Introducing Microsoft SharePoint 2013

ANALYSIS AND COMMENTARY ON THE LATEST VERSION OF MICROSOFT SHAREPOINT, AS ORIGINALLY PUBLISHED ON INTERGEN’S BLOG.
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With a history going back to 2001, SharePoint is now a core part of Microsoft's Office platform, and underpins many of Microsoft's other solutions, including the Microsoft Dynamics ERP and CRM offerings. Microsoft SharePoint 2013 is the latest iteration of Microsoft's enterprise content and web management solution, due for release in late 2012.

SharePoint 2013 is an eagerly awaited new release, building on the solid SharePoint 2010 in a number of key areas, including social, mobility and analytics. In anticipation of this release, Intergen published several posts on its blog, highlighting several new capabilities, while also looking at the impact of SharePoint 2013 from a range of perspectives, including the end user, the developer and consultants.

Published between June and September 2012, these posts were written by our experts in these areas, looking at what’s changed and what’s stayed the same, both of which are equally important to organisations invested in SharePoint and the solutions that rely on it. This information has come from a variety of sources, including mainstream Microsoft and media, the wider SharePoint community and, most importantly, through hands-on experience with SharePoint 2013 on actual customer engagements.

This ebook is a compilation of these posts, bringing the six posts together in a single place so that anyone interested in SharePoint 2013 can quickly get an independent analysis of the latest offering and understand what this platform has to offer.
The next version of SharePoint is here! The beta has just been released and we can expect the final version towards the end of 2012. The new version of SharePoint contains a significant number of improvements in key areas such as mobility, productivity and social, and if you’re considering a new SharePoint deployment or upgrade then you need to be seriously looking at the new version now.

Intergen has already been working with the new version of SharePoint for over six months as part of the early beta programs. This means we’ve already seen it in action in an enterprise setting and can advise you on the best way to move forward with this new technology.

Over the coming weeks, we’ll be publishing a series of blog posts covering the main capability areas of the new SharePoint. In this post we provide a quick summary of the key improvements and their benefits. Feel free to contact us for a more details or to discuss and demo in person.

Key capabilities of Social include:

» Rich micro-blogging with @ and # tags and replies allowing staff to quickly communicate with a small or broad audience.

» A full activity feed allowing users to see all activity in one place and stay in the loop on key events or communications.

» The ability for users to follow people, sites, tags and documents and get updates in their activity feed.

» New Community Sites (think fully-featured discussion boards) with experts, badges and reputation points. Perfect for special interest groups, new staff or general communications and collaboration.

» A richer people search with contact card previews and filtering making it much easier to find staff.

SOCIAL FOR THE ENTERPRISE

Compared with SharePoint 2007, SharePoint 2010 took a big step forward in the Social space, with rich My Sites and some micro-blogging capabilities. The new version of SharePoint goes well beyond 2010 and brings the capabilities of Yammer, Twitter and Linked-In to the enterprise space. The main benefits of these capabilities are information sharing and connectivity between staff in order to reduce silos and speed up knowledge transfer.
MOBILITY

The new version of SharePoint is almost exclusively written in HTML 5 with planned full support for Safari on the iPad. Users can browse, contribute and edit documents directly from iPads. There is also a new Channels capability which allows easy mapping of pages and web parts to devices allowing the experience to be tailored for different devices.

The vast majority of organisations have iPads in their ecosystem and are considering mobile experiences for web content. These capabilities are a huge benefit for mobile access and eliminate the need for complex development and third party apps in a number of cases. We think that native iOS support will be a key driver for organisations considering moving quickly to upgrade from SharePoint 2010 to the new version.

SEARCH

With so many versions to choose from – Foundation, Standard, Express, FAST – search has always been challenging to understand. Now there is only one version of search, and it is amazing! The best capabilities of all products have been combined into one. Think search suggestions, document previews, continuous crawl, recommendations, social distance ranking, deep refinement, auto identification of company names, advanced analytics, even more integration, easy customisation and you are getting close to what the new search provides.

What does all this mean? A highly engaging search experience for end users that provides the fastest, most accurate results ever seen in SharePoint.
Accessing knowledge and collaborating have been cornerstones of SharePoint since 2001. There are a number of improvements in this space which take SharePoint to the next level:

» Users have a folder on their desktop which syncs directly to their My Site. Companies can do away with personal drives and make it easy for staff to store documents within their own space, conforming to templates and enterprise metadata. This is Dropbox level simplicity with the full rich enterprise level control at the back end.

» A new area in My Sites rolls up a user’s tasks across the entire SharePoint environment as well as Project Server and Exchange. This creates a one-stop-shop for users instead of going to tasks lists across the platform. Huge productivity boost!

» There are a number of general user interface improvements such as easy list creation, searching and editing and drag and drop document uploading. You’ll be surprised at how much easier SharePoint is to use and user adoption and training will benefit from these improvements.

» A new Share feature allows users to easily share sites and content with each other rather than dealing with complex permissions.

» There a number of new and well-designed collaboration templates available for use and we’ll be covering these in a later blog post as they deliver great value from SharePoint straight out of the box.

» Access Services has been completely rebuilt and now exists as a stand-alone solution, separate from SharePoint. Access has far more capabilities now than in 2010 for rich forms and reports. Intergen as a company was founded in the era of Microsoft Access applications; we’ll have a special blog post in the next few weeks covering Microsoft Access and Access Services in some detail. If you’re an Enterprise that thinks ‘Access’ is a dirty word then we hope to change your mind for the better!
THE APP STORE

Apps are here in a big way and Microsoft has fully embraced this concept. The new version of SharePoint provides a full-featured enterprise app store allowing staff to access company built, purchased or externally available applications. There are lots of options to control how this works, but essentially you can think of the app store as a highly organised and controlled way to manage add-on features which business areas might want to leverage.

WEBSITES

SharePoint 2010 provided some great functionality for intranet, extranet and public facing websites. The capabilities in the new version have raised the bar and positioned SharePoint well and truly as a leader in the web content management space.

» A new Product Catalogue capability allows site navigation to be defined using metadata. Product pages then aggregate content from a number of sources onto the page using the new Content by Search web part. This powerful capability allows eCommerce and knowledge-based sites to be quickly developed and to adapt over time as product categories and taxonomy changes. Site collection boundaries are no longer an issue for publishing content!

» Digital asset management has greatly improved with much better handling of images and video. For example you can select the thumbnail used for a video just through the browser, display YouTube videos and manage multiple renditions of digital assets.

» Search Engine Optimisation has been implemented with friendly URLs and auto sitemap generation.

» A new Design Manager puts all the branding aspects of the site in one place with the ability to import non-SharePoint HTML from a designer and apply to a site and a much simpler theming engine. Designs can also be easily exported and imported. Overall these capabilities make designing websites much easier.

AND MUCH MORE!

There are many, many more exciting capabilities to talk about in the new version of SharePoint. We haven’t even covered full support for running 2010 sites to allow easy migration, improvements in eDiscovery allowing full search across SharePoint and Exchange with export capabilities, or the fact that versioning now stores only the differences instead of the full document each time.

Stay tuned for the next in-depth blog post – Social!

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Welcome to the second blog post in our series on SharePoint 2013. In this post we’ll be taking a tour of the new Social capabilities. Make sure to check out our Essential Information post if you haven’t done so already, as it provides an overview of everything new in SharePoint 2013.

Microsoft has made some big investments in Social for SharePoint 2013 and has essentially re-built this capability from the ground up. SharePoint 2010 provided My Sites, some basic following options, personal content and micro-blogging but these capabilities were not typically adopted as an integral part of the day-to-day lives of users. With the high adoption of sites such as Yammer, Linked-In, Facebook and Twitter, users and organisations expect to do a lot more with social networking in the workplace and we strongly believe Microsoft has really delivered in the Social space with SharePoint 2013.

Out of the many goals for SharePoint 2013 that we’ve come across, there are two key ones which stand out for Social:

1. Making it easy for users to stay connected to the people and content they care about
2. SharePoint will always contain lots of sites, content and people but users need to easily identify and stay connected to the people and information they care about most.
3. Making it easy for users to discover unexpected people and content to gain knowledge

Knowledge is power, and organisations contain a wealth of information that many users aren’t aware of. Making it easy for users to find different content and people through everyday activities can greatly increase knowledge sharing and productivity.

The social capabilities in SharePoint 2013 support these two goals extremely well. Staying connected to information and people in SharePoint is as easy as ‘one click’ and staying in the loop can be achieved from a central Newsfeed location, requiring no effort by the user. Discovering new content and people also comes naturally, as the social connections users make yield updates on new trends and activities which were difficult to find in previous versions of SharePoint.

THE NEWSFEED

Let’s start our social tour with the SharePoint 2013 Newsfeed. What will probably be the most popular and productive feature in SharePoint 2013, the Newsfeed will be very familiar to anyone who has used a social networking site before. Accessed from any area in SharePoint 2013 via the new global navigation at the top of the page, it provides a series of status updates on activities from across SharePoint that are relevant to the current user:
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The Newsfeed in SharePoint 2013 displays micro-blogs (content specifically posted by a user) as well as updates that are inferred based on what people are doing or what’s happening to documents. The behaviour is quite similar to what you’d expect on a social networking site: users are able to reply and like posts, place in-line SharePoint or YouTube videos and also link to documents – which show up as previews. Users can also choose to “Follow Up” a post, which adds a task to their Tasks area. The new Tasks area aggregates all tasks a user is assigned to from SharePoint, Exchange and Project Server, and will be covered in more detail in our upcoming Productivity blog post.

A number of site templates in SharePoint 2013 also include a Newsfeed which provides micro-blogging for an individual site. In many cases this will replace the need for a team discussion forum. If a user is following a site, they will see that site’s micro-blogs in their central Newsfeed. When they post in their Newsfeed, they can choose to post to Everyone or back to the specific site they have access to. This powerful capability allows users to interact with discussions occurring on multiple teamsites all from one location – their central Newsfeed.

Micro-blogging also supports the @ and # tag. When entering a tag, SharePoint helpfully provides some recommendations for the user to select from. If a user is identified using the @ tag, they will receive a Mention in their Newsfeed, as well as an email.

FOLLOWING

To help the Newsfeed display relevant updates to the user, it leverages a new concept in SharePoint 2013 called Following. A user can follow People, Documents, Sites and Tags. When you follow something, you get relevant updates in your Newsfeed about that item, as well as having a central “favourites” location for quick access. Out of the box, SharePoint 2013 automatically sets your manager, peers and direct reports as people you follow in order to kickstart the social network.

Following is one of the key features in SharePoint 2013 which supports the goal of allowing users to stay connected to the people and content they care about. It also supports the goal of users discovering unexpected people and content. As users connect to other users, they get exposed to more and more content and people as different activities are presented on their Newsfeed.

Clicking Sites on the global navigation displays the list of sites you are following. Whenever you are on a site, there is a small Follow link at the top right of the page. Clicking this adds the site to your Followed Sites list. To un-follow, you just click on the star next to the site name. By default, any site you create will be in your Followed Sites list. The Sites list provides one-click access to a user’s favourite locations across SharePoint.

Following documents is a similar process to following sites. Simply find a document anywhere in SharePoint and select the Follow option from the Ribbon. A link to the document will then appear in the Followed Documents area and any updates to the document will appear in the Newsfeed. SharePoint will also recommend documents (and sites) to the user for following.
Skydrive

SharePoint 2010 provided the ability for users to keep their own files in their My Site and then sync these down to their desktop using the SharePoint Workspace client. While this worked to a certain degree, we found that it wasn't highly adopted in organisations as staff struggled to deal with different security settings, sharing content with peers, and working with documents offline and the overall complexity of 'getting the thing up and running'.

Over the past few years we (and I'm sure many IT departments) have been seeing a whole load of user-driven self-service adoption of Dropbox. Dropbox is a great tool and really shows how to achieve the offline sync story in a seamless and easy to use way. But, Dropbox doesn't deliver the levels of control needed by most mature businesses.

SharePoint 2013 provides a greatly improved document management capability for users called SkyDrive. This provides the sort of end-user-friendly sync capability found in Dropbox, but without sacrificing the enterprise management and security features that are a hallmark of SharePoint. Managing security and sharing of documents is done simply by clicking the icon in the Sharing column and inviting particular users or granting access to Everyone. In the example below, the Presentation document is shared but the other documents are not.

Taking documents offline previously required SharePoint Workspace to be installed or the use of Outlook. A new SYNC icon at the top right of the Documents page connects the user’s documents to the local computer. These documents can now be taken offline and edited or documents added directly from the PC into the user’s document library. Users working offline are simply dealing.

Profiles also act as the basis for People Search, which will be covered in more detail in this blog series.
COMMUNITY SITES

The last Social area we’ll cover in this post is around a new capability in SharePoint 2013 called Community Sites.

Community Sites in SharePoint 2013 greatly improve the Discussion feature of SharePoint 2010 by providing an entire site focused around organising conversations and encouraging users to participate. Discussion topics (or threads) are assigned to a category which can have a description and an image. The category view is a nice way to see the different areas of discussion on the community site:

Users can join or leave a community as they wish. A reputation system has been included and points are gained for activities like posting topics, replying and liking. Reputation points are displayed as a small bar graph next to member names or as text. Badges such as “Expert” and “Professional” can be defined for a community and gifted to members by the moderator. Reputation points and Badges are designed to increase participation but also give confidence on the accuracy of replies.

When a post is made it can also be marked as a Question. The person who created the question can mark a reply as the “Best Reply”. This places the reply at the top of the page for all users to see – a great capability for commonly accessed knowledge bases.

Community sites are an excellent addition to the Social capabilities of SharePoint, providing open areas for staff to ask questions and gain knowledge outside of traditional tools such as Email.

We hope you’ve enjoyed our tour of Social features in SharePoint 2013 and agree that the investments Microsoft has made are extremely valuable. Stay tuned for our next post, which covers Document and Records Management and Productivity.

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Following along in our series on SharePoint 2013, here is what’s new for Document Management. In addition to the document management-specific features described here, many of the general improvements throughout SharePoint also relate to Document Management.

CLOUD FIRST
The key message for all of Microsoft Office, including SharePoint, is cloud first. This doesn’t just mean that Office 365’s cloud hosting of SharePoint is improved. A key feature is the tighter integration in Microsoft Office 2013 to SharePoint and the concept that SharePoint presents cloud-like capability to users regardless of whether it’s being run on-premise or through Office 365. Here is what you get when you click Save in Word 2013 on a new document:

This further consolidates SharePoint as the obvious choice for building document management systems in a Microsoft environment. The second place that Office wants you to save your documents in is SkyDrive. SkyDrive is like Dropbox in that it synchronises files between your different computers and a web copy in the cloud. The SkyDrive Pro version that comes with SharePoint not only syncs all your computers together, but the cloud copy of your file is now in your personal area of SharePoint so that it is stored centrally and shareable within your organisation.

The beloved but risky home drive – or “C” drive – has finally got an alternative that people will be happy to use. SkyDrive is as easy to use as a local folder yet at the same time allows enterprises to overlay the types of management and security that have long been a strength of SharePoint.

IMPROVED BROWSER SUPPORT
Document management is now greatly improved on all modern browsers. My favourite example of advanced functionality that didn’t work except on Internet Explorer is now fixed:

Another example is the Datasheet view. Now in FireFox there is a Quick Edit button that opens up a view very similar to Datasheet view. Overall the browser support on iPads and other browsers is now pretty usable.

UNIFICATION OF SHAREPOINT, EXCHANGE AND LYNC
A major investment by Microsoft has been made in the integration of SharePoint and Exchange. Lync conversations also save directly into Exchange, so that all three are effectively integrated. This creates a new server-side option to using a client-side tool such as the excellent OnePlaceMail which move user-selected content into SharePoint.

A search in Exchange includes items in SharePoint and a search in SharePoint includes items in Exchange. The eDiscovery features of SharePoint have now been applied to Exchange content so that legal holds can be created over both SharePoint and Exchange content. The following Microsoft diagram shows how the new Team Folders create a common view across SharePoint and Exchange data.
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PINGAR IN THE APP STORE

Now SharePoint has an app store too. Behind the app store is a whole new approach to building custom code for SharePoint. One cool app in the store right now is Pingar. These guys are one of New Zealand’s own little stars. Pingar’s apps use linguistic knowledge processing techniques to automatically extract metadata from documents and to automatically generate summaries of a document. Pingar’s goal is to make entering metadata obsolete. Now by using the App store their advanced technology becomes available with a few clicks, instead of requiring a developer to integrate a web service.

RECORDS MANAGEMENT

eDiscovery has had one of the largest development efforts in SharePoint. While eDiscovery is great for the litigious USA, in friendly New Zealand and Australia the feature is unlikely to become as important for these purposes, but there is a good chance they’ll be repurposed for other uses.

The new eDiscovery improvements mean that when a legal hold is placed on a site or a set of documents identified by a search, those documents are frozen in time for the purpose of the case. In SharePoint 2010, any held content cannot be edited until the hold is released. In SharePoint 2013 users can go on editing content without affecting the frozen versions. Holds also apply to Exchange items which create interesting options for Record Management of Microsoft Exchange content.

The ability to export all the content of an eDiscovery search is new. The export will include all relevant documents, list items, pages and mails stored in your Exchange server. Additionally an XML file is created so that the set of content can be read in the courtroom using any compatible eDiscovery tool.

This export feature should be useful for archiving and other uses outside of the eDiscovery scenario.

RECORDPOINT

As you may know, we have a close partnership with RecordPoint http://www.recordpoint.com.au. RecordPoint helps SharePoint meet Public Records Act (PRA), ISO and VERS record management standards. The improvements in SharePoint 2013 Document Management do not eliminate the need for RecordPoint. In fact, RecordPoint has also been working with SharePoint 2013 for some time and will be leveraging some of the new features of SharePoint to extend their own product. We look forward to being able to reveal more about where RecordPoint is going in a future post.

SharePoint 2013 represents a major step for moving document management into the cloud and the mobile era of computing. The tighter integration with Office and the many new features in SharePoint will further consolidate SharePoint as the logical choice for Document Management in most Microsoft shops.

Please read our other blog posts in this series on SharePoint 2013 (name and link to individual posts) - many other new features in SharePoint noted elsewhere relate equally to Document Management.

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Search is an area of SharePoint that has been greatly improved with the forthcoming SharePoint 2013 release from Microsoft. The changes range from a new richer user interface through to a completely revamped back-end architecture.

The old features that we have come to expect from SharePoint Search are still around – full document and content searches, people and profile searches, and connecting Search to external systems with BCS to name but a few – but Search in 2013 has been enhanced to provide a more scalable and highly configurable platform.

SO WHAT ARE SOME OF THE BIG CHANGES IN SHAREPOINT 2013 SEARCH?

» **Search user interface** improvements include a Search hover panel that provide us with full content previews for Office documents and rich assets. The Search refinements have also been enhanced with the inclusion of a visual refiner that provides greater context and refinement options. The Search interface improvements warrant some more attention and are looked at later in this post.

» **Architecture** has been simplified with the consolidation of previous Search products – Search Server Express, SharePoint Enterprise Search and FAST Search Server – into a single SharePoint Search platform. The new architecture of 2013 Search has been designed to include the best components of these previous products along with options for better scale out of environments providing both redundancy and performance benefits.

» **Administration** options for Search 2013 are now available at both the site collection and an individual site level. This includes being able to define local Search metadata, the sources of Search results and configurable display options. There is still a need to globally manage Search but this more multi-tenanted approach to Search administration opens up the ability for organisations to delegate many aspects of day-to-day Search administration to site owners and site collection administrators.

» **Content model** changes are delivered through Search Content web parts that leverage the Search index for performance and allow the content to be sourced and shared across site collections. These Search-based web parts are found in many areas of 2013 such as the new WCM capabilities, the Product Catalogue functionality, and in My Site content roll ups. This is a highly customisable and high performance method of presenting content which will be beneficial for many WCM and ECM scenarios in 2013.

» **Search Result Customisation** is no longer dependant on XSLT but instead is built using ‘plain-old’ HTML and JavaScript based Display Templates. This change aligns Search and the rest of SharePoint 2013 closely to these common client-side technologies for the development of customisations.

» **Analytics** brings better relevance to 2013 search results through advanced content and usage analysis. “Popular Results” and “My Previous Searches” are examples of what the new analytics processing component of Search adds to the Search experience in 2013.
THE SEARCH INTERFACE

The SharePoint 2013 Search interface has been refreshed and includes elements that are more familiar to users of popular web search engines. We still have the key functional aspects from earlier versions of SharePoint but the 2013 Search results provide a richer UI than what we have had previously.

Search Refiners were a welcome addition to 2010 that allow us to take a set of Search results and "refine" them based on metadata associated with the content. E.g. Authored by Nick Hadlee or Result Type is a Word document.

The 2013 refiners have been given further enhancements:

» **Entity Extraction** introduces the ability for entities such as people’s names or company names to be extracted from the contents of documents and made available as a metadata selection in the refiners. This was previously only available in FAST Search.

» **Deep Refiners** are another capability taken from FAST that ensures the entire Search index is used to calculate the refiner information. SharePoint previously trimmed the dataset used in the refiners.

» **Visual Refiners** provide a way of visually seeing the information driving the refiner, complete with an interactive slider to do the actual "refining". See the Modified Date in the screenshot as an example of these new visual refiners. Visual refiners are extensible and customisable as well.

New to our kitbag of Search customisations are **Query Rules**. These allow us to define (1) Promoted Results and (2) Result Blocks. We can also use rules to directly manipulate the query itself.

(1) **Promoted Results** were formerly known as Best Bets in 2010. These allow us to define a link to be shown for specific Search terms e.g. ‘developers’ shows a link to the SP2013 training on MSDN.

(2) **Result Blocks** are an inline set of results that effectively provide "results-within-results" based on the query. This could be rich media content previews e.g. images for the current search, content from external systems e.g. a Wikipedia search or any other useful "snapshot" of content from the Search index.

The new **hover panel** is shown when users hover over a results item. It provides more content about our Search result:

(1) Search popularity and view counts from the analytics component.

(2) A preview for Word, Excel and PowerPoint documents as long as we have Office Web Apps available* or some other rich preview such as an image or video.

(3) Additional actions i.e. Follow, Edit or View this content...

* **Note**: Office Web Apps is a separate product in 2013 and it needs to be installed in its own Office Web Apps server or farm.
SEARCH ARCHITECTURE

The Search architecture has undergone major change when compared to its SharePoint 2010 predecessor and includes two new components – content processing and analytics processing.

This new architecture provides flexibility to scale out any of the individual Search components to increase performance or redundancy for that specific Search function:

» (1) Crawler component – responsible for acquiring the content that will be processed by the Search service and extracting any metadata properties from documents. Because there is a greater emphasis on the Search index to support the new content model and content web parts, a new Continuous Crawl option has been added to the Search management. This will ensure the Search indexes are continually refreshed and up-to-date for the SharePoint content delivery.

» (2) Content processing component – performs the actual content parsing to extract the Searchable content as well as any entities, e.g. a company name from within the document’s content. The content processing in 2013 includes a number of high performance format handlers for many standard file types and now also includes some that weren’t supported by default in 2010 (PDF files and Images are the notable inclusions).

» (3) Analytics processing component – performs analysis and processing of the content history (how many times was it opened, edited etc.) to determine popularity-and usage trends.

» (4) Indexing component – the indexing component is responsible for storing the Searchable index which is returned via user queries.

» (5) Query component – this is the component that will request Search results from the index and then return them to the users.

» (6) Administration component – is responsible for provisioning the other Search components, managing the services and the service applications configuration data.

CONCLUSION

SharePoint 2013 is an exciting release and Search 2013 is just one of the overhauled areas of SharePoint that promises some great improvements in both out-of-the-box functionality and a huge range of flexibility and options for architects, IT professionals and developers who work with Search.

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Intergen has been using the web content management capability of SharePoint to build attractive and highly functional intranets, extranets and public-facing websites since it was introduced in 2007. While SharePoint 2010 provided great functionality improvements for building highly branded and customised websites, the capabilities in 2013 have raised the bar even further and positioned SharePoint well and truly as a leader in the web content management space.

SharePoint 2013 contains significant enhancements to enable organisations to leverage the web content management capability and create engaging websites that are easily updated and maintained. This could include the display of product catalogues and easily show information about advertising campaigns and promotions. Below are five key areas SharePoint 2013 has evolved in this space:

1. **Engaging Experiences**: Visual appeal is a must for any public-facing website and SharePoint 2013 makes it easy to implement custom branding, including support for multiple content delivery channels, such as mobile phones and tablet devices. SharePoint 2013 makes it easier for users to find your site with improved Search Engine Optimisation, such as SEO-friendly URLs and auto sitemap generation. You can also reach out to more users by displaying content in multiple languages with enhanced multilingual capability.

2. **Comprehensive Content Management**: SharePoint 2013 sees the addition of rich Item and Product Catalogues, providing website administrators with the ability to easily manage complex product or item listings. Content can also be aggregated over a number of site collections and sources, making it easier to present disparate data sources. Visual interest and appeal go hand and hand with Digital Asset Management capability. SharePoint 2013 is greatly enhanced for much better handling of images and video including image and video rendition management, simplifying life for your content authors by enabling standard image sizes across your website.

3. **Dynamic Content**: Content authors will also love SharePoint 2013’s ability to automatically create content rollup pages and personalised dynamically created content areas based on relevance to the user and other users’ recommendations.

4. **Fast to Market**: Being able to rapidly respond to changing user and consumer behaviour can be a real competitive advantage for some organisations. Inflexible content management systems can stymie this objective. SharePoint meets this challenge by making it easy for pure web designers to create branded websites in SharePoint through the SharePoint Design Manager. This allows your design agency to upload static HTML, CSS and Javascript. The Design Manager wizard will then help you convert this into SharePoint artefacts, including masterpages and page layouts, making it much easier for designers and developers to work together. Rework across sites is reduced with SharePoint Design Packages, making it easy to share site designs across multiple websites.

5. **Combined Content Approach**: With SharePoint 2013 you can provide users with access to information they want where they want it, regardless of where the information is created or sourced from. Authored page content can be easily combined with Item or Product Catalogues, crawled search content, and content from across a number of different site collections and sources.
1. INTEGRATE YOUR DESIGN AGENCY

Web designers that understand how to create HTML, CSS, and JavaScript have all the skills needed to design websites in SharePoint 2013. There are a number of new features that reduce the amount of SharePoint-specific knowledge required to successfully design and brand a SharePoint site. Previous versions of SharePoint required a degree of expertise in specific areas of SharePoint to successfully brand a site. This included knowledge such as what content placeholders were required on a master page, or how a master page implemented certain default classes or styles.

The new SharePoint Design Manager makes it easy for designers to connect their favourite design tool directly to a SharePoint site by mapping a network drive, and then edit the file directly in SharePoint as if it were a local file. When the design is ready, the Design Manager can convert the HTML and supporting CSS and JavaScript files to an ASP.NET master page (.master file) that is ready for SharePoint to use. This same approach can be used for page layouts too.

This is achieved in three steps:
1. Use the Design Manager to create channels that are then mapped to particular devices or groups of devices such as smartphones. Once the channel is created it can be associated with a particular smartphone-optimised design.

2. Insert Mobile Panels into to a page to control what content is displayed in a certain channel. This allows users to selectively include or exclude portions of a page. For example: You might want pages to display only a “brief summary” on the smartphones channel with a “full summary” on the desktop channel experience.

3. Finally, you can force the channel that devices will use, either through the use of cookies or creating custom device detection logic.

This provides for much improved mobile functionality for public-facing websites.

2. ENGAGE WITH MOBILE

Browsing the web on a mobile device is now commonplace. Users now expect that a website should be optimised for usability on smartphones and other mobile devices such as tablets. Previous versions of SharePoint included an auto-generated mobile view that was difficult to customise.

SharePoint 2013 introduces mobile channels that enable you to render a website in multiple ways and use different designs that target different devices. Users can also create content that targets these different devices or channels.
SHAREPOINT CONTENT MODEL

Provide users with access to information they want where they want it, regardless of where the information is created or sourced from. Site collection boundaries are no longer an issue for publishing SharePoint content. SharePoint 2013 introduces the concept of the Catalogue. Lists and Libraries can now be flagged as a catalogue, allowing them to be used in pre-defined search queries and enabling content to be "published" across multiple site collections.

There is also a new Product Catalogue site template that allows the creation of commerce-style websites or used as a content repository or knowledge base. Search is again used to "publish" content through or across multiple site collections enabling real reuse of content.

Navigation and URLs can now be driven by your metadata Term Store. This is especially useful for catalogue-style sites, as it provides for dynamic “topic” page creation, minimising the number of physical pages needed.

3. MANAGE YOUR DIGITAL ASSETS

An engaging website needs visual interest and appeal. This is often generated through the use of attractive imagery and video content. To reduce the burden of this from your content authors, a content management system needs strong digital asset management capability. Digital asset management is greatly improved, with much better handling of images and video.

New image rendition functionality in SharePoint 2013 allows the dynamic transformation of images in SharePoint, creating thumbnails and resizing the actual image, not just the presentation. Standard image sizes can also be defined for the entire web site, ensuring consistency. Images can also be cropped within SharePoint, greatly improving the content editor experience.

Video support improvements include easier embedding of video, thumbnail generation, video renditions and support for external videos such as YouTube videos.

4. INCREASED SEARCH ENGINE FINDABILITY

Many organisations invest heavily in their public web presence and want to know that they are generating the greatest return on this investment by maximising the number of people viewing their site. Search Engine Optimisation (SEO) is a key facet in this regard and is an area that has been significantly overhauled. SharePoint 2013 now implements SEO friendly URLs with automatic sitemap generation. Each page also provides an interface for managing SEO properties such as Meta Description, and Meta Keywords.

This is a summary of a few of the exciting changes to the SharePoint 2013 web content management and mobile capability. if you’d like to talk in more detail about this or how SharePoint 2013 can assist your organisation please don’t hesitate to get in contact.

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<table>
<thead>
<tr>
<th>FEATURES</th>
<th>SHAREPOINT 2010</th>
<th>SHAREPOINT 1S</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friendly URLs</td>
<td><a href="http://www.contoso.com/Pages/about.aspx">http://www.contoso.com/Pages/about.aspx</a></td>
<td><a href="http://www.contoso.com/about">http://www.contoso.com/about</a></td>
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<tr>
<td>Home Page Redirects</td>
<td>HTTP 302 for <a href="http://www.contoso.com">http://www.contoso.com</a> to redirect to /pages/default.aspx</td>
<td>Home page served from address <a href="http://www.contoso.com">http://www.contoso.com</a> with no redirect</td>
</tr>
<tr>
<td>XML Sitemaps</td>
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<td>Automatically generated and referenced in robots.txt</td>
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<tr>
<td>SEO Properties</td>
<td>&lt;title&gt; and &lt;h1&gt; must be the same</td>
<td>Browser title, Meta description, Meta keywords. All editable</td>
</tr>
</tbody>
</table>
It has been an exciting couple of weeks within the SharePoint community with the much anticipated release of SharePoint 2013 Public Preview. So what’s new and cool? And as an IT Pro/SharePoint Consultant/SharePoint Developer/Business Analyst, what do you need to know about SharePoint 2013?

In this post I’ll provide an overview of the following areas of SharePoint 2013:

» Features

» Architecture Changes

» Service Application Architecture

» Enterprise Search

» Authentication and Authorisation

» System Requirements

SharePoint 2013 Features Overview

In general, SharePoint 2013’s architecture is similar to SharePoint 2010’s, although there have been numerous capabilities and platform level enhancements introduced with SharePoint 2013. These include:

» Shredded Storage – ability to send only changes that were made at a file level back to the database. This is very significant when working with large documents.

» SQL Improvements – building on SQL 2012 enhancements

» Cache Service – building on Appfabric caching model. This gives cross-server caching ability within the SharePoint 2013 farm, allowing SharePoint to more easily scale to large deployments.

» Request Management – capability to manage requests made to large SharePoint farms to divert them individually to unique workload servers

» Themes – User Graphical modification engine

» Sharing – ability to share sites and documents

Service applications within SharePoint 2013 have been built upon the robust architecture available within SharePoint 2010. Newer service applications and improvements have also been committed alongside existing ones. The Office Web Application is no longer a service application but rather a standalone product. This also gives it the ability to interact with other members of the Microsoft Stack such as Lync and Exchange. Search has been given a massive overhaul, with Web Analytics now part of the search engine rather than a standalone service.

SHAREPOINT 2013 ARCHITECTURE CHANGE OVERVIEW

REQUEST MANAGEMENT (RM)

The main purpose of RM is to give more control over incoming requests so that SharePoint Administrators can determine which server within the farm is able to manage and action those requests. These requests can be in the form of URL, user agent, or source IP, which allows SharePoint to customise the response to each request. One of the main goals of RM is to route traffic to Web Front Ends with better health so that the farm can be managed more efficiently.

RM can also manage and deny harmful requests and deny them immediately. RM also ties into request throttling by prioritising requests from end users. Search requests can be throttled and sent to specific servers within the farm. One of the other key features is to isolate traffic to help troubleshoot errors onto one server.

ANALYTICS FEATURES AND IMPLEMENTATION

The new analytics platform replaces the Web Analytics Service application which exists within SharePoint 2010. This enables the new engine to build upon and solve some issues within the previous model. Some of the new improvements include:

1. Finding relevant information and search relevance, based on views and click-through
2. Ability to use indicators ("hot") and usage numbers, which basically ties into what’s popular based on number of views as well as number of unique users who viewed the item or topic.

3. Ability to understand how much of the content is being used (viewed) and how it compares to other content that is available.

4. Ability to analyse discussion boards to find topics that have higher "hot" indicators.

5. New model makes third party tools to build upon it.

**DISTRIBUTED CACHE**

With SharePoint 2013 there is a new distributed Cache Service based on Windows Server AppFabric Distributed Caching. It is used in features like Authentication Token caching and My Site Social Feeds. This service is installed on all servers within a SharePoint 2013 farm.

The service can be stopped and started on any server within the farm based on unique requirements within the farm. The service is managed through the “Services on Server” page in Central Admin as Distributed Cache Service. Config Database within your SQL backend stores information about the farm and the servers running the Cache Service.

**ALTERNATE ACCESS MAPPING, HOST NAMED SITE COLLECTIONS AND SELF SITE CREATION**

With SharePoint 2013, there is a strong preference to reduce reliance on Alternate Access Mapping (AAM) and go down the path of Host Named Site Collection. It functions similarly to AAM but gives the ability to associate multiple URLs with a site collection. PowerShell is used to manage URLs. This also gives the ability to use different zones in conjunction with the URLs for a site for different authentication methods. One of the key benefits of this is the ability to use more than five URLs for a site. SSL termination can happen on a load balancer which is commonly known as Off-Box SSL Termination.

Self-Service Site Creation (SSSC) has been completely revamped. Administrators can specify a custom form that should be used to create a new site along with a policy that can be defined.

That form can be within the same Web Application or an entirely different Web Application.

**SHARING**

With SharePoint 2010, sharing a site was slightly convoluted and had some drawbacks. Users don’t understand what permission level to grant other users, see who has been invited or don’t understand what rights they are giving end users when they get added to a SharePoint group. The process involved trial and error to figure out if the permissions had been properly assigned. SharePoint 2013 is designed to address these limitations with the Sharing feature. A sharing dialog now exists for adding users, distribution groups and security groups, along with customisable email invitations. A management page is also available to admins, where they can view and respond to all requests. A personal permissions page is also available, where users can request more permissions than they are currently entitled to. This brings in the conversation component to requests so admins and the end users can have a dialog about the request.
SHAREPOINT 2013 SERVICE APPLICATION ARCHITECTURE OVERVIEW

SharePoint 2013 shares the same model that was introduced with the SharePoint 2010 service application architecture. With SharePoint 2010, the architecture was changed completely and with SharePoint 2013 the principle remains the same.

- Services can be individually consumed from any Web Application
- Allows for a very rich farm structure
- Provides flexibility to utilise services based on application requirements
- Numerous new enhancements in platform level
- Newer Service applications such as Translation Service, App Management Service
- Office Web Apps is no longer a service application but rather a product on its own
- Web Analytics is no longer a service application of its own and is built into Search

Service Applications with their own DBs:
- App Management Service
- Business Data Connectivity
- Managed Metadata Service
- Search
- Secure Store Service
- SharePoint Translation Services
- State Service
- Usage and Health Data Collection
- User Profile
- Word Automation Service
- Access Services App databases

SHAREPOINT 2013 ENTERPRISE SEARCH OVERVIEW

Search is probably one of the most important components within SharePoint 2013. The architecture has been completely revamped in SharePoint 2013. To begin with, here are some of the new components that tie into Search Service Application model:

- Crawl
- Content Processing
- Analytics Processing
- Index
- Administration
- Query Processing
Also important to note at this point, is the various search processes:

- **NodeRunner.exe.** Within a fully configured SharePoint farm, noderunner.exe is the process that hosts the search components. From a task manager it can be observed that several instances of this process can be running on each application layer server.

- **Host Controller.** All noderunner.exe processes are supervised by this Windows Service. If a noderunner fails, then host controller will detect this and restart it.

- **MSSearch.exe.** The windows services that host the Crawl Component.

   Being the new kid in the block, let’s take a closer look at NodeRunner. The following diagram shows the various Search Host Process:

   - Multiple noderunner.exe instance hosts one search component.
   - Each nodeRunner.exe instance hosts one search component. For example, if you have two index replicas on one server, there will be two Noderunner instances – one for each replica.
   - On a default single server install there will be five instances of the noderunner.exe process.

**SHAREPOINT 2013 AUTHENTICATION AND AUTHORIZATION OVERVIEW**

**Claims, claims, claims all the way!** Even though SharePoint 2013 offers support for Classic Authentication mode, Claims is the default authentication option now. Classic mode can only be managed in PowerShell as it’s gone from the UI. As part of the Preview version, deploying via PowerShell will display an error message that the classic mode is deprecated and has the potential to go away in future release. There is also a new process to migrate accounts from Windows Classic to Windows Claims.

   For example, from PowerShell Convert-SPWebApplication –Identity http://yourWebapplication.com –To Claims –RetainPermissions –force

   This will come into play when looking at migrating a SharePoint 2010 farm to SharePoint 2013.

Another feature with SharePoint 2013 is that SharePoint admins do not have to configure sticky sessions as they are no longer required when using SAML claims. This is because SharePoint tracks FedAuth Cookies in the new Distributed Cache Service. Since Claims-based authentication is the preferred way forward, it is also important to note that significantly more logging ability has been provided to help troubleshoot authentication issues.
SHAREPOINT 2013 SYSTEM REQUIREMENTS OVERVIEW

Let's take a look at some of the changes that have come along within system requirements for SharePoint 2013, affecting hardware, software and browser support.

HARDWARE REQUIREMENTS

The following minimum hardware requirements are based on Single Server Farm Model, as shown below:

» Processor: 64-Bit, 4 cores for small deployments and 8 cores for medium deployments

» RAM

8 GB FOR SMALL DEPLOYMENTS

12 GB for medium deployments and 16GB for database tier

» 80 GB of System Drive and maintain two times your RAM as Free Space

SOFTWARE REQUIREMENTS

The minimum software requirements for SharePoint 2013:

» 64-Bit Microsoft SQL Server 2008 R2 SP1

» 64-Bit Microsoft Server 2008 R2 SP1 (Standard, Enterprise, Data Center or Web Server)

» 64-Bit Microsoft SQL 2012 RTM

The following prerequisites are installed by the preparation tool on the SharePoint 2013 Server:

SharePoint 2013 builds upon the robust and familiar SharePoint 2010 capabilities by enhancing and bringing in new functionality to enhance workload experiences and enable new compelling scenarios with the end user in mind. We’ve been pretty excited here at Intergen as we discover all the new capabilities in the latest version of SharePoint and the many ways SharePoint 2013 will help our clients in their working lives. Stay tuned!

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Using Microsoft Office 2013 for Business Intelligence

Microsoft Office 2013 provides a range of new and enhanced capabilities that allow organisations to analyse their data to provide insights into a range of data sources. This post explores how Microsoft Office has evolved as a BI tool, and what BI capabilities the latest version of Office delivers.

INTRODUCTION

Proven as the market leader in the office productivity space, Microsoft Office has, in recent times, been promoted as a solution to organisations’ business intelligence (BI) needs.

With the release of Microsoft Office 2013, we see Microsoft’s broader BI strategy starting to materialise in their mainstream productivity suite. Over the past two years, Microsoft has been delivering a BI message that stakes a claim to a leading position in Gartner’s annual business intelligence magic quadrant across a number of areas, including Platform and Self-Service; Microsoft Office 2013 is a key pillar in delivering on that claim.

Ever since the release of SQL Server 2008 R2, Microsoft has had a truly world class BI offering, delivering a capable relational and multi-dimensional platform. With SQL Server 2012, add to that (amongst many other improvements) xVelocity – its in-memory tabular model, the BI Semantic model and improvements to PowerPivot, Data Quality Services and Master Data Services. These new and evolving products demonstrate clearly Microsoft’s commitment to delivering an ever-improving enterprise platform.

This post presents the key features of Microsoft Office 2013 that highlight the key features which are relevant to considering Office as a BI solution. This isn’t intended to be a comprehensive list of all the new features (there are too many new features to do that), but rather to present key features that demonstrate how Microsoft is delivering on its BI strategy.

With SQL Server 2012, Office 2010 and SharePoint 2010, we saw a glimpse of what Microsoft was planning in delivering self-service analytics. With the introduction of Excel Services and PowerPivot with its tabular model, with Power View as a business-user interactive visualisation tool, together with improvements in Excel, there was enough to build some very capable BI solutions. However, it was frustrating at times, as these products had some limitations preventing us from delivering the “complete” experience, for example full fidelity charting in Excel Services, PerformancePoint Services theming and usability challenges, and Excel’s reliance on pivot tables and lack of interactive charts – to name a few.

While Excel 2010 and SharePoint 2010 delivered many of the core components for information worker productivity, self-service analytics and visualisation, BI professionals often commented on the fact that there was still a gap between Microsoft’s offering, specifically in self-service analytics and visualisation, and the top end market leaders such as Tableau who deliver highly capable, interactive and user-friendly visualisation tools. I’m pleased to state that Excel 2013 and SharePoint 2013 close this gap.

Microsoft has made it very clear that it is leading the BI self-service charge with the mantra “Excel Everywhere.” It is Microsoft’s vision to utilise this common and pervasive application as the primary tool for all things BI. Excel – which includes the Excel web application delivered entirely through the browser, together with Excel Services within SharePoint – is well positioned to become the primary platform for self-service BI. Excel 2013 has had a number of important features added and, in particular, Excel Services has been significantly improved to provide a near Excel-on-desktop experience through the browser. This is an impressive feat given how functional Excel is and how traditionally limiting browsers have been at delivering rich user experiences.
MICROSOFT EXCEL 2013

Released in late 2013, the latest version of Microsoft’s pervasive spreadsheet application builds on the data access, manipulation and analysis features in earlier versions. In this section we look at how Excel has evolved, highlighting several features which are key for using Excel as part of a BI solution.

GUIDED VISUALISATIONS AND SHAPING

One of Microsoft’s three primary goals for Excel is to expose some of its more powerful features and make them easier to use. With a product as mature, feature-rich and as advanced as Excel, it is always difficult to provide a simple and intuitive interface, and many users don’t know about features that may already be available in the application.

The Office ribbon that was first introduced in Office 2007, then refined in Office 2010, attempted to (and largely did) achieve this, but Excel specifically still struggled in this area. What we see in Excel 2013 is a number of context aware in-sheet visualisation aids that address many of these issues.

Real-time previews are presented through many of the task dialogues, presenting accurate rendering of the option highlighted.

COMBO CHART TYPES

Greatly simplified support for secondary...
axis and/or multiple chart types within a single chart.

**MODELLING OF DATA AND PIVOT TABLE ENHANCEMENTS**

Like PowerPivot, Excel now supports bringing data into Excel itself and providing simple modelling constructs such as creating relationships between data sets (individual sheets of data). Relating data enables users to bring in data from different sources and perform analytical functions previously supported only through relational technologies such as PowerPivot, SQL Server and Access. Once the data relationships have been created through the pivot table field interface, pivot tables and charts can be used for data analysis. The example below (figure 5) demonstrates how Excel prompts the user to create a relationship between tables of data when adding a new sheet to the pivot table field view.

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Providing yet another way to model and relate data may seem over the top, but when you consider that many end users will never feel comfortable using PowerPivot and have previously relied heavily on vlookups, this feature has a place.
QUICK EXPLORE

A great new feature designed to simplify analysis using pivot tables is the Quick Explore pop-up. The example below demonstrates that when a user selects a cell in a pivot table, the Quick Explore icon presents itself and when selected the quick explore pop-up is shown. As shown below, this pop-up presents a number of options including drill-across on available dimensions, drill down/up into underlying data and the ability to directly create a trend (over time) or cycle chart (date period comparison).

Those of us familiar with PerformancePoint Services will see a similarity with this style of interactivity.

INTERACTIVE CHARTS

Finally, Excel 2013 makes Excel charts interactive. Users can click on the chart components and use the Quick Explore function. Charts also support double-clicking on a chart element to drill down to the next level of information.
ADDITIONAL SLICER

A Timeline slicer has been added which better supports filtering by time. All slicers are optimised for touch devices in preparation for the touch-enabled Windows 8 devices.

ANIMATED TRANSITIONS

When a slicer or filter is modified, any affected chart now transitions slowly from the old state to the new state – this new animation greatly improves the visual feedback to the user.

PIVOT CHARTS

Pivot Charts are no longer reliant on the existence of a Pivot Table. Significantly, pivot charts can now be inserted on a sheet without the need to first insert and bind to a pivot table. The interface for adding a Pivot Table is now utilised for the chart – pivot tables no longer need to be hidden from view.

EXTENDING PIVOT

Extending Pivot tables with new calculated measures. You can now add a calculated column to a pivot table by simply right clicking on the pivot table and entering the MDX expression.

SUPPORT FOR THE NEW APPS FOR OFFICE EXTENSIBILITY MODEL

Excel now supports a new extensibility mechanism that allows add-in type functionality to be developed through client side HTML and JavaScript. An example of where this can be used effectively is the insertion of a PerformancePoint decomposition chart directly into your Excel sheet. Being HTML-based, applications for Office can not only run within the Excel application but also in Excel Services.

Integrated PowerPivot. PowerPivot and the xVelocity in-memory database technology are now fully integrated in Excel, as opposed to being delivered as an Excel add-in. Go to http://office.microsoft.com/en-us/excel/powerpivot-for-microsoft-excel-2010-FX101961857.aspx for more information about this great technology.
Power View is now fully integrated with Excel. You can insert a Power View chart into Excel from the Insert menu on the ribbon which causes a new worksheet to be created containing a single Power View chart. Any data held within the Excel spreadsheet can be visually represented using the Power View interface.

Power View support for Vertical and Horizontal Multiples. Although it was delivered as part of SQL Server 2012, this visualisation feature is a useful addition that it is now surfaced in Excel. Power View Multiples support multiple repeating graphs inside a single region grouped on a single dimension (e.g. using a Countries dimension utilising a Year multiple, as shown below). Power View supports both horizontal and vertical multiples.

Power View now supports mapping based on data attributes that contain geospatial information (e.g. longitude/latitude, street addresses, regions, cities etc.). To visually represent the data, Power View sends the data to the internet-based Bing maps service, which in turn returns spatial visualisation information and metadata.

This visualisation capability also supports interactive drill-downs to a greater level of spatial detail (for example, moving from a country view to a regional view). This feature is really easy to use: just drag the column that contains the spatial information onto the map and it takes care of the rendering and representation of the key selected measures.
EXCEL SERVICES

Of all the BI-related enhancements, what Microsoft has achieved with Excel Services is the most impressive. Virtually all of the capabilities that have been presented above, both visually and from an interactivity standpoint, are also fully supported in Excel Services (and the Excel web application, for that matter) – all delivered entirely through a web browser.

In my opinion, this is a game changer as we now have seamless integration between the desktop, web and SharePoint for analytical and visual presentation of BI content. Charts now render in full fidelity and furthermore, using SharePoint Channels, the mobile experience can be optimised for mobile platforms as well.

In addition to the visual and interactive improvements, the Excel Web App and Excel Services have also had significant improvements in performance, especially in scrolling and cell selection.

Let’s look at a few examples of key features running in a browser.

Figure 13 - Context sensitive menus (through the browser)

Figure 14 - Support for double clicking drill down (see next figure for the resulting outcome)

Figure 15 - Resulting drill down
PIVOT TABLE VIEWER

Note the Excel Slicers on the left (called Filters in Excel Services) and the Pivot table Field Chooser on the right – all delivered through the browser and fully interactive.

Support for non-Microsoft browsers is also supported – see the screenshot below, taken from an Apple iPad.

Figure 16 - Pivot table support

Figure 17 - Pivot tables through the Safari browser on the iPad (from Chris Webb's blog)

QUICK EXPLORE SUPPORT

In my opinion, a very impressive result!

Figure 18 - Quick Explore support from a Pivot Table
INTRODUCING MICROSOFT SHAREPOINT 2013

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PERFORMANCEPOINT

It’s exciting to see how Microsoft has enhanced Excel and Excel Services, but what about PerformancePoint?

PerformancePoint continues to have people scratching their heads, wondering why it appears Microsoft is not investing in the solution to the same extent it is the other offerings. PerformancePoint had a lot of promise when it was acquired by Microsoft in 2006, but has struggled to be widely adopted, largely due to a lack of usability and flexibility of configuration. With this release of Office we see a continuation of this theme.

Certainly PerformancePoint is still a useful tool in our BI toolbox and still provides unique features not seen in the other SharePoint visualisation components; these include interactive dashboards capable of supporting PerformancePoint, Excel Services and Reporting Services components, paging, common filters, and support for comments. Despite that, it is difficult to see where PerformancePoint fits in the future roadmap as the other BI products continue to evolve and implement many PerformancePoint features.

In saying that, there are a few improvements that caught my attention in this release that improve on what was provided with SharePoint 2010:

FILTER ENHANCEMENTS

Filter Searches and support for hierarchies – useful features for finding the right member in a large list and managing hierarchies – shown below.

THEMES

PerformancePoint now respects SharePoint themes and we understand that this was a significant amount of work for the PerformancePoint team to implement. Themes result in cleaner and more professional-looking dashboards, scorecards and analytic charts. Annoyingly though, specific chart colours are unaffected by themes.

SERVER-SIDE MIGRATION

A frustration with previous versions of PerformancePoint was the significant effort that was involved to migrate content from one site to another. Despite being simple in concept, it was apparently complex to implement. From within SharePoint, you can now package up your PerformancePoint content and migrate it to any other place in the farm – a great productivity improvement and particularly important for customers flowing BI implementation through a dev/staging/production type of lifecycle.
IN SUMMARY

After initially installing and reviewing Microsoft Office 2013, I was a little underwhelmed by what I immediately saw; but as I started to use these tools and became familiar with the new features, I realised how far Microsoft has come in delivering on its BI strategy.

That said, I do have some concerns. One point that stands out is that the Microsoft BI toolset still seems a little disjointed. There are now quite a few products in the Microsoft BI family which creates confusion amongst our clients about which tool is the right tool for a particular need, especially as a number of products share common features.

This conundrum won’t be resolved in the short term, but I have a sense with the way Microsoft has blended features into Excel and Excel Services (for example), that there could be a further consolidation of tools in the next major release cycle to could help resolve this confusion. In the meantime, if you are struggling to understand or decide which components will satisfy your needs then come and talk to us – we have consultants who are more than happy to consider your needs and walk you through the benefits and constraints.

Like any software vendor, there are always aspects that could be improved and new features that we would like to see, and one of Microsoft’s strengths is demonstrating its ability to drive forward, adding value through a continuous improvement cycle.

Analyst firms Gartner and Forrester have both recognised this with their consistently high rating of Microsoft and its ability to deliver on its BI strategy. We also expect to see Microsoft start to lift the cadence of its releases, moving from a three-yearly “big” release to far more frequent small releases.

In my mind, Office 2013 demonstrates enough value add BI features that it shouldn’t be a discussion about if you invest in this suite, but rather when.

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Summary

Microsoft SharePoint 2013 is a significant update that will deliver benefits for organisations who use SharePoint on its own, or that have other solutions that utilise the SharePoint platform. And if you’re looking at SharePoint for the first time, then this latest release will deliver a breadth and depth of capability that will suffice for most organisations.

If you would like more information on any of the topics in this ebook, please feel free to contact us to have a discussion and to better understand how SharePoint 2013 can help your organisation achieve its business outcomes.