

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

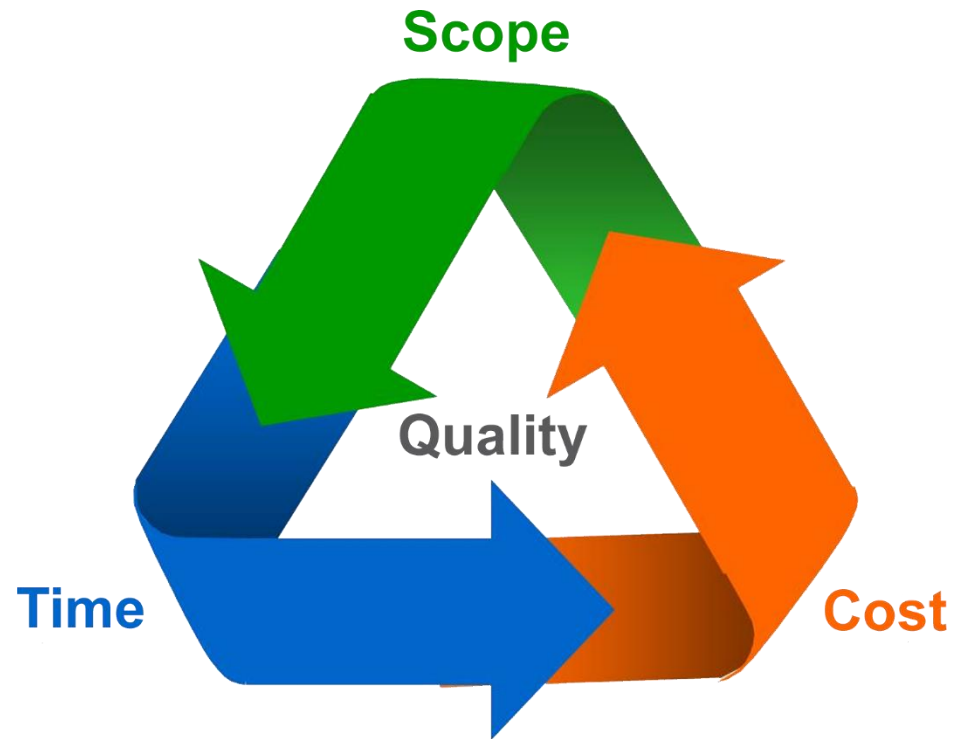
- On time and on budget
- Return on investment
- Aligned with strategic goals and objectives
- Quality
- Business Value

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>

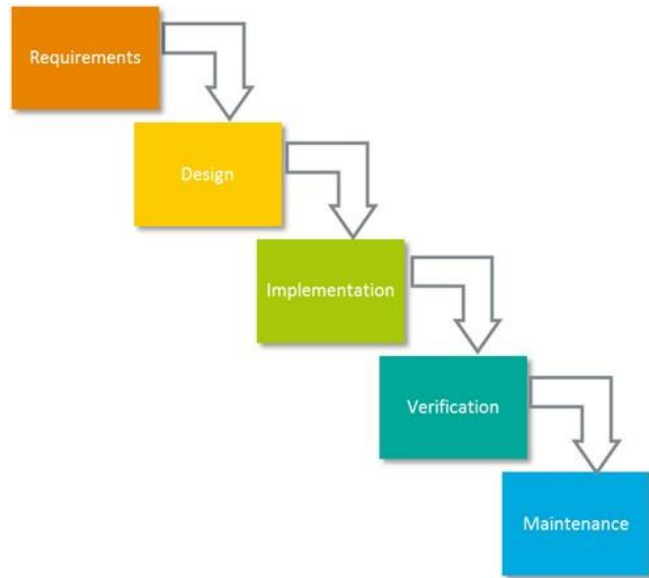
Project Management Triangle



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

Methodologies

Waterfall

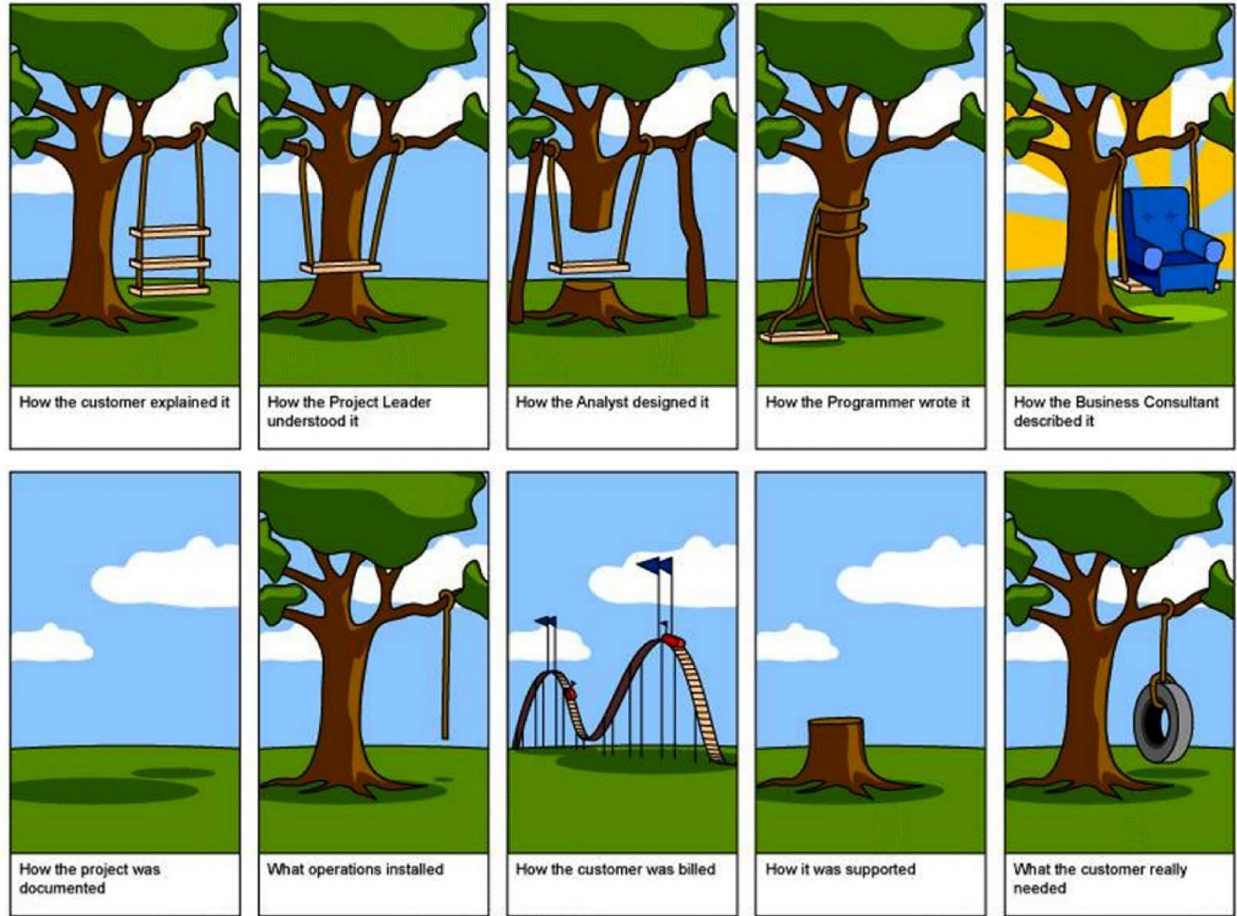


Agile



Hybrid combining elements of both

Communications



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

Communication Methods

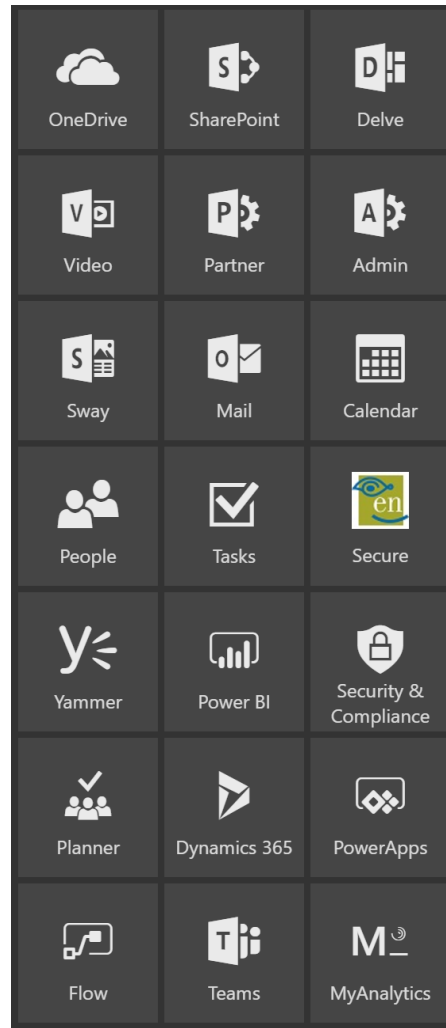
Traditional

- 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

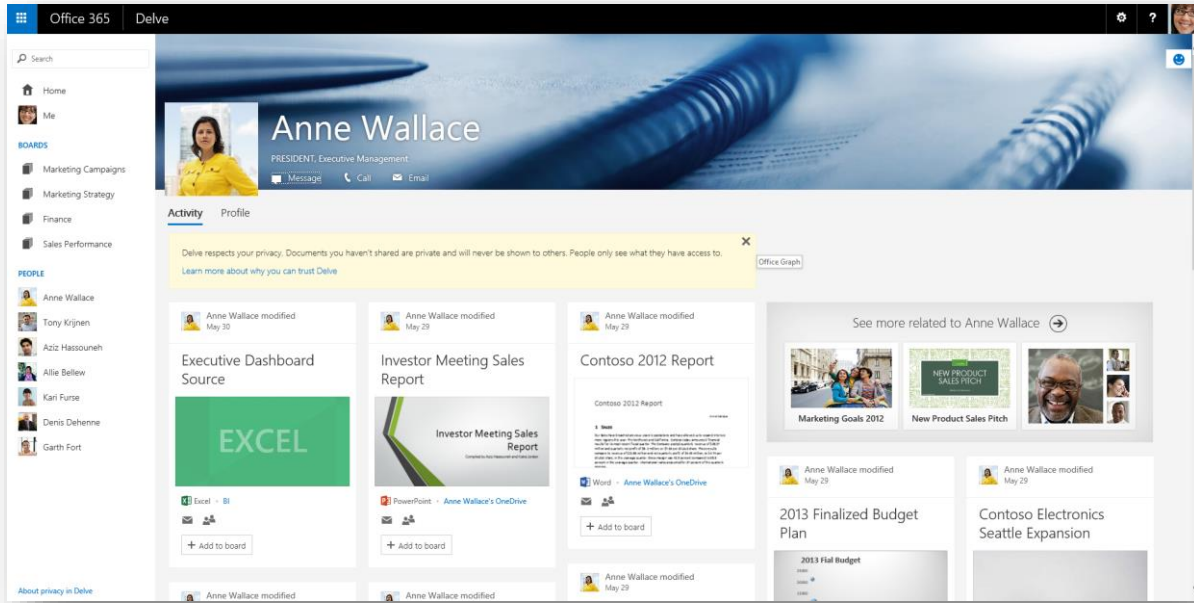
The top screenshot shows the 'Marketing Campaign' plan in the Office 365 Planner. It features a central board with several task cards: 'Campaign Budget' (a bar chart), 'BingAds' (a document icon), 'Launch Event' (a photo of a stage), 'Positioning Framework' (a line graph), 'The Morning Show' (a video thumbnail), 'Magazine Coverage' (a newspaper thumbnail), 'Twitter Feed' (a social media feed), 'European Tour' (a map), and 'Updated Logo' (a document icon). The bottom screenshot shows the same campaign in 'Board' view. 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 Canal, Garret Vargas (Late: 2), and Sara Devis. A task card for Garret Vargas is expanded, 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

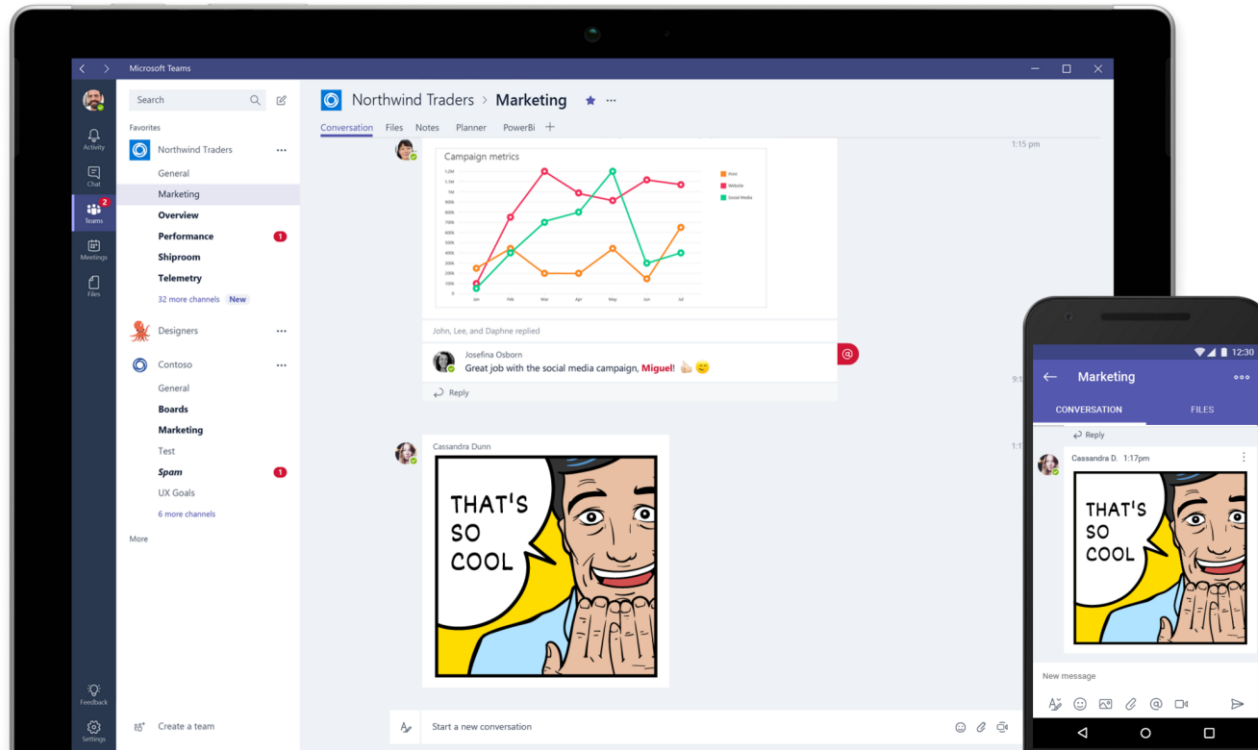


Delve



- 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

The Associated Engineering Story



The Client – Associated Engineering

Award-
winning
consulting
firm

Established
in
Edmonton
70 years ago

900 staff &
21 offices
across
Canada

The Client – Associated Engineering II

Planning

Studies

Assessments

Design

Construction

Training

Operational
Assistance

The Challenge

Work with multiple external parties on projects of various sizes

Efficient collaboration & communication is key

The Challenge

SharePoint Pilot quickly became production

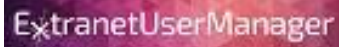
Lack of high-availability and disaster recovery became significant risk

The Solution



Office 365 Platform

- AE was already an O365 customer, SharePoint online chosen to provide high availability and disaster recovery capabilities



Extranet User Manager

- Delegation of management of partners' external users through Azure B2B
- Automation of site creation, group creation and permissions as part of project request form and workflow



Migration & Single sign-on

- Assistance with Migration of existing sites using Sharegate
- Investigation of SSO into O365 through MS AD FS

The Results

High-availability & Disaster Recovery

- Provide by Microsoft
- Backed by financial SLA

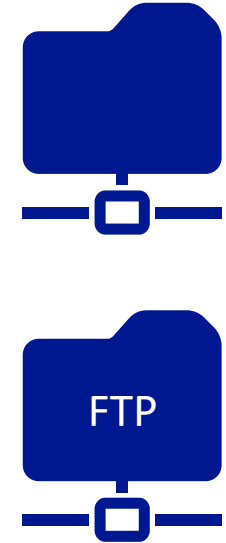
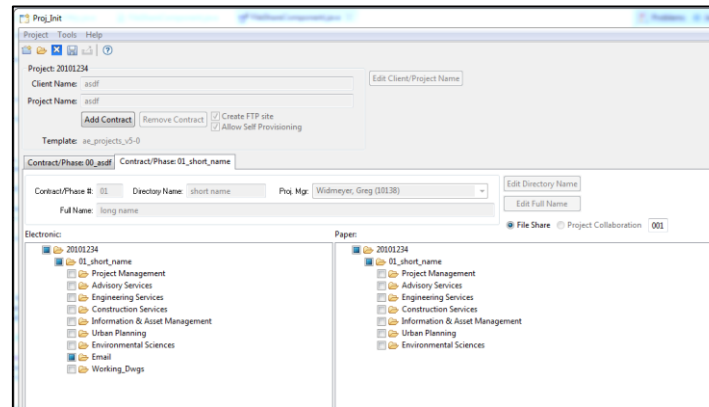
Project Site Creation

- Self-service project site creation
- External invitations

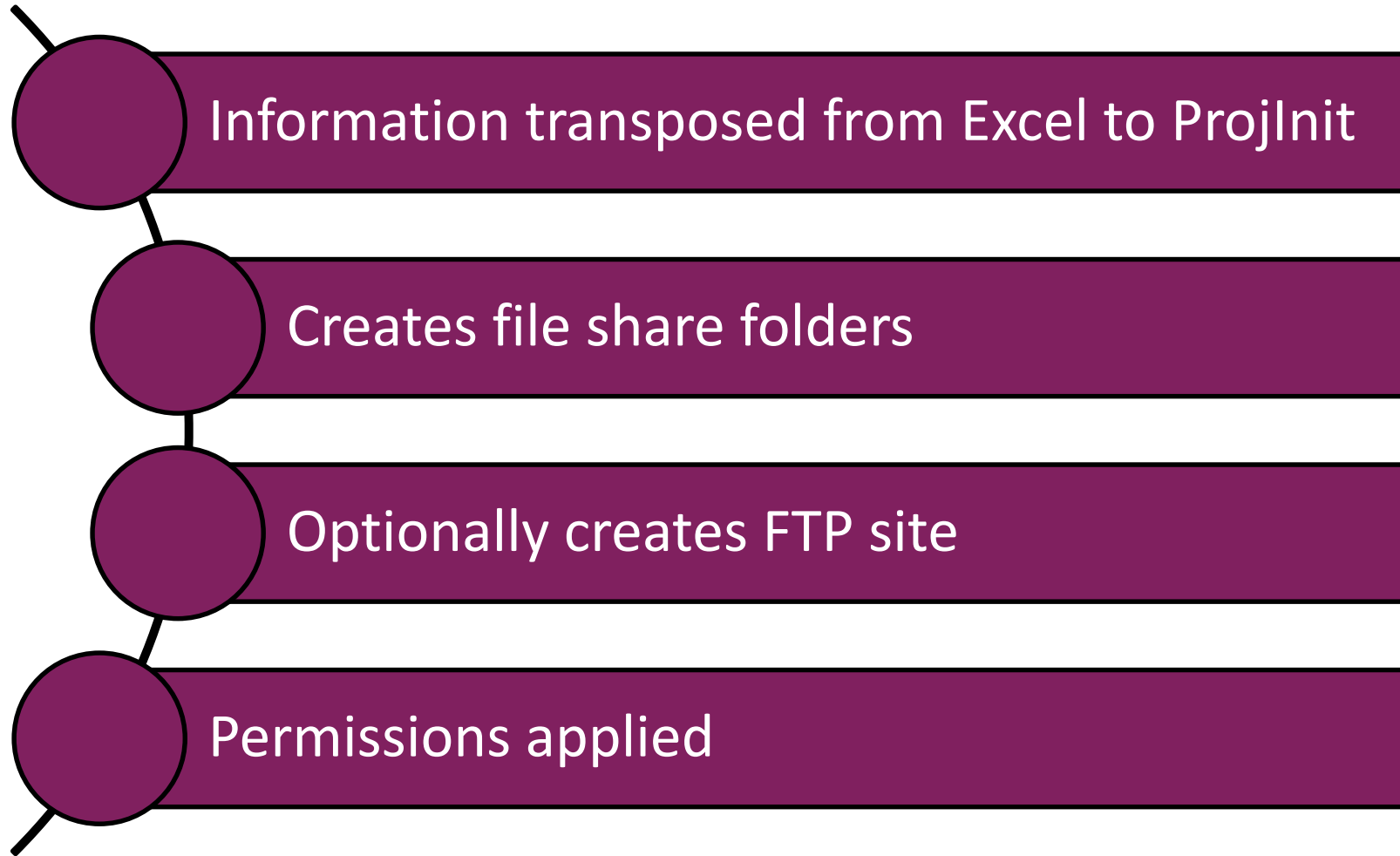
Subscriptions & Login

- O365 subscriptions for external partners not required – connect with their own O365 or Azure AD credentials
- Azure AD manages login process, EUM sends initial invitations & manages group membership and permissions.

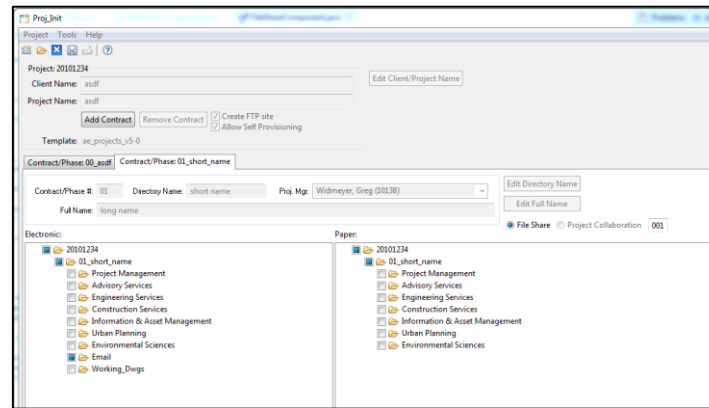
Legacy Process



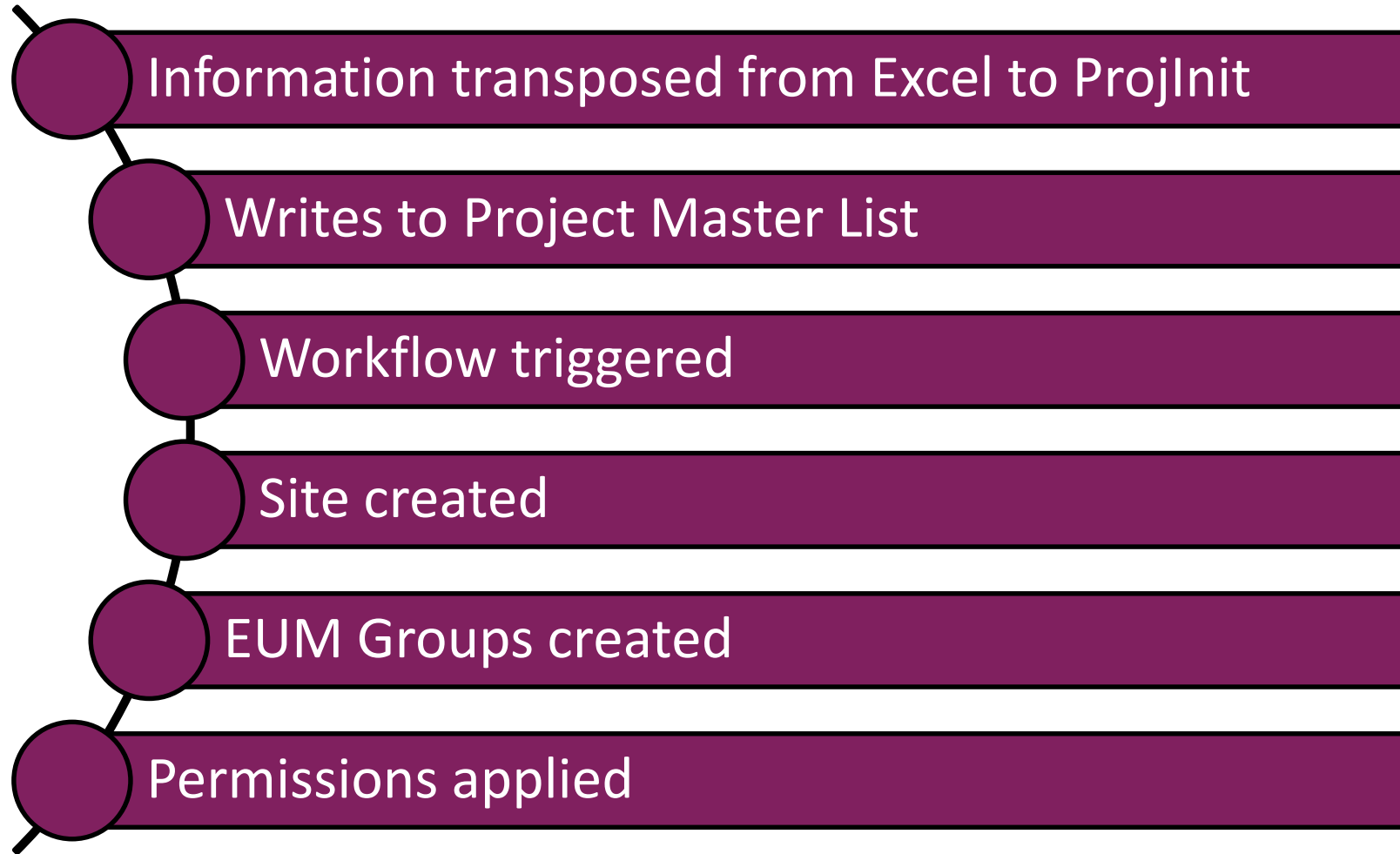
Legacy Process



New Process



New Process



SharePoint Designer Workflow

The screenshot displays the SharePoint Designer Workflow editor interface. The top ribbon includes tabs for FILE and WORKFLOW, with various action icons such as Save, Publish, Check for Errors, Paste, Copy, Format Painter, Move Up, Move Down, Delete, Condition, Action, Stage, Step, Loop, Parallel Block, App Step, Else Branch, Views, Export to Visio, Workflow Settings, Management, Initiation Form Parameters, and Local Variables.

The left-hand navigation pane shows the 'Workflows' section expanded, with 'Create Project Site' selected. The main workspace is titled 'Stage: Working' and contains the following workflow steps:

- Set Workflow Status to Working
- then Set Variable: RequestURL to <https://aeeumdev.envisionit.com/SiteP...>
- then Set Variable: ClientSecret to
- then Set Variable: SiteURL to [%Current Item:SiteId%] [%Current Item...
- then Set Variable: Title to Current Item:ProjectLongName
- then Set Variable: OwnerEmail to Current Item:ProjectManagerEmail
- then Set Variable: BaseTemplate to PROJECTSITE#0
- If Current Item:TemplateID equals 1
 - Set Variable: PnPTemplate to <File-Sharing-Site-Template-Template.xml>
- Else
 - Set Variable: PnPTemplate to <Project-Site-Templates-Development.xml>
- then Set Variable: LCID to 1033
- then Set Variable: TimeZoneID to 12
- then Set Variable: SiteCollectionAdministrator to Current Item:ProjectManagerEmail
- then Build [...] Dictionary (Output to Variable: requestHeaders)
- then Build [...] Dictionary (Output to Variable: siteParameters)
- then Set Variable: ProjectSiteURL to <https://ae46.sharepoint.com/sites/%V...>
- then Set Variable: SiteLinkURL to [%Variable: ProjectSiteURL%] [%Curre...
- then Update item in Current Item
- then Call [%Variable: RequestURL%] HTTP web service with Variable: siteParameters (ResponseContent to Variable: responseContent |ResponseHeaders to Variable: responseHeaders |ResponseStatusCode to Variable: responseCode)
- then Set Workflow Status to Complete

Transition to stage
Go to End of Workflow

New Solution: Portal Listing

The screenshot shows an Office 365 portal interface. At the top, there is a green header with the Office 365 logo and the user name 'Michelle Tarrant'. Below the header, there is a navigation bar with 'BROWSE', 'PAGE', 'FILES', and 'LIBRARY' tabs. The main content area is titled 'Associated Engineering Portal' and 'AE Portal Listing'. On the left, there is a sidebar with navigation links: 'Co-Authoring Library', 'Project Collaboration Sites', 'Reports', 'Support Documents', and 'Teams Start'. The main content area is divided into two columns. The left column is titled 'Co-Authoring Library' and contains a table with columns for 'Name', 'Project Name', and 'Project Website Contact'. The right column is titled 'Project Collaboration Sites' and contains a table with columns for 'Edit', 'Project Number', 'Project Web Site-Main', 'Alternate Site Links', and 'Project Website Contact'. Both tables list various operations for different Associated Engineering entities.

Operation	Count
Operation : Associated Engineering Alberta Ltd.	26
Operation : Associated Engineering British Columbia Ltd.	5
Operation : Associated Engineering Group Ltd.	4
Operation : Associated Engineering Ontario Ltd.	2
Operation : Associated Engineering Saskatchewan Ltd.	5
Operation : Associated Environmental Ltd.	3

Operation	Count
Operation : Associated Engineering Alberta Ltd.	11
Operation : Associated Engineering British Columbia Ltd.	7
Operation : Associated Engineering Group Ltd.	1
Operation : Associated Engineering Ontario Ltd.	9
Operation : Associated Engineering Saskatchewan Ltd.	7

New Solution: Co-authoring Library

The screenshot displays the Office 365 interface for a Co-Authoring Library. The top navigation bar includes 'Office 365', a notification bell, settings, help, and the user name 'Michelle Tarrant'. Below this, the 'LIBRARY' tab is active, showing the 'Associated Engineering Portal' and 'Co-Authoring Library' for project ID '20133936000'. A search bar is present in the top right.

On the left, a navigation pane lists: Co-Authoring Library, Project Collaboration Sites, Reports, Support Documents, and Teams Start. The main content area shows project details for '20133936000' with the description 'Inputs into next phase of client engagement'. A 'Client Logo' section features the 'Calgary' logo and the University of Calgary crest. Project metadata includes: Project Name: Calgary Flood Protection, Project Number: 20133936000, Project End Date: 12/31/2017, and Project Website Contact: Nadeer Lalji. Links for 'View All Properties' and 'Edit Properties' are provided.

Below the details, a toolbar offers 'New', 'Upload', 'Sync', 'Share', and 'More' options. A search box labeled 'Find a file' is also present. A table lists the files in the library:

✓	Name	Title	Version	Modified	Modified By	Check In Comment
	prs_CSCE_Calgary_River_Flood-NL-2017-05-0816	... Evaluating the Merits of Barrier Flood Mitigation in a Developed Setting	0.2	5/17/2017 8:35 AM	Nadeer Lalji	

A 'Drag files here to upload' instruction is located at the bottom of the file list area.

New Solution: South LRT Extension

South LRT Extension (Century Park to Ellerslie) AE Portal


South LRT Extension (Century Park to Ellerslie)

Project Manager: Division Manager, Transportation
Kent Eklund

Assistant Project Manager: Manager, Roadways
Eben Kruger

Site Administrator: Document Control Representative
Sheila Blouin

Partners:




Project Announcements

Welcome to the Shared Workspace for this project! 5/21/2017 2:06 PM
by Michelle Tarrant - Admin

A central location for project information to be leveraged by all members of the project team. You will see what you have access to, can set alert notifications to be made aware of new or modified content on this site via email, and it is drag and drop...


Key Images



Train Bridge

Project Contacts

First Name	Last Name	Business Phone	Email Address
Company : Associated Engineering (4)			
Company : IBI (1)			
Company : Kinnikinnick Studios (1)			
Company : McElhanney (1)			
Company : OPUS (1)			
Company : Platinum Engineering (1)			



The diagram shows Capital Line Partners at the center, surrounded by six partner logos and their respective roles:

- Associated Engineering:** PROJECT MANAGEMENT, ENVIRONMENTAL, CIVIL, STRUCTURAL
- OPUS:** PROJECT MANAGEMENT, CIVIL, RAIL, SURVEY
- McElhanney:** PROJECT MANAGEMENT, PLANNING/ CONCEPT, REVIEW, CIVIL
- IBI:** PROJECT MANAGEMENT, SUSTAINABLE URBAN INTEGRATION, O&M
- PLATINUM ENGINEERING LTD.:** DESIGN & SYSTEMS INTEGRATION, OPERATIONS AND MAINTENANCE, MEP
- Stakeholder Engagement Communications:** STAKEHOLDER ENGAGEMENT, COMMUNICATIONS

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>



PnP Provisioning Engine

Part of the SharePoint PnP initiative deliverables

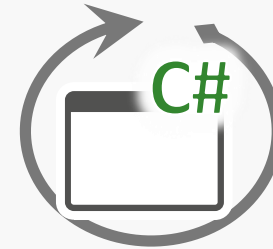
- Open source, community-driven

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

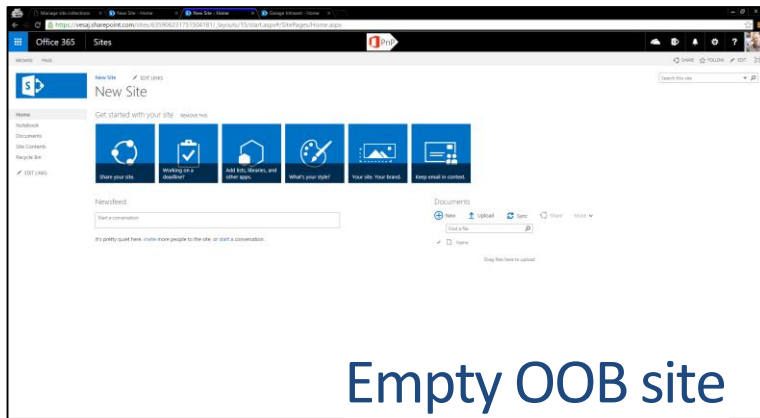


OpenXML based template with configuration and assets, like images or theme definitions

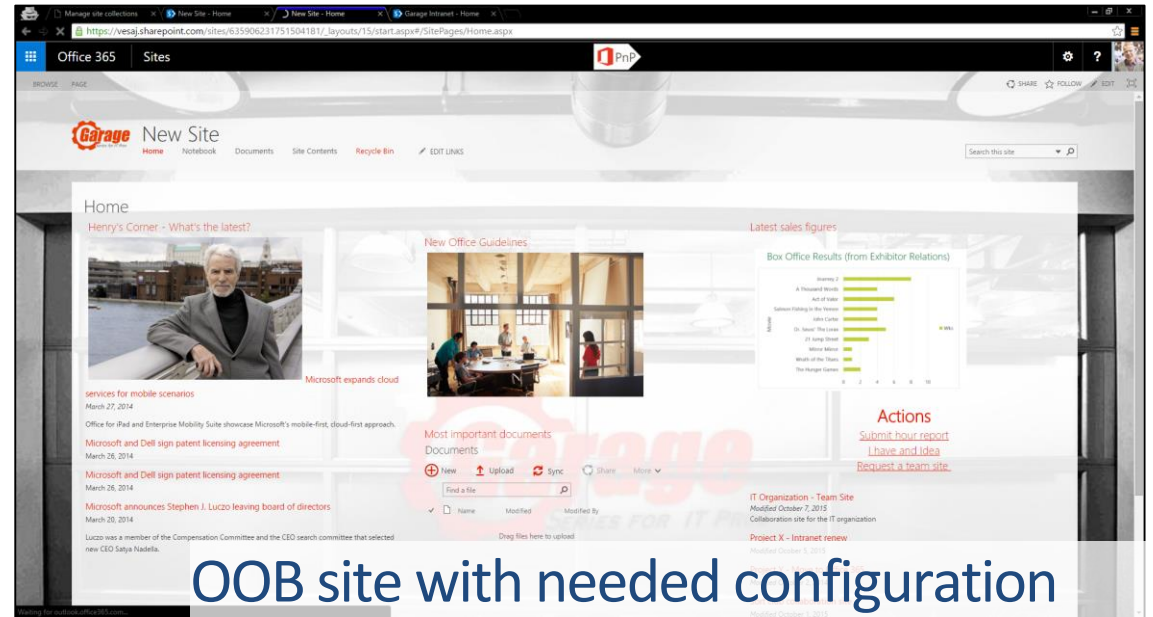
PnP Provisioning Engine – Export/Import



Template site

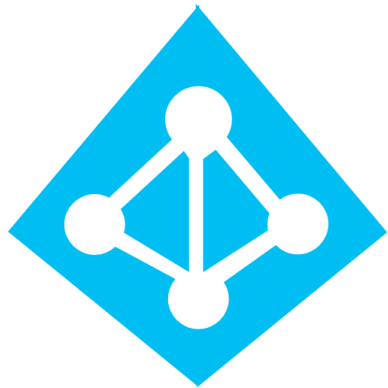


Empty OOB site



OOB site with needed configuration

Azure AD B2B and Office 365



- Partner users can be granted access to any part of your SharePoint Online
- Considered external users by Microsoft
- No Office 365 subscription is required for the partner users
- Permissions in SharePoint Online can be applied to Azure AD groups
- Site owners can manage the Azure AD group membership through EUM

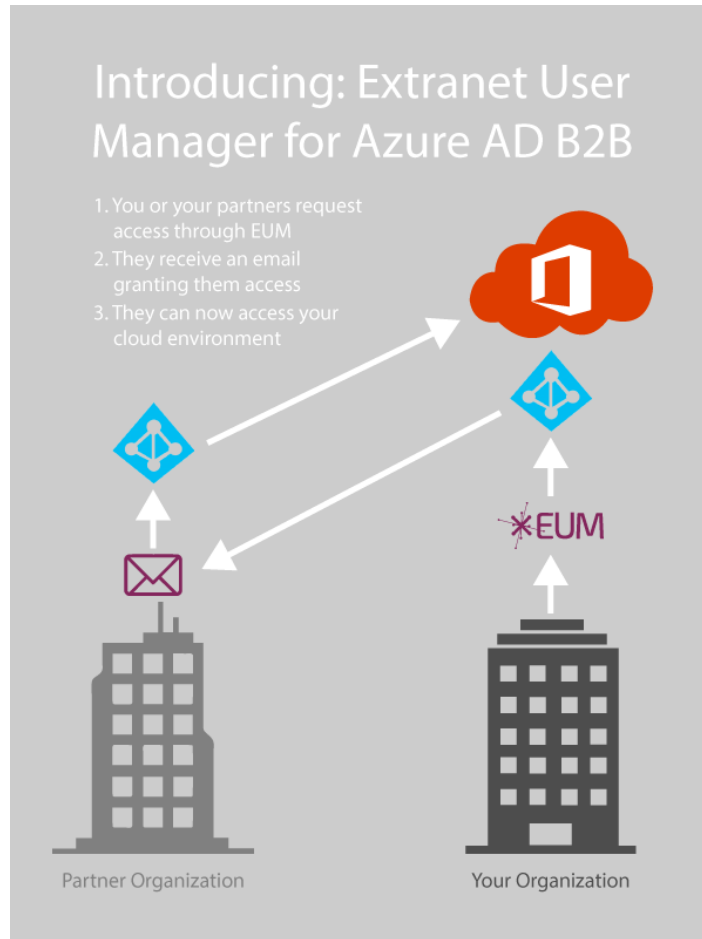
B2B Experiences

User Type	Experience
Existing Office 365 or Azure AD user	Logs in with their Azure AD credentials to accept the invitation
Business email not in Azure AD	Azure AD tenant is created behind the scenes User creates a password Can provide their name and country Azure AD manages the password reset requirements Tenant can be converted to a fully managed Azure AD tenant later
Consumer email (Gmail, Hotmail, etc.)	Account is converted to a Microsoft account in the background

Azure B2B Current Limitations

- Delegation of user management is supported, but it is all or nothing
 - No way to restrict access to users in a group
- Managed through the Azure portal
 - Can be overwhelming for business users
- No self-registration or approval process
- No integration to other line of business systems
 - Profile management, CRM integration, account verification
- No integration to on premises AD
 - This can be used with Azure Application Proxy to provide access to on premise systems through B2B single sign on

EUM and Azure B2B



- EUM provides the self-registration, profile management, and delegation
- As users and groups are created by the business owners, they are setup in Azure AD by EUM
- EUM sends the invitations
- Azure AD manages the login process
- EUM manages the group membership leveraged for permissions

Wrap-Up Points

- Office 365 Groups are a great way to manage projects
 - SharePoint, conversations, calendar, OneNote, Skype, Planner, Delve
- You don't need to start with everything, choose what makes sense for your organization
- Be prepared for change, Office 365 is changing quickly
- 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

Questions?