Engaging with External Users at Scale with Microsoft 365 and Branded Portals

Tuesday, November 2, 2021

12 - 1 PM Eastern Time

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- President Toronto SharePoint User Group

2008

Envision IT built custom Extranet solution

2010

2012

Extranet User Manager (EUM) Installer created

2014

Microsoft 365 support

2015

EUM Brand and Website launched

2016

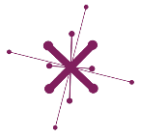
Azure B2B support

2017

Partner Program launched

2018

EUM V4 Launched

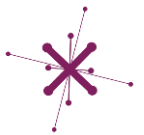


2019

User-Centric EUM Login Teams, SPFx, and Flow

Jan 2021

EUM V5 Launched



July 2021

LMS365 Partnership Established

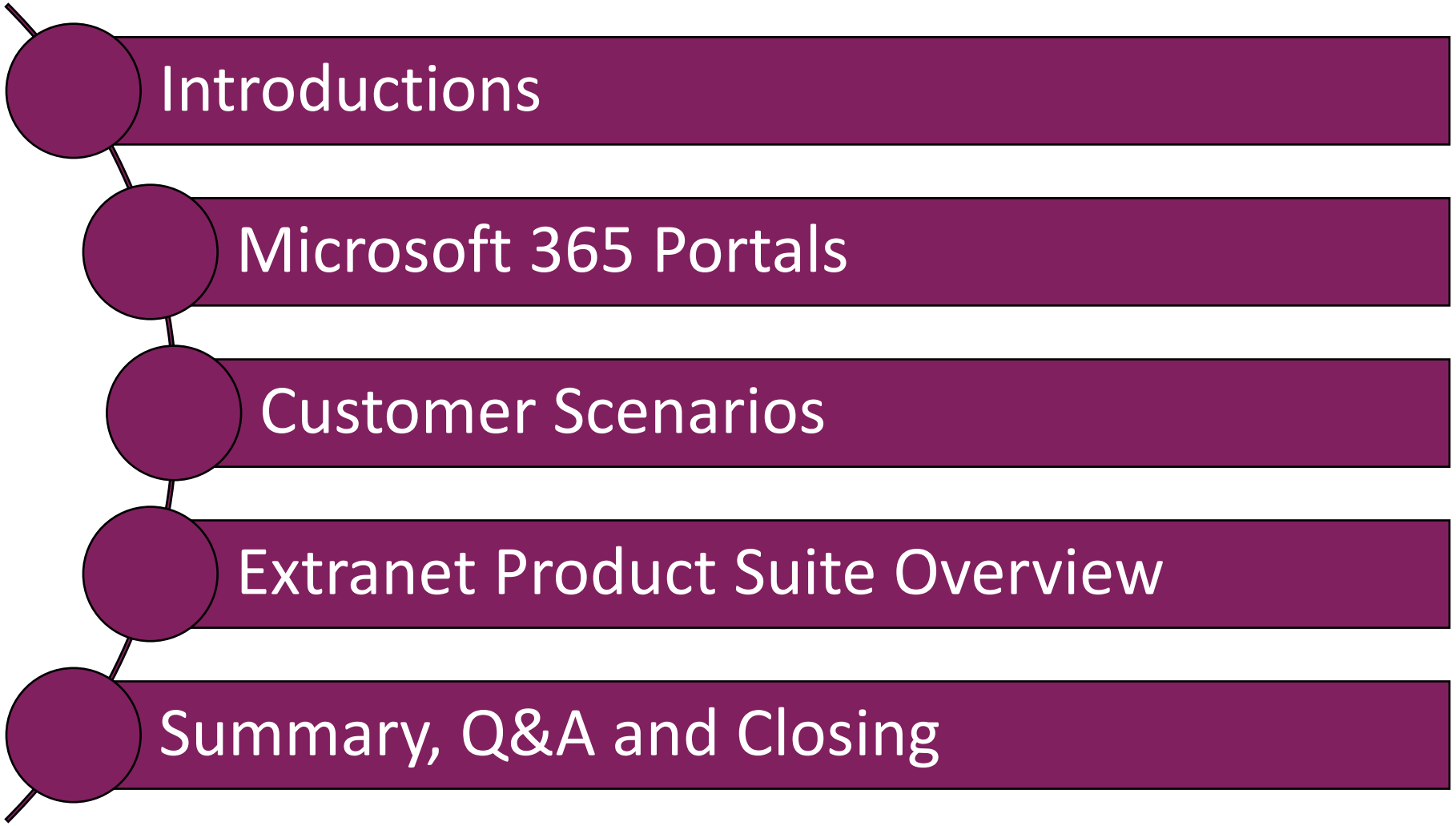
Nov 2021

EUM V6 Launch

Customers around the Globe

100+ Customers Deployed Globally

Agenda


Introductions
Microsoft 365 Portals
Customer Scenarios
Extranet Product Suite Overview
Summary, Q&A and Closing

Why Build a Microsoft 365 Focused Portal?

- **Microsoft 365 is already the spot you're working and collaborating in**
- **You can build a robust portal that relies on a strong Microsoft 365 foundation**
  - SharePoint Online
    - Documents
  - Teams
    - Meetings
    - Recordings
    - Channel conversations
- **Stop sharing through email and third party solutions**
- **Leverage the Microsoft 365 Security and Compliance features while hiding the complexity**
  - Azure Information Protection, Rights Management and document encryption
  - Data Loss Prevention
  - Records retention
  - Multi-factor authentication and Conditional Access Policies
- **It's time to integrate how you're working with how you're sharing**

Portal Considerations

- **How are users invited to the Portal?**
  - Invitation Only – Manual or Automated
  - Public Registration
  - Private Registration
- **What Portal functionality is required?**
  - Secured web content
  - Viewing / Downloading / Uploading documents
  - Co-authoring documents
  - SharePoint Online sites or Teams
  - Third-Party or Internal Applications
- **Who is responsible for Portal content and administration?**

Types of Portals:

Member Portals

Board/Committee Sites

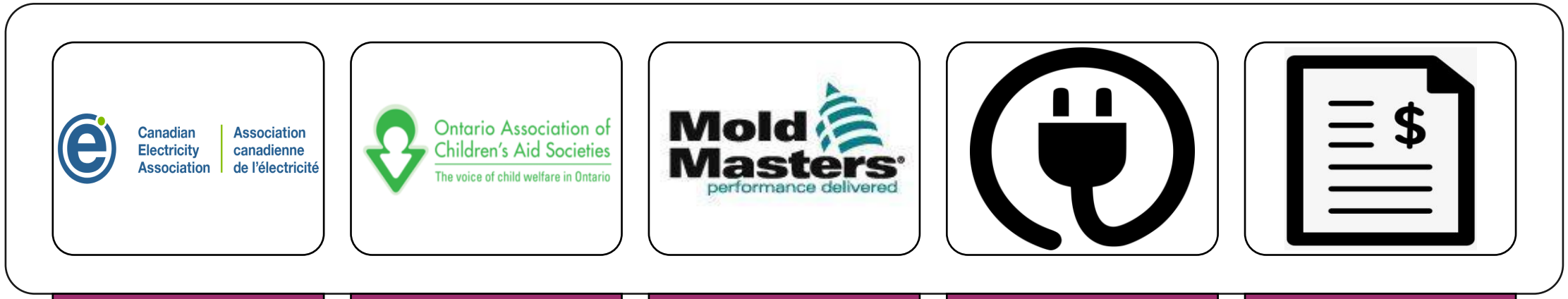
Data Portals

Document Sharing

Training Portals

Portal Scenarios

Scenarios Overview



Canadian Electricity Association

- Member Sites
- Committee Sites
- Data Portal
- Training

Ontario Association of Children's Aid Society

- Member Sites
- Group Sites
- Training

Mold-Masters

- Engineering Drawing Distribution and Approval

Public Utility Company

- Emergency Preparedness Response Plans Document Distribution

Publicly Traded Parent Company

- Financial Reporting Document Collection

Scenario One – Canadian Electrical Association Portal

- **National voice for safe, secure, and sustainable electricity**
- **Portal is targeted to 3 audiences**
  - Utility Members
  - Corporate Members
  - Public
- **Governed by a Board of Directors**
- **Provides industry viewpoint to decision makers on policy and regulatory issues**
- **50+ Committees**
- **8 unique Data Portals**

Canadian Electricity Association | Association canadienne de l'électricité

Scenario One – CEA Member Portal Assessment

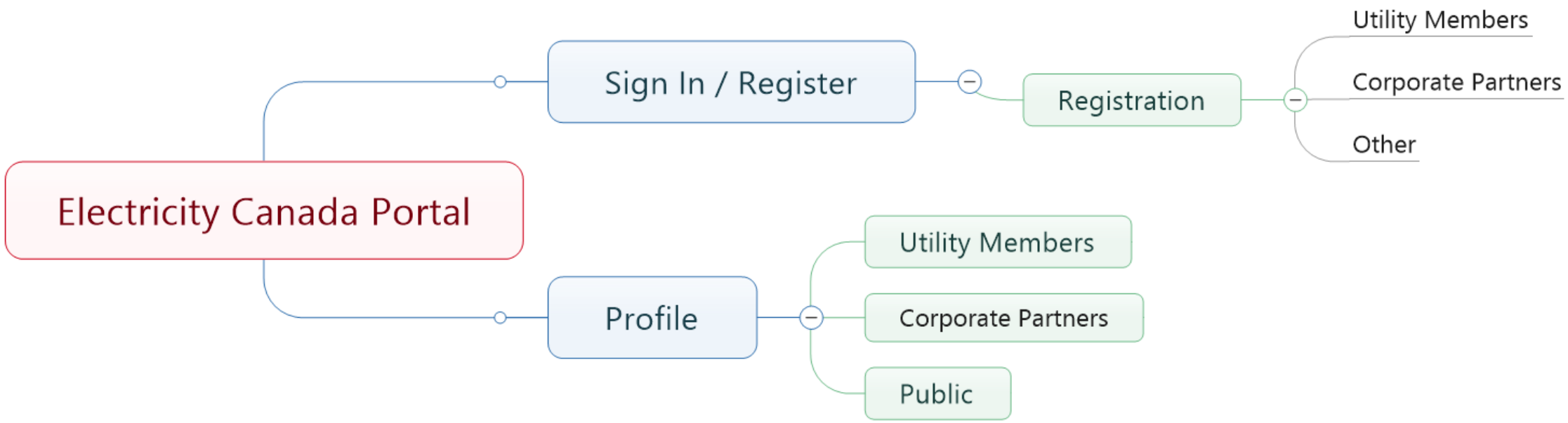
- **Review and provide recommendations around:**
  - Electricity.ca – the Association's current public website
  - Powerline – the Association's extranet site
  - Continuing Education program – no online resource currently exists
  - Data Portal – a series of databases, reports and visualizations on multiple platforms

- **The following high-level goals were established:**
  - Single Sign-on for All Applications
  - Address Duplication of Entry Issues and Contact Management
  - Moving to the Cloud (eliminating on-premises infrastructure)
  - Single Data Platform (Reporting)
  - Cybersecurity

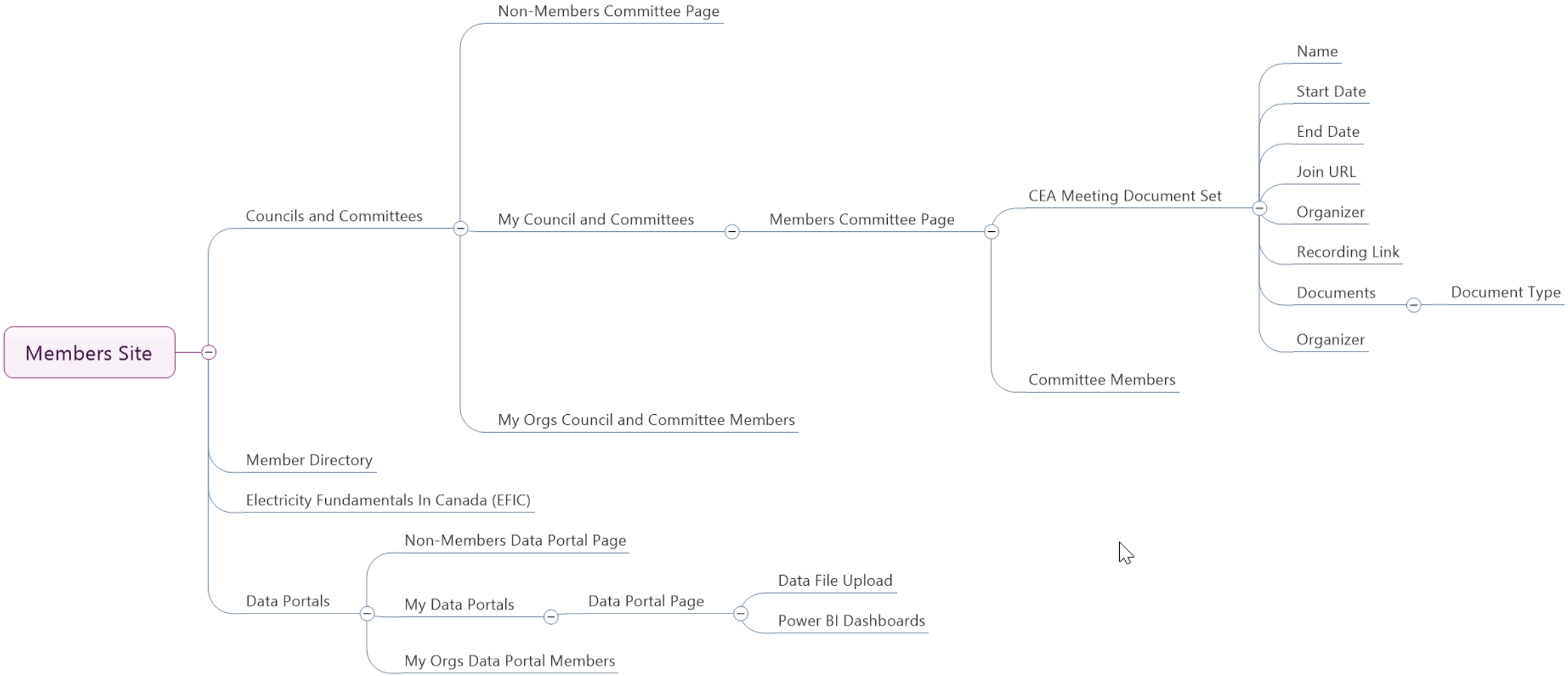
Scenario One - CEA Portal Solution

- **Implementation of Teams Governance tools and training for all CEA staff**
  - Microsoft 365 Discovery Workshop
  - Envision IT's Microsoft 365 Maturity Model training and roadmap
  - Orchestry's Teams Governance tool to standardize how Microsoft 365 is being used
- **Microsoft's Azure AD B2B single sign-on**
- **Creation of a branded CEA portal leveraging Extranet product suite**
  - Committee sites
  - Data portal and LMS sites
- **Expand the usage of Salesforce for contact management software**
  - Consolidate CMS and Wordpress into Salesforce
- **Continue to leverage Mailchimp for email marketing**
  - Integrate with Salesforce

Registration and Profile



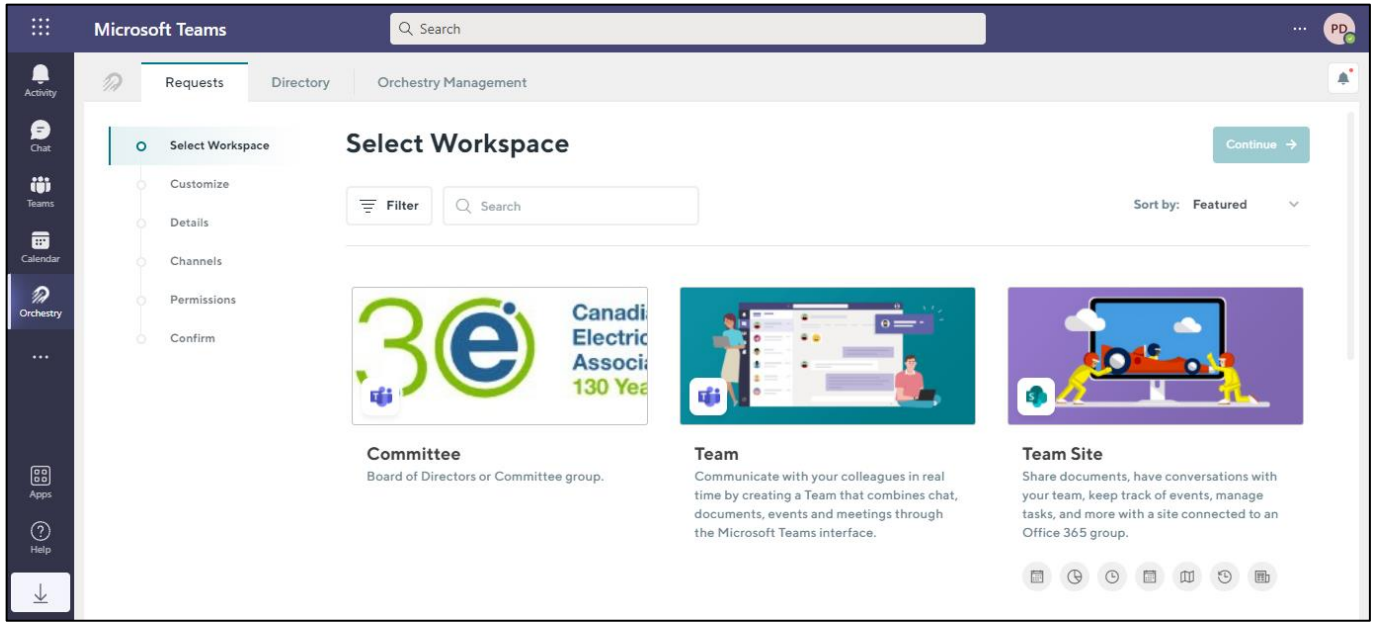
Members Site



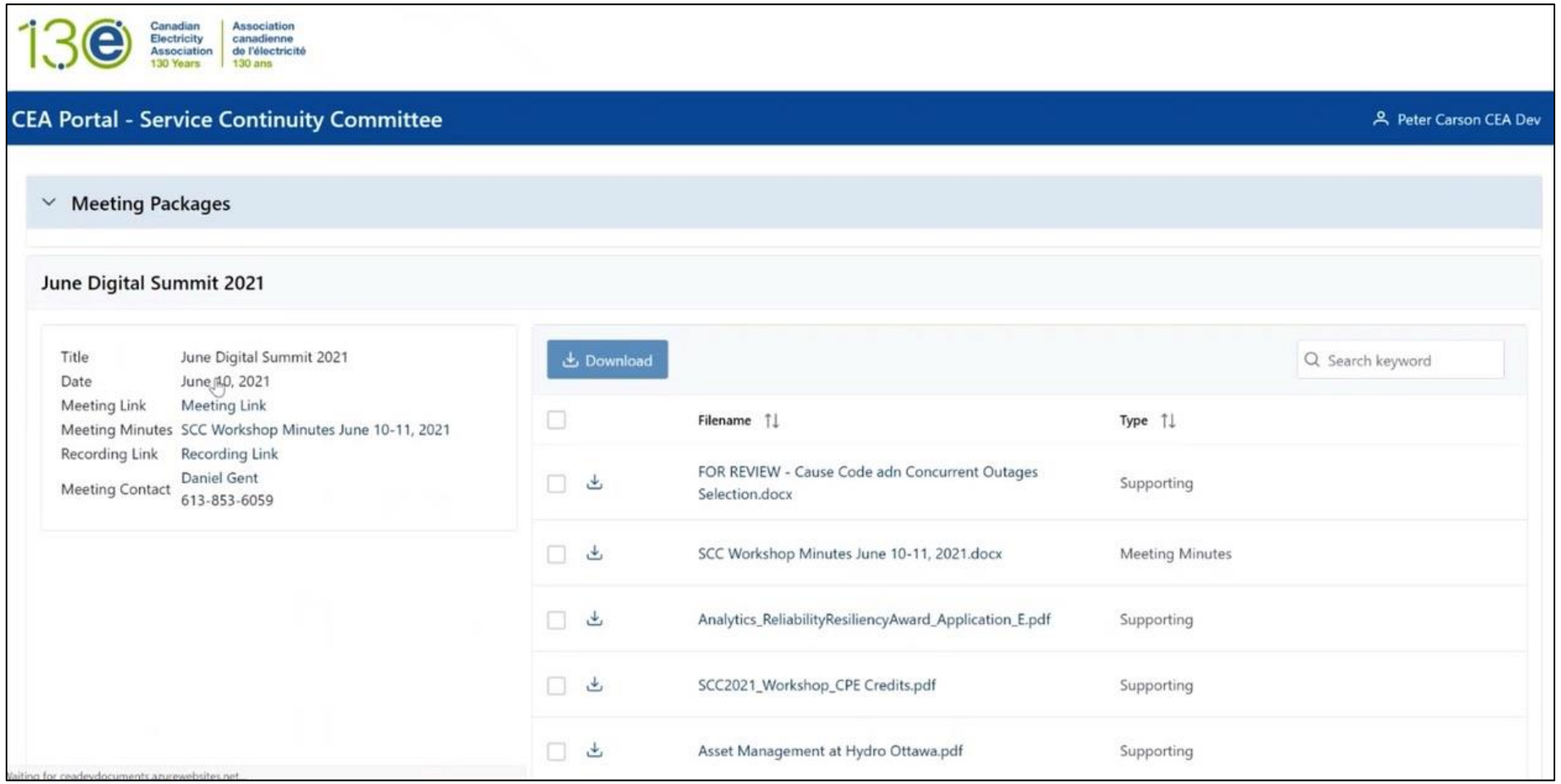
CEA Portal Demo

CEA Committee Team and Site Provisioning

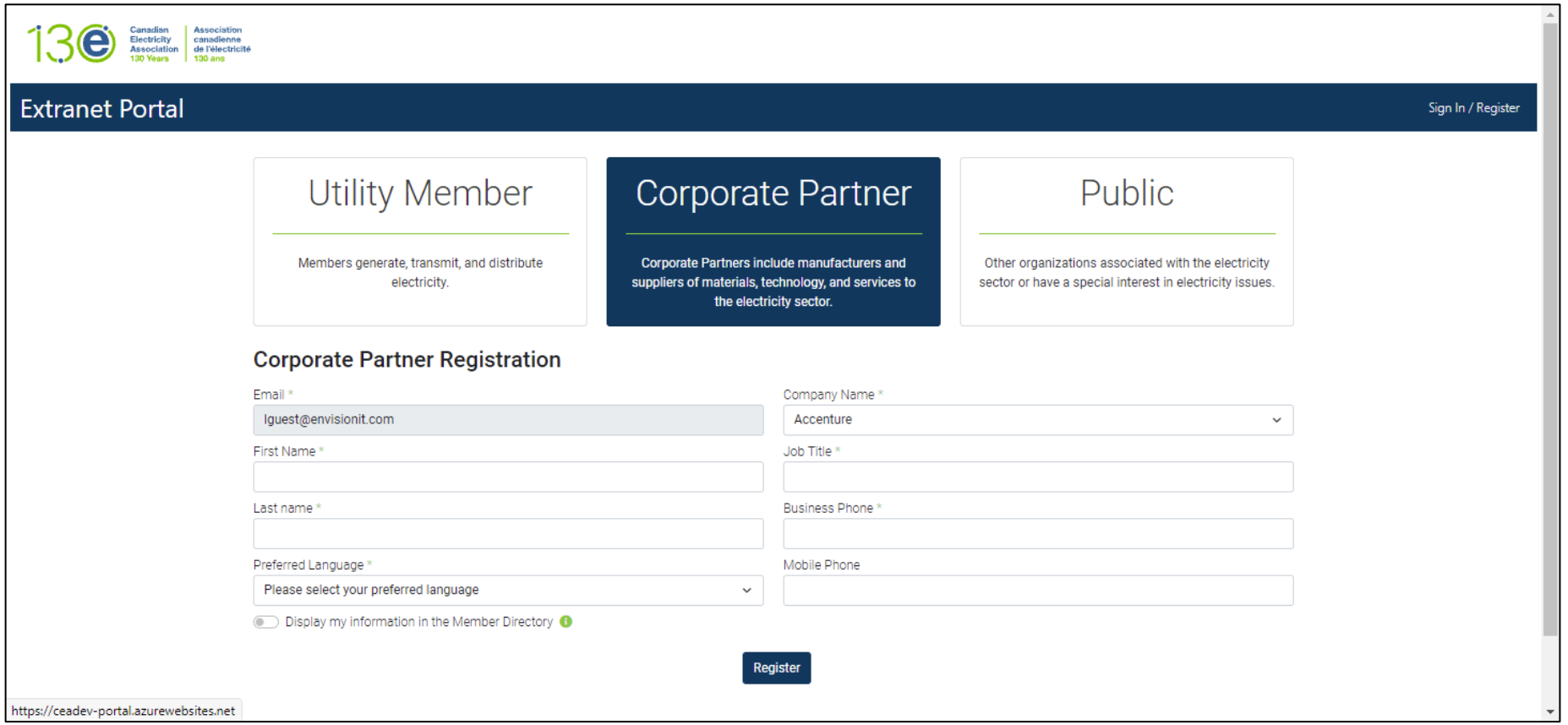
- Automate the creation of Teams and Sites for committees
- Workspace created in Orchestry to represent a committee
- Logic App workflow creates Document Set in Committee Packages site and EUM Group for members
- Powered by Orchestry



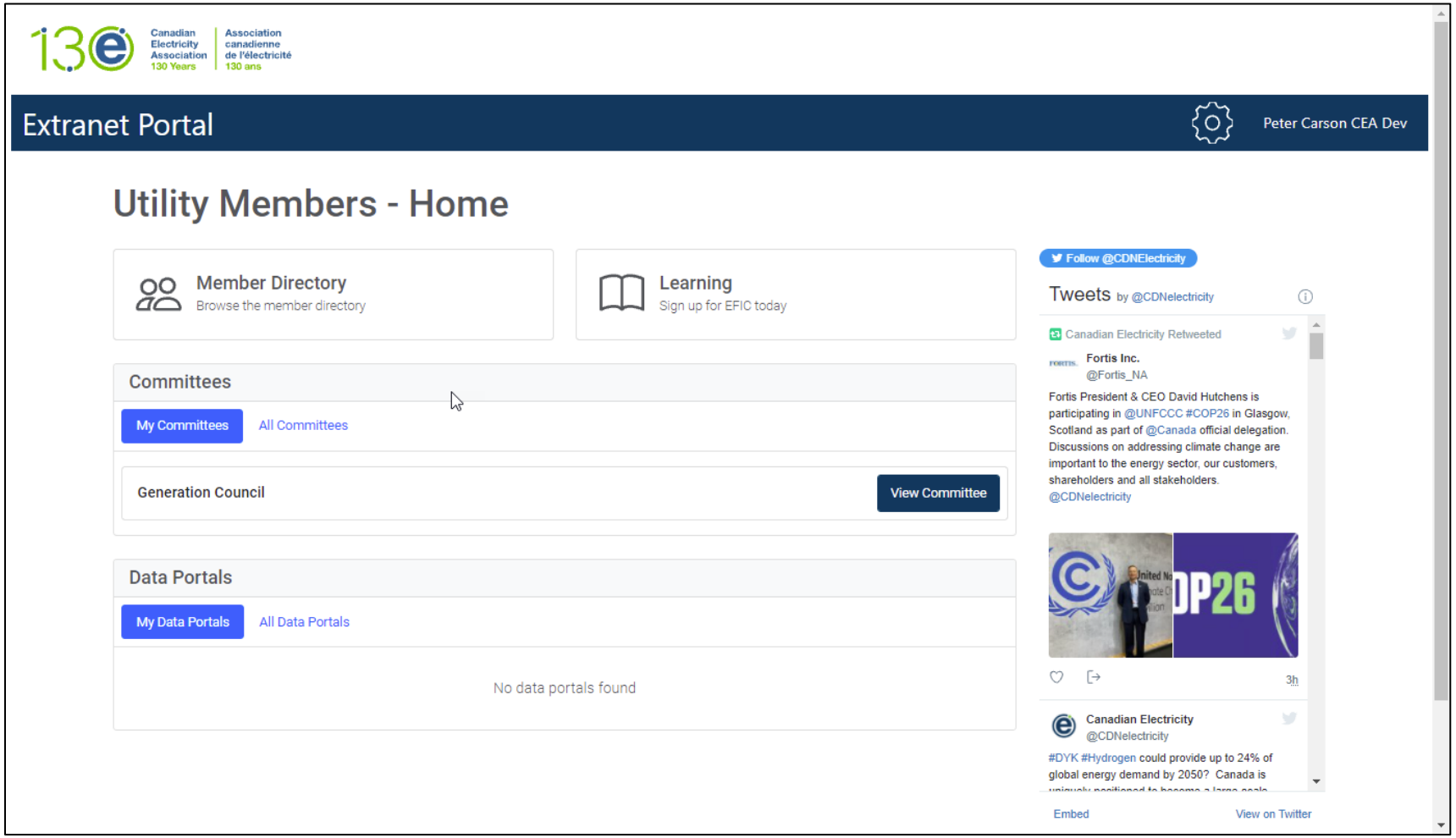
CEA Committee Meeting Packages



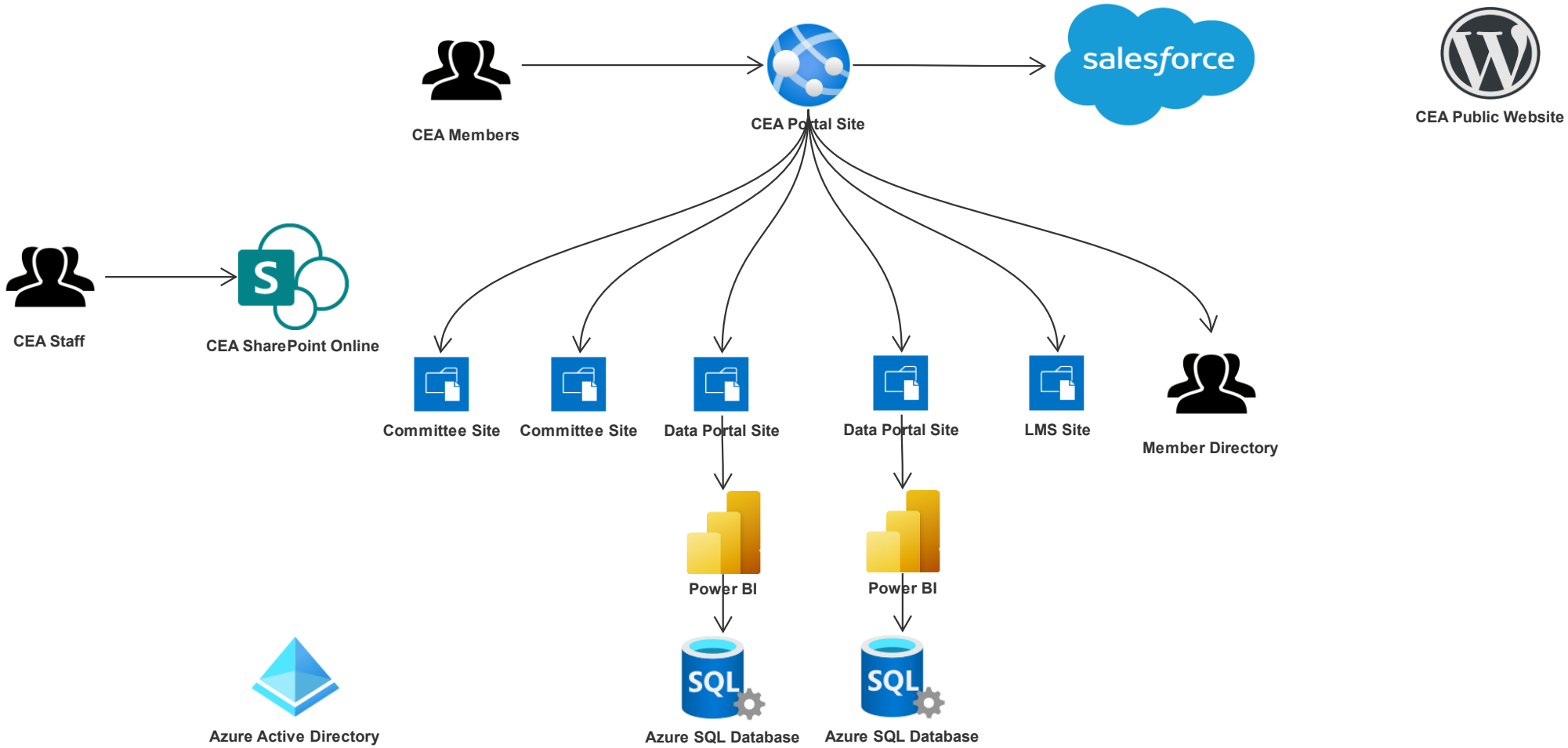
CEA Member Onboarding and Management



CEA Member Onboarding and Management



Scenario One - CEA Architecture Overview



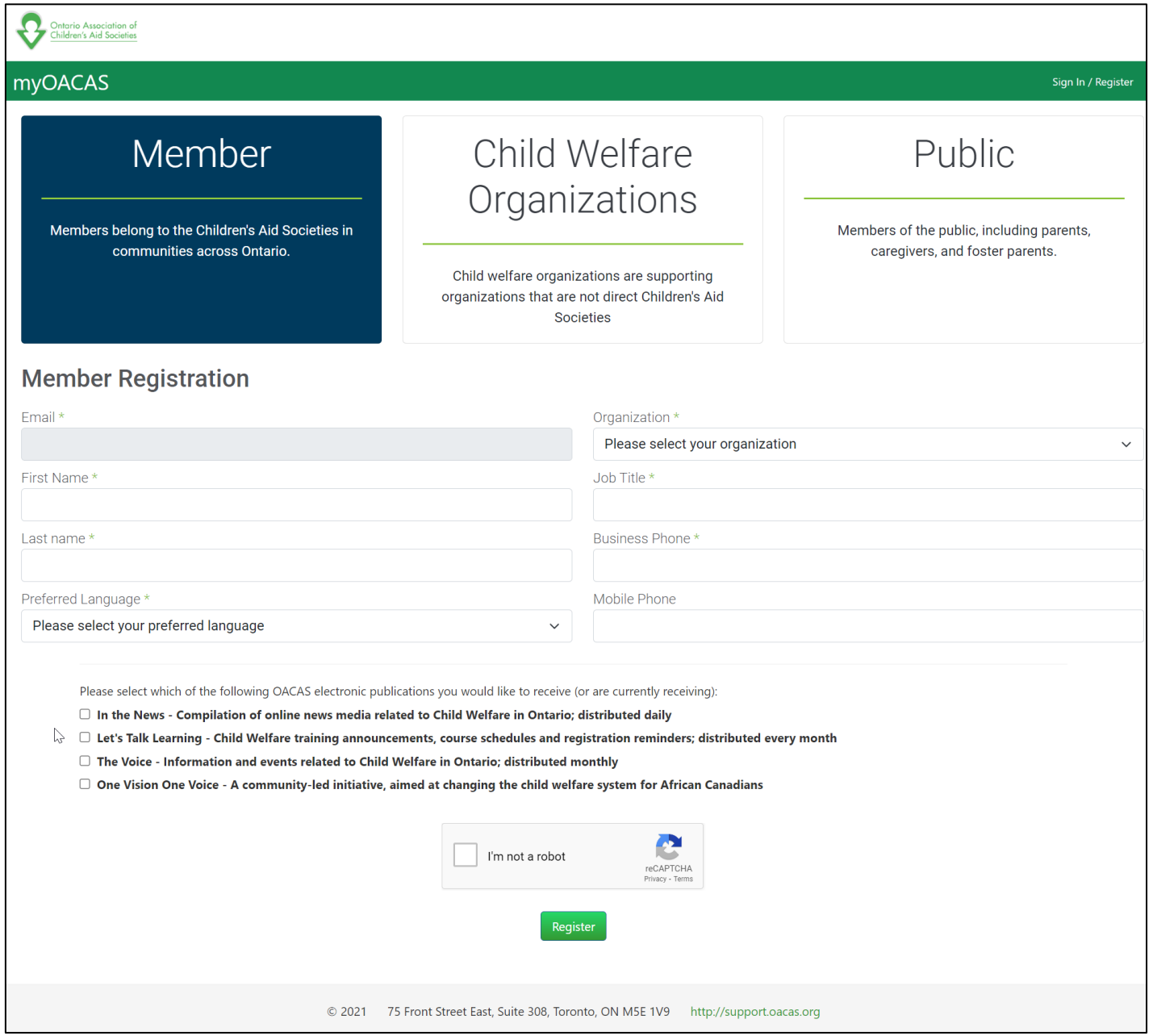
Scenario Two – Ontario Association of Children's Aid Society

- Advocates for the protection and well-being of children
- Voice of child welfare in Ontario
- Consists of over 50 membership organizations
- Provides services in government relations, communications, information management, education and training
- Over 20,000 members in the current portal

Ontario Association of Children's Aid Societies
The voice of child welfare in Ontario

Scenario Two – myOACAS Overview

- **myOACAS Members Portal:**
  - Self-registration
    - Integrated into Desire2Learn and Training Orchestra
    - Auto-approval based on email domain
  - Access to SharePoint Online Group Sites
  - Training delivered through Desire2Learn and Training Orchestra
    - Course Catalog integrated with Stripe payment


Ontario Association of Children's Aid Societies
myOACAS
Sign In / Register
Member
Members belong to the Children's Aid Societies in communities across Ontario.
Child Welfare Organizations
Child welfare organizations are supporting organizations that are not direct Children's Aid Societies
Public
Members of the public, including parents, caregivers, and foster parents.
Member Registration
Email *
Organization *
Please select your organization
First Name *
Job Title *
Last name *
Business Phone *
Preferred Language *
Please select your preferred language
Mobile Phone
Please select which of the following OACAS electronic publications you would like to receive (or are currently receiving):
In the News - Compilation of online news media related to Child Welfare in Ontario; distributed daily
Let's Talk Learning - Child Welfare training announcements, course schedules and registration reminders; distributed every month
The Voice - Information and events related to Child Welfare in Ontario; distributed monthly
One Vision One Voice - A community-led initiative, aimed at changing the child welfare system for African Canadians
I'm not a robot
reCAPTCHA
Privacy - Terms
Register
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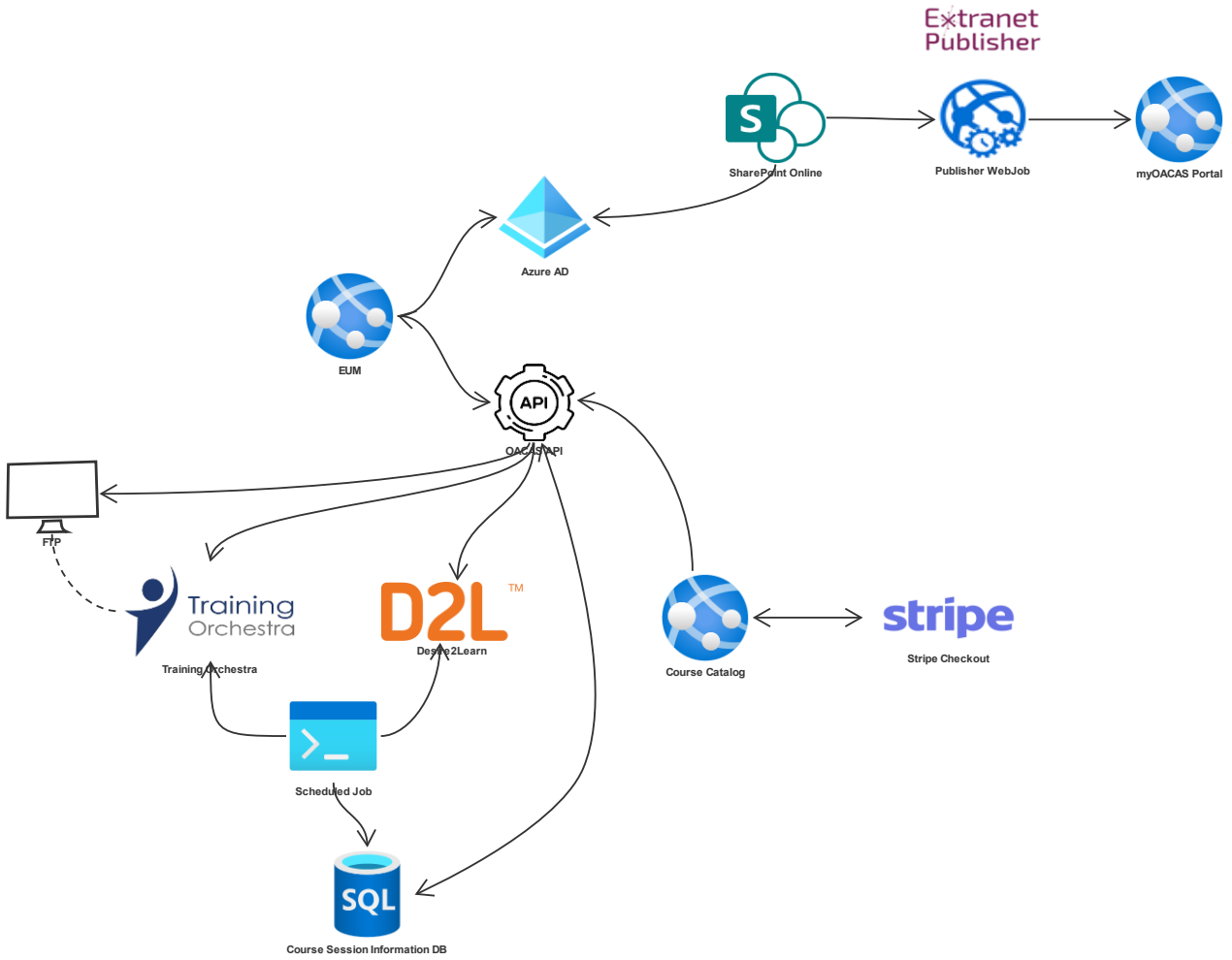
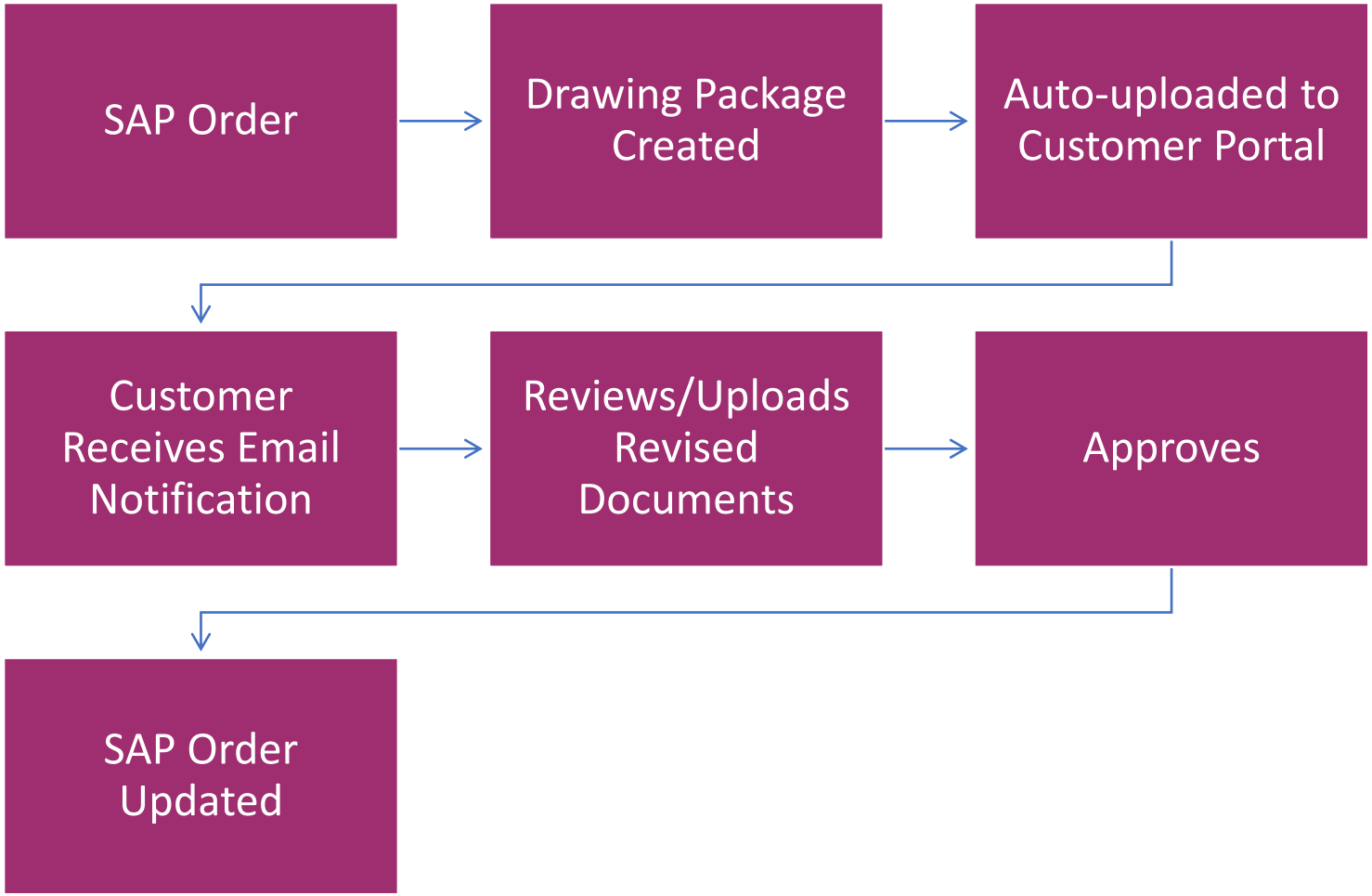
OACAS Solution Architecture

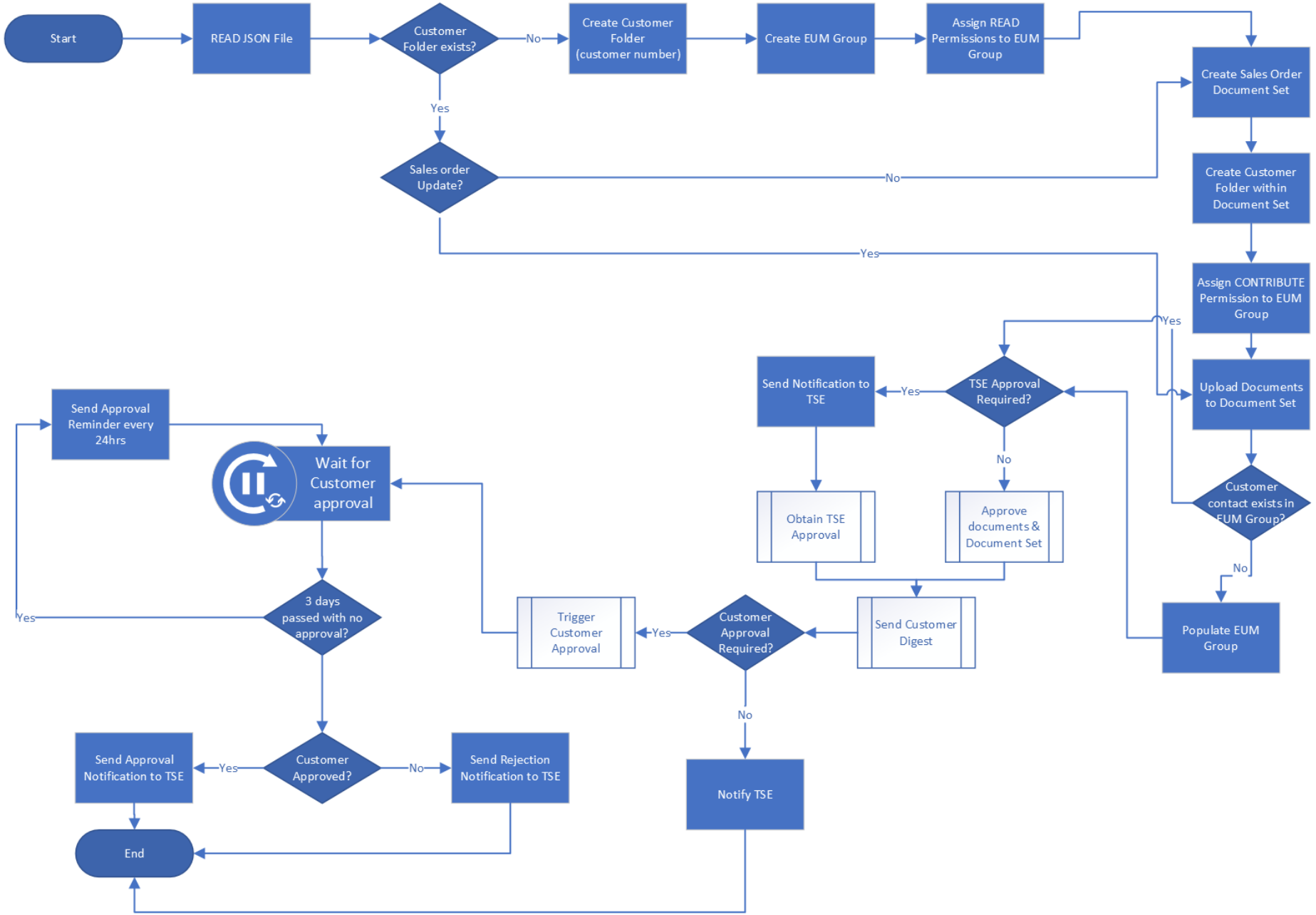


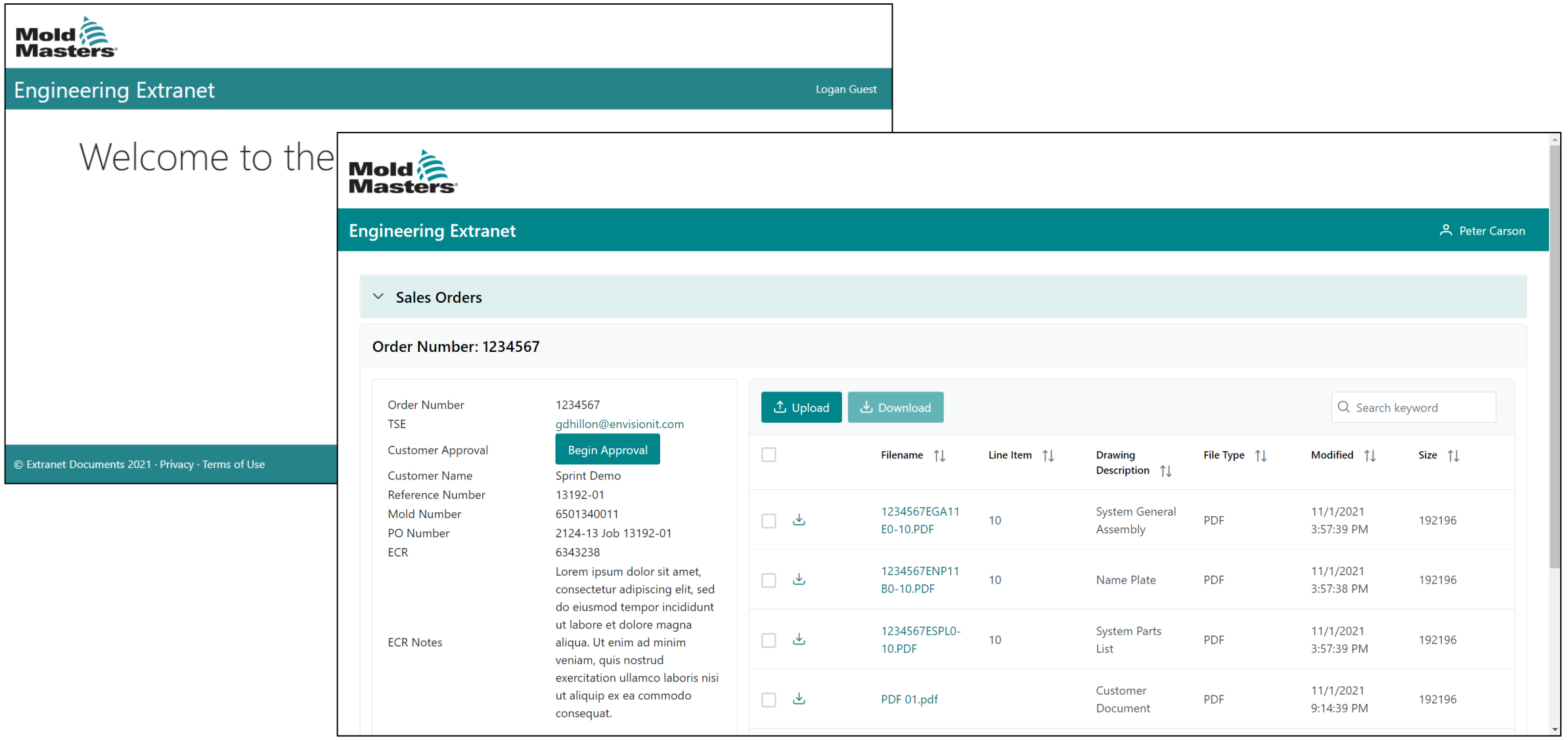
Scenario Three – Mold Masters: Engineering Extranet

- **Engineering 2D and 3D CAD drawings to be reviewed and approved by customers**
- **SAP integration**
- **Automation of drawing package preparation**
- **Workflow for approvals**
  - Internal engineering approval may be required first
  - Customer notification and approval
  - Reminder notifications
  - Approval completion updates SAP order status
- **Ability for customer to upload annotated or additional documents**

Member Management – Direct Invite through SAP




Start
READ JSON File
Customer Folder exists?
No
Create Customer Folder (customer number)
Create EUM Group
Assign READ Permissions to EUM Group
Create Sales Order Document Set
Create Customer Folder within Document Set
Assign CONTRIBUTE Permission to EUM Group
Upload Documents to Document Set
Customer contact exists in EUM Group?
No
Populate EUM Group
Yes
Sales order Update?
No
Yes
Yes
TSE Approval Required?
Yes
Send Notification to TSE
Obtain TSE Approval
No
Approve documents & Document Set
Send Customer Digest
Customer Approval Required?
Yes
Trigger Customer Approval
Wait for Customer approval
Send Approval Reminder every 24hrs
3 days passed with no approval?
Yes
Customer Approved?
Yes
Send Approval Notification to TSE
No
Send Rejection Notification to TSE
End
No
Notify TSE


Mold Masters
Engineering Extranet
Logan Guest
Welcome to the
© Extranet Documents 2021 · Privacy · Terms of Use
Mold Masters
Engineering Extranet
Peter Carson
Sales Orders
Order Number: 1234567
Order Number 1234567
TSE gdhillon@envisionit.com
Customer Approval Begin Approval
Customer Name Sprint Demo
Reference Number 13192-01
Mold Number 6501340011
PO Number 2124-13 Job 13192-01
ECR 6343238
ECR Notes Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
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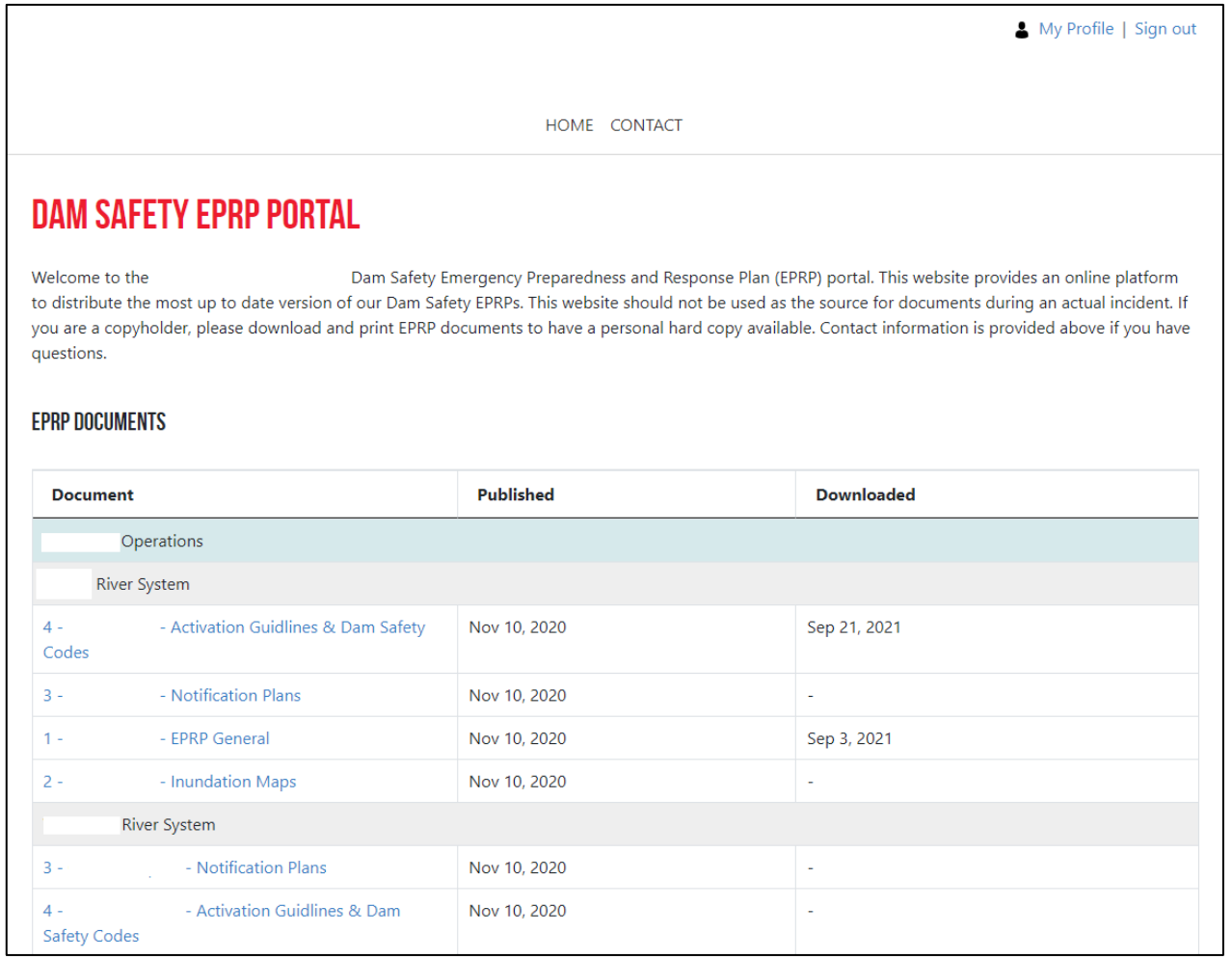
1234567EGA11E0-10.PDF 10 System General Assembly PDF 11/1/2021 3:57:39 PM 192196
1234567ENP11B0-10.PDF 10 Name Plate PDF 11/1/2021 3:57:38 PM 192196
1234567ESPL0-10.PDF 10 System Parts List PDF 11/1/2021 3:57:39 PM 192196
PDF 01.pdf Customer Document PDF 11/1/2021 9:14:39 PM 192196

Scenario Four – Public Utility Company EPRP Portal

- **Emergency Preparedness Response Plans (EPRP) to Community First Responders along river systems**
  - Police, fire, hospital, municipal
- **Documents authored in SharePoint Online and Published to Portal**
- **Email notifications sent to first responders of new documents**
- **Power BI dashboard download activity**
- **Business owners use in User Manager to directly invite First Responders**

Scenario Four – Distributing and Tracking Emergency Plans



My Profile | Sign out

HOME CONTACT

DAM SAFETY EPRP PORTAL

Welcome to the Dam Safety Emergency Preparedness and Response Plan (EPRP) portal. This website provides an online platform to distribute the most up to date version of our Dam Safety EPRPs. This website should not be used as the source for documents during an actual incident. If you are a copyholder, please download and print EPRP documents to have a personal hard copy available. Contact information is provided above if you have questions.

EPRP DOCUMENTS

Document	Published	Downloaded
Operations		
River System		
4 - - Activation Guidlines & Dam Safety Codes	Nov 10, 2020	Sep 21, 2021
3 - - Notification Plans	Nov 10, 2020	-
1 - - EPRP General	Nov 10, 2020	Sep 3, 2021
2 - - Inundation Maps	Nov 10, 2020	-
River System		
3 - - Notification Plans	Nov 10, 2020	-
4 - - Activation Guidlines & Dam Safety Codes	Nov 10, 2020	-

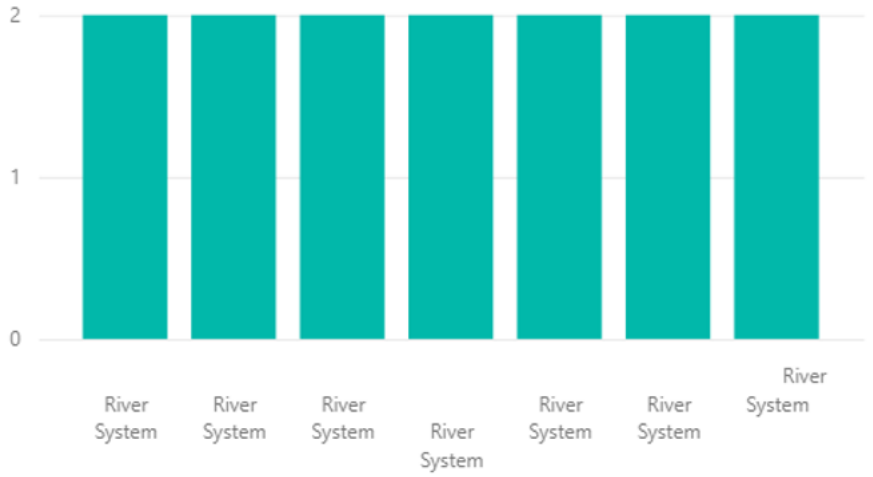
Date Published

30/01/2020 20/02/2020

Region

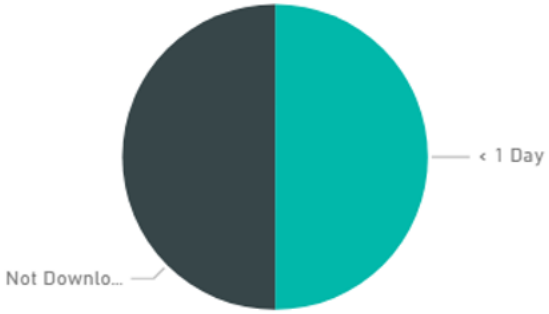
- [ ] Northeast Operations
- [ ] Northwest Operations

Published by River System

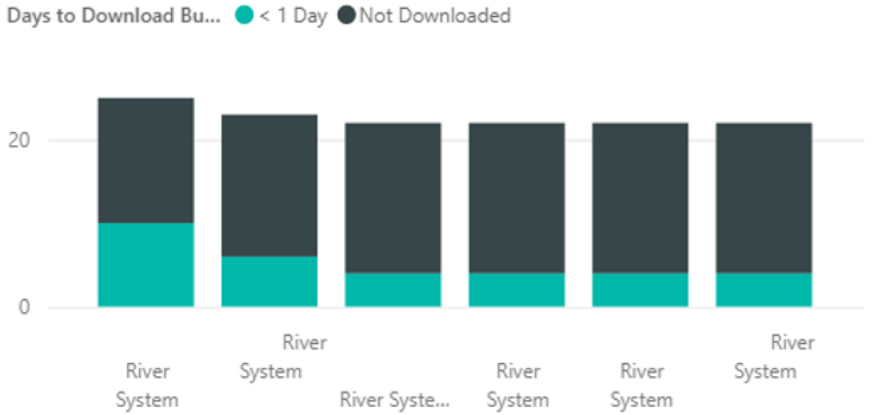


DisplayName	Downloaded	Not Downloaded
User10	12	0
User12	4	11
User13	0	12
User14	0	12
User15	0	12
User16	0	12
User17	0	12
User21	1	11
User22	3	10
User23	0	12
User6	12	0
Total	**32**	**104**

Number of Documents by Days to Download Bucket



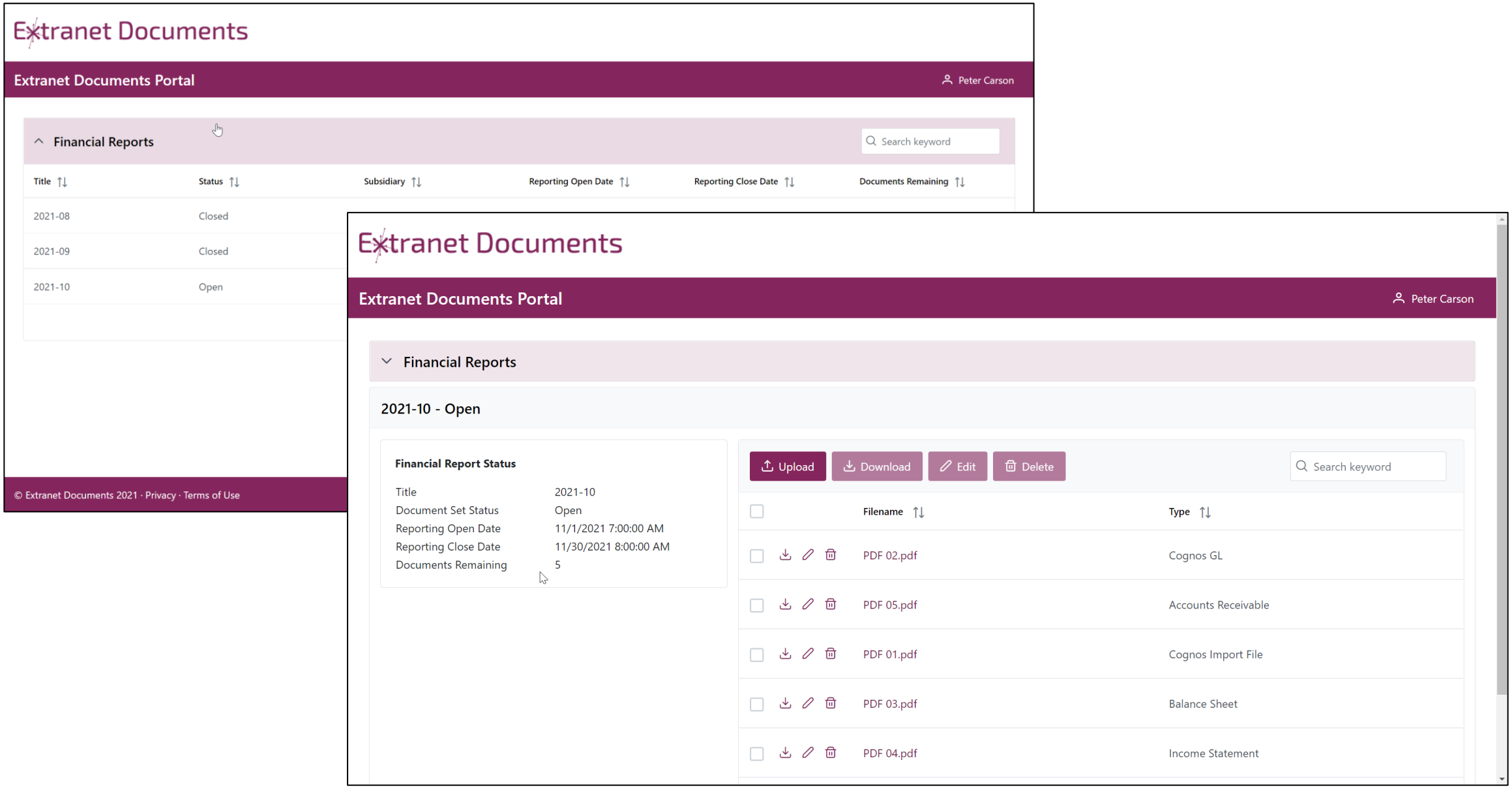
Downloaded by River System and Days to Download Bucket

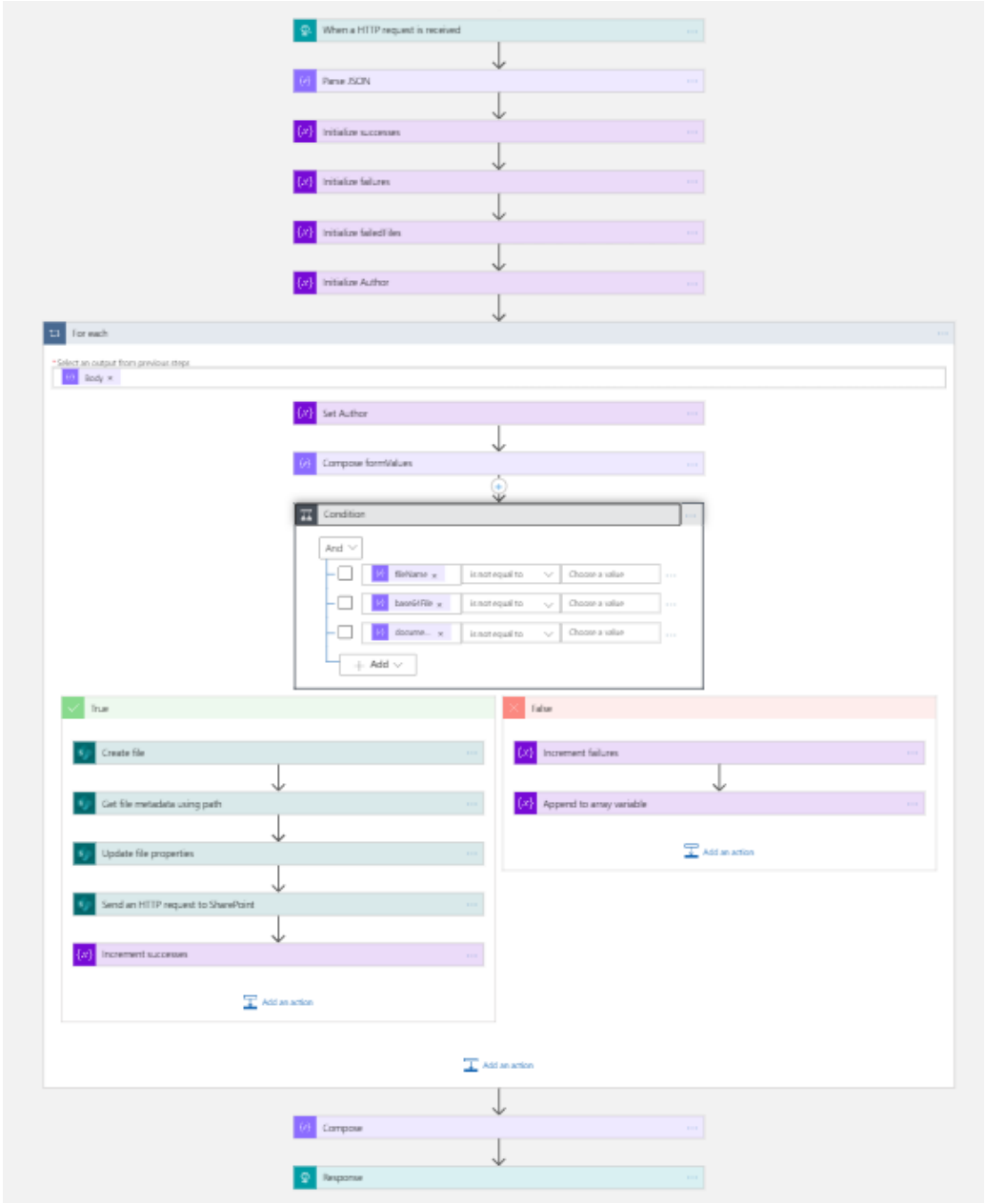


DisplayName	Document Name	Days to Download Bucket
User10	116-PLAN-ADM-0003 Rev 2	< 1 Day
User12	116-PLAN-ADM-0003 Rev 2	Not Downloaded
User13	116-PLAN-ADM-0003 Rev 2	Not Downloaded
User14	116-PLAN-ADM-0003 Rev 2	Not Downloaded
User15	116-PLAN-ADM-0003 Rev 2	Not Downloaded
User16	116-PLAN-ADM-0003 Rev 2	Not Downloaded
User17	116-PLAN-ADM-0003 Rev 2	Not Downloaded
User21	116-PLAN-ADM-0003 Rev 2	Not Downloaded
User22	116-PLAN-ADM-0003 Rev 2	Not Downloaded
User23	116-PLAN-ADM-0003 Rev 2	Not Downloaded
User6	116-PLAN-ADM-0003 Rev 2	< 1 Day
User10	116-PLAN-ADM-0004 Rev 2	< 1 Day
User12	116-PLAN-ADM-0004 Rev 2	Not Downloaded
User13	116-PLAN-ADM-0004 Rev 2	Not Downloaded
User14	116-PLAN-ADM-0004 Rev 2	Not Downloaded

Scenario Five – Financial Reporting Portal

- **Parent organization with dozens of subsidiaries**
  - Publicly traded
  - Subsidiaries are their own legal entities with independent financial reporting
- **Monthly, quarterly, annual, and audit reporting packages**
  - Strict schedules to collect, review, and roll up
- **Finance staff at subsidiaries may be responsible for one or multiple subsidiaries**


Extranet Documents
Extranet Documents Portal
Peter Carson
Financial Reports
Search keyword
Title
Status
Subsidiary
Reporting Open Date
Reporting Close Date
Documents Remaining
2021-08
Closed
2021-09
Closed
2021-10
Open
© Extranet Documents 2021 · Privacy · Terms of Use
Extranet Documents
Extranet Documents Portal
Peter Carson
Financial Reports
2021-10 - Open
Financial Report Status
Title
2021-10
Document Set Status
Open
Reporting Open Date
11/1/2021 7:00:00 AM
Reporting Close Date
11/30/2021 8:00:00 AM
Documents Remaining
5
Upload
Download
Edit
Delete
Search keyword
Filename
Type
PDF 02.pdf
Cognos GL
PDF 05.pdf
Accounts Receivable
PDF 01.pdf
Cognos Import File
PDF 03.pdf
Balance Sheet
PDF 04.pdf
Income Statement


When a HTTP request is received
Parse JSON
Initialize successes
Initialize failures
Initialize failedFiles
Initialize Author
For each
Select an output from previous steps
Body
Set Author
Compose formValues
Condition
And
fileName
is not equal to
Choose a value
base64File
is not equal to
Choose a value
docume...
is not equal to
Choose a value
Add
True
Create file
Get file metadata using path
Update file properties
Send an HTTP request to SharePoint
Increment successes
Add an action
False
Increment failures
Append to array variable
Add an action
Add an action
Compose
Response

Portals Built with the Extranet Suite

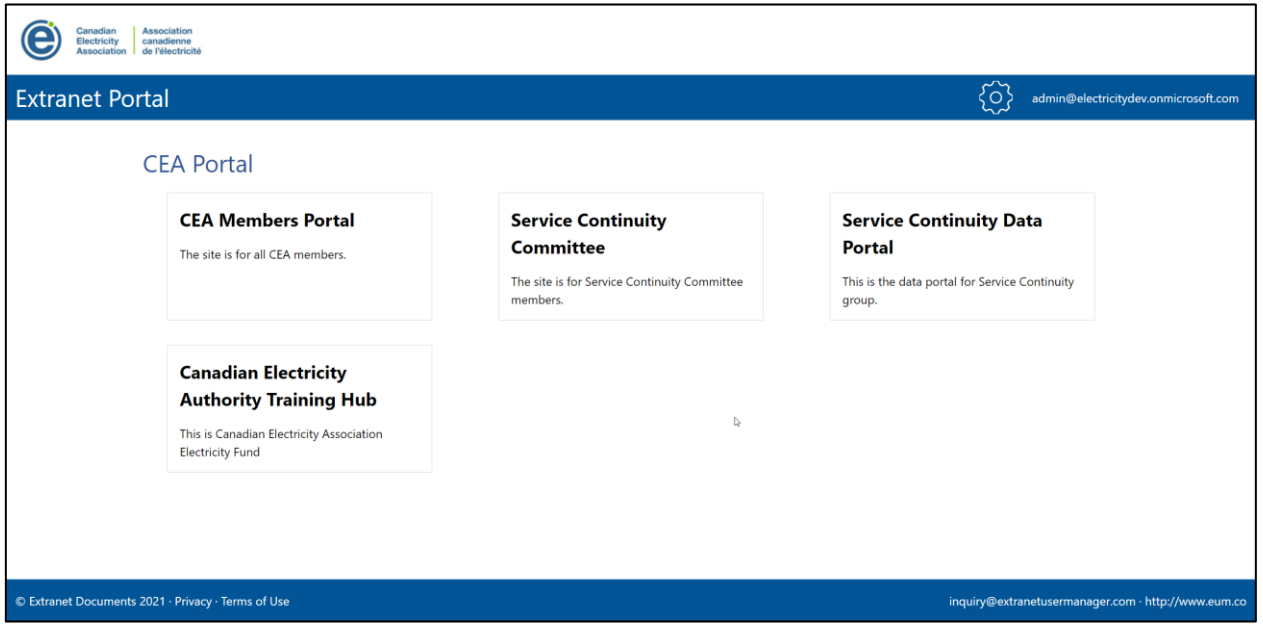
- **Portal**
  - External client facing portal
- **Documents**
  - Single spot to share or retrieve documents within the Portal
- **Publisher**
  - Integrated into the Portal to provide simple content authoring experience
- **User Manager**
  - Onboarding and management of users within the portal

Interested in Building a Portal for Your Organization?

- **Estimate Portal implementation timelines:**

2 Weeks	3 – 6 Weeks	12 – 16 Weeks
• OOTB Deployment • Light Branding	• Requirements Gathering • Custom Registration or Workflows	• Complex enterprise integrations • Data portals

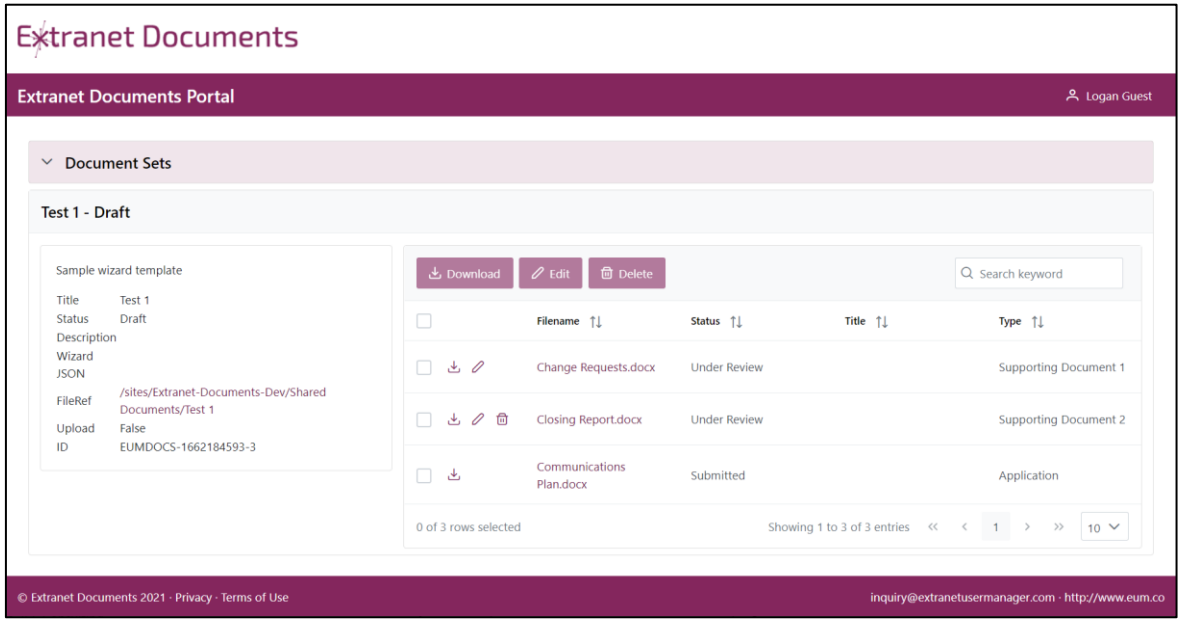
Portal



- Common landing spot for all external users
- Author public and private content
- Users can see what they have access to within the portal
- Integrates seamlessly with Documents, Publisher and User Manager

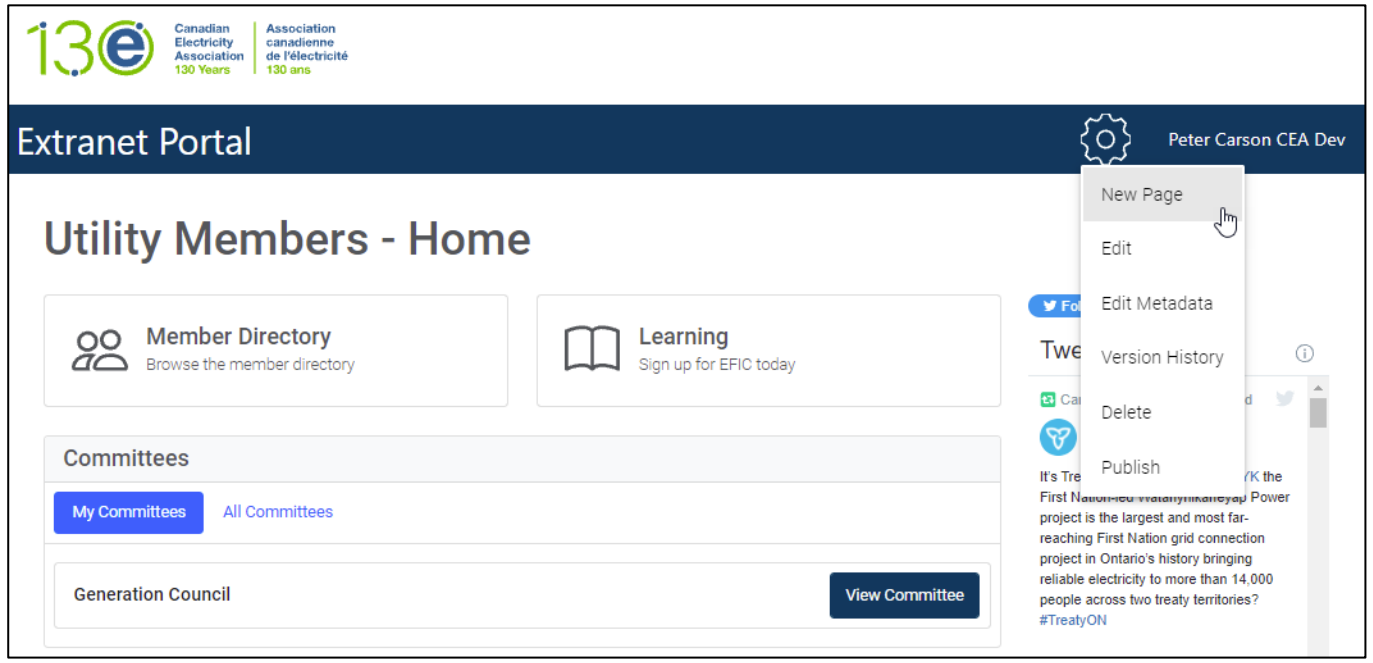
Documents

- **Eliminates the complexities of users accessing SharePoint Online**
- **Enables sharing and retrieval of documents with a broad user audience**
- **Sits on top of SharePoint Online**
  - Version history
  - Meta-data tagging
- **Document Sets are used to separate document packages**
- **Meta-data defines user rules**
- **Wizard shows important information surrounding the Document Set**

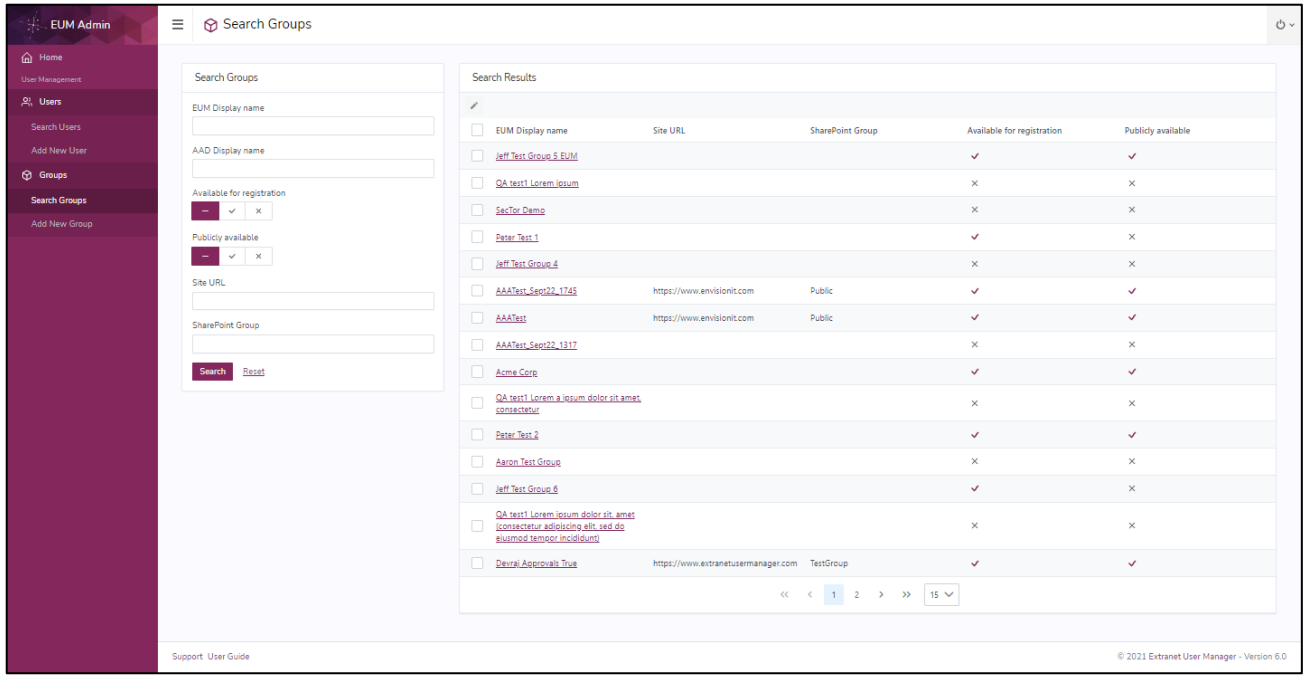


Publisher

- Simple authoring and publishing of documents and images directly in the portal
- Content Repo sits in SharePoint Online
- HTML translation and publishing of web pages
- Generate rollups and related images



User Manager



- User Manager provides the self-registration, profile management, and delegation
- As users and groups are created by the business owners, they are setup in Azure AD
- EUM sends customized email invitations
- Azure AD manages the login process
- Groups created in EUM can provide access to SharePoint sites, Teams, Document libraries, etc.

Next Steps

- **Webinar presentation slides and recording will be published to the event page by tomorrow**
- **Follow up email will include a link to a Microsoft Forms Poll**
  - We're interested in what you would like to learn more about
    - Would you like a technical session that goes deeper into how the products are built?
    - What are other sessions would you like us to host?
- **Schedule time with us to discuss your scenario**

Upcoming Events

SecTor IT Security Conference 2021

Oct. 30th – Nov. 3rd

European Collaboration Summit

Nov. 29th – Dec. 1st

Microsoft 365 Collaboration Conference

Dec. 7th – 9th

365EduCon: Washington DC

Dec. 12th – 16th

Thank you!

Questions?