

LEARNING MADE EASY



Microsoft® 365 Business for Admins

for
dummies[®]
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Drive collaboration with
built-in tools

Be productive and keep your
technology current

Safeguard your data on
all your devices

Jennifer Reed



Microsoft 365 Business for Admins

by Jennifer Reed

for
dummies[®]
A Wiley Brand

Microsoft 365 Business for Admins For Dummies®

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Introduction

To be productive and successful in today's modern computing world, where instant sharing and immediate feedback are the new standards, organizations and teams need to respond to new information with agility and speed. The way we work today is more iterative and collaborative than ever before. This reality is driving the need for small- and medium-size businesses to figure out ways to improve workplace productivity.

Small businesses must also deal with the omnipresence of mobile devices — owned by the company or the employee — in the workplace. And just because your employees are at work doesn't mean that they don't use their mobile devices for personal purposes. If you have a habit of checking Facebook, Twitter, or Instagram at least 14 times a day, you know what I mean.

Against this backdrop, small businesses must also contend with today's threat landscape. With a limited budget and a highly competitive job market for security professionals, it's not unusual for some business owners to find it easier to just bury their heads in the sand and hope they don't get hacked. I think we can agree that this is not a good idea.

For a market that accounts for 66 percent of net new jobs in the United States and powers the economy with their labor force and capital expenditures, small businesses are long overdue for an enterprise-class solution that doesn't break the bank.

If you're running a small business or managing the IT infrastructure for a small business, your wait is over. Microsoft 365 Business is here. It's the coming together of three key cloud services from Microsoft: Office 365, Enterprise Mobility + Security, and Windows 10 Business. It's not your parent's solution, either. It has artificial intelligence, machine learning, and advanced features that used to be out of reach for small business. And the best part about Microsoft 365 Business? Even dummies can use it.

About This Book

The intent of *Microsoft 365 For Admins For Dummies* is to provide SMBs an understanding of the capabilities of Microsoft 365 Business: an integrated solution with built-in security and collaboration features to enable today's modern workplace.

For business owners, this book will provide peace of mind knowing that their workforce can manage their work productively and securely across devices. For IT teams, this book is a timely source of information about the features and functionalities as well as guidance on implementing the solution. For end users, this book serves as a guide for making the most out of the company's investment in the technology.

Microsoft 365 For Admins For Dummies serves as a rich resource for all the components included in Microsoft 365 Business and the purpose they serve. I call out the dependencies across the components to ensure that the reader is aware of issues that may arise when implementing or using the solution.

I include insights and real-life scenarios based on my experiences as a consultant and solution architect with over 10 years' experience in the industry. It is written in the *Dummies* format, which breaks down a highly technical subject matter into easily understood concepts.

If you're planning to implement Microsoft 365 Business or to upgrade to Microsoft 365 Business, you've picked up the right book to help demystify the complexities of the bundled solution and set you up for a successful deployment of the solution.

Foolish Assumptions

This book is written for the benefit of the novice or intermediate IT admin who wants to implement and manage a cloud solution for a small business organization. I assume some basic knowledge of the tasks and responsibilities of an IT team. In addition, a senior-level IT professional might glean some nuggets on the end user experience as well as insights into driving technology adoption.

Icons Used in This Book

The familiar *For Dummies* icons are used in this book to spotlight notable topics through visual cues. The following icons are used in this book.



TIP

The Tip icon is your cue for shortcuts or guidance to doing things more quickly or easily.



REMEMBER

The Remember icon marks information that's especially important to know and provides insights into the nuances of Microsoft 365 Business, an evolving cloud solution.



TECHNICAL
STUFF

The Technical Stuff icon marks information of a highly technical nature that you will inevitably encounter as an IT admin. I have, however, used layman's language as much as possible.



WARNING

The Warning icon tells you to watch out! It marks important information that may save you from the pitfalls of implementing a new cloud technology..

Beyond the Book

As a software-as-a-service offering, Microsoft 365 Business is updated and improved on a regular basis. Here are some links to stay up to speed on the goings-on of Microsoft 365 Business:

- » **Cheat Sheet:** Visit www.dummies.com/cheatsheet/microsoft365business for a cheat sheet to help you take advantage of the features and functionalities of Microsoft Business 365.
- » **Author's Amazon Page:** Read about the latest features of the service from my Amazon.com author's page at www.amazon.com/author/jennreed.

Where to Go from Here

Novice IT admins will find it helpful to read the pages of this book in order because some instructions in later chapters point back to configuration instructions in earlier chapters. But if you want to jump right into a chapter that interests you most, go right ahead! I've pointed out the location for prerequisite information where needed to provide you with additional context.



Transforming the Small Business

IN THIS PART . . .

Understand how a multi-generational workplace is influencing the way we work.

Take advantage of cloud technologies to shift from a traditional to a modern IT environment

Get an overview of the Microsoft 365 solution, the services it includes, and the licensing model for the solution.

Grow your business by using built-in business applications in Microsoft 365 Business.

- » Addressing the productivity needs of the four cultural generations
- » Moving to a modern IT environment
- » Committing to safeguarding business data

Chapter **1**

Understanding the New World of Work

Today's computing environment has leveled the playing field for small businesses. The availability of fast Internet connections has afforded entrepreneurs access to technologies typically only used by big corporations with huge IT budgets. As major cloud service providers compete for market share, a top priority is answering the technology needs of small and medium size businesses (SMB). Sophisticated productivity and security solutions that used to be reserved for large enterprises with huge IT budgets are now available as cloud services at prices within the reach of even a mom-and-pop store.

Against this backdrop, you can see how it's an exciting time to start a new or manage an existing small business. The days of using free email services full of ads that do nothing to promote a company's brand are far behind us. For the cost of a cup of coffee, you can pay for a full month's subscription to the same email solution that Fortune 500 companies are using.

If yours is a startup business, you're in luck. Without the baggage from the olden days of running an IT infrastructure, you can immediately launch a born-in-the-cloud startup with funding and support from major cloud services providers. Microsoft for Startups (<https://startups.microsoft.com/en-us/program-details/>), for example, provides product, technical, and go-to-market benefits to start-up entrepreneurs to help accelerate their growth.

Now that cloud computing and the use of personal mobile device in the workplace are becoming mainstream, small businesses have even greater opportunities to compete with the big guys — on a global scale. These opportunities, however, require a change in how you work and how you run a business. And with these changes come challenges.

This chapter lays the foundation for small businesses to start their journey into the new world of work. It covers current productivity and security trends and provides guidance and best practices for taking advantage of the cloud to grow a small business without falling prey to security challenges in today's threat landscape.

Creating a Productive Workplace

Baby boomers (1946–1964), Gen X (1965–1979), Gen Y (Millennials, 1980–1994), and now Gen Z (Centennials, 1995–2012) are the four cultural generations now converging in the workplace. If you think simply having a cookie-cutter approach for driving productivity in the workplace is all that's needed, think again.

Consider this. Baby boomers grew up during a time of prosperity and see work as a 9-to-5 career until retirement. Gen Xers, on the other hand, have the highest level of education in the US, saw the fall of the Berlin Wall and the tragedy of Tiananmen Square, and see work as a contract — just a job. Millennials grew up with a computer and the initial stages of Internet at home. They do best in a flexible work arrangement and will account for 50 percent of the workforce by 2020. Centennials are the multitasking fiends, super-connected kids who can troubleshoot a baby boomer's cell phone while building a website and Snapchatting with a friend.

With such a diverse workforce and different work styles, businesses need to figure out a way to provide a flexible and productive work environment while ensuring data privacy and security. The best way to address this challenge is to embrace cloud technologies and adopt a business strategy to run a secure and productive enterprise.

Realizing the value of Microsoft 365 Business

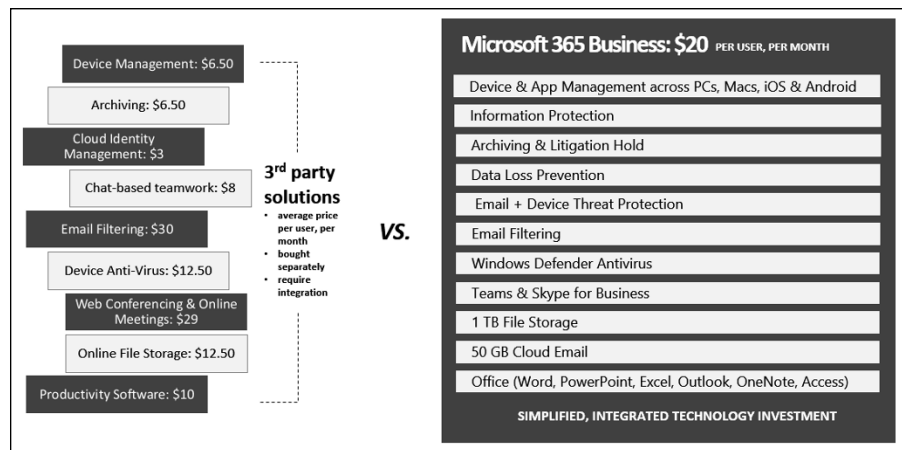
Bring your own device (BYOD), touchdown stations, outcome-driven versus process-driven goals, flexible work arrangements, and data security and governance are just a few of the catchphrases you hear at work today. As businesses

shift from the old-school approach to a modern workplace, they do not need to spend a lot of money and procure several solutions from different vendors.

Microsoft 365 Business is a complete, intelligent, and secure solution delivered through the cloud that empowers employees to be productive with tools built for teamwork but designed to fit individual work styles. With one subscription, an employee gets a comprehensive productivity, security, and device management toolkit that doesn't require expensive consultants and highly trained systems engineers to implement.

Figure 1-1 provides a high-level comparison between several stand-alone solutions versus the bundled Microsoft 365 Business solution. Clearly, SMBs can benefit from the cost-effective, simplified, and integrated solution Microsoft 365 Business offers.

FIGURE 1-1:
Stand-alone
solutions versus
Microsoft 365
Business.



Promoting teamwork in a diverse workforce

We all work differently and have our own preferred method for communication and collaboration. In a team with representation from all four cultural generations, you could end up with someone who prefers phone calls, another who prefers email, someone else who thinks anything other than instant messaging is lame, and yet another team member who mainly communicates with emojis and office memes.

Lucky for you, Microsoft 365 Business has a way to bring all these people together with a universal toolkit for collaboration: Office 365.

Office 365 comes with four key workloads, or services:

- » **Exchange Online** powers email, calendar, tasks, journaling, and more. It has built-in intelligence to protect users from phishing, spoofing, and so on.
- » **SharePoint Online** provides online storage with built-in capabilities for real-time co-authoring and data protection. OneDrive for Business is part of this workload.
- » **Microsoft Teams** (soon to replace Skype for Business) serves as a digital collaboration hub for online meetings, web conferencing, instant messaging, and more.
- » **Office ProPlus** includes the familiar Office desktop applications: Word, PowerPoint, Excel, Outlook, OneNote, and Access.

In addition to these key workloads, Office 365 includes productivity and security tools that integrate seamlessly across the entire suite of services. Following is a partial list of services included in Office 365:

- » **Delve and Yammer** help you identify people in your organization with certain expertise.
- » **Office 365 Groups** automatically gives team members a shared mailbox, file folder, and notebook.
- » **StaffHub** is a retail store's solution for managing shift schedules for workers or associates, allowing them to share files, swap schedules, and connect to company resources.
- » **Stream** is your YouTube at work. You can upload and view videos, create channels for your team, and even watch videos with transcripts and closed captions.



WARNING

Putting together a complete list of services is challenging because Office 365 is a software-as-a-service (SaaS) offering and Microsoft is constantly rolling out new features. Stay on top of notifications you receive from Microsoft regarding updates to the service. In that way, you will know about new features and will be prepared for functionalities scheduled for retirement or deprecation.

If you're wondering how you could possibly use all these services, consider the scenario on Figure 1-2. On any given day, an employee in a modern workplace can work smarter by using at least four capabilities in Office 365.

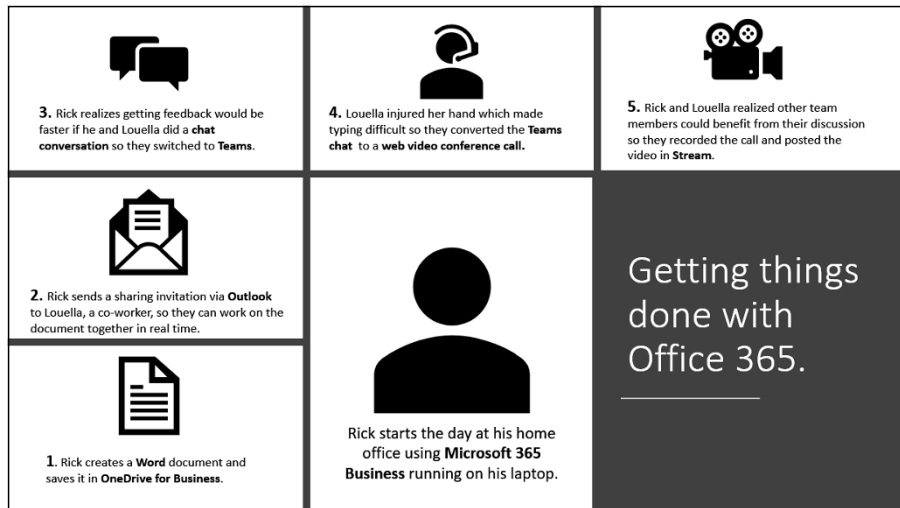


FIGURE 1-2:
How modern workers collaborate in Office 365.

Keeping Business Technology Current

Running a small business is no small feat. Some people have the mistaken belief that start-up entrepreneurs live glamorous lives. I'll never forget a comment from a former colleague when she learned I had started my own IT consulting firm. She exclaimed, "That's awesome! You must sleep in a lot."

I almost choked trying not to burst out laughing at the suggestion that someone running an IT consulting company would routinely enjoy leisurely sleep-in mornings. Anyone who's ever tried to launch a business knows that sleep is a luxury and never a priority. A small-business owner typically wears many hats. In the first few months of starting my business, for example, I was the salesperson, technical support department, CEO, CFO, marketing department, consultant, and IT director. Wearing all those hats, I never slept late and often didn't sleep at all.

It shouldn't come as a surprise, then, that small businesses tend to deprioritize the work required to keep their technology current. I've met several clients who are still running Windows XP even though support for the operating system ended in 2014. Although the security implications of such an environment are astounding, some businesses just can't find time to update their current systems.

Keeping up with technological changes is disruptive, time-consuming, and expensive. It seems like every time you update your technology, within a few weeks the update is obsolete and the update process must be repeated.

Microsoft 365 Business attempts to address such challenges. The solution is designed to make it easier for SMBs to keep their technology current, minimize the risk for cyberattacks, and reduce the cost of running a modern IT infrastructure so the business owner and employees can focus on the strategic work required to grow the business.

Looking back at traditional IT businesses

Running a small business used to mean working 9 a.m. to 5 p.m., Monday through Friday, with everyone showing up at the same office. Employees were given a company-owned device configured with legacy applications accessible only while at the office. The devices for sales team members may have been configured with a network connection, such as virtual private network (VPN), to allow them to access company resources while out on the field.

A day in the life of an IT admin supporting an SMB typically meant manually configuring devices, providing technical support to users, and reacting to technical updates in the industry. For those running Windows operating system, Patch Tuesdays meant long nights testing, deploying, and resolving issues related to the security patches Microsoft released on the second or fourth Tuesday of each month.

If an SMB didn't have an in-house IT team, scarce dollars were spent on a managed service provider who was usually a lone wolf who may or may not have been available when service was needed.

Running a business today is no longer the same as it was ten or even five years ago. Most SMBs, however, still use the tools, processes, and mindset of a traditional IT environment. Clearly, these SMBs are at a disadvantage when competing with businesses that have adopted a modern IT environment.

Running a modern IT environment

With cloud technologies becoming mainstream, mobile devices turning into a necessity more than a luxury, artificial intelligence pervading our daily lives, and the amount of digital data exploding in the last few years, businesses must transform to stay relevant.

The concept of digital transformation is simply a matter of taking advantage of current technologies to rethink and rework the products and services a business delivers to its customers. Such changes, in turn, alter the processes and strategies by which a business is run.

In many ways, SMBs are better positioned than large enterprises to adopt digital transformation. With fewer hoops to go through in the decision-making process, SMBs have the agility to adopt new and emerging technologies, especially if the cost is budget-friendly.

Most SMB clients I've met were at the forefront in adopting a bring your own device (BYOD) policy. The BYOD model was partly driven by the owners' desire to cut the cost of company-supplied devices. From the employees' perspective, especially the younger generation, being able to use their own mobile devices for work might be a deciding factor in accepting a job offer or not.

Safeguarding Business Data

When you run a business, you deal with data. When you sell to customers, you collect data. When you buy something for your business, you're giving away data. With the possession of data comes great responsibilities. A business is required to follow laws and regulations governing data.

The large amount of data in our connected world has paved the way for big data. *Big data* is simply a huge volume of data that can't be stored or processed in the traditional way. Imagine processing the data from the millions of tweets a day or analyzing the patterns and behaviors of YouTube viewers watching billions of videos every day. That amount of data could provide insights and competitive advantage.

Data is the new business currency. Data is so valuable that hackers want to steal your company data. Do you have a plan in place to safeguard your business data?

Security is everyone's business

Small businesses typically don't have a risk management executive tasked with maintaining the company's information security program. This may not be a bad thing because some employees in big companies have the mistaken belief that data security is the responsibility of the company's information security officer. The reality is that security is everyone's business. When you're a small business and don't have a designated security officer, it's easier to instill a culture of security as everyone's responsibility.

For example, even though an employee might own his smartphone, company emails received on his phone are not free game for social media posting. Or if an employee is trying to fast-track a customer transaction, she shouldn't send a customer's social security number and other personal information through email.

Although technology enable us to accomplish more things faster, it has also increased our exposure to security risks. You can mitigate these risks in many ways, but the best first step is to ensure that everyone in the organization makes a commitment to take security seriously. The shared understanding of that responsibility can then be complemented by the security features in Microsoft 365 Business, such as the ones in the Security & Compliance Center, shown in Figure 1-3.

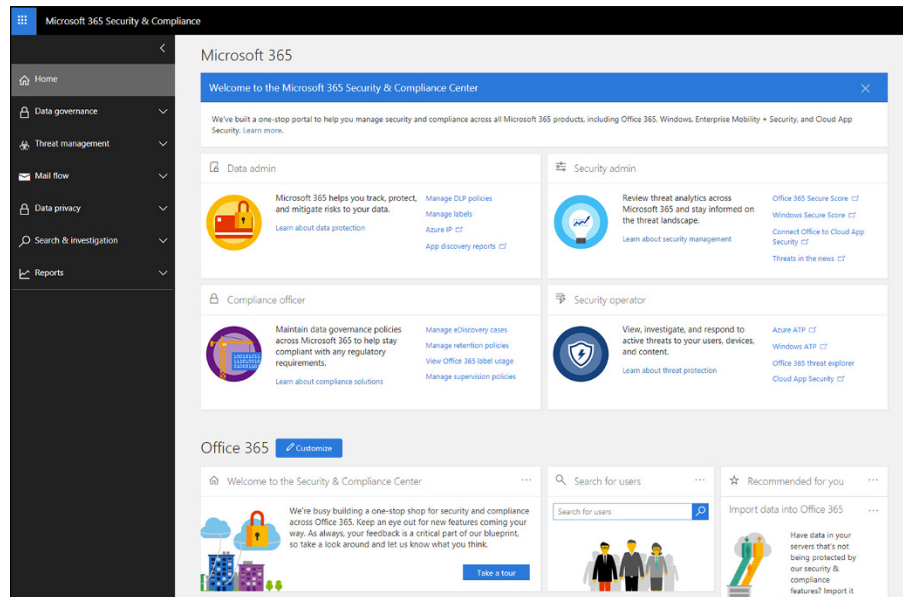


FIGURE 1-3: Microsoft 365 Security & Compliance Center.

Taking a layered approach to security

Implementing security best practices in the workplace doesn't mean just enforcing strong, complex passwords. If you rely on complex passwords, users will simply write them down on a sticky note and tack them on their monitors. Shocker.

Microsoft 365 Business takes a layered approach to security to complement your company's security policies. First, your devices are centrally managed with enterprise-level security features of Windows 10 Business. Features such as Windows Hello for Business and Credential Guard replace passwords with biometrics and facial recognition. Malware can be eliminated with Secure Boot, Device Guard, and Windows Defender. In addition, sensitive data can be automatically encrypted with Windows Information Protection.

You get protection from hidden threats in email and attachments in emails or embedded in Office files by using the built-in security features in Office 365 Advanced Threat Protection.



TIP

It may seem as though I am venturing out of Microsoft 365 Business territory when I start writing about Microsoft Azure. However, both technologies are provided by Microsoft, so they work well together. For example, you can prevent data leaks by ensuring that sensitive information such as social security numbers and credit card information aren't shared outside your company by using Azure Information Protection. You can also manually or automatically encrypt an email or a file with this service and even control who has access to the information by applying restrictions such as do not copy or do not forward.

These security features are just the beginning in terms of what you can do to safeguard your data in Microsoft 365 Business. Microsoft has already done the heavy lifting by figuring out 80 percent of the common security configurations that apply to small businesses. Your IT admin can customize the other 20 percent to fit your specific company requirements.

- » Determining which Microsoft 365 plan is right for your business
- » Managing the Microsoft 365 Business environment
- » Contributing to your business growth with Microsoft 365 apps

Chapter 2

Getting to Know Microsoft 365 Business

If I had wanted a drone 12 years ago, I would have had to come up with \$100,000. Lucky for me, the cost of drones declined so much and so rapidly that I finally got one as a birthday present from my husband and son last year. The cost of the drone? \$100. Watching our puppy run in circles in our backyard chasing the drone overhead? Priceless.

Drones are just one of the key technologies that has seen a drastic drop in prices in a short time span. According to a white paper published by the World Economic Forum, 3D printing used to cost an average of \$40K in 2007. Seven years later, that price dropped to \$100. In 1984, the average cost for solar power per kilowatt hour was \$30. In 2014, that cost went down to 16 cents.

The astounding drop in prices for these and other advanced technologies underscores just how rapidly our world is changing. Moreover, affordable smart devices have made us increasingly connected. With an estimated 1 trillion devices connected to the Internet by 2030 and the mainstreaming of science-fiction-like technologies such as artificial intelligence, businesses of all sizes will have no choice but to adapt to the changing digital landscape to succeed or simply survive.

At home and in the workplace, we are already seeing humans and machines working together to drive efficiency. For example, my Echo Dot (a hands-free,

voice-controlled device from Amazon) and I get along well — especially in the morning while I get ready to go to work — when it tells me the top news, the weather, and the traffic on my commute route, and even attempts a lame joke. The Echo Dot does all that from a simple “Alexa, start my day” voice command.

These technological advancements dictate that even a small business needs to have a technology strategy just like its big brother, the enterprise. SMBs need to reevaluate legacy systems that require a lot of maintenance, out-of-support platforms rife with security holes, and fragmented productivity solutions that started out free but ended up costing a lot of money to integrate.

This chapter outlines the value proposition of Microsoft 365 Business and how the solution can help define the technology strategy of an SMB (small- to medium-sized business). I provide guidance for integrating a few of the recent technological innovations into the workplace. I also clarify the use case between the Business and Enterprise editions of Microsoft 365 to enable small-business decision makers to make the right purchasing choice.

Understanding the Microsoft 365 Plans

Although a small business and a large enterprise operate differently, common trends in the workplace affect any organization’s capability to achieve its goals.

The influx of Millennials drives the demand for flexible work arrangements, workspaces that lend themselves to easy interactions, and the use of personal mobile devices. Today’s employees demand an open flow of information and quick access to company data anywhere and anytime so they can get things done. In addition, we see a prolific cottage industry of bad actors and almost daily news about security breaches.

These trends are the impetus for Microsoft 365. Delivered through the cloud, Microsoft 365 simplifies the complicated tasks IT admins would have to perform to run a modern IT environment.

Microsoft 365 is available in two types of plans for businesses: Business (300 or fewer users), and Enterprise (more than 300 users).

Although the focus of this book is on the Business plan, it’s helpful to understand the feature sets in the Business and Enterprise plans to inform procurement decisions, especially because an organization might have a mix of both types of plans.