



SP Marketplace Product Information and Prerequisites for Installation on Microsoft 365 Online

How SP Marketplace products are built and where are they run from?

SP Marketplace products are native SharePoint solutions that run on your Microsoft 365 tenant. Specifically, they are SharePoint sites that run on your SharePoint online. They are not hosted or stored on our servers or our cloud network.

SP Marketplace Products are built as out-of-the-box Power User level solutions on Microsoft 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 of the complete Power Platform using SharePoint, MS Teams, Power Automate Flows and Power BI.

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

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 M365 platform.

Will SP Marketplace products affect our existing SharePoint online environment?

The answer is no. Our products are natively provisioned SharePoint sites (their own site collection), which means they install in their own site and do not impact the rest of the Microsoft 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 Microsoft 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.

Where does our data and content reside?

All data, documents, and other content are stored on your Microsoft 365 tenant, in SharePoint lists and libraries. Even if you stop using our application, you will still have access to your data and content.

If it is on our Microsoft 365 Tenant, do we need to allow SP Marketplace access for support?

The answer is yes, it is required to setup a *Service Account* user ID for us to use to install, setup, train, and provide ongoing support and maintenance. To protect all parties involved, we offer a customer non-disclosure agreement that ensures protection of any data, content, or information on your sites by our organization. The requirements for the Service Account are provided below.



Do I need to add any additional Office 365 licenses for the administrator or my users?

SP Marketplace products run on a standard SharePoint Online environment that is available in Microsoft 365 Business STD, Microsoft 365 E1-E5 and corresponding G levels as well. We also use the base Power Automate services for process flows. To ensure flow retention and performance we recommend one Power Automate Standalone license for the Administrative user ID. If you wish to use or modify the Power BI dashboard, you will need to have one Power BI Pro license (1 license only).

We require that you setup a separate Service Account for us to utilize for the installation, setup, and support of your products. This can be a minimal level license (E1 or G1 for example). The specific requirements for this Service Account are described in the detail steps found later in this document.

Each user who will access SP Marketplace products needs to have an Office 365 user license or 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).

What staff resources do I need?

You will need to appoint an application administrator who will be responsible for working with the products for your organization. This does not have to be a highly technical person but should be a business power user who is comfortable with using business applications. An example is someone who is an Excel power user. This administrator will become the central point of contact for SP Marketplace.

You mentioned the products are customizable, what can be changed?

If you are a SharePoint business power user who understands the SharePoint Online, you can modify the products to fit your specific requirements. Our business model is not intended to require ongoing service to clients, but to empower them to change the products themselves, or use our services if needed. We provide video-based SharePoint power user training (about 2 hours of video) so you can make minor changes to the template (adding fields, changing list views etc.). If you wish to do more (changing processes, redesigning forms and pages) we suggest your Administrator takes our DIY Academy to be fully equipped to do customizations in more advanced SharePoint and using our Smart Tools.

Prerequisite Setup Details

1. Setup a Service Account User for SPMP Personnel to Utilize

- a) All services are performed remotely via MS TEAMS. To perform installation, configure/setup, conduct trainings, and provide ongoing support we will need access to your Office 365 SharePoint Online environment. Please create a separate user ID for us to use. *Example: SPServices@"yourdomain".com*. This account will require the following permissions and licenses:

Required/Recommended Installation Roles

- Global Administrator – Preferred requirement **OR** if lacking IT staff and/or M365 administration (this will eliminate or minimize any potential installation issues and required authentications)
- SharePoint Administrator – Minimum requirement for installation/QC and highly recommended for post-installation support. **Requires** customer to run a PowerShell script and authentication process prior to installation of our product(s). (Download our PnP PowerShell documentation for instructions & details)
- MS Fabric Admin (for Power BI administration)
- Exchange Admin (not needed if customer pre-set up shared mailboxes required for some add-on products)
- MS Teams Admin -- Required for some products and add-ons.

Required Licenses (always must stay applied to the Service Account)

- M365 Business STD/Premium or M365 E1-E5
- Power Automate Premium License
- Power BI Pro User license

Note: Once we perform the installation, you should not change the password for this user ID as it will break connections in Power Automate (Flows) and Power BI. Multi-Factor Authentication should be turned off during the installation and QC processes only, if applicable.

2. Setup the following on your Microsoft 365 platform in preparation for the installation (we will do these steps if the “Recommended Roles” are applied as noted above)
 - a) The SharePoint App catalog to add our SPFx Webparts
 - b) For department type products (IT,HR, Facilities, Safety, etc.), we optionally use an Exchange Shared Mailbox for incoming tickets and email correspondence. These will need to be created if you have purchased the incoming email to ticket or user correspondence add-ins.
3. If your domain enforces Conditional Access Policies (CAP), please allow the Service Account access rights including MFA exemptions.
4. Security Defaults – Security defaults offer a basic level of security. With security defaults, all policies are enabled at once. For customers that utilize Conditional Access, security defaults will not be available.
5. Determine the names of the sites of the products you are having installed.
 - a) Each product is installed in its own SharePoint site collection and 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.

High-Level Security Requirements? Contact your Account Executive about our High Security Installation and Support options available at an additional cost.



SP Marketplace Installation License and Role Requirements

Quick Guide

Recommended Installation Requirements:

Service Account Roles

1. Global Administrator* – Preferred requirement **OR** if lacking IT staff and/or M365 administration (this will eliminate or minimize any potential installation issues and required authentications)
2. SharePoint Administrator* – Minimum requirement for installation/QC and highly recommended for post-installation support. **Requires** customer to run a PowerShell script and authentication process prior to installation of our product(s).
3. Exchange Administrator – Preferred requirement. Not required if customer creates Shared Mailboxes required for some products.
4. MS Fabric Administrator – Preferred requirement. Not required if customer sets up & configures Power BI required for our products.
5. MS Teams Admin -- Required for some products and add-ons.

Service Account Licenses (required)

1. M365 Business STD/Premium or M365 E1-E5
2. Power Automate Premium – 1 needed for Service Account only (to ensure Flows are not turned off by Microsoft after 60 days of inactivity)
3. Power BI Pro

Absolute Minimum Post-Installation Support Requirements:

1. *Preference* of SharePoint Admin Role applied on account.
2. Absolute minimum of SharePoint Site Collection Admin is required for each installed site

*After your installation and QC is complete and if required, the role of Global or SharePoint Admin can be removed from the service account, however a minimum of Site Collection Admin per site will always be necessary in order to provide product support and/or customization services.

Multi-Factor Authentication (MFA) – preferred it's turned off for the Install/Service account only while our product is being installed and can be re-enabled, if required, after installation and QC.

If your domain enforces Conditional Access Policies, please allow the Service Account access rights including MFA exemptions.