

# SP Marketplace Product Information and Prerequisites for Installation on Office 365 SharePoint Online



## **How our Products are Built?**

SP Marketplace Products are built as out-of-the-box Power User level solutions on Office 365. Each product is developed as a full application that comes complete with pre-defined business processes, notifications, governance and business intelligence dashboards. We fully take advantage the complete Power Platform using SharePoint, MS Teams, Power Automate (formerly MS Flow) and Power BI.

At the core the products are built out as native SharePoint Online sites using pages, lists and libraries. Governance is designed in using standard Office 365, AD and SharePoint permission groups. All processes are pre-built using Power Automate and dashboards. The only non-native components used are a few SPFx web parts and a SharePoint forms tool.

Using a native development approach enables you to customize the products using the Microsoft Power Platform and supports compatibility with future Microsoft changes to the Office 365 platform.

## **Will SP Marketplace Products impact our existing SharePoint Online environment?**

The answer is no. Our products are natively provisioned SharePoint sites, which means they install in their own site and do not impact the rest of the Office 365 Tenant. Our SP Web Parts are developed using the SharePoint Framework and run just as Microsoft's own web parts do. Also, in most cases you will not need to add any additional storage to your Office 365 tenant to run our products. The only possibility for exceeding base storage is if you populate the libraries with 10s of thousands of large documents.

## **Do I need to add any additional Office 365 licenses for my products to run?**

SP Marketplace portals run on a standard SharePoint Online environment which is available in Office 365 Business, E1-E5 and corresponding G levels as well. We also use the base Power Automate services for process flows. If you wish to use/modify the Power BI dashboard you will need to have one Power BI Pro license (1 user only).

We request that you setup an Administrator license for us to use to install, setup, and support your products. This can be a minimal level license and may be shared with your Office 365 Global Administrator if needed. The specific requirements for this is described in the detail steps later in this document.

Each user who will access SP Marketplace products needs to have an Office 365 user license or be setup as an external user in Office 365. In specific situations (HR applicants, customers, or Sales leads) we do provide web forms to capture information from outside Office 365 (optional).

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## What do I need to setup for my Office 365 environment?

The following is a high-level list of tasks we require to be setup in your Office 365 platform:

- The SharePoint App catalog to add our SPFx Webparts
- For department type products we optionally use a Shared Mailbox for incoming tickets and correspondence. This will need to be created
- Most important we need you to setup an administrator level user id for us to use.

## Prerequisite Setup Details

### 1. Setup an administrator user or provide access to an existing admin user.

- a.* All services are performed remotely online. To do the install, setup, do training and ongoing support we will need access to your Office 365 SharePoint Online environment. We suggest that you create a separate user id for us to use – [SPServices@yourdomain.com](mailto:SPServices@yourdomain.com).

This user will need to have Office 365 **Global Admin** access with free licenses turned on for SharePoint and MS Flow, since we will need to create and install SharePoint site collections, PowerAutomate/MS Flows. If you are planning on using the Power BI dashboards, this user id will need to have a Power BI pro license as well. If you cannot do this or are uncomfortable with this, please talk to your SP Marketplace Services contact.

- b.* *Note: Once we do the install you cannot change the password for this user as it will break connections in Power Automate (Flows) and Power BI.*

### 2. Determine the names of the sites of the products you are having installed

- a.* Each product is installed in its own SharePoint site collection. It has a site name and a URL name. For products like Intranet, HR, IT we use default descriptive names like for SP IT – Site name is IT Support, URL – IT. If you already use these names or want to change them, please identify your changes in the Site configuration section of the **Setup and Configuration Form**.
- b.* If you have our Intranet package which comes with three generic departments, then you will need to decide what you want those modules called. The name of the site can be changed, but the URL once installed should not be changed, or it will break flows. The default for the URLs is /dept1, /dept2, /dept3.

## You said the Products are customizable, what can be changed?

If you are a SharePoint business power user who understands how to change SharePoint lists and pages, you can modify the products to fit your specific requirements. You can add fields to lists, change/add list views and modify site pages. **Please be aware that you need to abide our customization rules as provided in our Customization Guides for each product.** Modifying fields, deleting or changing certain list views could break process flows, dashboards or other underlying product functions which rely on these fields. Also please realize that you may need additional training when changing forms or process flows. We offer our Customer DIY Academy to empower customers to perform their own customizations. Contact your service representative for more information.