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Out-of-the-Box Thinking for SharePoint Mobility

Part 1: Information Workers

Dan Holme
Office 365 MVP
CEO & Co-Founder
IT Unity

Todd Baginski
SharePoint MVP
VP, SharePoint & Mobility
Canviz Consulting

Barry Jinks
President, CEO & Founder
Colligo

Mobile Access is Not Easy with SharePoint

Today, mobility means not just the type of device you are using, but the way you are working.

In this four-part series of mobile worker scenarios, our goal is to help you understand what you can achieve out of the box with OneDrive for Business, SharePoint and Office 365, and where you may need third-party solutions to create secure, yet user-friendly access to mobile and offline content.

When we look at the mobile experience in SharePoint, OneDrive for Business and Office 365, the out-of-the-box scenarios don't necessarily give mobile workers the richest and most user-friendly experience possible. Getting to a document library to open, edit and save a document in a browser on a device can be a difficult task. It's even tougher when you try to work offline as many of the mobile access points in SharePoint assume you are connected to your environment.

"Mobility is about professionals who work remotely, who need access to content in distant, sometimes poorly or disconnected locations, and who collaborate with other parties, not just within their organization, but outside their organization as well."

Dan Holme
Office 365 MVP

A 2015 AIIM study highlights the mobile experience in SharePoint, OneDrive for Business and Office 365:

35% of respondents reported frustrations with the lack of mobile support in SharePoint and the difficulties of getting external access.

20% are concerned that the frustration with the SharePoint user experience is leading employees to look for easier to use, non-sanctioned services.

To solve this, 12% of the companies surveyed already use a third party tool to gain a better mobile experience for SharePoint, and a further 32% have firm plans to implement a third party solution for their mobile workforce within 12-18 months.

The Information Worker Expects Anywhere, Anytime Access

Information workers need to be productive anywhere through secure access to enterprise content across devices and connections.

A few years ago mobility was an investment reserved for senior executives and sales representatives, but today, information workers are mobile. They use all kinds of mobile devices for leisure and for work. They want to stay connected to the enterprise, their files and their peers. Work no longer stops when they leave their desks. They demand access to their content from home, when they're travelling, at lunch and at offsite meetings or conferences. Simply put, mobility needs to support work anywhere, anytime and on any device.

For enterprises this is a huge shift in IT support. The transformation from desk workers to mobile workers brings a whole new set of user requirements.

Mobile worker requirements:

A single source of truth on multiple devices
The ability to access the same content on multiple devices with content looking uniform across desktops and devices.

A simple user experience
Intuitive and easy to access and work with the content on any device – online and offline.

A platform that can be controlled
A set of applications that are sanctioned enterprise-wide, where all content can be managed centrally.

Governance
A secure system that allows the enterprise to govern the content and the devices from which that content is accessed.

> *"We've got a requirement for a platform where the enterprise can manage critical information, and have a way for users to access that information that's adoptable, so that users don't go around to non-sanctioned systems. That platform, and that access, needs to be available anywhere on multiple devices and needs to be a smooth user experience that's not jarring -- how users access content on their desktop should transition smoothly to their tablet, to their phone, etc. Of course, the assumption is that users need to have - in many scenarios - access to that information offline."*

Dan Holme
Office 365 MVP
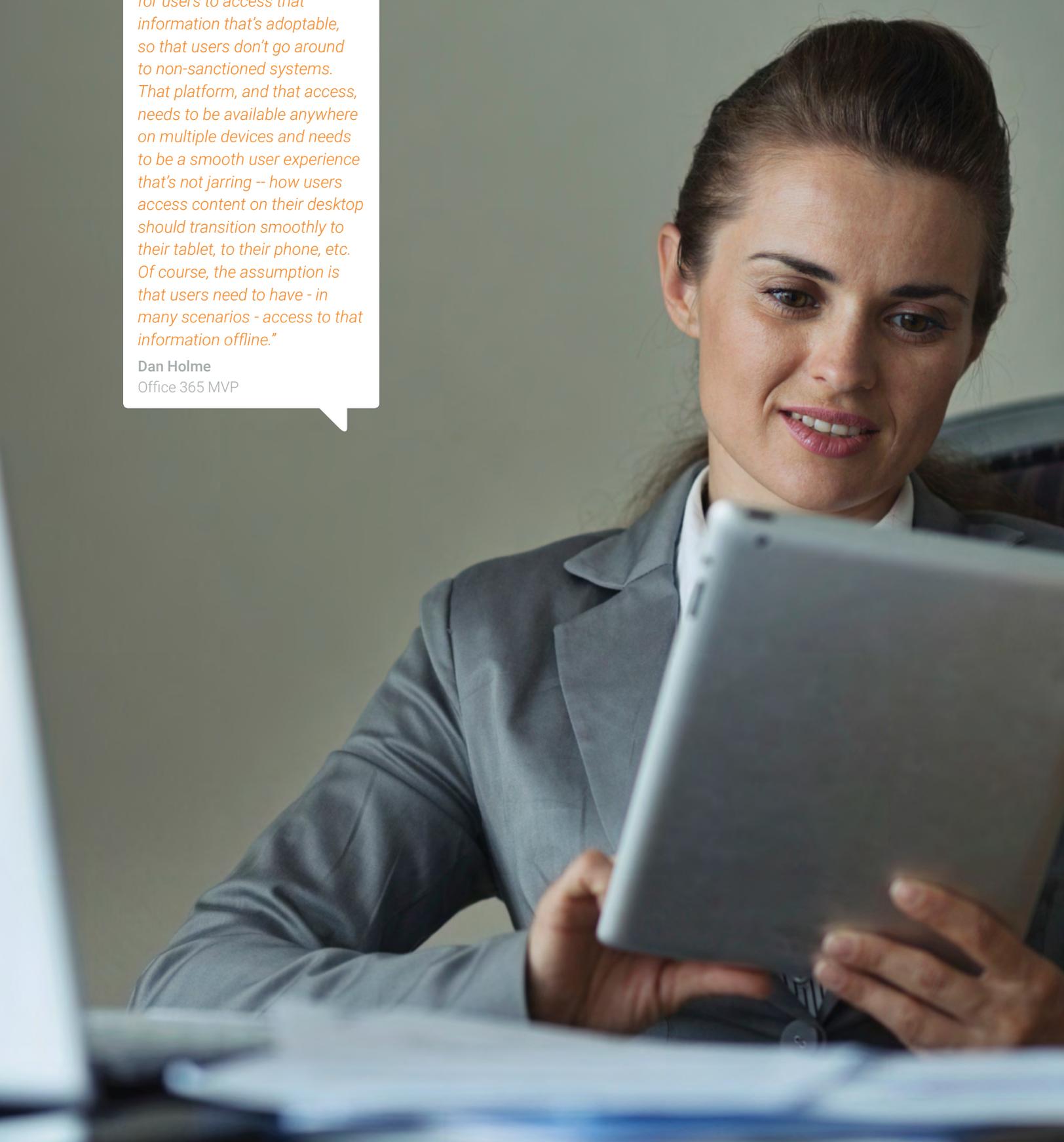
Out-of-the-Box Solutions

We're going to look at three broad categories of experiences, capabilities and functions available in out-of-the-box SharePoint:

OneDrive for Business   SharePoint Sites   Office 365 Groups

OneDrive for Business

OneDrive
for Business

OneDrive for Business is the primary location for a user's documents in SharePoint and Office 365. It gives a user access to files from any device and the ability to share files with others.

Users can access OneDrive for Business from any device using a browser. From the OneDrive for Business site, they can add files, create new Office documents, see document previews, and open documents for viewing or editing. The OneDrive for Business site provides a nice, rich experience with users' files.

On devices—particularly iOS and Android devices—the primary mobile experience with OneDrive for Business is through the OneDrive app. Users have, at first glance, a similar experience with their files. So it is easy to get to files stored in OneDrive for Business from any computer or device, and to open documents in the Office mobile apps.

However, for users who want more, the experience is limited. While you can upload an existing document, you cannot create an entirely new document within the app. The app doesn't offer previews before a document is opened. And some of the advanced sharing controls available on the browser are not available in the app.

The biggest challenge for mobility with OneDrive for Business is offline access. Users who want to work with documents on a mobile device while disconnected must open each file that they want offline, before they actually go offline. Later in 2015, the app will support marking individual files offline. Making entire folders available offline is somewhere on the horizon. Right now, it's just not easy to ensure the files you need are there when you're disconnected.

The user experience is also a bit rough. When a user opens a file offline, they are notified that they must be connected to the server—as if there is a problem working offline—but the Office mobile app does allow edits to be made, which are synced back to OneDrive for Business when the user is connected. Microsoft will be improving the experience, but it is currently rough, at best.

What's the experience like for the enterprise? An immediate red flag for organizations is that there is no way to secure documents in the OneDrive app on a user's mobile device. A document is cached securely within the encrypted data store of the app, but it can be shared to other non-sanctioned apps, including email. At that time, the document is of course no longer secure. You can add information rights management features to address these concerns, but that requires the most expensive licenses to Office 365, and is quite challenging to implement for on-premises SharePoint environments.

"From a mobile OneDrive for Business perspective, there is no easy way to see whether files are offline or not. You can see properties of files to a point... you can see, open and send documents, so you're really capturing that information out of this application. The content here is very much limited to what you're getting through a nice, glossy web experience."

Barry Jinks
President, CEO & Founder, Colligo

SharePoint Sites

SharePoint

> A SharePoint team site supports collaboration on documents, tasks, contacts, calendars and other lists.

Teams and projects often require users to collaborate around documents, tasks, contacts, calendars and other types of lists. SharePoint team sites support feature-rich collaboration, through a desktop browser.

On a computer, users can sync documents in a SharePoint library for offline access. The experience and the result is very similar to OneDrive for Business, and the underlying sync engine is the same.

But as soon as the user is mobile, the story gets much more complicated. At this point in time, SharePoint libraries are not exposed in the OneDrive app, so there is no access to documents stored in libraries—offline or online. This capability is promised for the future, as Microsoft unifies the file store, share and sync experience across OneDrive (the consumer service), OneDrive for Business and SharePoint libraries.

Because there is no app support for SharePoint libraries, users are forced to work within the browser. On smaller-screened devices, the browser exposes the team site using the "contemporary mobile view" as Microsoft calls it. The mobile view is more touch-friendly than the native desktop browser experience.

The mobile view loses access to some of SharePoint's rich functionality along the way. Be certain to evaluate the mobile view for suitability to your use cases. Pay particular attention to how security, metadata, workflows, document approval and version history are, or are not, exposed. There is also no way to customize the mobile view.

The browser-based mobile experience leaves much to be desired when a user wants to preview, view, open and edit a document. And, perhaps the most significant problem: the browser-based mobile experience provides zero support for offline access to files, tasks, calendars, contacts and other lists on a SharePoint team site.

For use cases in which governance and security matter, the limitations of the mobile SharePoint team site experience can cause some challenges. When users can't access documents and data to achieve their job tasks while on a mobile device, on a slow connection, or offline, they will work around the limitations of SharePoint and turn to other solutions and cloud services that are, in most cases, not sanctioned by the enterprise.

Most organizations have seen users email important and sensitive information to their personal, home email accounts to access those documents offline. Users move work into other services like Dropbox or Google. As soon as that information is out of the sanctioned enterprise service, data leakage and data loss risk is assumed by the organization.

Office 365 Groups

Office 365

> Office 365 Groups provide a modern experience for team collaboration that leverages capabilities from across Office 365.

Microsoft recently introduced a new element in Office 365: Groups. Groups allow an organization, department, team or project to collaborate effectively in a modern, mobile-first experience.

Groups are the glue that binds functionality and experiences from across the Office 365 service portfolio. Within a group, users can:

- **Store, share and sync files** which are serviced by a document library in a hidden SharePoint site collection
- **Carry on conversations** powered by a behind-the-scenes shared inbox on Exchange Online
- **Manage a shared calendar** also powered by Exchange
- **Take meeting notes and collaborate** in a group-specific OneNote notebook
- **Manage tasks and projects** with the newly-announced Planner, which will appear in Q4 2015

Users can also interact with Groups, their files, conversations, and notes within Outlook 2016 and Outlook online. From a group's site, using a browser, you can sync group files for offline access on a desktop or laptop computer.

The mobile experience for groups is delivered by the Outlook Groups app, which was released in late September. The new app provides rudimentary but effective access to all of the Group functionality, including notifications for changes.

Within the Groups app, files are presented similarly to the OneDrive app, but there is absolutely no support for offline access, yet. That will certainly change over time, subject to the same roadmap and limitations we've discussed earlier.

> *"Groups is simply a new metaphor for collaborating that is going to pull together the capabilities across the Office 365 suite, including OneDrive for Business.*
>
> **Todd Baginski**
> SharePoint MVP

Mobile Requirements Checklist
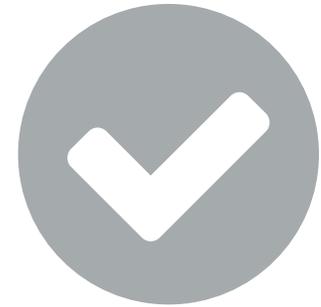
Taking a broader view of the requirements we've introduced in the mobile information worker scenario, here is a checklist to use as a shortcut to evaluating and prioritizing your mobility needs.

Mobile Requirements Checklist

Mobility
- When needed
- Across devices
- Where needed
- Low speed/latency
- Offline
- Secure

User experience
- Easy: "discoverable"
- Integrated: "native"

Content requirements
- Documents
- Contacts
- Calendars
- Tasks
- Lists
- Forms
- Media
- Business data
- Business intelligence
- Conversations

Enterprise content
- Information architecture
- Findability

Adoption & usage
- Measurable

Governance
- Access control
- Rights management
- Records management
- Auditing
- Reporting
- E-Discovery
- Supportability

Mobility
First, you need to think about mobility itself. Where and when is the content needed? Is it needed across multiple devices? In what kinds of locations do employees need to reach their content? Do these locations have low speed or latency problems? Do you need offline access to the content? What requirements do you have for mobile security?

User experience
How easy, or discoverable, does the experience need to be for your users? How native does it need to feel?

Content
What do users need to have access to? Take into consideration documents, other content, calendars, tasks, lists, forms, media, business data, business intelligence that makes sense of that data, and conversations with peers and customers. Is there a need for information architecture? What are the taxonomy requirements, and how are you going to make that content findable?

Adoption
How are you going to drive adoption of the solution? How are you going to measure it? How are you going to know that people are using the solution you've built and not bypassing IT in favour of rogue solutions on unsanctioned platforms?

Governance
How are you going to govern the solution as a whole? How are you going to manage access and permissions? Do you need to apply information rights management? Do you need to preserve content as records? What kind of auditing, reporting and insight do you need? If you ever get a legal action that surrounds this particular use case, are you going to need to support it with e-discovery?

Support
If you're going to deploy a mobile solution, what happens if something goes wrong? What level of support do you need from Office 365 or a third-party vendor?

Configure, Build or Buy?
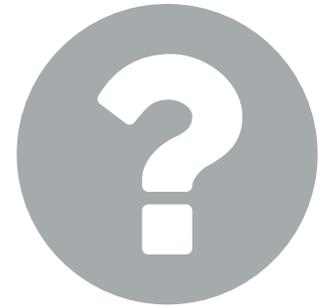
The best way to evaluate your needs for enterprise mobility is to consider the requirements in the context of each group of content and examine them across your requirements – do you need to configure the platform, build your own extension or buy a third-party solution? For example, if you need offline access to documents, can you configure your current solution, will you need to build an extension to achieve caching of documents or should you buy a third-party solution?

The below mobile requirements matrix is a starting point for you to evaluate your organization's requirements.

Content types	Mobility						User Experience		Enterprise Content		Adoption & Usage	Information Governance					
	When needed	Across devices	Where needed	Low speed/latency	Offline	Secure	Easy: "discoverable"	Integrated: "native"	Information architecture	Findability	Measurable	Access control	Rights management	Records management	Auditing	Reporting	E-Discovery
Documents																	
Contacts																	
Calendars																	
Tasks																	
Lists																	
Forms																	
Media																	
Business Data																	
Business Intelligence																	
Conversations																	

Choose a content type from the left column and score the top row requirements from 0 to 5, with 5 being a top priority.

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Colligo helps organizations accelerate SharePoint/Office 365 adoption for content filing and sharing.

Our Colligo Engage platform includes highly engaging 'native' apps, multi-system sync technology and a management console. Colligo solutions are deployed in F500 enterprises and thousands of organizations of all types to increase productivity, support mobility and mitigate risk.

Colligo Engage
Management Console

Colligo Engage
Apps

Colligo
Engage
Sync

OneDrive
for Business

Office 365
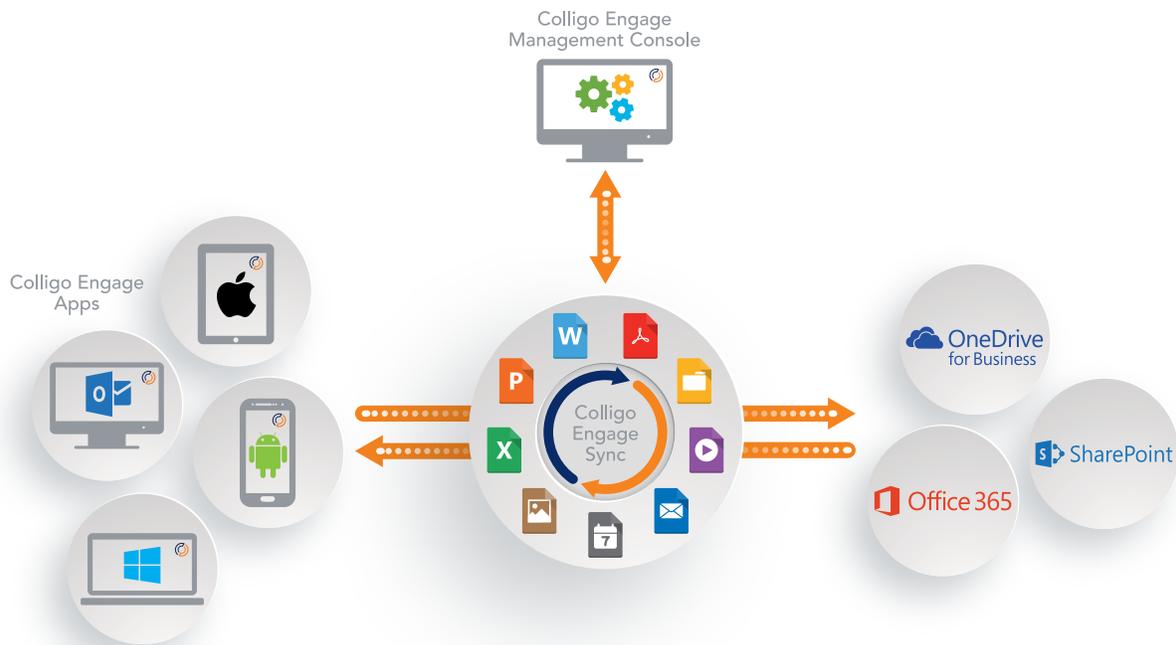
SharePoint

Next Steps

You've invested time and money to deploy SharePoint. Now is the time to fully leverage your system for the unique business scenarios of your mobile users. Take this opportunity to do it right!

www.colligo.com/request-demo-form/

Meet the Authors

Dan Holme
Office 365 MVP | CEO & Co-Founder, IT Unity

Dan Holme's 20 years of experience and his impact on hundreds of thousands of IT professionals and business decision makers have earned him a reputation as one of the world's most respected analysts, consultants, authors and experts on Microsoft technologies. A native of Colorado, resident of Maui and graduate of Yale, Dan has been recognized as an MVP for nine years across three technologies, and is one of the top ten partner MVPs in the world. Dan has penned hundreds of articles for SharePointProMag.com and numerous best-selling books for Microsoft Press. Dan also serves as the Microsoft Technologies Consultant for NBC Olympics.
www.itunity.com

Todd Baginski
SharePoint MVP | VP, SharePoint & Mobility, Canviz Consulting

Todd is a ten-time Microsoft SharePoint Server MVP and a SharePoint Top 25 Influencer who specializes in Microsoft SharePoint, Office 365, Azure, Mobile, Office and cloud technologies. Todd is the VP of SharePoint and Mobility at Canviz Consulting where he leads the SharePoint and Mobility divisions. In his free time, he enjoys playing with his son, relaxing with his wife, and playing a variety of sports like skiing, lacrosse, hockey, football, and softball.
www.canviz.com

Barry Jinks
President, CEO & Founder, Colligo

Barry is the founder and CEO of Colligo, and has been a technology innovator and entrepreneur for over 25 years. Barry is a recognized expert on SharePoint client technology and a frequent speaker at SharePoint and Enterprise Content Management (ECM) conferences worldwide. He manages Colligo's popular SharePoint blog, which discusses important issues in email and records management, governance and compliance, as well as technology trends affecting the SharePoint and ECM market. Barry holds degrees in Science and Electrical Engineering and was named Ernst and Young's 1997 Pacific Region 'Entrepreneur of the Year' for Technology.
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