LAB 3: Collaboration services in Microsoft 365

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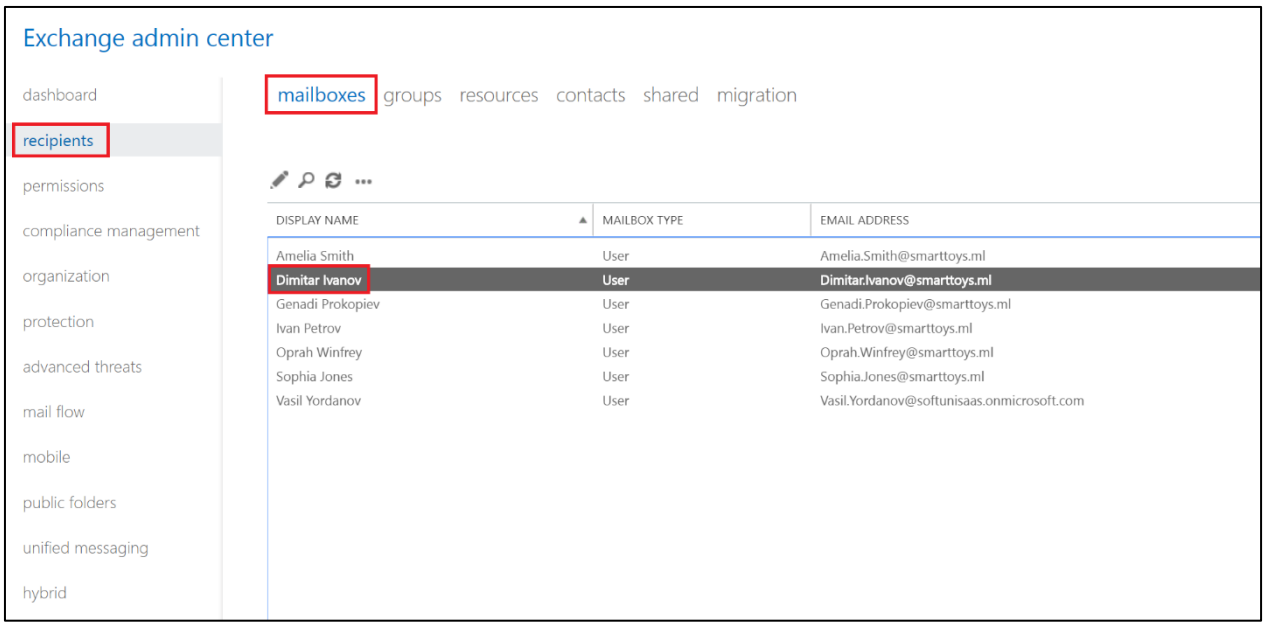
Introduction to LAB 3

In this first LAB, you will explore some (interesting) functionalities in Exchange Online, SharePoint Online and Microsoft Teams.

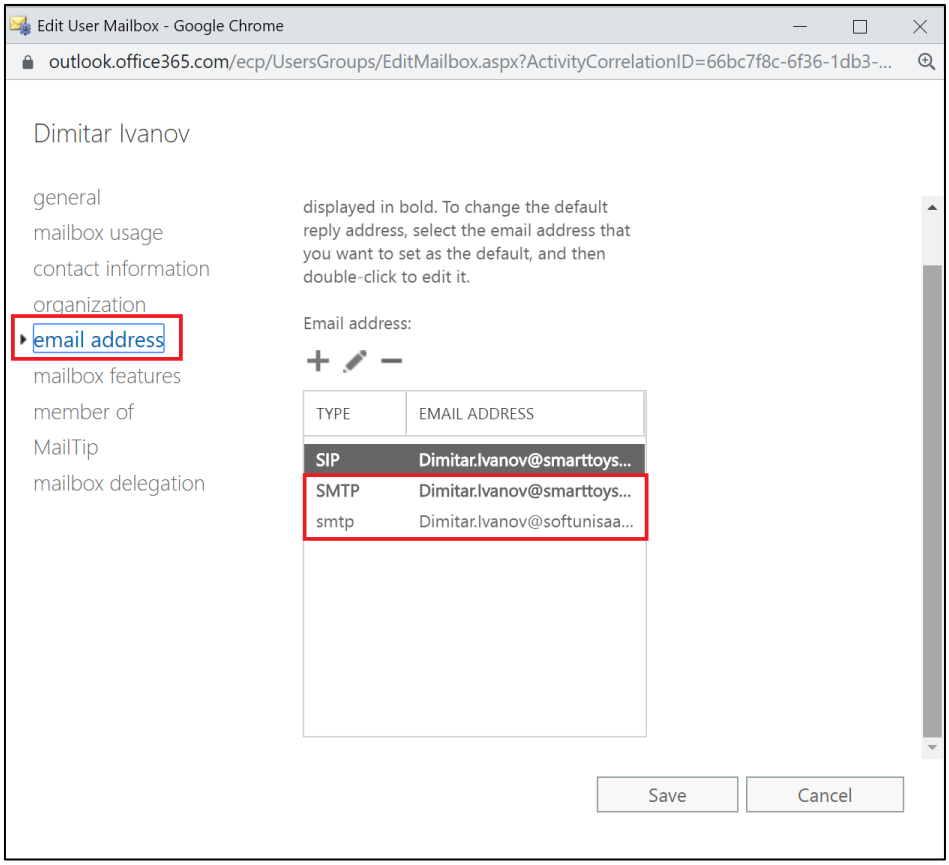
Exercise 1: Exchange Online

Explore Smtp addresses

1. Navigate to EAC (Exchange Admin Center).
   To do this, go to https://portal.office.com and authenticate with a global admin account. Then, on the left site, under the Admin centers section, open Exchange
2. In EAC, go to recipients -> mailboxes and click on one of the users

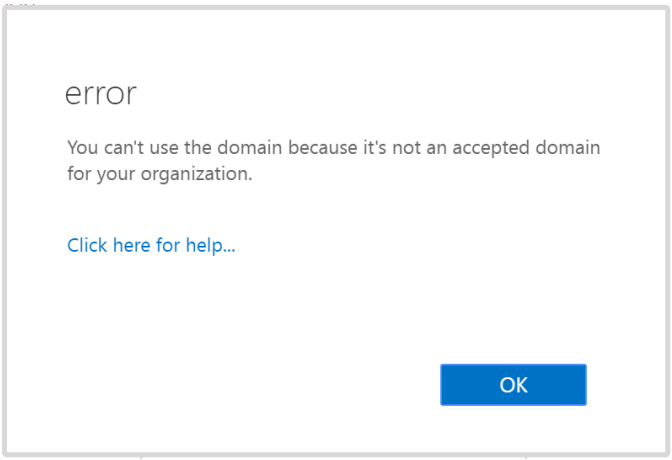


3. Navigate to the email address section and observe the Smtp type Addresses. They are two – one with capital SMTP letters and one with small - smtp. The first one (with the capital letters) is known as “primary” or “reply to” address. The other is known as “alias”. The user can receive emails sent to either one, but when this same user sends messages, they will go out only from the primary SMTP address.



4. Your task is to create several (2 or 3) aliases (smtp addresses). To do this, click on the **+** sign and add the smtp addresses. They should be in the format ***nickname@yourdomain.com***, where **nickname** is the alias

Note: You have to enter only addresses that belong to an “accepted” for your organization domain. In other words, this means verified domain. If you try to add a different one, you will receive an error as per the screenshot below



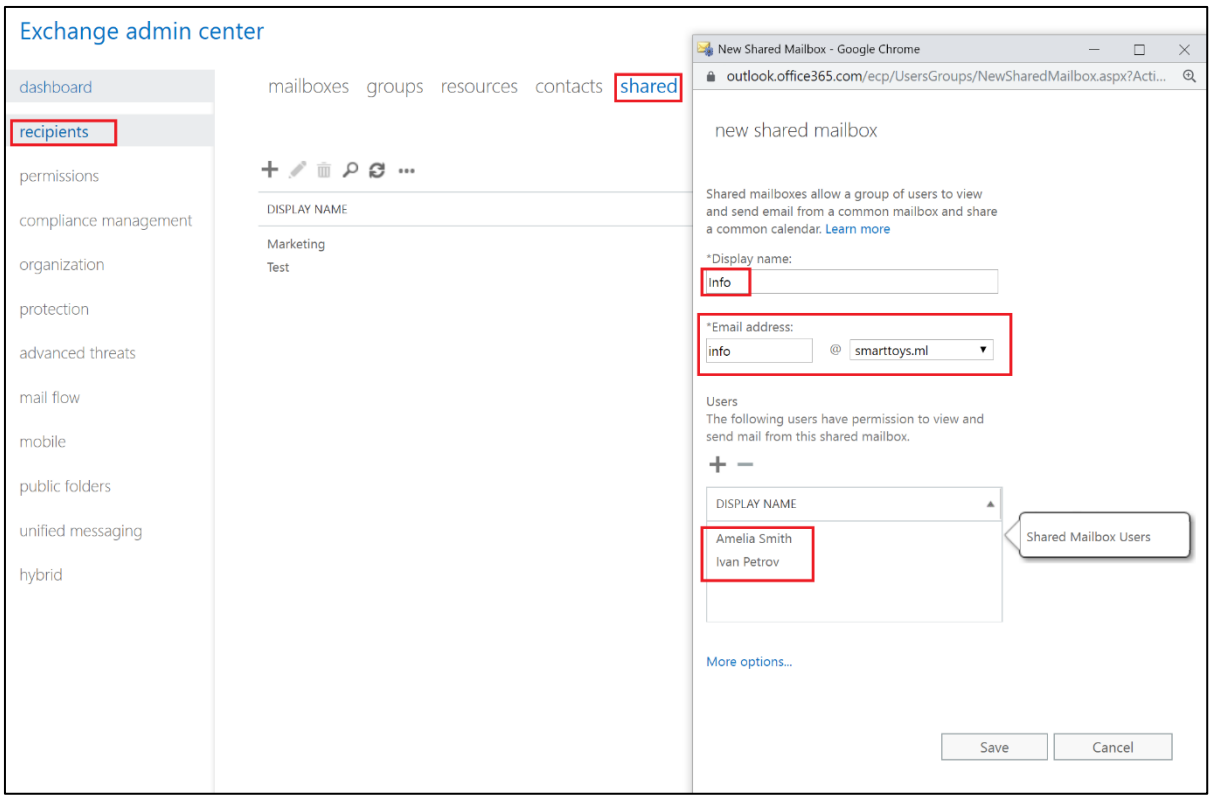
5. After you have added those aliases, try to send email to each of them. You can use either a different user from your tenant, or your personal email as a source. Then check and confirm that this user has received the messages – regardless of to which particular alias they have been sent, the user should receive them in his/her primary mailbox

Note: To open the user's mailbox, you can use either "Outlook on the web" (which means you have to login to https://portal.office.com with this user's credentials and then go to Outlook) or add his/her account to an installed email client such as Outlook

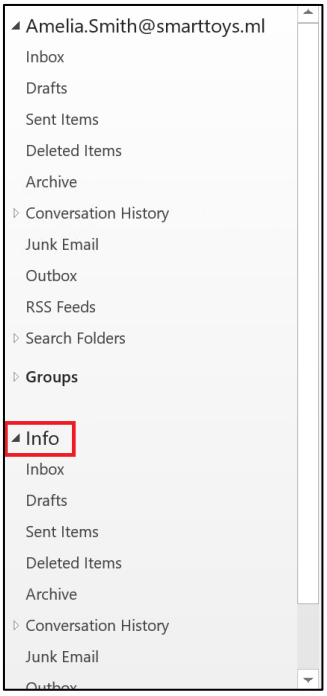
6. Now go to the mailbox of the user and send a message (or reply to one of the previously received emails). Go to the email of the receiver and confirm that the source of the email is the primary SMTP address

Create a shared mailbox

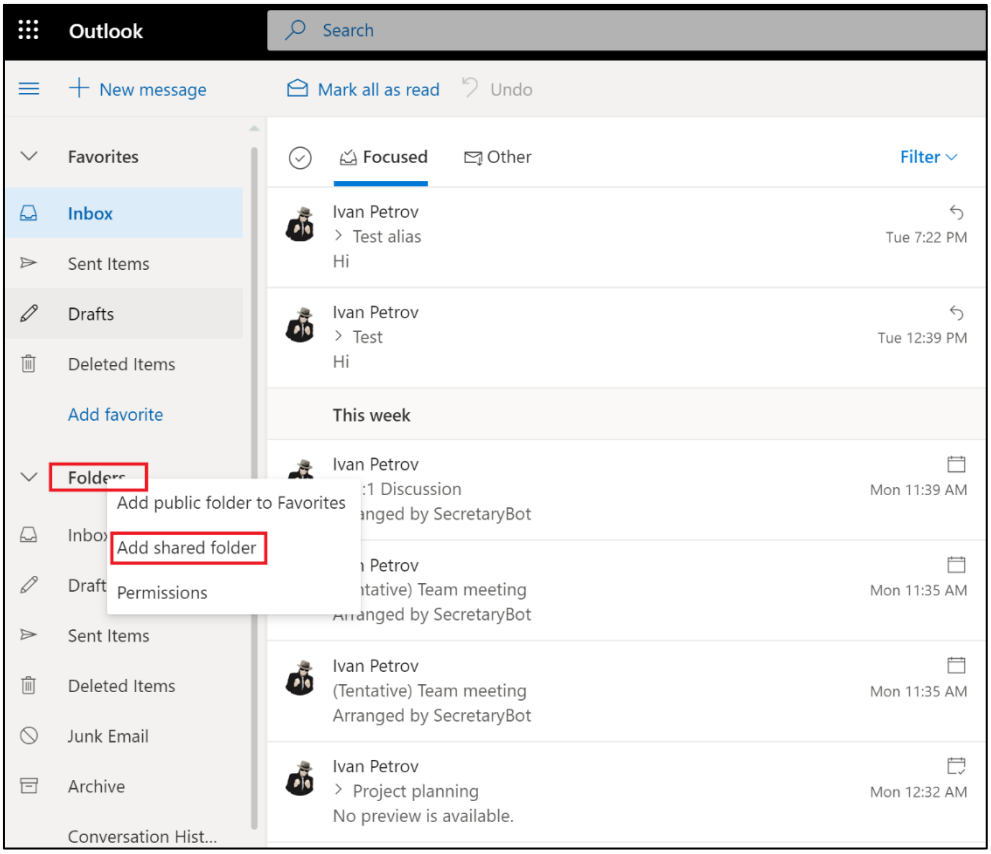
1. Go again to the EAC (Exchange Admin Center), navigate to recipients -> shared and create a new shared mailbox. As a "Display name", you can choose something like "Info" and as email address, you can configure something like info@yourdomain.com. Then, add users to this shared mailbox and click Save



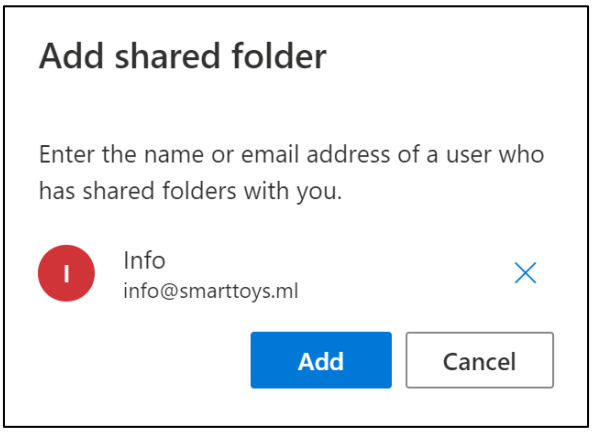
2. Now you need to find and access the shared mailbox. There are to options for this:
    a. Via Outlook. If you have one of your user accounts (members of the shared mailbox) added to an Outlook, the shared mailbox should appear automatically there. You need to wait for it, it can take 20-30 minutes and an Outlook restart may also help. Finally, it will look like this:



b. Via Outlook on the web. If you want to use this option, login to Outlook on the web with a user who has access to the shared mailbox and go to Folder section, right click it and select Add shared folder



Then, type the shared mailbox address and click Add



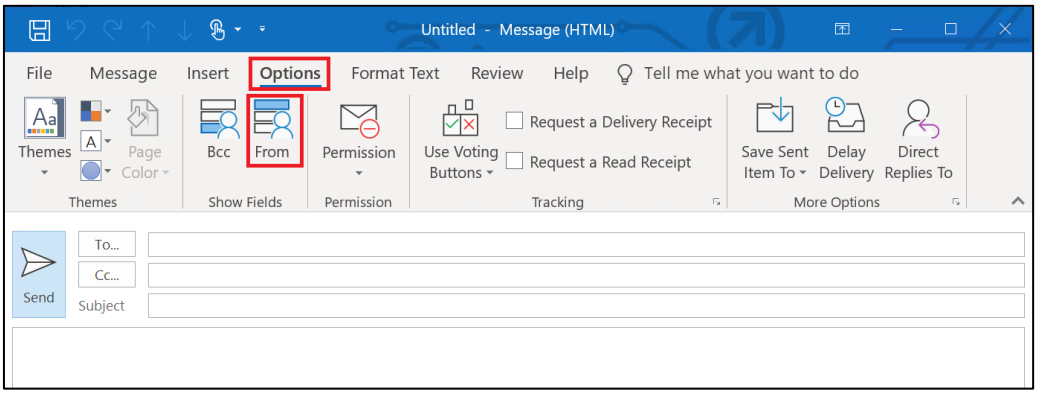
The shared mailbox should appear on the left side

3. Test your shared mailbox
   Since you have already added it to your Outlook (or Outlook for the web), you are able to receive and read incoming messages. In order to send

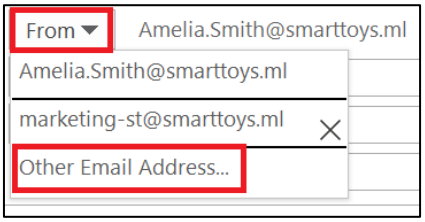
emails from the shared mailbox - again, depending on the client you use, they are two options:

a. Outlook

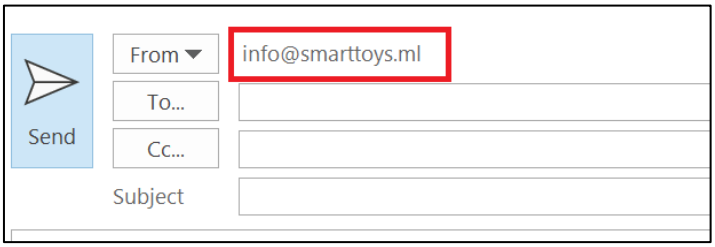
   i. Go to New Email and then go to Options -> From



   ii. Click the From button and select Other Email Address…



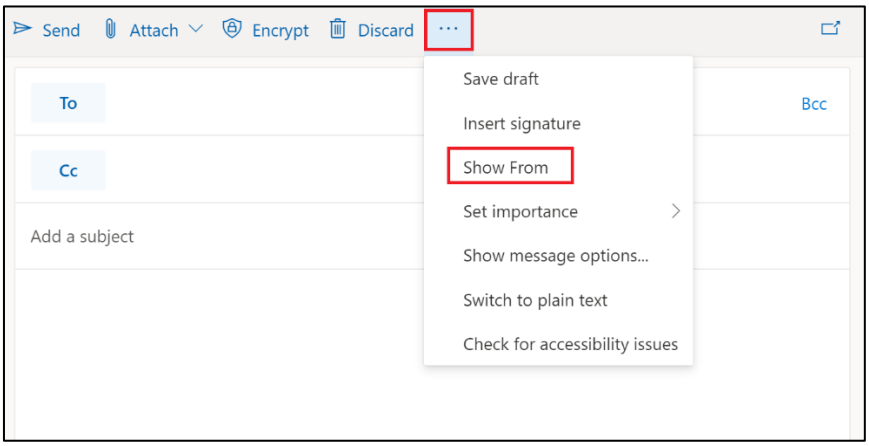
   iii. Type the address of the shared mailbox in the From field



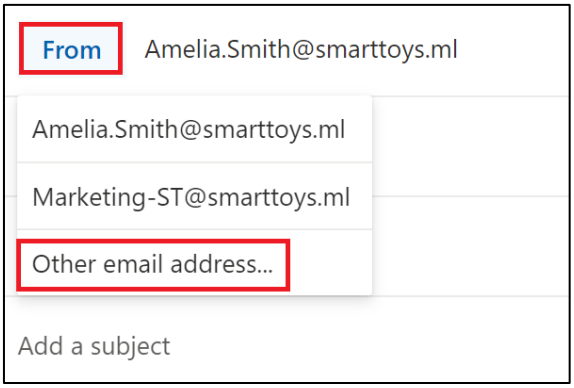
Now you can send emails originating from your shared mailbox

b. Outlook on the web

i. Go to New message, click the dots (see the screenshot) and select Show From



ii. Now, click the From button and select Other email address…

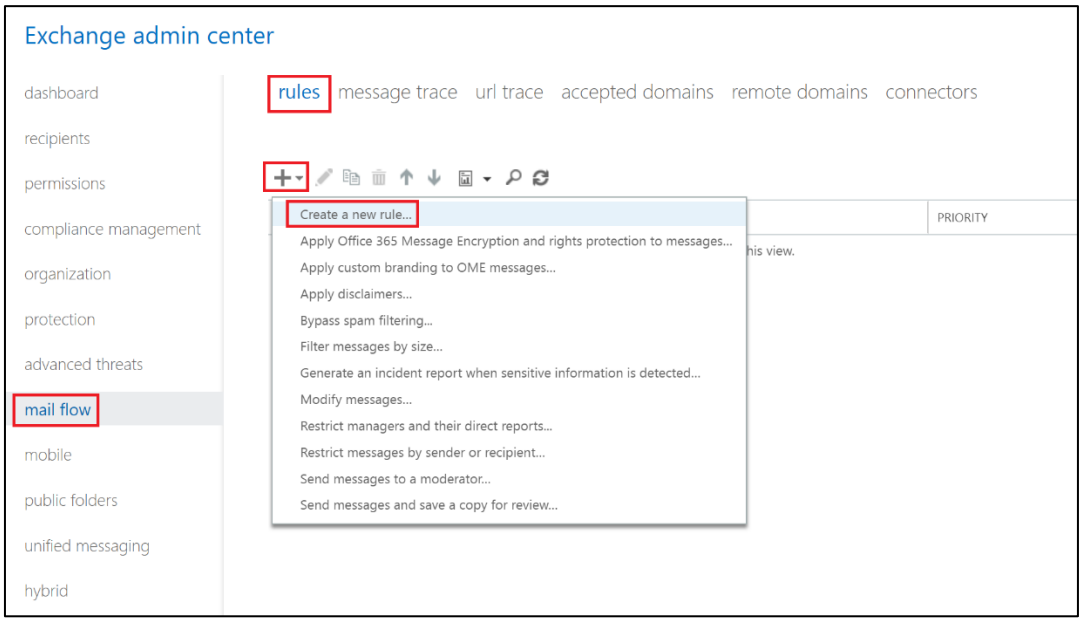


iii. Type the address of the shared mailbox in the From field

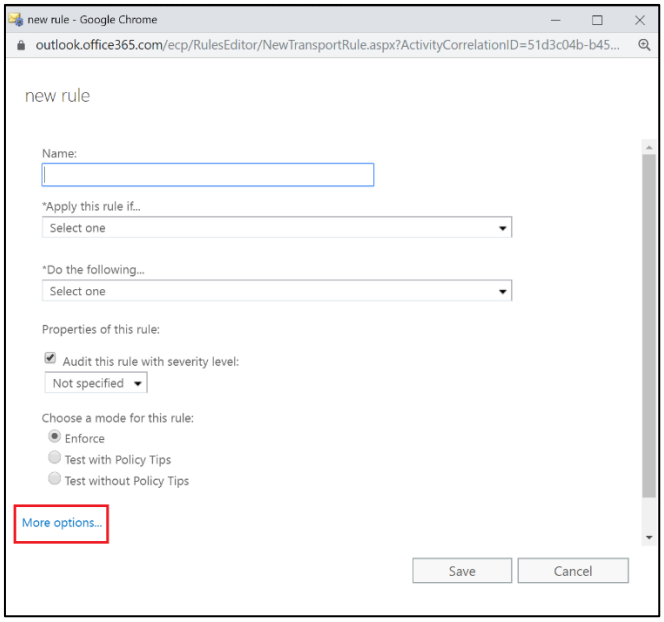
Now you can send emails originating from your shared mailbox

Create a mail flow rule

1. In EAC, go to mail flow -> rules, click on the **+** sign and select Create a new rule…

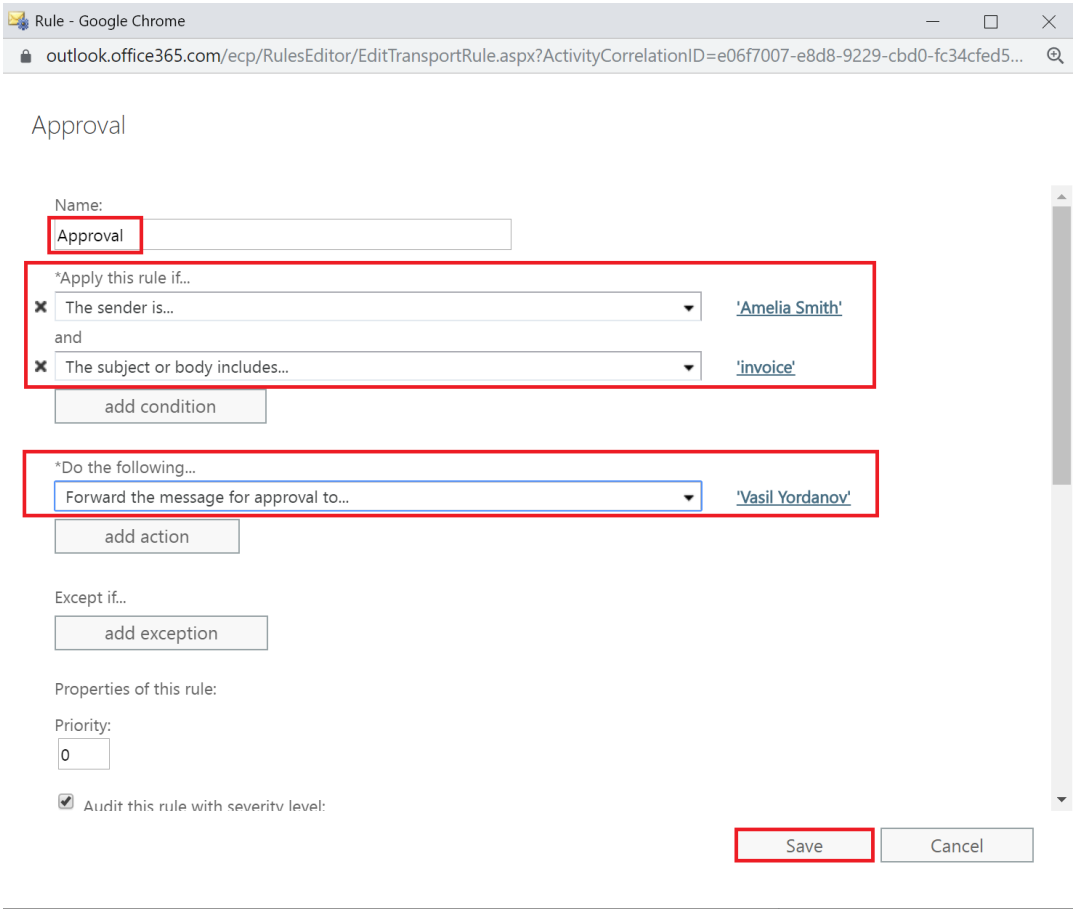


2. Before creating the rule, in the new rule window, click on More options… The reason is that this will allow you to insert more than one condition (we will need two)

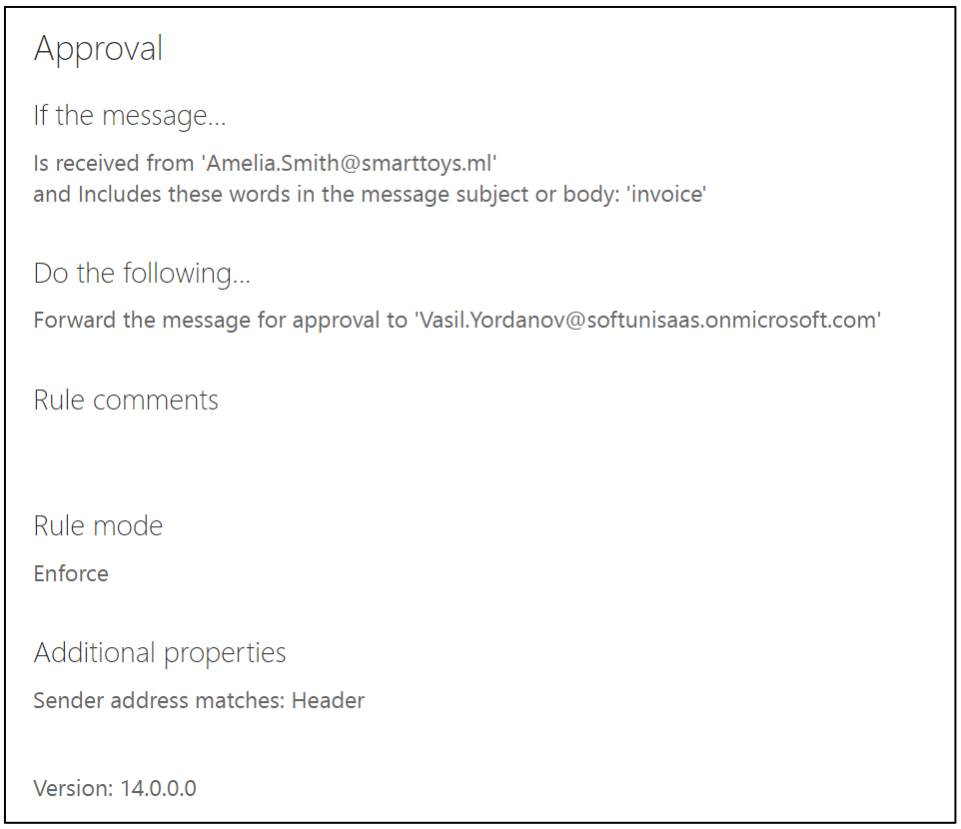


3. Create the following rule:
    a. **Name:** Approval
    b. **Apply this rule if**…
        i. **The sender is…**(put a user from your organization here) and
        ii. **The subject or body includes…** invoice
    c. **Do the following**…
    Forward the message for approval to…(put another user who will approve these messages)

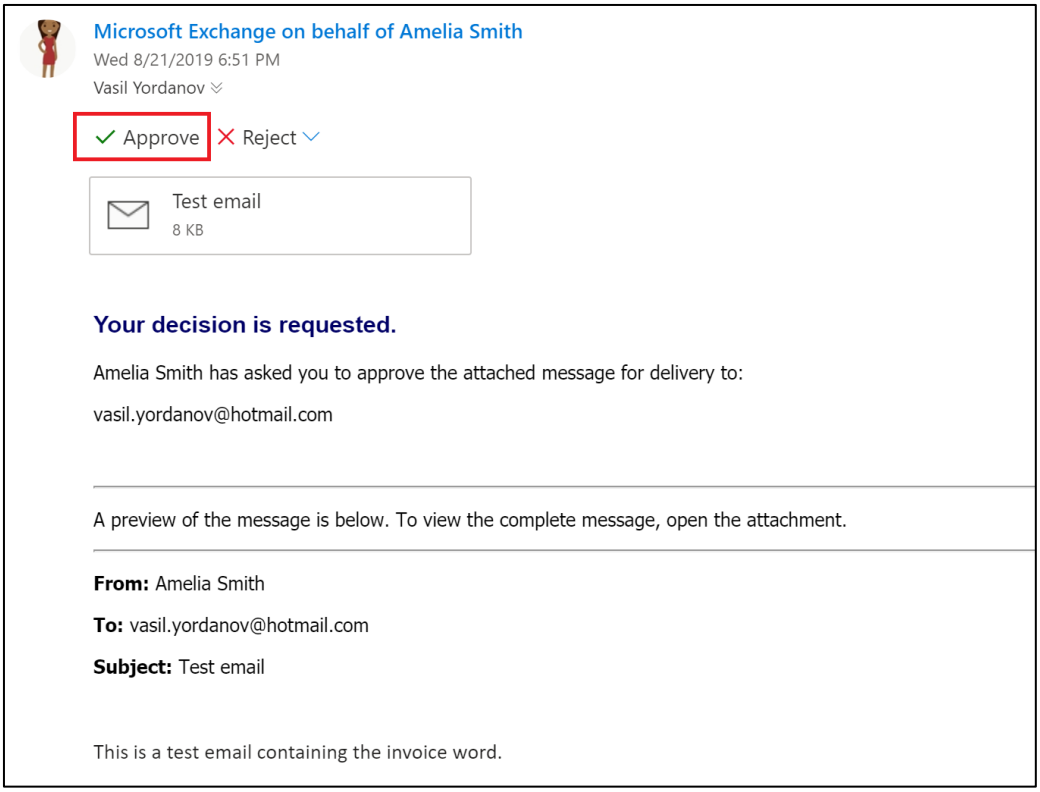
    Click Save



4. Once saved, the preview of the rule should look like this:



5. Test your rule.
    a. Go to the mailbox of the user whose email will require approval (in this example Amelia.Smith@smarttoys.ml) and send a new email containing the word “invoice”. It doesn’t matter to whom you are sending the email – it can be internal for the organization or external user
    b. This email should go to the “approver” (in this example vasil.yordanov@softunisaas.onmicrosoft.com). Login into the approver’s email and see the approval request, then click on the Approve button

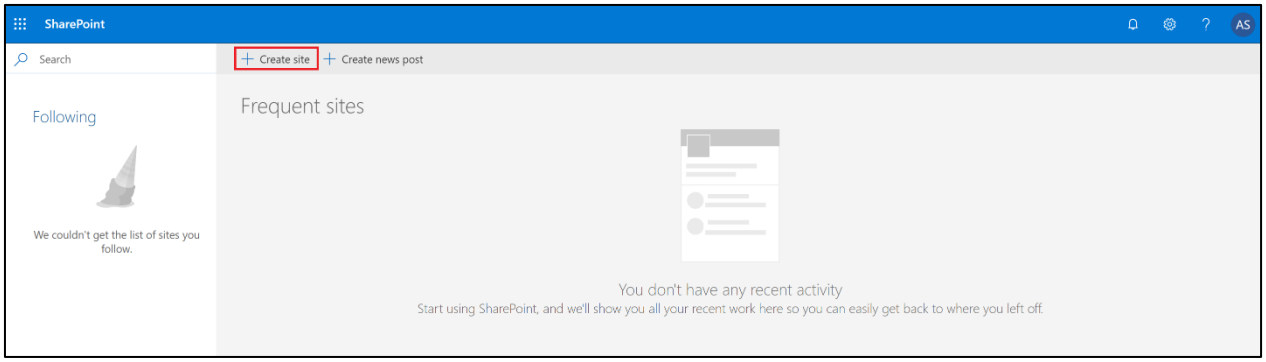


Note: The email will arrive to the recipient only if and after it is approved. It will not arrive if it is not approved or if it is rejected. If it is rejected, the sender will receive notification.

Exercise 2: SharePoint Online

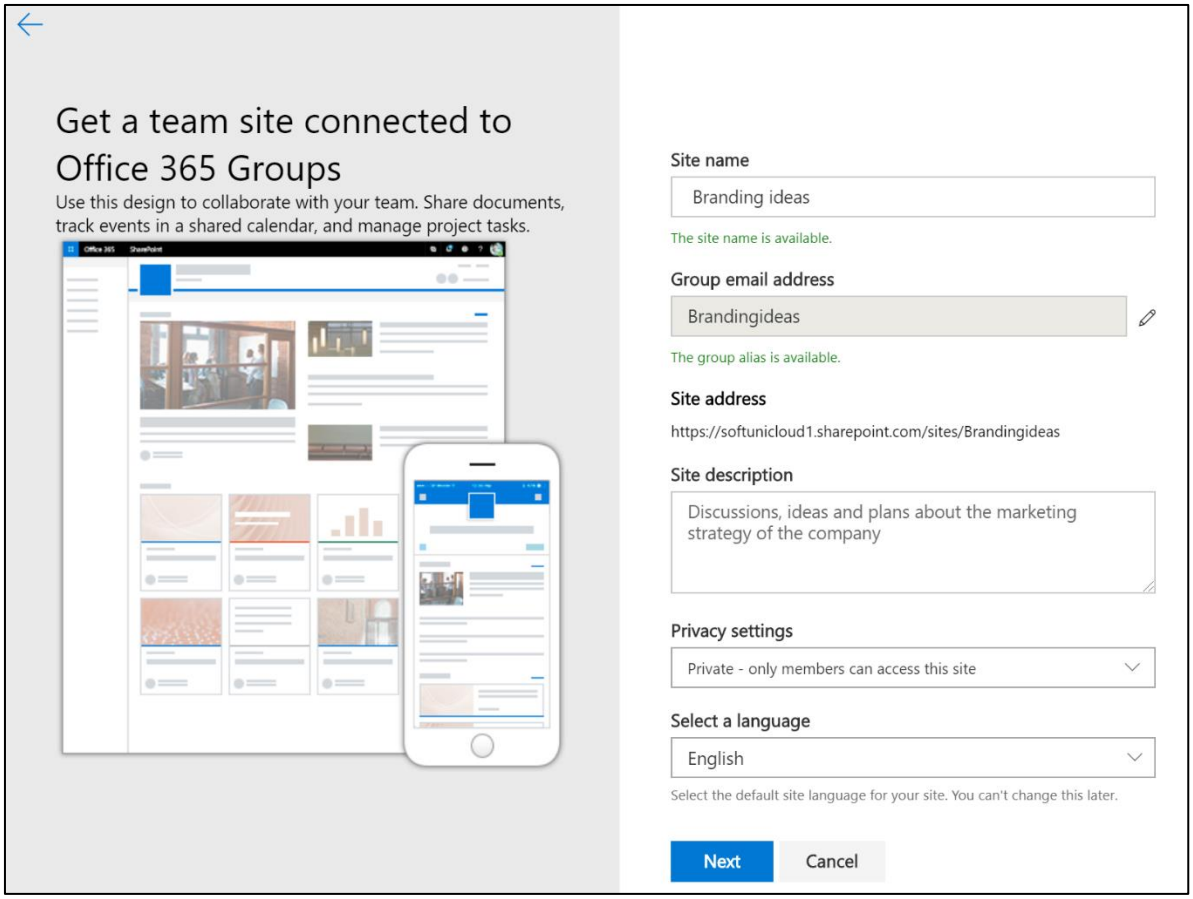
Create a new SharePoint site

1. Sign in to https://portal.office.com with a licensed user
2. Navigate to SharePoint section
3. It will depend on what sites the user is following, but most likely it will open a blank section. Click on the Create site link



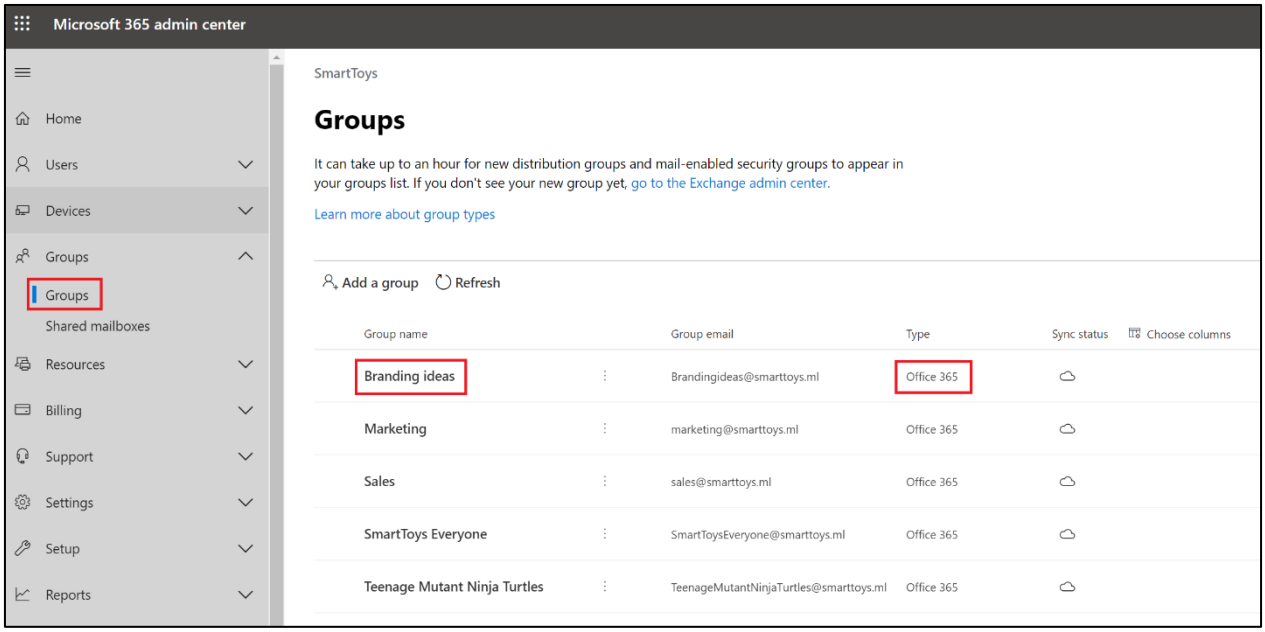
4. Select Team site.
5. Fill in the details about your site and click Next:
    - **Site name**: Choose a name for your internal site, for example **Branding ideas**
    - **Group email address**: Note that it will be automatically created (based on what you entered for Site name), but you have an option to change it
    - Note the **Site address** – it will have part of the initial domain (**something.sharepoint.com**) in its name. This is something by design and cannot be changed even that you have added custom domain(s) in your tenant
    - **Site description**: either put a description or leave it empty
    - **Privacy settings**: Private – only members can access this site
    - **Select a language**: English

    Click Next



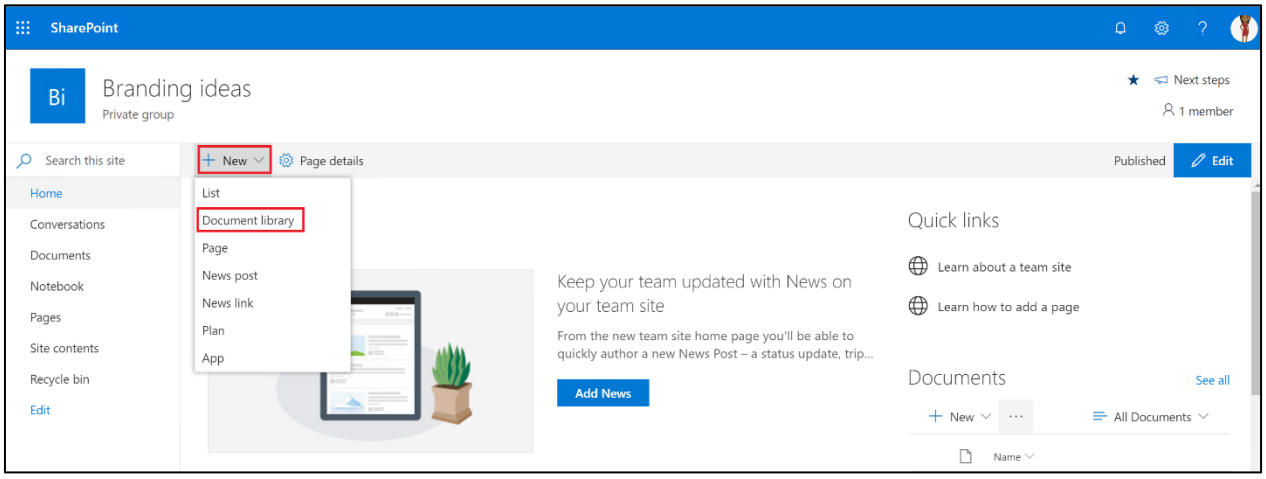
6. Leave the Add additional owners and Add members boxes blank and click Finish
7. Your site is now up and running. Have a look on the menu in the left side – one of the things there is called Documents. And this "thing" is the default document library. In the next section, you are going to create another document library so you can create/upload documents inside

Note: Remember – when you create SharePoint site, in the background it creates an Office 365 group (and vice-versa). To check this, go to the portal (with global admin account), then Admin -> Groups -> Groups and see it:

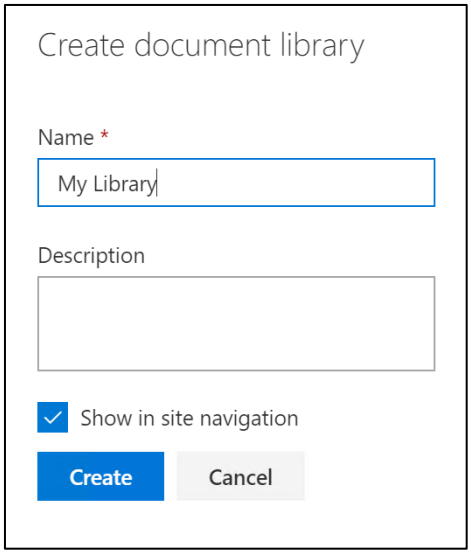


Create a new document library inside your SharePoint site

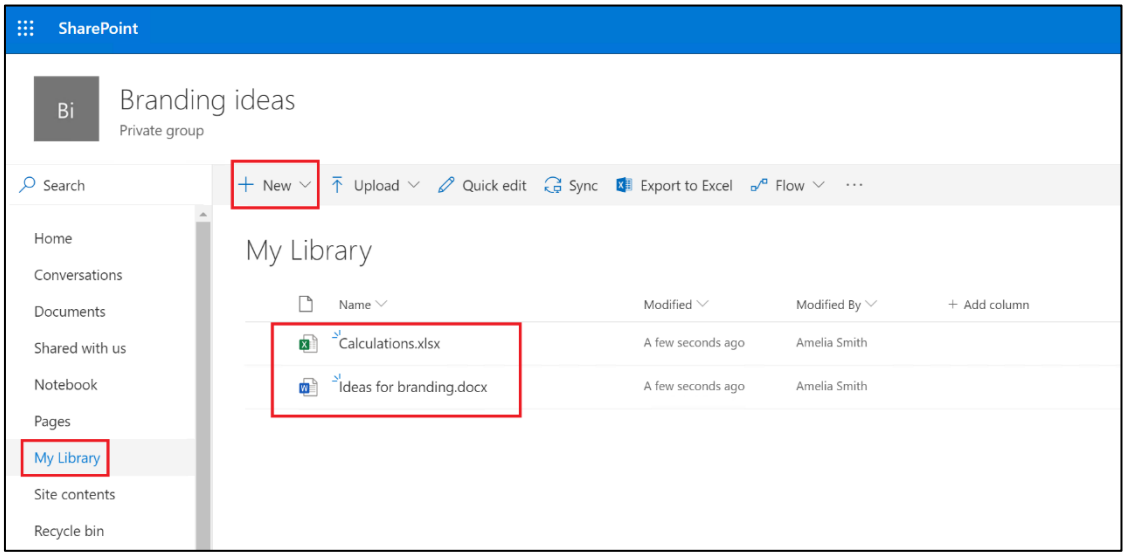
1. Go back to your new site with the user who created it and click on New -> Document library



2. Create a name, for example My Library, leave the checkbox next to Show in site navigation enabled and click Create



3. Your library is now created. Go inside it and create two documents by clicking to New button – one Excel (name it “Calculations”) and one Word file (name it “Ideas for branding”). Create some content inside these documents.

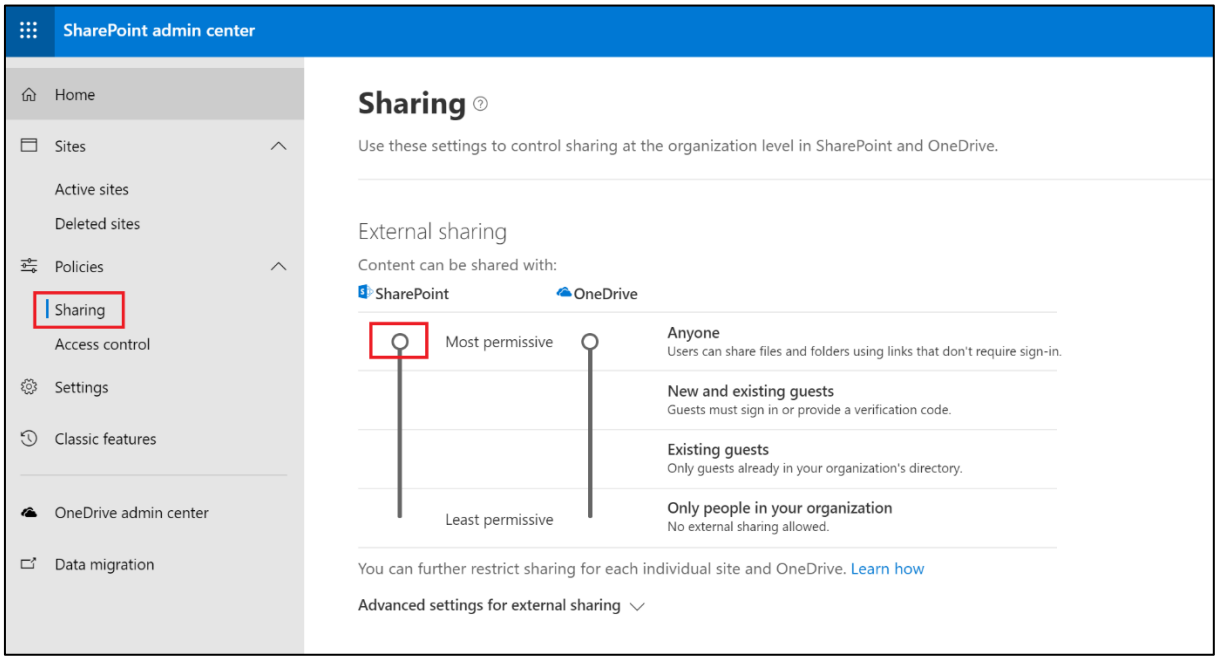


Note: When you create the documents in this way (directly from the SharePoint), you are using the “Office for the web” functionality or in other words Office Online.

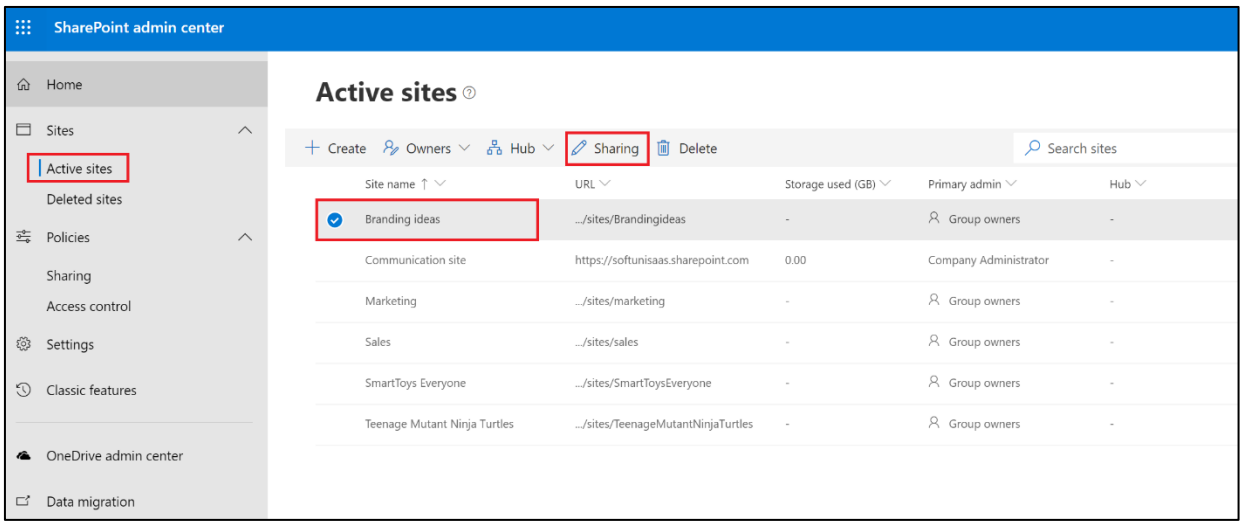
Share a document with anonymous link

As you know, there are multiple ways to share a document from a SharePoint Online document library. One of them is just to create an anonymous link for accessing a file. Note that this can be dangerous since there is no personal authentication and the link can be later sent to different people.

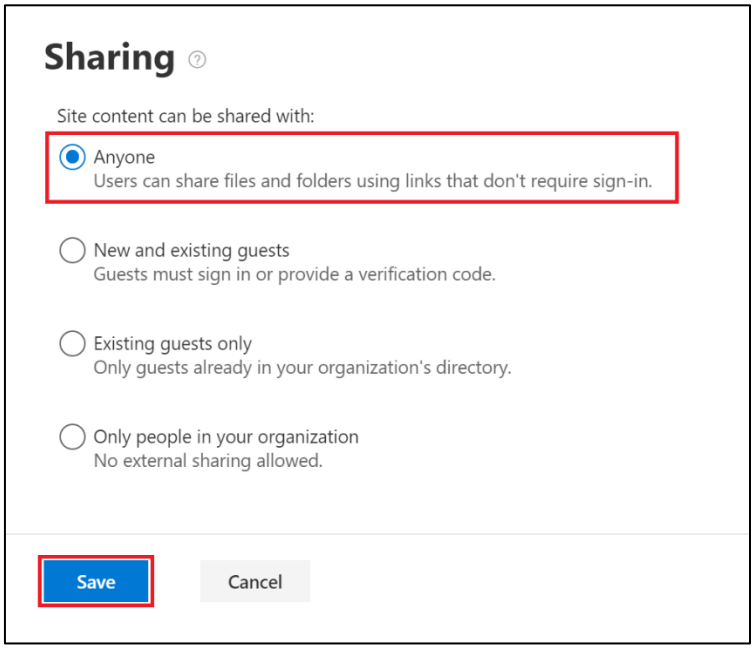
1. Configure the external sharing on the organization level.
   First thing is to adjust the external sharing for the entire organization to allow anonymous links. Wih your global admin account, go to Admin centers -> SharePoint -> Sharing and adjust the slider for SharePoint to Most permissive



2. Configure the external sharing on the site level.
   You also have to configure the external sharing level, this time for the particular site. Go to Admin centers-> SharePoint -> Active sites, select the site ("Branding ideas") and click Sharing



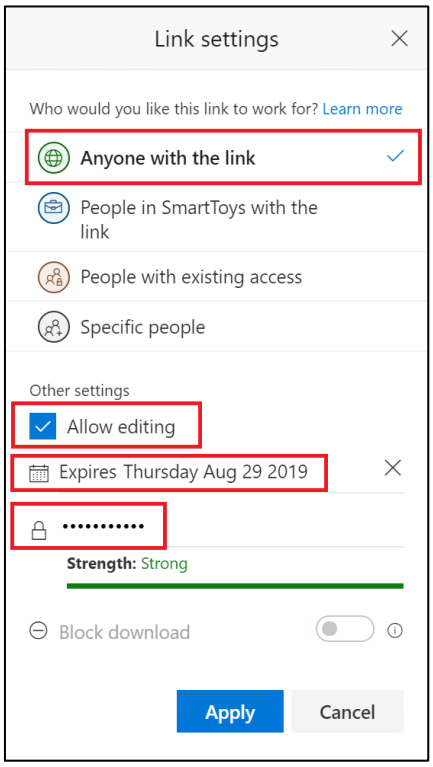
Select Anyone and click Save



3. Share a document.
   Go to your site (with the account who created it), go to the document library ("My Library"), select one of the documents and click Share. Configure the following sharing settings:
   - **Anyone with the link**
   - **Allow editing**
   - Set expiration date (several days after "today")

- Set a password

Finally, click Apply



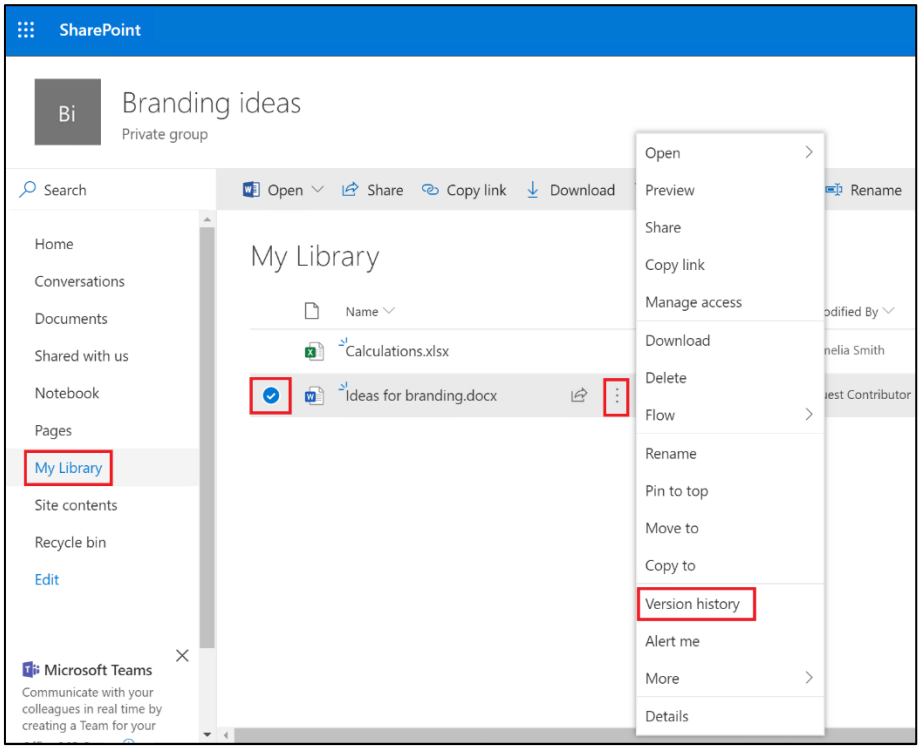
Either send the link via email or click on Copy and save the link somewhere (to use it on the next step)

4. Access and edit the document as anonymous user.
   Either open a different browser or use "Incognito" browsing to open the link. Provide the password when requested and edit the document – enter some new text. The new version of the file will be automatically saved. Remember the text that you have entered "anonymously" since you will need this in the next step

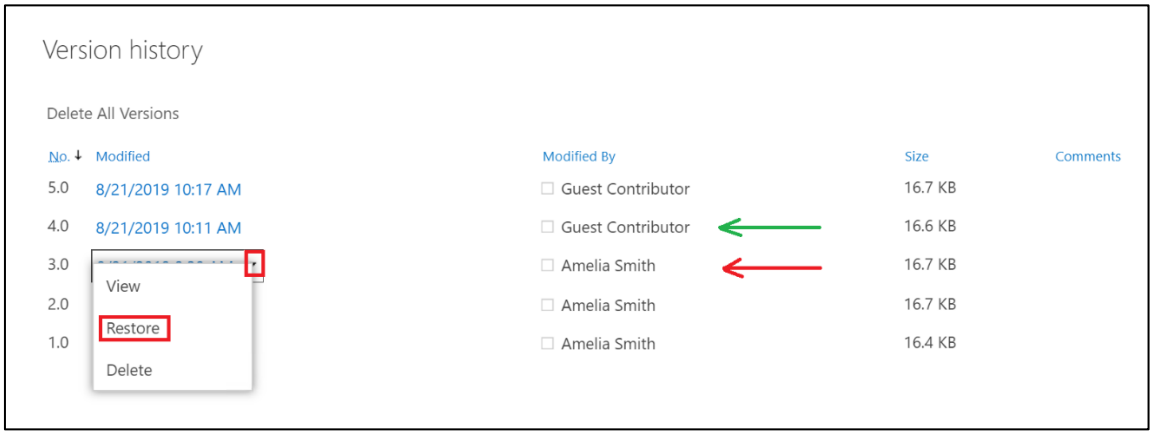
Revert to an older version of a document

Now we want to revert the document to the state it was before the “anonymous” user edited it. To do this:

1. Go to you site, library and select the document. Click the “dots” menu to the right and go to Version history



2. Note the Guest Contributor modifications. We want to revert the document before them. Find the correct version, click the down arrow and click Restore



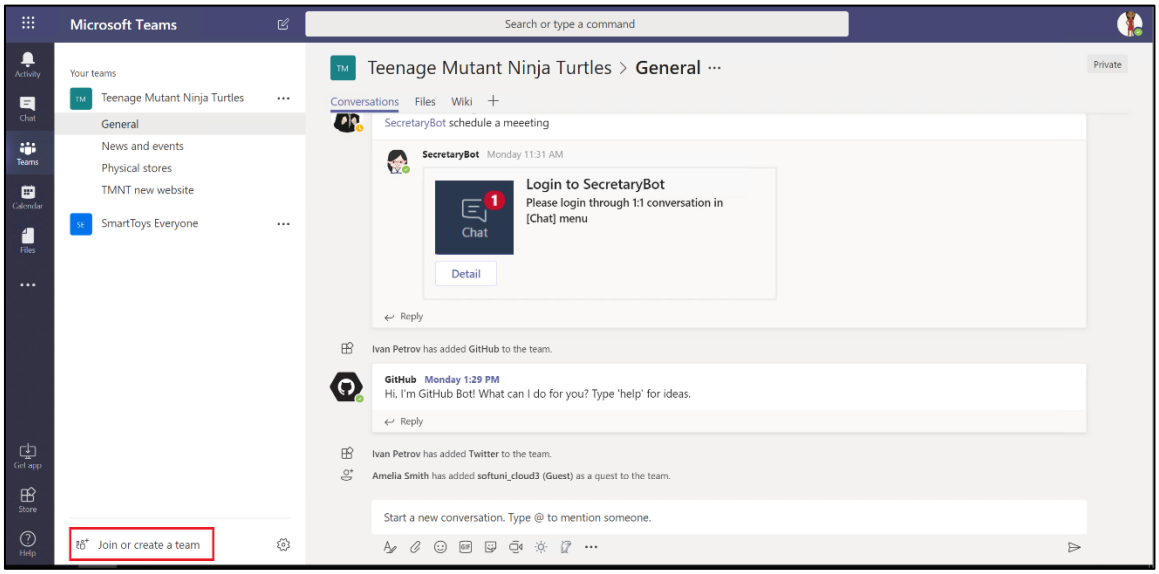
3. Open the document and verify that the “anonymous” modification is now gone

Exercise 3: Microsoft Teams

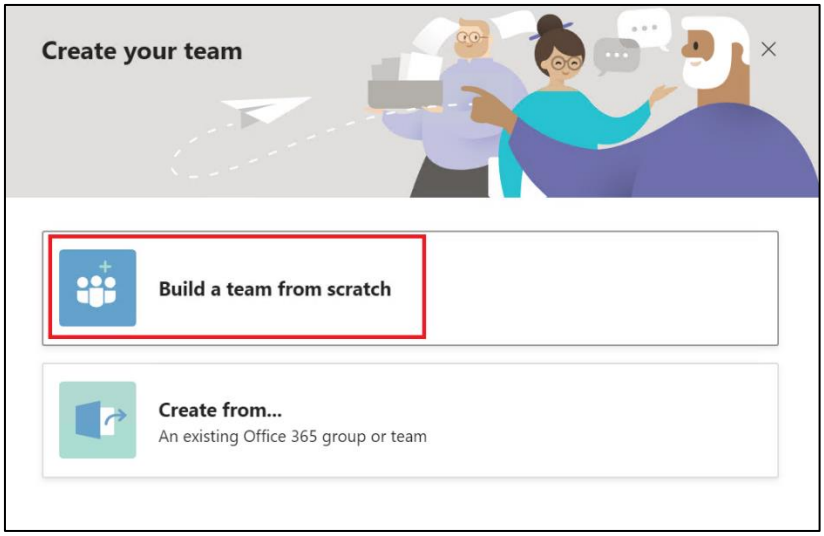
In this exercise, you will create a new Team and play a bit with it. For this purpose, you will either need the Microsoft Teams desktop client installed or use the web version of it.

Create a new Team

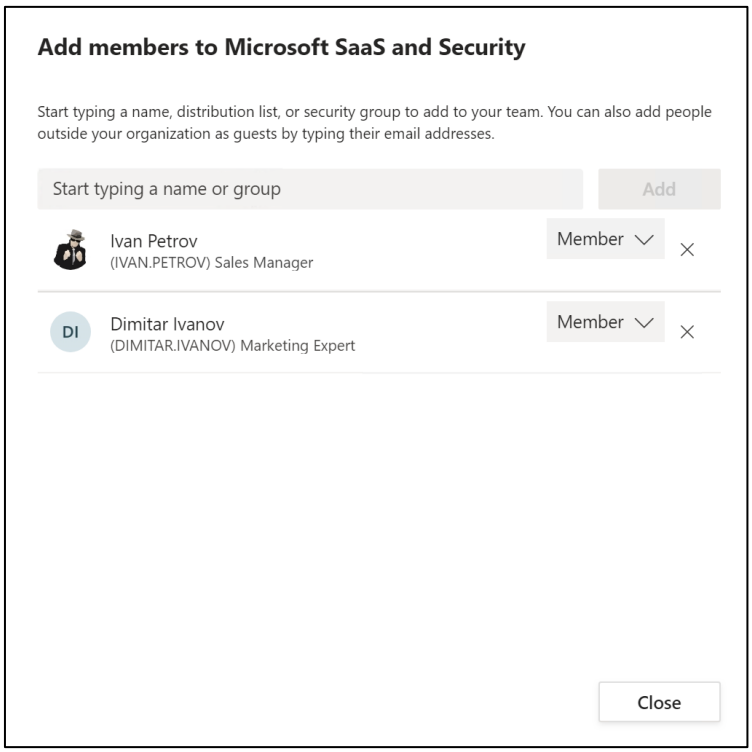
1. Start either by launching Teams (if you are using the desktop client) or by navigating to the web app. You have to be logged in with a regular user (not a global admin) who has a license
2. Go to the bottom and select Join or create a team



3. Click Create team and select Build a team from scratch



4. Next, select Private
5. Enter a team name. Put something, for example “Microsoft SaaS and Security” and then click Create
6. Add several users as members and click Close

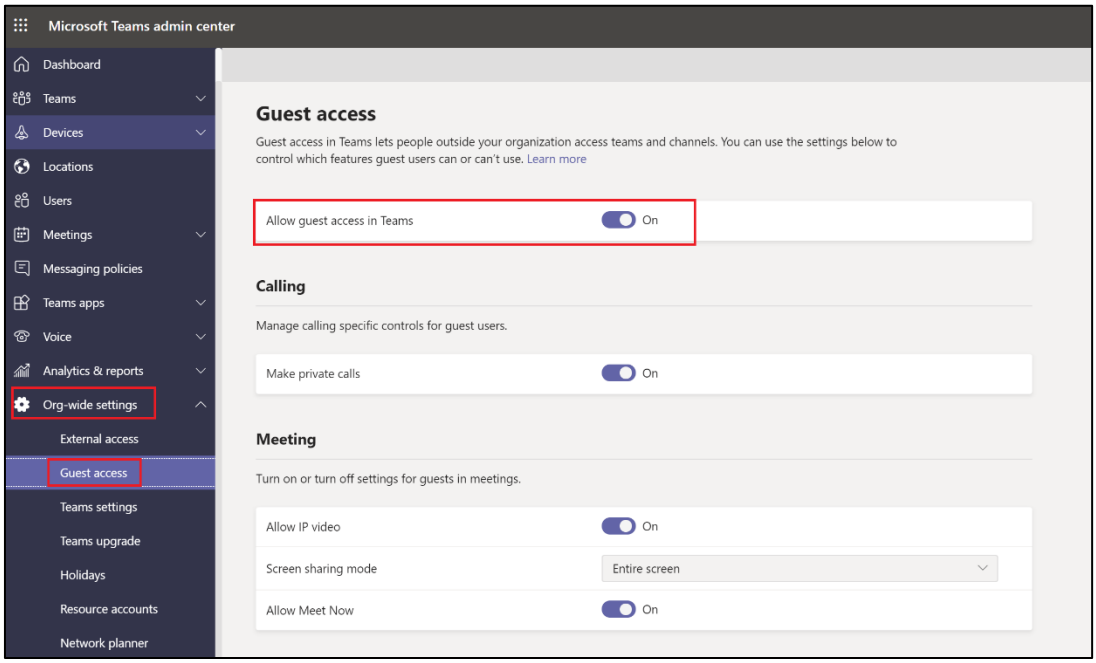


7. Done! Your new team is up and running and all the members will receive notifications (that they have been added to the team). Also, they can start using this team immediately

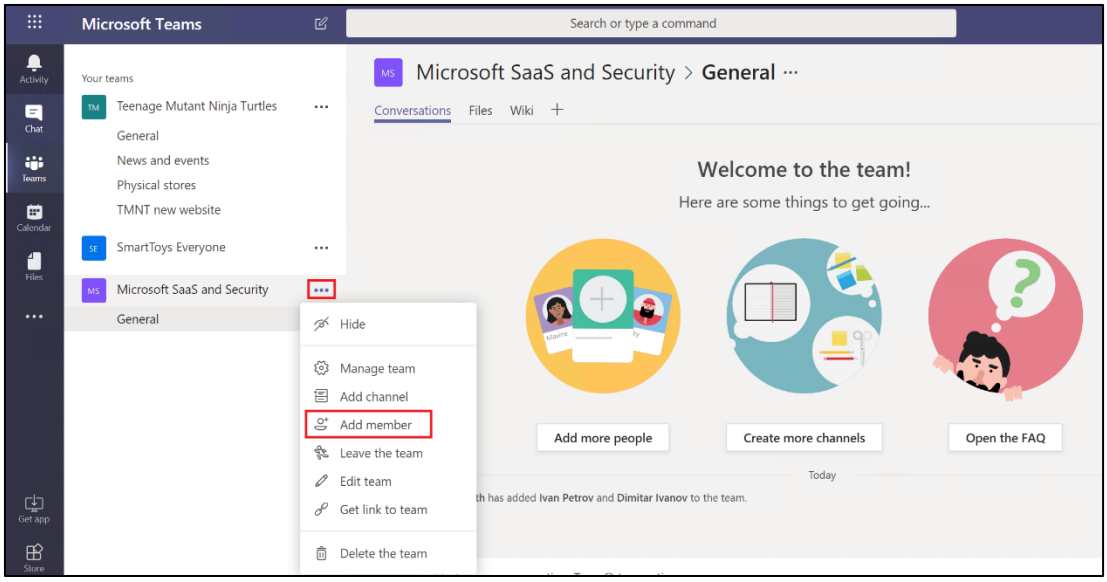
Add external user as a member (guest)

To be able to add guests in your Team, this functionality has to be first enabled from the Teams admin center. Also, prepare an external (not from your tenant) email address, which you will use as a "guest". The recommendation is to create a new one instead of using your one of your existing personal email addresses.

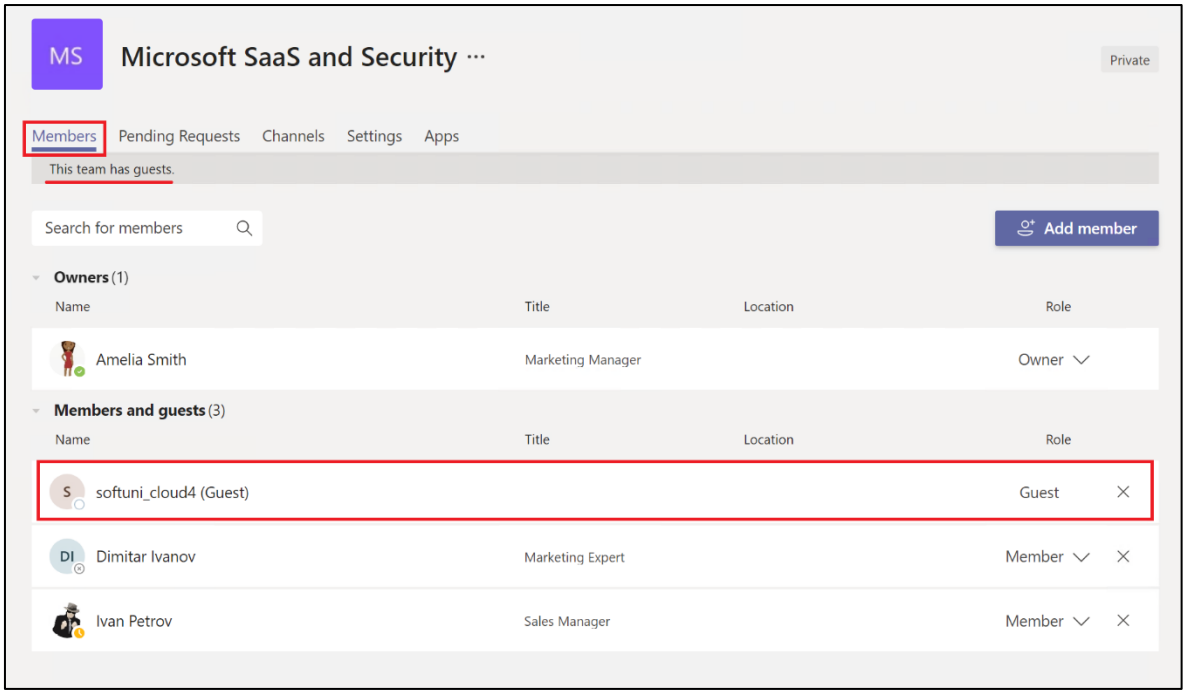
1. Login to the portal with a global admin and go to the Admin centers -> Teams -> Org-wide settings -> Guest access and enable the option next to Allow guest access in Teams



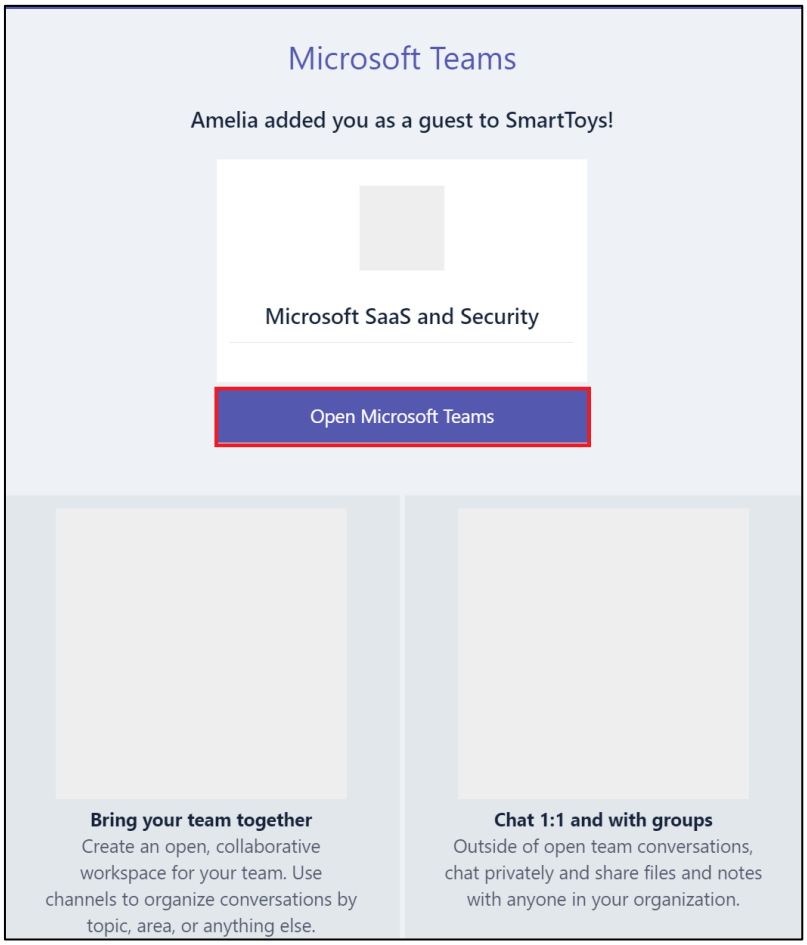
2. Go back in Teams as the user who created your new team. Go to the "dots" menu and select Add member



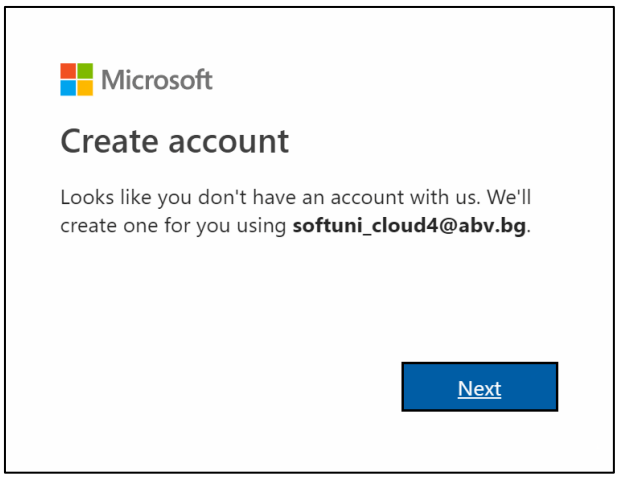
3. Enter the “guest” email address which you have previously prepared for this purpose, click Add and then Close
4. You can see the team members, including the guest, by going to the team’s “dots” menu, then Manage team and then Members section (have a look also on the “This team has guests” message)



5. Login with the external user. Open your “guest” email and go to the invitation. Note – it is recommended to use either a different browser or to use “Incognito” browsing, since you will be using different credentials. Inside the invitation, click Open Microsoft Teams



Office 365 will now check your account. Actually, it will say that you **do not have** Microsoft account with this username, and this is true. You will need to create it and the “guest” email address will be the username of the account, but you will need to create a password



Follow the instructions - create your password and enter your details as requested. Then go back to your guest email to grab your verification code. Continue through the account creation wizard until you login to the Team as a guest user.

Note: This can be confusing. As you can see in this example, the guest email address is softuni_cloud4@abv.bg. There is a password for this email, let's say that this is "password1". When you create Microsoft account with this username, you need to create another password, let's say that this is "password2". What happens now is that you have your email address as your Microsoft account, but depending on what resources you access, you need to provide different passwords:

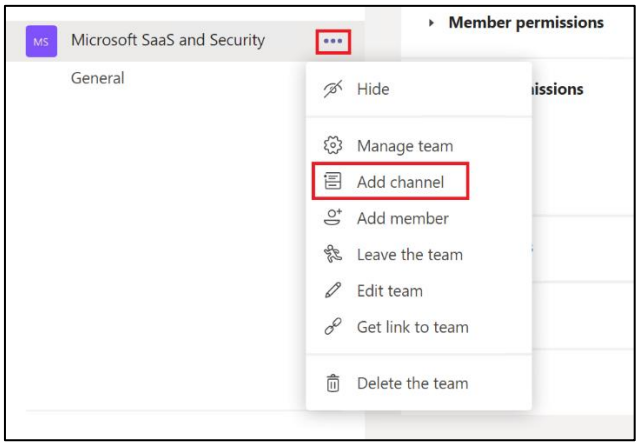
- When you access your email, you provide:
  - Username: **softuni_cloud4@abv.bg**
  - Password: **password1**
- When you access Teams (as a guest), you provide:
  - Username: **softuni_cloud4@abv.bg**
  - Password: **password2**

Again, this may bring confusions for the users. One way to avoid it is to ask the "guest" user to use his/her Microsoft account and if they do not have – to create one. The Microsoft account may be an Office 365/Azure account or a personal one in the format user@hotmail.com or user@outlook.com. This way they will have a Microsoft identity and will still be guests to your organization but will have the same password for the email and for the Teams login.

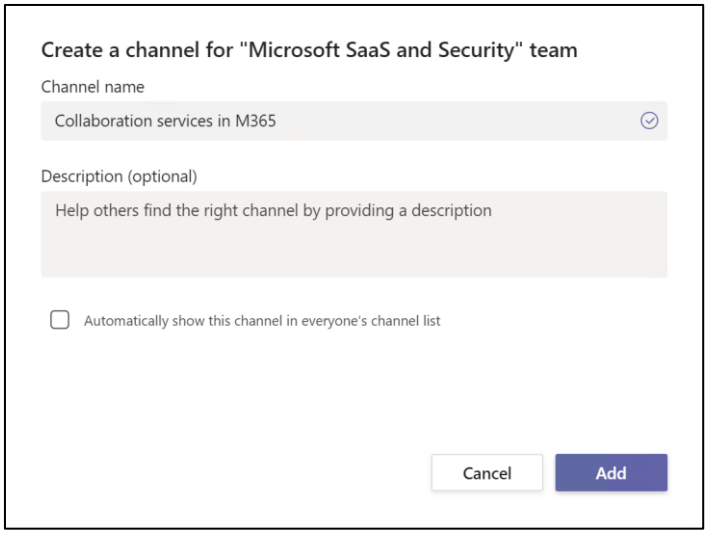
(Another option would be to make **password1** to be equal to **password2** and this can help a little, but this way both accounts will be still subject to different password policies. For example, you can be forced to change one of the passwords more frequently than the other. An this is not very convenient also)

Create channels

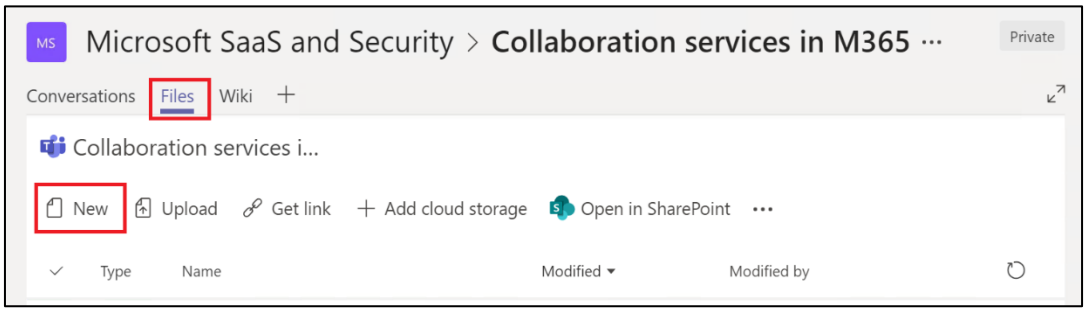
1. Login in Teams with one of the users of the team (not the guest, because by default guests cannot create channels) and go to the “dots” menu, then select Add channel



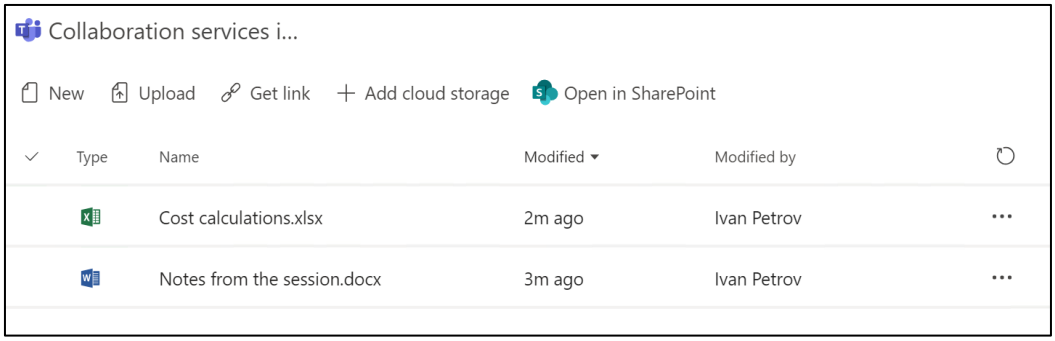
2. Give your channel a name, for example Collaboration services in M365 and click Add



3. The channel is now created, and everyone can see it (although we didn't check the tick next to "Automatically show this channel in everyone's list"). You can create more channels using the same steps. For example, add some of the other modules of this course as channels names, as we did with this module
4. Select one channel and go to the Files tab. Then click on the New button to create two new files

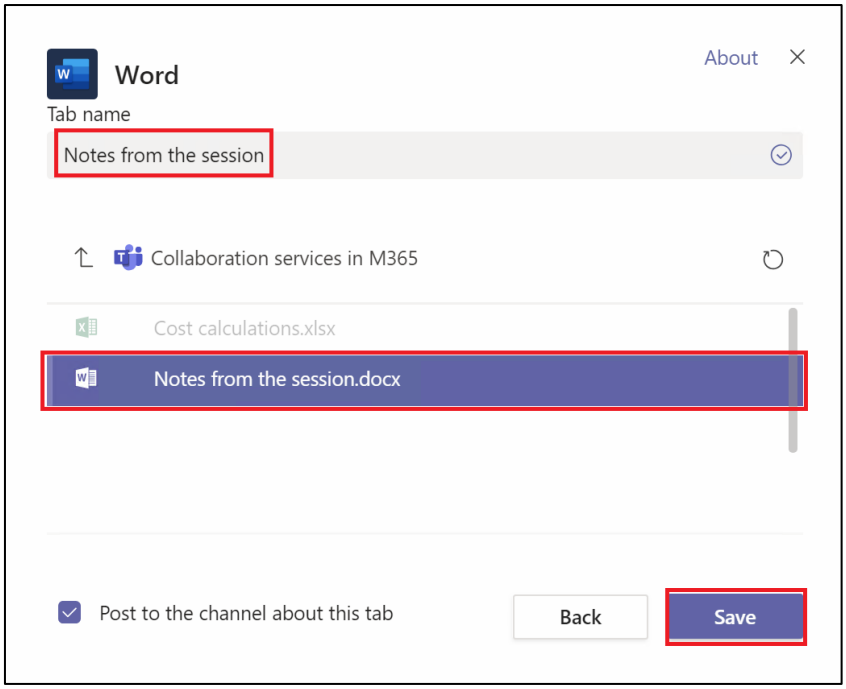


5. Your files should look like this:

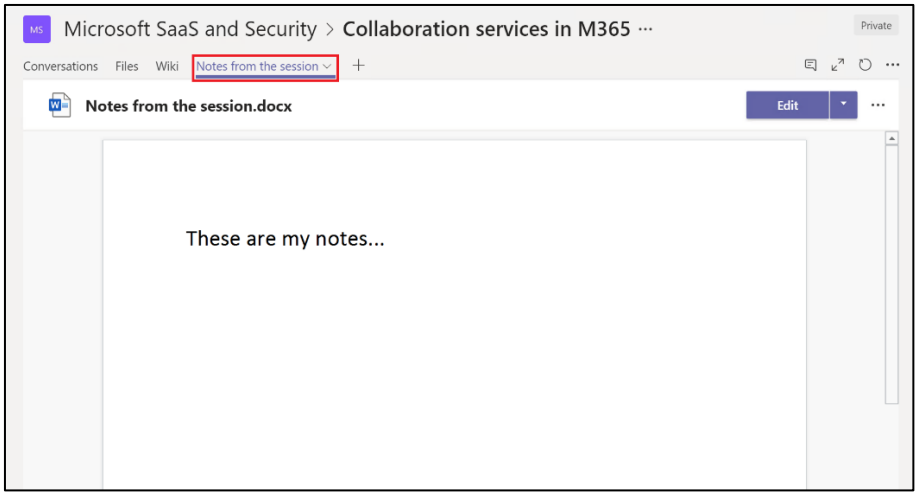


Put some sample text in these files.

6. You can connect different tabs in your channels. For example, click on the **+** sign and select Word from the list. Then type **Notes from the session** in the Tab name, select the corresponding document below and click Save

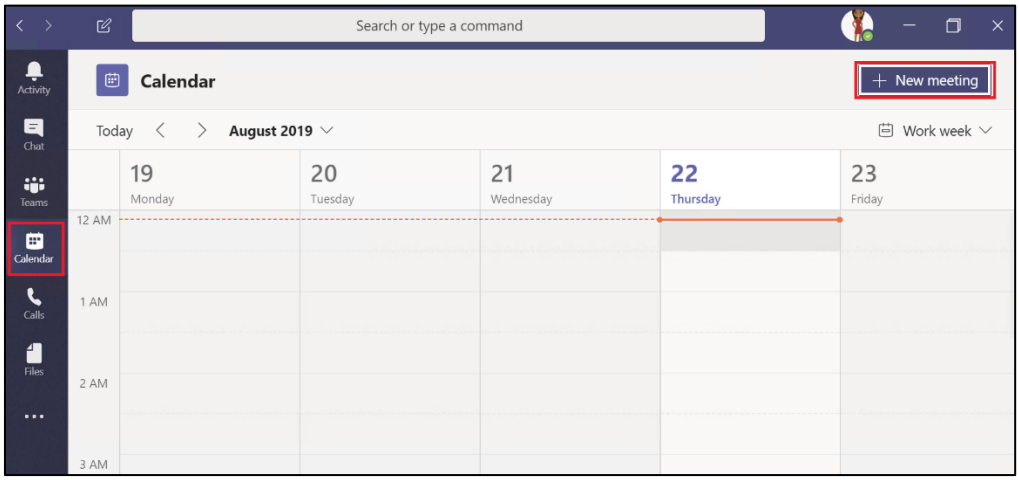


7. The document is pinned now on the top. If you click on the tab, it will open inside Teams and you can view and edit it

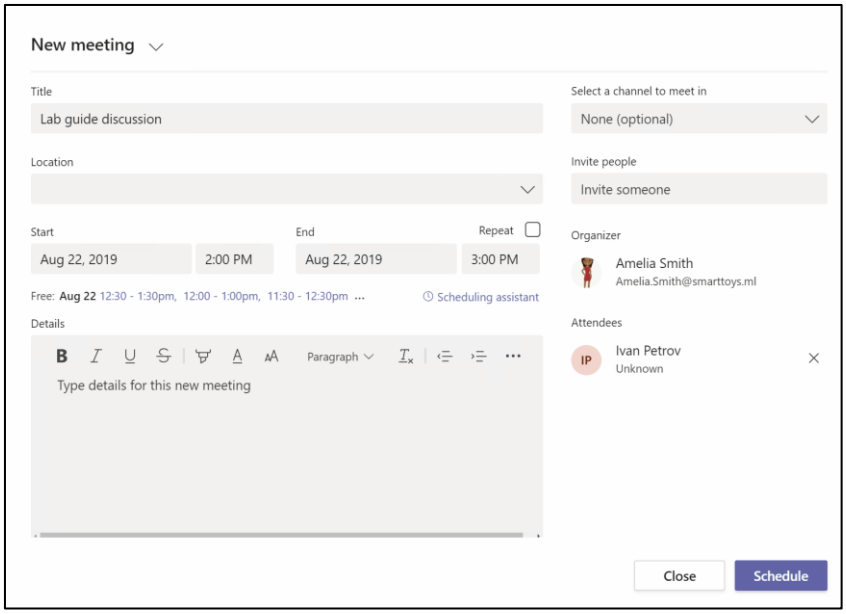


Schedule a meeting

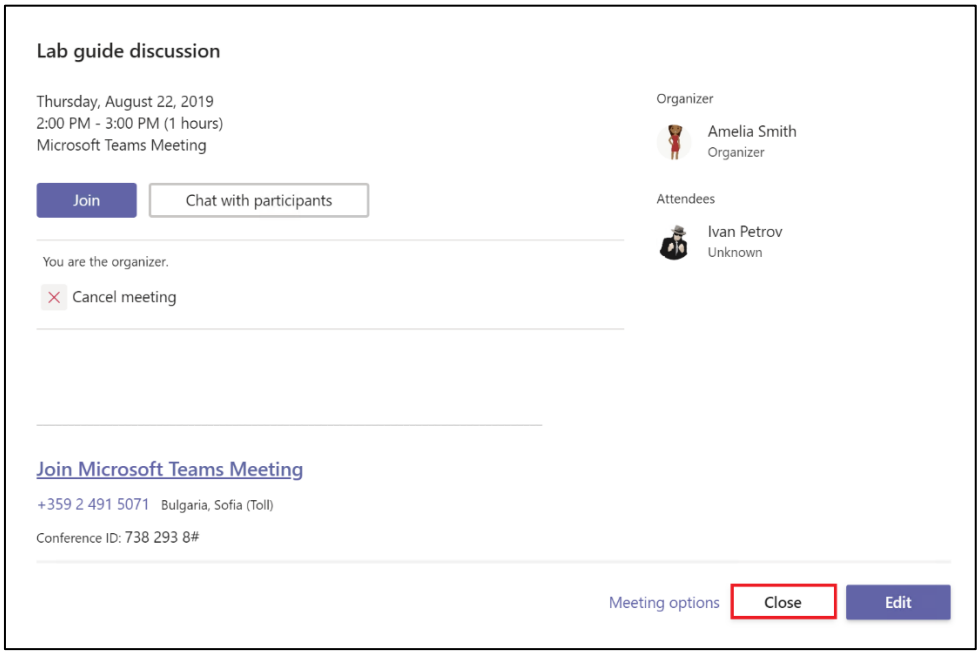
1. In Teams, go to the Calendar section and click New meeting



2. Create a new meeting. Fill the Title, meeting hours and invite someone, finally click Schedule:



3. Check the meeting details. Have a look at the Join Microsoft Teams Meeting link (but do not click it now) – this is the link that you and your invited participants will use. Click Close

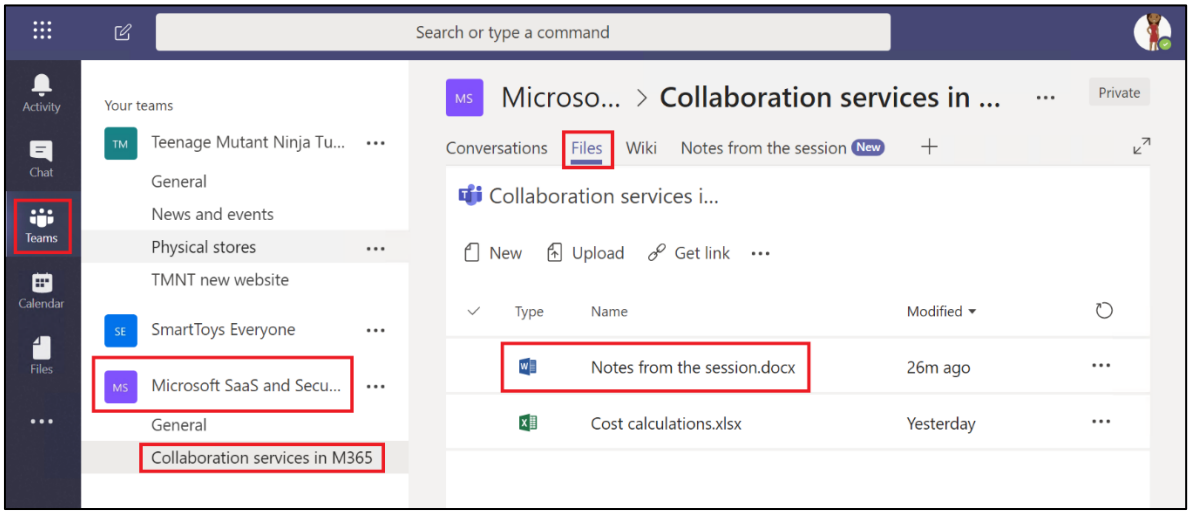


A meeting invite has been sent to the participants email addresses.

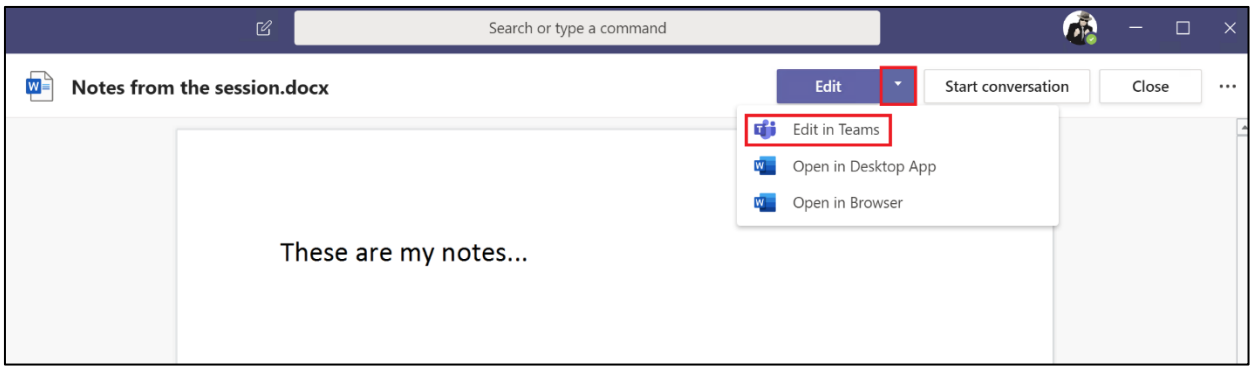
4. Go to your (and the other meeting participants) calendar in Teams and find the meeting (it will show as “tentative” for those who have not accepted, but it will be there)
5. Open your (and the other meeting participants) calendar in Outlook and find the meeting – it will be there, meaning that it is synchronized with the Teams calendar (again, it will show as “tentative” for those who have not accepted, but it will be there)

Explore co-authoring

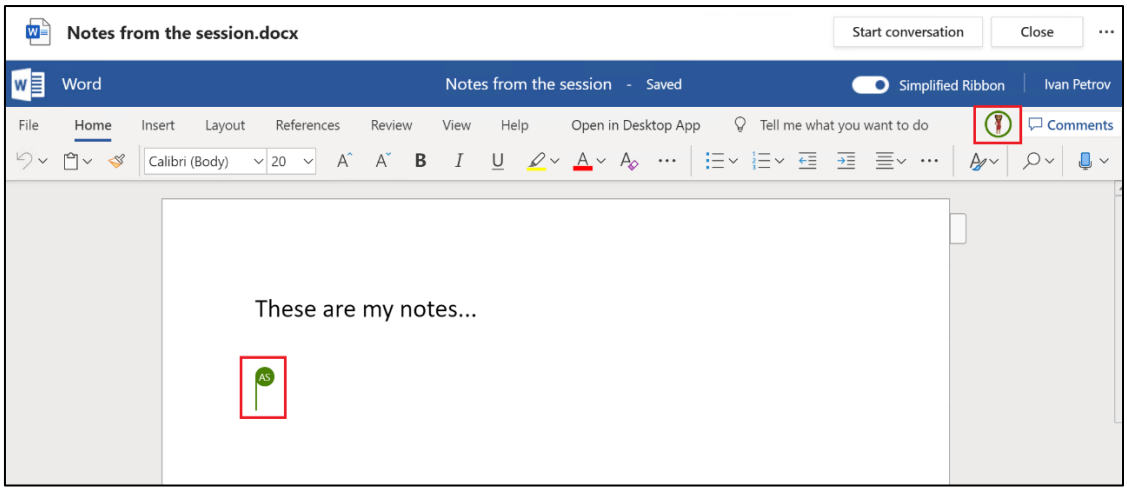
1. Login with one of the users, members of the Team. Go to Teams, select the Microsoft SaaS and Security team, select one of the channels (which has documents), go to Files and click on one of the files



2. Using another browser (or “Incognito” browsing) login with another Team member and repeat the same steps, opening the same document.
3. In both sessions, click the arrow next to Edit and select Edit in Teams



4. Both users are now editing the same document simultaneously. There are some signs for this – for example, in the upper right corner of the document you will see the picture (if any) of the other person/people editing the document. Or inside the document, you will se the initials of the other people, meaning that their cursor is exactly at this place at this moment



Note: Remember, these documents are actually stored in the SharePoint site, belonging to this Team. This means that you can go there and view or restore a previous version of any document, for example.

You have completed LAB 3.