



# Managing Microsoft Teams

Exam Ref MS-700

Ed Fisher

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Ed Fisher

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*I dedicate this book to my wife Connie, who gave me the time,  
encouragement, and support to do this all again.*

—ED FISHER

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# Contents at a glance

	<i>Introduction</i>	<i>xiii</i>
<b>CHAPTER 1</b>	<b>Plan and configure a Microsoft Teams environment</b>	<b>1</b>
<b>CHAPTER 2</b>	<b>Manage chat, calling, and meetings</b>	<b>77</b>
<b>CHAPTER 3</b>	<b>Manage Teams and app policies</b>	<b>129</b>
	<i>Index</i>	<i>159</i>

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# Contents

<b>Introduction</b>	<b>xiii</b>
<i>Organization of this book</i>	<i>xiii</i>
<i>Preparing for the exam</i>	<i>xiii</i>
<i>Microsoft certifications</i>	<i>xiv</i>
<i>Quick access to online references</i>	<i>xiv</i>
<i>Errata, updates, &amp; book support</i>	<i>xv</i>
<i>Stay in touch</i>	<i>xv</i>
<b>Chapter 1 Plan and configure a Microsoft Teams environment</b>	<b>1</b>
Skill 1.1: Upgrade from Skype for Business to Microsoft Teams . . . . .	1
Choose an appropriate upgrade path and coexistence mode to meet specific requirements	2
Plan and troubleshoot meeting migration	8
Configure Microsoft Teams upgrade notification and meeting app preferences	9
Configure coexistence mode for the organization and per-user	10
Use Teams Advisor to assess and identify steps to roll out Microsoft Teams	10
Skill 1.2: Plan and configure network settings for Microsoft Teams . . . . .	12
Plan for successful network deployment by using Network Planner	13
Calculate network bandwidth capacity for Microsoft Teams voice, video, meetings, and live events	16
Assess network readiness by using Network Testing Companion	17
Configure network ports and protocols used by the Microsoft Teams client application	19
Configure media optimizations by using QoS	21
Skill 1.3: Implement governance and lifecycle management for Microsoft Teams . . . . .	23
Create and manage team templates	23
Set up policies for Microsoft 365 group creation	25
Configure Microsoft 365 groups, expiration policy, and naming policy	26

Archive, unarchive, delete, and restore a team	29
Configure and manage update policies	31
Skill 1.4: Configure and manage guest access . . . . .	31
Configure guest users for Microsoft Teams	32
Configure guest permissions for a team	36
Configure meeting and live events experiences for guests	37
Configure messaging and calling options for guests	38
Remove guests	40
Manage Azure AD access review for guests	40
Configure guest access from Azure AD portal	44
Skill 1.5: Manage security and compliance . . . . .	45
Assign Microsoft Teams Admin roles	45
Create and manage compliance features, including retention policies, sensitivity labels, and data loss prevention (DLP) policies	47
Create security and compliance alerts for Microsoft Teams	53
Create an information barrier policy	53
Skill 1.6: Deploy and manage Microsoft Teams endpoints . . . . .	55
Deploy Microsoft Teams clients to devices, including Windows, VDI (Virtual Desktop), Windows Virtual Desktop (WVD), MacOS, and mobile devices	55
Manage configuration profiles	56
Manage Microsoft Teams device tags	57
Manage device settings and firmware	58
Configure Microsoft Teams Rooms	59
Skill 1.7: Monitor and analyze service usage . . . . .	60
Interpret Microsoft Teams usage reports	61
Interpret Microsoft 365 usage reports	62
Optimize call quality by using Call Analytics	63
Analyze organization-wide call quality by using Call Quality Dashboard	65
Use Power BI to identify call quality issues	67
Chapter summary . . . . .	68



Manage calling policies	119
Manage caller ID policies	120
Interpret the Direct Routing health dashboard	121
Chapter summary .....	123
Thought experiment.....	124
Thought experiment answers .....	126
<b>Chapter 3   Manage Teams and app policies</b>	<b>129</b>
Skill 3.1: Manage a team.....	129
Create a team	129
Upgrade an existing resource to a team	135
Manage privacy levels for a team	138
Manage org-wide teams	139
Create and manage policy packages in Teams	140
Skill 3.2: Manage membership in a team .....	142
Manage users in a team	142
Configure dynamic membership	145
Manage access reviews for team members	148
Skill 3.3: Implement policies for Microsoft Teams apps.....	151
Manage org-wide app settings	151
Create and manage app permission policies	153
Create and manage app setup policies	154
Manage app store customization	155
Chapter summary .....	155
Thought experiment.....	156
Thought experiment answers .....	157
 <i>Index</i>	 159

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**ED FISHER** is a Principal Technical Specialist at Microsoft, currently covering Microsoft Teams. He's been with Microsoft for over 10 years, in various roles, all covering some aspect of Microsoft 365. A former bean counter, in 1997 he figured out that IT is way more interesting than balance sheets and has been a self-professed geek ever since. You can reach out at <https://aka.ms/edfisher>.

# Introduction

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**M**ost books take a very low-level approach, teaching you how to use individual classes and accomplish fine-grained tasks. Like the Microsoft MS-700 certification exam, this book takes a high-level approach, building on your knowledge of and experience with administering Microsoft Teams, extending that into every area covered by the exam, including those not everyone currently using Microsoft Teams may have touched.

This book covers every major topic area found on the exam, but it does not cover every exam question. Only the Microsoft exam team has access to the exam questions, and Microsoft regularly adds new questions to the exam, making it impossible to cover specific questions. You should consider this book a supplement to your relevant real-world experience and other study materials. If you encounter a topic in this book that you do not feel completely comfortable with, use the “Need more review?” links you’ll find in the text to find more information and take the time to research and study the topic. Great information is available online in docs. microsoft.com, and in blogs and forums.

## Organization of this book

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This book is organized by the “Skills measured” list published for the exam. The “Skills measured” list is available for each exam on the Microsoft Learn website: <http://aka.ms/examlist>. Each chapter in this book corresponds to a major topic area in the list, and the technical tasks in each topic area determine a chapter’s organization. If an exam covers six major topic areas, for example, the book will contain six chapters.

## Preparing for the exam

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We recommend that you augment your exam preparation plan by using a combination of available study materials and courses. For example, you might use the Exam Ref and another study guide for your “at home” preparation and take a Microsoft Official Curriculum course for the classroom experience. Choose the combination that you think works best for you. Learn more about available classroom training and find free online courses and live events at <http://microsoft.com/learn>. Microsoft Official Practice Tests are available for many exams at <http://aka.ms/practicetests>.

Note that this Exam Ref is based on publicly available information about the exam and the author’s experience. To safeguard the integrity of the exam, authors do not have access to the live exam.

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### **NEED MORE REVIEW? ALL MICROSOFT CERTIFICATIONS**

For information about Microsoft certifications, including a full list of available certifications, go to <http://www.microsoft.com/learn>.

Check back often to see what is new!

## Quick access to online references

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Throughout this book are addresses to webpages that the author has recommended you visit for more information. Some of these links can be very long and painstaking to type, so we’ve shortened them for you to make them easier to visit. We’ve also compiled them into a single list that readers of the print edition can refer to while they read.

Download the list at [MicrosoftPressStore.com/ExamRefMS700/downloads](http://MicrosoftPressStore.com/ExamRefMS700/downloads).

The URLs are organized by chapter and heading. Every time you come across a URL in the book, find the hyperlink in the list to go directly to the webpage.

## Errata, updates, & book support

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We've made every effort to ensure the accuracy of this book and its companion content. You can access updates to this book—in the form of a list of submitted errata and their related corrections—at:

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# Manage chat, calling, and meetings

In this chapter, we will look at the administrative tasks and policies associated with managing chat, calling, and meetings. These include enabling the services and configuring policies to control what can, and cannot, be done by end users. This chapter also contains almost everything to do with telephony. Although there are only four main skills in this section of the exam, each one has several topics included, and this section accounts for 30% to 35% of the exam content and may introduce concepts that are new to you if you're not managing telephony now. We will include URLs to helpful sites so that you can dig deeper if you want.

### Skills covered in this chapter:

- Skill 2.1: Manage chat and collaboration experiences
- Skill 2.2: Manage meeting experiences
- Skill 2.3: Manage phone numbers
- Skill 2.4: Manage Phone System

## Skill 2.1: Manage chat and collaboration experiences

---

This skill covers how to manage the chat and collaboration experiences for your users. This topic includes policies controlling what is and is not allowed across instant messaging, external collaboration, within channels, and integration with other services.

### This skill covers how to:

- Configure messaging policies
- Manage external access
- Manage channels for a team
- Manage private channel creation
- Manage email integration
- Configure external access for SharePoint and OneDrive for Business
- Manage cloud file storage options for collaboration

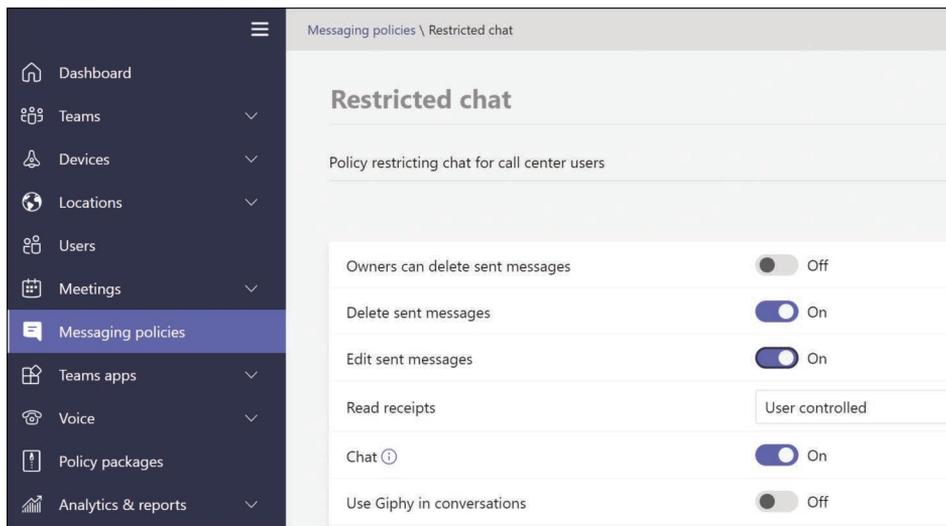
## Configure messaging policies

Messaging policies control what features are available to users of chat and messaging within channels. The Global (Org-wide default) policy will apply to all users unless you create and apply a different policy to others. Although many organizations may need only a single policy, Microsoft Teams is flexible so that you can have different policies based on job type or location.

Messaging policies control all aspects of chat messages, including whether or not users can even use chat, whether messages can be edited or deleted, and what can be included in messages. By default, all users have the Global (Org-wide default) policy applied to them, which enables them to use chat and most features. If your organization needs to be more restrictive, you can modify the Global (Org-wide default) policy. If you need to permit different things for different users, you can create multiple policies to meet your needs. Only one Messaging policy can be applied to any single user, though.

To create a new policy, do the following:

1. Log on to the TAC at <https://admin.teams.microsoft.com>.
2. In the left menu, select **Messaging policies**.
3. Click **+Add** to create a new Messaging policy.
4. Give the policy a name and a description, as shown in Figure 2-1.



**FIGURE 2-1** Creating a new Messaging policy

5. Modify the policy to meet your requirements. You may want to prevent users from deleting or editing messages once sent, turn off URL previews, or turn off Giphy or memes or stickers (but that takes all the fun out of things). Consider what you disable, because it will reduce the functionality for guest users. Figure 2-2 shows a more restrictive policy.

Restricted chat	
Policy restricting chat for call center users	
Owners can delete sent messages	<input type="checkbox"/> Off
Delete sent messages	<input checked="" type="checkbox"/> On
Edit sent messages	<input checked="" type="checkbox"/> On
Read receipts	User controlled
Chat ⓘ	<input checked="" type="checkbox"/> On
Use Giphy in conversations	<input type="checkbox"/> Off
Giphy content rating	Moderate
Use memes in conversations	<input type="checkbox"/> Off
Use stickers in conversations	<input type="checkbox"/> Off
Allow URL previews	<input type="checkbox"/> Off
Translate messages	<input checked="" type="checkbox"/> On
Allow immersive reader for viewing messages	<input checked="" type="checkbox"/> On
Send urgent messages using priority notifications ⓘ	<input checked="" type="checkbox"/> On

**FIGURE 2-2** A restrictive policy

6. When done, click **Save**.

You can assign Messaging policies directly to users, or you can assign them to groups. In either case, you can use the PowerShell cmdlet `New-CsGroupPolicyAssignment`, or you can use the TAC. To use the TAC to assign a Messaging policy to a group, follow these steps:

1. Select the **Group policy assignment** tab.
2. Select **+Add group**.
3. Enter the name of the group, or enough characters to enable the system to determine which group you intend, then select the search icon.

4. From the drop-down list, select the policy you wish to apply, as shown in Figure 2-3.

**Assign policy to group**

Select a group

NH New Hires ×

Select rank ⓘ

1

Select a policy

Restricted chat ▾

Apply Cancel

**FIGURE 2-3** Applying a Messaging policy to a group

5. Select **Apply**.

**NEED MORE REVIEW? WHAT DOES EACH SETTING DO?**

To learn more about what each setting controls, see [https://docs.microsoft.com/en-US/microsoftteams/messaging-policies-in-teams?WT.mc\\_id=TeamsAdminCenterCSH](https://docs.microsoft.com/en-US/microsoftteams/messaging-policies-in-teams?WT.mc_id=TeamsAdminCenterCSH).



### EXAM TIP

Multiple policies can be applied to a user who is a member of more than one group. The Select Rank setting enables you to set a relative precedence so that if more than one policy could apply to a user, the policy with the lowest number is the one that would apply. They are not additive; only one policy can apply.

## Manage external access

In Skill 1.4 we reviewed how to configure and manage guest access. Here, we are going to look at managing external access, which is not the same, and is often referred to as *external federation*.

Guest access with Microsoft Teams controls what users who are invited to (and accept) access resources like Teams or Channels can do. Guest access users will have account objects that appear in your organization's Azure Active Directory. External access users are those in a federated organization who have not been explicitly invited as a guest and who do not have an object in the other organization's Azure AD.

External access controls how users in one organization can find, call, chat, and hold meetings with users in your organization. Table 2-1 compares what users in your organization can do with guests and with external access users by default.

**TABLE 2-1** Your organization's user interactions with guest users vs. external access users

What your users can do with	Guest users	External access users
Interorganizational chat	Yes	Yes
Interorganizational calling	Yes	Yes
Interorganizational presence	Yes	Yes
Interorganizational search	Yes	No
Share files	Yes	No
View interorganizational Out of Office (OOF)	Yes	No
Interorganizational blocking	Yes	Yes

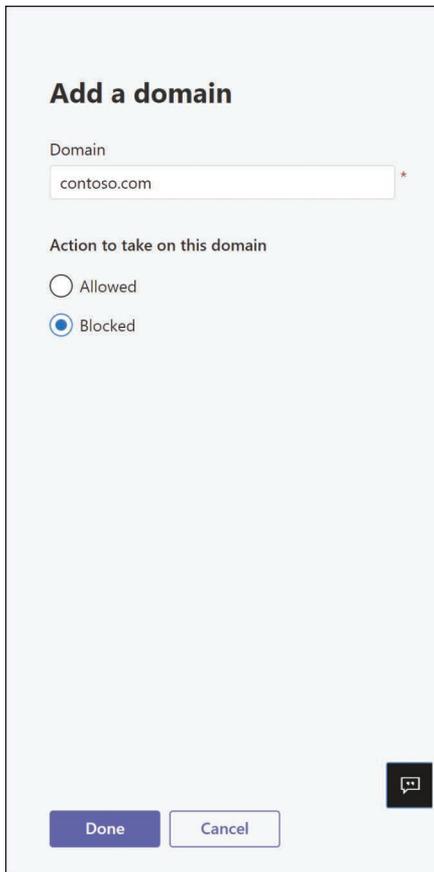
Table 2-2 provides a comparison of what users outside your organization can do within your tenant by default.

**TABLE 2-2** What users outside of your organization can do

What users outside your organization can do	Guest users	External access users
Access Teams resources	Yes	No
Be added to a group chat	Yes	No
Be invited to a meeting	Yes	Yes
Make private calls	Yes	Yes
View the phone number for dial-in meeting participants	Yes	No
Use IP video	Yes	Yes
Use screen sharing	Yes	Yes
Use Meet Now	Yes	No
Edit sent messages	Yes	Yes
Delete sent messages	Yes	Yes
Use Giphy in conversation	Yes	Yes
Use memes in conversation	Yes	Yes
Use stickers in conversation	Yes	Yes
Presence is displayed	Yes	Yes
Use @mentions	Yes	Yes

The default settings for external access help facilitate fuller collaboration, but security policies may require that you restrict some of these settings. External access can be turned completely off or controlled by the Session Initiation Protocol (SIP) domain with permit and deny entries. You can also enable or disable external access with users of the consumer Skype service. To manage external access, do the following:

1. Log on to the TAC at <https://admin.teams.microsoft.com>.
2. In the left menu, expand **Org-wide settings** and then select **External access**.
3. If you wish to disable external access completely, set **Users can communicate with other Skype for Business and Teams users** to **Off**.
4. If you wish to only disable external access with users of the Skype consumer service, set **Users can communicate with Skype users** to **Off**.
5. To either explicitly permit or explicitly deny specific domains, select **+Add a domain**.
6. Add the specific domain DNS name and specify whether to allow or deny it, as shown in Figure 2-4.



**FIGURE 2-4** Blocking a SIP domain

**7.** Select **Done**.

**REAL WORLD YOU CAN ADD BOTH, BUT DON'T.**

Pay attention to the note in the TAC about blocking and allowing. By default, external access is allowed with ALL domains if it is turned on. If you add an ALLOW entry, then that is allowed and ALL others are implicitly blocked. If you add a BLOCK entry, then that domain is blocked but ALL others are implicitly allowed. You can add both BLOCK and ALLOW, but don't. Also remember that external access is a two-way street. If you are explicitly allowing a partner domain, and they have explicit ALLOW entries but forget to include your domain, external access will not work. If you are explicitly allowing them but they are either explicitly or implicitly denying you, external access will not work. And don't forget the DNS SRV records for your domain. If the other domain is either a Skype for Business organization or is in hybrid, the DNS SRV records for your domain are required, even if all your users are 100% in Teams.

## Manage channels for a team

Teams are, at their most fundamental level, collections of people, and within Microsoft Teams, you can create a team for any grouping of people in your organization and for any purpose. Channels exist within a team and can include chat messages, meeting recordings, files, and other tools. Every team has a General channel (that cannot be deleted), and team owners can create other channels at need, either from scratch or by using templates, which we discussed in Chapter 1. Admins can also create and manage both teams and channels within the TAC.

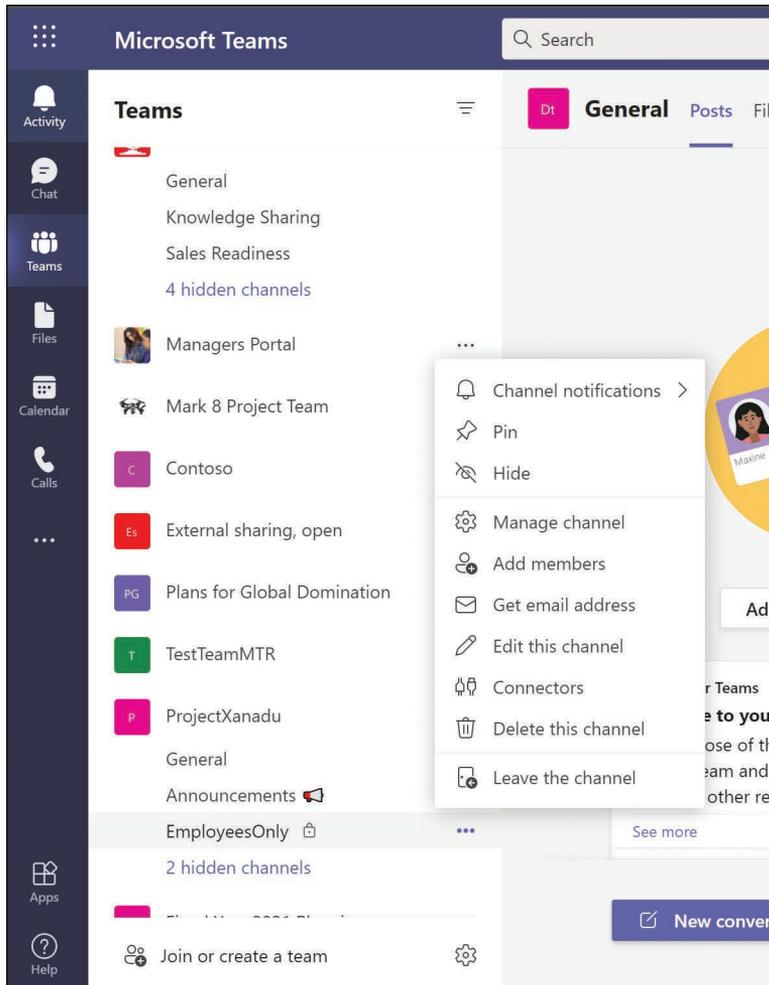
There are two kinds of channels. The first is the standard channel, and these are available to all members of a team. The second is the private channel, and access is restricted to those who are explicitly added to that channel by an owner or an admin. Private channels can be useful within a larger team if you want to have a more private area, such as when you have guests in a team but need an area that is for employees only and do not want to create a separate team.

To manage channels for a team using the TAC, follow this procedure:

1. Log on to the TAC at <https://admin.teams.microsoft.com>.
2. In the left menu, expand **Teams** and select **Manage teams**.
3. Scroll down the list of your teams, or enter part of the name in the Search box to find your team, and then select the name of the team.
4. You can see the list of team members on the **Members** tab. Select the **Channels** tab.
5. To create a new channel, select **+Add**.
6. Name the channel, enter a description, and choose either Standard or Private from the type drop-down list. Then select **Apply**.
7. In the list of channels, select the channel you just created by selecting next to the name so that a check mark appears, then select **Edit**.
8. In this window, you can change the name and the description. You cannot change between private and public. If you make any changes, select **Apply** to save them.
9. While all members of a team have access to public channels, you must explicitly add team members to private channels. To do this, select the name of the private channel.
10. In this window, select **+Add** to add new members. Remember that only existing members of the team can be assigned to a private channel. If you do not see a user you wish to add, go back to the team and ensure they are a member.
11. When finished, select **Apply**.

Channels can also be managed by a team owner in the Teams app or Teams web app. To do so:

1. Log on to Microsoft Teams.
2. On the Teams tab, browse down to your team, or use Search and select your team.
3. Select the ellipsis button (or right-click the team), and you will see options for managing the team, including creating new channels.
4. To manage an existing channel, select the ellipsis button (or right-click the channel) and you will see options for managing the channel, as shown in Figure 2-5.



**FIGURE 2-5** Managing a channel; note the padlock icon, which indicates this is a private channel

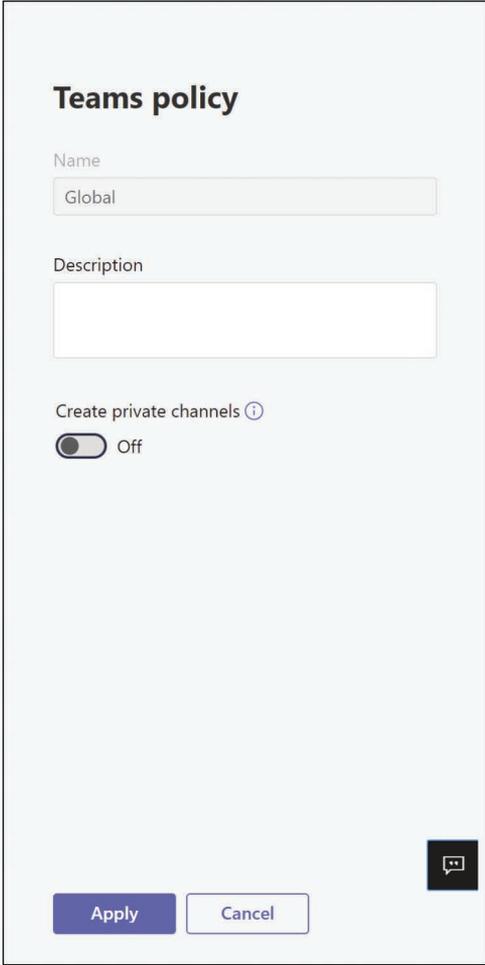
5. Just as in the TAC, you can edit the properties of a channel or add new members to a private channel.

There are limitations to private channels you should consider when using them. They do not support all the connectors and tabs and apps that public channels do. They are not copied to a new team if you create one from an existing team that has private channels. Notifications for activities in private channels are not included in missed activity emails. And perhaps most importantly, at present retention policies are not supported. Messages sent to members of private channels are stored in the members' mailboxes, rather than the team's mailbox. You can, of course, place retention on users' mailboxes and run eDiscovery searches against user mailboxes. But if your organization requires retention on the team content and not on the members, you may need to create a private team, rather than a private channel within an existing team, to meet your needs. One other point of note to be clear on: unlike the team itself, once created, a channel cannot be changed from Standard to Private or vice versa. Another reason to be very deliberate when creating a private channel!

## Manage private channel creation

By default, just as all users can create teams, any owner of a team can create private channels with the teams they own. You can restrict this if necessary by creating a Teams policy to restrict the ability to create private channels and applying it to users. As an admin, you can then create private channels for teams that require them and meet whatever internal guidelines you have in place for this. To restrict private channel creation for your entire organization, do the following:

1. Log on to the TAC at <https://admin.teams.microsoft.com>.
2. In the left menu, expand **Teams**, and select **Teams policies**.
3. Select the **Global (Org-wide default)** policy and then select **Edit**.
4. Set the **Create private channels** switch to **Off**, as shown in Figure 2-6.



The screenshot shows the 'Teams policy' configuration interface. At the top, the title 'Teams policy' is displayed. Below it, there is a 'Name' field containing the text 'Global'. Underneath is a 'Description' field, which is currently empty. The 'Create private channels' section features a toggle switch that is turned off, with the label 'Off' next to it. A help icon (a circle with an 'i') is located to the right of the toggle. At the bottom of the form, there are two buttons: 'Apply' and 'Cancel'. A small Teams icon is visible in the bottom right corner of the form area.

**FIGURE 2-6** The global policy preventing the creation of private channels

5. Select **Apply**.

You can create additional Teams policies and assign them to specific users if you need some users to be able to create private channels and prevent others from doing so.

### **REAL WORLD TEAMS IS CONSTANTLY INNOVATING**

The next big thing coming to Microsoft Teams is Microsoft Teams Connect. Also known as Shared Channels, Microsoft Teams Connect approaches the need to have external collaboration from the opposite direction of private channels by letting you have a team without external members, and create a channel within that team to which you can invite external collaborators directly, without giving them access to anything else in the team. Better still, you won't have to switch tenants to access a Microsoft Teams Connect channel where you are a guest, making cross-org collaboration even easier. Keep an eye open for more on this feature and expect it to be covered in a future revision of this exam.

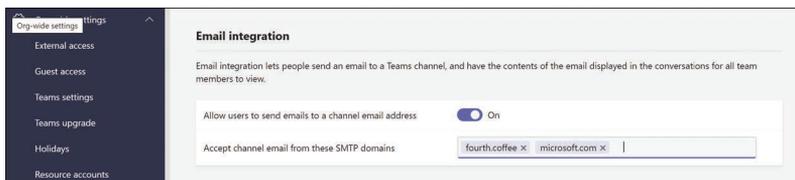
## Manage email integration

By default, each team, and each channel within a team, are assigned an email address that can accept mail. Email sent to the team address will appear in the General channel, as will email sent to the General channel address, whereas email sent to any other channel will appear in the appropriate channel. This can be used for including teams or channels in email blasts, to subscribe to RSS feeds, for SMTP-based alerts, and more. You can restrict email access on an organizational level, on a team level, and at a channel level if necessary.

Email addresses are, by default, assigned to every channel in a team from the tenant routing domain and region, such as `0c9188db.M365x397752.onmicrosoft.com@amer.teams.ms`. The first eight characters uniquely identify the team and channel, then the tenant name that was created when the tenant was first set up, then the @ sign, then the regional teams domain. In the earlier case, the tenant name is `M365x397752.onmicrosoft.com` and it was created in the North American (amer) region. Once you add and verify a custom domain in your tenant and set its purpose for email, email addresses will be user-friendlier and assigned in the default SMTP domain. You can assign a different SMTP address if you prefer.

To manage email integration at the organizational level, do the following:

1. Log on to the TAC at <https://admin.teams.microsoft.com>.
2. In the left menu, expand **Org-wide settings**, then select **Teams settings**.
3. Scroll down to **Email integration**.
4. You can turn off email integration by setting **Allow users to send emails to channel email address** to **Off**, or you can restrict what SMTP domains can send email to teams, as shown in Figure 2-7.



**FIGURE 2-7** The Org-wide settings for email integration

5. When you are done making changes, scroll down to the bottom of the Teams settings panel and select **Save**.

To change the address of a team, do the following:

1. As an Exchange admin or recipient admin, log on to the Exchange admin center at <https://admin.exchange.microsoft.com>.
2. Expand **Recipients** and then select **Groups**.
3. Find the Office 365 Group that corresponds to the team you wish to update.
4. Select the group.
5. Details of the group will be shown in a pop-up window. In the Email addresses section, select **Edit**.
6. You can edit the primary email address, or add one or more aliases and then set an alias as the primary, as shown in Figure 2-8.

← Back **Edit email addresses** ✕

Everyone in this group will receive email sent to the primary email address. Create aliases to give the group alternate email addresses. Any email sent to an alias will be forwarded to the primary email address.

**Primary email address**

ProjectXanadu@fourth.coffee 

**Aliases**

@ fourth.coffee  **Add**

xanadu@fourth.coffee ...

ProjectXanadu@M365x397752.onmicrosoft.com ...

**Save changes**

**FIGURE 2-8** Editing the email address for an Office 365 Group

7. When done, select **Save changes**.

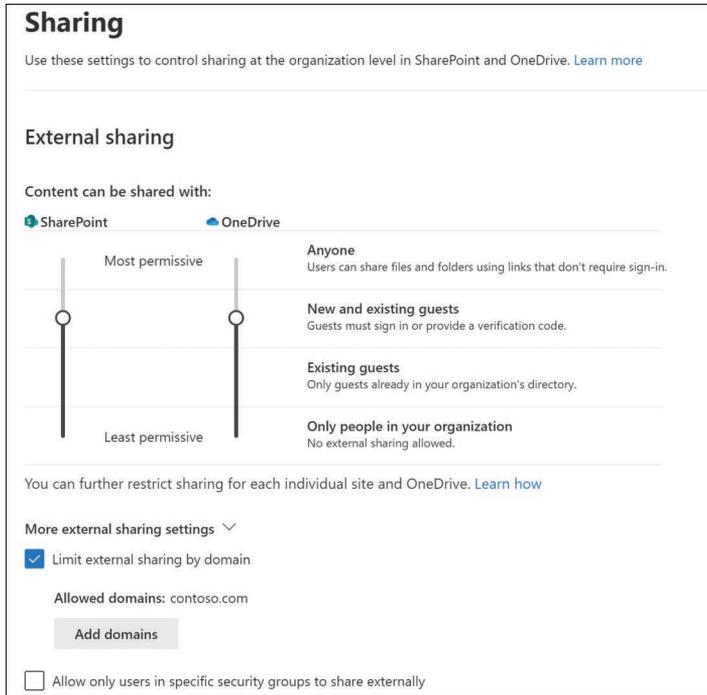
# Configure external access for SharePoint and OneDrive for Business

As you know by now, Microsoft Teams is heavily dependent on SharePoint and OneDrive for Business. Each team has an associated SharePoint site. Each public channel within a team has an associated folder. Ad hoc sharing uses OneDrive for Business. Both fall under compliance and retention policies set at the organizational level to facilitate administration.

As teams may have external guest members, how SharePoint and OneDrive for Business are configured for external access can have a direct impact on using Teams with external guests. Microsoft Teams uses the settings from SharePoint and OneDrive for Business that control sharing of files, including the defaults when sharing. If a team wants to include external users, but the SharePoint admin has blocked external sharing, the more restrictive setting will take precedence and could lead to unexpected results for the team owner. It's recommended that you use a more open approach to sharing within SharePoint and then implement more restrictive settings on sites that specifically hold more sensitive information, and the Microsoft Teams admin(s) and the SharePoint admin(s) work together to ensure that all settings deployed support the business need and meet specific company policies.

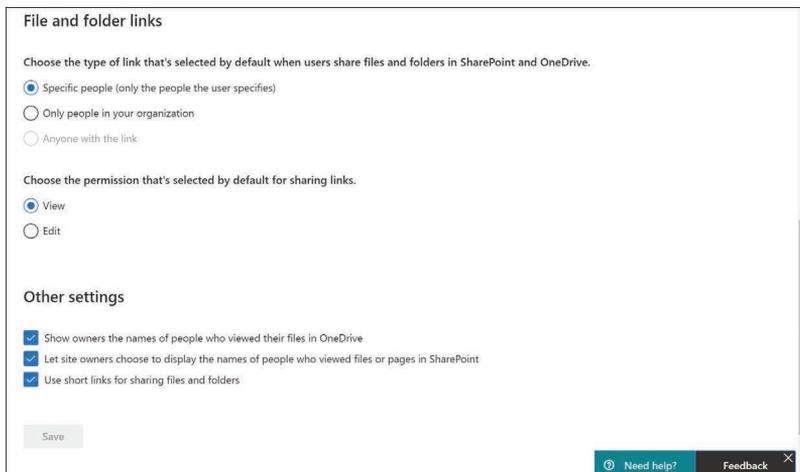
To set Sharing permissions at the organizational level, which will then apply to teams, do the following:

1. Log on to the SharePoint admin center at <https://tenantname-admin.sharepoint.com>.
2. In the left menu, expand **Policies** and select **Sharing**.
3. In the **External sharing** section, select the **More external sharing settings** link to see all the options, and then set the level of permissions that meets the organization's broadest requirements. It is also possible, through the Active Sites page in the SharePoint admin center, as well as through PowerShell, to set more granular options for external sharing at the site level. An example of this would be to allow external sharing for team sites for collaboration while blocking the ability to share content from a corporate intranet site. Note that you can also restrict sharing to only specific domains, such as partner domains, if desired, and this can also be configured granularly. Figure 2-9 shows the options for this.



**FIGURE 2-9** External sharing settings for SharePoint and OneDrive for Business

- Depending on the desired sharing posture for your organization, you can set default settings for sharing file and folder links, as shown in Figure 2-10. Note that these settings can be changed by the user up to the most permissive external sharing settings applied as previously discussed.



**FIGURE 2-10** Editing the default file and folder link settings

- When you are finished making changes, select **Save**.

# Index

## A

- AAD (Azure Active Directory)
  - external collaboration settings, 32
  - Microsoft 365 groups, policy configuration, 25–29
- AAD PowerShell, Microsoft 365 groups, policy configuration, 25–29
- AADConnect (Active Directory Connect), SfB upgrades, 7
- access
  - Azure AD access
    - configuring for guests, 44
    - managing for guests, 40–43
  - external access (federation), managing, 81–83
  - guest access, configuring, 31
  - Network Planner, 16
  - reviews, managing for team members, 148–151
- accounts, resource, 111–113
- administration
  - Global Administrators and Teams Administrators, 46
  - role assignments, 45–46
  - Teams Administrators
    - Global Administrators and, 46
    - roles, 46
- alerts, compliance/security, 53
- analyzing
  - call quality
    - Call Analytics, 63–65
    - CQD, 63–65
    - Power BI, 67–68
  - service usage, 60–61
    - Microsoft 365 usage reports, 62–63
    - Microsoft Teams usage reports, 61–62

- apps (applications)
  - app store, customizing, 155
  - meetings, setting preferences, 8–9
  - org-wide apps, managing settings, 151–152
  - policies, 151–152
    - permission policies, 153–154
    - setup policies, 154–155
- archiving/unarchiving teams, 27–28
- assessing
  - Microsoft Teams rollouts, 10–12
  - network readiness, 17–19
- assigning
  - admin roles, 45–46
  - user phone numbers, 106–108
- audio-conferencing, 108–109
- authentication, guest users, 45
- auto attendants, 116–119
- Azure AD, guest access
  - configuring, 44
  - managing, 40–43

## B

- bandwidth capacities, calculating, 16–17
- best practices, SDN, 23
- bridges, conference, 97–98

## C

- calculating bandwidth capacities, 16–17
- Call Analytics, call quality, 63–65
- call park policies, 119

## call quality

- call quality
  - Call Analytics, 63–65
  - CQD, 63–65
  - Power BI, 63–65
- call queues, 113–116
- caller ID policies, 120–121
- Calling Plans, 100
- calling policies, 119–120
- changing user phone numbers, 106–108
- channels, Microsoft Teams
  - managing, 84–85
  - private channels, 86–87
- chat experiences, 77
  - channels (Microsoft Teams)
    - managing, 84–85
    - private channels, 86–87
  - email integration, 87–88
  - external access (federation), 81–83
  - external sharing, SharePoint/OneDrive for Business, 89–90
  - messaging policies, 78–81
- cloud files, storage options for collaboration, 91
- Coexistence modes, 2, 5
  - configuring
    - for organizations, 2
    - per-user, 10
  - controlling, 3
  - Islands (Default), 3, 5
  - setting with
    - PowerShell, 4
    - TAC, 3–4
  - SfBOnly, 2
  - SfBWithTeamsCollab, 2
  - SfBWithTeamsCollabAndMeetings, 3
  - Teams Only Coexistence mode, 3
  - types of (overview), 2–3
  - users with multiple Coexistence modes, 5
- collaboration experiences, 77
  - channels (Microsoft Teams)
    - managing, 84–85
    - private channels, 86–87
  - cloud files, 91
  - email, integration, 87–88
  - external access (federation), 81–83
  - external sharing, SharePoint/OneDrive for Business, 89–90
  - messaging policies, 78–81
- collaboration settings, AAD, 32
- compliance/security
  - alerts, 53
  - creating features, 47–50
  - DLP policies, 51–52
  - information barrier policies, 53–54
  - retention policies, 47–48
  - sensitivity labels, 48–51
- conference bridges, 97–98
- configuration profiles, 56–57
- configuring
  - Azure AD access for guests, 44
  - Coexistence modes
    - organizations, 10
    - per-user, 10
  - conference bridges, 97–98
  - DSCP settings, network configurations, 22
  - dynamic memberships, 145–147
  - guest users, 32
    - AAD, external collaboration settings, 32
    - access, 31
    - Azure AD access, 44
    - DNS requirements, 39
    - live experiences, 37–38
    - meetings, 37–38
    - messaging options, 38–39
    - Microsoft 365 group guest settings, 33
    - Microsoft Teams guest settings, 35–36
    - SharePoint organizational-level sharing settings, 34–35
    - team permissions, 36–37
  - live experiences
    - guest users, 37–38
    - settings, 96–97
  - media optimization, network configurations, 21–22
  - meetings
    - guest users, 37–38
    - settings, 92–93
  - messaging
    - guest user options, 38–39
    - policies, 78–81

- Microsoft 365 groups, policy configuration, 25–29
- MTR, 59–60
- networks, 12–13
  - bandwidth capacities, 12–13
  - building plans, 14–15
  - custom personas, 13–14
  - DSCP settings, 22
  - media optimization, 21–22
  - network readiness, 17–19
  - planning deployments, 13–16
  - ports, 19–21
  - projected impacts to Microsoft Teams, 16
  - protocols, 19–21
  - reports, creating, 15
  - reports, generating, 15–16
- policies
  - expiration policies, 27–28
  - Microsoft 365 groups, 25–29
  - naming policies, 28–29
- ports, network configurations, 19–21
- protocols, network configurations, 19–21
- SfBH, 7
- update policies, 31

connectivity

- PSTN, 99–100

network requirements, 19–21

CQD (Call Quality Dashboard), 65–66

customizing

- app store, 155
- personas, 13–14

## D

data privacy, 62

deploying

- endpoints, Microsoft Teams deployments, 55–56
- Microsoft Teams deployments, 55–56
- networks, 13, 15
  - building plans, 14–15
  - custom personas, 13–14
  - projected impacts to Microsoft Teams, 16
  - reports, generating, 15–16

- Teams Advisor, 11–12
- device tags, 57–58
- device updates, 58–59
- Direct Routing, Health Dashboard for, 121–123
- DLP (Data Loss Prevention) policies, 51–52
- DNS (Domain Name System) requirements, guest users, 39
- DSCP (Differentiated Services Code Point), recommended settings, 21–22
- duplicating, team templates, 25
- dynamic emergency policies, 109–110
- dynamic memberships, 145–147

## E

editing team templates, 25

email, integration, 87–88

emergency addresses, 105–106

emergency policies, dynamic, 109–110

endpoint management

- configuration profiles, 56–57
- device tags, 57–58
- device updates, 58–59
- firmware updates, 58–59
- Microsoft Teams deployments, 55–56
- MTR, 59–60

existing resources, upgrading to teams, 135–138

expiration policies, 27–28

external access (federation), managing, 81–83

external sharing, SharePoint, 89–90

## F

federation (access), external, 81–83

firmware updates, 58–59

## G

generating network reports, 15–16

Global Administrators, Teams Administrators and, 46

governance/life-cycle management, 23

## **governance/life-cycle management**

- guest users, 32
  - access, 31
  - AAD external collaboration settings, 32
  - Microsoft 365 group guest settings, 33
  - Microsoft Teams guest settings, 35–36
  - SharePoint organizational-level sharing settings, 34–35
- Microsoft 365 groups
  - archiving/unarchiving teams, 27–28
  - expiration policies, 27–28
  - guest settings, 33
  - naming policies, 28–29
  - policy configuration, 25–29
  - undeleting groups, 30–31
- team templates, 23–25
- update policies, 31
- groups, Microsoft 365
  - archiving/unarchiving teams, 27–28
  - exceptions, 26
  - expiration policies, 27–28
  - licensing requirements, 26
  - naming policies, 28–29
  - policy configuration, 25–29
  - undeleting, 30–31
- guest
  - guest settings,
  - guest users, 143
    - access, configuring, 31
    - authentication, 45
    - Azure AD access
      - configuring, 44
      - managing, 40–43
    - configuring, 32
      - AAD, external collaboration settings, 32
      - Microsoft 365 group guest settings, 33
      - Microsoft Teams guest settings, 35–36
    - DNS requirements, 39
    - live experiences, configuring, 37–38
    - meetings, configuring, 37–38
    - messaging options, configuring, 38–39
    - Microsoft 365 groups, 33
    - removing, 40
    - team permissions, 36–37

## **H**

Health Dashboard for Direct Routing, 121–123

## **I**

- identifying Microsoft Teams rollouts, 10–12
- impacts (projected) to Microsoft Teams, network deployments, 16
- information barrier policies, creating, 53–54
- integrating email, 87–88
- Islands (Default) Coexistence mode, 3, 5

## **L**

- licensing
  - Microsoft 365 groups requirements, 26
  - sensitivity labels, 50
- life-cycle management/governance, 23
  - guest
    - guest users, configuring, 32
      - AAD external collaboration settings, 32
      - access, 31
      - Microsoft 365 group guest settings, 33
      - Microsoft Teams guest settings, 35–36
      - SharePoint organizational-level sharing settings, 34–35
    - Microsoft 365 groups
      - archiving/unarchiving teams, 27–28
      - expiration policies, 27–28
      - guest settings, 33
      - naming policies, 28–29
      - policy configuration, 25–29
      - undeleting groups, 30–31
    - team templates, 23–25
    - update policies 31
  - live experiences
    - configuring
      - guest users, 37–38
      - settings, 96–97
    - policies, 97

## M

### managing

- access reviews, 148–151
- app store customization, 155
- audio-conferencing, 108–109
- Azure AD access review for guests, 40–43
- channels, Microsoft Teams, 84–85
- chat experiences, 77
  - channels (Microsoft Teams), 84–85
  - email, integration, 87–88
  - external access (federation), 81–83
  - external sharing, SharePoint/OneDrive for Business, 89–90
  - messaging policies, 78–81
  - private channels, 86–87
- collaboration experiences, 77
  - channels (Microsoft Teams), 84–85
  - cloud files, 91
  - email, integration, 87–88
  - external access (federation), 81–83
  - external sharing, SharePoint/OneDrive for Business, 89–90
  - messaging policies, 78–81
  - private channels, 86–87
- device tags, 57–58
- device updates, 58–59
- email, integration, 87–88
- endpoints
  - configuration profiles, 56–57
  - device tags, 57–58
  - device updates, 58–59
  - firmware updates, 58–59
  - Microsoft Teams deployments, 55–56
  - MTR, 59–60
- external access (federation), 81–83
- firmware updates, 58–59
- life-cycle management/governance, 23
- meeting experiences, 91
  - conference bridges, 97–98
  - configuring, settings, 92–93
  - live experiences, configuring settings, 96–97
  - live experiences, policies, 97
  - Meeting policies, 94–96
- memberships in teams, 142
  - access reviews, 148–151
  - dynamic memberships, 145–147
  - team roles, 142–143
  - user management, 142–145
- org-wide apps, 151–152
- org-wide teams, 139–140
- phone systems, 111
  - auto attendants, 116–119
  - call park policies, 119
  - call queues, 113–116
  - caller ID policies, 120–121
  - calling policies, 119–120
  - Health Dashboard for Direct Routing, 121–123
  - resource accounts, 111–113
- privacy levels, teams, 138–139
- resource accounts, 111–113
- service numbers, 103–104
- team templates, 23–25
- update policies, 31
- users in teams, 142–145
- voice settings, 108–109
- media optimization, network configurations, 21–22
- meeting experiences, 91
  - conference bridges, 97–98
  - configuring settings, 92–93
  - guest users, configuring for, 37–38
  - live experiences
    - configuring settings, 96–97
    - policies, 97
  - Meeting policies, 94–96
  - migrations
    - app preferences, 8–9
    - planning, 8–9
    - troubleshooting, 8–9
- Meeting policies, 94–96
- memberships in teams, managing, 142
  - access reviews, 148–151
  - dynamic memberships, 145–147
  - team roles, 142–143
  - user management, 142–145
- messaging
  - guest user options, configuring, 38–39

## policies, configuring

policies, configuring, 78–81

Microsoft 365

group creation

archiving/unarchiving teams, 29–30

exceptions, 26

expiration policies, 27–28

guest settings, 33

licensing requirements, 26

naming policies, 28–29

policy configuration, 25–29

undeleting groups, 30–31

usage reports, 62–63

Microsoft Teams

admin roles, assigning, 45–46

channels, 84–87

Coexistence modes, 2–5

configuration profiles, 56–57

deployments, 55–56

device tags, 57–58

guest settings, 35–36

MTR, configuring, 59–60

network settings, configuring, 12–22

private channels, 86–87

rollouts, assessing/identifying with Teams

Advisor, 10–12

SfB migrations

Coexistence modes, configuring, 10

meetings, app preferences, 8–9

meetings, planning, 8–9

meetings, troubleshooting, 8–9

notifications, 8–9

upgrades, 5–7

usage reports, 61–62

migrating from SfB to Microsoft Teams,

Coexistence modes, 2, 5

configuring, 10

controlling, 3

Islands (Default), 3, 5

setting with PowerShell, 4

setting with TAC, 3–4

SfBOnly, 2

SfBWithTeamsCollab, 2

SfBWithTeamsCollabAndMeetings, 3

Teams Only Coexistence mode, 3

types of (overview), 2–3

users with multiple Coexistence modes, 5

meetings

app preferences, 8–9

planning, 8–9

troubleshooting, 8–9

notifications, 8–9

upgrades, 5–6

AADConnect, 7

paths (overview), 5–6

SfBH, 7

monitoring

call quality

Call Analytics, 63–65

CQD, 63–65

Power BI, 67–68

service usage, 60–61

Microsoft 365 usage reports, 62–63

Microsoft Teams usage reports, 61–62

MTR (Microsoft Teams Rooms), configuring, 59–60

## N

naming policies, 28–29

Network Planner

accessing, 16

Microsoft Team deployments, 13–14

projected impacts, determining, 16

reports

creating, 15

generating, 15–16

networks

bandwidth capacities, 12–13

building plans, 14–15

configuring, 12–13

connectivity requirements, 19–21

custom personas, 13–14

DSCP settings, 22

media optimization, 21–22

network readiness, 17–19

planning deployments, 13–16

ports, 19–21

projected impacts to Microsoft Teams, 16

protocols, 19–21

readiness, assessing, 17–19

- reports
  - creating, 15
  - generating, 15–16
- notifications, migrating from Skype for Business (SfB) to Microsoft Teams, 8–9

## O

- OneDrive for Business, external sharing, 89–90
- Open Federation, SfBH, 7
- optimizing
  - call quality, 63–65, 67–68
    - Call Analytics, 63–65
  - media in network configurations, 21–22
- ordering phone numbers, 101–102
- organizational-level sharing settings, SharePoint, 34–35
- organizations, Coexistence modes, 10
- org-wide apps, managing settings, 151–152
- org-wide teams, managing, 139–140

## P

- permissions
  - policies, apps, 153–154
  - team permissions, guest user configurations, 36–37
- personas, custom, 13–14
- phone numbers, 99
  - audio-conferencing, 108–109
  - dynamic emergency policies, 109–110
  - emergency addresses, 105–106
  - ordering, 101–102
  - PSTN, connectivity solutions, 99–100
  - service numbers, 103–104
  - user numbers, 106–108
  - voice settings, 108–109
- phone systems, 111
  - auto attendants, 116–119
  - call park policies, 119
  - call queues, 113–116
  - caller ID policies, 120–121
  - calling policies, 119–120

- Health Dashboard for Direct Routing, 121–123
- resource accounts, 111–113
- planning
  - meetings, migrations and, 8–9
  - network deployments, 13
    - building plans, 14–15
    - custom personas, 13–14
    - projected impacts to Microsoft Teams, 16
    - reports, creating, 15
    - reports, generating, 15–16
- policies
  - apps (applications), 151–152
  - call park policies, 119
  - caller ID policies, 120–121
  - calling policies, 119–120
  - DLP policies, 51–52
  - dynamic emergency policies, 109–110
  - expiration policies, 27–28
  - information barrier policies, 53–54
  - live experiences, 97
  - Meeting policies, 94–96
  - messaging policies, 78–81
  - Microsoft 365 groups
    - archiving/unarchiving teams, 27–28
    - configuring, 25–29
    - expiration policies, 27–28
    - naming policies, 28–29
  - naming policies, 28–29
  - packages, teams, 140–142
  - permission policies, apps, 153–154
  - retention policies, 47–48
  - setup policies, apps, 154–155
  - update policies, configuring/managing, 31
- ports, network configurations, 19–21
- Power BI, 67–68
- PowerShell, Coexistence modes, setting, 4
- privacy
  - data, 62
  - levels of, teams, 138–139
  - private channels, Microsoft Teams, 86–87
- profiles, configuration, 56–57
- projected impacts to Microsoft Teams, network deployments, 16
- protocols, network configurations, 19–21

## PSTN (Public Switched Telephone Networks), connectivity solutions

PSTN (Public Switched Telephone Networks), connectivity solutions, 99–100

## Q

quality of calls

Call Analytics, 63–65

CQD, 63–65

Power BI, 63–65

Quality of Service (QoS), 22

DSCP settings, recommended, 22

media optimization, network configurations, 21–22

queues, call, 113–116

## R

readiness of networks, assessing, 17–19

recommended DSCP settings, 21–22

removing

guest users, 40

user phone numbers, 106–108

reports

network deployments

creating reports, 15

generating reports, 15–16

usage reports

Microsoft 365, 62–63

Microsoft Teams, 61–62

resource accounts, managing, 111–113

resources (existing), upgrading to teams, 135–138

retention policies, 47–48

reviewing team member access, 148–151

rooms, MTR management, 59–60

routing, Health Dashboard for Direct Routing, 121–123

## S

SDN, best practices, 23

security

admin roles, assigning, 45–46

alerts, creating, 53

DLP policies, 51–52

information barrier policies, creating, 53–54

sensitivity labels, 48–51

sensitivity labels, 48–51

service numbers, managing, 103–104

service usage, monitoring/analyzing, 60–61

call quality

Call Analytics, 63–65

CQD, 63–65

Power BI, 67–68

usage reports

Microsoft 365, 62–63

Microsoft Teams, 61–62

setting up. *See* configuring

setup policies, apps, 154–155

SfB (Skype for Business), Microsoft Teams

migration

Coexistence modes, 2–5, 10

meetings

app preferences, 8–9

planning, 8–9

troubleshooting, 8–9

notifications, 8–9

upgrades, 5–7

SfBH (Skype for Business Hybrid), 7

SfBO (Skype for Business Online), end-of-life, 1, 8

SfBOnly Coexistence mode, 2

SfBWithTeamsCollab Coexistence mode, 2

SfBWithTeamsCollabAndMeetings Coexistence mode, 3

SharePoint

external sharing, 89–90

organizational-level sharing settings, 34–35

sharing (external), SharePoint/OneDrive for Business, 89–90

storage, cloud files, 91

## T

TAC (Teams Admin Center)

Coexistence modes, setting, 3–4

device updates, 58–59

firmware updates, 58–59

- update policies, configuring/managing, 31
- tags, device, 57–58
- team templates
  - creating/managing, 23–25
  - duplicating, 25
  - editing, 25
- teams
  - app policies, 151
    - org-wide apps, 151–152
    - permission policies, 153–154
    - setup policies, 154–155
  - app store, customizing, 155
  - creating, 129–135
  - existing resources, upgrading, 135–138
  - memberships, managing, 142
    - access reviews, 148–151
    - dynamic memberships, 145–147
    - team roles, 142–143
    - user management, 142–145
  - org-wide apps, managing settings, 151–152
  - org-wide teams, managing, 139–140
  - policy packages, 140–142
  - privacy levels, 138–139
- Teams Administrators
  - Global Administrators and, 46
  - roles, 46
- Teams Advisor
  - deploying, 11–12
  - Microsoft Teams rollouts, assessing/identifying, 10–12
- Teams Only Coexistence mode, 3
- TeamsUpgradePolicy, Coexistence modes, 3
- templates, team
  - creating/managing, 23–25
  - duplicating, 25
  - editing, 25
- troubleshooting meetings, 8–9

## U

- unarchiving/archiving teams, 27–28
- undeleting groups, 30–31
- updates
  - device updates, 58–59
  - firmware, 58–59
- upgrading
  - existing resources to teams, 135–138
  - to Microsoft Teams, 5–6
    - AADConnect, 7
    - paths (overview), 6
    - SfBH, 7
- usage reports
  - Microsoft 365, 62–63
  - Microsoft Teams, 61–62
- users
  - Coexistence modes, configuring, 10
  - guest users, 143
    - AAD external collaboration settings, 32
    - authentication, 45
    - Azure AD access, 40–44
    - configuring, 32
    - live experiences, 37–38
    - meetings, 37–38
    - messaging options, 38–39
    - Microsoft 365 group guest settings, 33
    - Microsoft Teams guest settings, 35–36
    - removing, 40
      - team permissions, 36–37
    - managing in teams, 142–145
    - phone numbers, 106–108

## V - Z

- voice settings, managing, 108–109

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