

# Microsoft SharePoint Online for Office 365 Administering and configuring for the cloud

Bill English



# Microsoft SharePoint Online for Office 365: Administering and configuring for the cloud

**Bill English**

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# Introduction

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Regardless of your title, if you're responsible for designing, configuring, implementing, or managing a SharePoint Online deployment, this book is for you. If you're a member of the team in your organization that is responsible for SharePoint Online in your environment, this book will help you understand what your team needs to think about when it comes to your deployment. If you're responsible for managing a consulting firm that is implementing SharePoint Online on your behalf, you need to read this book.

If you are totally new to SharePoint administration, this book will help you ramp up on how to administrate SharePoint Online—not only because I go through many (but not all) of the core “how to” tasks in which administrators engage, but because I also drop in comments as to “why” you're doing what you're doing and offer ideas to consider relative to that task. In fact, nearly all of Chapter 10, “Site-collection administration,” has little to do with *how* to administrate a site collection—it is focused on the business issues that naturally bubble up when SharePoint Online is used.

Solving the core problems of governance, risk, compliance, taxonomies, processes, and training associated with a SharePoint Online deployment is the macro focus of this book and is, in my view, the core of good SharePoint administration. For those who are looking for deep technical drill-downs in the technology, there's a plethora of books, blog posts, podcasts, conferences, magazine articles, online articles, white papers, and websites that will satisfy your curiosities. But don't look to this book to reveal that type of knowledge. I didn't write this book for the highly technical audience.

## About the companion content

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The companion content for this book can be downloaded from the following page:

<http://aka.ms/SPO/files>

The companion content includes the following:

- Several processes in Visio form that you can modify to fit your own environment
- A document or artifact file plan in Word that will help you with your taxonomy and information organization planning efforts

## Acknowledgments

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It's been five years since I wrote my last book. From 2000 through 2010, I authored or co-authored 14 books. Then it turned out that I didn't write for five years. Writing this book reminded me how much I enjoyed the process of writing. I'm one of those nerds who likes to learn and write. It's as much a curse as it is a blessing.

I had also forgotten what a joy it is to work with Karen Szall, the project editor for this book. I've worked with her on several book projects before. As usual, she was not only professional and easy to work with, she didn't pester me when I got behind on the writing schedule. Karen, I'd love to work with you in the future, and for what it's worth—whatever they're paying you, it isn't enough! You're the best!

My good friend Ben Curry—one of the owners at Summit 7 Systems—stepped up to the technical editor role on this project. He corrected mistakes, found errors, and added significant value to this book. While you won't see his name on the cover, you will see the results of his work on nearly every page. He and I co-authored books in the past, and he is also a highly acclaimed author in the SharePoint space. Any mistakes you find in the book are mine, not his. Thanks, Ben, for being a great friend and for helping out on short notice.

Roger LeBlanc was the copy editor on this book. I continue to be amazed at how good copy editors take average writing and turn it into something that just flows and yet is clear and concise. I don't have that ability, but Roger does. Thanks for your hard work, Roger. Along with me, all the readers of this book deeply appreciate your efforts!

Brett Lonsdale, the owner at Lightning Tools—a company you should become familiar with—stepped up on short notice to write Chapter 3, "Working with Business Connectivity Services." I can't think of anyone who knows the BCS technology better than Brett and his team. Brett wrote a great chapter and added real value to what is included in this book. Thanks, Brett, for your help, your flexibility, and your friendship.

Back here in Minnesota, I want to thank my wife, Kathy, for her continued support of my ever-changing workloads and environments. I can't think of anyone better to have married. Thanks for being my best friend and my wife. I also want to engage in a short contest with my two kids, David and Anna, who are both teenagers now. (Where did the time go?) Whoever reads this acknowledgement first and tells me they read it gets a free Caribou coffee and mug—your choice on both counts. As always: I love you both more than life itself.

Finally, I'd like to thank Jesus Christ, my Lord and Savior, for giving me the talent and the opportunity to write this book and without whom I would be lost forever.

Bill English

May 7, 2015

Maple Grove, Minnesota

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# Managing user profiles

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In this chapter, we're going to dive into the management of user profiles and I'll explain why user profiles are important to larger organizations that use Microsoft Office 365 and SharePoint Online. User profiles can be the bane of your existence or one of the big wins for your organization. Much of how you and your users experience user profiles in SharePoint Online is directly related to how well you manage this part and then present it to your organization.

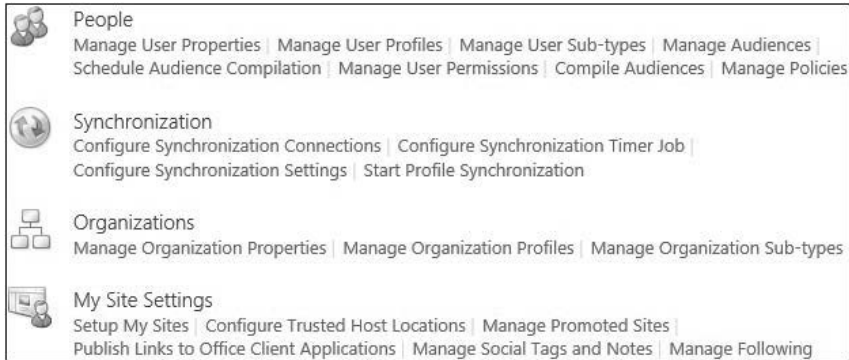
As with most software platforms, it doesn't do much good to turn on platform features if they get in the way of how people work, the processes under which they are most comfortable working, and the inputs and outputs of their daily routines. Just because SharePoint Online *can* do something for your organization doesn't mean that it *should*.

Yet I am hard-pressed to explain, except in the smallest of environments, how a robust use of user profiles will cause damage or slow processes down. Indeed, I believe the opposite is the reality. User profiles organize expertise and experience—two elements that reside inside people and that cannot be easily codified. So making your users organize their experience such that their core value to the organization can be found, leveraged, and easily used—it seems to me—makes huge sense.

The SharePoint Online version does not include any of the synchronization administrative activities that you'll find in an on-premises deployment. Compare Figures 2-1 and 2-2 and you'll see that I won't be covering any synchronization topics that you might normally expect to see in a SharePoint administration book, because those tasks have been deprecated in SharePoint Online for the Information Technology professional (IT pro).



**FIGURE 2-1** SharePoint Online User Profiles administration interface



**FIGURE 2-2** SharePoint On-Premises User Profile Services administrative interface

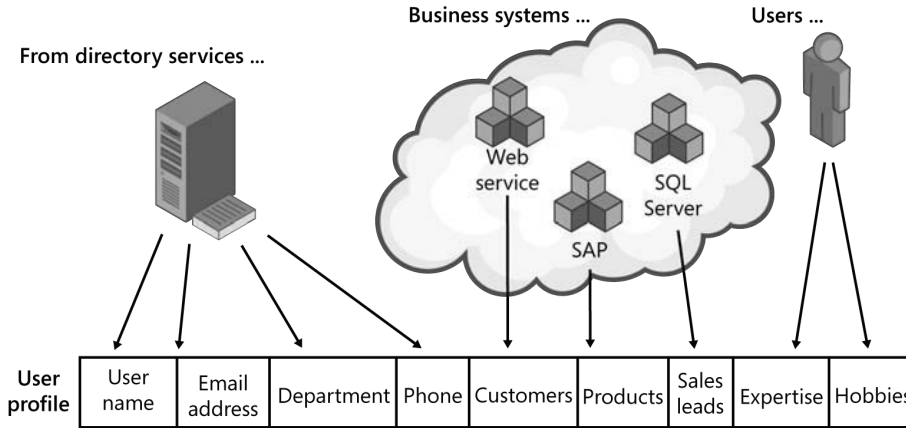
## Introduction to user profiles, audiences, and My Sites

A user profile is a collection of user properties along with the policies and settings associated with each of those properties. A user profile is a description of a single user—not just that user’s account, but the user’s skills, experiences, expertise, and other metadata that can be useful in finding that user for particular purposes.

By default, the user-profile properties are populated from the Azure Active Directory service via a one-way synchronization at least once every 24 hours. If your organization manually created user accounts in the Office 365 directory service, users will receive Microsoft Azure Active Directory credentials for signing into the Azure Active Directory service. Similar to SharePoint 2013, Office 365 performs only authorization. It leaves authentication to the Azure Active Directory. These credentials are separate from other desktop or corporate credentials, although in hybrid implementations, there will be a synchronization with your on-premises Active Directory using the Azure Active Directory Connect tool. You’ll use the Office 365 Admin Center to make changes to these user accounts.

If your organization is synchronizing Azure Active Directory with an on-premises Active Directory, your user profiles are being synchronized with the Azure Active Directory, which is then synched with SharePoint Online user profiles. Active Directory information goes in only

one direction—from the on-premises Active Directory server to Azure Active Directory, which is then synchronized with SharePoint Online. This ensures that user information in SharePoint Online reflects the most current and accurate state of your user data in Active Directory.



Not all profile information is synchronized from a directory service. Each profile property can be sourced from a different location, such as direct user input, HR systems, directory services, or all of these. New profile properties created within SharePoint Online can pull from various systems, but these custom properties cannot write back to those systems.

Somewhat similar to profiles are *audiences*. Audiences enable organizations to target content to users based on who they are when they come to the page. Audiences are built at the profile layer but applied at the site and web-part layers, depending on how the audience is used. Audiences can be defined by one of the following elements or a combination of them:

- Membership in a distribution list
- Membership in a Microsoft Windows security group
- Location in organizational reporting structure
- Public user-profile properties

Audiences are not a security feature. For example, even if a person is not a member of an audience, if she has permissions to a web part and has the URL of that web part, she will be able to access the content within the web part. So think of audiences as a view-crafting feature—you get to select what people see when they come to the page based on a set of predefined characteristics that are defined within a set of audience rules.

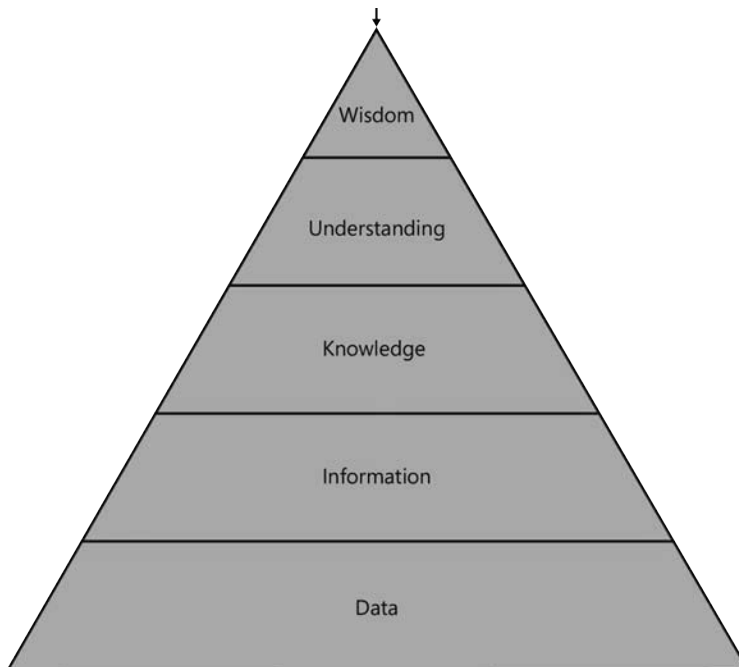
My Site settings and experiences are also affected by user profiles. My Sites are essentially personal portals that give individual users the ability to have a one-to-many collaboration path with the enterprise. My Sites are where the social features of SharePoint Online are consumed (for the most part) and represent a type of personal space that can be individualized directly by the user.

# People

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People often represent the highest level of information in your organization. *Tacit* knowledge (knowledge that has not been written down) continues to be the most sought-after knowledge in most organizations, because it often represents wisdom and understanding that isn't easily codified.

When you look at the four levels of information in the following illustration, you can swiftly discern that people need the top two levels of information—understanding and wisdom—to make excellent decisions. But most information management and retrieval systems are not built with this hierarchy in mind. And besides, how would you build a term set to describe tacit knowledge, anyway?



The levels of information can be described as follows:

- **Level 1 – Data** This is just the raw data, such as numbers (1, 2, 3) or symbols (a, b, c, or “this”, “car”). I’ll create a running example here—we’ll use “20” as our data.
- **Level 2 – Information** This is where the Data is given some context. For example, the “20” is useless until it has context, such as “20 dollars”, where “20” is data, “20 dollars” is information.
- **Level 3 – Knowledge** This is where information is related to another piece of information—for example, if “20 dollars” is related to the 10 dollar price of

two cappuccinos. At this point, you know you have enough to purchase the two cappuccinos, but perhaps not enough to purchase two concert tickets that might cost 200 dollars.

- **Level 4 – Understanding** This is where Knowledge is put into use or is made actionable. For example, you might decide that asking that special person out for two cappuccinos is a great idea, so you understand that to spend time with that special person, you'll need to spend some of that 20 dollars.
- **Level 5 – Wisdom** This is where Understanding is evaluated and filtered through our intuition, training, and experience. For example, you might decide that it's a wise choice to ask that special person out for two cappuccinos, but after spending time with him or her, you realize that it was not as wise a choice as you initially thought.

Understanding and wisdom come with experience and time. Until you've been there, done that, you don't really *know* what to do in a given situation. But if you've been through similar experiences several times, when the next similar scenario presents itself, you'll have instinctive wisdom about what to do or not do. Combining experience with intuition and relevant data is the essence of wisdom. Not everyone can do this in your organization, but those who can become leaders and decision makers.

**MORE INFO** SharePoint Online operates in all five levels. It can hold raw data in lists or provide lookups to databases. Information can be related in SharePoint Online, not only by relating lists, but by using the Managed Metadata Service and the User Profile Service. Relating term sets to documents and user profiles to accounts is an excellent example of how SharePoint can enable the relating of data.

SharePoint provides knowledge-based environments by supporting document collaboration, document management, and other intelligence-oriented services, such as Power BI, Excel Services, and SQL Reporting Services. SharePoint Online supports Understanding—actionable content—by surfacing the right content to the right people at the time they need it to make decisions. This can be accomplished through a robust Search deployment, complete with accurate content types, result sets, and result templates. Finally, wisdom can be codified through community sites and blogs.

SharePoint Online can interact with all five levels of information and become much more than a collaboration tool—it can become an intelligence tool for your organization.

This is why organizing elements that point to experience and expertise are so important to any organization. For example, if my company is building out the fall marketing campaign, would it not be helpful to me to talk with the leaders of past marketing campaigns so that I can know what *not* to do as well as what to do? If my company employs 10,000 people, finding the right people might be difficult—perhaps they have moved on to different jobs with different titles or perhaps they have left the company altogether.

So organizing people—their experience and expertise—can be a huge benefit to your organization. Consider creating profile fields that allow users to be organized based on the following characteristics:

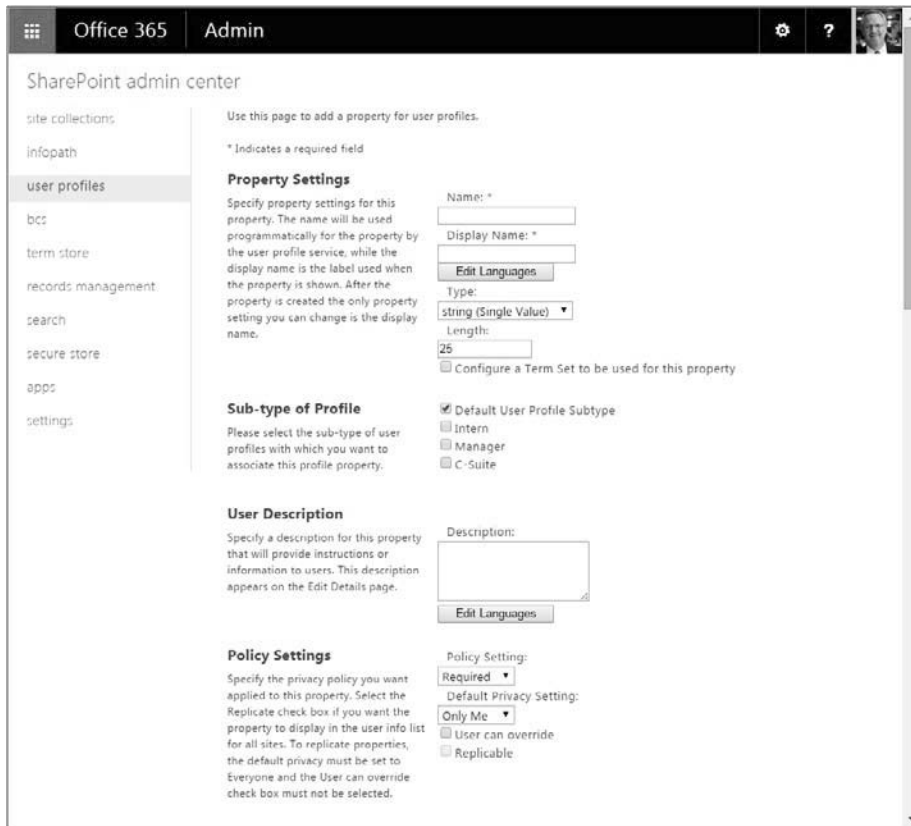
- Past titles
- Current titles
- Degrees earned
- Industry certificates earned
- Industry licenses and credentials earned
- Awards received
- Projects worked on
- Past reporting relationships
- Hobbies
- Current skills
- Department
- Internal training completed
- Schools attended

The list could go on and on. My point is that you need to find ways to describe what people know and what they can do in a way that helps others who need that knowledge or those skills find them swiftly and easily.

## Manage user properties

When you click the Manage User Properties link under the People section, you're taken to the page where you can create, modify, and delete user-profile properties. The default list is pretty extensive, comprising roughly 99 profile fields. Still, you will likely think of more fields to create that will be better descriptors in your environment. To create a new profile field, click the New Property link (not illustrated).

Once the New Property link is selected you'll be presented with a screen to create a new profile property. (See Figure 2-3.)



**FIGURE 2-3** The new profile creation screen in SharePoint Online

When creating the new profile property, there are several key decision points you should address. If you combine the use of descriptive terms from the term store with the user profiles, you can achieve significant organization and increase the findability of expertise. Use these property definitions to your advantage (I'll discuss the more important configurations here—space limits my ability to go in depth into each configuration option):

- Configure A Term Set To Be Used For This Property** If the values for this property can be built into a pick-list rather than a free-text value, the list should be built in the term store and consumed by the profile property. Having a standard set of terms from which to pick differentiates *meaning* between each term. Also, it helps ensure everyone uses the same set of terms rather than having each user enter a term that is meaningful to them but lacks meaning to others. For example, in a list of colleges attended, a standard term might be “University of Minnesota,” whereas a meaningful term for a person who has attended that school might be simply “Minnesota” or “U of M.” Shortcut terms or abbreviations should be avoided in standard term sets so that the terms that appear are both meaningful and clear as to their meaning.

- **Allow Users To Edit The Values For This Property** If you're going to expose a list of values from a term set in the term store from which users can select their values, you need to allow users to edit the values for the property in question.
- **Show On The Edit Details Page** By selecting this check box, you can ensure that users can easily make their selection for this profile property.

**MORE INFO** To learn more about the use of descriptive terms and the term store, see Chapter 4, "Managing a term store in SharePoint Online."

If the profile property values cannot be coalesced into a pick list, you're left with users entering their own values; potentially misspelling words, inputting garbage into the field, or using words that are individually meaningful but lack value in the enterprise. Most users will not enter information with nefarious intentions, but they can unwittingly cause confusion with the terms and phrases they enter. Although such properties might be helpful in some way, I would advise that, as much as possible, you should rely on standard lists for the user-profile metadata.

From a risk and governance perspective, not building out a robust user-profile system can represent a loss of applied expertise and can create opportunity costs in which the same or similar mistakes are made by different employees over time when acting in similar capacities. Acquired understanding and wisdom that your organization paid for in the form of salaries goes unused when people work without the benefit of the wisdom of those who have gone before them. Compliance that lowers the risks represented in the opportunity costs includes having users fully fill out their user profiles and build a culture of collaboration across organizational teams, departments, divisions, and hierarchies. Of course, this assumes that the profile properties can tightly discriminate between users and surface experience and expertise in a way that helps propel your organization forward in fulfilling its strategic objectives.

## Manage subtypes

Profile subtypes can be used to create a different set of properties for a different set of users. For example, you can create a subtype that categorizes a user as either an intern or a full-time employee. So, instead of having a one-size-fits-all profile for every user in your organization, each user type (defined by you, the system administrator) can have its own set of profile properties. For example, you might want to create the following sets of profiles: Manager and Intern. Hence, you would draw up something like this:

Profile Property	Manager	Intern
About Me	Yes	No
Department	Yes	Yes
Skills	Yes	Yes



Profile Property	Manager	Intern
Current Job Title	Yes	No
Current School	No	Yes
Degrees Earned	Yes	No
Former Job Titles	Yes	No

While all these properties would be created within the overall user-profile service, the subtypes would allow you to associate each property with one profile type or more and then assign that profile type to the users.

## Manage audiences

Creating audiences is a straightforward process. You first create the audience and decide if membership in the audience should satisfy all the rules that will define the audience or any one of the rules that defines the audience. After creating the audience, you need to create the rules that will define membership in the audience.

Membership (shown in Figure 2-4) can be defined in these pragmatic ways:

- Existing membership in an Azure security group, distribution list, or organizational hierarchy
- Existing reporting relationship, such as whether the user reports to another user account
- A particular value assigned to a particular profile property—for example, a user whose Department property in his profile is defined as “Accounting”
- A particular value *not* assigned to a particular profile property—for example, a user whose City in her profile is anything but “Minneapolis”

More than one rule can define membership in an audience, so you can combine multiple rules to create unique audiences. For example, let’s say Juan has 120 people who report to him, but they work in three locations: Minneapolis, Indianapolis, and London. You want to build an audience for those who report to Juan but include only those who live in Minneapolis and who are working in the Marketing department. So you create three rules:

- **Rule 1** User reports to (“under” is the word used in the interface) Juan
- **Rule 2** User’s Office Location equals “Minneapolis”
- **Rule 3** User’s Department equals “Marketing”

The rules are not parsed in any particular order, so they can be taken as a whole. For each distinct aspect of the membership, you should plan to build a rule that defines that aspect and not try to combine two aspects into the same rule.

Audiences are applied at the site and web-part layers. In most web parts, you'll find the ability to assign an audience under the Advanced properties of the web part, which are shown in Figure 2-4.



The image shows a dialog box for the Advanced properties of a web part. It contains several fields and controls:

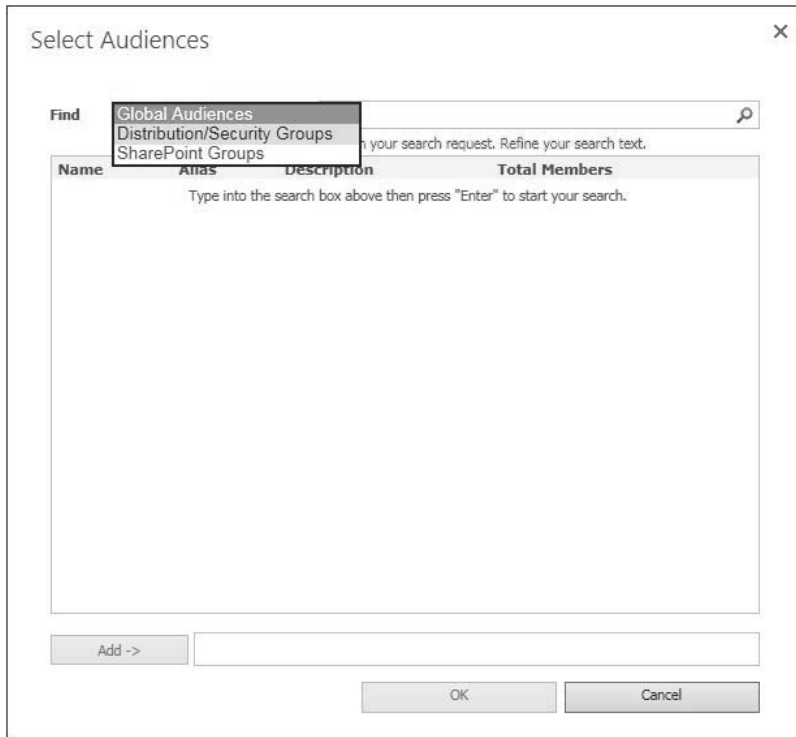
- Export Mode:** A dropdown menu with "Export all data" selected.
- Title URL:** An empty text input field.
- Description:** A text input field containing "Site Feed contains microbloggin".
- Help URL:** An empty text input field.
- Help Mode:** A dropdown menu with "Modeless" selected.
- Catalog Icon Image URL:** An empty text input field.
- Title Icon Image URL:** An empty text input field.
- Import Error Message:** A text input field containing "Cannot import this Web Part."
- Target Audiences:** A text input field that is currently empty, with a small icon to its right that looks like a document with a magnifying glass.

At the bottom of the dialog box are three buttons: "OK", "Cancel", and "Apply".

**FIGURE 2-4** Target Audience input box in the Advanced properties section of a web part

Audiences you create in the SharePoint Admin Center will appear as Global Audiences (as shown in Figure 2-5) after you click the Browse button.

Note that audiences don't need to be created only from the Global Audiences. Audiences also can be assigned from distribution groups, security groups, or both from your directory service as well as from SharePoint groups from within your site collection. This gives your site-collection administrators the ability to create audiences without looping through the SharePoint Admin Center.



**FIGURE 2-5** The Select Audiences screen, where you can create audiences from multiple sources

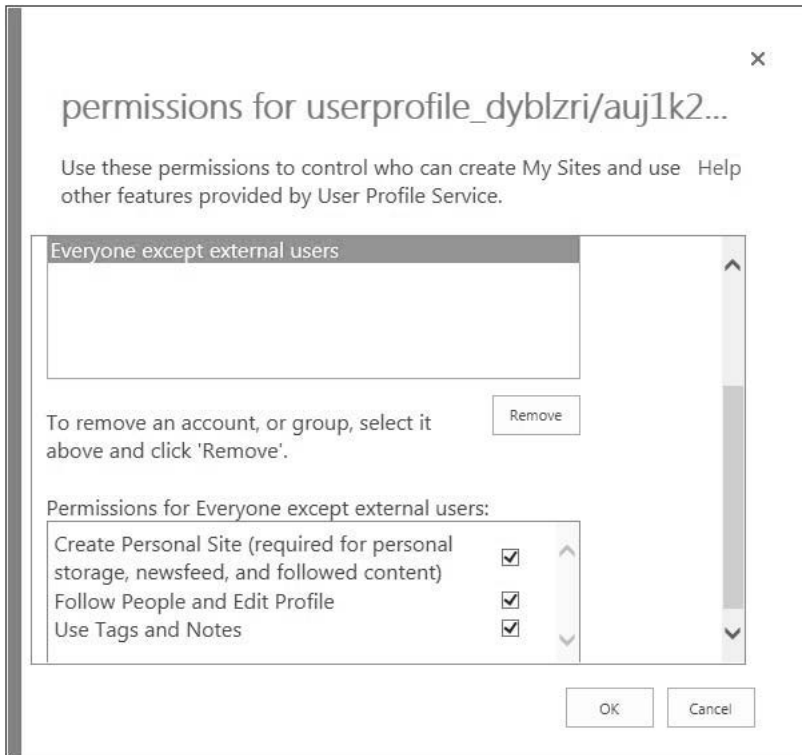
This is not something that you, the SharePoint system administrator, tries to control. Recall that audiences are not a security feature—they are a view-crafting feature. If it is advantageous to your users within a site collection to create SharePoint groups and then use them as audiences, this should be supported. This is the type of ownership-of-collaboration processes that you'll want to foster in your environment.

From a governance perspective, if end users are selecting groups or distribution lists to build audiences, it would be ideal if they have a way to enumerate the memberships without having to loop through the IT department. Keeping the administration transaction costs low is essential to SharePoint Online being well adopted within your environment. If users don't have a way to do this, they might assign an audience to a resource and either overexpose or underexpose that resource in the interface.

Although this isn't a security issue, it could be an irritant that causes unnecessary support cycles. It is better to anticipate the potential support and process problems in advance and fix them before they cause real problems in your environment and, perhaps, dampen enthusiasm for SharePoint Online adoption.

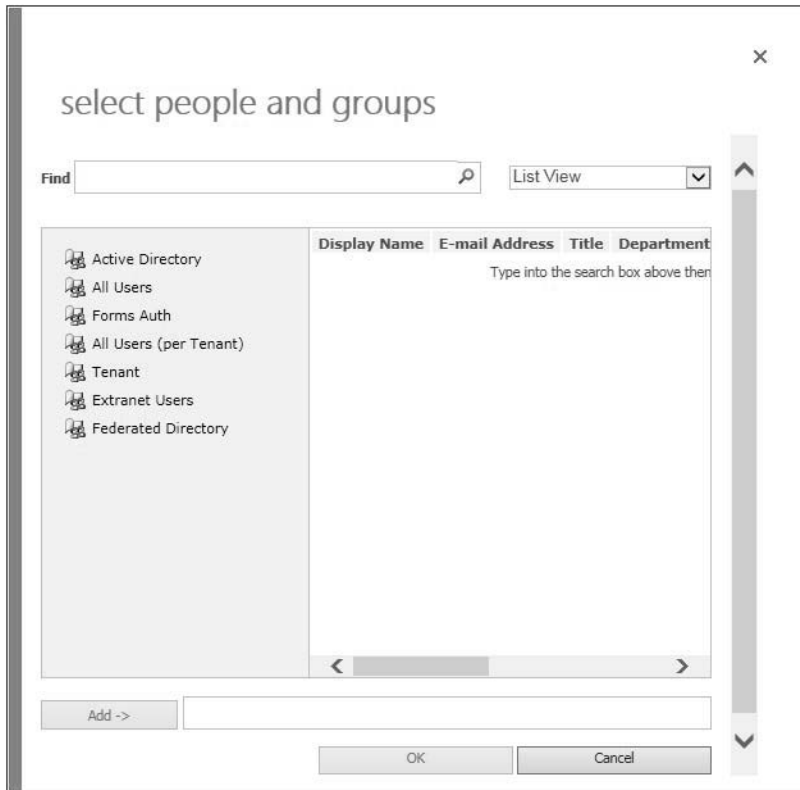
## Manage user profile permissions

When you click the Manage User Permissions link within the People section of the User Profiles page, you'll be presented with a dialog box within which you can set permissions for who can create My Sites (shown as Create Personal Site in Figure 2-6) as well as configure settings for following people, editing their profile, and using tags and notes.



**FIGURE 2-6** The dialog box that displays when you click Manage User Permissions

By default, the Everyone Except External Users is applied, which allows every user to perform all these actions, but you can restrict permissions by individual account or by group. The groups can be created within SharePoint Online, Azure Active Directory, or Windows Active Directory (if you're in a hybrid environment) and consumed from a number of sources. These sources appear when you click the Address Book button to select which users and groups you want to manage for this purpose. (See Figure 2-7.) Of course, these sources need to be properly configured and populated before they will be of any value to you. Just because the source appears here—such as Forms Auth—doesn't mean you can click on that source and find groups configured within them.



**FIGURE 2-7** The Select People And Groups dialog box

Once you select a group, you can assign permissions to it such that membership in that group opens up the features and functionalities stated earlier. A common example of how this is used is for My Site creation and administration. I know of Microsoft customers who created a “Ready For My Site” (or some other name that was meaningful to them) security group in Windows Active Directory and assigned the available permissions to that group (refer back to Figure 2-6). As users attended training specific to My Sites and social technologies in SharePoint Online, their accounts were added into the Ready For My Site security group and thus were given permission to create a new personal site and engage in social activities.

## Manage policies

Policies are used to govern the visibility of information in user-profile properties to others in the organization. These policies really represent privacy options that you, as the system administrator, configure on a global basis per profile property. This granularity might require additional administrative effort on your part, but it also enables each profile property to be aligned with your organization’s existing privacy and sharing policies.

The policies can be required, optional, or disabled. *Required* means the property must contain information and the information is shared based on default access. *Optional* means the property is created but its values are supplied by each user if they are not supplied automatically. In the case of the former, each user decides whether to provide values for the property or leave the property empty. *Disabled* means the property or feature is visible only to the User Profile Service administrator. It does not appear in personalized sites or web parts, and it cannot be shared.

The User Override option enables users to change the visibility settings for those properties when this check box is selected. Regardless of whether or not the User Override option is selected, when you create a new profile property, the user can always override the setting. Essentially, this means you cannot create a new profile property, set a value, and force users to live with that value.

The two basic Privacy choices are Only Me and Everyone. It's either wide open or locked down to the individual user who the profile is describing. You select the User Can Override check box if you want to allow users to make their own selection on a given profile property. The most common way to use this check box is to set the property to Only Me and then allow users to choose if they want to open up that property to everyone else in the organization.

If you select the Replicable check box, you're allowing user-profile data to be replicated to the various sites to display in the user information list. This is a good selection if surfacing social data is your goal. However, once the data is replicated, it cannot be removed by simply clearing this check box. The data will persist. So be sure you want this data replicated before selecting the Replicable check box.

For confidential or sensitive profile descriptors, it's best to leave it at the setting you select and then clear the User Can Override check box.

**NOTE** My Sites are private by default. Make My Sites Public is a privacy setting that an administrator can use to make all users' My Sites public by default. The Make My Sites Public setting is located in the User Profile service application under Setup My Sites. Even if an administrator configures any of these policy settings, these policy settings are overridden if the Make My Sites Public setting is selected.

## Organizations

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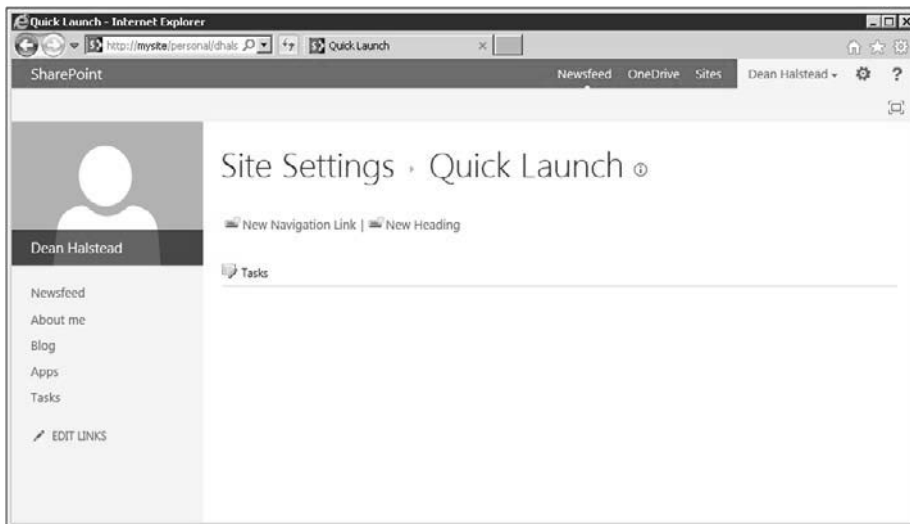
Similar to how users can have profiles in SharePoint Online, organizations can have profiles too. Where the user fits within the larger organization chart can be exposed using the Org Chart web part that is included in SharePoint Online. It is a web part that must be added to the user's My Site.

The Org Chart web part that was visible under the About Me section of MySites in previous versions of SharePoint is now hidden in SharePoint 2013 by default. But when you view the About Me page of any other employee it is displayed. This behavior is by design, because it leads to better performance.

In previous versions of SharePoint, the profile page always loaded the Org Chart web part. Loading peer, manager, and direct-report data actually requires an extra database lookup, which contributes to a longer page load time. Because most users prefer to have their personal profile page load faster than to see their own position in the organizational hierarchy, the Org Chart web part is hidden when a user views her own profile page.

**NOTE** You will need Silverlight installed to run the Organization Chart web part.

Each user will need to add the organization chart to his My Site. A user starts by logging in to his My Site. Because each My Site is a site collection, each user is the Site Collection administrator of his own My Site. Once a user is logged in, he should open Site Settings and select the Quick Launch link under the Look And Feel section. When the user does this, he is presented with the Quick Launch screen (shown in Figure 2-8), in which he can add new headings and navigation links. Have the user click New Heading in the interface.



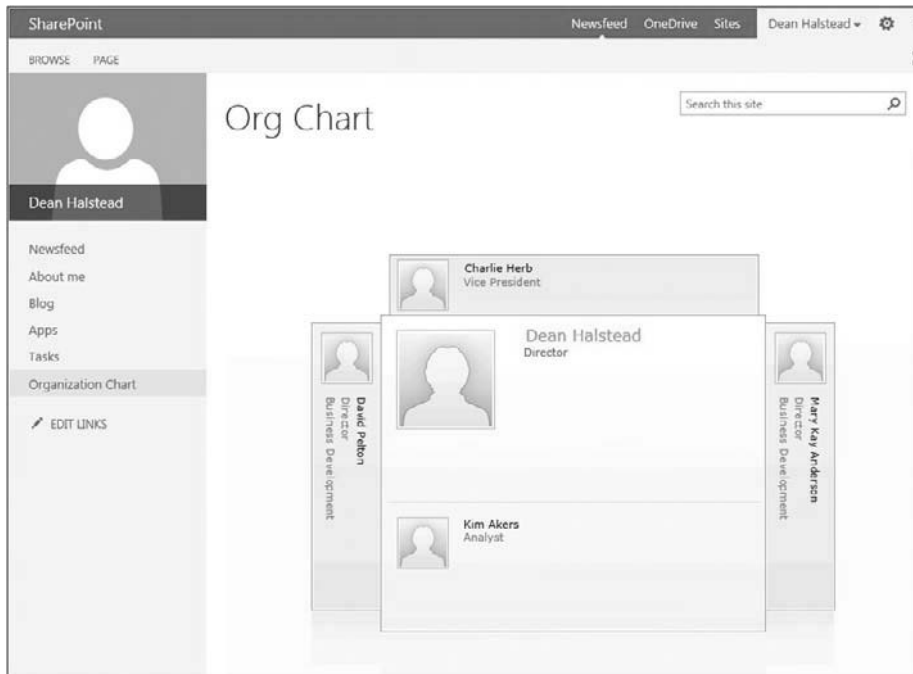
**FIGURE 2-8** Quick Launch screen

After selecting New Heading, the user sets the web address to **http://<my site host collection root site URL>/organizationview.aspx** and sets the description to **Organization Chart**.

**IMPORTANT** Be sure to have your users enter the exact same description into the Description field so that there is visual consistency across your organization when using this web part.

You also should prescribe where this entry should appear in the heading hierarchy. By prescribing and enforcing the heading name and location, you'll create a more usable and enjoyable experience for those who use this web part to find experience and expertise within the organization. Because there is no way to *enforce* this prescription within SharePoint Online itself, I think it is best to use spot checks as your enforcement mechanism. So visit the public My Sites for a randomly selected number of users each month and visually check that their organization chart is properly working, titled correctly, and placed in the prescribed sequence within the Quick Launch hierarchy.

After pictures and About Me information is filled in, you'll find the Organization Chart (shown in Figure 2-9) to be rather helpful in traversing your organization chart to find the right individual(s) you need to connect with at any given time.

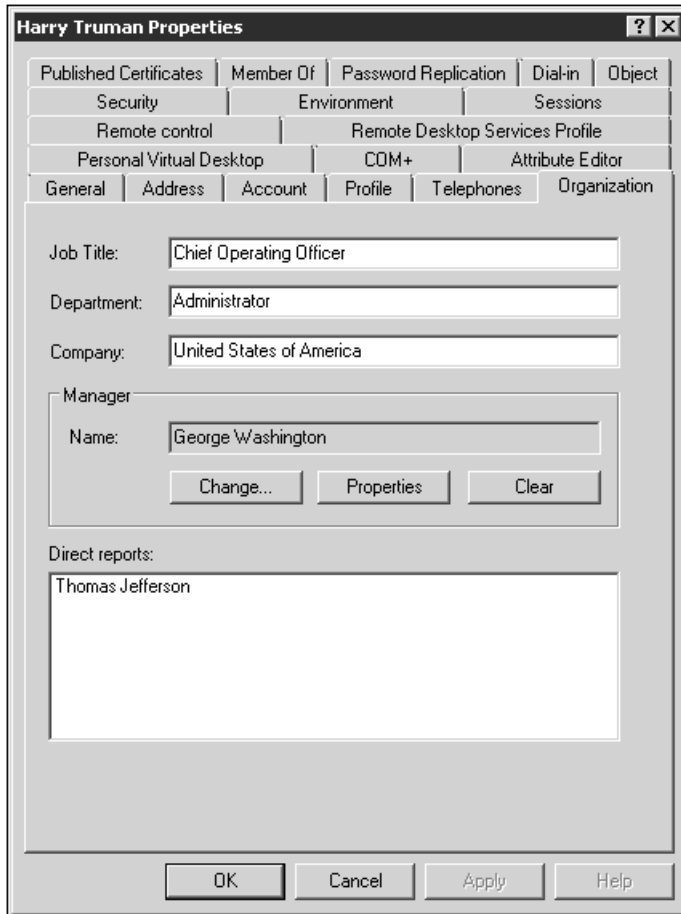


**FIGURE 2-9** Organization chart in SharePoint Online

Note that this chart is focused on Harry Truman's place within the organization even though I'm on Millard Fillmore's public My Site. This means the entire chart can be traversed from any user's My Site that has the chart exposed.



Remember, this organization chart is sourced from your directory services. If you haven't filled in the organization information in the directory services, the organization chart can't do its job. In Windows Active Directory, you need to have filled in the Organization tab to achieve a baseline of information with which the Organization Chart web part can work. (See Figure 2-10.) If you're not importing information from Windows Active Directory and you're using only Azure Active Directory, you won't find an Organization page in the user's properties in Azure Active Directory.



**FIGURE 2-10** The Organization tab in the properties of a Windows Active Directory user account

From a governance perspective, you'll want to ensure your employee onboarding processes loop through your Windows Active Directory or Azure Active Directory services teams such that the new employee's organization and other pertinent information is entered into her account as it is initially being created. Although the information can be added later, from a process viewpoint, it is more efficient to add that information to the account as it is being created.

You'll also want the onboarding employee to log in to Office 365 and create her My Site right away, and then add the organization chart to her public-facing My Site.

**TIP** It is probably a good idea to have developers force this chart onto each user's My Site so that they don't have to add it individually if you plan to have the organization chart exposed on each My Site.

**TIP** If you want to expose the organization chart on a page other than the user's My Site, consult with this thread as a starting point: <https://social.msdn.microsoft.com/Forums/office/en-US/d31d080f-3f13-4c5b-8ae5-68cb4418d7c0/organization-browser-web-part?forum=sharepointgeneralprevious>. Note that this thread is discussed from an on-premises viewpoint, not an Office 365 viewpoint, so you'll need to consult with a developer to see if these ideas can be ported to SharePoint Online.

## My Site settings

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My Sites are personal portals that allows users to collaborate with others and offer ideas to the enterprise. I've been surprised at how many organizations have demurred from the use of My Sites. I suspect, over time, however, the collaboration and social features will become baked into the core processes such that My Sites will be routinely used.

My Sites must first be set up and then you can configure trusted host locations, manage promoted sites, and publish links to Office client applications. Let's get started by looking at the setup of the My Sites in SharePoint Online.

## My Site setup

In SharePoint Online, the setup of My Sites is managed from a single page. The environment is automatically created for you when your Office 365 tenant is created. You cannot change the My Site Host or the Personal Site Location like you can with an on-premises installation.

## Preferred Search Center

The setup starts with the option to enter a Preferred Search Center. I find this to be particularly useful if you created an Enterprise Search Center. Having their queries automatically redirected to a global search center is useful if your users want to search for global content from within their My Site. However, if this is not a need, you can leave this input box (shown in Figure 2-11) blank and let users manually traverse to the Enterprise Search Center (assuming you created one) when they want to make global queries.

Preferred Search Center	
Setting the preferred search center allows you to control which search center users are taken to when they execute a search from the My Site profile page.	Preferred Search Center: <input type="text" value="https://englishventures.si"/> Example: http://sitename/SearchCenter/Pages/ Search scope for finding people: <input type="text" value="People"/> Search scope for finding documents: <input type="text" value="All Sites"/>

**FIGURE 2-11** Working with the Preferred Search Center

Note that you can select the default search scopes for finding people and documents. This screen in SharePoint Online is outdated in the sense that it uses SharePoint 2010 terminology (scopes) instead of SharePoint 2013 terminology (result sources). Don't confuse the two. *Result sources* are the updated and more mature version of search scopes and can include real-time queries and filters as well as carving out a portion of the index against which the keyword query is committed.

## Read Permission Level

In the Read Permission Level input box (not illustrated), you'll enter the accounts to whom you want to grant the Read permission level for each My Site when it is created. You'll need to ensure that these accounts have the correct Personalization services permission to use personal features and create personal sites. (See the "Manage user profile permissions" section earlier in this chapter.) You'll also need to ensure that the public My Site page in the My Site host site collection has these accounts assigned the Read permission. This configuration is not retroactive. If your users create a number of My Sites and then you change permissions here, those My Sites already created will not inherit the changed permissions from this page.

The default permission group is Everyone Except External Users. By default, all Office 365 users in your tenant automatically have Contribute permissions on all lists and libraries because this group is automatically added to each list and library in each site across your tenant with the permission level Contribute. This means, by default, that all users have Contribute permissions to the document library (named *Documents*) created in each user's My Site.

**IMPORTANT** From a risk-management perspective, this is far too generous with regard to default permission assignments. It opens resources to users who might not need to access those resources. Office 365 is built from a departmental, sharing viewpoint. Care must be given to remove this group from the Members group when needed, and site-collection administrators should be trained how to effectively manage permissions within their own site collection. It would be better to leave the default Documents library empty and create new document libraries in which you manually set permissions as needed.

## Newsfeed

You'll have two check boxes with which to concern yourself in this section. The first check box, *Enable Activities In My Site Newsfeeds*, specifies whether or not to enable activities in the My Sites newsfeeds (not illustrated). If you select this check box, notifications can be generated when certain events occur from people and content the user follows. This check box is selected by default. Unless you have a specific reason to turn this off, leaving it selected is preferred. For example, if John is following Suzie and she follows a site that interests her, that Follow event will appear in John's activity feed.

The second check box, *Enable SharePoint 2010 Activity Migrations*, enables SharePoint 2010 activity migrations. The word *migrations* is misleading: this selection simply means that if your organization is making use of SharePoint 2010 legacy activities, those can appear in the activity feeds as well. You select this only when you're in a hybrid deployment between your SharePoint 2010 On-Premises farm and your SharePoint Online deployment.

## Email notifications

Type the address you want used for sending certain email notifications for newsfeed activities in the *String To Be Used As Sender's Email Address* input box. This address need not be a monitored mailbox. If you select the *Enable Newsfeed Email Notifications* check box, you'll allow users to receive email messages for newsfeed activities, such as mentions or replies to conversations they've participated in. You'll need to assess the usefulness of these types of email notifications. If there are too many of them, they just become white noise in the user's inbox and no longer serve their alerting purpose.

## My Site cleanup

Fortunately, in SharePoint Online, My Sites are automatically cleaned up after 14 days have passed since a user's profile is deleted. This means that, by default, the user's My Site is deleted and no longer accessible. By default, if the user's manager can be discerned by the system, it will give the user's manager full access rights to the user's My Site. This permission level enables the manager to pull out information needed for the ongoing work of the organization before the My Site is deleted by the system.

However, you can input a secondary name in the *Secondary Owner* picker box to specify a person who also will have owner access to the My Site after the user's profile has been deleted. I highly recommend you enter an account here to ensure you have a backdoor into each My Site once the profile is deleted.

From a risk and governance perspective, you should have an account designated for this purpose, and the account credentials should be made available to those in a need-to-know situation so that critical information isn't lost. Because the password can be changed by the tenant administrator, each time the account's credentials are passed out, they can be used and then effectively locked thereafter.

## Privacy settings

By default, in SharePoint Online, a user's My Site is public, even though the interface says it is private by default. If you leave the Make My Sites Public check box selected, that user's My Sites become public to the other users in the organization. When you deselect this check box, some elements of the user's My Site are no longer shared on an automatic basis, such as the following:

- User's list of followers
- Information about who that user is following
- User's activities

When the check box is selected, user activities automatically become public, such as the following ones:

- New follow notifications
- Tagging of content, rating of content, or both
- Birthdays (if populated)
- Job title changes
- New blog posts

If these activities (and others) are made public, users can still override the default settings as long as they are allowed to manage their own privacy settings within their user profile.

What choices you make here is less a governance question than it is a cultural/collaboration question. The risks posed by opening this up are that users might unwittingly post information or activities in their newsfeed they don't want going public. But the downside of closing this down is that, in a highly collaborative environment, other technologies will supplant SharePoint Online for certain sharing needs. It seems best to transfer to the user the management of which activities appear in the newsfeed instead of using a one-size-fits-all approach—unless that is what your organization wants.

## Configure trusted-sites locations

The Trusted My Site Host Locations feature prevents a user from creating more than one My Site in an organization with multiple User Profile service applications. It also is a feature in both on-premises and Office 365 deployments, in which it informs the SharePoint environments where a user's My Site and User Profile is located based on Active Directory groups, and, suboptimally, audiences. To enable Trusted Host Locations, simply enter the URL for Office 365 My Sites for a group of users. You can leverage existing Windows Active Directory security groups for targeting.

The URL entered into a trusted-site location becomes a simple redirect in the client web browser. Therefore, there does not need to be connectivity between the server environment running SharePoint Server on-premises and Office 365 as long as the users themselves can access both locations from their client devices.

Multi-user-profile service environments become more complex. For example, in a server farm deployment that spans geographic regions, you might have separate User Profile service applications for each region or regional server farms in the environment. By default, a user can create a different My Site in each User Profile service application or server farm, which could cause unwanted results from both an administration perspective and a user perspective. Where the potential exists for the user to create multiple My Sites, use of the Trusted Sites Locations is needed to ensure the user can work in different farms but will still have only one My Site.

Many hybrid deployments can place the user's My Site in the SharePoint Online environment while leaving other services and applications running in the on-premises deployment.

## Map an account through different membership providers

Federated user identities in Office 365 are prefixed with the membership provider that provides claims-based access. An on-premises user identity of *bill@englishventures.us* might become *i:0#.f|membership|bill@englishventures.us* in Office 365.

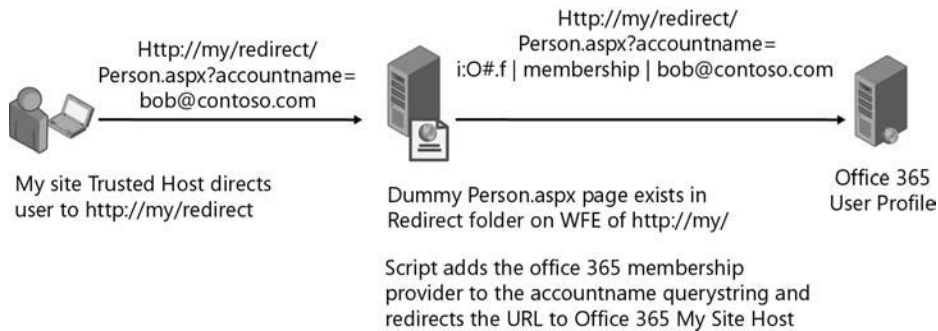
The My Site host uses this identity to display the correct My Site or User Profile by including it in the "accountname" querystring on the User Profile URL. An example, a User Profile URL for an on-premises installation might look as follows:

*<http://my/profile.aspx?accountname=bill@englishventures.us>*

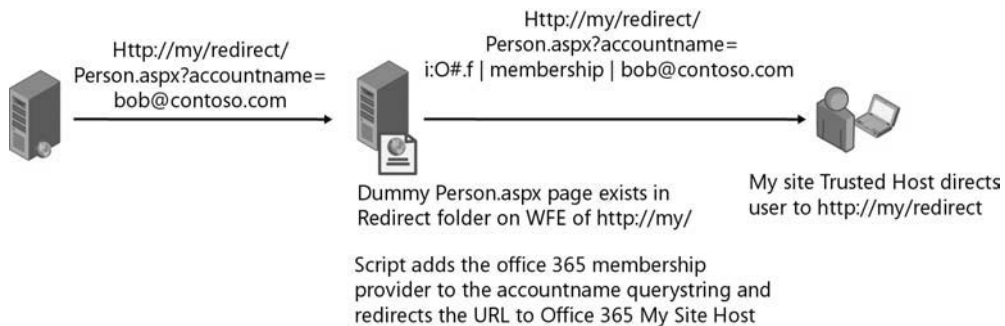
The formatting differences mean that the two environments will not automatically resolve the requested user identity. So a simple workaround for this formatting is to use an ASP.NET page running on the on-premises farm that can resolve the identities and then redirect the request to the real on-premises or Office 365 location. In the preceding example, some string manipulation would be sufficient to remove the *i:0#.f|membership|* part of the user identity so that it could be resolved on-premises or to add it so that it can be resolved by Office 365.

The script can be placed as inline code in a dummy profile.aspx page in a directory on each SharePoint front-end web. Configure the My Site Trusted Host locations to point to the directory that contains the script, rather than the actual destination, and allow the script to perform the redirect.

Suppose a user browsing the on-premises environment requests a user profile that is stored in SharePoint Online. This is the process that will take place:



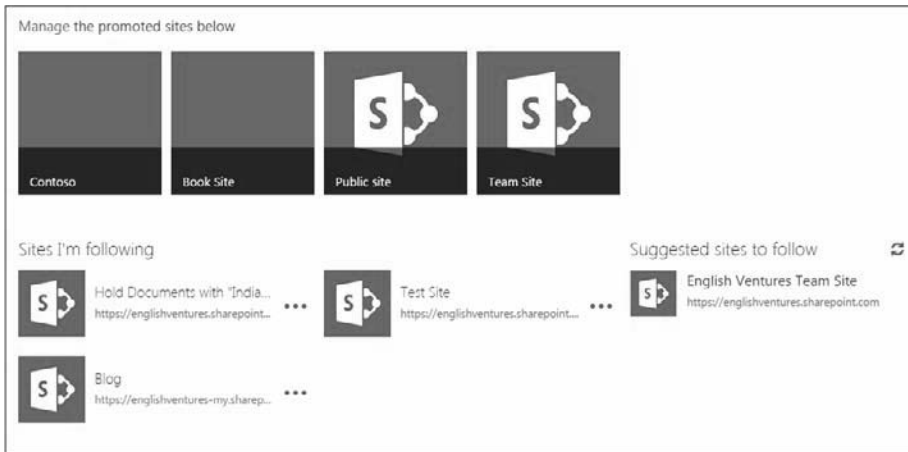
Now, let's suppose a user browsing the SharePoint Online environment requests a user profile that is stored on-premises. This is the process that will take place:



**MORE INFORMATION** If you're in a hybrid environment and would like to access the redirect code with instructions on how to install and use it, visit Summit 7 System's website at [http://summit7systems.com/code/profile\\_redirect](http://summit7systems.com/code/profile_redirect). This code is unsupported, but it will get you started in creating the proper redirects for your hybrid environment.

## Manage promoted sites

You can promote any URL (not just SharePoint sites) to your user's Sites page so that they see the link when they visit the Sites page. (See Figure 2-12.)



**FIGURE 2-12** The Sites page with Contoso as a promoted site

To customize the Sites page, you'll click on the Manage Promoted Sites link under the My Site Settings and then click the New Link link (not illustrated). On the next page (shown in Figure 2-13), you'll fill in the URL, Title, and Owner text boxes and then optionally type a value for the Description box, a URL for the image that will appear with the link on the Sites page, and the target audience (if any). Note that even though the interface does not show it, the owner of the link is a required field, so you'll need to enter an owner for the promoted link to save the entry and promote the link.

 The screenshot shows the 'Managing promoted sites input screen'. At the top left, it says '\* Indicates a required field'. Under the 'Properties' section, there is a note: 'Use audiences to specify if a link should only appear for a specific set of users.' The form contains several input fields: 'URL: \*', 'Title: \*', 'Description:', 'Image URL:', 'Owner:', and 'Target Audiences:'. The 'Owner:' and 'Target Audiences:' fields have small icons to the right of the input boxes.

**FIGURE 2-13** Managing promoted sites input screen (note the lack of an asterisk next to the Owner selection box even though it is a required field)

**NOTE** You'll likely need to work with the rendition size of the graphic so that it fits into the square icon area the way you want it to. The default rendition sizes within the Images library do not automatically fit the icon area, so you'll want to work with a third-party graphics program to get the graphic into the size and density you want before uploading it into SharePoint Online.



From a governance perspective, there isn't much risk here. I would use this feature to promote websites and documents of a global nature to your users. You can think of the Sites page as a type of one-page portal in which you promote certain pages or opportunities. For example, you could promote the summer golf outing or the winter party on the Sites page. You could promote the company-giving campaign to a local charity or community group. Furthermore, you could promote the updating of the human-resources policy manual or a new expense-reimbursement program. This sites page can add real value to your organization. The only real risk is that users might filter out most of the links if they are not of use or interest to them. So, from a governance perspective, I suggest using audiences to refine the interface so that users don't visually filter out unneeded links.

## Publish links to Office client applications

When users are opening or saving documents from their Office client applications, you can ensure their most commonly accessed SharePoint Online sites, libraries, and lists appear in the client interface by publishing certain links from this location. Links published here will show up under the My SharePoints tab. The use of audiences for these links is strongly encouraged. Ironically, there is no owner attached to these links, unlike with a promoted-site link. And you can select the type of object to which you're linking using the Type drop-down list (not illustrated).

I suspect your need to create these links will diminish as users implement OneDrive for Business more pervasively. (See my discussion below in the "OneDrive for Business" section.)

## OneDrive for Business

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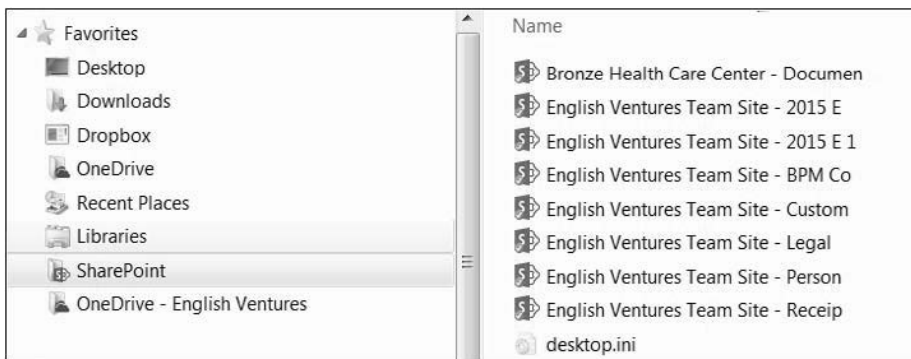
OneDrive for Business is an Office 2013 client that replaces the old SharePoint Workspace by giving you the ability to synchronize document libraries and lists from SharePoint Online to your local hard drive. But it also acts as a client you can use to save directly from your local hard drive to a document library or list sitting in the cloud. At its core, however, it is an evolution of the My Site document library. Essentially, OneDrive for Business is a cloud-based, SharePoint-based document library in which individual business customers can save documents that can be consumed by others in the organization.

The OneDrive for Business client installs with the Office 2013 Pro Plus package on your user's workstation or other device. Your users then invoke OneDrive for Business by clicking on the OneDrive For Business link within the Office 365 menu from your Start/Programs/Office 365 menu selections.

When OneDrive for Business installs, it will be automatically added to your user's Favorites in the File Save-As dialog box of the Office client as well as in Windows Explorer. Any interfaces that borrow the File Save-As information will also include the OneDrive for Business information. From a user's perspective, OneDrive for Business will be named using the name of Office 365 tenant. For example, if your tenant was named *something.onmicrosoft.com*, OneDrive for Business will appear in the various interfaces as *OneDrive – Something*.

Once OneDrive for Business is configured, users can use their My Site document library to store documents. And they will have drag-and-drop, cut-and-paste, and other common document-management functionalities between their Windows Explorer and OneDrive for Business when it is opened using Windows Explorer. It will look and feel like another drive in which they can manage their documents.

OneDrive for Business also works with the synchronization capabilities built in to the document libraries and lists within SharePoint Online. Each time a user synchronizes a document library, it is added to the SharePoint folder in the File Save-As interface as well as Windows Explorer. (See Figure 2-14.) The names are long and not configurable. For example, a synchronized document library named Corporate Documents will appear in the interface as *Something Team Site – Corporate Documents* if it is synchronized from a default site collection (where *Something* is a placeholder for the name of your tenant). New site collections will not take on this naming convention, as illustrated in Figure 2-14. Note also that synchronized libraries do not appear with the OneDrive for Business folder in the interface even though they are managed by the OneDrive for Business client.



**FIGURE 2-14** OneDrive for Business and document libraries interface (illustrating on the right side how some library names are cut off because the combination of the default names)

There are considerable risks with OneDrive for Business. It is nested deeply enough in the more recent Office 365 deployments that it will be difficult to turn off. Hence, it's best to embrace and manage this technology as opposed to attempting to limit it or shut it down, in my opinion. But the risks that I outline here should not be overlooked as you build out your SharePoint Online deployment.

First, by default, the Everyone Group except External Users will have Contribute permissions on each user's OneDrive document library. This is a considerable security risk in that users who don't understand this default setting might copy sensitive information to their OneDrive for Business instance only to find they have widely exposed that information. Training should emphasize the governance rules you set up to mitigate this risk. One governance rule, for example, could be that users are not placed into the group that has My Site capabilities until they have completed both My Site and OneDrive for Business training. (See the section "Manage user profile permissions" earlier in this chapter for more information.)

Second, some users will have the tendency to upload their entire My Documents to OneDrive for Business because of their ability to access their document from multiple clients, such as iPads or Android devices. This can be a real support issue because of the speed at which documents are synchronized. In my own testing, I found that it took *days* to copy nearly 20,000 documents to my OneDrive for Business library. Although faster bandwidth will help, you should not be under any illusions as to how long this will take and the amount of bandwidth that will be consumed. One governance idea to reduce the risk of consuming too much bandwidth is to have people synchronize only a portion of their My Documents in a single administrative activity—say, no more than 1000 or 2000 documents—and to run that process during night or weekend hours, presumably when you have more available bandwidth.

Third, users might want to use document libraries like file servers, because document libraries can be more accessible from the cloud than file servers are from the Internet. The thought will be this: “Since we can synchronize file servers to the cloud, we can make those files more accessible than before.” Although that sounds logical, simply grabbing the files on a file server and copying (or synchronizing) them to a document library is not a good idea. Most file servers have old, outdated, and redundant documents. Before your users upload entire sets of documents from a file server, you should require a file server “cleaning out” project to remove old, outdated, and redundant files from the file server. The risk of not reorganizing files on a file server and not scrubbing the system of unneeded files is that whatever misery and loss of efficiencies you’re currently experiencing with your file servers will be transferred to your Office 365 tenant. This transfer of problems will artificially increase your tenant costs and do nothing to introduce efficiencies into your work processes.

Fourth, at the time of this writing, Office 365 does not have endpoint security solutions or any type of a compliance center. While it is possible today for users to download and take sensitive, company information to their local, personal devices, OneDrive for Business makes it even easier to do this. Once files are copied from the network, they are out of your control, for all practical purposes. One idea on governing the downloading of company documents onto personal devices is to require personal devices be set up to work with your company’s rights-management solution. So at least there would be some enforced privacy on certain documents even when they are copied off network to a personal device. This isn’t a solution that will always work, but it is one idea to work with. Another governance idea is to purchase third-party software that inputs a watermark onto downloaded documents that contains security warnings and other needed information.

Last, the introduction of OneDrive for Business is likely to contribute to confusion at the desktop as users wonder where they should be storing which files. The solution to this problem depends on your Enterprise Content Management (ECM) architecture—understand what your major “buckets” of information are, which platforms are used to host and manage those buckets, and how your processes use information for both inputs and outputs. As Office 365 is rolled out, it’s best to take the time to define when users should use file servers, document libraries, OneDrive for Business, My Documents, and so forth and to define, at least

in broad terms, what documents should be hosted within which technology. Lower overhead costs come from the standardization of processes, not their randomization. OneDrive for Business and Office 365 might introduce ECM randomization if it is not properly managed, and that will drive up overhead costs.

## Summary

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In this chapter, I introduced the management of user profiles and discussed the usefulness of these profiles for finding experience and expertise within your organization. We looked at how to create new user profiles and why you might want to create user subtypes to make unique profiles or different profile types in your environment. We discussed organization profiles and how to set up My Sites.

I have not delved into the client side of My Sites; instead, I have focused on the server administration aspects of getting My Sites going in your deployment.

In the next chapter, we'll consider Business Connectivity Services and how they can help your Office 365 deployment aggregate data to increase collaboration and productivity.

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# About the author

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