



ExtranetUserManager

For SharePoint and Office 365

By Envision IT

Running Effective Projects
In Office 365

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- Twitter @carsonpeter
- VP Toronto SharePoint User Group



Envision IT Overview

- O365 Productivity Consultants
- Go-to partner for SharePoint Websites, Intranets, Extranets, and Collaboration portals
- 14 years of SharePoint experience
- Microsoft Gold Partner
- Multiple award winner

Microsoft Partner
Gold Collaboration and Content
Silver Application Development
Silver Cloud Platform



Services

Public Websites

Intranets

Extranets

Collaboration Portals

SP Farm Health Check

O365 & Azure Cloud Services

AODA Compliance

Upgrades & Migrations

Training

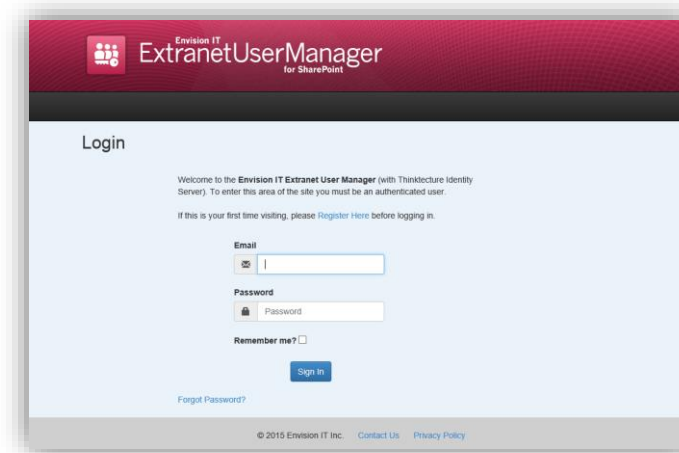
Mobile first adaptive design

Support Agreements

Solution Architecture

Workflows and Forms

Extranet User Manager



- Easy delegation of user management to business
- Self-registration, approvals, forgotten password reset
- Simplified login for both internal and external users

Agenda

- Introductions
- Project Management Background
- Project Sites in Office 365
- Governance and Permissions
- Site Provisioning
- External Users
- Wrap-Up and Q&A

Project Management Background

Project Measures

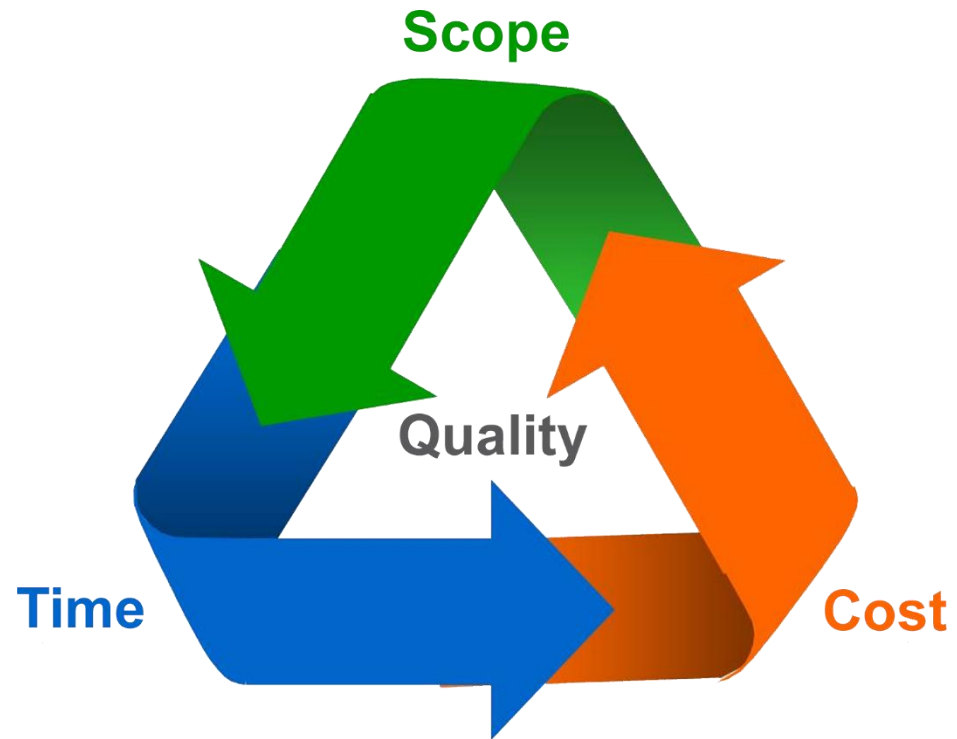
- On time and on budget
- Return on investment
- Aligned with strategic goals and objectives
- Quality
- Business Value

10 Rules of Highly Successful Project Management

1. Be Agile
2. Do Not Micromanage
3. Keep Improving Your Project Management Practice
4. Ongoing Planning
5. Work with a Sense of Urgency
6. Visualize and Communicate all Project Deliverables and Activities
7. Complete Deliverables Step-by-Step
8. Healthy Risk Management
9. Open Communication
10. Never Lose Sight of the 3-Factors: Time, Budget, and Quality

<https://www.projectsmart.co.uk/10-rules-of-highly-successful-project-management.php>

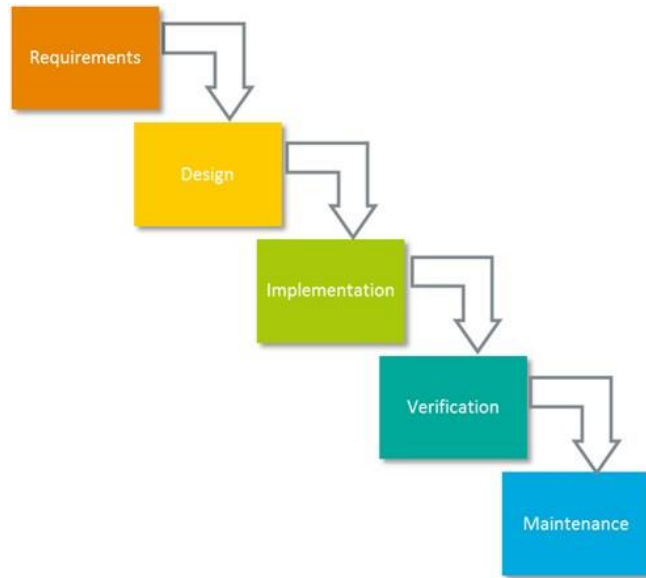
Project Management Triangle



- Scope, time, and cost are interrelated
- Not possible to optimize all three

Methodologies

Waterfall

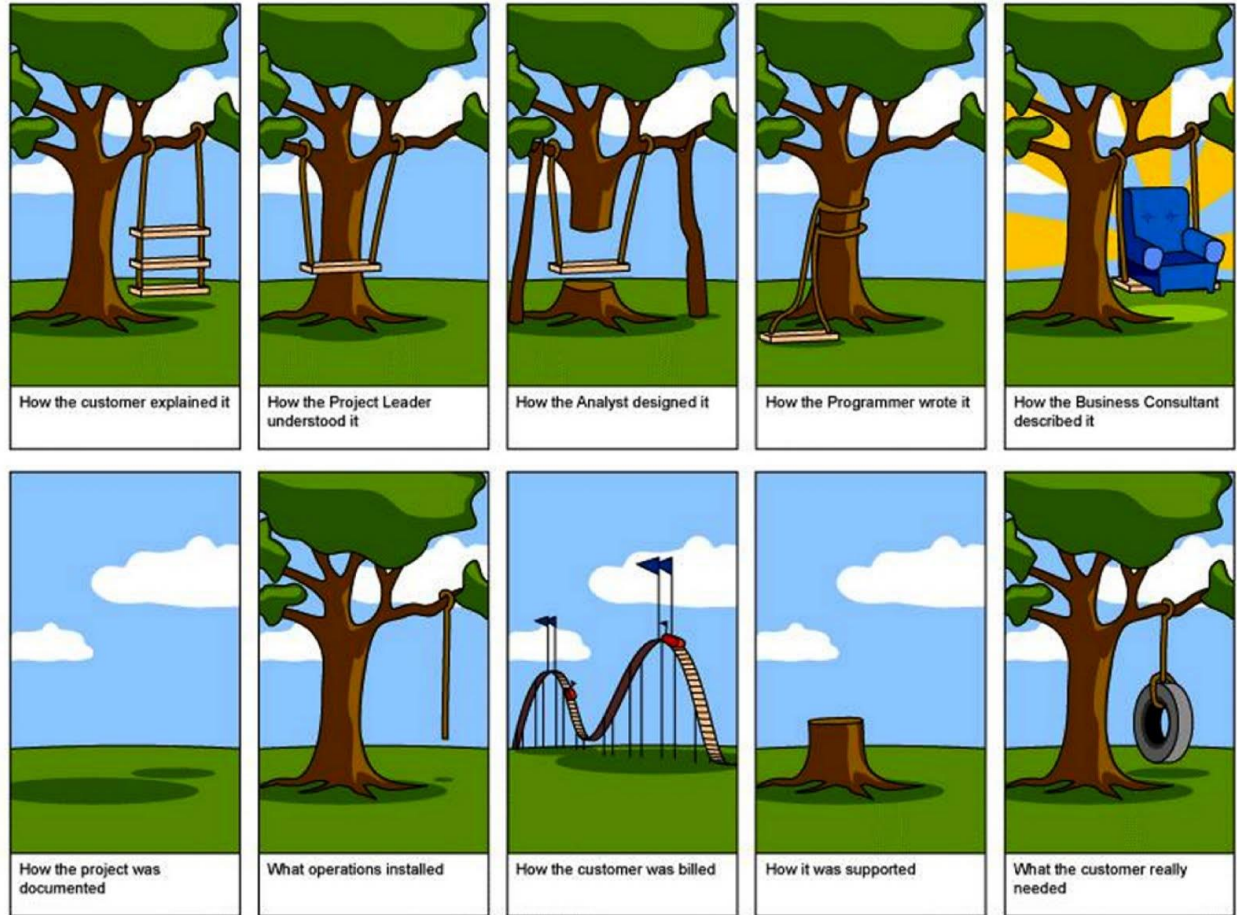


Agile



Hybrid combining elements of both

Communications



- Effective communications are key
- Both to the team and stakeholders

Communication Methods

Traditional

- In Person Meetings
- Phone calls
- Email
- Documents
 - Word, Excel, PowerPoint

Newer

- Virtual Meetings
- Instant Message
- Enterprise Social
- Portals

Poll 1

Which version of SharePoint are you currently using?

- Office 365
- SharePoint Server 2013
- SharePoint Server 2010
- SharePoint Foundation (2010 or 2013)
- MOSS 2007 or WSS 3.0

Poll 2

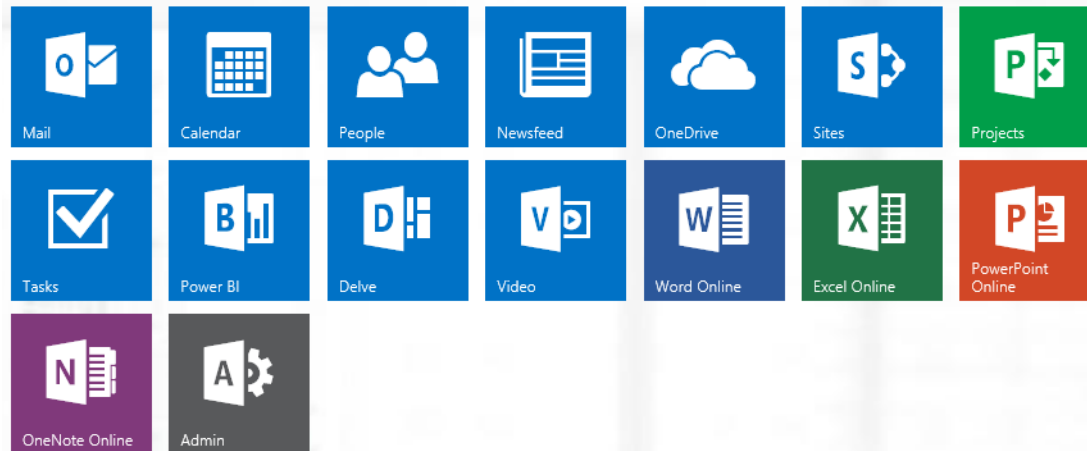
How do you use SharePoint today?

- Internal collaboration
- Internal web publishing (Intranet)
- Extranets
- Public facing website

Office 365



- Suite of desktop, mobile and browser based productivity tools
- Windows, Mac, iOS, and Android support
- Supports all the major browsers



www.envisionit.com/Events/Webinar-2015-06-11-Office-365-The-Future-is-Now

Team Sites

- Standard site template in SharePoint goes back to the beginnings in 2001
- Current template
 - Document library
 - Newsfeed
 - OneNote notebook
 - Wiki library
- Can be extended with additional lists and libraries
- SharePoint centric

Document Sets

- Folders with metadata
- Useful for simple projects
- Only deals with documents

Office 365 Groups

- Combines email and calendar from Exchange and documents from SharePoint
- Conversations are really email threads
 - These can include users external to the organization
- Calendars are true Exchange calendars
 - Can invite them to meetings through Outlook
- Documents only have version history
 - No metadata, approvals, records, etc.
- No additional SharePoint lists

Project Management Site Wish List

- Exchange email and calendar support
- OneNote for ad-hoc note taking
- Full SharePoint document libraries
- Custom lists
 - Tasks, Issues, Risks, Decisions
 - Top level Client and Project lists
- Sharing with External Users
- External systems
 - Financial, time tracking, bug tracking

Governance and Permissions

Governance

- Governance plan is a strong part of any Office 365 project
- Defines roles and responsibilities
- Not just who is allowed to do what
- Permissions are a key part
 - Not properly managing them often leads to a management mess

Permissions Options

- Permissions can be applied at any level
 - Site
 - List or Library
 - Folder
 - Item level
- Good governance encourages permissions only at the top two levels

Applying Permissions

- Permissions can be applied to users or groups
- Groups can mean many things
 - SharePoint Group
 - Office 365 Group
 - AD Group -> Azure AD Group
 - EUM Group
- Good governance encourages only applying permissions to groups

Permissions and Group Membership

- Who can manage permissions should be different than who manages group membership
- Control of permissions should be tightly controlled
- Business should own group membership

Site Provisioning Steps

- Create the project site from the template
- Create the Office 365 Group
- Create the EUM Group
- Assign ownership to all three
- Assign permissions to the project site to the Office 365 and EUM groups

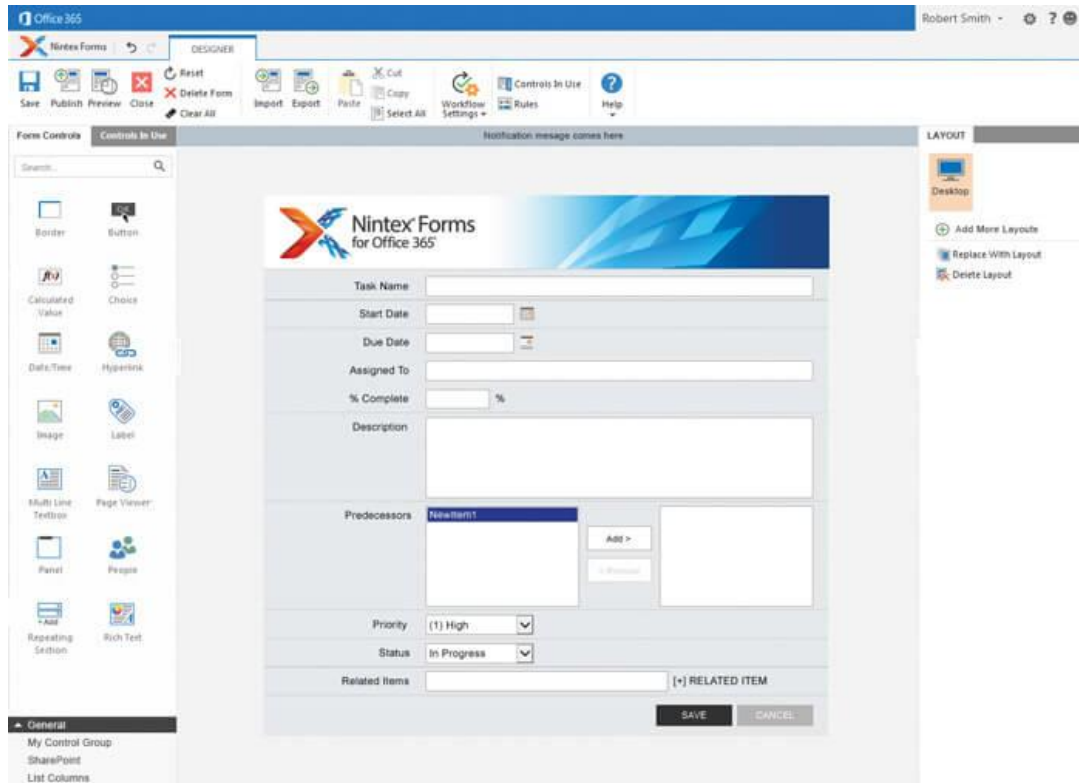
Automating the Process

- Nintex Form to request a site
- Nintex Workflow drives the approval
- PowerShell script creates the site and groups

Request Form

- Custom list
- Fields for Client and Project
 - Client may already exist, pick from a lookup
- Content approval is on

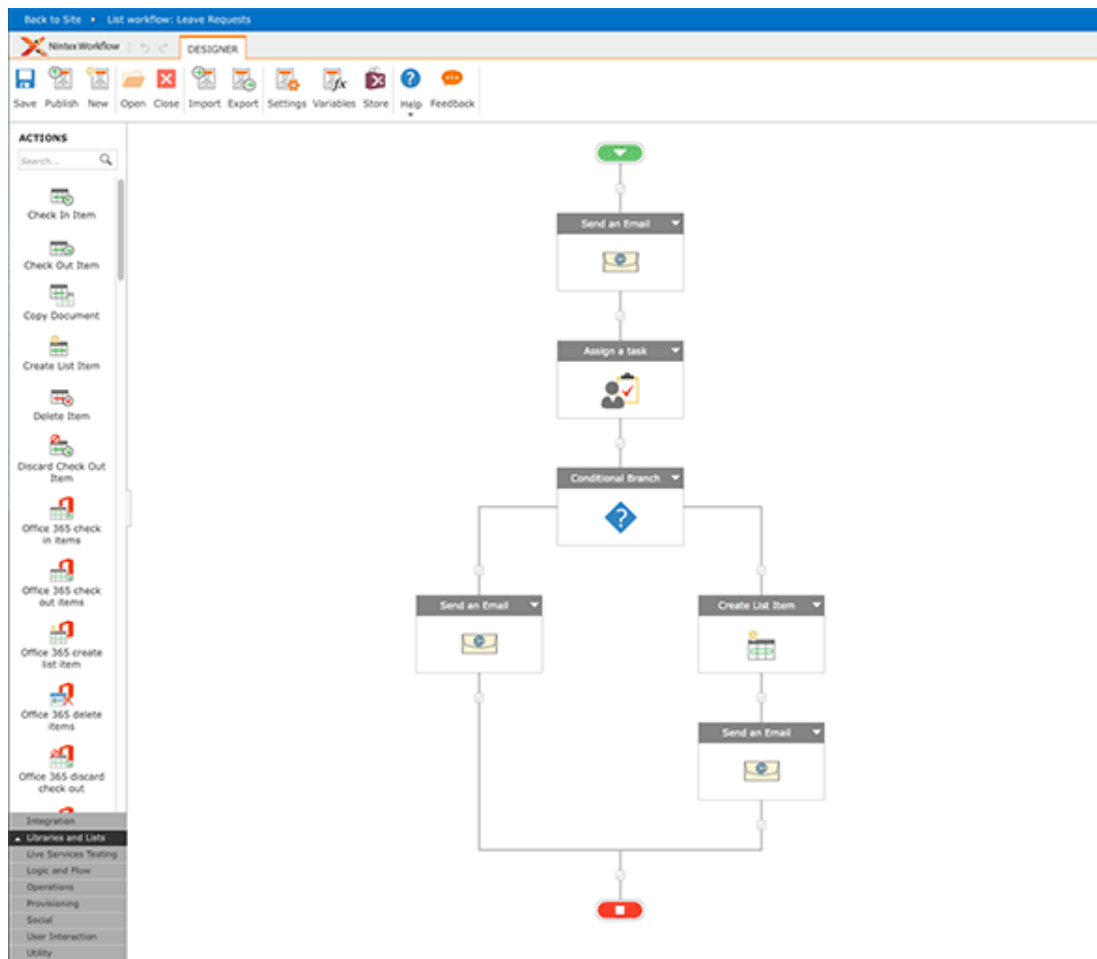
Nintex Forms



- Quick and Easy Forms Designer
- Access Anywhere, Anytime
- Seamless Workflow Integration

<http://www.nintex.com/workflow-platform/nintex-forms/forms-for-office-365>

Nintex Workflow



- Create Office 365 Workflows with clicks, not code
- Build Workflows in minutes
- Connect to a range of cloud services
- Create enterprise workflows with out-of-the-box actions

<http://www.nintex.com/workflow-platform/nintex-workflow/workflow-for-office-365>

External (Extranet) Users

Examples of Extranet Users

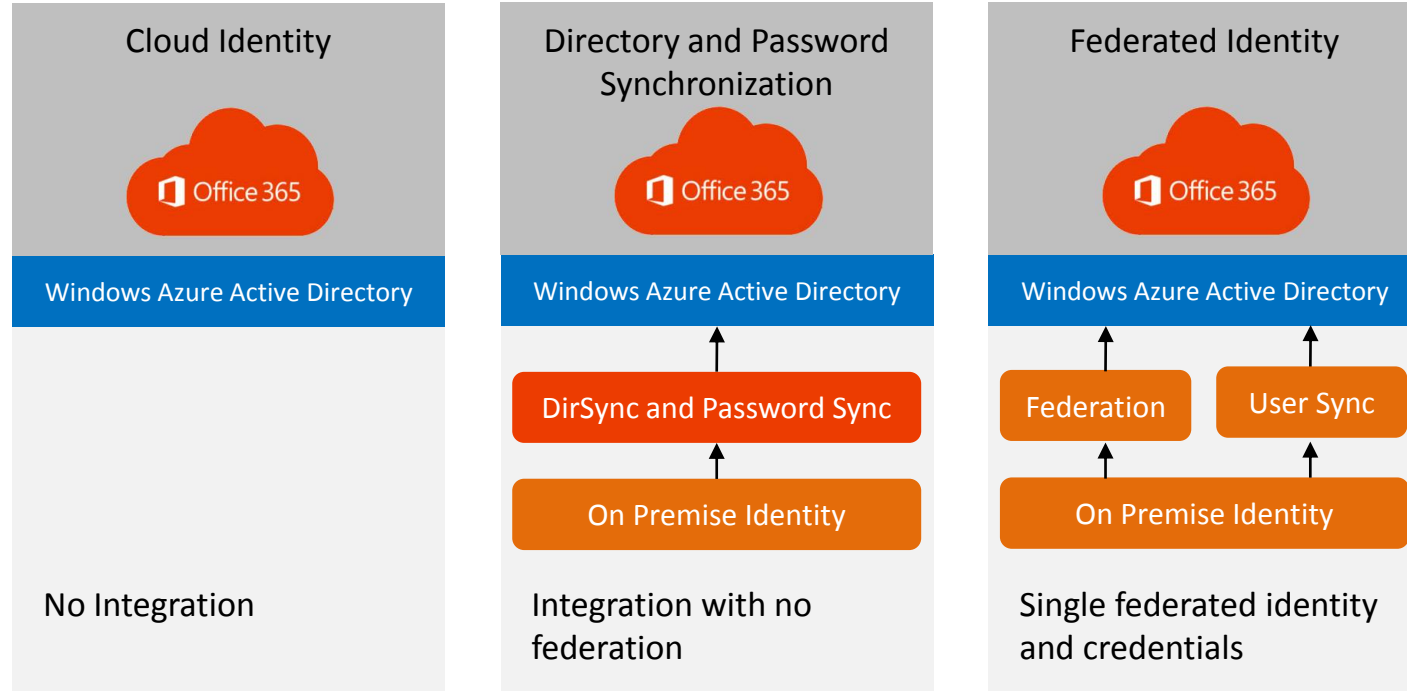
- Members
- Customers
- Vendors
- Suppliers
- Volunteers
- Board of Directors
- Citizens
- Researchers
- Tenants
- Partners

Considerations

- Who is coming into the Extranet?
- Does everyone see the same information?
- Is there a member database to interface with?
- Is it invitation only, or can people self-register
- Who approves new registrations?
- Is it just the Extranet they will be accessing, or are there other systems?

SharePoint Authentication

Office 365 Authentication Options

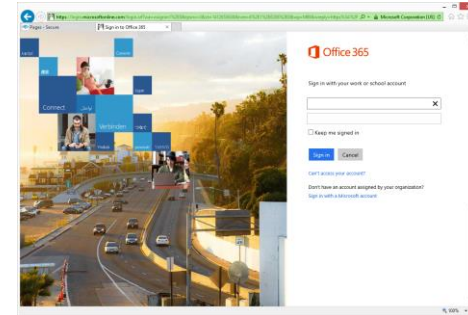


Authentication for External Users

- Creating full subscription accounts
- Office 365 External Sharing
- Extranet User Manager

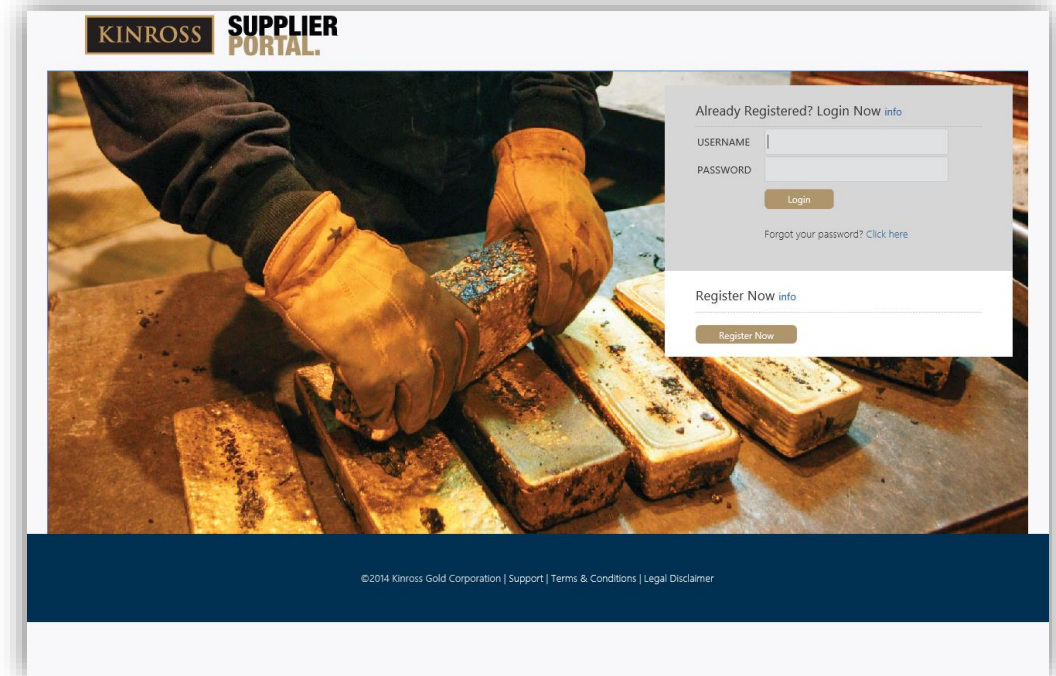
Office 365 External Sharing

- Up to 10,000 free external users in your Office 365 subscription through External Sharing
- Must use the Microsoft login form
- External users must have a Microsoft account, or be an Office 365 subscriber themselves
- No control over what account is used to accept the invitation
- “Light-weight solution”
 - Bill Baer – Microsoft Senior Product Marketing Manager and Microsoft Certified Master for SharePoint 2007 in the SharePoint product group



Extranet User Manager

- Federates with Office 365
- Provides a fully branded, customizable login experience
- Can be AD, SQL, or other user repository under the hood
- Provides Single Sign-On to multiple systems
 - Can be any SAML claims compliant system, not just SharePoint



Next Steps

- Reach out to Erika Moll, Sales
 - e: erika.moll@extranetusermanager.com
 - p: (416) 938-6854
- More product information
- A technical demo with our team
- Request a hosted trial or evaluation copy of EUM



Upcoming Events

- MVP Mix
 - Sep 25 9 AM – 5 PM
 - SharePoint Cross-Site Publishing Simplified Session
 - Microsoft Canada Meadowvale
 - www.envisionit.com/Events/MVP-Mix-2015-09-25-SharePoint-Cross-Site-Publishing-Simplified

Questions?