

Technical prerequisites

Fresh

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FRESH

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1 Summary of Office 365/Azure requirements for Fresh

Fresh is deployed as part of SharePoint Online in Office 365 and uses Azure for some optional modules like the provisioning of content and collaboration sites and pages. When Fresh is deployed, no existing sites are affected, and changes done in the term store will not affect existing solutions.

In the following sections we have specified the technical prerequisites that need to be in place before the solution can be deployed. We have also specified the access requirements required for deployment and configuration.

1.1 Office 365

The Client shall ensure they have an Office 365 Tenant and subscription as a prerequisite for Fresh

- Fresh is compatible with all Office 365 Enterprise plans (E1, E3 and E5) including the Firstline worker plan (F1).
- Fresh can be used with a standalone SharePoint plan (SharePoint P1), although functionality related to other areas of Office 365 will not be present (e.g. Integration with Office 365 calendar items, contacts, Microsoft Teams, Planner, Stream etc.)
- [Optional] - use of the Office 365 public/private CDN, or an alternative CDN
 - NOTE – CDN use is not mandatory. Where a CDN is not configured, Office 365 serves files directly from the Office 365 tenant instead.

1.1.1 SharePoint Online

The Client shall ensure that the following can be provisioned in SharePoint Online (using the deployment account described below):

- Taxonomy Term Sets into the SharePoint Term Store (Managed Metadata Service).
- Search configuration/schema items (e.g. managed properties).
- Custom User Profile properties.
- The ability to deploy app packages to the tenant App Catalog.

To be able to show data from other applications in Office 365 (Calendar, Planner, etc), some web parts needs permission to obtain this data on behalf of the user in Office 365. Of course, the usage is simply the individual user read-only accessing their own data. Granting the required consent does not mean that one user can access another's data. The exception to read-only access is the use of ChannelMessage.Send – this permission is required to be able to share a piece of content in Teams. This permission does not need to be granted if sharing in Teams is disabled.

1.1.2 Power Platform

If the Fresh Provisioning module is deployed, it will need at least one Power Automate “per user plan” license (priced at £10/€13/\$15 per month at the time of writing)

- This should be assigned to the account which will own the site provisioning Flow (see the Accounts section).

1.2 Azure

Fresh has 5 optional modules that requires resources in Azure:

- a. Provisioning module: enables to users to request the provisioning of Fresh custom pages and sites.
- b. Translation module: automatic translation of the content of the pages.
- c. Web analytics module: collects information about the page views.
- d. Share prices that get information from Investis.
- e. Action checklist: list of actions that the employees should complete. The stats (who has done every action and who is left) are accessible for administrator.

If any of these 5 modules are deployed the Client shall ensure they have a fully enabled Azure subscription enabled. The subscription should be capable of running:

NOTE - the Azure subscription must be the one which provides the Azure AD for the production Office 365 tenancy.

These are the resources that every module requires:

- a. Provisioning module
 - App service
 - Storage account (Queues and File shares)
 - AD application registrations
- b. Translation module
 - Cognitive Services / Translator Text
- c. Web analytics module
 - Application Insights
 - Storage account (File shares) - optional
 - Stream Analytics job (£80/month at the time of writing) - optional
 - SQL server - optional
 - SQL database - optional
- d. Share prices:
 - App service
 - Storage account (File shares)
 - AD application registrations
- e. Action checklist
 - App service
 - Storage account (File shares and tables)
 - AD application registrations

1.3 Deployment prerequisites

- The deployment scripts should run in a computer using Windows 10.
- The accounts have been created as per the recommendations in 1.4 below.
- The Office 365 tenancy has been provisioned.
- User identity and access has been completed for Office 365.
- Access to the Office 365 tenant app catalogue.
- **[Optional]** Yammer Enterprise has been enabled. If used, Office 365 identities must be used (as opposed the legacy/independent Yammer identity model that was originally available).
- **[Optional]** If user profile data should be synchronised from another system, that this synchronisation solution is planned or in place.
- If the computer is using a VPN and a module that uses Azure is going to be deployed, we recommend disabling the VPN during the deployment.

1.4 Accounts

1.4.1 Deployment account

It is recommended to create a dedicated deployment account following these steps:

- Create a cloud-only account on the *onmicrosoft* domain associated with the tenant.
- Do not assign a licence.
- Configure the account as a **SharePoint administrator**. This is provided by either of following administrator roles:
 - 'Global administrator'.
 - 'Customized administrator' with 'SharePoint administrator' rights.

['Office 365 admin center' > USERS > Active Users > *select a user* > EDIT USER ROLES]

- Configure the account as a **term store administrator**.
['Office 365 admin center' > ADMIN CENTERS > SharePoint > term store > Term Store Administrators].
- Configure the account to have **English** as primary language.
['About me' > 'Update profile' > 'Additional information' > 'Edit' > '...' > 'Language and Region'].
- Configure the account as App Catalog site collection administrator.
['App catalog' > 'Site settings' > 'Site collection administrators'].
- If deploying some of the modules that require Azure, grant **"Contribute"** permissions on the Azure subscription.

Once deployment is complete disable sign-on for the account.

After the account is configured, it will be able to:

- Be able to use remote PowerShell scripts
- Be able to provision the items listed in the "SharePoint Online" section of this document (e.g. SharePoint Term Sets into the taxonomy store, SPFx app packages into the tenant App Catalog etc.)
- Be able to provision the Azure resources listed in the "Azure" section of this document (e.g. Azure Functions, Queues and app registrations etc.). This can be enabled by either of the two following options:
 - Granting "Contribute" Permissions on the Azure subscription
 - Creating a dedicated Resource Group for Fresh and then granting "Owner" permissions on the Resource Group.

1.4.2 Power Automate (Flow) account.

If the Provisioning module is deployed, it is recommended to have a dedicated Power Automate (Flow) account that will own the provisioning Flow.

- Assign a "Power Automate per user plan" license to this user (£11.30 per user/month).
- Assign a license that provides Outlook because the flow needs to send emails.

1.4.3 Other accounts

A "Global Admin" user will need to approve the SharePoint API permission requests that some webparts need.

A "Global Admin" user will need to grant **admin consent** for the permission that the Provisioning app registration needs.

1.4.4 Configuration support account

As part of the implementation project, a consultant will support the configuration of the solution following deployment to the production tenant. As a minimum requirement, the consultant will require Site collection admin access on the deployed site collections and term store administrator access for the Fresh parts of the term store.

- Create a cloud-only account on the *onmicrosoft* domain associated with the tenant
- Assign a minimum of E1 license
- Configure the account as a Site collection admin on the deployed site collections and term store administrator for Fresh

1.5 Environment recommendations

Content and Code recommends that a separate **Pre-Production Tenant** is set up as part of the pre-project activities. The tenant should be set up with the same configuration as the production tenant and only requires a few users with limited licenses. Note that we do not recommend to re-use the

production accounts here because they will be guests in this environment and guests have limited functionality, i.e. you could not test all the Fresh features.

This environment will be used to test the deployment of Fresh before deploying to the production environment. The client will get the opportunity to approve any customisations done, for example branding and taxonomy. This tenant can also be used to test configuration of pages and web parts before implementing them in the production tenant.

We also recommend setting up and keeping this tenant live to enable better control during future Fresh updates. The Fresh Product Team will provide updates to the product on a quarterly basis and we recommend all Clients to deploy each release to the pre-production tenant before going ahead with the production deployment.