

ExtranetUserManager

For SharePoint and Office 365

By Envision IT

Running Effective Projects
In Office 365

October 28, 2015



Peter Carson



- President, Envision IT
- SharePoint MVP
- Partner Seller,
Microsoft Canada
- peter.carson@extranetusermanager.com
- <http://blog.petercarson.ca>
- www.extranetusermanager.com
- www.envisionit.com
- Twitter @carsonpeter
- VP Toronto SharePoint User Group



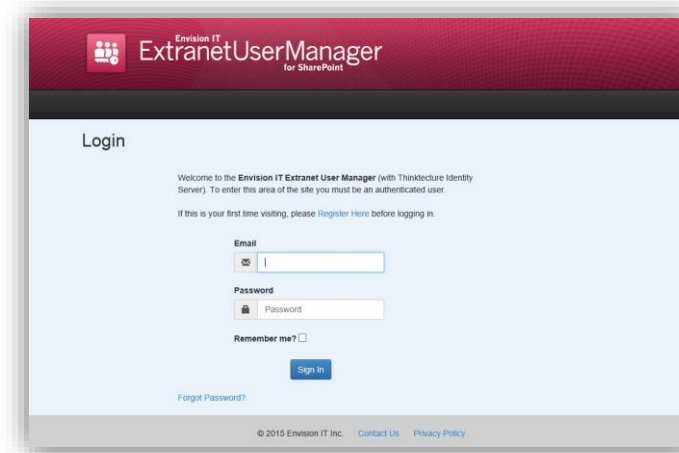
Envision IT Overview

- 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



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

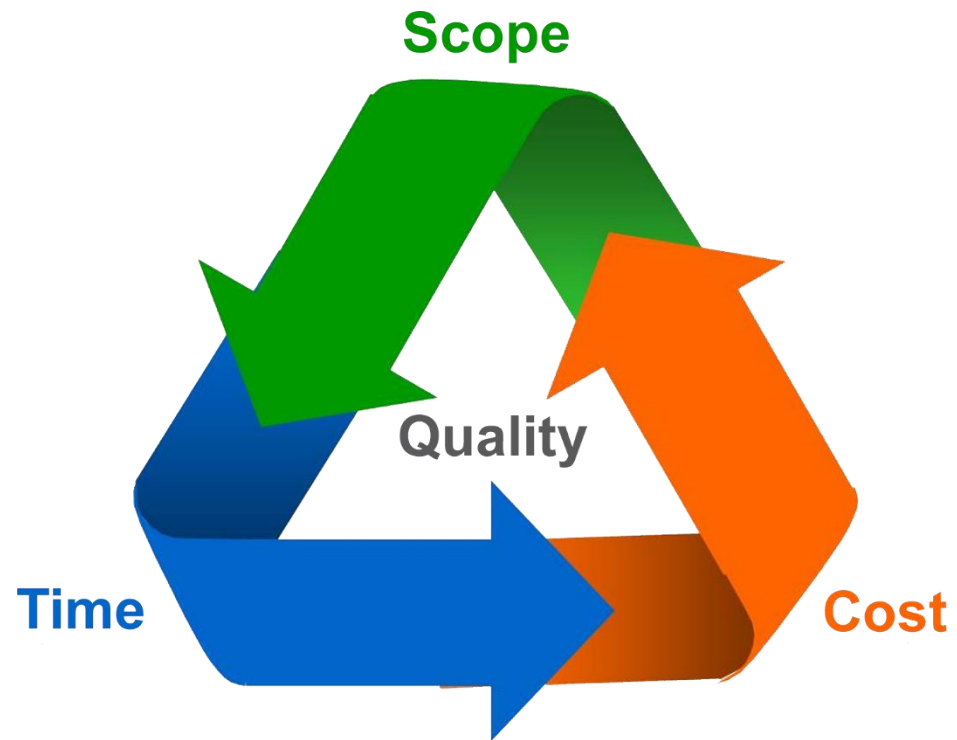
- On time and on budget
- Return on investment
- Aligned with strategic goals and objectives
- Quality
- Business Value

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>

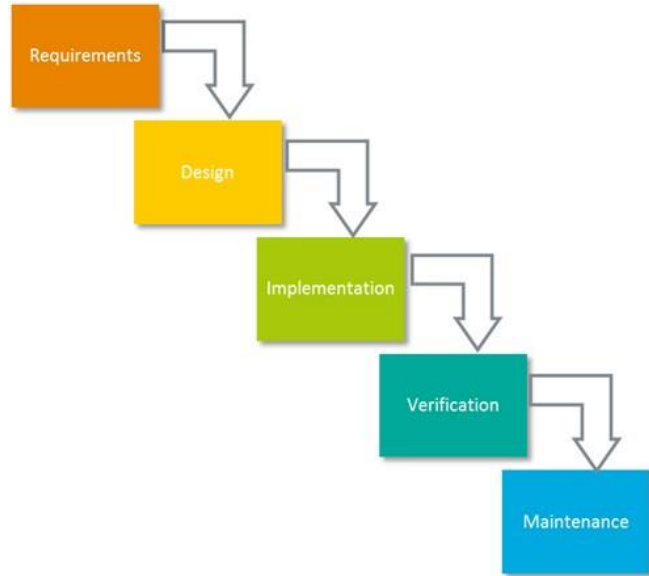
Project Management Triangle



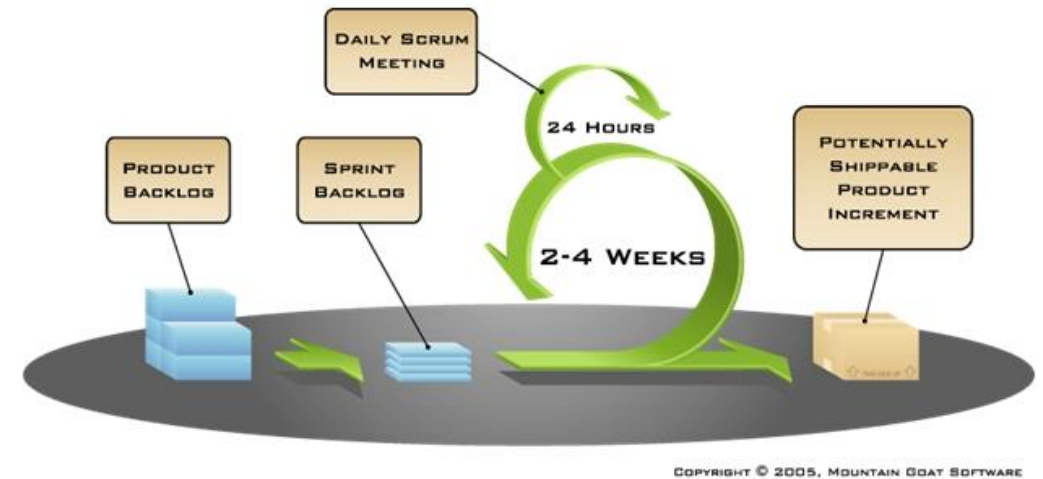
- Scope, time, and cost are interrelated
- Not possible to optimize all three

Methodologies

Waterfall

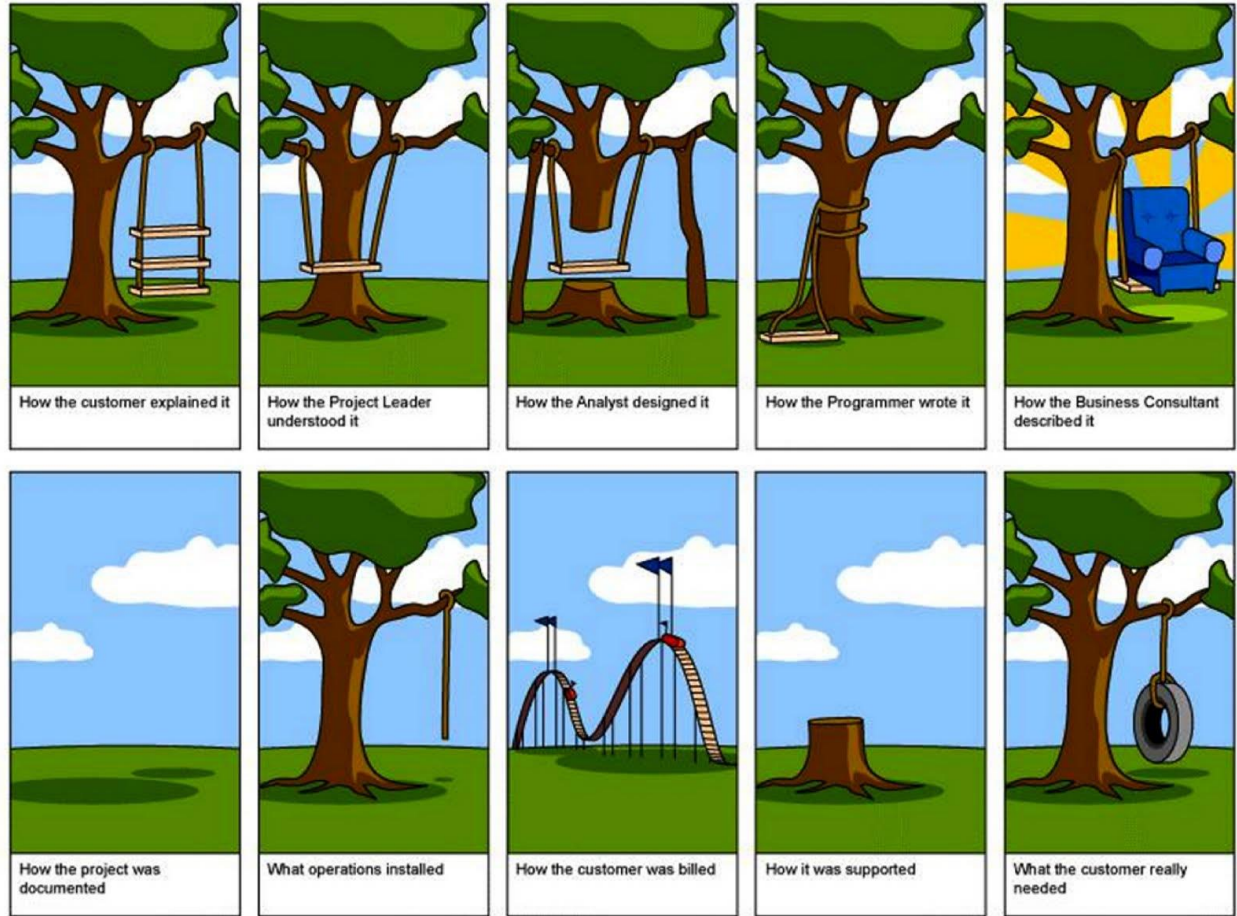


Agile



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

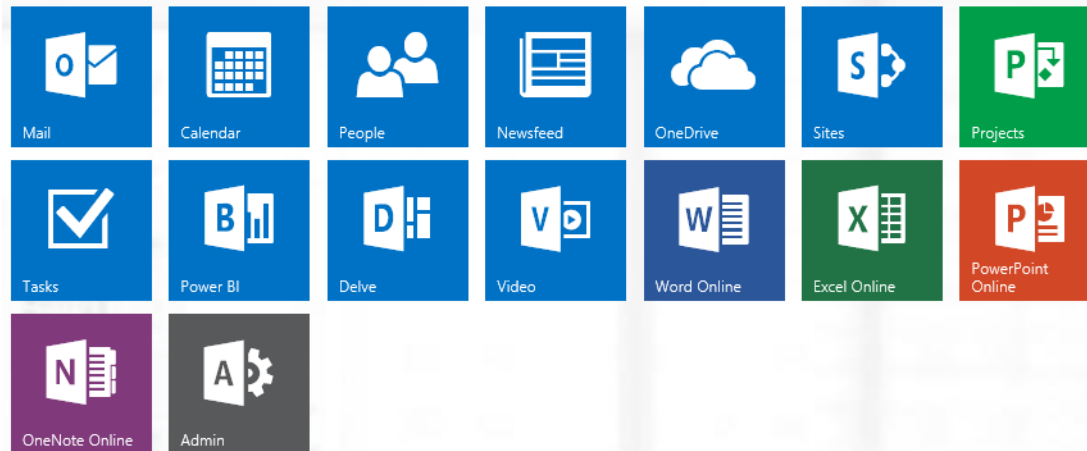
How do you use SharePoint today?

- 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

Office 365 Planner

The top screenshot displays the 'Marketing Campaign' plan in a hub view. It features several task cards: 'Campaign Budget' (a bar chart), 'BingAds' (a video thumbnail), 'Launch Event' (a photo), 'Positioning Framework' (a line chart), 'The Morning Show' (a video thumbnail), 'Magazine Coverage' (a video thumbnail), 'Twitter Feed' (a social media post), 'European Tour' (a map), and 'Updated Logo' (a document icon). The bottom screenshot shows the 'Board' view for the same campaign. It includes a donut chart indicating '60 days left' and '13 tasks left'. A legend shows task status: 7 Not started, 3 Late, 3 In progress, and 0 Completed. A horizontal bar chart shows task progress by assignee: Unassigned (2), Alex Darrow (1), Bonnie Kearney (2), Fabrice Canal (2), Garret Vargas (3, with a callout 'Late: 2'), and Sara Devis (2). A task details pane for Garret Vargas is open on the right, showing a search bar and a list of tasks with due dates: '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

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

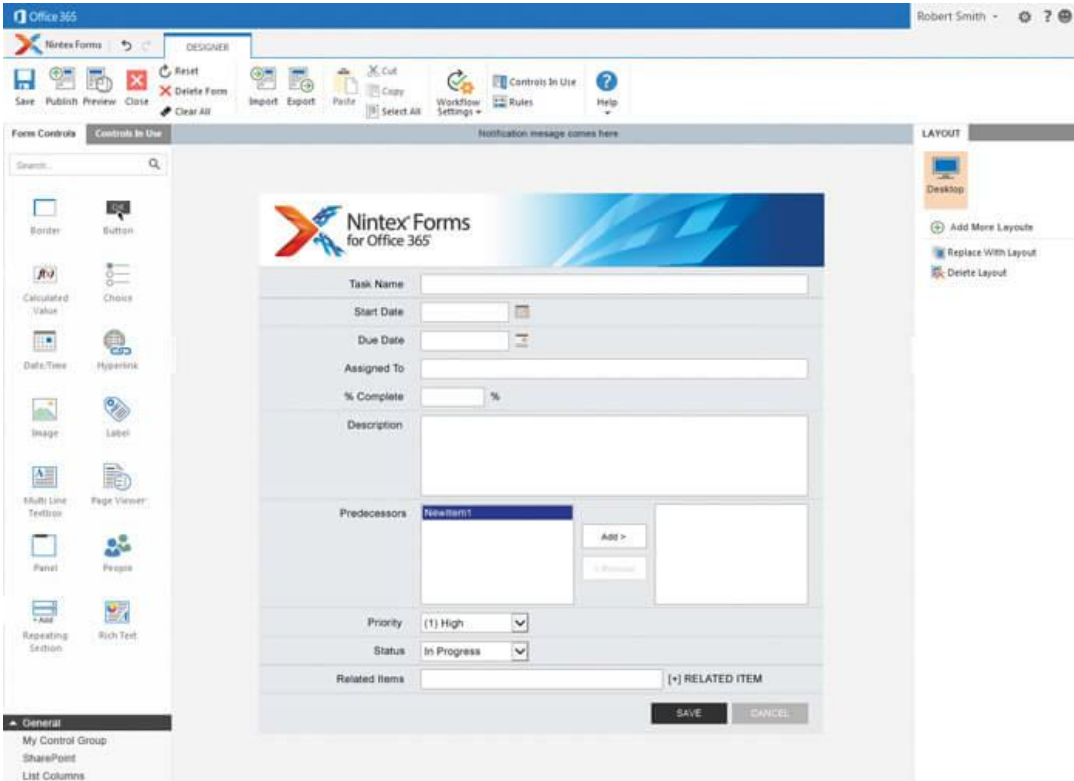
Automating the Process

- 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

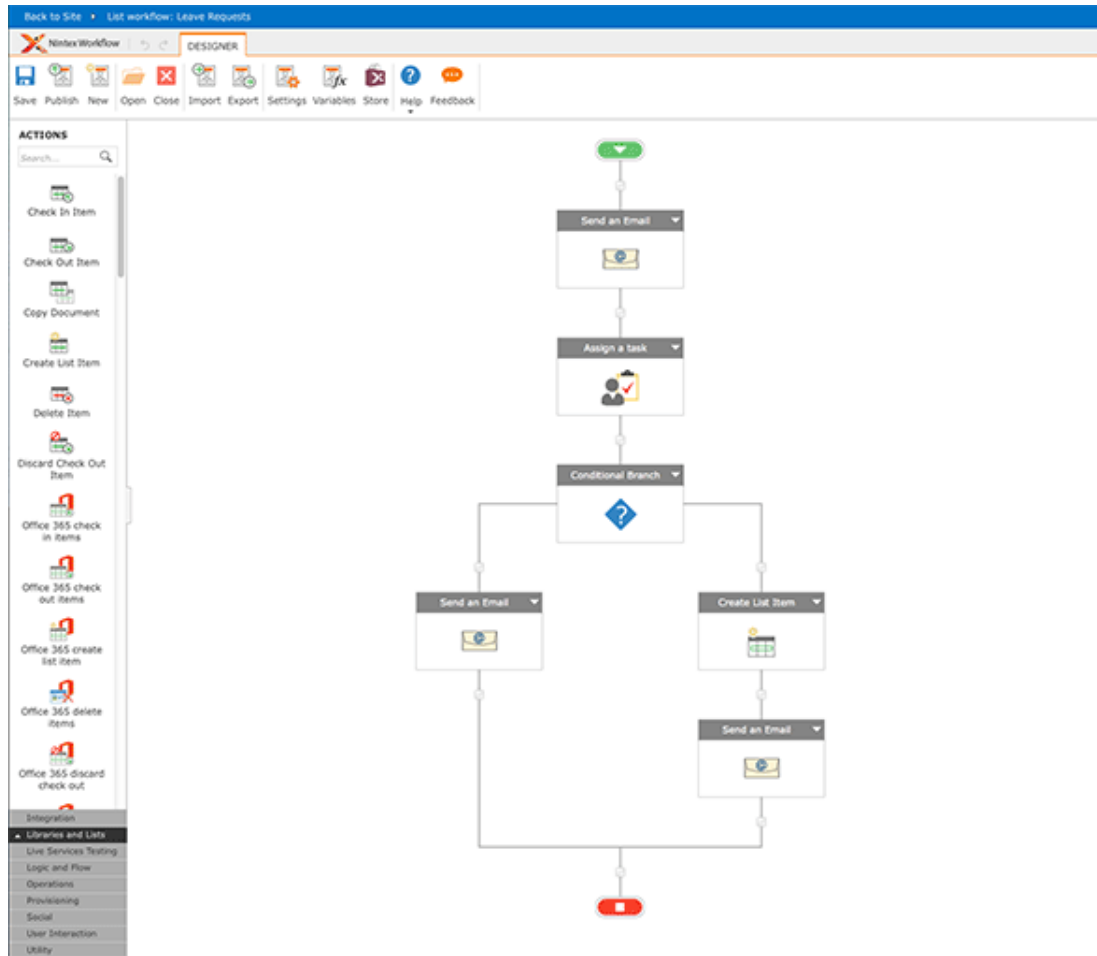
Nintex Forms



- 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

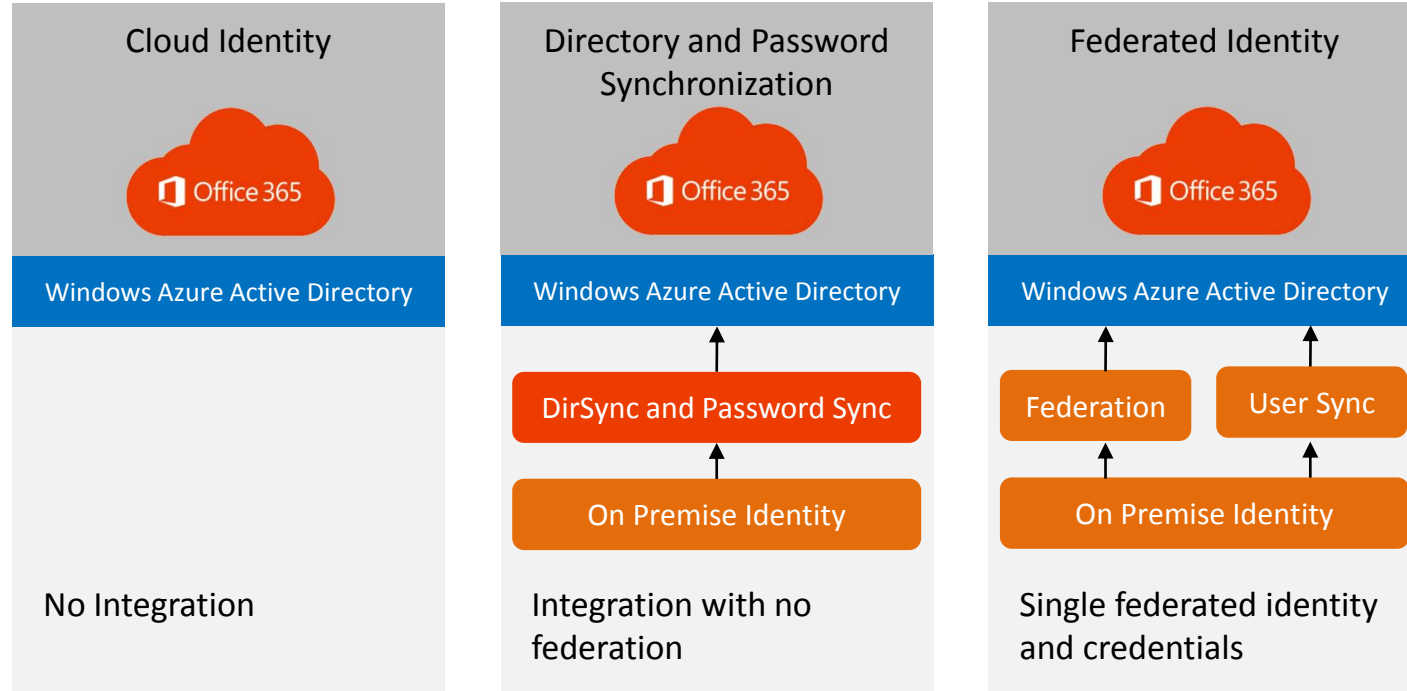
- Members
- Customers
- Vendors
- Suppliers
- Volunteers
- Board of Directors
- Citizens
- Researchers
- Tenants
- Partners

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

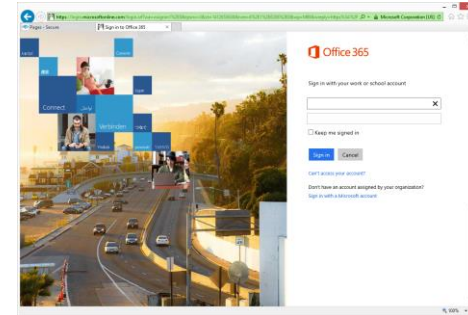


Authentication for External Users

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

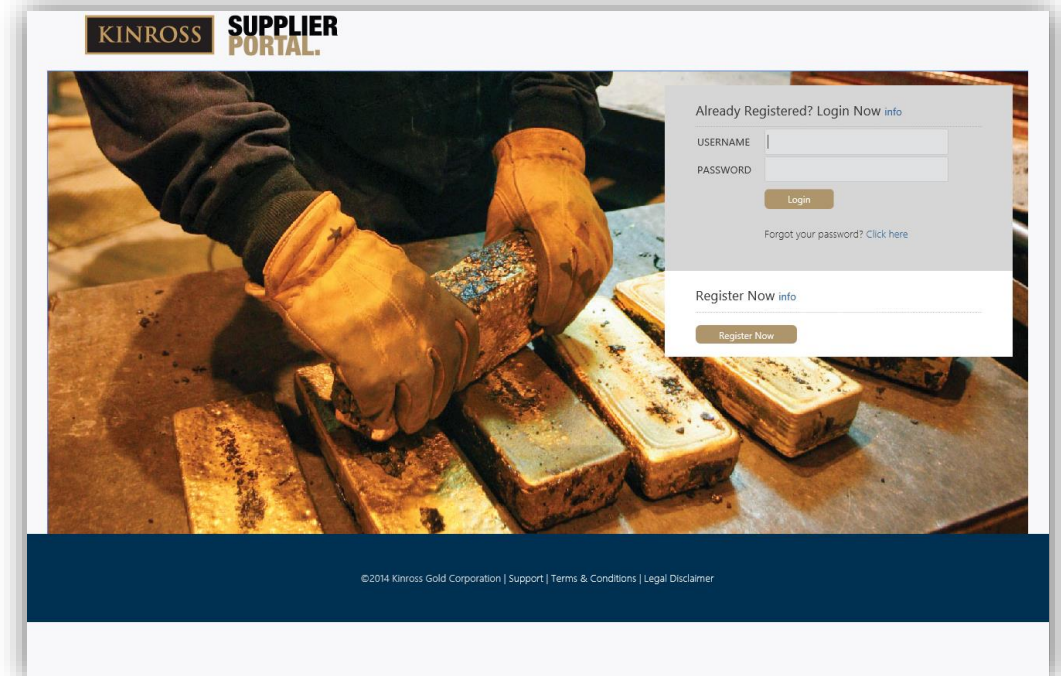
Office 365 External Sharing

- 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



Questions?