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# 1 MS-040 : Manage SharePoint and OneDrive in Microsoft 365

- **Download Latest Student Handbook and AllFiles Content**
- **Are you a MCT?** - Have a look at our [GitHub User Guide for MCTs](#)
- **Need to manually build the lab instructions?** - Instructions are available in the [MicrosoftLearning/Docker-Build](#) repository

## 1.1 What are we doing?

- To support this course, we will need to make frequent updates to the course content to keep it current with the Microsoft 365 services used in the course. We are publishing the lab instructions and lab files on GitHub to allow for open contributions between the course authors and MCTs to keep the content current with changes in the Microsoft 365 platform.
- We hope that this brings a sense of collaboration to the labs like we've never had before - when Microsoft 365 changes and you find it first during a live delivery, go ahead and make an enhancement right in the lab source. Help your fellow MCTs.

## 1.2 How should I use these files relative to the released MOC files?

- The instructor handbook and PowerPoints are still going to be your primary source for teaching the course content.
- These files on GitHub are designed to be used in conjunction with the student handbook, but are in GitHub as a central repository so MCTs and course authors can have a shared source for the latest lab files.
- It will be recommended that for every delivery, trainers check GitHub for any changes that may have been made to support the latest Microsoft 365 services, and get the latest files for their delivery.

## 1.3 What about changes to the student handbook?

- We will review the student handbook on a quarterly basis and update through the normal MOC release channels as needed.

## 1.4 How do I contribute?

- Any MCT can submit a pull request to the code or content in the GitHub repro, Microsoft and the course author will triage and include content and lab code changes as needed.
- You can submit bugs, changes, improvement and ideas. Find a new Microsoft 365 feature before we have? Submit a new demo!

## 1.5 Notes

### 1.5.1 Classroom Materials

**1.6 It is strongly recommended that MCTs and Partners access these materials and in turn, provide them separately to students. Pointing students directly to GitHub to access Lab steps as part of an ongoing class will require them to access yet another UI as part of the course, contributing to a confusing experience for the student. An explanation to the student regarding why they are receiving separate Lab instructions can highlight the nature of an always-changing cloud-based interface and platform. Microsoft Learning support for accessing files on GitHub and support for navigation of the GitHub site is limited to MCTs teaching this course only**

**1.7 title: Online Hosted Instructions permalink: index.html layout: home**

## 2 Content Directory

Hyperlinks to each of the lab exercises and demos are listed below.

## 2.1 Labs

```
{% assign labs = site.pages | where_exp:"page", "page.url contains '/Instructions/Labs'" %} | Module | Lab |  
| --- | --- | {% for activity in labs %}| {{ activity.lab.module }} | [{{ activity.lab.title }}{% if activity.lab.type  
%} - {{ activity.lab.type }}{% endif %}](/home/ll/Azure_clone/Azure_new/MS-040-Manage-SharePoint-and-  
OneDrive-in-Microsoft-365/{{ site.github.url }}{{ activity.url }}) | {% endfor %}
```

## 2.2 Demos

```
2.3 {% assign demos = site.pages | where_exp:"page", "page.url contains  
'/Instructions/Demos'" %} | Module | Demo | | --- | --- | {% for ac-  
tivity in demos %}| {{ activity.demo.module }} | [{{ activity.demo.title  
}}](/home/ll/Azure_clone/Azure_new/MS-040-Manage-SharePoint-and-  
OneDrive-in-Microsoft-365/{{ site.github.url }}{{ activity.url }}) | {%  
endfor %}
```

2.4 demo: title: 'Demo: Deploying an ARM Template' module: 'Module 1: Ex-  
ploring Azure Resource Manager'

## 3 Demo: Deploying an ARM Template

### 3.1 Instructions

1. Quisque dictum convallis metus, vitae vestibulum turpis dapibus non.
  1. Suspendisse commodo tempor convallis.
  2. Nunc eget quam facilisis, imperdiet felis ut, blandit nibh.
  3. Phasellus pulvinar ornare sem, ut imperdiet justo volutpat et.
2. Class aptent taciti sociosqu ad litora torquent per conubia nostra, per inceptos himenaeos.
3. Vestibulum hendrerit orci urna, non aliquet eros eleifend vitae.
4. Curabitur nibh dui, vestibulum cursus neque commodo, aliquet accumsan risus.

Sed at malesuada orci, eu volutpat ex
5. In ac odio vulputate, faucibus lorem at, sagittis felis.
6. Fusce tincidunt sapien nec dolor congue facilisis lacinia quis urna.

**Note:** Ut feugiat est id ultrices gravida.
7. Phasellus urna lacus, luctus at suscipit vitae, maximus ac nisl.
  - Morbi in tortor finibus, tempus dolor a, cursus lorem.
  - Maecenas id risus pharetra, viverra elit quis, lacinia odio.
  - Etiam rutrum pretium enim.
8. Curabitur in pretium urna, nec ullamcorper diam.

## 4 Module 01-Lab 1: Configure SharePoint sites

### 4.1 Microsoft 365 user interface

Given the dynamic nature of Microsoft cloud tools, you may experience user interface (UI) changes that were made following the development of this training content. This will manifest itself in UI changes that do not match up with the detailed instructions presented in this lab manual.

The Microsoft World-Wide Learning team will update this training course as soon as any such changes are brought to our attention. However, given the dynamic nature of cloud updates, you may run into UI changes before this training content is updated. **If this occurs, you will have to adapt to the changes and work through them in the lab exercises as needed.**

## 4.2 Lab Scenario

You are the SharePoint Administrator for Adatum Corporation. The company built a new project business unit and requested to provision associated sites. In this lab, you will create new SharePoint sites and associate the site to a hub site.

- **Exercise 1: Create SharePoint sites**
  - Task 1: Create a team site from a browser
  - Task 2: Create a communication site from PowerShell
- **Exercise 2: Configure a hub site**
  - Task 1: Register the site as a hub site
  - Task 2: Design the hub site
  - Task 3: Associates a site with the hub site

## 4.3 Objectives

After you complete this lab, you will be able to:

- Create new SharePoint sites using browser
- Create new SharePoint sites using PowerShell
- Configure hub site for SharePoint sites

## 4.4 Lab Setup

- **Estimated Time:** 25 minutes.

## 4.5 Instructions

### 4.6 Before you start

#### 4.6.1 1. Review the lab virtual machines

The following is the virtual machine provided in this course. You will log in to the VM as a local administrator. The instructor will provide the sign-in information.

- VM 1: a stand-alone Windows 10 client virtual machine with Office 2019 installed.

#### 4.6.2 2. Review Microsoft 365 tenant

Once you launch the VM, a free trial tenant will be made available to you. The following are the details about the Microsoft 365 tenant:

- Microsoft 365 E5.
- 20 licenses and pre-assigned (20 assigned of 20 total).
- One Global Administrator (MOD Administrator) and nineteen normal users have been pre-created.
- Global Administrator (MOD Administrator) is **admin@YourTenant.onmicrosoft.com**.

**Note:** **YourTenant.onmicrosoft.com** is the domain associated with the Microsoft 365 tenant provided by the lab hosting provider. **YourTenant** is the unique tenant ID and different to each student.

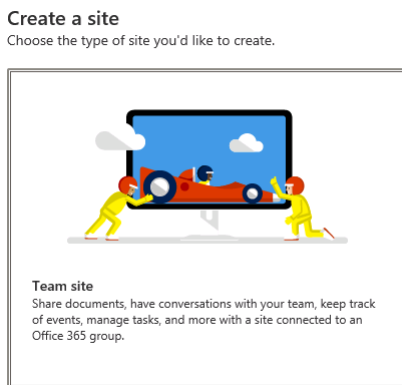
## 4.7 Exercise 1: Create SharePoint sites

### 4.7.1 Task 1: Create a team site from a browser

In this task you will create a new SharePoint team site for a new project team named Aurora. The team site will associate with a Microsoft 365 group.

1. Log on to **LON-CL1** virtual machine as the local administrator (Adatum\administrator).
2. Open **Edge** and browse to <https://portal.office.com>.
3. Sign in to Microsoft 365

- You should be presented a sign in dialog box, if you are directed to the page instead, select **Sign In** from the upper right of the page. If you are presented the sign in dialog box, **copy and paste the M365 Credential Username** into the box presented, select **Next**.
  - In the next screen, **copy and paste the M365 Credential Password** into the box presented, select **Sign In**.
  - When it asks if you would like to **Stay signed in?** then select **Yes** to stay signed in.
4. In the Microsoft 365 landing page, select **Admin** to access **Microsoft 365 admin center**.
  5. In the Microsoft 365 admin center, select **Show all** in the left pane, and select **SharePoint** to access **SharePoint admin center**.
  6. In the SharePoint admin center, expand **Sites**, and select **Active sites**.
  7. Select **+Create** from the menu in the middle pane.
  8. Select **Team site** in the new window.



9. Fill out the following site information and select **Finish** to complete the site creation.
  - **Site name:** Aurora
  - **Site owner:** Alex Wibler, Admin
  - **Site members:** Vicky Abbott, Jon Friday
  - **Language:** English
  - **Privacy settings:** Private
  - **Site description:** This is the site for the new project team -Aurora.

You have now created a new team site: <https://YourTenant.sharepoint.com/sites/Aurora>.

#### 4.7.2 Task 2: Create a communication site from PowerShell

In this task you will install, check, and use SharePoint Online Management Shell module to create a new SharePoint communication site to become the hub site for the new project business unit hosting latest news and information for the unit.

1. Log on to **LON-CL1** virtual machine as the local administrator (Adatum\administrator).
2. Open **Edge** and browse to [SharePoint Online Management Shell module download page](#).
3. Select **Download** and choose x64 version to install the module. .
4. Accept the agreement and follow the installation process.
5. Open **Windows PowerShell**.
6. Connect to **SharePoint Online Service** by running the following command in the PowerShell window. Please replace the **YourTenant** to the one you have. Enter the password while got prompt for credential.

```
$adminUPN="admin@<YourTenant>.onmicrosoft.com"
$orgName="<YourTenant>"
$userCredential = Get-Credential -UserName $adminUPN -Message "Type the password."
Connect-SPOService -Url https://$orgName-admin.sharepoint.com -Credential $userCredential
```

- Run the following command to view the available site template. From the output, we know the name for the communication site is SITEPAGEPUBLISHING#0.

#### Get-SPOWebTemplate

```
PS C:\Users\administrator.ADATUM> get-spowebtemplate
```

Name	Title	LocaleId	CompatibilityLevel
----	----	-----	-----
STS#3	Team site (no Office 365 group)	1033	15
STS#0	Team site (classic experience)	1033	15
BLOG#0	Blog	1033	15
DOC#0	Document Center	1033	15
DEV#0	Developer Site	1033	15
OFFICE#1	Records Center	1033	15
EHS#1	Team Site - SharePoint Online configuration	1033	15
BICenterSite#0	Business Intelligence Center	1033	15
SRCHCEN#0	Enterprise Search Center	1033	15
BLANKINTERNETCONTAINER#0	Publishing Portal	1033	15
ENTERWIKI#0	Enterprise Wiki	1033	15
PROJECTSITE#0	Project Site	1033	15
PRODUCTCATALOG#0	Product Catalog	1033	15
COMMUNITY#0	Community Site	1033	15
COMMUNITYPORTAL#0	Community Portal	1033	15
SITEPAGEPUBLISHING#0	Communication site	1033	15
SRCHCENTERLITE#0	Basic Search Center	1033	15
Visprus#0	Visio Process Repository	1033	15

- Run the following command to create a new communication site named Project Hub with Admin@<YourTenant>.onmicrosoft.com as the site owner.

New-SPOSite -Url <https://<YourTenant>.sharepoint.com/sites/ProjectHub> -Owner admin@<YourTenant>.onmicrosoft.com

You have now created a new team site: <https://YourTenant.sharepoint.com/sites/ProjectHub>.

## 4.8 Exercise 2: Configure a hub site

### 4.8.1 Task 1: Register the site as a hub site

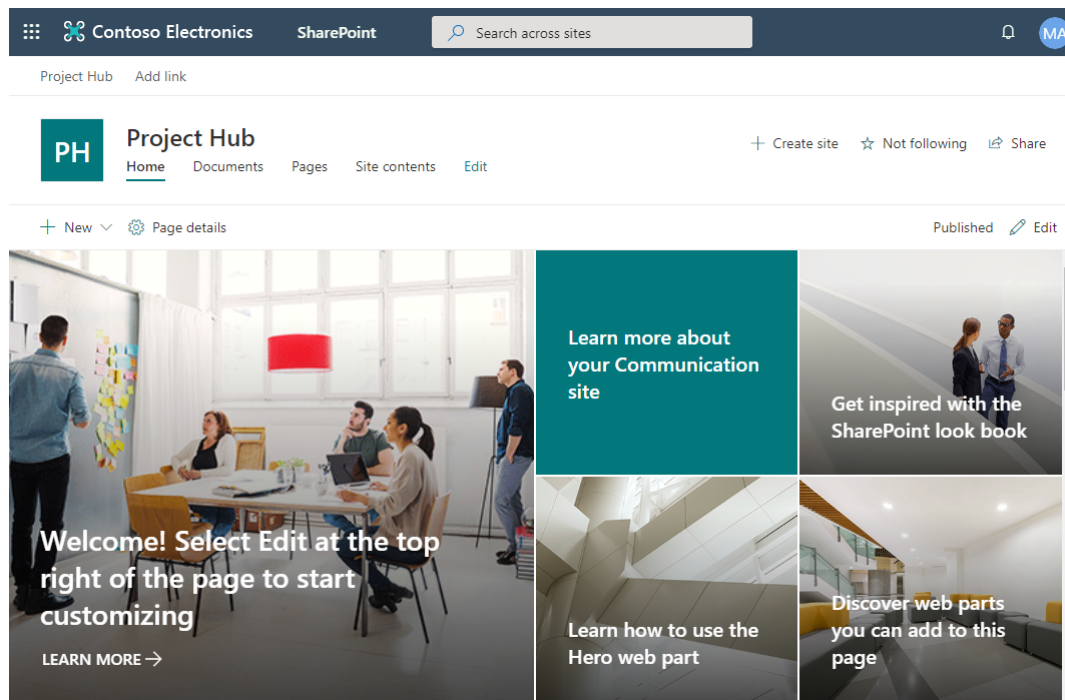
- Log on to **LON-CL1** virtual machine as the local administrator (Adatum\administrator).
- Open **Edge** and browse to SharePoint admin center (<https://<YourTenant>-admin.sharepoint.com>) with your Microsoft 365 admin credential.
- Expand **Sites** and select **Active sites**.
- Select the Project Hub site (<https://YourTenant.sharepoint.com/sites/ProjectHub>).
- Select **Hub**, and then select **Register as hub site** from the dropdown menu.
- Enter the following information in the new window, and select **Save**.
  - Hub name: Project Hub
  - People who can associate sites with this hub: Admin@<YourTenant>.onmicrosoft.com.

You can also use the following command to achieve the same goal.

Register-SPOHubSite <https://<YourTenant>.sharepoint.com/sites/ProjectHub>

### 4.8.2 Task 2: Design the hub site

- Open Edge** and browse to the Project Hub site (<https://YourTenant.sharepoint.com/sites/ProjectHub>), you should see the hub navigation bar at the top of the page.



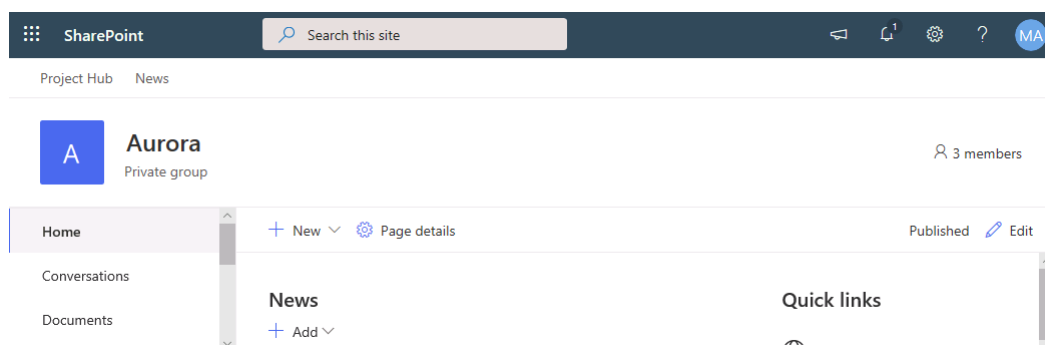
## 2. Select **Add link** and fill out following information, then **Save**.

- Address: <https://<YourTenant>.sharepoint.com/sites/News>
- Display name: News

You can see the new link shows up at the hub navigation bar.

### 4.8.3 Task 3: Associates a site with the hub site

1. Log on to **LON-CL1** virtual machine as the local administrator (Adatum\administrator).
2. Open **Edge** and browse to SharePoint admin center (<https://<YourTenant>-admin.sharepoint.com>) with your Microsoft 365 admin credential.
3. Expand **Sites** and select **Active sites**.
4. Select the Aurora team site (<https://YourTenant.sharepoint.com/sites/Aurora>).
5. Select **Hub**, and then select **Associate with a hub** from the dropdown menu.
6. In the **Edit hub association** window, select **Project Hub** in the dropdown menu and **Save**.
7. Browse to **Aurora team site**, you can see the hub navigation bar shows up at the top of the page.



You can also use the following command to achieve the same goal.

Add-SPOHubSiteAssociation <https://YourTenant.sharepoint.com/sites/Aurora> -HubSite <https://YourTenant.sharepoint.com/sites/News>

END OF LAB



## 5 Module 02-Lab 1: Manage OneDrive

### 5.1 Microsoft 365 user interface

Given the dynamic nature of Microsoft cloud tools, you may experience user interface (UI) changes that were made following the development of this training content. This will manifest itself in UI changes that do not match up with the detailed instructions presented in this lab manual.

The Microsoft World-Wide Learning team will update this training course as soon as any such changes are brought to our attention. However, given the dynamic nature of cloud updates, you may run into UI changes before this training content is updated. **If this occurs, you will have to adapt to the changes and work through them in the lab exercises as needed.**

### 5.2 Lab Scenario

You are the SharePoint Administrator for Adatum Corporation. The company wants to block certain file types been synced and restrict users to share files in OneDrive with people outside the organization. In the labs of this module, you will configure certain aspects of the OneDrive sync app and set service parameters in the OneDrive admin center.

- **Exercise 1: Manage OneDrive settings**
  - Task 1: Set storage quota for all users
  - Task 2: Restrict file types from being synced
  - Task 3: Set sharing limits

### 5.3 Objectives

After you complete this lab, you will be able to:

- Set storage quota for all users
- Limit certain file types from syncing
- Configure limits on sharing

### 5.4 Lab Setup

- **Estimated Time:** 30 minutes.

### 5.5 Instructions

#### 5.5.1 Before you start

#### 5.5.2 1. Review the lab virtual machines

The following is the virtual machine provided in this course. You will log in to the VM as a local administrator. The instructor will provide the sign-in information.

- VM 1: a stand-alone Windows 10 client virtual machine with Office 2019 installed.

#### 5.5.3 2. Review Microsoft 365 tenant

Once you launch the VM, a free trial tenant will be made available to you. The following are the details about the Microsoft 365 tenant:

- Microsoft 365 E5.
- 20 licenses and pre-assigned (20 assigned of 20 total).
- One Global Administrator (MOD Administrator) and nineteen normal users have been pre-created.
- Global Administrator (MOD Administrator) is **admin@YourTenant.onmicrosoft.com**.

**Note:** **YourTenant.onmicrosoft.com** is the domain associated with the Microsoft 365 tenant provided by the lab hosting provider. **YourTenant** is the unique tenant ID and different to each student.

## 5.6 Exercise 1: Manage OneDrive settings

In this exercise you will complete multiple administrative tasks. You will assign all users to have a storage limit of 2TB, restrict certain file types from being synced and set limits on sharing. These administrative changes would be done typically prior to roll out of the sync app to users.

### 5.6.1 Task 1: Set storage quota for all users

In this task, you will check the current storage quota for all users and then change to 2TB.

1. Log on to **LON-CL1** virtual machine as the local administrator (Adatum\administrator).
2. Open **Edge** and browse to <https://portal.office.com>.
3. Sign in to Microsoft 365
  1. You should be presented a sign in dialog box, if you are directed to the page instead, select **Sign In** from the upper right of the page. If you are presented the sign in dialog box, **copy and paste the M365 Credential Username** into the box presented, select **Next**.
  2. In the next screen, **copy and paste the M365 Credential Password** into the box presented, select **Sign In**.
  3. When it asks if you would like to **Stay signed in?** then select **Yes** to stay signed in.
4. In the Microsoft 365 landing page, select **Admin** to access **Microsoft 365 admin center**.
5. In the Microsoft 365 admin center, select **Show all > All admin centers** in the left pane, and select **OneDrive** to access **OneDrive admin center** (<https://admin.onedrive.com/>).
6. Select **Storage** in the left navigation menu. This will open the storage setting page.

Contoso Electronics OneDrive

Home  
Sharing  
Sync  
**Storage**  
Device access  
Compliance  
Notifications  
Data migration

## Storage

Use these settings to specify storage limits for all users and retention for deleted users.

Default storage in GB

2048

[What's the maximum for my Office 365 plan?](#)

Days to retain files in OneDrive after a user account is marked for deletion

30

Save

7. Note that the current storage quota is set to 1024 GB (1 TB). Change the value to **2048**.
8. Select the **Save** on the Storage page to confirm the changes.

You have successfully changed the storage quota for all new users to 2 TB. Continue with the next task.

### 5.6.2 Task 2: Restrict file types from being synced

You need to restrict the sync client so that large files such as videos are not being synced. In this task you will add restrictions so that common video file formats are not synced.

1. From the OneDrive admin center select **Sync** in the left navigation pane. This will open the sync settings page.
2. Select the box for **Block syncing of specific file types**.
3. In the text box enter the file extensions as shown below. Do not enter any punctuation such as a period with the entry. Enter each on its own line.
  - MP4
  - WMV
  - MKV
  - MOV
  - AVI

Contoso Electronics OneDrive

Home  
Sharing  
**Sync**  
Storage  
Device access  
Compliance  
Notifications  
Data migration

## Sync

Use these settings to control syncing of files in OneDrive and SharePoint.  
[Download the sync client](#)  
[Fix sync problems](#)

☒ Show the Sync button on the OneDrive website

☐ Allow syncing only on PCs joined to specific domains

☒ Block syncing of specific file types

Enter each file extension on a new line.

MP4  
WMV  
MKV

Save

4. Select **Save** on the sync page to save the changes.

You have successfully blocked the required file formats from being sync'd with your tenant. You have finished this task and you can continue to the next one.

### 5.6.3 Task 3: Set sharing limits

In this task you will need to set the default link type and with whom users can share externally.

1. From the OneDrive admin center select **Sharing** in the left navigation pane. This will open the Sharing settings page.
2. Under the Links section select **Internal: Only people in your organization**.
3. Under the External sharing section move the slider under OneDrive to **Only people in your organization**.

Contoso Electronics

OneDrive

Home

Sharing

Sync

Storage

Device access

Compliance

Notifications

Data migration

## Sharing

Use these settings to customize how sharing works in OneDrive and SharePoint.

[Learn more about external sharing](#)

---

### Links

Choose the kind of link that's selected by default when users share items.

**Default link type**

☐ Shareable: Anyone with the link  
☒ Internal: Only people in your organization  
☐ Direct: Specific people

**Advanced settings for shareable links** ▾

---

### External sharing

Users can share with:

☒ SharePoint
 ☐ OneDrive

Most permissive

Least permissive

Anyone

Users can create shareable links that don't require sign-in.

New and existing external users

External users must sign in.

Existing external users

Only users already in your organization's directory.

Only people in your organization

No external sharing allowed.

Your sharing setting for OneDrive can't be more permissive than your setting for SharePoint.

4. Select **Save** on the Sharing page to save the changes.

You have now successfully set the sharing controls per requirements. You have completed this exercise.

END OF LAB

## 6 Module 03-Lab 1: Manage sharing

### 6.1 Microsoft 365 user interface

Given the dynamic nature of Microsoft cloud tools, you may experience user interface (UI) changes that were made following the development of this training content. This will manifest itself in UI changes that do not match up with the detailed instructions presented in this lab manual.

The Microsoft World-Wide Learning team will update this training course as soon as any such changes are brought to our attention. However, given the dynamic nature of cloud updates, you may run into UI changes before this training content is updated. **If this occurs, you will have to adapt to the changes and work through them in the lab exercises as needed.**

## 6.2 Lab Scenario

You are the SharePoint Administrator for Adatum Corporation. The company has a partnership with LitwareInc and NorthWind and requests to enable content sharing with those vendors. In this lab, you will enable external sharing and update the site permission for the US Sales site, which contains confidential content.

- **Exercise 1: Enable external sharing**
  - Task 1: Change the sharing options
  - Task 2: Limit external sharing by domain
- **Exercise 2: Manage sharing for a site**
  - Task 1: Change the sharing options for a site

## 6.3 Objectives

After you complete this lab, you will be able to:

- Allow or block sharing content from SharePoint or OneDrive
- Customize sharing settings for a site

## 6.4 Lab Setup

- **Estimated Time:** 30 minutes.

## 6.5 Instructions

### 6.5.1 Before you start

#### 6.5.2 1. Review the lab virtual machines

The following is the virtual machine provided in this course. You will log in to the VM as a local administrator. The instructor will provide the sign-in information.

- VM 1: a stand-alone Windows 10 client virtual machine with Office 2019 installed.

#### 6.5.3 2. Review Microsoft 365 tenant

Once you launch the VM, a free trial tenant will be made available to you. The following are the details about the Microsoft 365 tenant:

- Microsoft 365 E5.
- 20 licenses and pre-assigned (20 assigned of 20 total).
- One Global Administrator (MOD Administrator) and nineteen normal users have been pre-created.
- Global Administrator (MOD Administrator) is [admin@YourTenant.onmicrosoft.com](mailto:admin@YourTenant.onmicrosoft.com).

**Note:** **YourTenant**.onmicrosoft.com is the domain associated with the Microsoft 365 tenant provided by the lab hosting provider. **YourTenant** is the unique tenant ID and different to each student.

## 6.6 Exercise 1: Enable external sharing

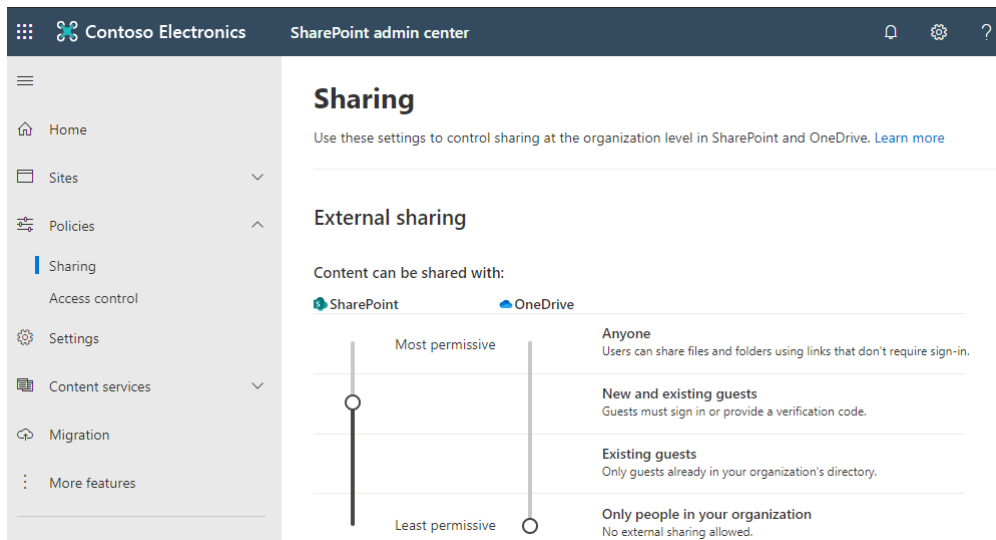
In this exercise, you will enable external sharing to the user in the following domains for the new partnership:

- LitwareInc.com
- NorthWind.com

### 6.6.1 Task 1: Change the sharing options

1. Log on to **LON-CL1** virtual machine as the local administrator (Adatum\administrator).
2. Open **Edge** and browse to SharePoint admin center (<https://<YourTenant>-admin.sharepoint.com>) with your Microsoft 365 admin credential.
3. Expand **Policies** and select **Sharing**.
4. Under the External sharing section move the slider under SharePoint to **New and existing guests**.

5. Expand **More external sharing settings**.

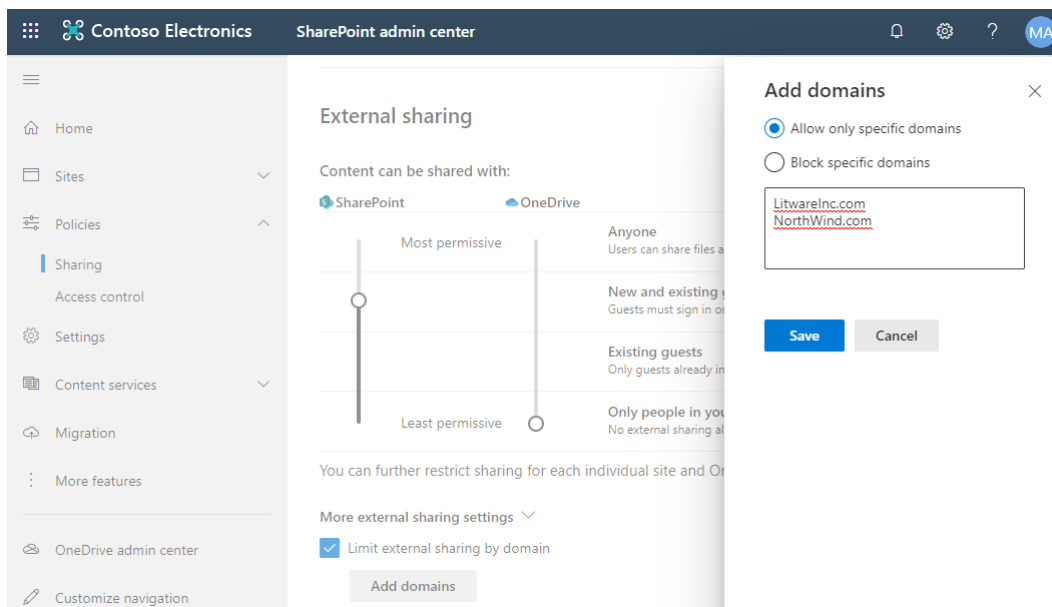


**6.6.2 Task 2: Limit external sharing by domain**

1. From the SharePoint admin center, expand **Policies** and select **Sharing**.
2. Under **External sharing** section, expand **More external sharing settings**.
3. Select **Limit external sharing by domain**.
4. Select **Add domains** button.
5. In the new window, select **Allow only specific domains**.
6. Enter the following domains in the text box and select **Save**.

LitwareInc.com

NorthWind.com



7. You will see the allowed domains updated in the SharePoint admin center.

More external sharing settings ▾

☒ Limit external sharing by domain

Allowed domains: litwareinc.om,northwind.com

Add domains

8. Scroll down to the bottom of the settings page and select **Save**.

## 6.7 Exercise 2: Manage sharing for a site

In this exercise, you will update the sharing settings for the US Sales site to protect the confidential data being shared with people outside the organization.

### 6.7.1 Task 1: Change the sharing options for a site

1. Log on to **LON-CL1** virtual machine as the local administrator (Adatum\administrator).
2. Open **Edge** and browse to SharePoint admin center (<https://<YourTenant>-admin.sharepoint.com>) with your Microsoft 365 admin credential.
3. Expand **Sites** and select **Active sites**.
4. Select the **U.S. Sales site** (<https://YourTenant.sharepoint.com/sites/USSales>).
5. In the new window, select **Policies** tab.
6. Select **Edit** under External sharing.
7. In the new window, select **Only people in your organization**.
8. Select **Save**.

END OF LAB

## 7 Module 04-Lab 1: Manage User Profiles and Apps

### 7.1 Microsoft 365 user interface

Given the dynamic nature of Microsoft cloud tools, you may experience user interface (UI) changes that were made following the development of this training content. This will manifest itself in UI changes that do not match up with the detailed instructions presented in this lab manual.

The Microsoft World-Wide Learning team will update this training course as soon as any such changes are brought to our attention. However, given the dynamic nature of cloud updates, you may run into UI changes before this training content is updated. **If this occurs, you will have to adapt to the changes and work through them in the lab exercises as needed.**

### 7.2 Lab Scenario

In the labs of this course you will need to add a custom property to the SharePoint User Profile service and edit a property. You will also need to configure an app catalog for the tenant.

- **Exercise 1: Manage user profiles**
  - Task 1: Create a custom user profile property
  - Task 2: Edit a user profile property
- **Exercise 2: Manage apps**
  - Task 1: Create an App Catalog site

## 7.3 Objectives

After you complete this lab, you will be able to:

- Create custom user properties
- Edit the value for a user profile property
- Create a new app catalog for a tenant

## 7.4 Lab Setup

- **Estimated Time:** 40 minutes.

## 7.5 Instructions

### 7.5.1 Before you start

#### 7.5.2 1. Review the lab virtual machines

The following is the virtual machine provided in this course. You will log in to the VM as a local administrator. The instructor will provide the sign-in information.

- VM 1: a stand-alone Windows 10 client virtual machine with Office 2019 installed.

#### 7.5.3 2. Review Microsoft 365 tenant

Once you launch the VM, a free trial tenant will be made available to you. The following are the details about the Microsoft 365 tenant:

- Microsoft 365 E5.
- 20 licenses and pre-assigned (20 assigned of 20 total).
- One Global Administrator (MOD Administrator) and nineteen normal users have been pre-created.
- Global Administrator (MOD Administrator) is [admin@YourTenant.onmicrosoft.com](mailto:admin@YourTenant.onmicrosoft.com).

**Note:** [YourTenant.onmicrosoft.com](mailto:YourTenant.onmicrosoft.com) is the domain associated with the Microsoft 365 tenant provided by the lab hosting provider. **YourTenant** is the unique tenant ID and different to each student.

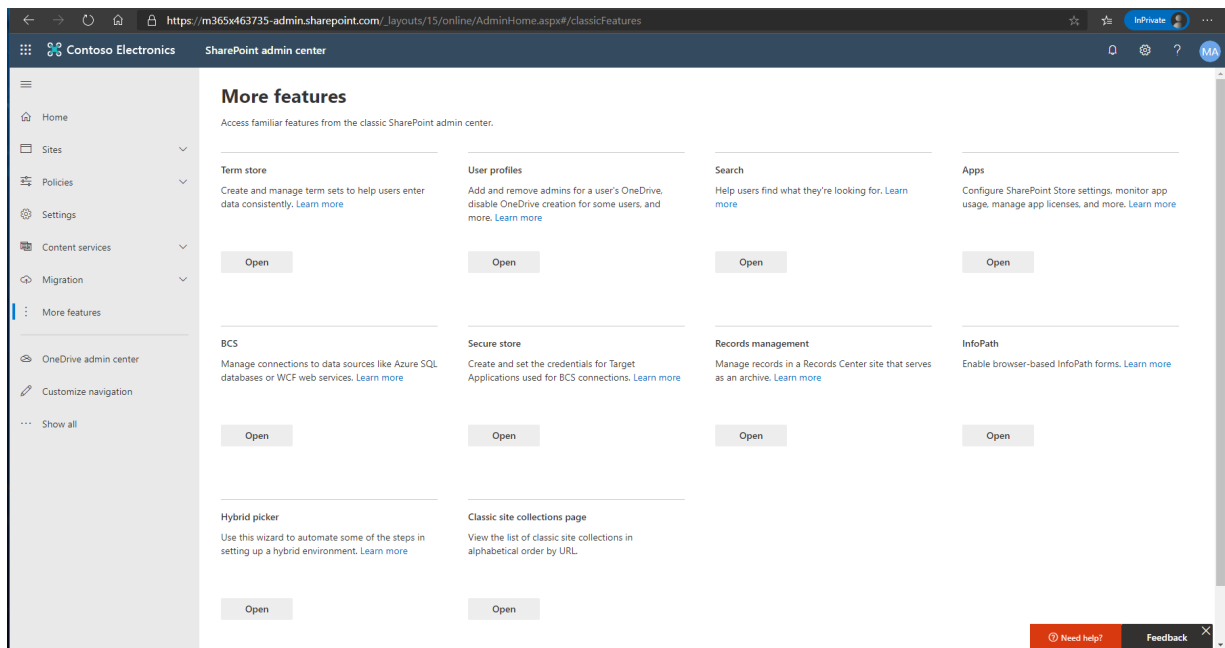
## 7.6 Exercise 1: Manage user profiles

In this exercise you will create a custom property that will be applied to user profiles in the tenant.

### 7.6.1 Task 1: Create a custom user profile property

1. Log on to **LON-CL1** virtual machine as the local administrator (Adatum\administrator).
2. Open **Edge** and browse to SharePoint admin center (<https://<YourTenant>-admin.sharepoint.com>) with your Microsoft 365 admin credential.
3. In the left navigation pane, select **More features**. The More features landing page will be presented.





4. In the More features page, select **Open** under **User Profiles**. You will now be on the User Profiles management page.
5. Select **Manage User Properties**.
6. Select **New Property** to open the new property page.
7. Fill out the following property information and select **OK** to complete the creation.
  - **Name:** Favorite foods
  - **Display Name:** Favorite foods
  - **Type:** String
  - **Policy Settings:** Optional
  - **Default Privacy Setting:** Everyone
  - Select **User can override**
  - Select **Allow users to edit values for this property**
  - Select **Show in the profile properties section of the user's profile page**
  - Select **Show on the Edit Details page**
  - Select **Show updates to the property in newsfeed**
  - Leave other settings as default

You have successfully created a new user profile property that is now available to all users.

### 7.6.2 Task 2: Edit a user profile property

1. Log on to **LON-CL1** virtual machine as the local administrator (Adatum\administrator).
2. Open **Edge** and browse to SharePoint admin center (<https://<YourTenant>-admin.sharepoint.com>) with your Microsoft 365 admin credential.
3. In the left navigation pane, select **More features**.
4. In the More features page, select **Open** under **User Profiles**. You will now be on the User Profiles management page.
5. Select **Manage User Profiles**.
6. Enter **Adele Vance** in the Find profiles text box and select **Find**.
7. Select on the search result of the user and select **Edit my profile**.
8. In the edit profile page, scroll to the bottom of the page and locate the custom property (Favorite foods) just created.
9. Type **Mango** in the text box and select **Save and Close**.

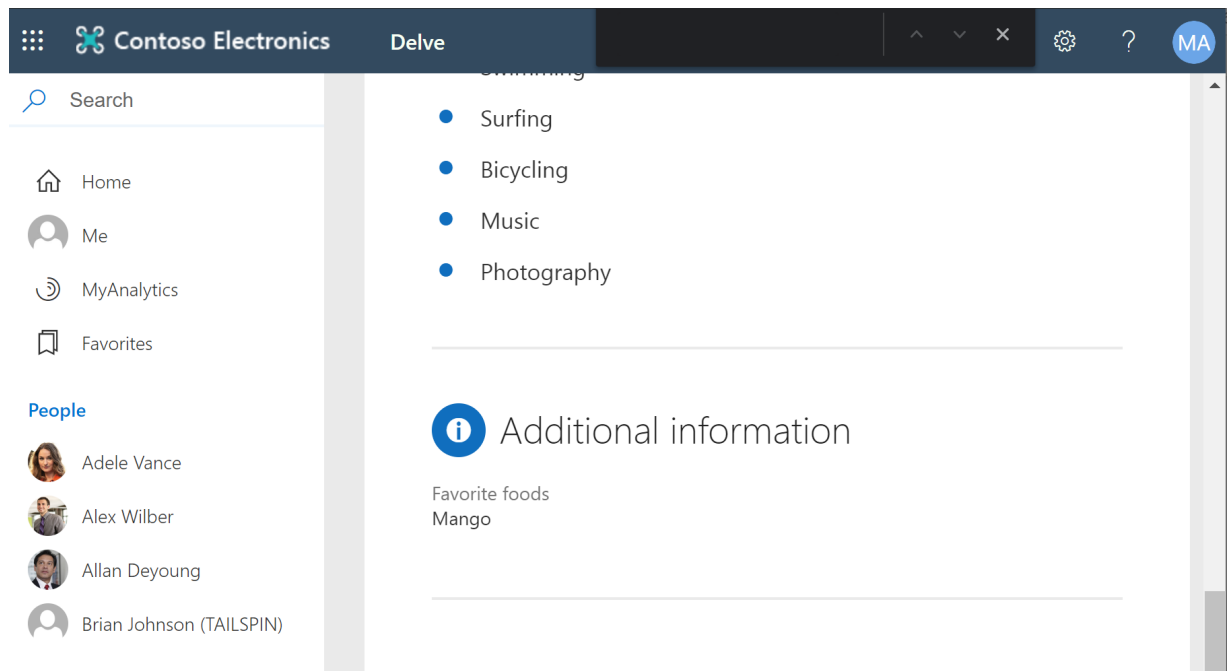
Favorite foods:

Mango

Everyone

 Save and Close |  Cancel and Go Back

10. You can browse to **Adele Vance's** profile page and see the new profile property show up in the page.



You have now completed the actions of modifying the user's profile. This update will now be visible to people when searching for and viewing the user's profile.

## 7.7 Exercise 2: Manage apps

In this exercise you will create a new App Catalog site that will be used by the tenant. This will permit users to be able to install custom apps.

### 7.7.1 Task 1: Create an App Catalog site

1. Log on to **LON-CL1** virtual machine as the local administrator (Adatum\administrator).
2. Open **Edge** and browse to SharePoint admin center (<https://<YourTenant>-admin.sharepoint.com>) with your Microsoft 365 admin credential.
3. In the left navigation pane, select **More features**.
4. In the More features page, select **Open** under **Apps**.
5. Select **App Catalog**.
6. Select **Create a new app catalog site** and select **OK**.
7. Fill out the following site information and select **OK** to complete the creation.
  - **Title:** App Catalog
  - **Web Site Address:**
  - **Administrator:** admin@<YourTenant>.onmicrosoft.com

You have now successfully created a new app catalog for your tenant. You have finished this exercise.

END OF LAB

## 8 Module 05-Lab 1: Manage term set

### 8.1 Microsoft 365 user interface

Given the dynamic nature of Microsoft cloud tools, you may experience user interface (UI) changes that were made following the development of this training content. This will manifest itself in UI changes that do not match up with the detailed instructions presented in this lab manual.

The Microsoft World-Wide Learning team will update this training course as soon as any such changes are brought to our attention. However, given the dynamic nature of cloud updates, you may run into UI changes before this training content is updated. **If this occurs, you will have to adapt to the changes and work through them in the lab exercises as needed.**

### 8.2 Lab Scenario

In the labs of this course you will manage the term set and use it on your content.

- **Exercise 1: Import a term set**
  - Task 1: Assign Term Store Administrator
  - Task 2: Import a term set
- **Exercise 2: Apply the term set to a library column**
  - Task 1: Create a Managed Metadata column
  - Task 2: Update the value of the Managed Metadata column

### 8.3 Objectives

After you complete this lab, you will be able to:

- Manage a term set
- Import a term set using a csv file
- Create a column in a SharePoint library
- Assign a metadata value based on the term set to a document

### 8.4 Lab Setup

- **Estimated Time:** 30 minutes.

### 8.5 Instructions

#### 8.5.1 Before you start

#### 8.5.2 1. Review the lab virtual machines

The following is the virtual machine provided in this course. You will log in to the VM as a local administrator. The instructor will provide the sign-in information.

- VM 1: a stand-alone Windows 10 client virtual machine with Office 2019 installed.

#### 8.5.3 2. Review Microsoft 365 tenant

Once you launch the VM, a free trial tenant will be made available to you. The following are the details about the Microsoft 365 tenant:

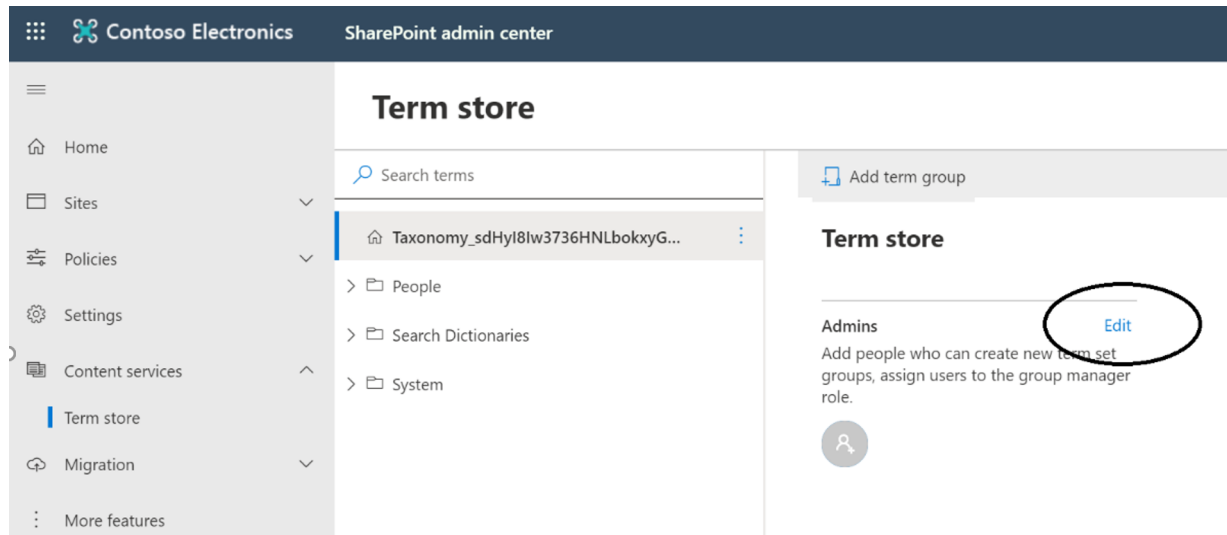
- Microsoft 365 E5.
- 20 licenses and pre-assigned (20 assigned of 20 total).
- One Global Administrator (MOD Administrator) and nineteen normal users have been pre-created.
- Global Administrator (MOD Administrator) is [admin@YourTenant.onmicrosoft.com](mailto:admin@YourTenant.onmicrosoft.com).

**Note:** [YourTenant.onmicrosoft.com](mailto:admin@YourTenant.onmicrosoft.com) is the domain associated with the Microsoft 365 tenant provided by the lab hosting provider. **YourTenant** is the unique tenant ID and different to each student.

## 8.6 Exercise 1: Import a term set

### 8.6.1 Task 1: Assign Term Store Administrator

1. Log on to **LON-CL1** virtual machine as the local administrator (Adatum\administrator).
2. Open **Edge** and browse to SharePoint admin center (<https://<YourTenant>-admin.sharepoint.com>) with your Microsoft 365 admin credential.
3. In the left navigation pane, expand **Content Services** and select **Term Store**.
4. In the Term store page, select **Edit** under Admins section.



5. In the Edit term store admins window, enter **admin@YourTenant.onmicrosoft.com**.

## Edit term store admins

Term store admins can create new term set groups, assign users to the group manager role, and manage the working languages for the term store.

Display name ↑

---

Save

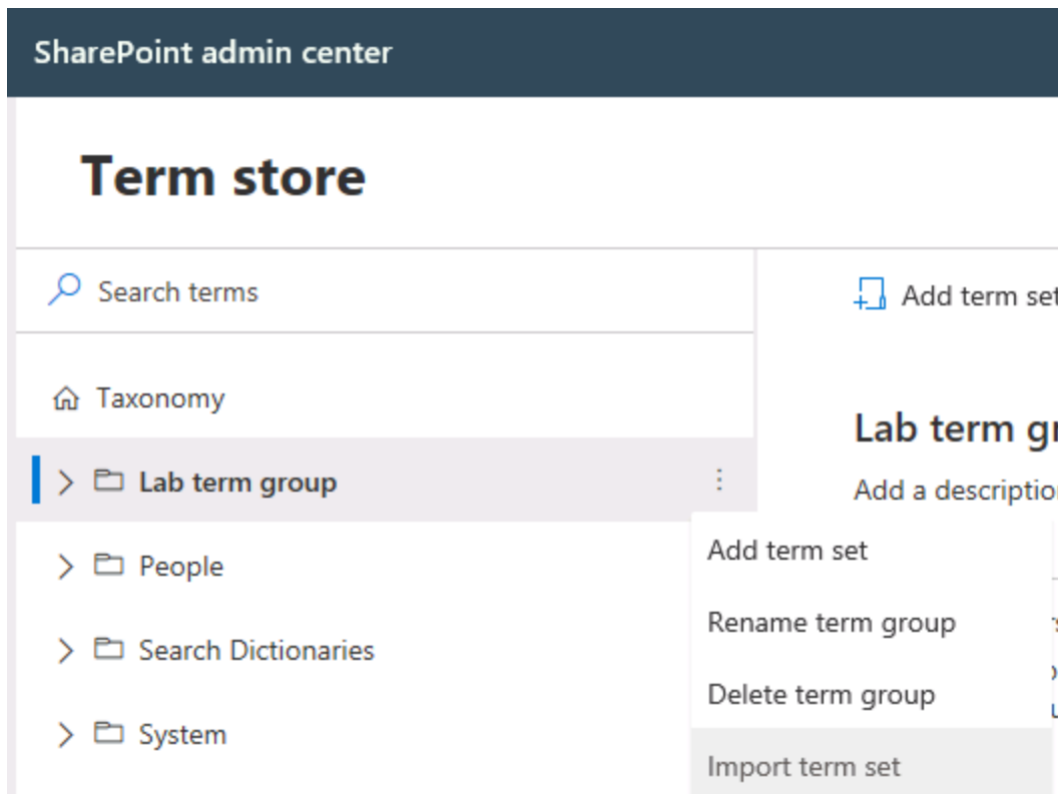
Cancel

6. Select **Save**.

You have successfully added the admin account to the term store administrator role.

### 8.6.2 Task 2: Import a term set

1. Log on to **LON-CL1** virtual machine as the local administrator (Adatum\administrator).
2. Open **Edge** and browse to SharePoint admin center (<https://<YourTenant>-admin.sharepoint.com>) with your Microsoft 365 admin credential.
3. In the left navigation pane, expand **Content Services** and select **Term Store**.
4. In the Term store page, select **Add term group**.
5. Enter **Lab Term Store** in the text box and select **Enter**.
6. Select the ellipsis next to the new term group – **Lab Term Store**.
7. Select **Import term set** from the prompt window.



8. In the Import new term set window, select **Browse** and select the **ImportTermSet.csv** file in the desktop.
9. Select **Import** to import the term set.

You have successfully imported the term set named Political Geography to the Term store.

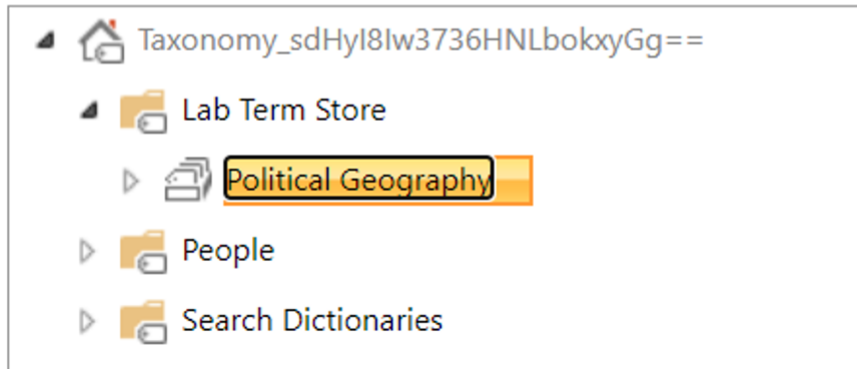
## 8.7 Exercise 2: Apply the term set to a library column

Now we will apply this new loaded term set to a document library.

### 8.7.1 Task 1: Create a Managed Metadata column

1. Log on to **LON-CL1** virtual machine as the local administrator (Adatum\administrator).
2. Open **Edge** and browse to the Aurora project site (<https://YourTenant.sharepoint.com/sites/Aurora>) with your Microsoft 365 admin credential.
3. Select **Documents** in the left pane.
4. Select **Add column > More...** in menu of middle pane.
5. In the **Create Column** page, fill out the following information and select **OK** to create a new library column.
  - **Column name:** Location
  - **Column type:** Managed Metadata
  - **Term Set settings:** Expand the term tree and select **Political geography** term set.
  - Leave other settings as default.

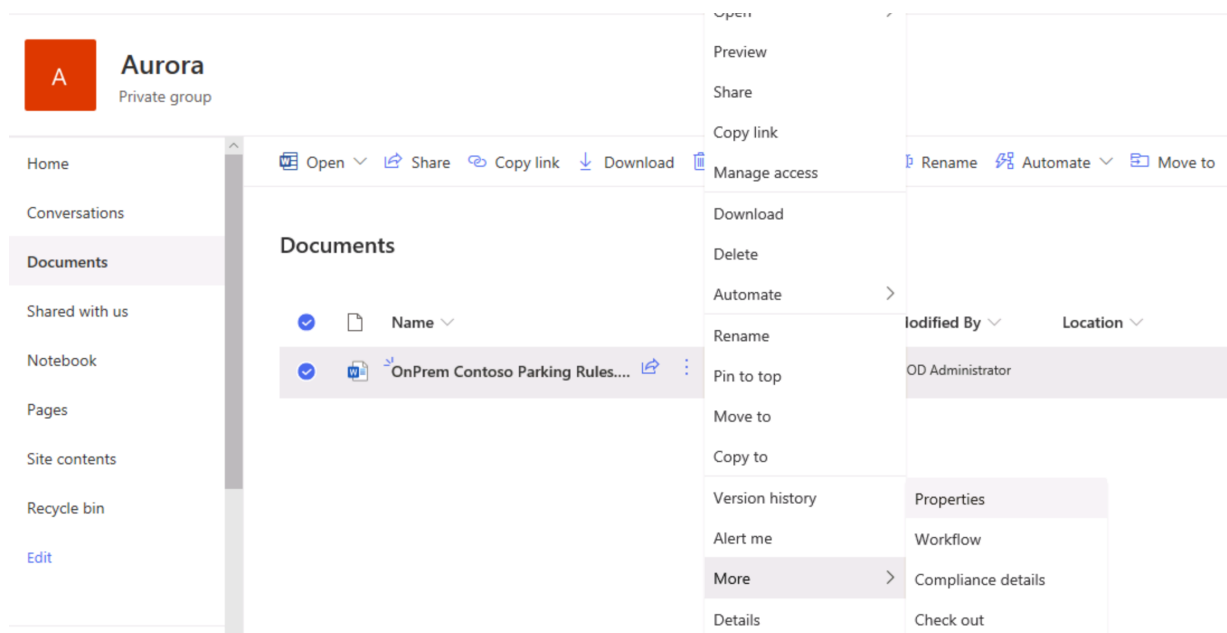
● Use a managed term set:  
Find term sets that include the following terms.



You have successfully created a Managed Metadata column named Location.

### 8.7.2 Task 2: Update the value of the Managed Metadata column

1. Log on to **LON-CL1** virtual machine as the local administrator (Adatum\administrator).
2. Open **Edge** and browse to the document library of the Aurora project site (<https://YourTenant.sharepoint.com/sites/Aurora>) with your Microsoft 365 admin credential.
3. Select **Upload > File** in the ribbon.
4. Upload the **OnPrem Contoso Parking Rules.docx** word file in the **SampleDocument** folder in the desktop.
5. Select the word file.
6. Select the ellipsis next to the file name.
7. In the prompt window, select **More > Properties**.




8. In the new window, select **Enter value here** under **Location**.
9. Enter **Town** in the text box and resolve the term tag. You will notice the message **Saving...** below the text.

## OnPrem Contoso Parking Rules.docx

 Name \*

OnPrem Contoso Parking Rules.docx

 Title

Enter value here

 Location

Town

 Saving...

You have successfully uploaded a word document and update the value of Location column to Town.

END OF LAB

## 9 Module 06-Lab 1: Configure Search

### 9.1 Microsoft 365 user interface

Given the dynamic nature of Microsoft cloud tools, you may experience user interface (UI) changes that were made following the development of this training content. This will manifest itself in UI changes that do not match up with the detailed instructions presented in this lab manual.

The Microsoft World-Wide Learning team will update this training course as soon as any such changes are brought to our attention. However, given the dynamic nature of cloud updates, you may run into UI changes before this training content is updated. **If this occurs, you will have to adapt to the changes and work through them in the lab exercises as needed.**

### 9.2 Lab Scenario

In the labs of this course you will create a new result source to be used in the tenant, alter the location of the search center, and provide reporting.

- **Exercise 1: Configure result source**
  - Task 1: Create a new result source
  - Task 2: Test the search result
- **Exercise 2: Monitor Search**
  - Task 1: Review Search usage reports

### 9.3 Objectives

After you complete this lab, you will be able to:

- Create a new result source
- Export and review search usage reports



## 9.4 Lab Setup

- **Estimated Time:** 40 minutes.

## 9.5 Instructions

### 9.5.1 Before you start

#### 9.5.2 1. Review the lab virtual machines

The following is the virtual machine provided in this course. You will log in to the VM as a local administrator. The instructor will provide the sign-in information.

- VM 1: a stand-alone Windows 10 client virtual machine with Office 2019 installed.

#### 9.5.3 2. Review Microsoft 365 tenant

Once you launch the VM, a free trial tenant will be made available to you. The following are the details about the Microsoft 365 tenant:

- Microsoft 365 E5.
- 20 licenses and pre-assigned (20 assigned of 20 total).
- One Global Administrator (MOD Administrator) and nineteen normal users have been pre-created.
- Global Administrator (MOD Administrator) is [admin@YourTenant.onmicrosoft.com](mailto:admin@YourTenant.onmicrosoft.com).

**Note:** [YourTenant.onmicrosoft.com](mailto:admin@YourTenant.onmicrosoft.com) is the domain associated with the Microsoft 365 tenant provided by the lab hosting provider. **YourTenant** is the unique tenant ID and different to each student.

## 9.6 Exercise 1: Configure result source

In this exercise you will use the SharePoint Admin Center to create a new result source to be used in your tenant. To perform the tasks, you need the default tenant global admin account.

### 9.6.1 Task 1: Create a new result source

1. Log on to **LON-CL1** virtual machine as the local administrator (Adatum\administrator).
2. Open **Edge** and browse to SharePoint admin center (<https://<YourTenant>-admin.sharepoint.com>) with your Microsoft 365 admin credential.
3. In the left navigation pane, select **More features**.
4. In the More features page, select **Open** under **Search**. You will now be on the Search management page.

#### Search

##### Manage Search Schema

Create and modify search properties so that users can query these properties.

##### Manage Search Dictionaries

Create and modify lists of terms which will be used to improve the search experience for your users.

##### Manage Authoritative Pages

Identify high-quality pages that search will use to improve relevance, as well as low-quality pages that search will consider less relevant.

##### Query Suggestion Settings

Show search suggestions as users type in the search box (if not disabled by user).

##### Manage Result Sources

Create and modify sources you can query for results. This includes filtered results from SharePoint as well as results from remote sources such as Bing.

##### Manage Query Rules

Create and modify query rules to promote important results, show blocks of additional results, and even fine-tune ranking.

##### Manage Query Client Types

Create and modify configuration of query client types which are used to identify querying clients so as to prioritize query throttling.

##### Remove Search Results

List URLs you would like to remove from search results until the next crawl.

##### View Usage Reports

See how often your users search, what their top queries are, and which queries they're having trouble getting answers for.

##### Search Center Settings

Tell us where searches should go by specifying the location of your Search Center.

##### Export Search Configuration

Create a file that includes all customized query rules, result sources, result types, ranking models and site search settings but not any that shipped with SharePoint, in the current tenant, that can be imported to other tenants.

##### Import Search Configuration

Import a search configuration file.

##### Crawl Log Permissions

Grant users read access to crawl log information for this tenant

5. Select **Manage Result Sources**.
6. Select **New Result Source** from the ribbon menu.
7. In the new window, fill out the following information and select **Save** to create a new result source.
  - **Name:** Promote Word Document
  - **Query Transform:** {searchTerms} XRANK(cb=100) FileType:docx
  - Leave other settings as default.
8. In the result sources page, select the dropdown menu of the **Promote Word Document** result source.
9. Select **Set as Default** in the prompt window.

#### Defined for this tenant (1)

Promote Word Document

Provided by SharePoint (16)

Conversations

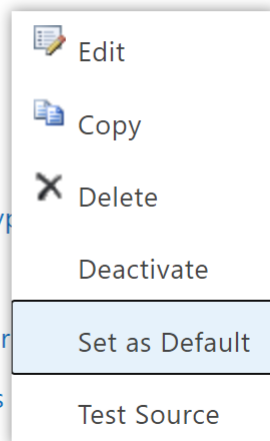
Documents

Items matching a content type

Items matching a tag

Items related to current user

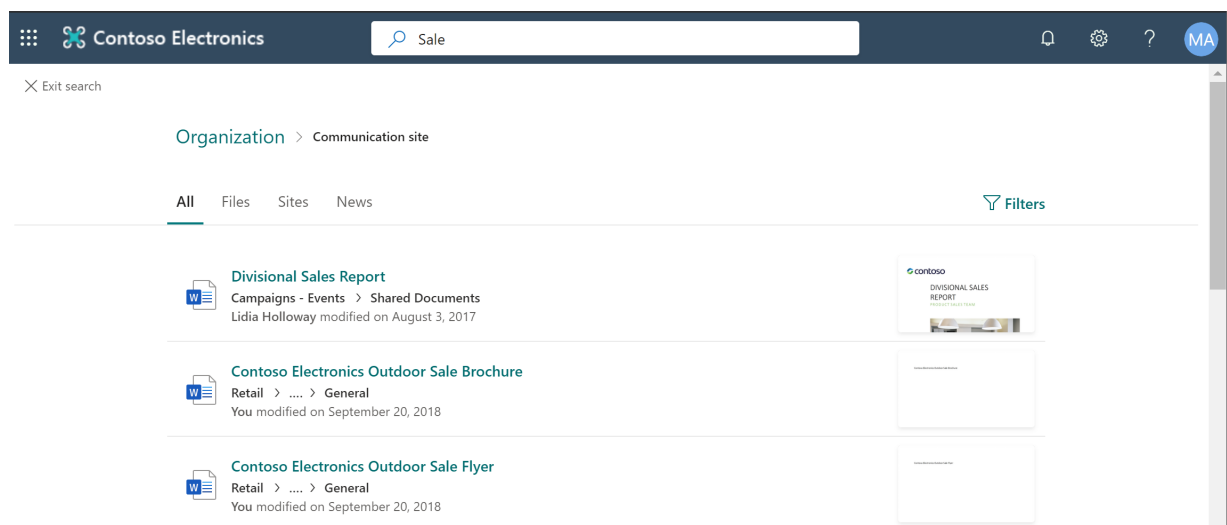
Items with same keyword as



You have successfully created a new result source which promotes the word document to the top of the search result.

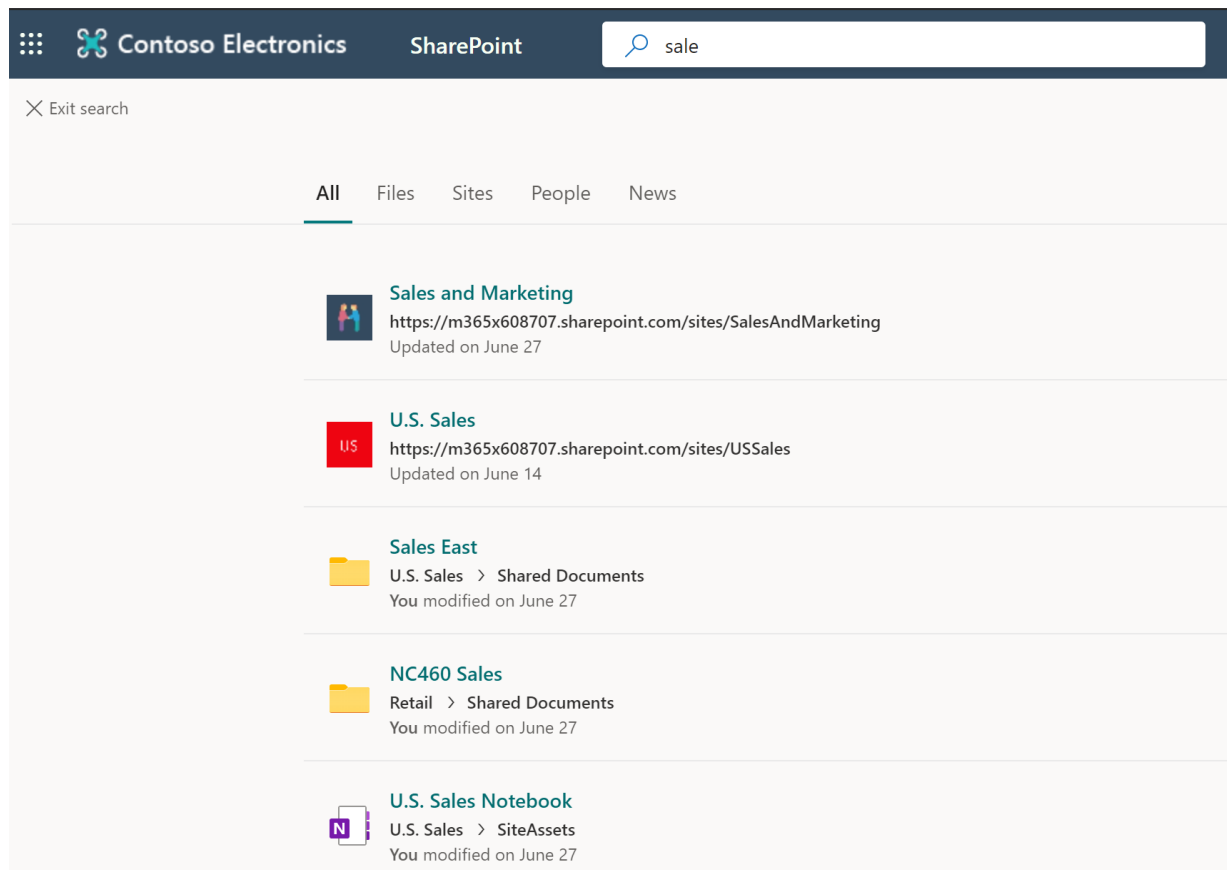
#### 9.6.2 Task 2: Test the search result

1. Log on to **LON-CL1** virtual machine as the local administrator (Adatum\administrator).
2. Open **Edge** and browse to the SharePoint start page () with your Microsoft 365 admin credential.
3. Type **Sale** in the top search box and select **Enter**.
4. Notice the top of the search results are word files.



5. Browse back to SharePoint admin center ().
6. In the left navigation pane, select **More features**.

7. In the More features page, select **Open** under **Search**. You will now be on the Search management page.
8. Select **Manage Result Sources**.
9. select the dropdown menu of the **Local SharePoint Results** result source.
10. Select **Set as Default** in the prompt window.
11. Search the term **sale** in the search box in the SharePoint start page (). Notice the search results are mix file types.



## 9.7 Exercise 2: Monitor Search

In this exercise you will access the search usage reports and download the report files so that they can be provided to other users and management. The request for reports is to show what people are searching for in the tenant.

### 9.7.1 Task 1: Review Search usage reports

1. Log on to **LON-CL1** virtual machine as the local administrator (Adatum\administrator).
2. Open **Edge** and browse to SharePoint admin center (<https://<YourTenant>-admin.sharepoint.com>) with your Microsoft 365 admin credential.
3. In the left navigation pane, select **More features**.
4. In the More features page, select **Open** under **Search**. You will now be on the Search management page.
5. Select **View Usage Reports**.
6. Select **Top Queries by Day** to download the search report.
7. Open and review the search report.

*Reminder: The search reports are processed at daily basis, you might not see any data in the report.*

You have now successfully downloaded the search usage reports. You have finished this exercise.

END OF LAB