# SharePoint Online Administrator Playbook

A step-by-step approach to SharePoint Online administration

**Deviprasad Panda** 



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## **Dedicated to**

My parents elder brother **Prabhu Prasad Panda** younger brother **Hara Prasada Panda** wife **Saranga** and Lord Jagannath – most important in my life Thanks for everything you do

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Most importantly, I believe we need blessings from Lord Jagannath to share true values with society and grow together. I strongly believe that without god's blessings, nothing is possible.

Finally, I thank the BPB team for giving me this wonderful opportunity to write my first book for them. Thank you!

## Preface

We are moving very fast towards the digital world. The digital revolution and content is important to manage content effectively, make content secure, targeted, collaborate more to work together to save cost, time, and improve quality with more productive works. SharePoint is the giant of collation tools when managing everything related to content comes into the picture. SharePoint online by Microsoft is one of the finest softwares as a solution service that provides smart features and keep on upgrading tools, rolling out new features to manage content smartly, with more security.

The primary goal of this book is to provide a clear concept of SharePoint online administration settings step-by-step, so that even a new user having no SharePoint subscription can learn and understand better. The book covers all SharePoint admin center settings, like a user manual or field guide that admin can follow to administer SharePoint online, with very simple words but advanced level production task experience as outcome. Every setting in SharePoint is covered with screenshots, so there will not be any problem if you are not accessing the admin center. You will not face any problem since all images are taken considering user understanding step-by-step. This book is divided into 13 chapters, and it provides a detailed description on SharePoint online administration to an advanced level. Over the 13 chapters in this book, you will learn the following:

**Chapter 1: SharePoint Admin Center Home** - Covers, introduction to SharePoint admin center, accessing SharePoint admin center, accessing Microsoft 365 admin center, SharePoint admin center tour, scope of administrator.

**Chapter 2: Site Administration** - Covers about the active sites, creating site with a modern approach, export site information, search sites, views, manage membership, hub, sharing, delete site, edit site, your recent actions, storage, deleted site, restore site, permanently delete site.

**Chapter 3: Policies Administration** - Covers specifics about policies administration, content sharing settings, access control settings.

**Chapter 4: Settings** - Focusing specific to home sites, notifications, pages, site creation, site storage limits, application management, stream app launcher tile, OneDrive notifications, retention, storage limit, sync, classic settings page.

**Chapter 5: Content Services** - Covers introduction to managed metadata, term store administration, content type gallery administration.

**Chapter 6: Migration** - Describes about file shares to microsoft 365 migration, install Microsoft 365 agent, connect migration agent to Microsoft 365 tenant, add source path, scans, migration, agents, stream classic to Microsoft 365 migration, Google Workspace to Microsoft 365 migration.

**Chapter 7: User Profiles Administration** - Covers more features, people management, and My Site Settings management.

**Chapter 8: Search Administration** - Focus specific to manage search schema, manage search dictionaries, query suggestion settings, manage result sources, manage query rules, remove search results, view usage reports, search center settings, export search configuration, import search configuration, crawl log permissions.

**Chapter 9: App Administration** - Focuses specifically on SharePoint store, manage apps, API access, app requests, and more features.

**Chapter 10: BCS Administration** - Focuses specifically on how to manage BDC models and external content types, manage connections to online services, and manage connections to on-premises services.

**Chapter 11: Secure Store Administration** - Focuses specifically on how to create new target application, set credential for target application, edit target application, delete target application.

**Chapter 12: Record Management Administration** - Describes how to create send-to connections, edit or remove connection.

**Chapter 13: Hybrid Picker** - Explains how to run hybrid picker, hybrid OneDrive, hybrid sites, hybrid app launcher, hybrid business to business sites, hybrid self-service site creation, hybrid taxonomy and content type, hybrid search.

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# CHAPTER 1 SharePoint Admin Center Home

## Introduction

Every software application has a central location to manage or control all the settings or configurations in a single place. For example, we can manage the settings of Windows 10 operating system from the **All Settings** option. Similarly, in SharePoint on-premises, **Central Administration** is the central location to manage all settings or configurations. In SharePoint online, it is called **SharePoint admin center**. You will find all settings in the SharePoint admin center to configure and manage SharePoint sites centrally at one place. The admin center home page will be the landing page in the SharePoint admin center. In this chapter, we will discuss the settings available in the admin center and a few more basic information.

## Structure

In this chapter, you will understand the following topics:

- Introduction to SharePoint admin center
- Accessing SharePoint admin center
- Creating Office 365 account
- SharePoint admin center tour

- Microsoft 365 active users report
- Scope of administrator

## Objectives

By the end of the chapter, you will get a clear understanding of SharePoint admin center. You will also learn how to create an Office 365 account and navigate the SharePoint admin center. This chapter will help you learn how to set up the default domain, primary email address, and username. The types of roles available in the Microsoft 365 admin center, the SharePoint Online administrator roles and responsibilities, and how to assign SharePoint admin roles will also be discussed. After you complete reading the chapter, you will clearly understand the user interface and different options available in the SharePoint admin center.

## Introduction to SharePoint admin center

SharePoint is based on sites with one top-level site, and multiple subsites below that toplevel site. Under each subsite, we can create multiple subsites, and this hierarchy continues. In SharePoint online, the first site is the SharePoint admin center which the administrators can access through a specific URL. The SharePoint Online Administrator creates multiple sites in the Admin center, called **Site** (Site collection in SharePoint On-Premises), that remain at the top level in the site hierarchy accessible by the end users. If any requirement comes to create a top-level site in SharePoint Online, then you understand it is a new Site request (site collection requirement in SharePoint On-Premises). If you think from a site point of view, the site will be end-users facing, but the SharePoint admin center is isolated from the end-users and limited to administrators only.

Once the site is created, users are added or assigned to it to access the site. The users or user properties in SharePoint are managed by a specific service. Once this service is configured, only end users will be available to be added to sites. So, this service is considered as a backend task. Settings to manage user properties are available in the SharePoint admin center only.

The end users contribute content, create records, search content on-site, access apps, and access external content from SharePoint sites. All these activities are end-user-facing but are configured and managed from a central location at the backend, called the **admin center**. These backend activities are administrator-facing tasks, so the end-user cannot access these settings. Many service configurations are managed from the backend to make the features available for end-users. Now, you must have a clear idea that **SharePoint admin center** is the central location or site where administrators can configure and control all backend services and features.

## **Accessing SharePoint admin center**

SharePoint Online is included under **Software as a Service (SaaS**). Services under SaaS can be accessed over the internet with web browser, anytime, anywhere using any device. Organizations do not need to worry about infrastructure, software, maintenance, and so on. All data resides in the service provider's data center. In the traditional organizational process, each software, such as SharePoint, Exchange, office applications, and so on, has an on-premises environment in its organizations' data center. Now, these on-premises servers reside in a Microsoft data center and are configured to make this software available as a service through the internet using a browser with added security and compliance. An organization needs to take subscriptions and charges applied based on the type of services and usage. If SharePoint Online is included in that subscription, we can only access the admin center.

## **Creating Office 365 account**

Different services are bundled up and called **Office 365**. There are several types of plans in Office 365 based on the various types of services offered. The organization needs to subscribe to a plan. This section will explain the background of making SharePoint admin center available. Let us perform the following steps to subscribe to Office 365 plan:

 If you search for Office 365 plans for enterprise in Google, you will get the option to navigate the URL https://www.microsoft.com/en-in/microsoft-365/ enterprise/compare-office-365-plans. Check plans and proceed to Buy now, any one of the plans, as per your requirement, as seen in the following screenshot:



Figure 1.1: Office 365 plans

2. Once you click on **Buy now**, you will be redirected to another page to set up your account. On the right of the page, you will find the list of services included in the selected plan. The first step to proceed with account setup is entering the e-mail ID. For example, enter mail ID **support@spmcse.com**, and click on **Next**, as shown in the following screenshot:



Figure 1.2: Set up your account

3. The mail ID will be verified on the backend to confirm whether any office account exists with this mail ID. If there is no office account linked to that mail ID, you will see options to confirm (**Not you?**) and proceed to the next step of account creation by clicking on **Set up account** as shown in the following figure:



Figure 1.3: Existing Office 365 account validation

If any office account is already linked to that mail ID, then you will be asked to **Sign in** or **Create a new account instead** as shown in the following figure:



Figure 1.4: Sign into existing Office 365 account

4. Let us consider a mail ID which is not linked to any office account. In that case, click on Set up account. You will get an option to fill in details about yourself. Enter Name, Valid Business phone number, Company name, Company size, and Country or region. Click on Next as shown in the following figure:

Thar	nk you fo	r choosii	ng <b>Of</b>	fice	365	<b>E</b> 3
1	Signup sta	rted				
2	Tell us abo	ut yourself				
	First name Deviprasad	Middle name	Last name Panda			
	Business phone nu 7(5	umber				
	Company name BPBOnline	Company size 1000+ peo		~		
	Country or region India			~		
	Next					
3	Create you	ır business i	dentity			
(4)	You're all se	et				

Figure 1.5: Fill details about yourself

5. The next step is OTP verification which can be in the form of Text or Call. Select the mode of OTP verification method, and click on **Send Verification Code** as shown in the following figure:

Thar	nk you for choosing <b>Office 365 E3</b>
(1)	Signup started
2	Tell us about yourself
	A text or phone call helps us make sure this is you. Enter a number that isn't VoIP or toll free.
	Text me Call me
	Code (+91) India Phone number
	We don't save this phone number or use it for any other purpose.
	Send Verification Code
(3)	< Go back Create your business identity
(4)	You're all set

Figure 1.6: Send verification code