**Lab 17-02: M365 Business Management Capabilities**

In this lab, you will learn to work with M365 groups, Microsoft Planner, Forms, and Power BI. You will also explore through Microsoft Endpoint Manager.

**Task o1: Create M365 Groups**

|  |
| --- |
| 1. Open a new browser window and log in to the admin center at [https://admin.microsoft.com](https://admin.microsoft.com/).      1. From the navigation menu, click on the Groups icon and click on Active groups. Now select Add a Microsoft 365 group icon.      1. On the Basics page, type a name for the group as Sales-demo and a description(optional).      1. On the Owners page, select the name of one or more people who will be nominated to manage the group. Click Next.        1. Now, on the Members page, you can join 20 members, including the owner, and then click Next.        1. Now, on the Settings page, type a unique email address for the group, select a privacy option based on your requirement and whether you want to add Microsoft Teams for the group, and then click Next.      1. Review your settings and make any changes if needed, select Create group, and then close.      1. In the admin center, select the name of the group to which you want to add members. To add members to the group, navigate to the Members tab and select View all and manage members.      1. Click on Add members, select the users you want to add, and then click on Add. |

**Task 02: Explore Microsoft Planner**

|  |
| --- |
| 1. Open a new browser window and log in to the office365 center at [https://www.office.com](https://www.office.com/).      1. In the office365 portal, from the App launcher, click on All apps, and in the search bar, search for Planner; from the Open context menu, click on Open in the new tab, this will redirect you to the Planner web page. 2. Select New plan in the left pane.      1. In the New Plan window:  * Enter a name for the plan as Demo-plan * Make the plan public if you need it to be visible to the rest of your organization and in search results, or make it private if you need only plan members to see it. * Click on Add to an existing Microsoft 365 Group to create your plan in an existing group, or if needed, you can create a new group. * Select Create plan.      1. Now, to add members to the plan, from the upper-right corner of the Planner window click on Members.      1. Search the name or email address of a person within your organization that you need to add to the plan and select the person's card when it appears. 2. Now, to create a bucket, click on Add new bucket. Buckets help to organize tasks into things like workstreams, project phases, or topics.      1. Type a name for the bucket, and then press Enter. 2. Select Add task below the heading of the bucket to which you need to add a task.  * Provide a task name * Select a due date for the task * Click on Assign and choose a plan member from the list. If the right person is not listed, type a name or email address in the search box to add someone new.      1. Click on the task to open the task window. 2. Select Start Anytime below the Start date, and then choose the start date you want. Choose Due anytime below the Due date, and then select the due date you want.      1. In the task window, select Priority from here; you can set the priority of the task.      1. Select Add attachment. Select computer to attach a locally stored file, choose Link to include a link, or choose SharePoint to attach a file from a SharePoint site.      1. Navigate to and choose the file you want to attach or enter the link information. 2. You can also add comments in the Comment section. 3. Now select Charts. |

**Task 03: Setup Microsoft Forms**

|  |
| --- |
| 1. In the office365 portal, from the App launcher, click on All apps, and in the search bar, search for Forms; from the Open context menu, click on Open in the new tab; this will redirect you to the Forms web page. 2. Select New Form to begin generating your form. 3. Enter a name for your form; you can also enter a description if needed. 4. Click Add New to add a new question to the form.      1. Choose from Choice, Text, Rating, or Date questions. You can also click More question types Drop down list for more question types in Microsoft Forms to select Ranking, Likert, File upload, or Net Promoter Score® questions.      1. For now, select Choice. 2. Click Add New to add more questions to your form. Now select Text. 3. For text questions, select Long Answer option if you need a larger text box displayed on the form.        1. Now, from the drop-down, select Between and enter the number.      1. Click Preview.        1. Now click on Back and select the Responses tab. From here you can see summary information data about your form, such as the number of responses and the average time it took for respondents to complete your form.      1. Click on the Theme at the top right of the design window and pick the color or background you want.      1. If you prefer to customize the theme, within the theme page, scroll down and select + Customize theme button. From here, you can either upload an image by clicking on the Upload image icon or customize the color of your choice by clicking the Customize color button.      1. From the top navigation menu, click on Share. From here, based on your requirement, you can either use a link, QR code, Embed, or Email option to share your form. |

**Task 04: Setup Basic PowerBI Report from a sample Excel**

|  |
| --- |
| 1. In the office365 portal, from the App launcher, click on All apps, and in the search bar, search for Power BI; from the Open context menu, click on Open in the new tab; this will redirect you to the Power BI web page.      1. Download sample data from <https://docs.microsoft.com/en-us/power-bi/create-reports/sample-financial-download> 2. In Power BI, select My workspace from the left navigation menu, click on New, and from the drop-down, select Upload a file.      1. Select Local File, browse to where you saved the Financial Sample data file, and click on Open.      1. On the Local File page, select Import. 2. Click on the Financial Sample dataset. From the dropdown of +Create a report, click on From scratch.        1. The report opens in the Editing view and shows the blank report canvas.      1. Now, create visualizations. Let's say your manager requests to see profit over time. To do this, in the Fields pane, select Profit. Power BI shows a column chart with one column.      1. From the Fields pane, select Date. Power BI updates the column chart to display profit by date.      1. You can also create a map visualization. In this, you will check which countries are the most profitable. Select a blank area on your report canvas from the Fields pane, and select the Country and Profit field. Power BI forms a visual map with bubbles representing the relative profit of each location.      1. In this way, you can explore other visualization options. 2. To save your report from the top navigation menu, select File and click on Save, provide a name for your report, and select Save. |

**Task 05: Explore Microsoft EndPoint Manager**

|  |
| --- |
| 1. Open a new browser window and log in to the admin center at [https://admin.microsoft.com](https://admin.microsoft.com/).      1. From the navigation menu, scroll down to Admin centers and select Entra ID. Microsoft Entra ID overview page will appear.      1. On the left side of the page, scroll down to the protection tab, then to Security Center. On the Security page, select Conditional Access.      1. If you see Create your own policies and target specific conditions like Cloud apps, Sign-in risk, and Device Platforms with Azure AD Premium., then select it.      1. Select the Enterprise Mobility + Security e5 license, click on the Free Trial, and select Activate.        1. Refresh your browser window once you see a notification that you have Successfully activated Enterprise Mobility + Security e5.      1. Switch back to the Admin Center portal. Refresh your browser window. Now, from the navigation menu, scroll down to Admin centers and select Endpoint Manager. This will redirect you to the Endpoint Manager admin center.      1. From the navigation pane, select Dashboard to show overall details about devices and client apps in your Intune tenant.      1. From the navigation pane, select Devices to show details about enrolled devices in your Intune tenant. |