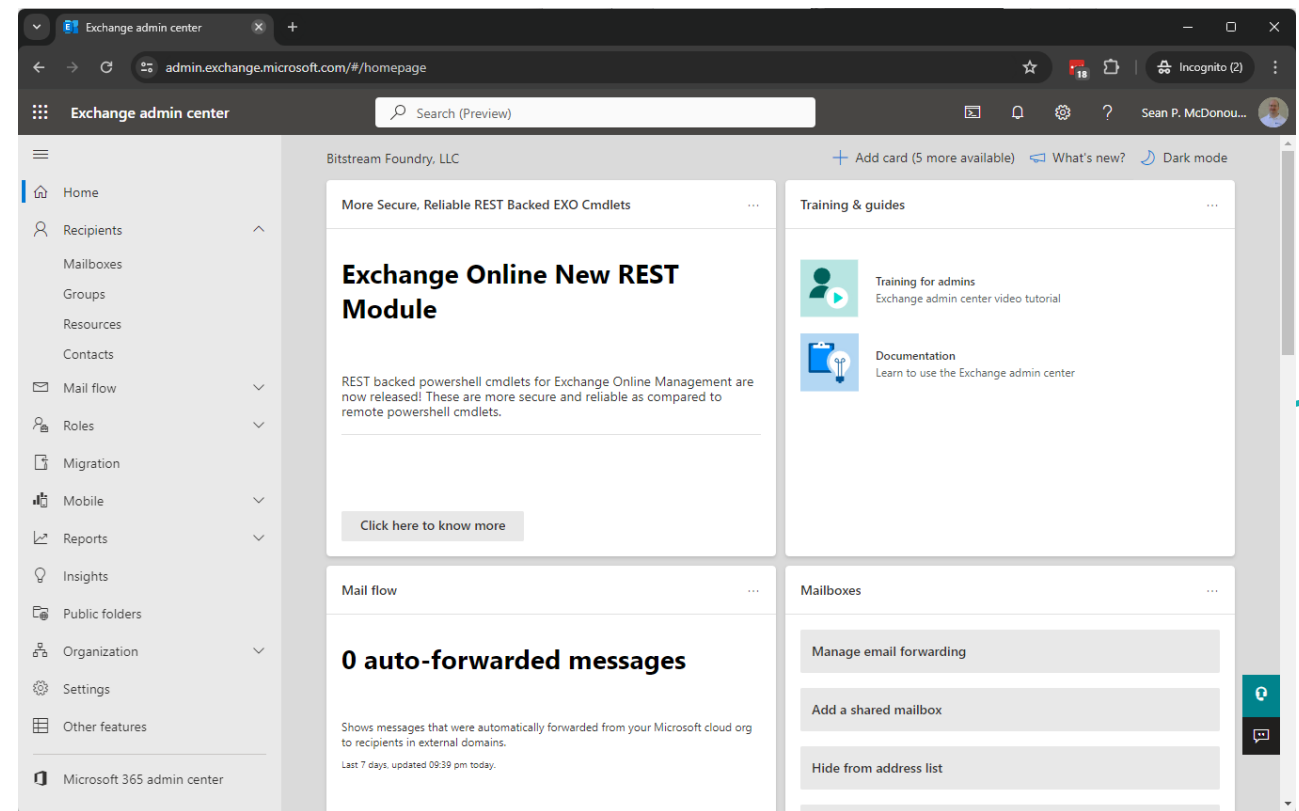


ONE OF THE MORE USEFUL CENTERS

- Email was one of the original BPOS workloads that Microsoft focused on.
 - More on BPOS a little later.
- Given the longevity of email handling for organizations, you'll bet a lot of PowerShell admin relies on tie-ins to the Exchange PowerShell cmdlets.
 - We saw this a little earlier with the unified logging setting for your tenant.
- Mailboxes are still a primary focus.
 - Groups (including distribution groups) are, as well.
 - Controls for client Outlook settings – including mobile.
 - Protection of mailboxes, reporting, and alerts.
 - Also, Public folder controls and other Exchange mainstays.



A LOOK AT THE EXCHANGE ONLINE ADMIN CENTER

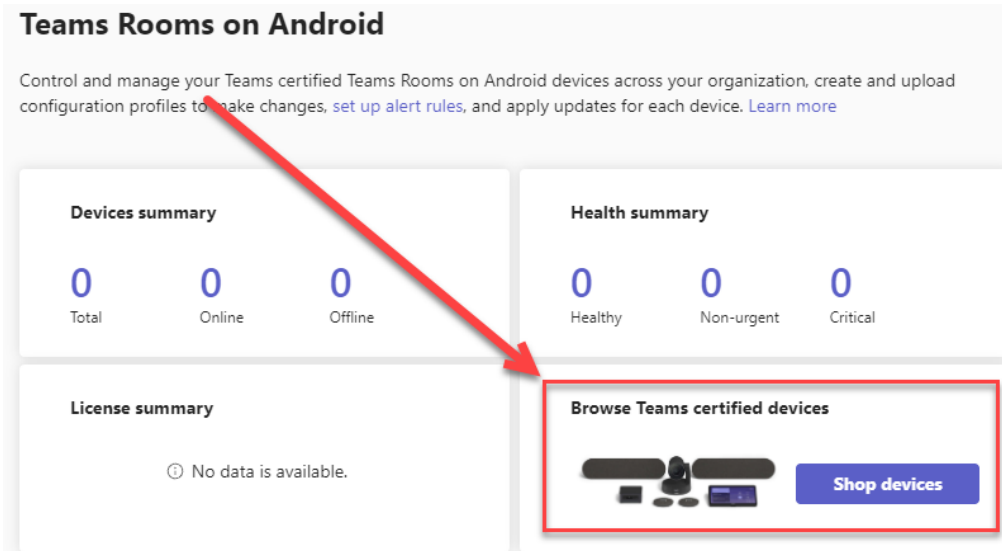


In the top-left corner, there are two overlapping geometric shapes: a magenta rounded triangle pointing towards the top-right, and a yellow triangle pointing towards the bottom-left.

MICROSOFT TEAMS ADMIN

BASIC CONFIG AND ADVERTISEMENTS

- That pretty much sums-up the Microsoft Teams Admin Center
 - It shouldn't come as a surprise that I don't have much use for the Teams Admin Center.
 - Here's a great example. Need a Teams phone?



- I can't say I agree with this approach much.

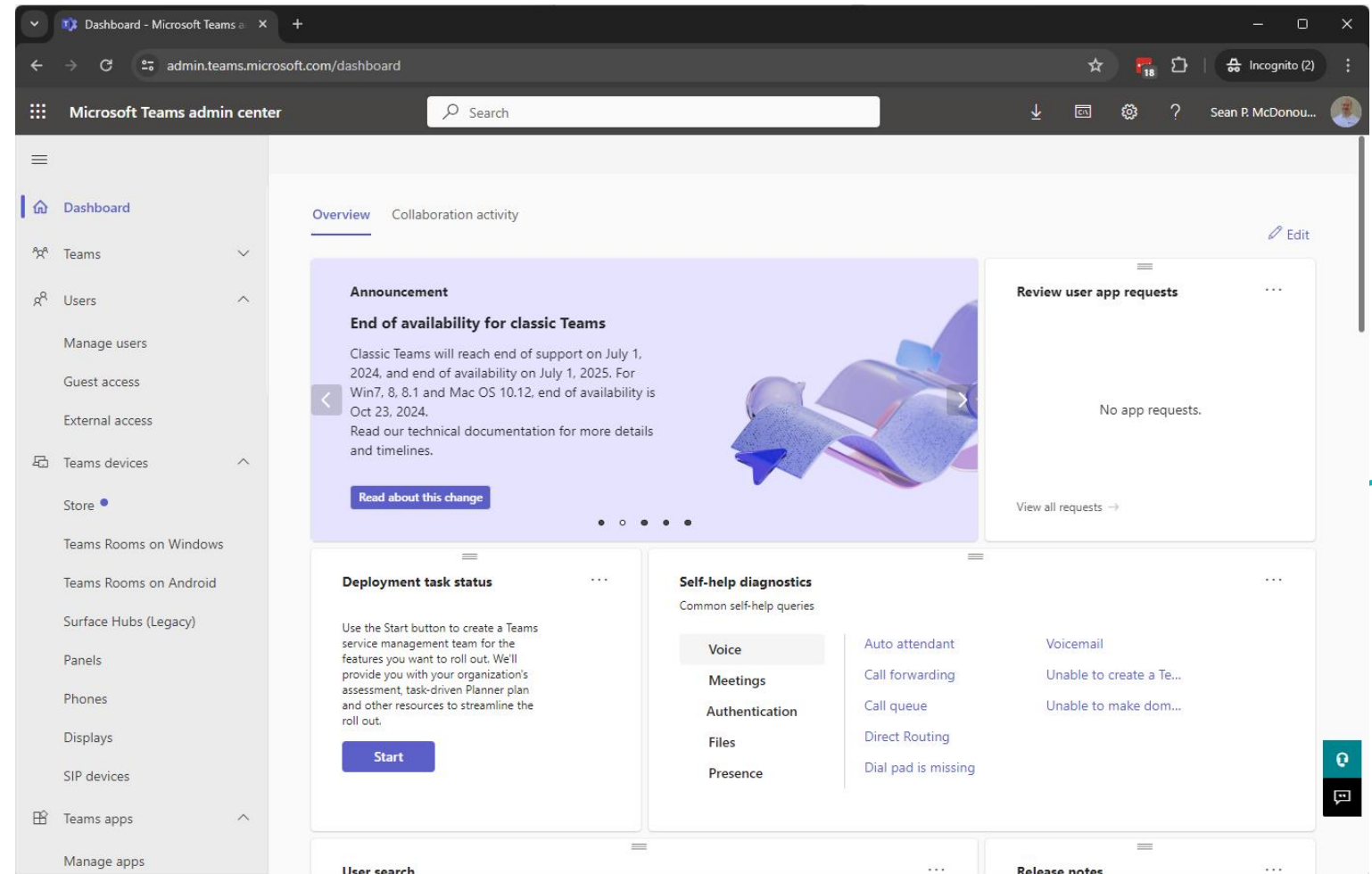


BASIC CONFIG AND ADVERTISEMENTS

- As far as configuration goes, it's probably most valuable if you have Teams with VoIP capability.
 - Assign phone numbers to users, for example.
 - Operator connections and direct routing configuration.
- Service-wide settings can be also be configured.
 - Organize users into groups for policy assignment.
 - Enable Teams apps for use
 - Control messaging policies, such as message deletion and interoperability with Skype for Business
- Policies offer quite a few configuration options.
 - Call hold and call park policies.
 - Deployment to groups (such as frontline workers)
 - Call queues and voicemail policies
- Relevant analytics and reports, as well.



A (QUICK) TEAMS ADMIN TOUR

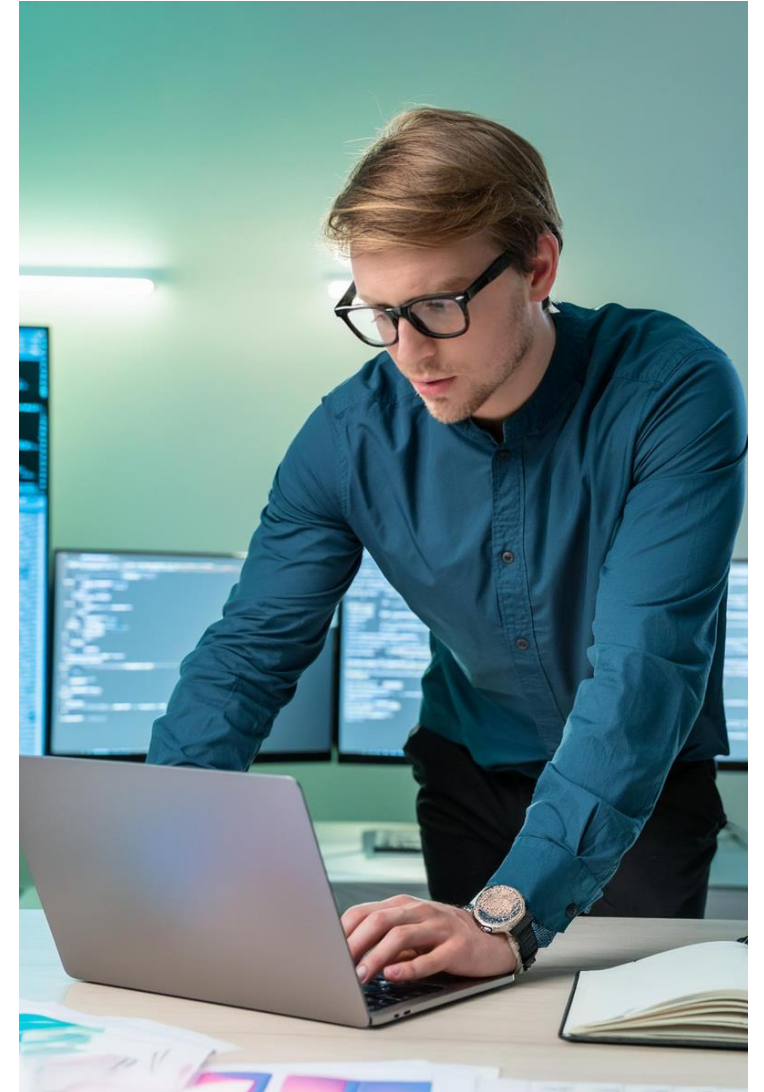


SHAREPOINT ONLINE (SPO) ADMIN

A decorative teal line graphic that starts from the right edge of the slide, curves downwards, and then extends diagonally towards the bottom right corner.

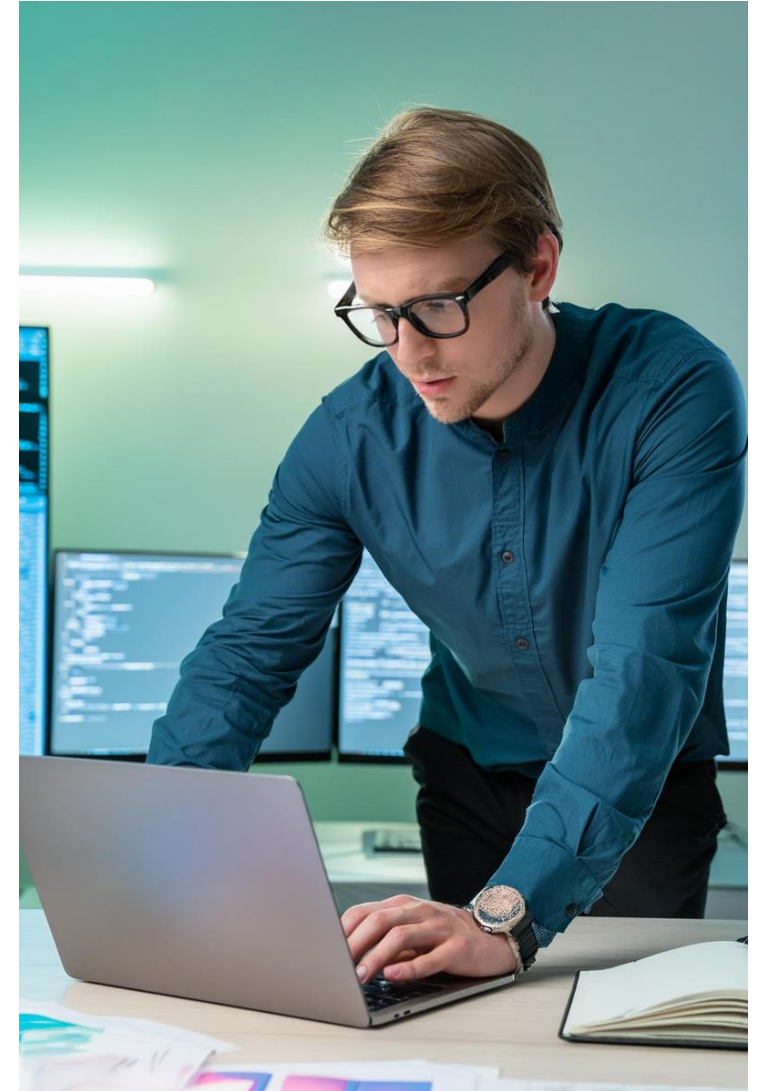
SHAREPOINT LINEAGE

- As mentioned earlier, my experience with SharePoint extends back to 2004.
 - If you were working with SharePoint at that time, you were standing up your own server environments and (hopefully) proficient at setting up SharePoint farms.
 - Learning SharePoint forced most IT Pros and developers to learn some amount of SharePoint operational and services architecture.
- Many of us were true switch-hitters who did both administrative work and development to varying degrees.
- Nowadays, SharePoint internals is becoming a lesser-known and understood area.
 - I think SPO has something to do with that.

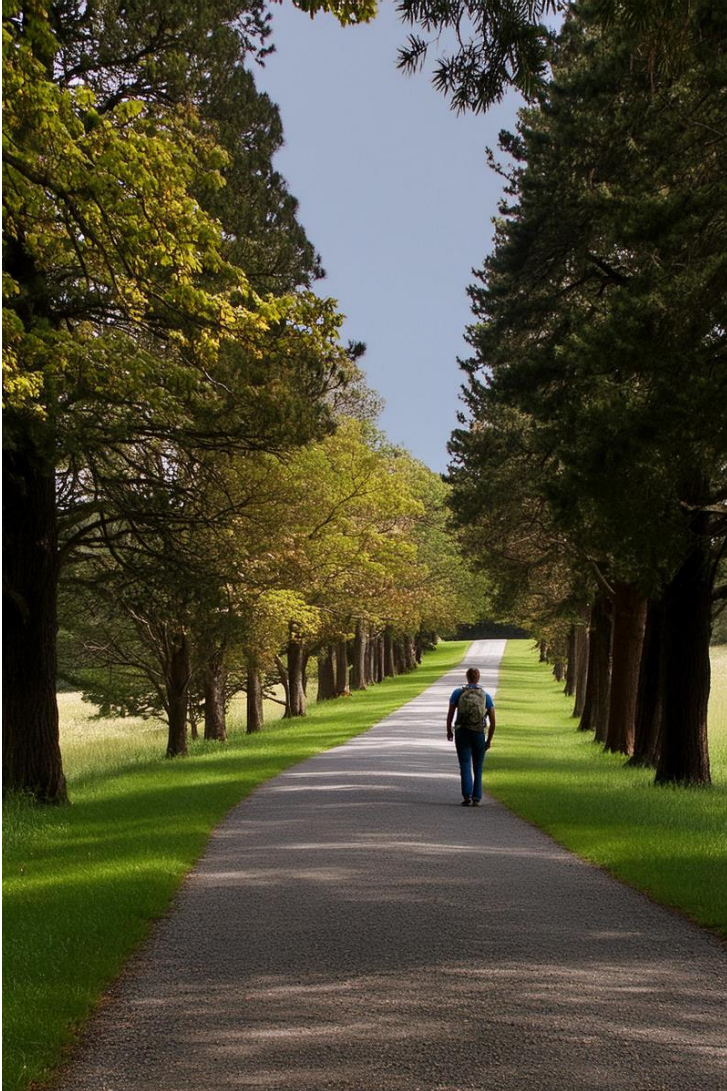


SHAREPOINT LINEAGE

- **SharePoint Online was introduced with BPOS**
 - BPOS = Business Productivity Online Suite – a precursor to what we currently know as Microsoft 365.
 - BPOS came online about five years before Office 365 in the year 2005.
 - It is how Microsoft began learning how to be a cloud services provider, and it was rough.
- **Thank the earlier lessons of BPOS (and to a lesser extent, Office 365) for your experience today.**
 - Administrators can now focus on adding true business value and solving important issues for customers.
 - They no longer have to keep servers running, no longer need to worry about service packs, rollups, and hotfixes.
 - M365 admin is fundamentally different from farm admin.

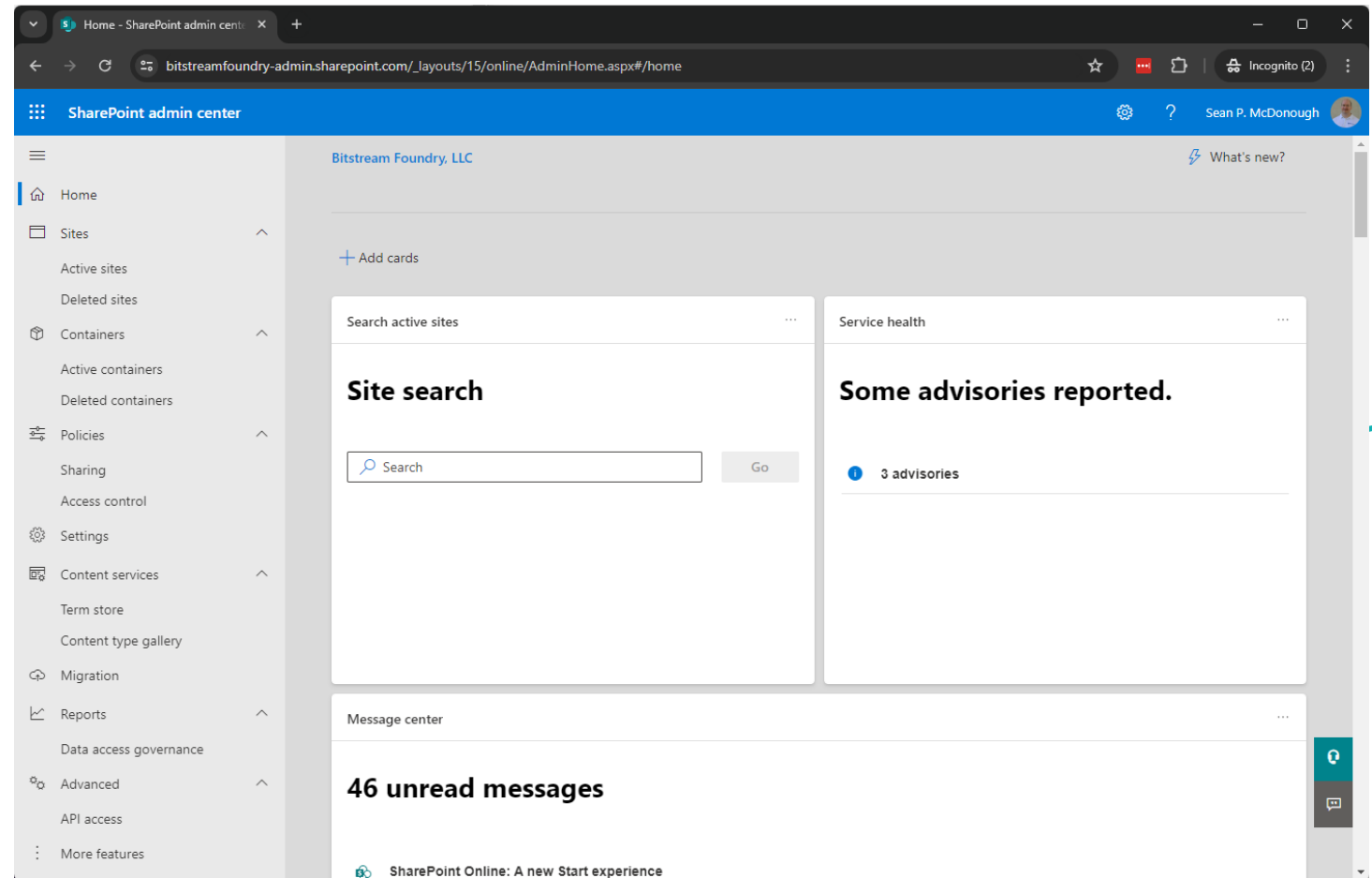


ENOUGH WITH MEMORY LANE



- The point is this: today's admin experience is different from your predecessor's experience.
 - We're going to look at common admin tasks and concerns modern administrators deal with daily.
 - We won't be looking at SPO architecture and infrastructure (i.e., "plumbing") any more than is needed to understand some concepts – I promise!
- What are (common) SPO cloud admin concerns?
 - (De-)provisioning sites
 - Managing users and policies (such as sharing and archival)
 - Managing access groups, permissions (including app permissions), and user rights
 - Tenant-level Search, Term Store, et al administration
 - Content management and migration
 - Teams and OneDrive related requests and issues

MODERN SPO ADMIN TOUR



AND ONE FINAL APPEAL

- I'm a huge proponent of Microsoft Philanthropies' TEALS program
 - TEALS stands for "technical education and literacy in schools," and I've been a volunteer for five years.
 - The goal of the TEALS program is to bring computer science education to underserved and traditionally marginalized populations.
- TEALS operates on volunteer basis
 - If you have any technical background, you would do well by volunteering for the program.
 - I've co-instructed both "Introduction to Game Programming" and a CompTIA Security+ curriculum over the years.
 - It is exceptionally rewarding on a personal level. I get at least as much out of it as I put into it.
 - TEALS would benefit from your participation!
- Visit <https://www.microsoft.com/en-us/teals>



In the top-left corner, there are two overlapping geometric shapes: a magenta triangle pointing towards the top-right and a yellow triangle pointing towards the bottom-left.

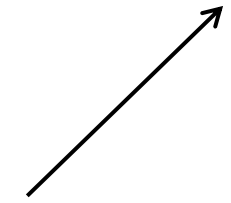
WRAP-UP AND CONTACT INFO

A thin teal line starts from the right edge of the slide, curves downwards and to the left, and then continues downwards towards the bottom right corner.

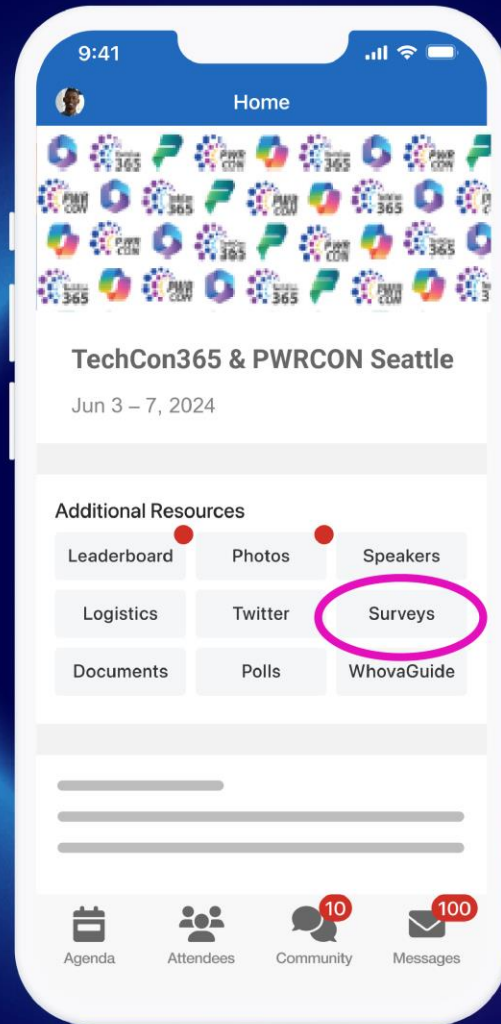


THANK YOU FOR ATTENDING

Obviously not me
(*but the sentiment is*)



Adobe PhotoShop Beta AI Prompt Used to Generate Image: *A thankful balding and middle-aged presenter in polo shirt and shorts expressing his tremendous appreciation and thanks to the gathered audience*



How was the session?

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About: <https://spmcdonough.com/>

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