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Dedications

I’d like to dedicate this book to my kids, several of whom reminded me that I didn’t include their names in my last book. Sorry for the oversight. I also want to thank my co-authors, without whom I would have had to write a lot more.

—Aaron Guilmette

I’d like to dedicate this book to my family for their support and understanding, and I’d like to thank my co-authors, a motley crew, for their willingness to collaborate. This book has been a labor of love, and I sincerely hope it can help others to learn and grow.

—Darryl Kegg

I dedicate this book to Connie, without whom this could not have happened and would not have mattered. Thanks for being my better half in every way. And to my partners in crime on this book: It’s always a pleasure, gentlemen! And thank you to the great team at Pearson and The Wordsmithery for all your help and patience!

—Ed Fisher
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Microsoft’s online offerings have continued to evolve since the first debut of the Live@Edu service in 2005. Four years later, in April 2009, Microsoft expanded its cloud services offering with the launch of Microsoft Business Productivity Online Services. Over the last 18 years, Microsoft has steadily rolled out new features to the service and paved the way for today’s modern Microsoft 365 platform.

Microsoft 365 enables organizations as small as a single person or as large as the world’s biggest multinational retailers and manufacturers to harness the power of cloud scaling, automation, and availability. Microsoft’s online services currently enable over 200 million monthly active users to collaborate—whether they’re in the same room, across the hall, or around the world.

The service is evergreen—built around the ideas of continuous improvement and feature release—to ensure that customers always receive the latest capabilities and enhance their ability to be more agile, productive, and secure. With the launch of the Microsoft 365 product suite in 2017, Microsoft added Windows platform, mobility, and enterprise security capability to the already popular Office 365 software-as-a-service offering.

Microsoft has a vision for a cloud-first, mobile-first future—built on the broad capabilities of Microsoft 365 and Azure. This book equips you with the knowledge you need to tackle the deployment of one of the largest transformational products available as well as insider tips that help you avoid the mistakes that might slow you down.

Who this book is for

This book is written for IT professionals responsible for deploying, migrating to, and managing some (or all) of an organization’s Microsoft 365 environment. Microsoft 365 isn’t just a single application or service; it’s a suite of software-as-a-service tools that can touch every part of the business.

For some, Microsoft 365 might seem like just one more thing to learn. In reality, though, if you’ve been administering on-premises versions of Active Directory, Exchange, or SharePoint, you’re already familiar with many of the core concepts you need to hit the ground running. The Microsoft 365 platform enables myriad hybrid capabilities, allowing your organization to adopt the cloud on its terms and timeline. There are a lot of compelling cloud-only features that you’ll want to explore as well.

We at Microsoft believe that the Microsoft 365 platform is an extension of your own datacenter. The management patterns and practices you’ve built for your on-premises environment can be updated and adapted to the cloud, enabling you to achieve quicker results.
We’ve organized this book to try to take you from the very beginning through progressively more advanced concepts. However, you don’t have to read it in order—you can skip around to the parts that address your most immediate needs. Our goal with this book is to help you at any stage of your cloud journey—whether you’re a consultant looking for architecture and planning guidance or an IT pro tasked with deployment and management.

**Conventions**

This book uses special text and design conventions to make it easier for you to find the information you need.

**Text conventions**

The following conventions are used in this book:

- **Boldface type** is used to indicate text that you should type where directed.

- For your convenience, this book uses abbreviated menu commands. For example, “Click Tools > Track Changes > Highlight Changes” means you should click the Tools menu, point to Track Changes, and then click the Highlight Changes command.

- Elements with the Code typeface are meant to be entered on a command line or inside a dialog box. For example, “type cd \Windows to change to the Windows subdirectory” means that you should be entering `cd \windows` with your keyboard or text input device.

- The first letters of the names of menus, dialog boxes, dialog box elements, and commands are capitalized—for example, the Save As dialog box.

- **Italicized type** indicates new terms.

**Book features**

In addition to the text conventions, this book contains sidebars to provide additional context, tips, or suggestions.
Inside OUT

These are the book’s signature tips. In these tips, you’ll get the straight scoop on what’s going on with the software or service—inside information about why a feature works the way it does. You’ll also find field-tested advice and guidance as well as details that give you the edge on deploying and managing like a pro.

READER AIDS

Reader aids are exactly that—Notes, Tips, and Cautions provide additional information on completing a task or specific items to watch out for.

Acknowledgments

We would like to thank the teams at Pearson and Microsoft Press for giving us the opportunity to share our knowledge, experiences, and lessons learned in this update. We’d also like to thank our coworkers and peers for content ideas, suggestions, and feedback during the writing and revising process. And, of course, we want to thank the countless engineers, programmers, and technical experts who tirelessly work behind the scenes to expand the capabilities of the platform, giving all of us the ability to achieve more.

Errata, updates, & book support

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:

MicrosoftPressStore.com/365AdminInsideOut/errata

If you discover an error that is not already listed, please submit it to us at the same page.

For additional book support and information, please visit MicrosoftPressStore.com/Support.

Please note that product support for Microsoft software and hardware is not offered through the previous addresses. For help with Microsoft software or hardware, go to:

Stay in touch

Let's keep the conversation going! We're on Twitter: twitter.com/MicrosoftPress.
In the previous chapter, we identified some high-level tasks involved in a Microsoft 365 deployment. In this chapter, we will use your understanding of those tasks to

- Continue setting up your Microsoft 365 subscription
- Assign administrators
- Configure your network
- Run the IDFix tool to clean up your directory
- Update and install client software
- Start synchronizing your users to your tenant

Once these tasks are complete, you will be able to start using your Microsoft 365 subscription and migrating your users.

**Setting up your subscription**

If you have not already set up your Microsoft 365 subscription, that is the best place to start. Please review the steps in the previous chapter to select and begin a subscription. As discussed, the tenant name you select will become permanent and branded across your subscription, so choose carefully.

**Finding your tenant name**

Once the tenant name selection is complete, each of the services within your Microsoft 365 subscription (such as Exchange, SharePoint, or Teams) will be branded with the name you selected. As mentioned previously, this branding process is permanent, and the name will be visible in several locations—the Microsoft 365 service, your users, and external parties.
Exchange Online

Exchange Online uses your tenant name in the routing email address stamped on every mail-enabled object you create.

The Exchange Hybrid process (discussed in more detail in Chapter 15, “Exchange Online hybrid planning and deployment”) configures a recipient policy in your Exchange on-premises organization that automatically assigns an email address suffix of @tenantName.mail.onmicrosoft.com for every mail-enabled object. This @tenant.mail.onmicrosoft.com address is typically referred to as the service routing address.

This service routing address is required for every mailbox that will be migrated to Exchange Online. It will not appear on cloud-only mailboxes because it is applied in an on-premises environment. However, within the Exchange Online service, there is another automatic email address assignment that is not optional and cannot be changed.

As seen in Figure 2-1, Exchange Online automatically assigns an email address ending in @tenantName.onmicrosoft.com to every mail-enabled object.

![Figure 2-1](image)

The email address seen in the example above is only visible to your internal users when viewing the contact properties of another mail-enabled object. It is also important to note that this address does NOT contain the word mail, like in the service routing address mentioned above.

This additional onmicrosoft.com routing address is not visible outside your organization, nor is it present in the email header when sending messages to external recipients over the Internet.
TIP

The domain suffix mail.onmicrosoft.com is not added automatically to the tenant during the Exchange Online setup; instead, this domain suffix is added to every mail-enabled object in on-premises Exchange via an email address policy added during the Exchange Hybrid setup.

SharePoint Online

Of all the services in Microsoft 365, your tenant name appears most prominently in SharePoint Online. It is visible internally in site content URLs and in the shared URLs provided to external parties.

As shown in Figure 2-2, the tenant name is present in the URL for every external sharing request sent via email.

OneDrive for Business

Because OneDrive is part of the SharePoint Online service and takes the place of MySites in SharePoint Server, your tenant name will appear in any OneDrive URLs shared via email to internal or external recipients. Additionally, when OneDrive content is viewed when navigating between folders or stored files, it will display the tenant name in the URL (visible in the address bar at the top of the browser). See Figure 2-3.
Microsoft Teams

In past versions, the tenant name in Microsoft Teams was visible when viewing the meeting URL in meeting requests sent via email. However, it no longer contains references to your tenant name.

The meeting URL can be viewed by right-clicking or hovering over the Join Teams Meeting hyperlink in email invites, as shown in Figure 2-4.

Microsoft 365 Apps

The tenant name is not visible when viewing the properties of the Microsoft 365 Apps (formerly Microsoft Office 365 ProPlus) applications, nor is it visible in any of the additional licensed Office-suite applications like Visio or Project.
Office Online

Office Online applications automatically use OneDrive for Business as the default save location for newly created documents, as shown in Figure 2-5. This is visible to your user in the browser address bar, and if these documents are shared with external parties, the file’s URL will contain the tenant name.

![Figure 2-5 Tenant name visibility when using Office Online applications](image)

Assigning administrators

Using the information you learned in Chapter 1, you can either create cloud accounts and delegate administrative privileges or wait until you’ve started synchronizing your users (discussed later in this chapter) and assigning permissions.

In either case, you might need to delegate permissions to one or more additional administrators. Keep in mind that the Global Administrator role has the right to create other Global Administrators, so you should limit administrative delegation to one of the other administrative roles discussed in Chapter 1 and avoid creating other Global Administrator accounts unless necessary.

Follow the steps below to create a new administrative account with User administration privileges:

2. Select Add A User from the Home or Users views, as shown in Figure 2-6.

![Figure 2-6 The Active Users view in the Microsoft 365 admin center](image)
3. Enter the necessary First Name, Last Name, Display Name, and User Name in the boxes provided, as shown in Figure 2-7.

![Figure 2-7 Creating a cloud user with administrative privilege](image)

4. When creating the account, select the Roles dropdown under Optional Settings, select Admin Center Access, and check the User Administrator box, as shown in Figure 2-8.

![Figure 2-8 Selecting an administrator role for a Microsoft 365 user account](image)

5. Click Add to create the cloud user account.
6. This process can be used to modify existing cloud accounts or even accounts that have been synchronized from on-premises Active Directory using the AAD Connect synchronization tool.

7. Once you have completed the creation of any administrator accounts in your new tenant, you can move on to creating DNS records to verify your domains, as well as any other services that you wish to add.

Configuring DNS, firewalls, and proxy servers

As discussed in Chapter 1, several network devices could affect your Microsoft 365 deployment, connectivity, and continued success with the services provided. Therefore, it is strongly recommended that all network devices be updated to their latest versions, and each device vendor should be contacted to ensure that your device supports Microsoft 365 connectivity.

Often, it is merely a matter of upgrading your existing devices to support Microsoft 365. However, this upgrade process can be time-consuming and disruptive if not done correctly. Therefore, it is strongly recommended that any infrastructure changes required to support Microsoft 365 be made before starting your Microsoft 365 deployment.

Public DNS records

The first necessary configuration changes will be to your public DNS records, which will allow you to verify any domain names and configure the necessary DNS records for things like mail exchange (MX), Exchange AutoDiscover, and Teams.

Proof of domain ownership

When setting up your domain name, as discussed in Chapter 1, the Microsoft 365 admin center configuration steps will walk you through making the necessary DNS changes with your registrar to provide domain ownership proof, typically in the form of a TXT record.

This TXT record can be removed once ownership is verified, and in many cases, the admin center configuration will automatically connect to your registrar and make the necessary addition if you provide credentials.

The network changes will need to be made manually by an authorized administrator if your public DNS infrastructure is managed internally or hosted on Microsoft Windows Server via the Domain Name Services role or another network appliance.

MX, SRV, and other DNS records

Once you have completed the setup process described previously using the Microsoft 365 admin center, your domain will automatically be registered in Microsoft 365, and it can be used as the domain suffix for the UserPrincipalName for the user login and Exchange Online mail
routing. This is because the automated configuration process will add MX records to your DNS configuration, allowing email to be delivered to Microsoft 365 automatically.

Additionally, the Exchange AutoDiscover, Sender Policy Framework (SPF), and required Server Resource (SRV) records will exist in Microsoft 365 tenant’s initial domain namespace (tenant.onmicrosoft.com). These will allow Outlook and mobile client connectivity to your tenant and Teams client. Also, they will allow you to send and receive email directly to or from your tenant or communicate using Instant Message (IM) and Voice Over IP (VOIP) communications via Teams.

**TIP**

If your existing domain name (cohovineyards.us in this chapter’s examples) is already configured with MX, SIP, SMTP, CNAME, or SPF records in your public DNS and routing to your on-premises infrastructure, you will want to select the manual configuration options in the previous configuration process and make only the necessary changes to support your Microsoft 365 setup.

**NOTE**

Additional configuration changes for Exchange mail routing as part of the Exchange or Teams hybrid processes are covered in later chapters and can be performed later so as not to impact existing functionality.

**Firewall configurations**

Microsoft 365 is a cloud-based solution, so it is a requirement that your internal infrastructure can communicate with your tenant without any connectivity issues introduced by your networking infrastructure.

If your internal infrastructure cannot communicate with Azure, your Microsoft 365 experience will be impacted—possibly resulting in email delays. Also, this can prevent you from authenticating and using services or provisioning or licensing users. It can even prevent access to cloud data.

It is strongly recommended that all network devices responsible for packet filtering, load balancing, and network port access control be configured to allow unrestricted outbound traffic to the Microsoft datacenters.

The Microsoft datacenter IP ranges include all the Microsoft 365 services and are maintained on the Microsoft 365 support site. The IP ranges can be viewed and downloaded here: [https://aka.ms/M365_IPs](https://aka.ms/M365_IPs)
Proxy servers

Traditionally, proxy servers are used to relay requests to the Internet via a single host, though this behavior can create issues when setting up certain services for Microsoft 365 connectivity.

Primarily, traffic to Microsoft 365 is outbound traffic. Some services, like Exchange AutoDiscover, AD FS authentication, and mail routing, might be an exception; however, it is important to understand that proxy server configurations can cause interruptions.

Many proxy servers or services rely on some form of user authentication (either explicit or implicit) to allow the infrastructure to track users and filter requests according to business requirements. This proxy authentication feature primarily impacts directory synchronization.

The directory synchronization process, performed by the AAD Connect tool, connects to Microsoft 365 every 30 minutes to synchronize any directory updates. Additionally, depending on the AAD Connect tool’s configuration, it will retrieve password changes and other data. If the connectivity between AAD Connect and Microsoft 365 is affected, the synchronization might fail, resulting in incomplete data in Microsoft 365.

Therefore, we recommend the AAD Connect tool be exempted from any proxy server configurations and allowed to communicate with Azure without any proxy configuration.

**CAUTION**

The AAD Connect tool does not support authenticated proxy servers. Instead, you must bypass any authenticated proxy servers, or you will be unable to synchronize your directories with Microsoft 365.

If you cannot bypass proxy servers for the AAD Connect implementation, we recommend configuring both Internet Explorer and the shell to use the same proxy server. Both methods are used during the AAD Connect setup for communication with Microsoft 365, so failure to enable both might result in a failed installation.

To set up Internet Explorer on the server where the synchronization tool will be installed, you will need to do the following:

1. Launch Internet Explorer.
2. Select Tools and Internet Options from the Internet Explorer main menu.
3. Select Connections > LAN Settings from the Internet Options menu.
4. Make sure the Proxy Server box is checked and a proxy server and port are provided in the Address and Port fields, as shown in Figure 2-9.
Chapter 2  Preparing your environment for the cloud

5. Click OK to close the Local Area Network (LAN) Settings dialog box and OK again to close the Connections dialog box.

Once the proxy server has been properly configured in Internet Explorer, perform the following steps to configure the proxy server for the Windows Shell:

1. Open an administrative command prompt by clicking Start, Run (or Win+R), typing CMD.EXE, and pressing Enter.
2. Enter the `netsh winhttp show proxy` command and press Enter.
3. If the command returns the `Direct access (no proxy server)` result, as shown in Figure 2-10, proceed to the next step to configure the proxy server.

![Figure 2-9  Configuring Internet Explorer proxy server](image)

![Figure 2-10  Displaying current WinHTTP proxy server configuration](image)
4. Enter the `Netsh WinHTTP Import proxy Source=IE` command and press Enter.

5. If the command completes successfully, it should display the same proxy server that is configured in Internet Explorer, as seen in Figure 2-11.

![Figure 2-11 Configuring Netsh proxy using Internet Explorer](image)

6. Finally, in some circumstances, it might also be necessary to modify the `machine.config` file used by the Windows .Net configuration to also define the proxy server that should be used by any .Net applications.

If the AAD Connect setup fails to properly communicate with Azure—even after the settings in Internet Explorer and the Windows Shell have been configured—the .Net configuration file can be modified via the following steps:

1. On the AAD Connect server, navigate to `C:\Windows\Microsoft.Net\Framework64\v4.xxxxxxxx\Config`, where `x4.xxxxx` is the v4.0 or v4.5 directory located under the Framework64 folder. This directory name will depend upon the .Net 4 version installed on your AAD Connect server.

2. Edit the `machine.config` file, shown in Figure 2-12, using Notepad.

![Figure 2-12 The Microsoft .Net machine.config file location](image)
3. At the bottom of the file, insert the following block of text before the </configuration> line, substituting <PROXYADDRESS> with the name or IP address of your proxy server and <PROXYPORT> with the correct port number:

```xml
<system.net>
  <defaultProxy enabled="true" useDefaultCredentials="true">
    <proxy
      usesystemdefault="true"
      proxyaddress="http://<PROXYADDRESS>:<PROXYPORT>"
      bypassonlocal="true"
    />
  </defaultProxy>
</system.net>
```

4. Save the updated file, as shown in Figure 2-13.

![Figure 2-13](image-url)

The machine.config file, updated to include default proxy information

5. Once the proxy server configurations have been made to Internet Explorer, the Windows Shell, and the .Net configuration, you may proceed with installing and configuring the AAD Connect tool for directory synchronization.

Network tracing

Occasionally, during the implementation or configuration of proxy server or network firewall changes, it might be necessary to review the communication between your application and Microsoft 365. Understanding the route that Microsoft 365 communication must take to reach Azure will help troubleshoot network connectivity issues.

Other than mailbox moves, the synchronization process is the most common reason for connectivity tracing with Microsoft 365. Unless configured differently, the AAD Connect sync engine
will connect to Azure every 30 minutes to synchronize directory changes from on-premises to the cloud.

Depending on the additional features selected during installation, the AAD Connect engine might connect as frequently as every 1 to 2 minutes to retrieve password change and other authentication requests from the Azure service bus.

If you need to review traffic between your AAD Connect server and Microsoft 365, you can use tools like NetMon3, Fiddler, or WireShark to capture network traces from the server to ensure no other devices are preventing proper communication.

In the example below, we are using Fiddler to capture and import from the Microsoft 365 tenant using the AAD Connect tool. Fiddler is installed on the AAD Connect server and has been configured to decrypt HTTPS traffic.

The trace was captured by using the following steps:

2. Launch Fiddler and press F12, or select File and choose Capture Traffic.
3. Start the AAD Connect Synchronization Service Manager.
4. Select Connectors.
5. In the Connections window, select the Windows Azure Active Directory connector.
6. In the Actions pane, select Run.
7. Choose Full Import and click OK, as shown in Figure 2-14.

![Figure 2-14](image-url) Starting a Full Import on the Azure Connector in AAD Connect
8. Once the Full Import has been completed, review the results of the Fiddler trace, as shown in Figure 2-15.

![Figure 2-15  Fiddler trace of the AAD Connect Full Import run step](image)

In the screen capture above, each line represents a packet in the communication between the AAD Connect server and Azure Active Directory. The packets are performing the following actions:

1. Communication is established between the synchronization engine and Azure via the login.windows.net URL over secure SSL port 443.

2. Home realm discovery is initiated using the SynC_COHOVINEYARD-DC_c8cd2f06f4ae@cohovineyard.onmicrosoft.com account. This account, discussed in detail in Chapter 4, is the account used to authenticate with Microsoft 365 for synchronization.

3. The home realm discovery process results in an authentication token with the cohovineyard.onmicrosoft.com tenant.

4. The synchronization engine is redirected to the adminwebservice.microsoftonline.com URL over secure SSL port 443.

5. The synchronization engine begins reading data from the adminwebservice.microsoftonline.com/provisioningservice.svc endpoint URL, which returns the tenant data to the sync engine.

6. The process continues until all the directory data has been read from the Microsoft 365 tenant into the Azure connector in the synchronization engine, at which point, communication ceases.

7. As you can see from the preceding example, despite the existence of a proxy server in the configuration, there was no effect on the traffic between the synchronization engine and the Microsoft 365 tenant. If there had been issues with the traffic, you would have experienced retransmissions or transmission failures like the example in Figure 2-16.
In the example shown in Figure 2-16, communication with Azure AD was initiated, and the sync account was authenticated properly. However, the transmission was interrupted, resulting in a retry operation, which failed and stopped the Import from Azure.

Tools like Fiddler and NetMon3 can be invaluable when you first set up the synchronization process because they ensure communication is working properly and none of your network devices are affecting performance or connectivity. Therefore, it is strongly recommended that you become familiar with the proper functionality of the synchronization process and any other service-related connectivity (such as mailbox moves and Office application activation) to ensure the best possible Microsoft 365 experience.

**CAUTION**

Network connectivity between the synchronization engine and Microsoft 365 is one of the most common troubleshooting areas, primarily related to proxy servers and any network devices that do packet inspection.

The synchronization engine connects in 30-minute intervals, and depending on the additional features, it can connect as frequently as every 2 minutes.

Make sure you understand the network path between the sync engine and Azure, eliminate devices if possible, and be familiar with traffic patterns and troubleshooting that communication.

**ExpressRoute**

ExpressRoute is a secure connection between your on-premises network and the Azure cloud. It provides managed connectivity to the Microsoft datacenters via a secure and private connection and eliminates the need to traverse the public Internet for your Microsoft 365–related traffic.

In addition to bypassing the public Internet for Microsoft 365 traffic, ExpressRoute provides a fast and reliable connection to Azure, making replication, high-availability, and data migration scenarios easier to implement.
Preparing your environment for the cloud

If you are considering ExpressRoute connectivity to the Microsoft cloud during your implementation of Microsoft 365, we strongly recommend implementation be done before the rest of your Microsoft 365 readiness milestones. An ExpressRoute implementation changes your network routing internally and affects things like load balancers, proxy servers, and firewalls. These changes will affect communication, so they should be made before establishing synchronization and starting mailbox migrations.

Preparing your directories

Much like preparing your network for a successful Microsoft 365 implementation, it is equally important to ensure that your on-premises directories are free from any issues that might impact a successful synchronization of users, groups, and contacts to your tenant.

Microsoft provides the IDFix tool, which will review your environment and highlight any problem areas or data inconsistencies. Follow these steps to install IDFix:

1. Download the IDFix setup media from https://aka.ms/idfix and launch it.
2. Launch the IDFix setup media and click Install, as shown in Figure 2-17.
3. If prompted with an Open File–Security Warning, as shown in Figure 2-18, click Run to proceed with the installation.

Inside Out

_Do I need ExpressRoute?_

Microsoft 365 services are designed to work best over the Internet because the multi-pathing characteristics of the Internet provide the best service routes and reliability. Microsoft does not recommend using ExpressRoute to connect to Office 365 or Microsoft 365 services. Purchasing ExpressRoute for Microsoft 365 requires Microsoft approval. For more information, see https://aka.ms/erguide.
Figure 2-17  Application Install Security Warning dialog

Figure 2-18  Open File Security Warning dialog
4. Click OK to proceed past the IdFix Privacy Statement dialog shown in Figure 2-19. This dialog is displayed because the IdFix application will review your data and provide reports containing sensitive information.

![IdFix Privacy Statement](image)

Figure 2-19 The IDFix Privacy Statement

5. Select the Query option from the topmost menu, as shown in Figure 2-20.

![IDFix tool main menu](image)

Figure 2-20 The IDFix tool main menu

6. While the query is running, a status will be displayed in the lower-left corner.

7. As shown in Figure 2-21, once the query has been completed, a list of all detected issues will be displayed with an error description for each. The total object and error counts will be displayed in the lower-left corner.
Figure 2-21  IDFix error report summary

8. Selecting a single error will allow you to use the Action column to define the behavior that should be used to resolve it. As shown in Figure 2-22, you can choose to Edit, Remove, or Complete the object in question.

Figure 2-22  Selecting actions for error objects in IDFix

9. Once you have selected the appropriate action for each object, selecting Apply at the top of the menu returns the confirmation dialog shown in Figure 2-23.
10. Click Yes to apply all selected updates.

11. Once complete, all updates that have been applied will be marked as Complete, as shown in Figure 2-24.

12. Following are a few important notes:

- When selecting Edit, you will not be allowed to edit the value in error manually. Instead, the IDFix tool will simply apply the update displayed in the Update column. You should review this new value below, allowing IDFix to make the change.
Optionally, you can use the Accept option on the IDFix main menu to automatically apply the updated value shown in the Update column to each object in an error state, as shown in Figure 2-25.

![Figure 2-25 The IDFix Accept option](image)

Like the Apply option, the Accept option will also display a dialog warning that the changes being made represent a risk as they are changing data in your directory. See Figure 2-26.

![Figure 2-26 Apply Pending dialog](image)

Using the Accept All option in the Accept dropdown menu will simply change all Action fields to Edit, and it is then necessary to use the Apply option to make the changes.

13. Once the changes have been applied, select Query to re-run the IDFix process against your directory and confirm no additional changes are required.

### Updating and deploying client software

Before migrating mailboxes to Microsoft 365, any machines with Microsoft Outlook installed must be updated to the latest public update (PU) so there is no interruption in the user experience after mailbox migrations have begun.

---

**Figure 2-25** The IDFix Accept option

**Figure 2-26** Apply Pending dialog
Even a mailbox that has not yet migrated to Exchange Online might experience connectivity issues or constant credential prompts if that mailbox is delegated permission to another mailbox that HAS been migrated to Microsoft 365. For this reason, it is strongly recommended that Microsoft Office and Windows updates be approved and applied in advance of the Microsoft 365 implementation.

Frequently, customers will choose to apply the Microsoft 365 Apps license to all users ahead of the mailbox moves (or even SharePoint Online and Teams deployments) so all Microsoft Office versions are current and support the Microsoft 365 workloads.

Installing Microsoft 365 Apps

Installation of the Microsoft 365 Apps software is straightforward:


2. When prompted, log in to Microsoft 365 using your username and password.

3. On the Microsoft 365 portal page shown in Figure 2-27, select Install Office in the upper-right corner.

4. The Microsoft 365 portal will display additional information, as shown in Figure 2-28, which will assist in the Microsoft 365 Apps installation.

5. Click Run to begin the Microsoft 365 Apps installation.

6. If any conflicting software versions are already installed on the workstation, there is a lack of local disk space, or issues connecting to the Internet, you will receive a pop-up dialog showing the issue, as shown in Figure 2-29.
If conflicting versions are already installed on the computer, you can click the I Understand box and select Install Anyway if you want to proceed with the installation. This will remove the conflicting software version(s) and proceed with the installation. Clicking I’ll Wait will end the Office installation process.
7. As shown in Figure 2-30, once the installation has been completed, a new window will be displayed, indicating the installation is complete.

![Figure 2-30 Microsoft 365 Apps installation completion page](image)

8. Click Close to complete the installation process.

Once the installation is complete, the Office products will be available for use, and when applicable, you will be prompted to update any previous documents created in past versions of the applications.

**Inside Out**

*Microsoft 365 Apps*

Apps installed with the Microsoft 365 portal will be enabled for automatic updating. These updates will occur over the Internet, not via any internal automatic update services (such as Windows Server Update Services) configured in your organization. Microsoft also provides resources for centralized deployment of Microsoft 365 Apps using either Group Policy, System Center Configuration Manager, or Microsoft Endpoint Manager (Intune). You can learn more about additional deployment methods for Microsoft 365 Apps at [https://docs.microsoft.com/en-us/mem/intune/apps/apps-add-office365](https://docs.microsoft.com/en-us/mem/intune/apps/apps-add-office365).
Activation

Activation is the last step and is a process whereby the Office application will connect to Microsoft 365 to ensure that the user is properly licensed by the tenant to use it.

The good news is that activation is automatic. No additional action is required on the user’s part to activate their Office installation. Activation does, however, require that the computer has Internet access available to complete the process.

TIP

As you’ve already learned, Microsoft 365 Apps are typically licensed in a per-user model. (A per-device model is available under some license agreements, but it is outside the scope of this book.) Each user is entitled to five desktop installations. If you have roaming or shared computer scenarios, you might find that each time a user logs into a new machine, they consume one of their five allotted licenses. To account for this, you can configure Shared Computer Activation for those computers. User logins for Shared Computer Activation won’t count against the user’s total count. A user still must be licensed for Microsoft 365 Apps for Shared Computer Activation. Shared Computer Activation can be enabled through the setup configuration file or Group Policy. For more information, see https://docs.microsoft.com/en-us/deployoffice/overview-shared-computer-activation.

Once Office is installed on a user’s workstation, the system will try daily to reach the Microsoft Office Licensing Service activation endpoint on the Internet. If it is unsuccessful, it will retry daily for up to 30 days before the applications enter reduced functionality mode.

In reduced functionality mode, the software will remain installed on the workstation, though your users will only be able to view and print documents. Any features related to document editing or the creation of new documents will remain disabled until they either enter a product key or successfully authenticate with Microsoft 365.

If Office cannot reach the licensing service for more than 30 days, the reduced functionality mode will display a Product Deactivated dialog screen, as shown in Figure 2-31.

![Figure 2-31 Product Deactivated dialog box](Image)
Synchronizing your users

The next step in your deployment of Microsoft 365 will be the synchronization of your users to Azure Active Directory.

Synchronization is performed using the Azure Active Directory Connect tool, typically referred to as Azure AD Connect or AAD Connect. AAD Connect is a free download from Microsoft for Microsoft 365 users and is based upon the Microsoft Identity Manager (MIM) product line.

While simple in theory, the directory synchronization process can be very involved when installing and configuring the AAD Connect tool. In addition to selecting objects and organizational units, the AAD Connect tool can also be configured to support features like pass-through authentication, group writeback, password writeback, Exchange Hybrid writeback, and device writeback.

Chapter 9, “Identity and authentication planning,” and Chapter 10, “Installing AAD Connect,” contain an in-depth look into directory synchronization, features, and installation options.

Once the synchronization engine has been installed, it is important to pay attention to the synchronization statistics for each of the run profile steps on the Operations tab of the AAD Connect tool, as shown in Figure 2-32.

![Figure 2-32 The Operations view in AAD Connect](image)

While it is important to review all errors reported in the Status column, those operations for the Azure connector, typically named tenant.onmicrosoft.com, should be reviewed carefully.

Any errors on the Azure connector will mean either bad or missing data in Microsoft 365. In fact, if the IDFix tool has been run and all issues are resolved before installation of the AAD Connect tool, the Azure connector should not show any errors related to data problems.

If errors do appear in the synchronization statistics view, the data provided there might not be sufficient to diagnose the issue adequately. In those cases, we recommend reviewing the Application Event Log for more detail.
While it’s not 100 percent inclusive of events returned by the AAD Connect engine (primarily because the tool is constantly evolving and maturing), this data represents the most common and important events that should be reviewed and included in any event log monitoring utilities.

**Licensing your users**

Once a cloud user has been created, and you have started synchronizing identities to your tenant, you will need to assign licenses to your users before they can begin consuming Microsoft 365 services.

Licensing plans and subscriptions were explained in detail in Chapter 1, though there are several methods available for licensing users in Microsoft 365. It is important to understand each available method so you can pick the best option for you. Currently, there are three primary methods for license assignment in Microsoft 365:

- Azure Active Directory group–based licensing
- PowerShell licensing cmdlets included in the MSOnline PowerShell module
- Manual licensing via the Microsoft 365 portal

**Group-based licensing**

One of the most popular features available for licensing in Microsoft 365 is group-based licensing, commonly referred to as GBL.

Group-based licensing is a feature that requires either Azure AD Premium Plan 1 or Azure AD Premium Plan 2. It is one of the quickest, easiest, and most effective ways to manage Azure AD licenses. As the name implies, group-based licensing uses Azure AD groups for the assignment of licenses to users.

Licenses are assigned to either security groups, which are synchronized to Azure via the Azure AD Connect tool, or to cloud-only groups created directly in Azure.

In the example shown in Figure 2-33, an on-premises security group and its membership has been synchronized to Azure AD, and the Exchange Online Enterprise E3 license is assigned (1 of 26 enabled services).

![Figure 2-33 Group-based license assignment in the Azure portal](image)
Additionally, dynamic groups can be created in the Azure portal and configured to define membership based on synchronized attributes. The creation of Azure AD dynamic groups, shown in Figure 2-34, requires an Azure AD Premium license.

![Figure 2-34  Creating a dynamic group in the Azure portal](image)

Once a dynamic group has been created in the Azure portal, the group can then be used for automatic license assignment via group-based licensing, as shown in Figure 2-35.

![Figure 2-35  Assigning licenses to an Azure dynamic group](image)

It is important to note the following details regarding Azure AD group-based licensing:

- All existing Microsoft Azure license types are supported by Azure AD group-based licensing.
- Group membership updates made in on-premises groups synced to Azure AD are effective within just a few minutes of a membership change.

- Users can be members of multiple groups, and licenses across groups are combined.

- If no licenses are available within the tenant, group-based licensing will be unable to assign licenses to a user, and no error will be returned.

- Licenses assigned via a group cannot be manually removed via PowerShell or the portal.

- Users can have licenses assigned via multiple groups or direct assignment (PowerShell and manual).

- Users can have licenses through multiple means, such as manual licensing applied through PowerShell or group-based licensing.

**PowerShell licensing**

The second licensing method is using the provided PowerShell cmdlets in the Azure Active Directory PowerShell for Graph module.

This PowerShell module includes several cmdlets that can be used for user license assignment in Azure AD. These cmdlets can assign users SKUs and enable or disable specific plans under the SKU.

1. All users must have a Usage Location assigned to be licensed. Define the list of sub-plans that you wish to have disabled (not enabled) and assign the options directly to the user.

2. A user’s Usage Location is set automatically via the AAD Connect tool, provided the `msExchUsageLocation` value in the on-premises Active Directory is populated with a valid two-digit ISO country code. If the value is not set, the AAD Connect tool can be customized to synchronize any other Active Directory attribute (such as `CountryCode`) as Usage Location, provided it is a valid two-digit ISO country code.

3. If the Usage Location is not set via AAD Connect, it can be set programmatically using the Azure Active Directory PowerShell for Graph cmdlets as follows:

   ```powershell
   Set-AzureADUser -ObjectId userUPN@domain.com -UsageLocation YY
   ```

   In the example shown in Figure 2-36, the user Pilar Ackerman’s Usage Location has been set to US.

   ![Figure 2-36 Setting UsageLocation via PowerShell](image)
4. Next, it is necessary to retrieve a list of Subscribed SKUs available in the tenant; these can be identified using the following command:

```powershell
Get-AzureADSubscribedSkus
```

5. As shown in Figure 2-37, the `Get-AzureADSubscribedSkus` command returns a list of the SkuIds and their ObjectIds for licenses available in the tenant.

![Figure 2-37](image_url)  
Returning a list of Azure SKUs available in a tenant

6. Next, it is necessary to retrieve a list of service plans available for a particular SKU so they can be assigned to a user. The list of service plans available can be displayed using the following command:

```powershell
Get-AzureADSubscribedSkus -ObjectID <ObjectID of the desired SKU>
```

7. In Figure 2-38, you can see that the `Get-AzureADSubscribedSkus` command is used in conjunction with a `Select` statement to return a list of service plans.

![Figure 2-38](image_url)  
Returning a list of service plans from a SubscribedSku

8. Once a SubscribedSku Object ID and service plan name has been identified, the license can be assigned to a user with the following command:

```powershell
Set-AzureADUserLicense -ObjectID <user UPN> -AssignedLicenses $LicenseObject
```
9. To create the LicenseObject needed for license assignment, it is necessary to create an Azure AD License object that can be applied to the user. In Figure 2-39, you can see the steps necessary to set the License and LicenseObject.

```powershell
$License = New-Object -TypeName Microsoft.Open.AzureAD.Model.AssignedLicense
$License.SkuId = "SkuID of the license you wish to assign"
$Licenses = New-Object -TypeName Microsoft.Open.AzureAD.Model.AssignedLicenses
$Licenses.AddLicenses = $License
```

![Figure 2-39 Creating a LicenseObject for user assignment](image)

10. Finally, the License object created in the previous step can be used with the following command to assign the License object to the user, as shown below and in Figure 2-40:

```powershell
Set-AzureADUserLicense -ObjectID <User UPN> -AssignedLicenses $Licenses
```

![Figure 2-40 Assigning a license to a user with Powershell](image)

**Manual license assignment**

The final method available for license assignment is using the Microsoft 365 portal to assign user licenses manually.

Manual license assignment can be done on an individual user basis by selecting the user and editing assigned licenses or by selecting multiple users, as shown in Figure 2-41.
While the ability to assign user licenses is available via the Microsoft 365 portal for both individual and bulk assignment, it does not typically scale well for large organizations with many thousands of users. Also, it does not scale well with licensing requirements because doing so can create the need to assign licenses in various combinations based on role, location, or department.

This is why the manual assignment of licenses should be used on an ad-hoc basis and as a supplement to one of the other options for license assignment.

**What’s next?**

Now that we have discussed the major milestones involved in your Microsoft 365 tenant setup and provided guidance on each of these steps, we will move on to discussing more advanced topics such as Federation, Directory Synchronization, Exchange Hybrid setup, and tasks that will be required to help you get the most from your Microsoft 365 experience.
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