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With workflow improvements in SharePoint 2013, more companies may consider it. Here's what else to consider in Microsoft's latest version.

I'm a SharePoint conference veteran. I've attended each once since they officially started in 2008, including the most recent one late last year in Las Vegas. What's new among attendees now is a certain maturation about where SharePoint works well and where it doesn't.

SharePoint zealots are getting smarter about the platform's malleability and also about when not to use it for certain applications. For example, we're seeing more companies use the platform for public-facing websites, contract life-cycle management, case management, accounts payable repositories and human resource portals for on- and off-boarding of employees.

On the flip side, savvy SharePoint vets recognize that it isn't very good in supporting transactional applications such as inventory management, warehouse operations and general ledger applications. In those cases, SharePoint may serve as a portal into those systems. Microsoft has a new partner program called "Business-Critical SharePoint" aimed at getting it deeply integrated with line-of-business systems such as SAP, Oracle Financials, Salesforce.com and other transactional systems.

As IT leaders think about their SharePoint strategy, here's a look at the most important changes in SharePoint 2013, broken down by the most likely benefit to line of business teams, end users and the IT organization.

### **Line of Business**

*Compliance.* One of the key new features in SharePoint 2013 is the e-discovery capability, which allows for more extensive searching and better legal holds of content inside and outside of SharePoint. For example, SharePoint's e-discovery now allows for legal holds to be placed on content that resides in users' Exchange mailboxes, file systems and other locations. In the past, this information couldn't be locked down. This information can then be exported for e-discovery purposes. Additionally, SharePoint 2013 now has the ability to lock down a site rather than just the content in a site through Site Policies.

*Collaboration.* This version offers improved people-finding and better ability to share content and links and to track activity based on people or content. A big change will be when Microsoft incorporates its newly acquired Yammer functionality. Its roadmap for Yammer includes single sign-on and more document management and activity features.

*The Cloud.* Microsoft stepped into the cloud a few years ago by offering SharePoint through Business Productivity Online Suite (BPOS). SharePoint 2013 offers a simpler approach. Cloud-based SharePoint can help with collaboration sites accessed by employees as well as external people, such as suppliers.

## **End Users**

*Improved Website Management.* Though many organizations use SharePoint 2010 for public-facing websites, it is rather clunky in terms of page rendering, navigation and search engine optimization. Improvements in SharePoint 2013 include letting Web teams more easily create readable URLs (such as [www.microsoft.com/sharepoint](http://www.microsoft.com/sharepoint)), incorporate search engine optimization tags directly into the configuration (without XML or coding) and supporting catalog management. Microsoft now also allows third-party software to be used for design layout.

*Work Management Services.* Those familiar with workflow management in SharePoint are painfully aware of the distributed collection of task lists that pervade the product. SharePoint is composed of sites, and each site typically has a task list associated with it. But seeing a consolidated list of all tasks across all sites has required custom coding or third-party utilities. SharePoint 2013 creates one place to go for task assignments for a user to take action on a particular document or report.

*Improved Mobile Support.* SharePoint 2013 improves capabilities for device channels, push notifications, HTML 5 support and in general has a more polished and less painful experience for the mobile workforce. For example, in prior versions, users could not edit or add documents from a mobile device; these functions are now available.

## **The IT Organization**

*Apps.* Microsoft has at last immersed itself in the app model with SharePoint 2013. Apps in this context are add-on components that work outside of the SharePoint farm, with an integration link that binds the app to that instance of SharePoint. For example, an advanced document comparison service for AutoCAD files could be created in a marketplace. The app could be installed into the SharePoint farm. Once implemented a user could then highlight multiple documents in a SharePoint document library. These could then be sent to the marketplace app for comparison, and the compared AutoCAD file could be sent back directly into SharePoint.

Microsoft has launched an App Marketplace that app developers can use, or they can offer apps that reside on their own servers. It is important to note that IT will sometimes need to run a blended system, where part of the code is running on an external app and part on the SharePoint farm. For example, Timer Jobs and Service Applications within a SharePoint farm

cannot be redirected to an app, so applications that require such capabilities will require a blended system.

*Claims-based Authentication.* SharePoint 2013 offers OOTB Claims Authentication using Open Authorization 2.0 (OAuth). OAuth is an industry-standard security protocol that provides temporary redirection-based authentication. This means that SharePoint 2013 will let users give apps access to SharePoint resources (sites, lists, items, etc.) without the app having to obtain, store or submit the users' credentials. This allows for improved authentication between server-to-server and app authentication.

This differs from the default Active Directory (AD) authentication model and will be the default authentication model going forward. In the AutoCAD file-comparison app example cited above, the app would be able to take the files for comparison and insert the compared file back into the document library without having to use or verify the user's credentials.

OAuth allows for different credentialing systems to be integrated more easily into SharePoint. For example, if OAuth credentials are established with Live ID accounts, this could be used for authentication purposes in SharePoint. Because these features are so new, it is recommended that your IT team gets up to speed on the capabilities of OAuth 2.0 and what it means in the world of SharePoint.

*Search.* Microsoft has embedded FAST search into SharePoint 2013. In prior versions, FAST was a secondary search engine that had to be purchased. With the combined SharePoint search and FAST search architecture, new capabilities include the ability for visual refiners to more quickly get to the right results, and a new "hover panel" that shows details about a file when a cursor is over it.

*Workflow.* Features such as support for calls to Web services, REST, visual workflow design, looping and the calling of other workflows are among the improvements that weren't supported in prior versions. That meant SharePoint-based workflow would often require Visual Studio development or third-party workflow products.

These new features mean more workflow operations can be performed by non-technical business analysts and power users. Under the covers, Microsoft introduced a new workflow platform for SharePoint 2013 that can work in parallel with SharePoint 2010 workflows. The new platform, built on top of .NET Framework 4.5, is substantially improved and includes a Workflow Manager for better orchestration across a company. These capabilities should let companies use workflow for more advanced processing such as case management and human resource on- and off-boarding, with integration to third-party service bureaus and other more complex requirements.

So who should consider SharePoint 2013, and who should avoid it? Walton Smith of Booz Allen & Hamilton, a speaker at SPC 2012, offered these three practical guidelines:

- Companies using SP 2001 or 2003 won't be ready for 2013 and will need more time to prepare for the changes.
- SP 2007 users should bypass SP 2010 and jump to SP 2013.
- SP 2010 users need a compelling, appropriate use case to justify an immediate upgrade. Smith also recommends introducing some SharePoint 2013 features using the cloud-based option, which is less risky than doing a big quick upgrade.

SharePoint was once seen as not much more than a simple team collaboration site. Those days are gone, and more companies will use SharePoint for true business-critical applications. Law firms such as Clifford Chance are heavily leveraging SharePoint, Merck relies upon SharePoint for business planning and United Airlines uses it in a strategic capacity for procurement. Over the next two years, we'll see a collection of success (and horror) stories coming from the masses, so make sure to take controlled and managed steps in implementing SharePoint 2013.

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