Is SharePoint in the Cloud right for you?
McGladrey overview

Fifth largest U.S. provider of assurance, tax and consulting services

- Over $1.28 billion in revenue
- 75 offices and 6,500 employees in the United States
- Internationally*
  - Presence in 90 countries
  - More than 32,000 people in over 700 offices
  - $3.9 billion in worldwide revenues

* Member of the RSM International network of independent accounting, tax and consulting firms.
Presenters on Today’s Webcast

Mike Gilronan is the SharePoint Practice Director in the Northeast region at McGladrey.

20+ years consulting and professional services experience including ERP and CRM, collaboration and KM, business analysis, training, project and practice management.

John Mongell is a technology consulting services manager in the Northeast region at McGladrey.

20 years of experience in designing and developing Enterprise Content Management (ECM) software solutions.
Agenda

- SharePoint architecture and terminology
- Options for buying SharePoint Online and Office 365
- On premises vs. in the cloud vs. hybrid
- Security and permissions best practices
- Key SharePoint features
- Introducing OneDrive for business
- Next steps
- Q&A
Polling Question

- How have you deployed SharePoint today?
  A. On premises
  B. In the cloud
  C. Both
  D. Neither/Don’t know
SharePoint Architecture and Terminology
## Terminology

<table>
<thead>
<tr>
<th>A what?</th>
<th>Oh that!</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>Accounts (people, service application accounts)</td>
</tr>
<tr>
<td>Authentication</td>
<td>Confirmation of the truth. The claims provider.</td>
</tr>
<tr>
<td>Server farm</td>
<td>All the Windows Servers that work with SharePoint. (The Cloud, Active Directory, local file systems, local LOB data)</td>
</tr>
<tr>
<td>Services</td>
<td>Web service application (search, OneDrive synchronization, workflow)</td>
</tr>
<tr>
<td>Site collections</td>
<td>Whole bunch of sites grouped by a URL</td>
</tr>
<tr>
<td>Site</td>
<td>Single web</td>
</tr>
<tr>
<td>Content databases</td>
<td>Holds all content added to SharePoint</td>
</tr>
<tr>
<td>Zones and URLs</td>
<td>Isolated URLs for a single site (ie: portal.sharepoint.com vs my.sharepoint.com)</td>
</tr>
</tbody>
</table>
What is a site collection?

- MyCompany.sharepoint.com
- MyCompany.sharepoint.com\finance
- MyCompany.sharepoint.com\Finance\reporting
- MyCompany.sharepoint.com\HR
What is inside a site collection?

- Webs
- Templates
- Language
- Security
- Navigation
- Web pages
- Site layouts
- Themes
- Regional settings
- Search
- Content types
- Workflows
- Apps
Options for buying SharePoint Online and Office 365
## SharePoint online service options

<table>
<thead>
<tr>
<th>Office 365 Service</th>
<th>Plans for SharePoint Only</th>
</tr>
</thead>
</table>
| ![SharePoint Online](image) | SharePoint Online Plan 1  
SharePoint Online Plan 2 |

- Key differences between Office 365 options
  - Plan 1: Does not have full search experience, search web parts, compliance features
  - Plan 1 & Plan 2: Will not allow external sharing or BI capabilities with scorecards and dashboards
## O365 Service Suites

<table>
<thead>
<tr>
<th>Office 365 Service Family</th>
<th>Plans</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small Business (Maximum 25 users)</td>
<td>Office 365 Small Business</td>
</tr>
<tr>
<td></td>
<td>Office 365 Small Business Premium</td>
</tr>
<tr>
<td>Midsize (Maximum 300 users)</td>
<td>Office 365 Midsize Business</td>
</tr>
<tr>
<td>Enterprise (Unlimited # of users)</td>
<td>Office 365 Enterprise E1</td>
</tr>
<tr>
<td></td>
<td>Office 365 Enterprise E3</td>
</tr>
<tr>
<td></td>
<td>Office 365 Enterprise E4</td>
</tr>
<tr>
<td></td>
<td>Office 365 Enterprise K1</td>
</tr>
<tr>
<td>Education (Unlimited # of users)</td>
<td>Office 365 Education A2</td>
</tr>
<tr>
<td></td>
<td>Office 365 Education A3</td>
</tr>
<tr>
<td></td>
<td>Office 365 Education A4</td>
</tr>
<tr>
<td>Government (Unlimited # of users)</td>
<td>Office 365 Government G1</td>
</tr>
<tr>
<td></td>
<td>Office 365 Government G3</td>
</tr>
<tr>
<td></td>
<td>Office 365 Government G4</td>
</tr>
<tr>
<td></td>
<td>Office 365 Government K1</td>
</tr>
</tbody>
</table>
Office 365 a la carte offerings

- Exchange Online Protection
- Visio Pro for Office 365
- OneDrive for Business with Office Online
- Yammer Enterprise
- Exchange Online (Plan 2)
- Exchange Online (Plan 1)
- Exchange Online Kiosk
- Exchange Online Archiving for Exchange Server
- Project Pro for Office 365
- Project Online
- Project Online with Project Pro for Office 365
Office 365 a la carte offerings (cont.)

- Azure Rights Management
- Lync Online (Plan 2)
- Lync Online (Plan 1)
- Project Lite
- Microsoft Dynamics CRM Online Enterprise
- Microsoft Dynamics Marketing Enterprise
- Professional Direct Support for Dynamics Marketing
- Enhanced Support for Microsoft Dynamics Marketing
- Enhanced Support for Microsoft Social Listening
- Microsoft Social Listening Professional
- Professional Direct Support for Microsoft Social Listening
# Online Storage

<table>
<thead>
<tr>
<th>Feature</th>
<th>Limit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site collection quota limit</td>
<td>Up to 1 TB per each site collection</td>
</tr>
<tr>
<td></td>
<td>No upper limit to the amount of storage you can purchase</td>
</tr>
<tr>
<td>Total available tenant storage</td>
<td>1 TB + 500 MB per user</td>
</tr>
<tr>
<td>Personal site storage</td>
<td>Up to 1TB per user, as soon as provisioned</td>
</tr>
<tr>
<td>Public Website storage</td>
<td>5 GB by default</td>
</tr>
<tr>
<td></td>
<td>SharePoint admin can allocate up to 100 GB (the limit for a site collection)</td>
</tr>
<tr>
<td>File upload limit</td>
<td>2 GB per file, soon to be no limit</td>
</tr>
<tr>
<td>Maximum number of external users/invitees</td>
<td>No limit</td>
</tr>
</tbody>
</table>
On premises vs. in the cloud vs. hybrid
### SharePoint on premises vs. in the cloud

<table>
<thead>
<tr>
<th>Category</th>
<th>On Premises</th>
<th>Cloud</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BI</strong></td>
<td>Excel Services, Power View, PowerPivot</td>
<td>Analytics, PerformancePoint</td>
</tr>
<tr>
<td><strong>Search</strong></td>
<td>People/Expertise, hover card, enterprise search</td>
<td>Deep refinement, enhance relevancy</td>
</tr>
<tr>
<td><strong>Developer</strong></td>
<td>Cloud app model, Sandbox, CSOM, BCS</td>
<td>Full-trust code, BCS+</td>
</tr>
<tr>
<td><strong>Admin</strong></td>
<td>Tenant-level, PowerShell, IRM, Recycle Bin</td>
<td>Central Administration</td>
</tr>
<tr>
<td><strong>Internet</strong></td>
<td>Public Website, Design Manager, apps/store</td>
<td>Cross-site scripting, content by search</td>
</tr>
<tr>
<td><strong>ECM / Social</strong></td>
<td>eDiscovery, Records Center, Site Mailbox, Mobile, Newsfeed, Follow, #, @</td>
<td></td>
</tr>
</tbody>
</table>
SharePoint on premises vs. in the cloud

**On premises**
- Farm is within Corporate Firewall
- Internal IT Team can support it
- Availability requirements to meet 99.9% or .99% or .999%
- Need for enterprise level services:
  - BCS
  - PerformancePoint
  - InfoPath
  - Local FAST search

**In the cloud**
- Regularly applied patches
- 99.9% availability only
- Built in DR
- Support for 5 industry compliance standards
  - ISO 27001
  - EU model clauses
  - Accountability Act (HIPAA, BAA)
  - FISMA
  - FERPA
## SharePoint on premises vs. in the cloud

<table>
<thead>
<tr>
<th></th>
<th>On Premises</th>
<th>Online</th>
<th>Hybrid</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cost Involved</strong></td>
<td>Purchase/Maintain hardware software licensing</td>
<td>Purchasing O365 plans &amp; licenses - pay as you go</td>
<td>On premises costs + sliding cost based on usage of O365 features</td>
</tr>
<tr>
<td><strong>Infrastructure &amp; Maintenance</strong></td>
<td>IT Support Team for deployment and farm management</td>
<td>MSFT manages O365 SharePoint Online always has latest patches</td>
<td>Synergistic corporate IT ad MSFT support relationship</td>
</tr>
<tr>
<td><strong>Business Continuity</strong></td>
<td>Design, build and manage the in house SLA</td>
<td>Built into your contract. Guaranteed 99.9% uptime, financially backed service level agreement</td>
<td>On premises needs to stay inline with O365 as best it can</td>
</tr>
<tr>
<td><strong>Feature</strong></td>
<td>OWA workflow management server and application servers need to be installed</td>
<td>Pre-configured features OWS included</td>
<td>Separate features</td>
</tr>
</tbody>
</table>
## On premises vs. in the cloud vs. hybrid

<table>
<thead>
<tr>
<th></th>
<th>On Premises</th>
<th>Online</th>
<th>Hybrid</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Customization Options</strong></td>
<td>Full support for full-trust and client side code can use app store</td>
<td>Limited server side trust full client side options can use app store</td>
<td>Separate features Some require Azure middle tier</td>
</tr>
<tr>
<td><strong>Information Security</strong></td>
<td>Not available for external users</td>
<td>Data in the MDC’s meet SLA and industry standards</td>
<td>Best practice is to use on premises for sensitive information</td>
</tr>
<tr>
<td><strong>Compliance Standard</strong></td>
<td>Need to design and implement Industry standards</td>
<td>Meets compliance and industry standards and are verified by 3rd party auditors</td>
<td>Separate features</td>
</tr>
<tr>
<td><strong>Storage Story</strong></td>
<td>Expensive devices site collections &gt; 100GB scalability is infinite</td>
<td>1 TB per site collection Up to 500,000 site collections Infinite scale</td>
<td>Separate features</td>
</tr>
</tbody>
</table>
Polling Question

- Does your organization have plans to implement SharePoint in the cloud?
  A. Immediate
  B. By the end of 2014
  C. By the end of 2015
  D. No plans/Don’t know
Security and permissions best practices
Implementing security

- Do we manage permissions using?
  - Active Directory groups - Sometimes
  - SharePoint groups - Always
  - Exchange groups - Never

Tip:
A SharePoint security group can contain an AD security group
Security tenets

- Permissions management is best maintained and audited by the use of “groups"
- Maintaining 3 major groups will help with auditing
  - Site Owners (Full Control)
  - Site Members (Contribute)
  - Site Visitors (Read Only)
- Site admin’s add existing Active Directory security groups into these and/or add individual users to these groups
- Federated AD Groups auto synch to SP
Security inheritance

- Maintained at highest level of site collection
- Trickles down to each site, sub site, object
- Can be “broken” to create a unique permission schema
- Using *individual file permissions* and not utilizing *groups*
  - Considerable performance hit as content grows, especially with the search indexer
  - Advise against this method
Key SharePoint features
File preview – Office web apps

Live document previews

Edit, share or follow documents with one click

Track who you’re sharing with

Learn the new Office 365 Open and FPP
Drag and drop upload

In the context of the library, you can drag drop without having to open a special upload window.
Full mobile support

Stay in sync with what’s happening across the organization

Post updates to your newsfeed

Support for iOS devices
Mobile app

Stay in sync with what’s happening across the organization

Post updates to your newsfeed

Access to documents that you have followed
Tasks - Work management service

- Users can view and track ALL of their to-dos and tasks in a timeline
- Tasks can be cached to a user's personal site
- Tasks can be pulled from Exchange, Project Server and SharePoint
- Based on ‘provider model’ so that other systems can be integrated in the future
Microsoft Power BI for Office 365

Insights in Excel

- **Discover**
  - Search, access, and transform public and internal data sources with Power Query

- **Analyze**
  - Easy data modeling and lightning fast in-memory analytics with Power Pivot

- **Visualize**
  - Bold new interactive data visualizations with Power View and Power Map

Collaborate in Office 365

- **Share**
  - Share data views and workbooks refreshable from on-premises and cloud based data sources, with Power BI sites

- **Find**
  - Ask questions and get immediate answers with natural language query

- **Mobile**
  - Mobile access through HTML5 and touch optimized apps for Windows 8, RT and iOS tablets

Scalable | Manageable | Trusted
SharePoint Online Demo
Introducing OneDrive for Business
OneDrive for Business

- OneDrive icon on Windows
- Folder is similar to My Documents/Shared Documents view
- Same as Windows 7’s My Documents and Public Documents
OneDrive for Business

- Features for a OneDrive library includes:
  - Metadata searching, social networking, collaboration, workflow and compliance
- Click “Sync” on a SharePoint library, you will get the documents offline in your Windows Explorer, Office applications and more

Documents

<table>
<thead>
<tr>
<th>new</th>
<th>upload</th>
<th>sync</th>
<th>edit</th>
<th>manage</th>
<th>share</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Documents</td>
<td>Hyrdo</td>
<td>...</td>
<td>Find a file</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Modified</th>
<th>Modified By</th>
<th>Location</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Another Test Document</td>
<td>August 21, 2013</td>
<td>Mike Gilronan</td>
<td>Hydroelectric Plant</td>
<td>Strategy</td>
</tr>
<tr>
<td>McGladrey SharePoint Intranets</td>
<td>August 21, 2013</td>
<td>Mike Gilronan</td>
<td>Electrogenerate Wind Farm</td>
<td>Strategy</td>
</tr>
</tbody>
</table>
Next steps
How you can get started today

- How to buy Office 365
- Fast Track
- Learn more
  - October 18\textsuperscript{th} - SharePoint Saturday New Hampshire (SPSNH)
  - November 8\textsuperscript{th} – SharePoint Saturday Minnesota
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