Collaborating and sharing content with external stakeholders

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Today’s presenters

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## Agenda

- Usage scenarios for external collaboration
- Deployment options
- Core and complementary technologies
- Key considerations
- Q&A
Usage scenarios for external collaboration
Usage scenarios

Collaborate/Share model

Publish/Consume model

Specialized cases
<table>
<thead>
<tr>
<th>Scenarios we won’t focus on today</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Shared/published calendars with Exchange</td>
</tr>
<tr>
<td>• Voice/video/IM/desktop sharing via lync (aka skype for business) federation</td>
</tr>
<tr>
<td>• External-facing communities with Yammer</td>
</tr>
</tbody>
</table>
Stop doing this!
Usage scenarios - Publish/consume model
Usage scenarios - Publish/consume model

- Client portals
Usage scenarios - Publish/consume model

- Client portals
- Member portals
Usage scenarios - Publish/consume model

- Client portals
- Member portals
- BOD portals
Usage scenarios - Publish/consume model

- Client portals
- Member portals
- BOD portals
- Partner portals
Usage scenarios - Publish/consume model

- Client portals
- Member portals
- BOD portals
- Partner portals
- 3PL/manufacturer portals
Case study – BOD portals

SharePoint Board of Directors Site

Publish Board Packet to iPad application

Organize all Board Meetings and Packet information using SharePoint Sites and Document Libraries
Case Study – Investor portals
Documents are organized with MetaData for filtering

Targeted messaging to You and to all Fund Investors
Usage scenarios - Collaborate/share model

- Project team collaboration
  - Many authors, many consumers
  - Less-structured file sharing
Usage scenarios - Collaborate/share model

- Project team collaboration
- Contact review

- Many authors, many consumers
- Less-structured file sharing
Usage scenarios - Collaborate/share model

- Project team collaboration
- Contact review
- Creative content review

- Many authors, many consumers
- Less-structured file sharing
Usage scenarios - Collaborate/share model

- Project team collaboration
- Contact review
- Creative content review
- Accounting work paper review

- Many authors, many consumers
- Less-structured file sharing
Usage scenarios – Specialized cases

- Large binaries
  - CAD files
  - Rich media
- Code (source + compiled)
- Databases

- Many authors, many consumers
- Specialized file formats
- Avoiding e-mailing around large files
Deployment options
### Deployment options

- On premises
- In the cloud
- Other hosted options
On premises

- AD credentials to authenticate to internal site
- Separate SharePoint Farm located in the DMZ
In the cloud

- External users are granted access to SharePoint (Office 365)
- Activating the external sharing feature
- Control sharing at the following levels:
  - Globally
  - Site collections
  - Sites and documents with authenticated users
  - Sites and documents with guest users
In the cloud

Office 365

Site Collection

Site

List

Library

SharePoint Online

Site Collection

Site

List

Library

Document

Document

Document

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### Other deployment options

- **Hosted cloud**
  - SharePoint Farm separate from your organizations intranet
  - Utilize IaaS such as:
    - Azure
    - McGladrey IaaS

- **Hybrid**
  - SharePoint on-premises farm and a subscription to a SharePoint Online service
Core and complementary technologies
## Other cloud-based file-sharing

<table>
<thead>
<tr>
<th>Publish/Consume</th>
<th>Collaborate/Share</th>
<th>Special Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>SharePoint</td>
<td>OneDrive for Business</td>
<td>panzura</td>
</tr>
<tr>
<td>SharePoint Online</td>
<td>Office 365 Groups</td>
<td>nasuni</td>
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<td></td>
<td>box</td>
<td>EGNYTE</td>
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<tr>
<td></td>
<td>Dropbox</td>
<td>docassist</td>
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<td></td>
<td>OneDrive</td>
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This just in...

- DropBox integration with Office 365 – November 2014
- Cloud Storage Partner Program for native cloud storage integration with Office 365 – February 2015
Key considerations and takeaways
Three key considerations

- Governance
- Mobility
- Security
<table>
<thead>
<tr>
<th>Initially</th>
<th>Weekly</th>
<th>Monthly</th>
<th>Annually</th>
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<tbody>
<tr>
<td>- Create separate site collections</td>
<td>- Review site usage reports</td>
<td>- Review user profiles and sharing</td>
<td>- Perform penetration testing</td>
</tr>
<tr>
<td>- Plans for:</td>
<td>- Manage users -</td>
<td>- Review data and sharing across all external sites</td>
<td>- Review governance policies</td>
</tr>
<tr>
<td>User</td>
<td>provisioning &amp;</td>
<td>- Training for new/existing users on external collaboration policies and</td>
<td>- Confirm need/relevance of all external</td>
</tr>
<tr>
<td>Management</td>
<td>decommissioning</td>
<td>technology.</td>
<td>collaboration sites</td>
</tr>
<tr>
<td>Document Control</td>
<td></td>
<td>- Audit of data – viewing, printing, and emailing</td>
<td></td>
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<tr>
<td>Training</td>
<td>accounts</td>
<td>- Confirm need/relevance of all external collaboration sites</td>
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<tr>
<td></td>
<td>Retention schedule</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Review search reports</td>
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<td></td>
<td>Review crawl logs</td>
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## Mobility

- **SharePoint online – Activate mobile view**
- **Contemporary view to render sites in HTML5**
  - Works with the most recent mobile IE, Safari and Android browsers
- **Products**
  - Harmon - i.e. Mobile - iOS, Android, and BlackBerry 10
  - Colligo engage for mobility - Apps for iOS, Windows, Mac
Security

- Edge security and anti-virus
- Encryption (at rest and in transit)
- Information rights management
Microsoft rights management

Client integration

User Authentication

Windows Server Rights Management

Mobile endpoints

Integration

Office 365

Authentication and collaboration

Integration

Microsoft Azure Rights Management Services

BYO Key

Microsoft Azure Active Directory

Mobile endpoints

Client integration

Connectors

Windows Server Active Directory

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## Resources and next steps

<table>
<thead>
<tr>
<th>Resource</th>
<th>Link</th>
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<tr>
<td>IGNITE Conference: “What sharing technology to use for what scenario” – Richard Harbridge, Microsoft</td>
<td>N/A – watch for the IGNITE schedule!</td>
</tr>
<tr>
<td>Your local SharePoint Saturday events</td>
<td><a href="http://www.spsevents.org">http://www.spsevents.org</a></td>
</tr>
<tr>
<td>McGladrey Rapid Assessment: Are you optimized for external collaboration?</td>
<td>Learn more here</td>
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Check out our [Enterprise Content Management](#) blog
Q&A
## Contact information

<table>
<thead>
<tr>
<th>Photo</th>
<th>Name</th>
<th>Title</th>
<th>Email</th>
<th>Twitter</th>
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<td><img src="image1" alt="Marla Matlock" /></td>
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<tr>
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