

ExtranetUserManager

For SharePoint and Office 365

By Envision IT

Running Effective Projects
In Office 365

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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



Agenda

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

Project Management Background

Project Measures

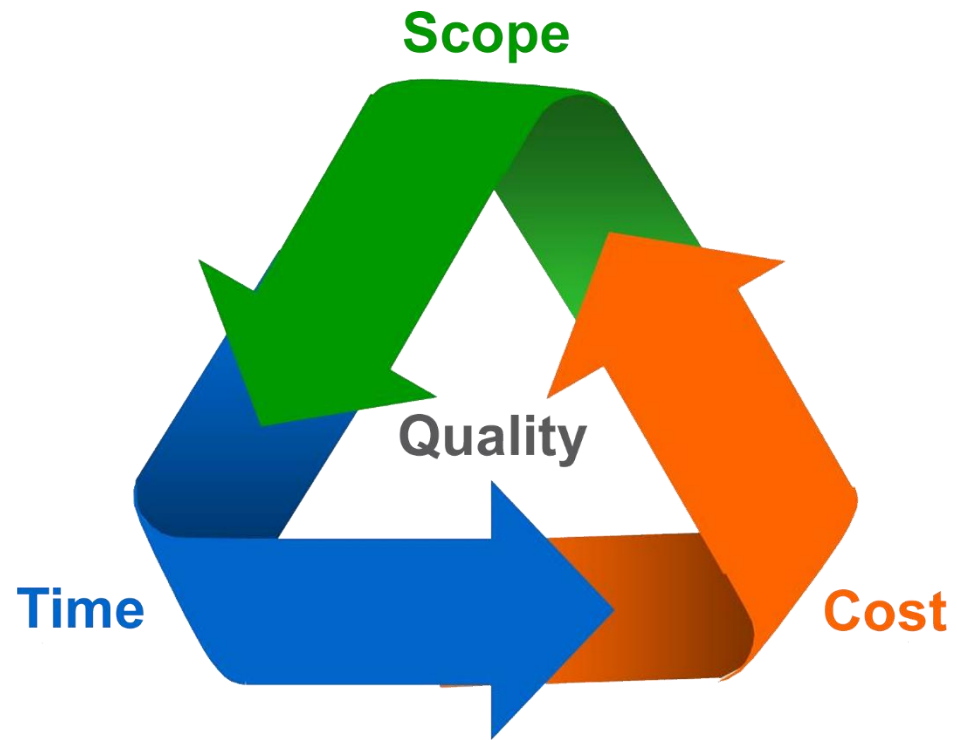
- On time and on budget
- Return on investment
- Aligned with strategic goals and objectives
- Quality
- Business Value

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>

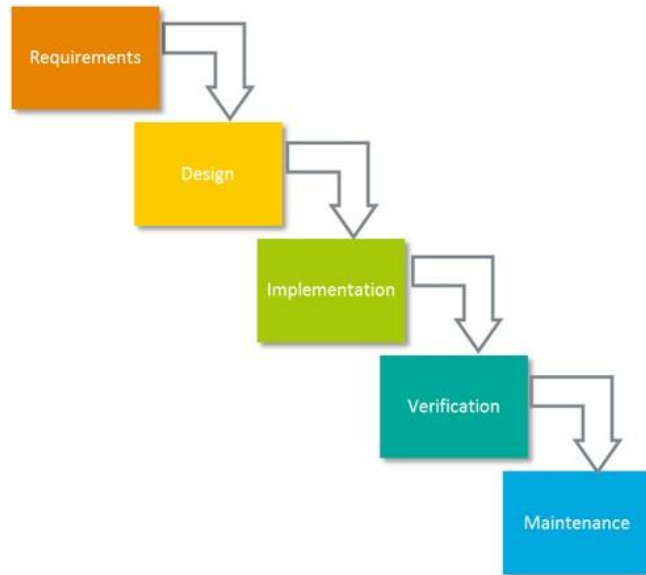
Project Management Triangle



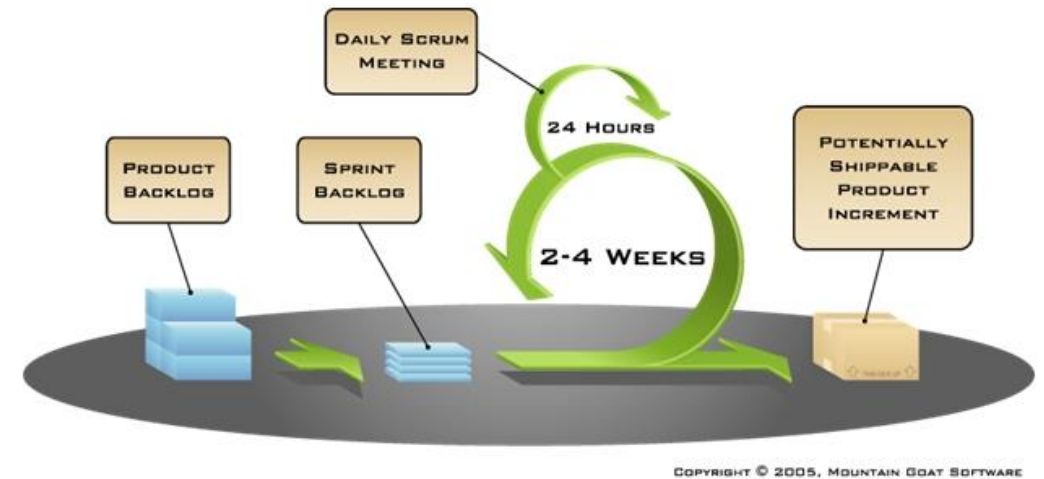
- Scope, time, and cost are interrelated
- Not possible to optimize all three

Methodologies

Waterfall

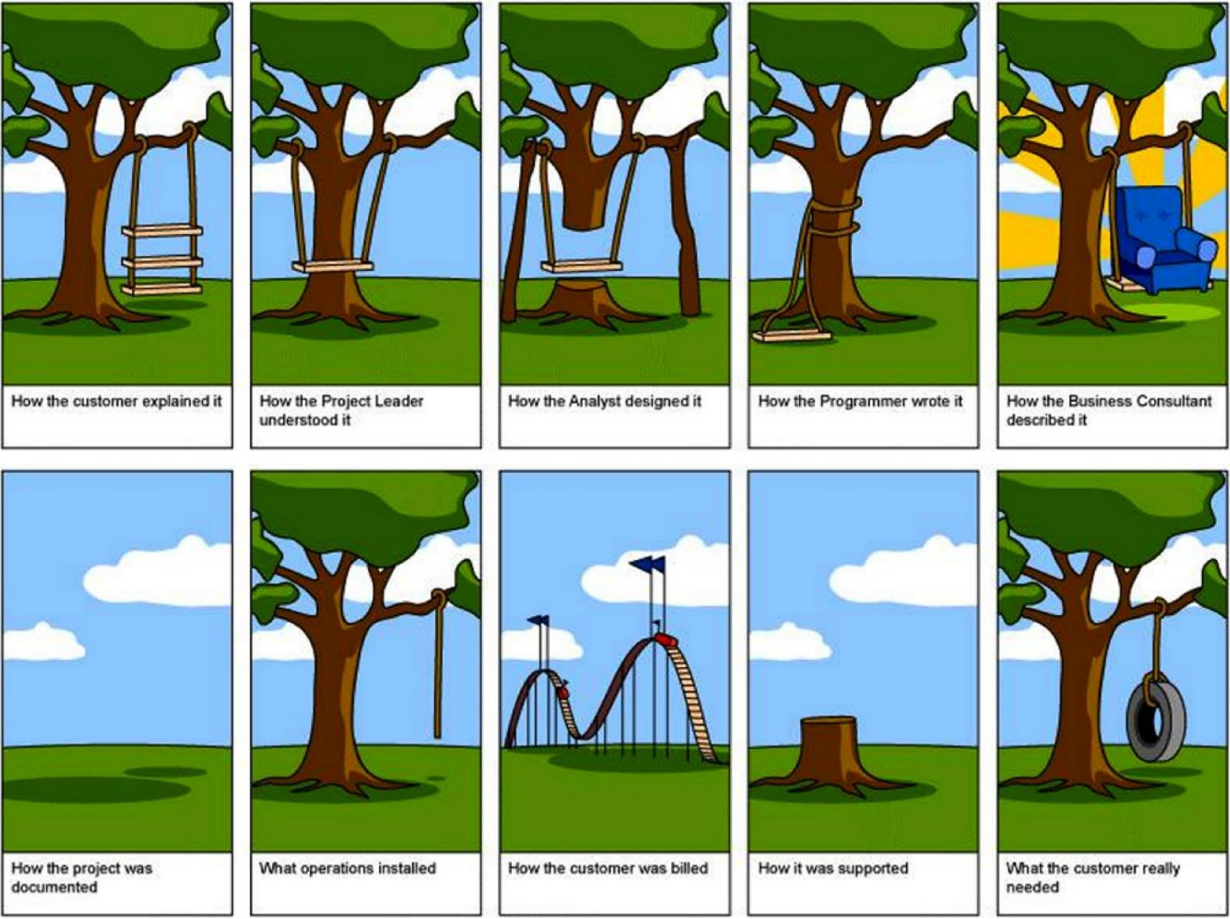


Agile



Hybrid combining elements of both

Communications



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

Communication Methods

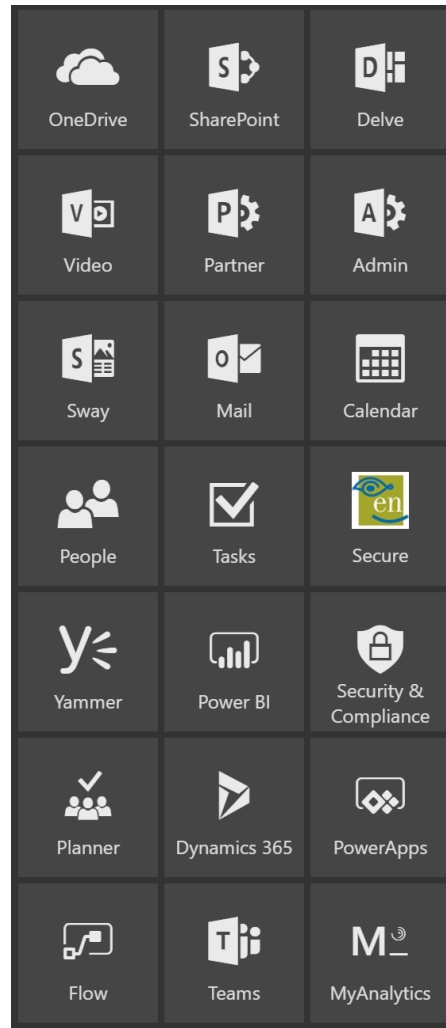
Traditional

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

Newer

- Virtual Meetings
- Instant Message
- Enterprise Social
- Portals

Office 365



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

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

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

Office 365 Groups



SharePoint Team Sites and Office 365 Groups

- January 2017 Groups got full SharePoint team sites
- February 2017 rollout of creating Office 365 Groups from SharePoint Home
- <https://techcommunity.microsoft.com/t5/SharePoint/UPDATE-Create-Office-365-Groups-with-team-sites-from-SharePoint/td-p/48277>

Office 365 Planner

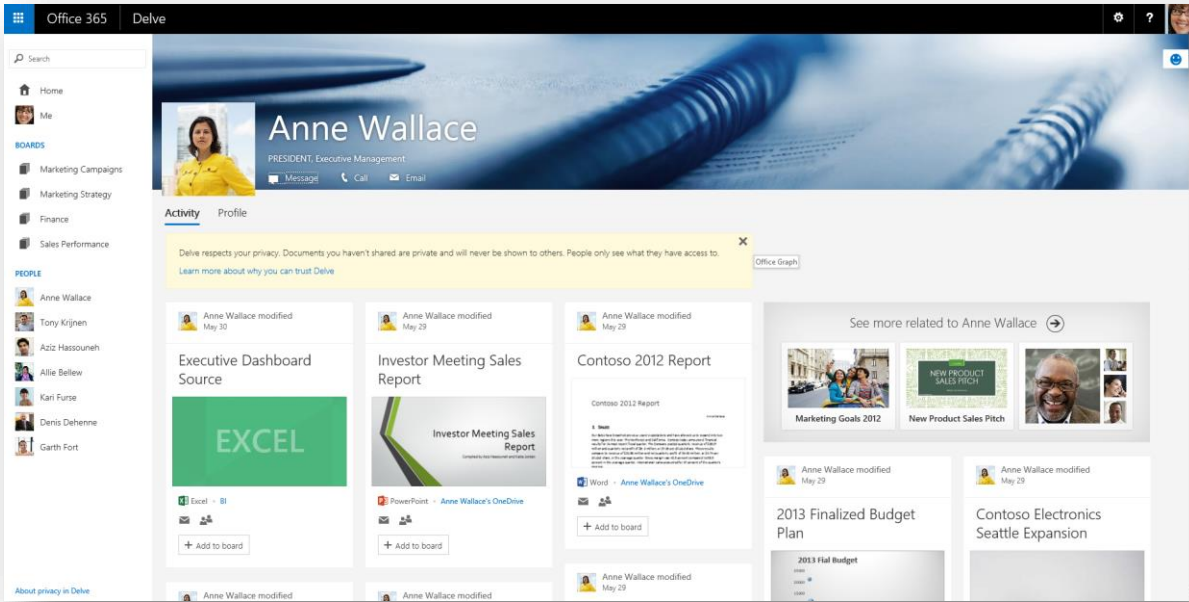
The top screenshot shows the 'Marketing Campaign' plan in the Office 365 Planner. It features a central board with several task cards: 'Campaign Budget' (a bar chart), 'BingAds' (a Bing Ads strategy document), 'Launch Event' (a social media post), 'Positioning Framework' (a document), 'The Morning Show' (a social media post), 'Magazine Coverage' (a social media post), 'Twitter Feed' (a social media post), 'European Tour' (a map), and 'Updated Logo' (a document). The bottom screenshot shows the 'Board' view for the same campaign. It displays a progress chart with 13 tasks left, categorized by status: 7 Not started, 3 Late, 3 In progress, and 0 Completed. A list of tasks is shown with progress bars and assigned team members: Unassigned, Alex Darrow, Bonnie Kearney, Fabrice Canel, Garret Vargas (Late: 2), and Sara Devis. A task card for Garret Vargas is highlighted, showing a search bar and a list of tasks: Campaign Budget (9/2), The Morning Show (9/10), and Case studies (11/12).

- Extension of Office 365 Groups
- 1:1 between Groups and Plans
- Tasks are represented as cards
 - Associated due dates, attachments, categories and conversations
- Cards organize into Boards
- Hub view tracks progress across all plans
- Documents have same limitations as in Groups

Office Graph

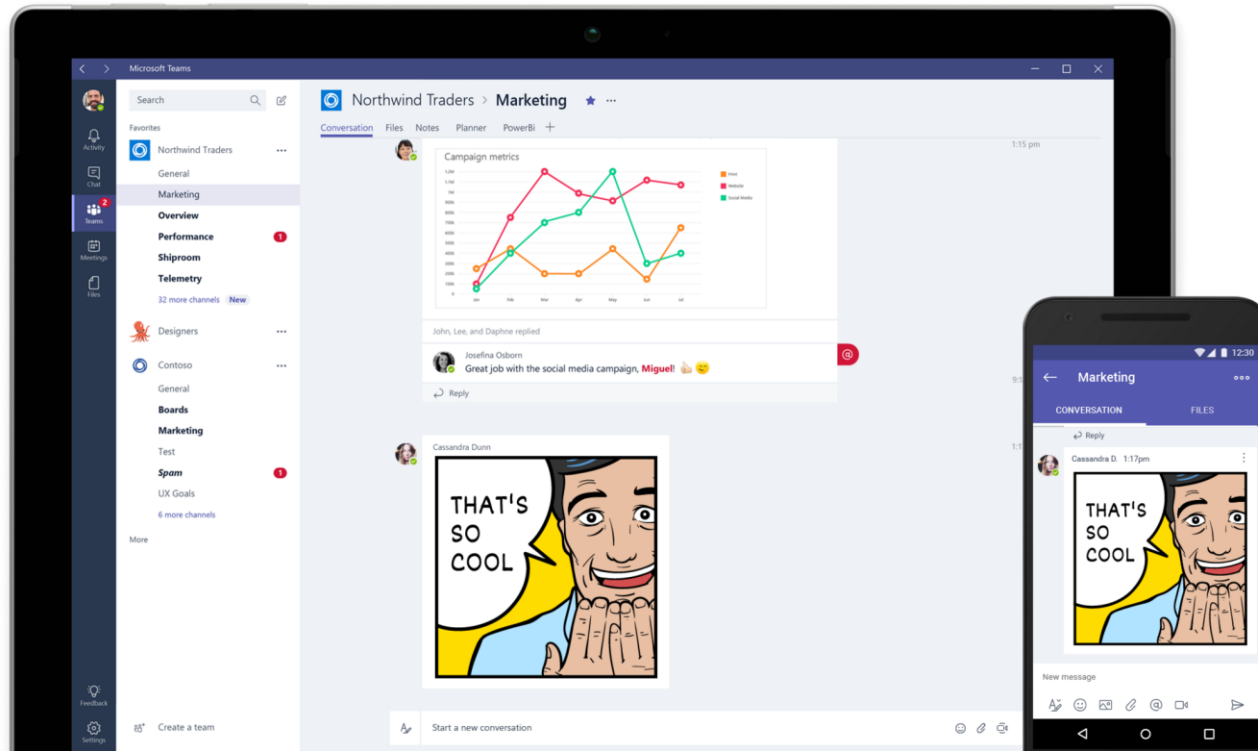


Delve



- Powered by the Office Graph
 - Collects signals of activities people are doing
- Drives information discovery through your connections to other people
- Machine intelligence
- Auto builds profile pages

Teams



- Chat for today's teams
- Modern conversation experience
- Persistent, threaded chats
- Skype is integrated for voice and video conferences

Conversations Choices

May involve one or more of the following

- Outlook (Exchange email)
- Yammer conversations
- Teams persistent chat

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

SharePoint 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

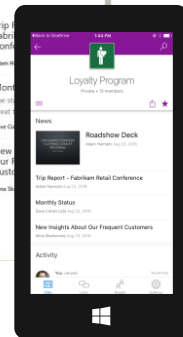
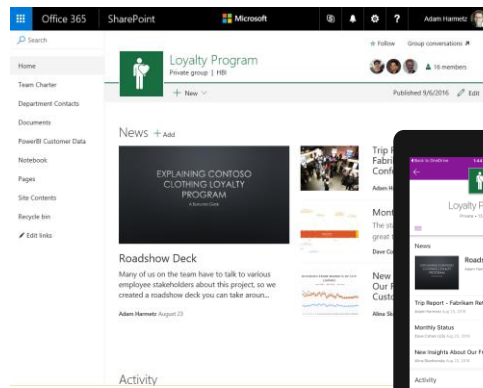
Site Templates and Provisioning

SharePoint: Mobile and Intelligent Intranet

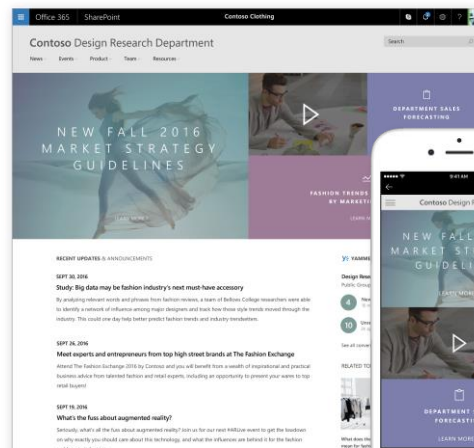


Native mobile experiences

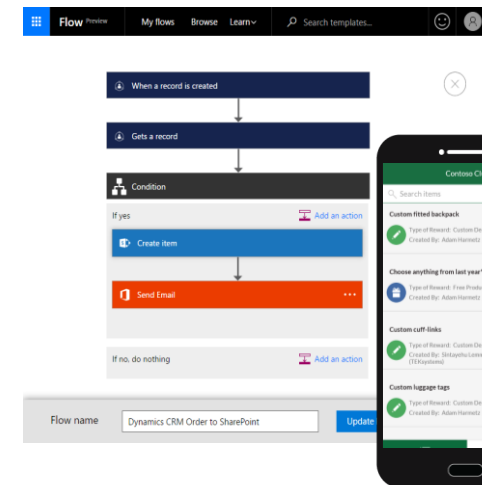
Team Sites



Portals & Publishing



Business Apps



Office 365 Groups



Microsoft Graph

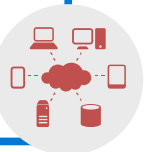


SharePoint Framework



Security & Compliance

Hybrid



Modern & Classic Document Libraries

Classic is still right for some organizations

Not all features from classic are in modern yet

You control modern UX exposure

Keeping you productive while we roll out modern UI is a top priority

We support classic & modern experiences side by side

Classic is still the right choice for some customized environments

The choice of which to use where is up to you

Control at many levels

Tenant switch (Admin center)

Site collection and web switches (PowerShell -> enable hidden feature)

Library switch (Advanced settings)

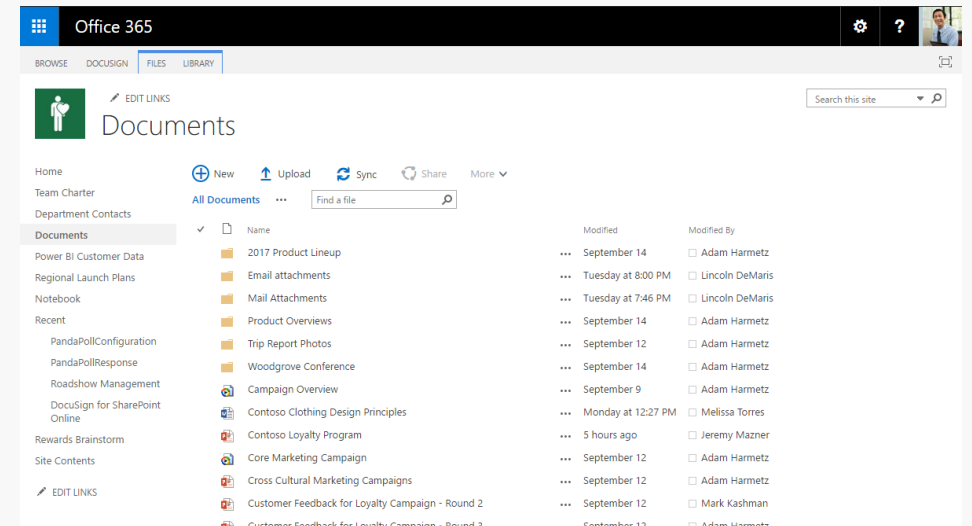
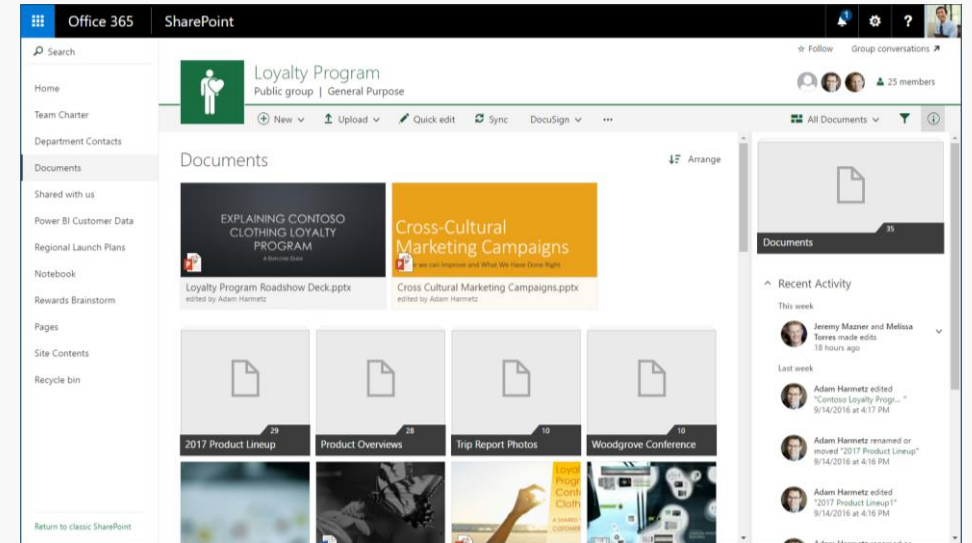
“Back to Classic” link (Single session)

Lowest-level setting wins

Default tenant configuration: Auto-detect

Modern UX is used by default

Certain features configured on the library will cause it to default to classic mode



Will we remove classic mode?

Aspiration is clear; timeline is not

We want everybody to choose our modern experiences

The choice is up to you – we provide opt out switches

When and if usage data shows classic is no longer used, we may think about deprecating classic

Classic deprecation will not happen in 2017

Getting from here to there

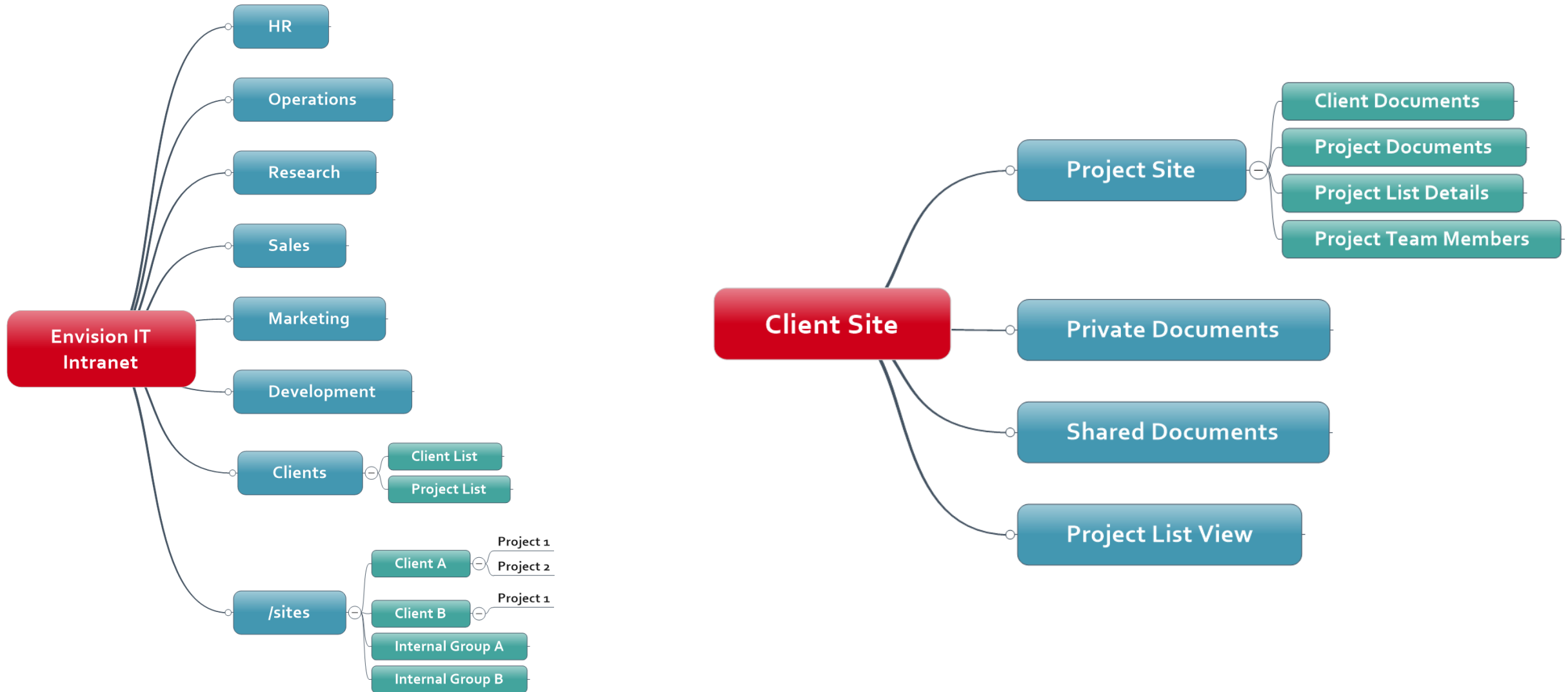
Modern UX releases will initially focus first on common use cases

We'll grow from there by watching usage data & listening for feedback

We will continually update to address core adoption blockers & issues

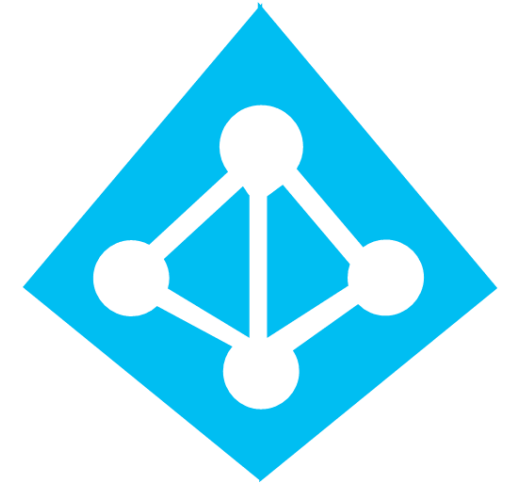


Information Architecture

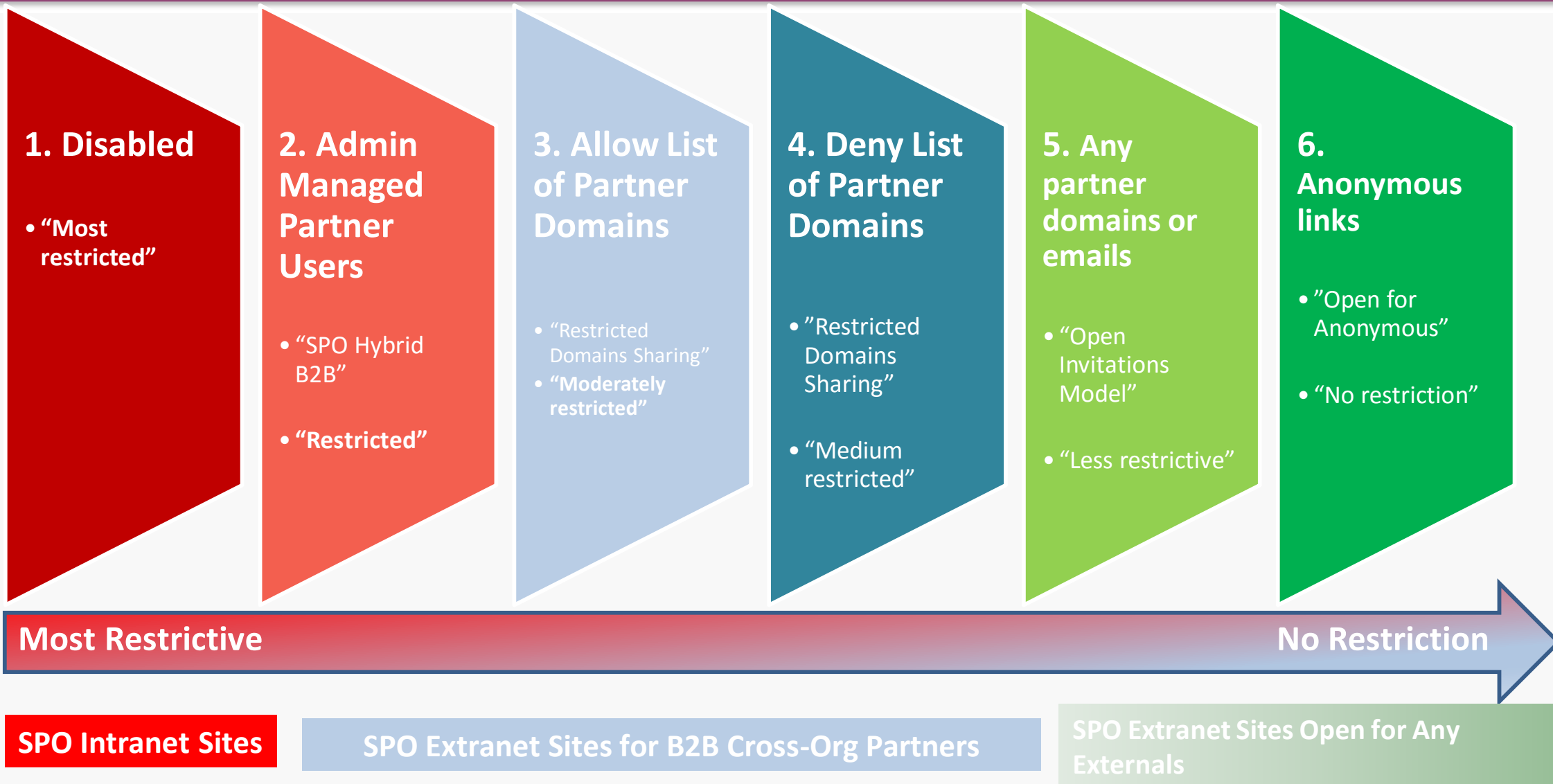


Groups and Permissions

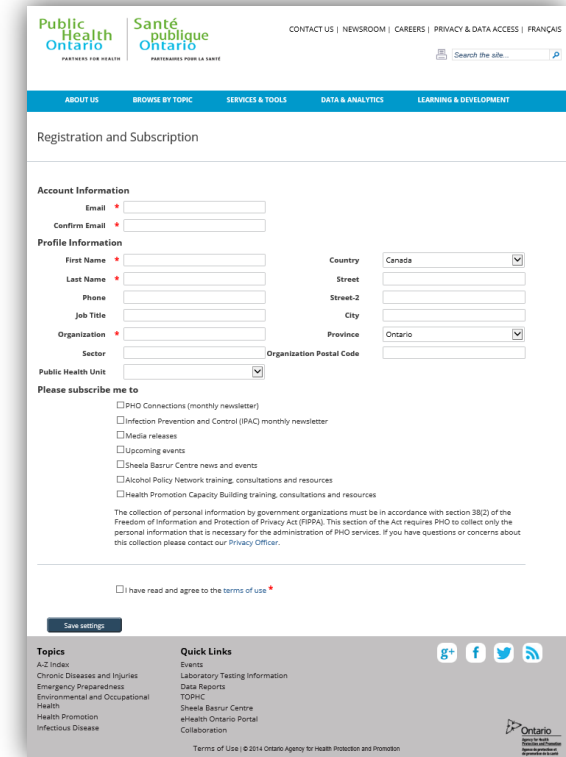
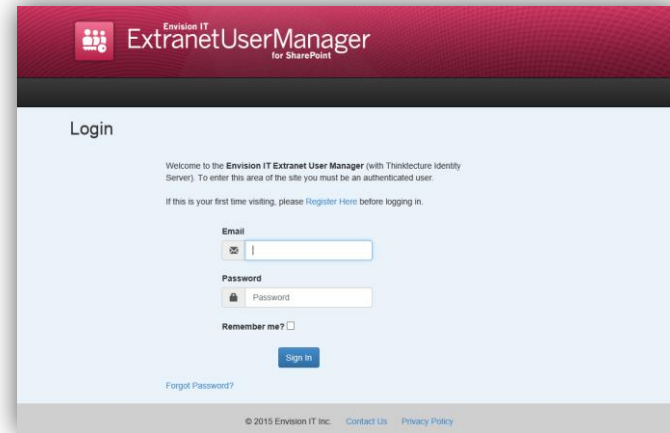
- All staff
 - AD group synced to Azure AD
 - Read-only access
- Office 365 Group
 - Members are contributors
 - Owners of the EUM B2B group
- Azure AD B2B Group
 - External users from client with read-only access
 - Contribute to Client Documents
 - No access to Private Documents
 - Membership managed by Extranet User Manager



Governance Over Partner Invitations



Extranet User Manager



- Easy delegation of user management to business
- Self-registration, approvals, forgotten password reset
- Branded user experience

Manual Site Provisioning Steps

- Create the modern SharePoint team site -> this creates the Office 365 Group
- Apply the site template
- Create the EUM / B2B Client Groups
- Assign ownership of the EUM / B2B group to the Office 365 Group
- Assign permissions to the sites, lists, and libraries to the AD, Office 365 and EUM / B2B groups

Automating the Process

- SharePoint List and/or Nintex Form to request a site
- SharePoint Alert, Flow or Nintex Workflow drives the approval
- PowerShell script creates the site and groups and applies the Office Dev PnP site template

SharePoint Patterns and Practices

Code samples

Reusable components and solutions

Guidance documentation

Monthly community calls

Case Studies

SharePoint Framework

SharePoint add-ins

Microsoft Graph, Office 365 APIs etc.

Remote provisioning and client side development

<http://aka.ms/SharePointPnP>



SharePointPnP



2013

Internal

Internal initiative in Microsoft to start collecting learnings from add-in model

2014

Going public

Going first public in CodePlex, then moved to GitHub. Concentration on add-in model enterprise scenarios.

2015

Reusability

PnP Provisioning Engine introduced. Reusable components and solutions, like PnP Partner Pack introduced. Weekly webcasts started.

2016

Partnership

PnP ownership moved to engineering, team works with a partnership on aligning roadmap. Work with SP Framework starts.



More than **2000** tenants use PnP

Core Component in SharePoint Online. Numerous also on-prem.

More than **280 million**

requests using PnP Core Component in September before 13th.

More than **150** samples to learn and

take advantage from in your work

More than **11000** unique visitors

during past 2 weeks in PnP repositories

More than **300** contributors in the GitHub for

the PnP and SP repositories.



PnP Provisioning Engine

Part of the SharePoint PnP initiative deliverables

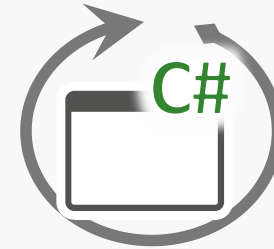
- Open source, community-driven

Released originally spring 2015

Used in more than 500 tenants in SharePoint online during past 3 months

Can be used using managed code or with PnP PowerShell

Extract templates from existing sites and optional serialization



Available as NuGet package for code and also from PnP PowerShell



Connectors

Connectors to store templates and potentially assets to file system, SharePoint or Azure storage.

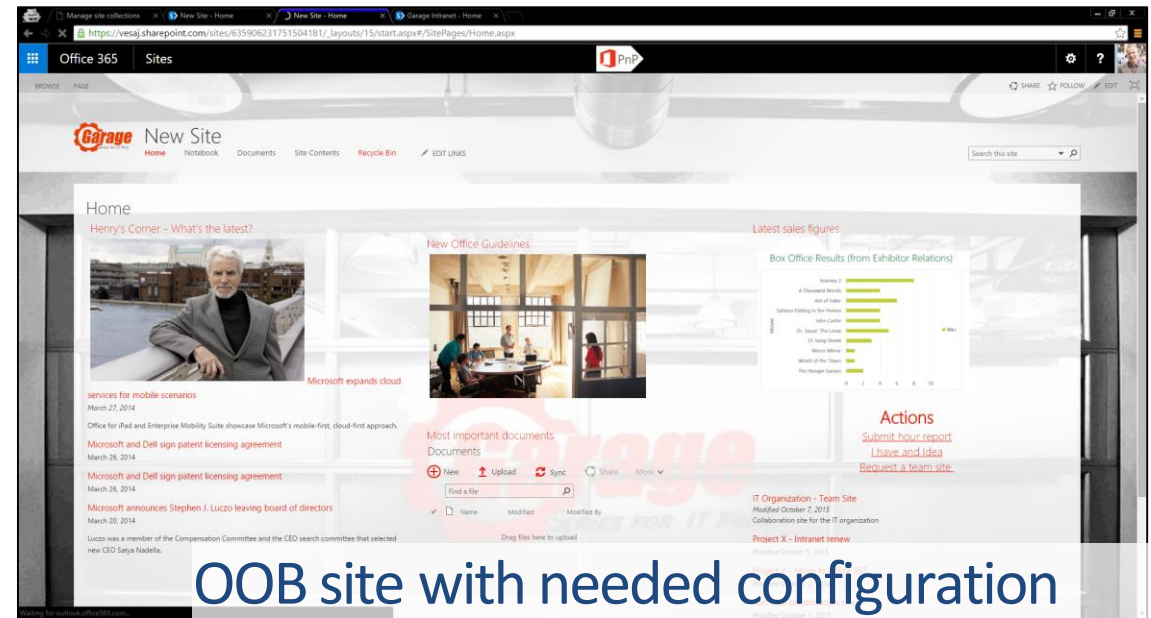
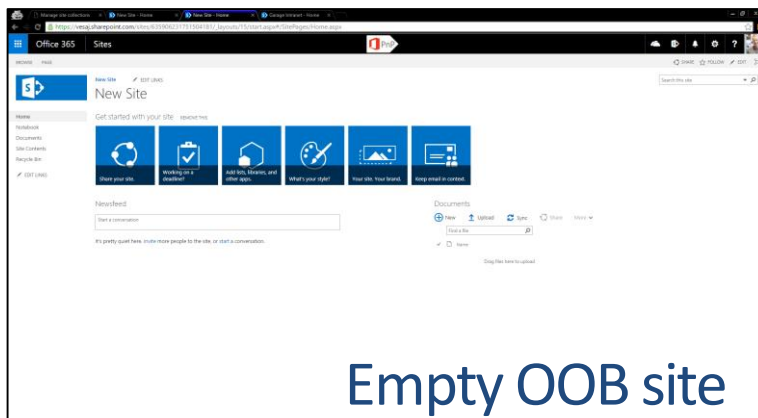


You can use code to create and apply templates, but you can also serialize them, if needed



OpenXML based template with configuration and assets, like images or theme definitions

PnP Provisioning Engine – Export/Import



Wrap-Up Points

- Office 365 Groups are a great way to manage projects
 - SharePoint, conversations, calendar, OneNote, Skype, Planner, Delve
- Decide which conversation formats make sense for your teams
 - Outlook, Yammer, Teams (persistent chat)
- Put your governance in place
- What is your external user policy?
- Figure out your Information Architecture and site templates
- Build a provisioning process

Upcoming Event

- Webinar: Running Effective Projects in Office 365 - The Associated Engineering Story
 - Wednesday, June 21 1:00 PM - 2:00 PM EDT



www.envisionit.com/events

Questions?