



Create a Custom Learning Portal for Your External Users

Tuesday, January 25, 2025

1 - 2 PM Eastern Time

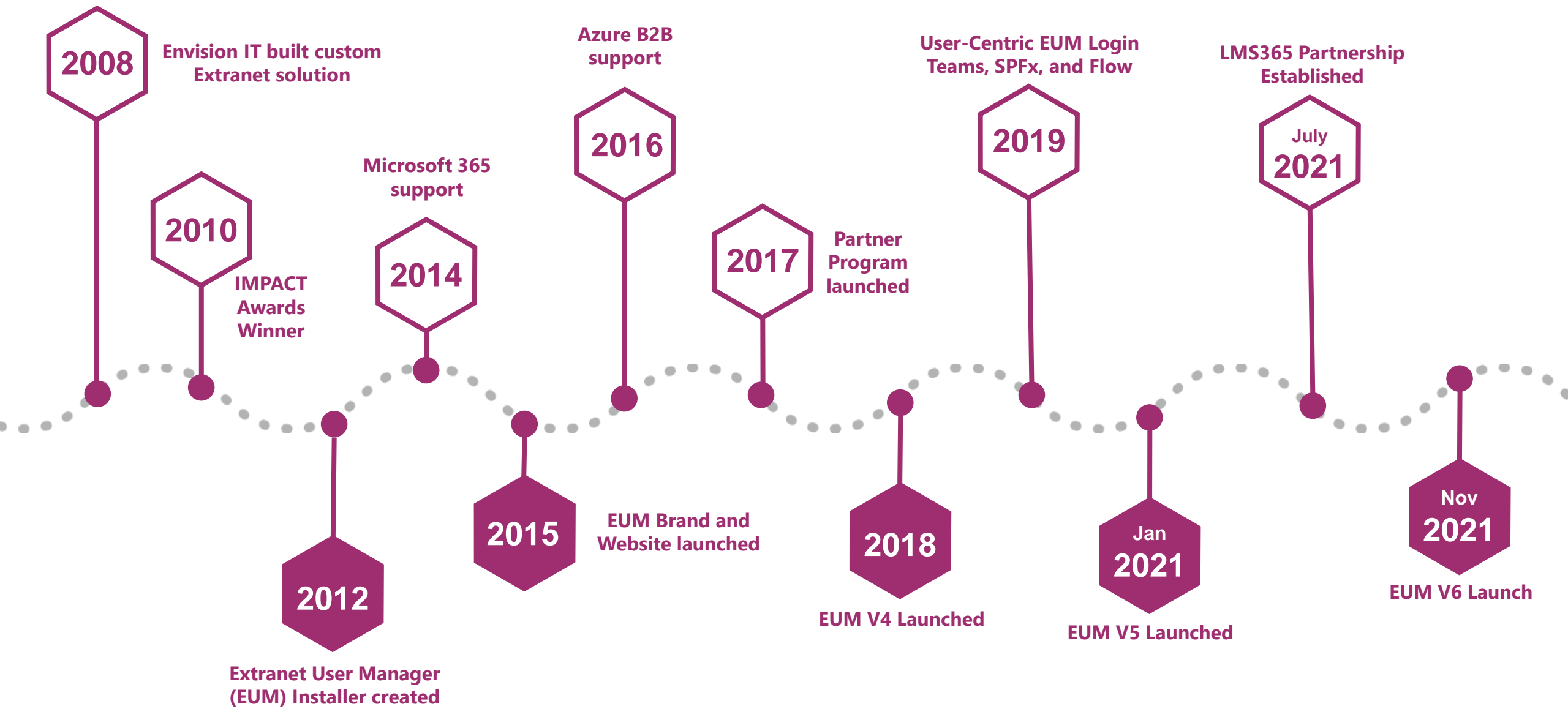
Logan Guest



- Sales and Marketing Manager, Extranet User Manager
- Clients include:
 - Ontario Power Generation
 - Canadian Red Cross
 - National Bank of Belgium
- Logan.guest@extranetusermanager.com
- www.extranetusermanager.com

Teams Meeting Etiquette

- **This is a regular Teams meeting**
- **Chat is open throughout the webinar**
- **Feel free to ask questions or make comments through chat at any time**
- **Please stay on mute. If you'd like to join the conversation, please ask on chat and wait for an invitation**
- **Welcome, enjoy, and learn!**



Customers around the Globe



100+ Customers Deployed Globally

Peter Carson



- President, Extranet User Manager
- Office Apps and Services Microsoft MVP
- peter.carson@extranetusermanager.com
- blog.petercarson.ca
- www.extranetusermanager.com
- Twitter @carsonpeter
- President Toronto SharePoint User Group



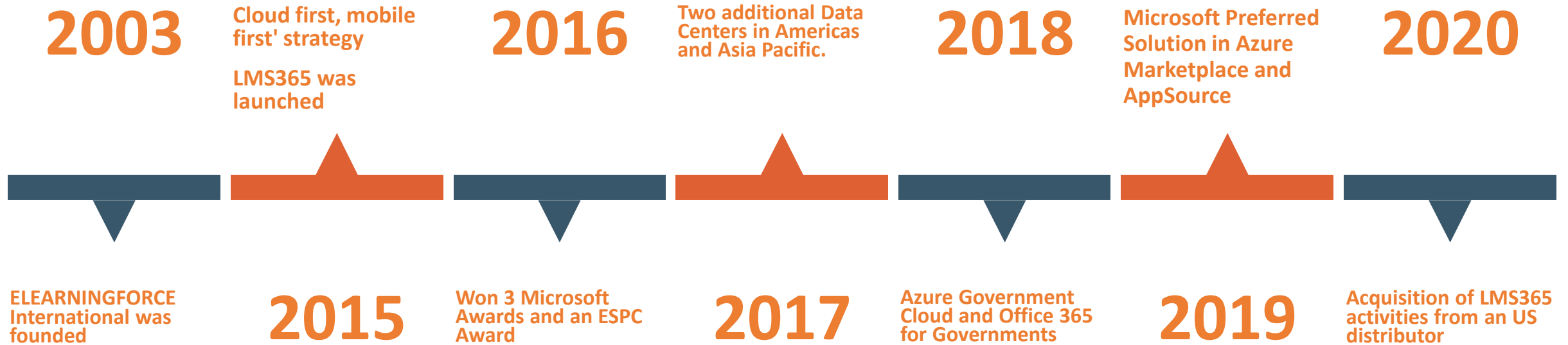
Aston Reyes



- Experienced Technical Consultant
- Over a decade of experience in the eLearning industry
- Provides clients consultation advice and best practices
- Responsible for the US government cloud service
- And yes, he's named after the Aston Martin car
- ar@lms365.com
- www.lms365.com

Our journey

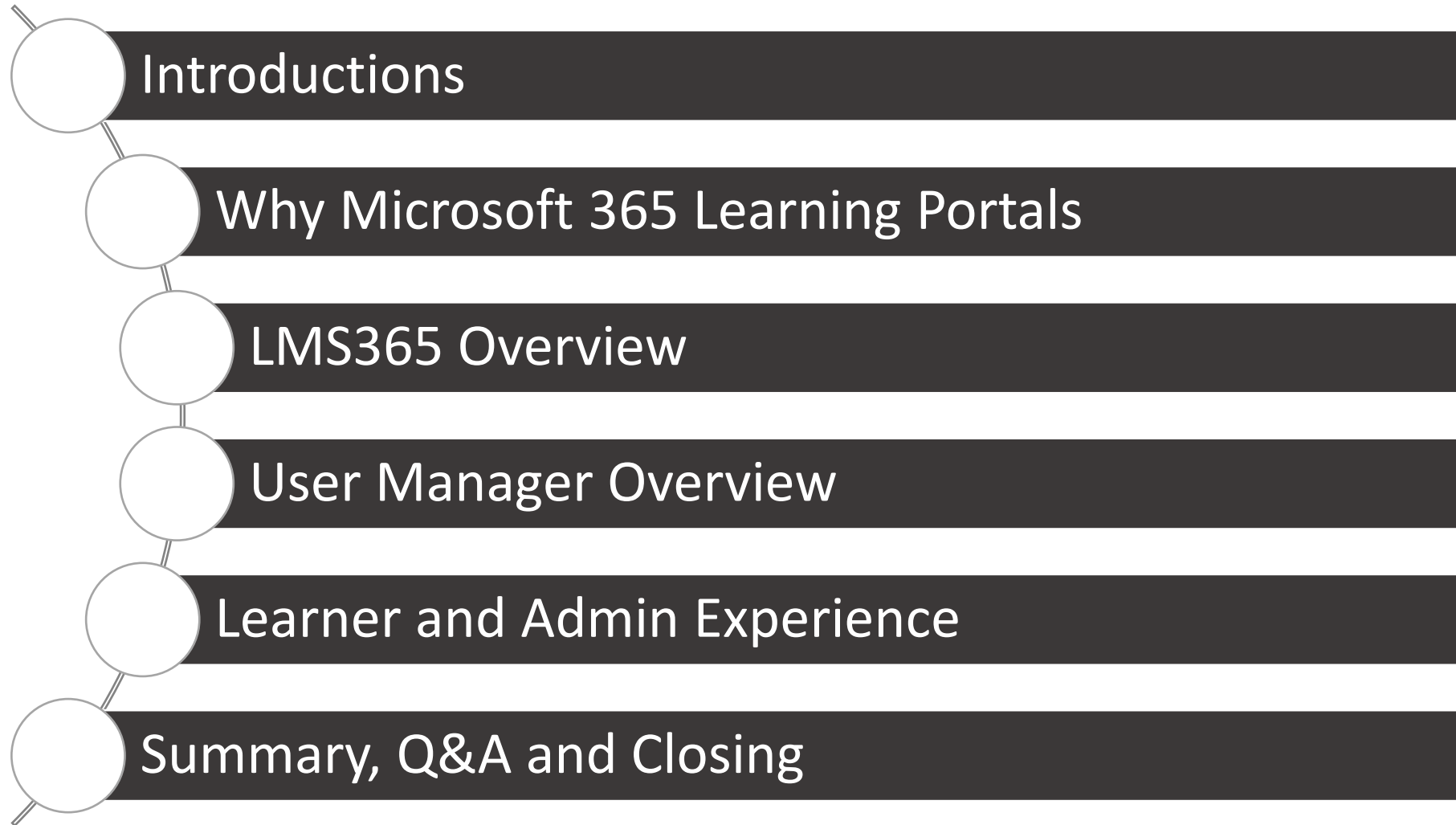
Highlights



This is LMS365 today



Agenda



Why Build a Learning Portal in Microsoft 365?

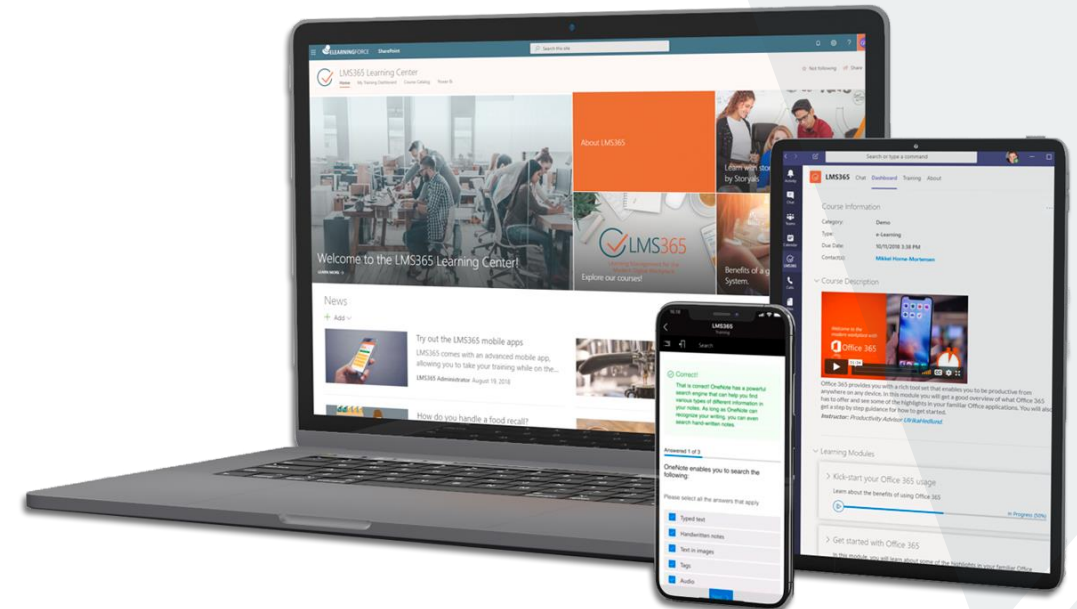
- **Microsoft 365 is already the spot your users are working and collaborating in**
- **You can build a robust LMS that relies on a strong Microsoft 365 foundation**
 - SharePoint Online
 - Teams
- **Leverage the Microsoft 365 Security and Compliance Azure Information Protection, Rights Management and document encryption**
 - Records retention
 - Multi-factor authentication and Conditional Access Policies
- **It's time to integrate how you're working with how you're training**

Training Portal Considerations

- Who are you providing external training to?
- Will everyone take the same set of courses?
- Will the LMS Admin be responsible for creating/approving new accounts?
- Will users be assigned courses or can they self discover courses?
- Is it just the LMS external users will be accessing?
- Are there any e-Commerce requirements?

Meet LMS365

- Microsoft recommended cloud-based Learning Management System for modern digital workplaces of all sizes
- **Only** learning platform **natively** built directly into Microsoft 365
- Deliver learning in multiple modalities in SharePoint, Teams, or mobile device
 - Could be online, classroom, webinar, blended, peer-to-peer, micro-learning, etc.
- Easily create and structure courses using any content from any repository
- Create multiple learning portals with different branding, administrators, rules, and audiences
- Certification management; competency management; notification management ; quizzing and assessment; gamification; social learning



LMS365 Training Options



Course Catalog

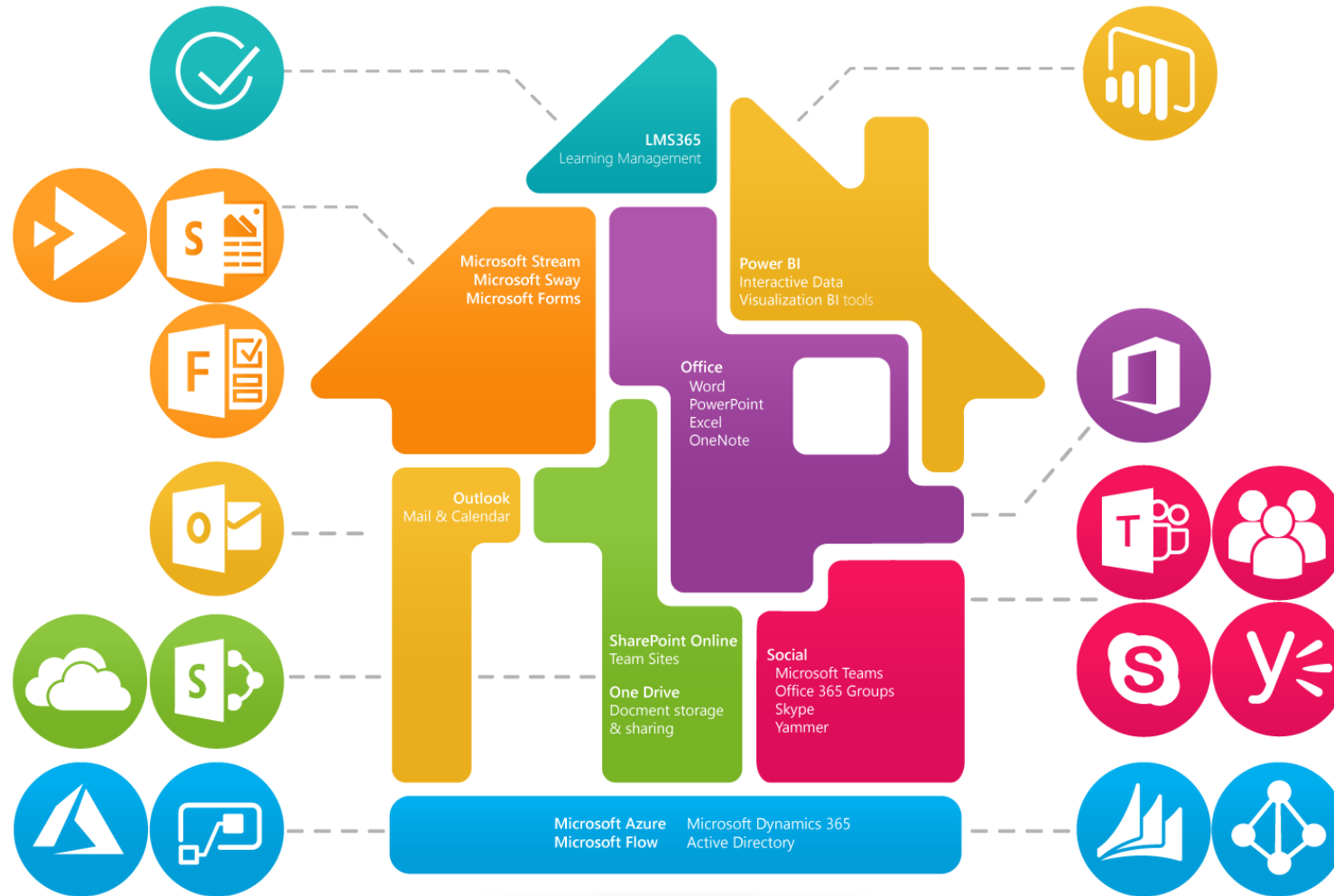


Training Plan



Individual Courses

Microsoft as part of Microsoft workplace



Learners access training through their favorite tools



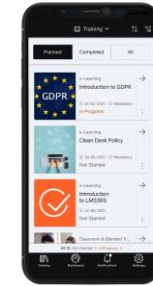
SharePoint

Rich browser-based learning experience through the Intranet or a training portal in SharePoint.



Microsoft Teams

Collaborative, social, peer-to-peer, video, chat, voice, in-context



Mobile Devices

Full-blown learning experience on any device. Download and complete training offline.

Why Extranet User Manager with LMS365?

EUM Portal

Home

Welcome to the LMS365 Portal

Explore a Course Catalog

Normally you'd be directly invited into this group, but we've set this demo up to allow you to join without approval, and immediately start experiencing all of LMS365 from a learner's perspective.

Once in, you're able to browse all the courses in the catalog, start exploring individual courses, and visit your training dashboard.

[Join Group](#)

Explore a Training Plan

We have setup approvals on training plans, which are a collection of courses assembled for a specific person or role. We'll be notified

Login

Get Started here!

Enter your email to login or register.

Email

pcarson@eumdemo.onmicrosoft.com

Remember Me

[Continue](#)

- Highly customizable for different users.
- Quick and easy to brand for your organization.
- Accommodate any user type or collaboration scenario when onboarding.
- Now your organization can easily engage with different users or groups.

Benefits of Extending LMS365 with EUM

- Empowers LMS365 Admins to manage external users with no reliance on IT
- Your brand is consistent across the welcome emails, portal interface and into LMS365/SharePoint
- Ability to automate onboarding of users into groups
- Permissions management is still handled by IT
- Can act as a landing spot for all things external – not just LMS365

User Manager Login Experiences

Existing Microsoft 365

- Logs in with their Azure AD credentials
- Seamless experience
- Single sign-on if already signed into Microsoft 365
- Also works for Microsoft accounts

Non-Microsoft 365

- One time passcode
- Emailed at sign-in
- Valid for 30 minutes
- Low friction, no new account to setup or password to remember
- Validates at each sign in that they still own the email address

Social User

- Federation with Google and Facebook accounts
- Same seamless login experience as Microsoft 365
- Need to be an @gmail.com address for Google Federation

User Registration Scenarios

Invitation Only

- Business owner knows who to invite
- Direct one of invitations
- Automated through integration with Dynamics, Salesforce, SAP

Private Registration

- Business owner knows someone who knows who to invite
- Private registration link that is not easily guessed
- Can be forwarded any number of times
- May or may not want approvals on registration
- May auto-approve based on email domain

Public Registration

- Anyone should be able to discover and register
- Typically linked from a public website page
- May or may not want approvals on registration
- May auto-approve based on email domain

Learner and Admin Experience

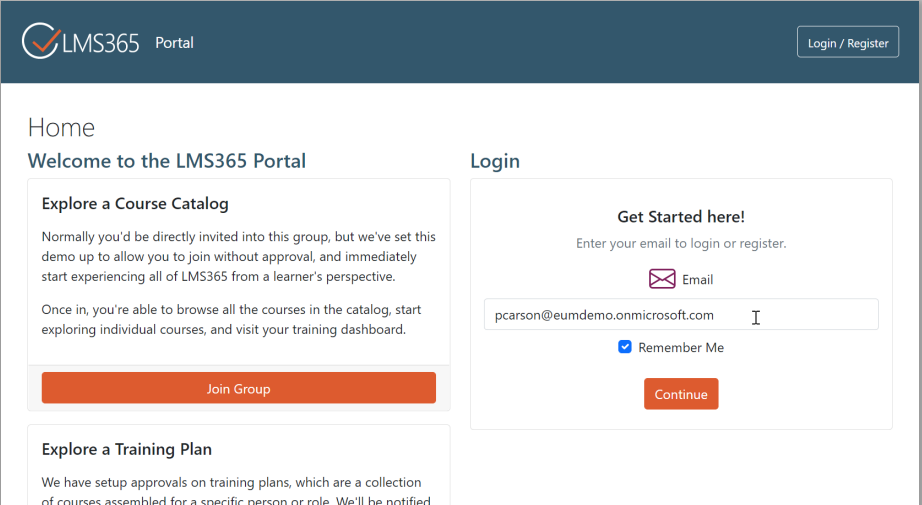
Learner Onboarding Demonstration

- **Direct Invitation**

- Learner Admin invites user from User Manager Admin adding user to Course Catalog group
- Learner receives custom welcome email
- Logs into LMS365 Course Catalog
- Learner browses LMS365 Course Catalog and Training Dashboard

- **Private Registration Groups**

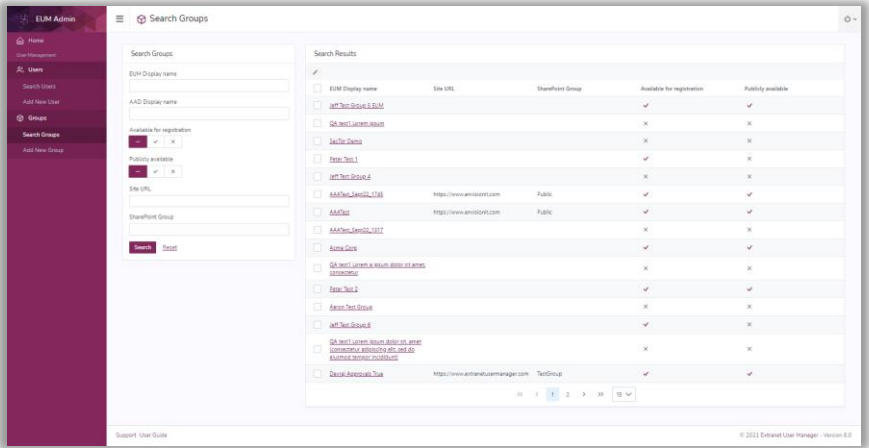
- Private link is shared with Learner
- Learner self-registers if they don't have an account already
- Approvals workflow is triggered when they request access to the Training Plan



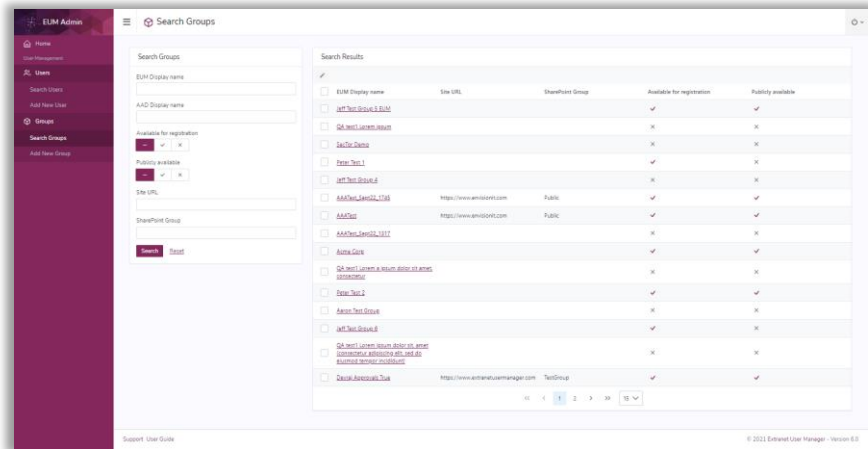
The screenshot shows the LMS365 Portal home page. The header includes the LMS365 logo and 'Portal' text, along with a 'Login / Register' button. The main content area is titled 'Home' and contains three sections:

- Welcome to the LMS365 Portal**: This section includes a sub-section 'Explore a Course Catalog' with a 'Join Group' button. The text explains that users are normally directly invited but can join without approval in this demo. It also mentions that users can browse all courses and visit their training dashboard once logged in.
- Login**: This section is titled 'Get Started here!' and prompts the user to enter their email to login or register. It features an email input field with the placeholder 'pcarson@eumdemo.onmicrosoft.com', a 'Remember Me' checkbox, and a 'Continue' button.
- Explore a Training Plan**: This section mentions that approvals are setup on training plans, which are collections of courses for specific roles.

Invitation Only



Private Registration



Private Registration



LMS365 Portal Login / Register

Training Plan

LMS365

We have created a Training Plan with a collection of courses you're required to take to become an expert in LMS365!

By joining the LMS365 Training Plan, you will be enrolled in the following courses:

- Warm Up
- Catalog Administrators
- Course Administrators
- M365 Tenant / LMS Administrators

Interested in learning more? Self register to enroll in the training plan.

[Join LMS365 Training Plan](#)

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LMS365 Portal Login / Register

Get Started here!

Enter your email to login or register.

Email

Remember Me

[Continue](#)

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LMS365 Portal Login / Register

Clients
Clients registration description.

Partners
Partners registration description.

Public
Public registration description.

Clients Registration

First Name *	Company Name *
<input type="text" value="Learner"/>	<input type="text" value="Acme Corp"/>
Last name *	Job Title *
<input type="text" value="Test"/>	<input type="text" value="Sales"/>
Email *	Organization Type *
<input type="text" value="learnertest@mailinator.com"/>	<input type="text" value="Public Sector and Government"/>
Business Phone *	Approx. Number of Users *
<input type="text" value="55555555"/>	<input type="text" value="300 - 499"/>
Country *	Comments *
<input type="text" value="Canada"/>	<input type="text" value="Interested in training"/>

[Register](#)

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Learner Onboarding Demonstration

- **Self Registration for E-Commerce Course**

- Learner self registers for E-Commerce Course
- Pay course fee through Stripe integration
- User is added to group and views confirmation member page
- User is brought directly into LMS365 course

The screenshot displays a multi-step registration and payment process. The top navigation bar includes 'Portal', 'Home', 'My Groups', 'Public Groups', 'About', and a 'Login / Register' button. The main heading is 'LMS 365 E-Commerce Training Course' with the LMS365 logo. The page content includes a 'TEST MODE' badge, the course title, a price of '\$100.00', and a 'Join Group' button. A payment modal is overlaid on the right, titled 'Pay with card', featuring an email field (logantest@mailinator.com), card information fields (number, MM/YY, CVC), name on card, billing address (set to Canada), and a 'Pay' button. A 'Save my info for secure 1-click checkout' checkbox is also present. The footer of the modal indicates 'Powered by stripe' and 'Terms Privacy'.

Public Registration

The screenshot shows the 'Home' page of the LMS365 Portal. It features a navigation bar with the LMS365 logo and a 'Login / Register' button. The main content area is divided into three sections: 'Welcome to the LMS365 Portal', 'Explore a Course Catalog', and 'Explore a Training Plan'. The 'Explore a Course Catalog' section includes a 'Join Group' button. The 'Explore a Training Plan' section provides information about training plans. A 'Login' section is also present, featuring a 'Get Started here!' heading, a prompt to enter an email, an email input field containing 'pcarson@eumdemo.onmicrosoft.com', a 'Remember Me' checkbox, and a 'Continue' button.



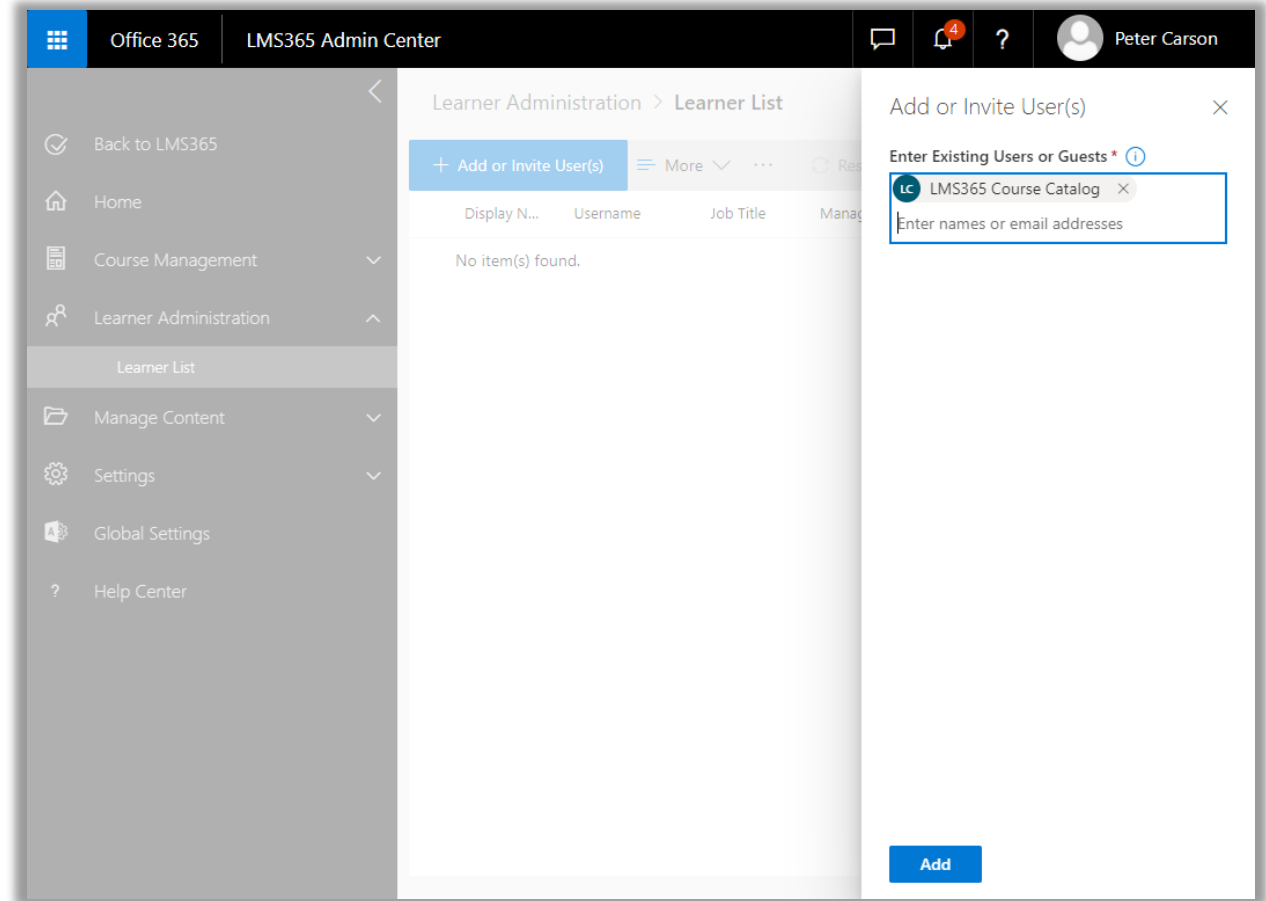
The screenshot shows the 'Training Plan' page. It features the LMS365 logo and a 'Login / Register' button. The main content area includes a heading 'Training Plan' and a sub-heading 'LMS365'. Below this, there is a paragraph stating 'We have created a Training Plan with a collection of courses you're required to take to become an expert in LMS365!'. This is followed by a list of courses: 'Warm Up', 'Catalog Administrators', 'Course Administrators', and 'M365 Tenant / LMS Administrators'. A 'Join LMS365 Training Plan' button is located at the bottom of the main content area. The footer contains copyright information and links for 'Privacy', 'Terms of Use', 'Trademarks', and 'DPA'.

The screenshot shows a 'Get Started here!' registration form. It features the LMS365 logo and a 'Login / Register' button. The main content area includes a heading 'Get Started here!' and a prompt to 'Enter your email to login or register.'. Below this is an email input field containing 'learnertest@mailinator.com', a 'Remember Me' checkbox, and a 'Continue' button. The footer contains copyright information and links for 'Privacy', 'Terms of Use', 'Trademarks', and 'DPA'.

The screenshot shows the 'Clients Registration' form. It features the LMS365 logo and a 'Login / Register' button. The main content area includes a heading 'Clients Registration' and a sub-heading 'Clients registration description.'. Below this is a registration form with the following fields: 'First Name *' (Learner), 'Last name *' (Test), 'Email *' (learnertest@mailinator.com), 'Business Phone *' (55555555), 'Country *' (Canada), 'Company Name *' (Acme Corp), 'Job Title *' (Sales), 'Organization Type *' (Public Sector and Government), 'Approx. Number of Users *' (300 - 499), and 'Comments *' (Interested in training). A 'Register' button is located at the bottom of the form. The footer contains copyright information and links for 'Privacy', 'Terms of Use', 'Trademarks', and 'DPA', along with a 'Contact Us' link and the website URL 'www.lms365.com'.

Admin Experience

- Admin is either a Group Owner or Membership Manager in User Manager
- Admin is Course Administrator in LMS365
- Admin is able to create Training Plans and Courses



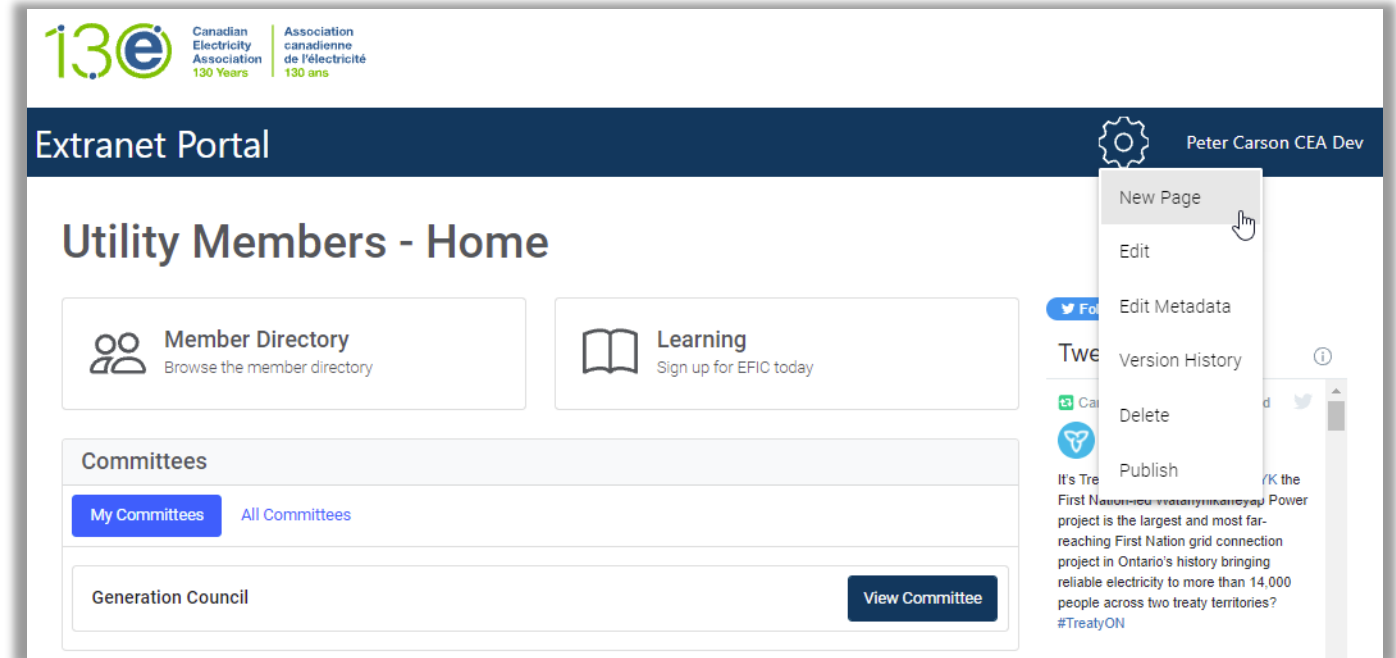
Portals Built with the Extranet Suite

- **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



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



The screenshot displays the Extranet Portal interface. At the top, there is a header with the 130e logo and text for the Canadian Electricity Association (130 Years) and the Association canadienne de l'électricité (130 ans). The main navigation bar includes the text "Extranet Portal" and a user profile for "Peter Carson CEA Dev".

The main content area is titled "Utility Members - Home" and features several sections:

- Member Directory**: A box with a person icon and the text "Browse the member directory".
- Learning**: A box with a book icon and the text "Sign up for EFIC today".
- Committees**: A section with two tabs, "My Committees" (active) and "All Committees". Below the tabs, there is a "Generation Council" entry with a "View Committee" button.

A context menu is open over a tweet on the right side of the page. The menu options are: "New Page", "Edit", "Edit Metadata", "Version History", "Delete", and "Publish". The "New Page" option is highlighted by the mouse cursor.

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
- Schedule time with us to discuss your scenario

Upcoming Events



[Teams First Approach to File Share and SharePoint Migrations](#)

February 15, 2022
12 – 1 pm EST



[Deploy Power BI Dashboards Internally and Externally without User Licensing](#)

March 22, 2022
12 – 1 pm EST

Thank you!

Questions?

