ExtranetUserManager

Board & Committee Management with MBNCanada

Tuesday, January 17th, 2023
12-1pm EST

Municipal Benchmarking Network Canada
Réseau d'étalonnage municipal du Canada

Logan Guest

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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!

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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

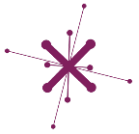
Azure B2B support

2017

Partner Program launched

2018

EUM V4 Launched

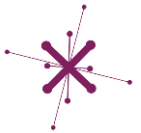


2019

User-Centric EUM Login Teams, SPFx, and Flow

Jan 2021

EUM V5 Launched



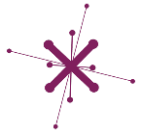
LMS365

LMS365 Partnership Established

July 2021

Nov 2021

EUM V6 Launched



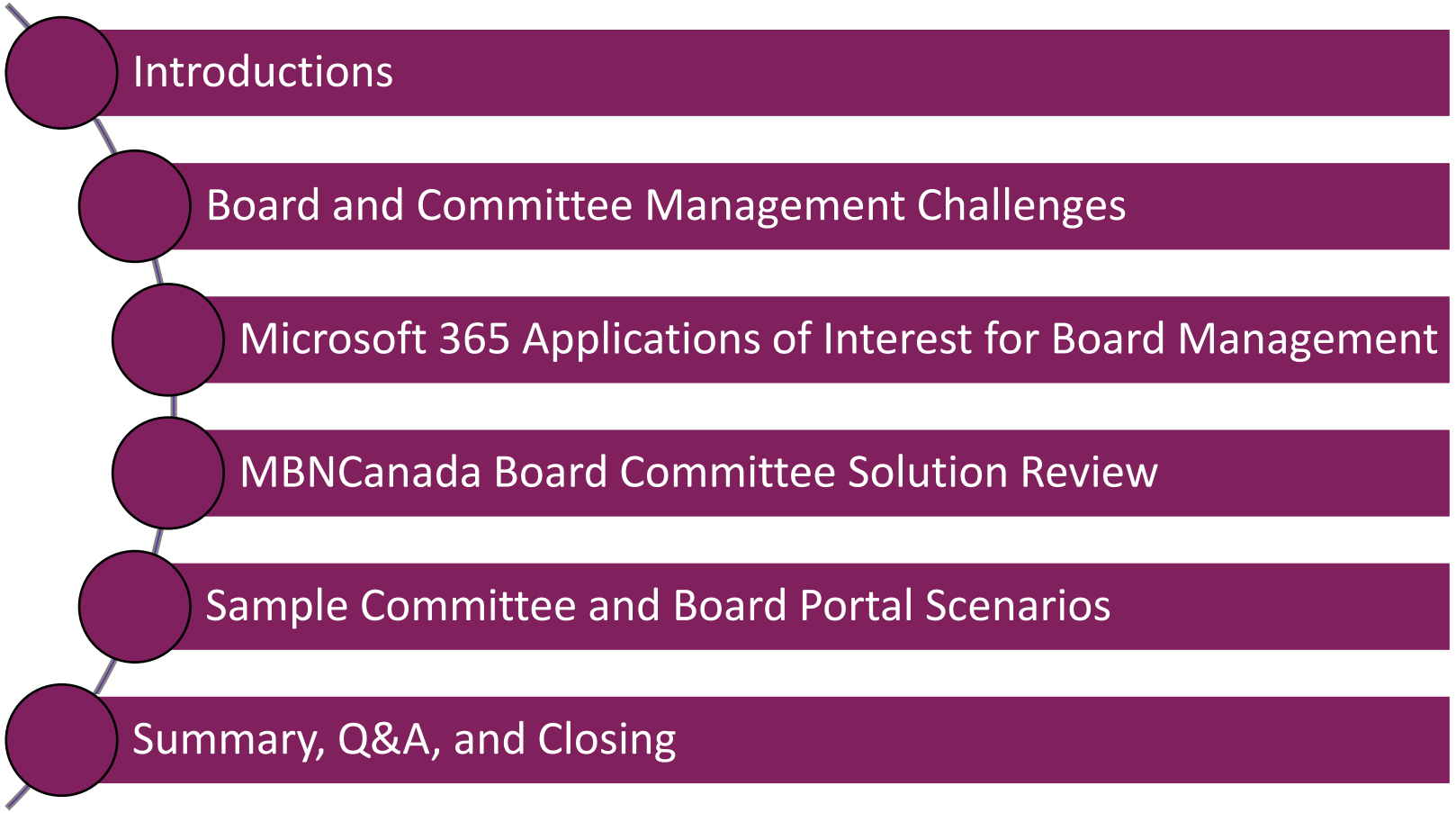
2022

EUM Platform Launch

Customers around the Globe

100+ Customers Deployed Globally

Agenda


Introductions
Board and Committee Management Challenges
Microsoft 365 Applications of Interest for Board Management
MBNCanada Board Committee Solution Review
Sample Committee and Board Portal Scenarios
Summary, Q&A, and Closing

Session Overview and Goals

Microsoft Teams as a board/committee communications hub

EUM Portal simplifies the experience for both members and owners

Committee members can access meeting info, archives, and member directory

Utilizing SharePoint Online to store meeting documents

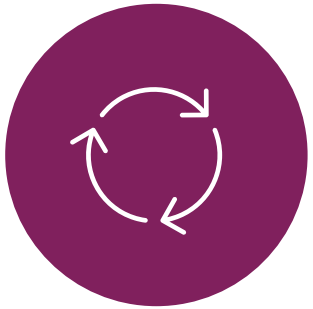
Committee organizers create meeting packages

EUM Admin creates new committees

Boards and Committees

Boards and Committees can take all types of different shapes

Often consist of users external to the organization



Meetings happen on a recurring basis

Packages have to be compiled and delivered to board members

Delivery methods include:

- Physical documents sent via mail
- Email
- Web portal
- Mobile App

Board & Committee Challenges

- Wide variety of technical abilities
  - Resistance towards technology/new technology
- Package creation is onerous and error-prone
  - Involves compiling multiple documents
- Email attachments are not ideal
- Members may be unfamiliar with the Microsoft 365 interface
- Post-meeting minutes and recordings need to be shared

Common Board and Committee Considerations

1. What is your board or committee structure?
2. How many board members?
3. Are users internal or external?
4. What is their comfort level with technology?
5. Are they licensed for Microsoft 365? External members do not need a license
6. Where are board member details stored?
7. What is your package assembly process?
8. How do you share meeting agendas and documents with members?
9. How do users access the documents?
10. Does access to meeting packages expire after meeting has taken place?
11. What is the sensitivity level of the documents, and how are they secured?

Leveraging Microsoft 365

EUM Portal as the Committee Home

Teams for online meetings

SharePoint as the repository

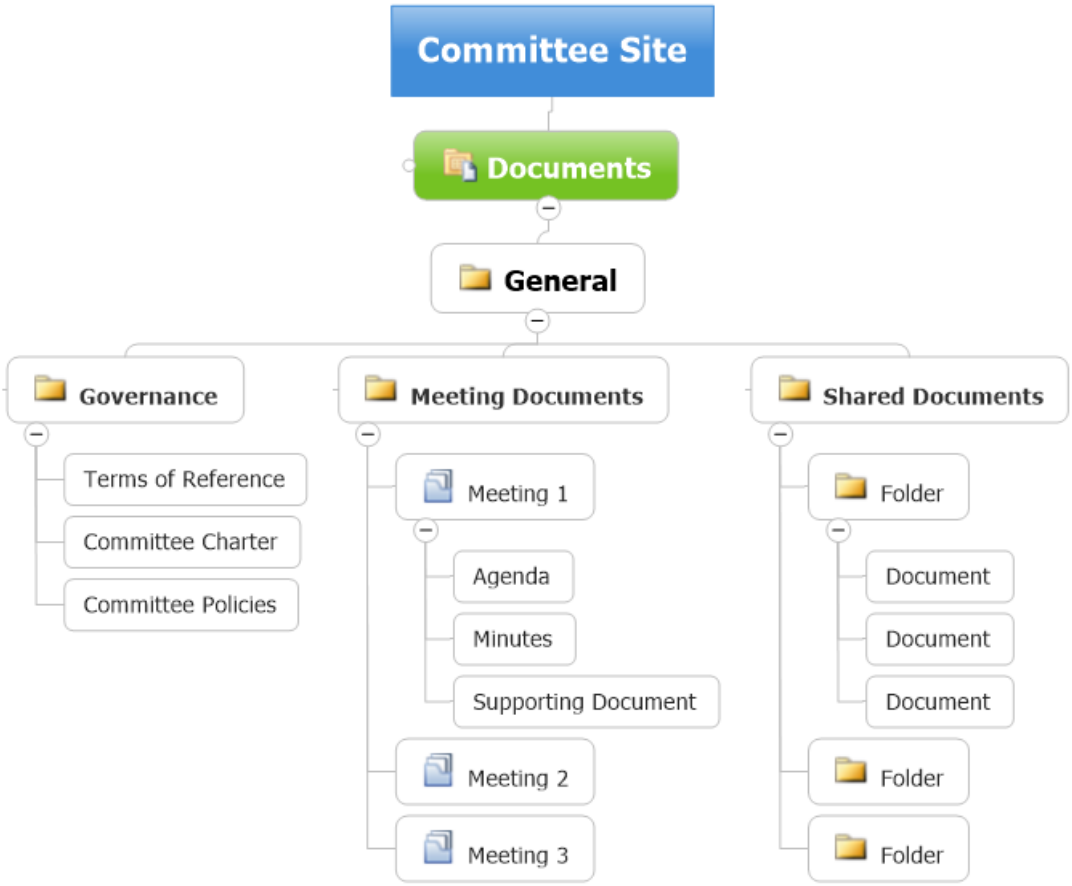
Exchange for calendar management

Power BI for committee reports

Stream on SharePoint for meeting recordings

Planner for task management

Committee Management Underlying Architecture



Who is MBNCanada?

- Not-for-profit association that supports municipal performance management through the provision of data collection, reporting and networking programs across Canada
- Collects 700 performance measures across 36 service areas on an annual basis
- Creates reports and data for municipalities, its board, and the general public

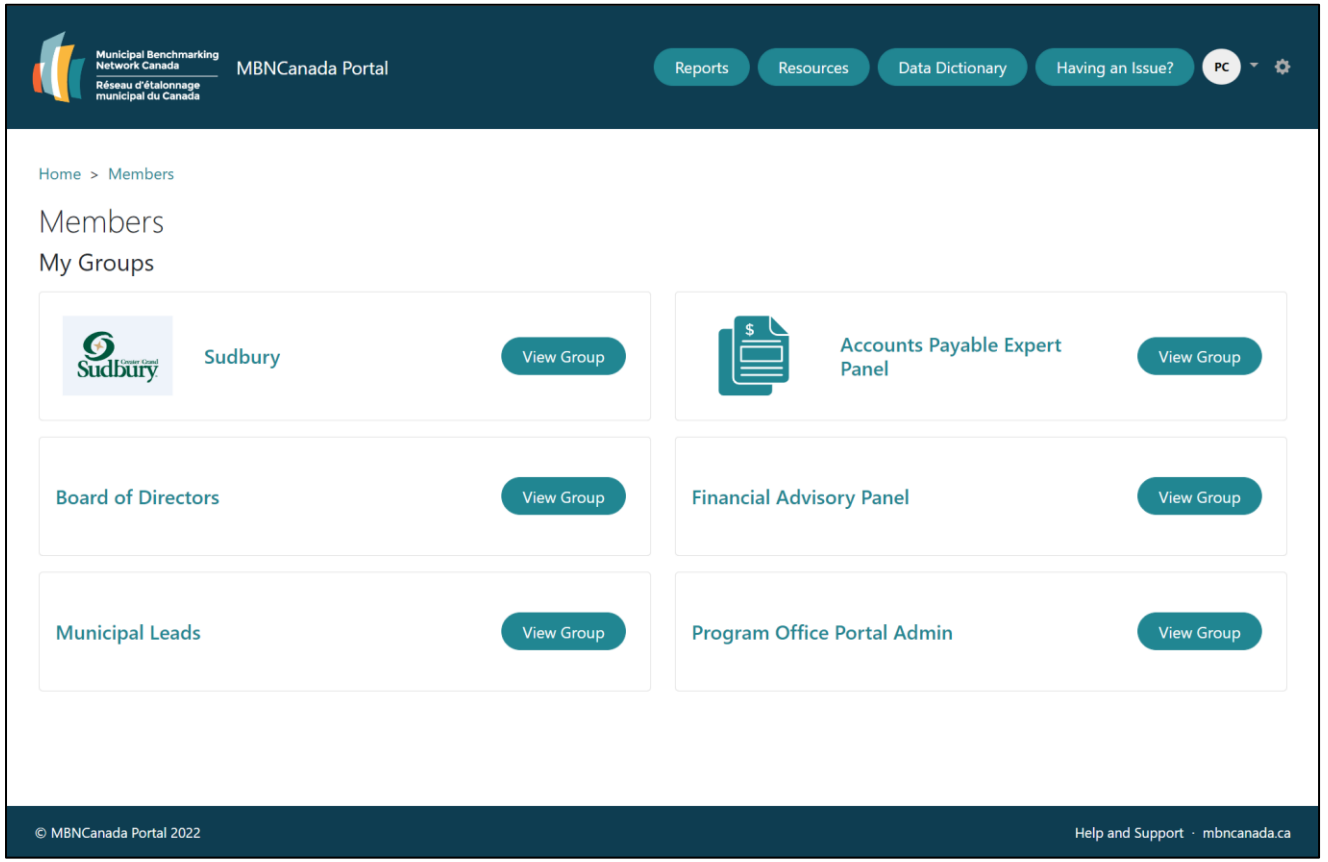
Mission: To enhance municipal service delivery though collaboration, networking and implementation of performance measurement, benchmarking and other municipal continuous improvement programs and initiatives

MBNCanada 2022 Portal Modernization

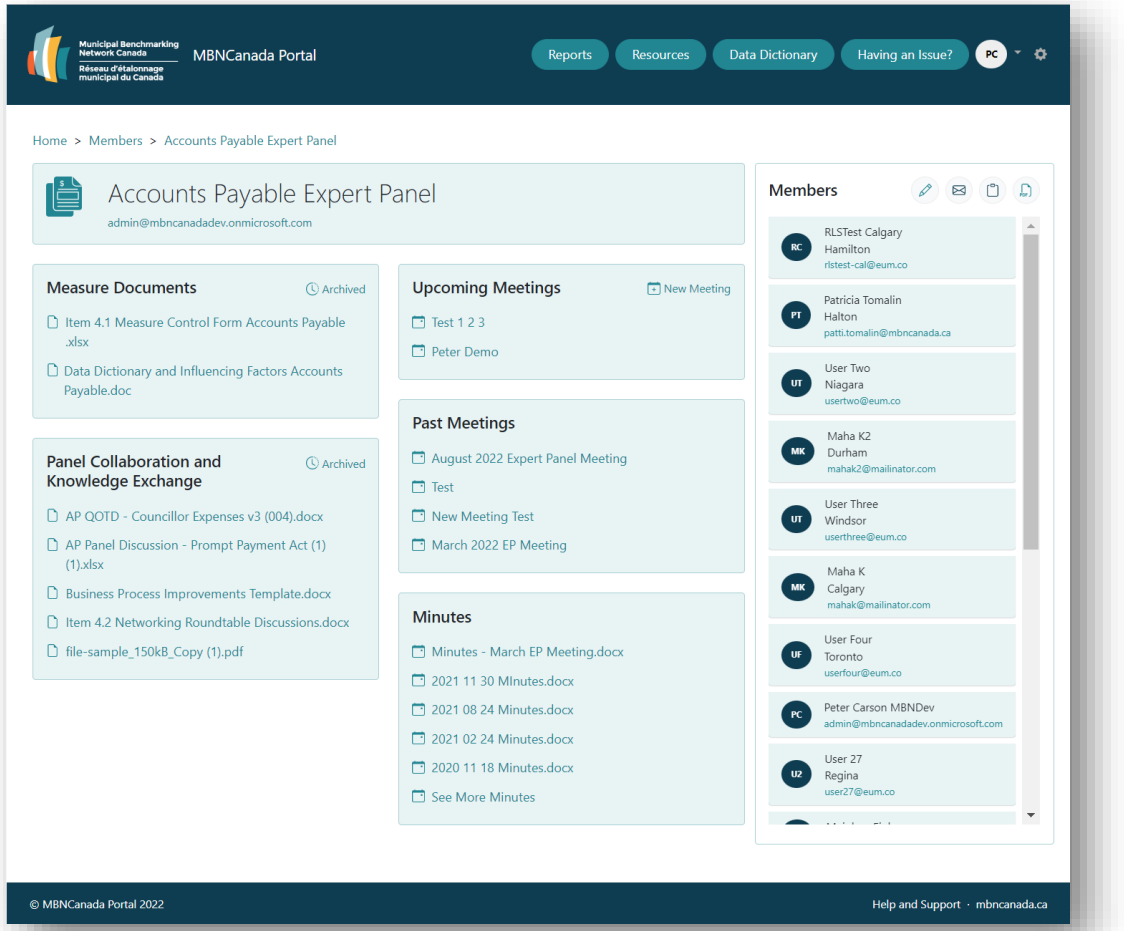
- Portal originally created in 2004 and hosted externally
- In 2022, project was launched to modernize the portal utilizing Microsoft 365
  - SharePoint, Teams, Power BI
- Utilizing Azure AD B2B to invite 1,000+ guests across the partner municipalities for data entry, reporting, committee and panel management
- MBNCanada staff invite Municipal Leads to Portal as Membership Managers
  - Municipal Leads manage their staff, and which panels they are on

EUM Board Portal Solution

- Landing spot for all board and committee members
- Members log in with their own credentials
- Committee members see what committees they have access to
  - Committees
  - Meetings
  - Communication Groups
  - Event calendars, etc.

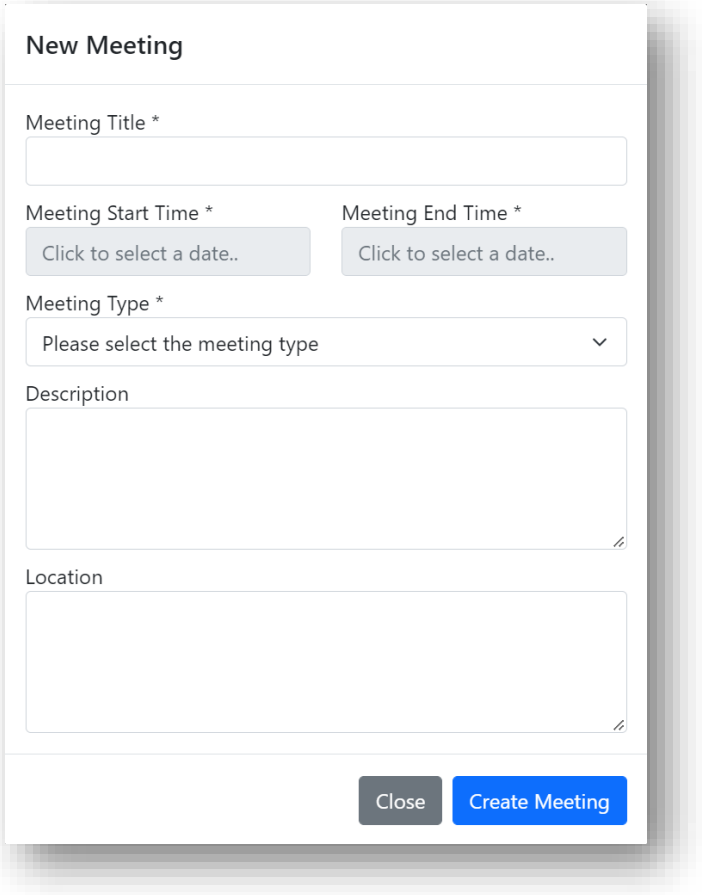


Committee Management



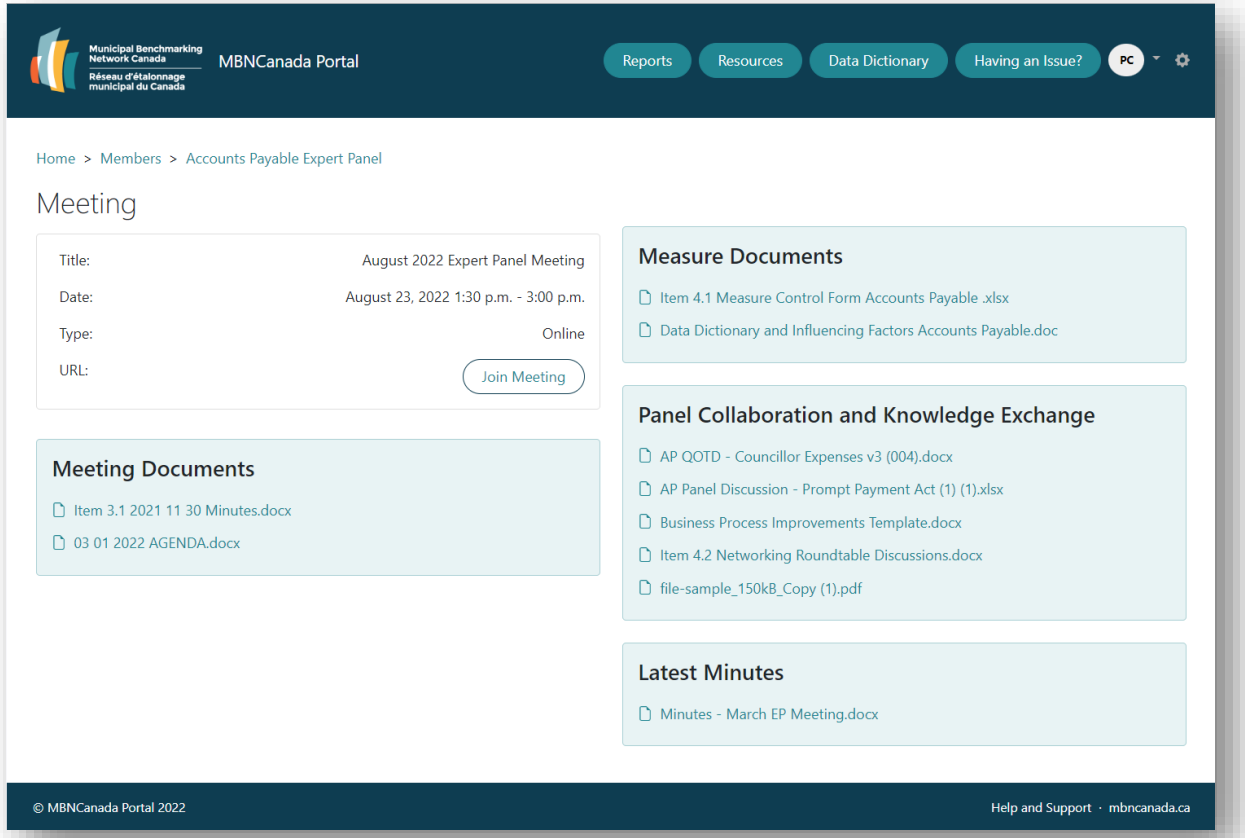
- EUM Group created for each committee
- Committee Page includes the following features:
  - General information about the committee
  - Links to important documents or files relevant to the committee
  - Link to a SharePoint library of archived documents
  - Listings of upcoming and previous committee meetings, linked to the details
  - Main committee contact
  - List of the committee members, and optionally their contact information

New Committee Meeting



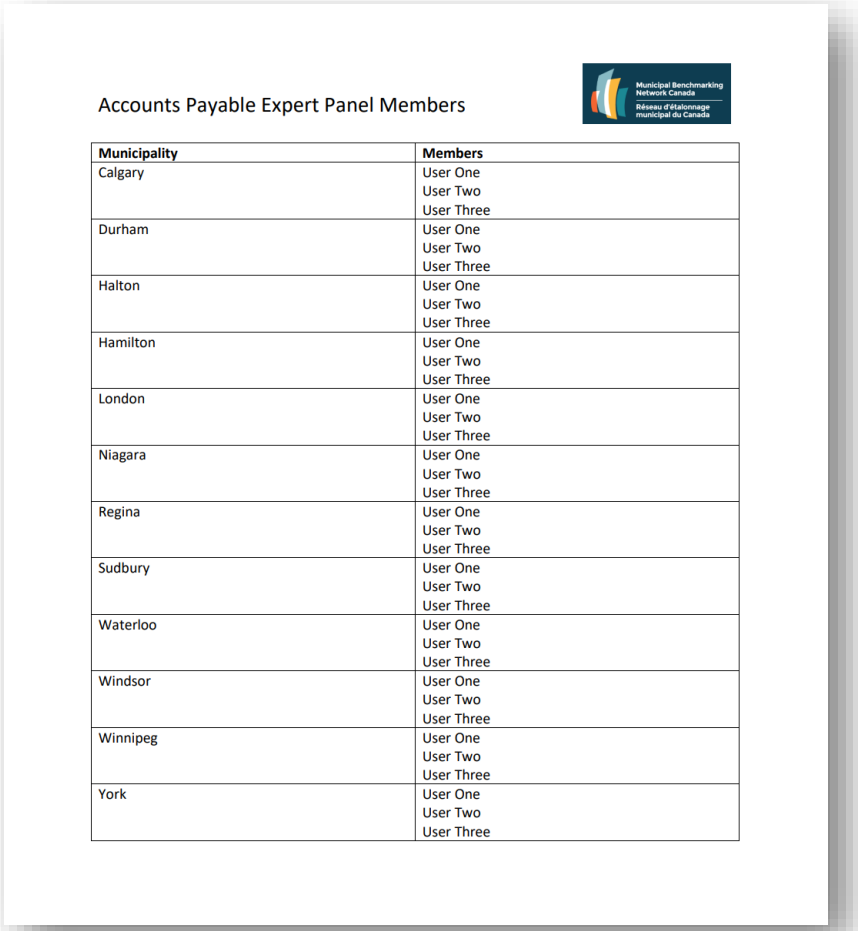
- Committee Owners see a button to launch new meeting web form
- Collects all required information in one page
- Workflow triggered that creates:
  - New meeting in the owner's own mailbox
  - Makes it a Teams meeting if it is online or hybrid
  - Creates a folder for the meeting documents
- Owner then populates the meeting documents and adds the meeting attendees

Committee Meeting Page



- Committee Owner uploads documents into meeting folder and updates calendar invite
- Once approved, workflow will add all committee members to invite and send out
- Both the branded Board Portal and calendar invite have the following links:
  - Meeting details
  - Teams Join Link
  - Relevant Document links

Committee Member Reports

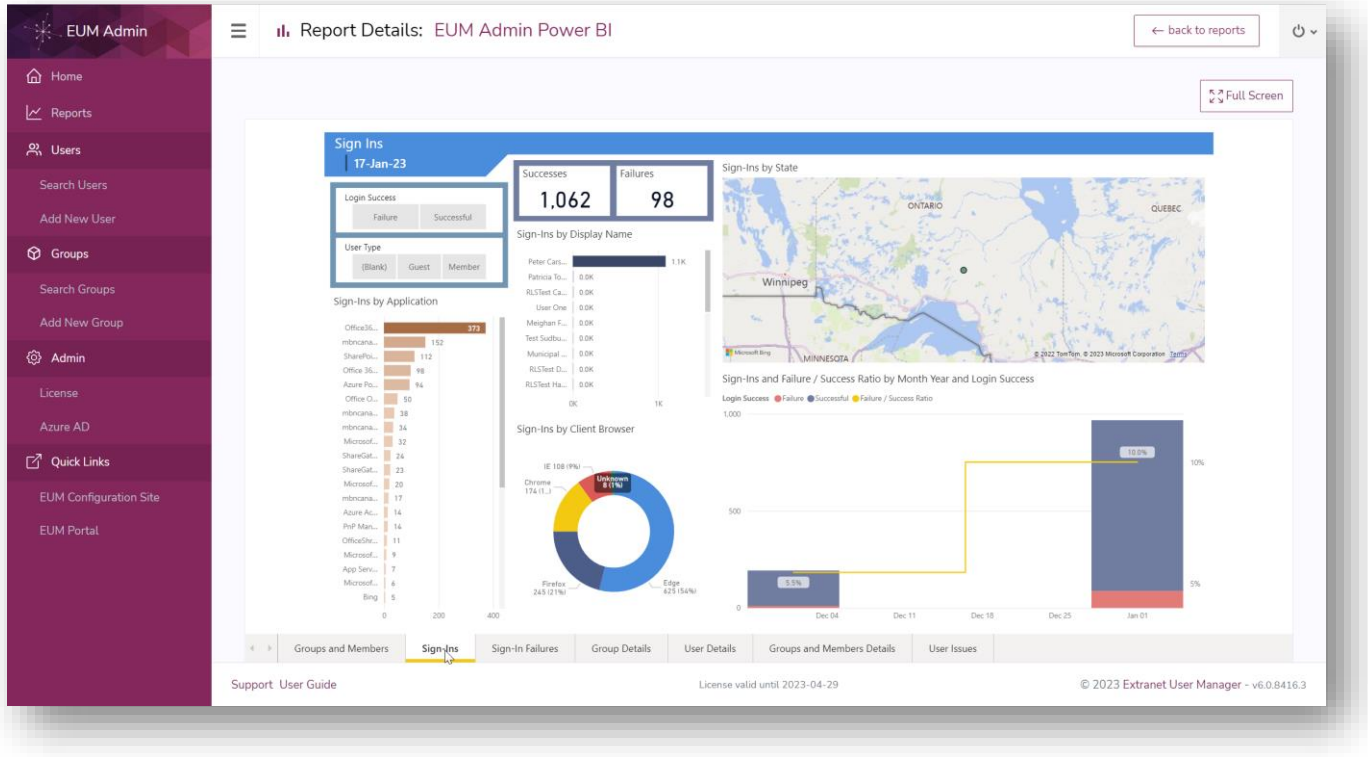


Accounts Payable Expert Panel Members

Municipality	Members
Calgary	User One User Two User Three
Durham	User One User Two User Three
Halton	User One User Two User Three
Hamilton	User One User Two User Three
London	User One User Two User Three
Niagara	User One User Two User Three
Regina	User One User Two User Three
Sudbury	User One User Two User Three
Waterloo	User One User Two User Three
Windsor	User One User Two User Three
Winnipeg	User One User Two User Three
York	User One User Two User Three

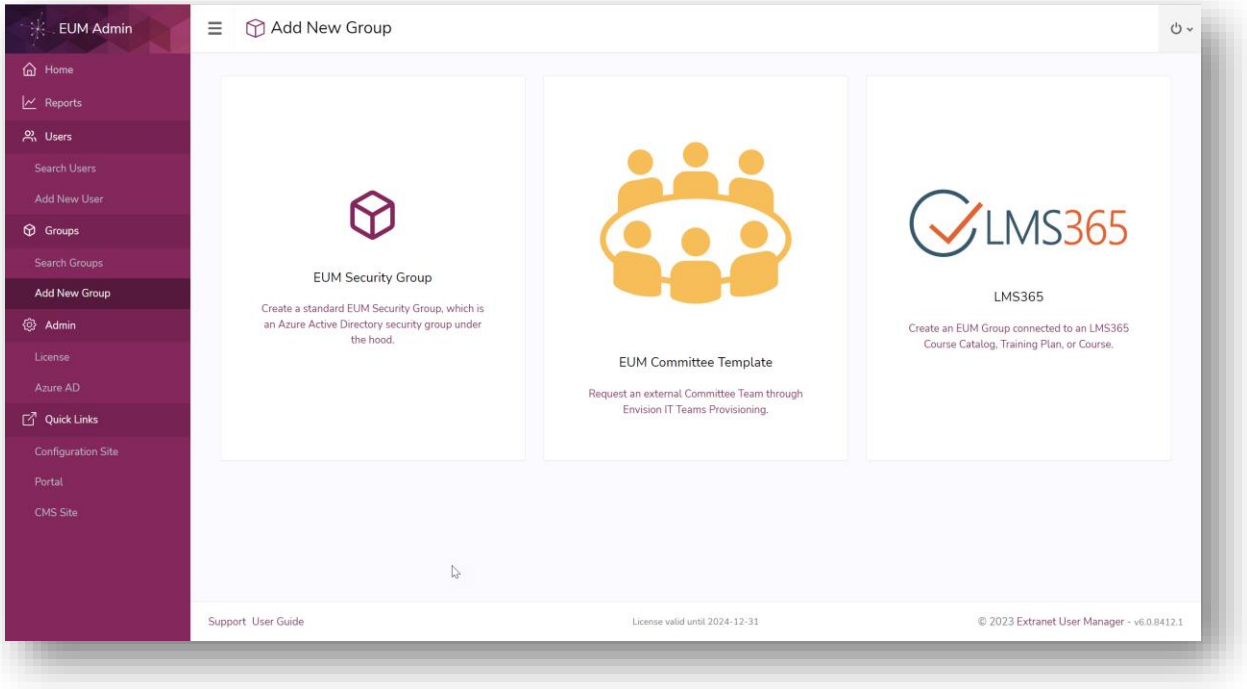
- PDF report generated from committee members
- Customizable through Power BI Report Builder
- Leverages the EUM Admin Power BI Report

EUM Admin Power BI



- Allows business owners and administrators to view activity
- Security applied so users only see what they're allowed
- Full audit history of sign-in activity from Azure AD

Create New Committees in EUM Admin



- Committee owner can create net new committees with EUM Admin Teams Provisioning
- Membership Managers can be delegated to for each committee in the EUM Admin tool
- Author rich content directly in EUM Admin using the intuitive, no-code CMS function

Implementation and Costs

Board Portal Build Phases

Planning

- Gather and Document Requirements
- Information Architecture
  - Teams
  - Channels
  - SharePoint Sites

Building

- Build Committee Teams/Sites
- EUM Portal and User Manager Deployment
- Portal Branding
- Set up Committee Groups

Deploying

- Production Deployment
- Training
- Member Onboarding

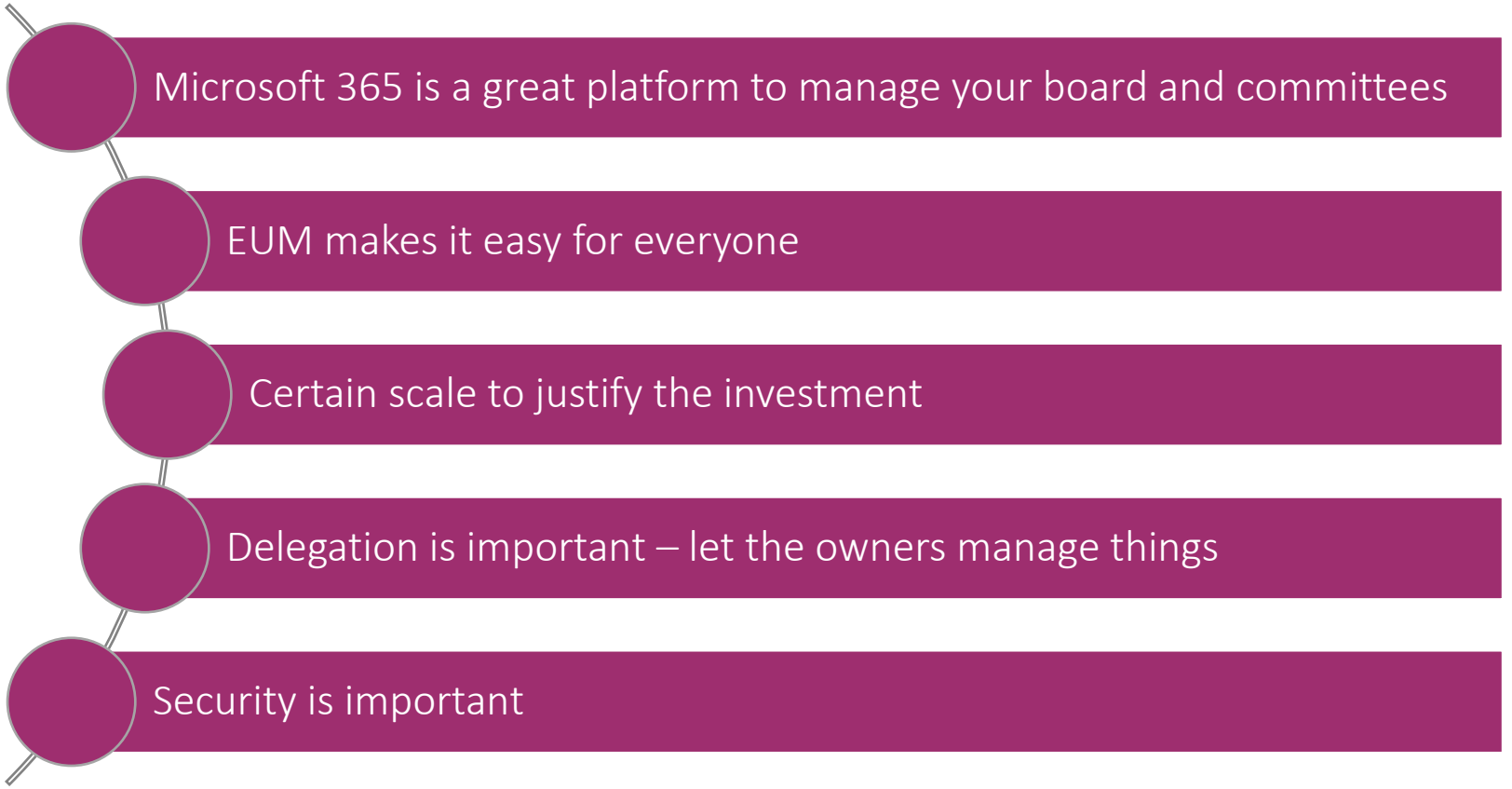
Estimated Pricing for <1,000 members

Installation	Annual Subscription Licensing
$7,000	$13,380

https://www.extranetusermanager.com/pricing

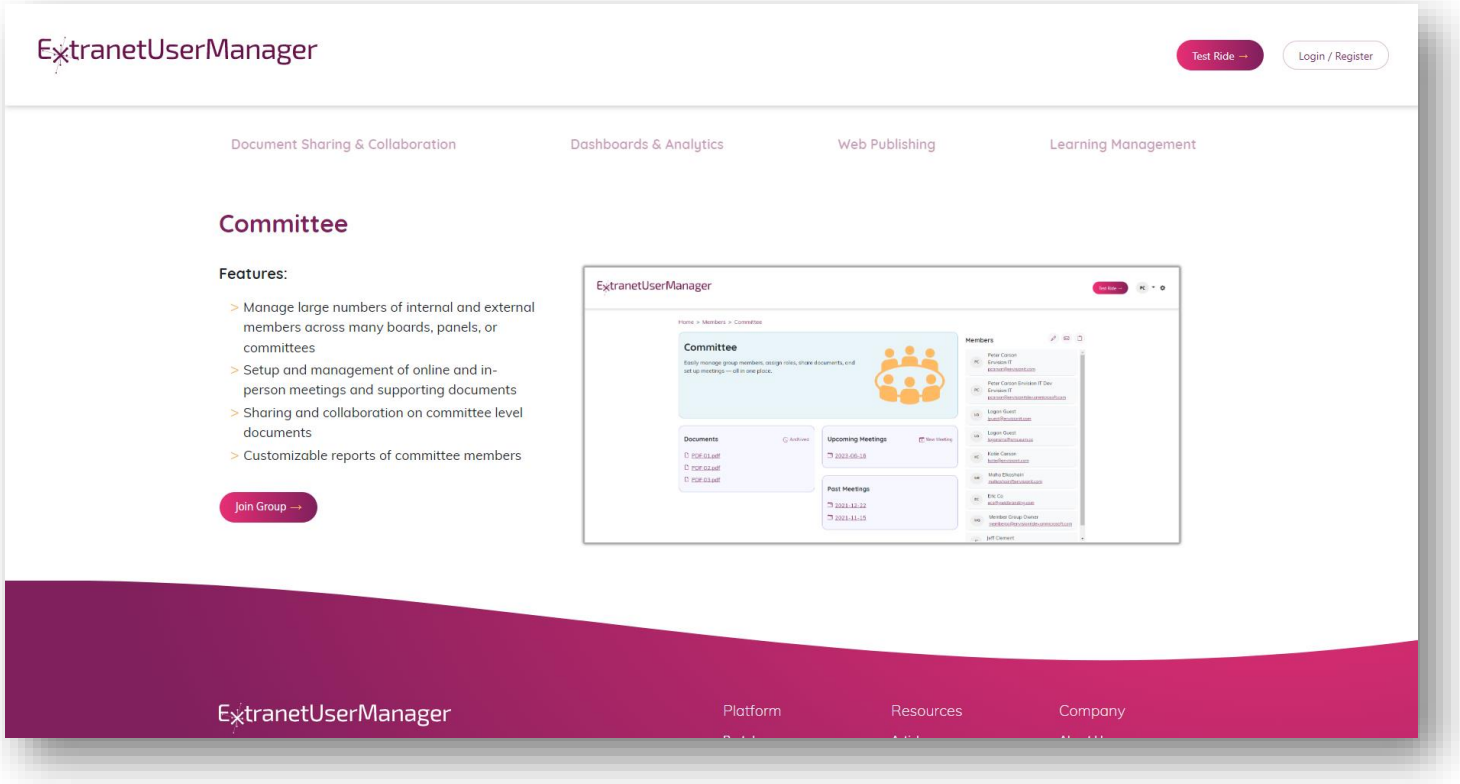
Pricing in United States Dollars (USD). Additional 1,000 packs of users are $1,800 annually

Wrap-Up Points

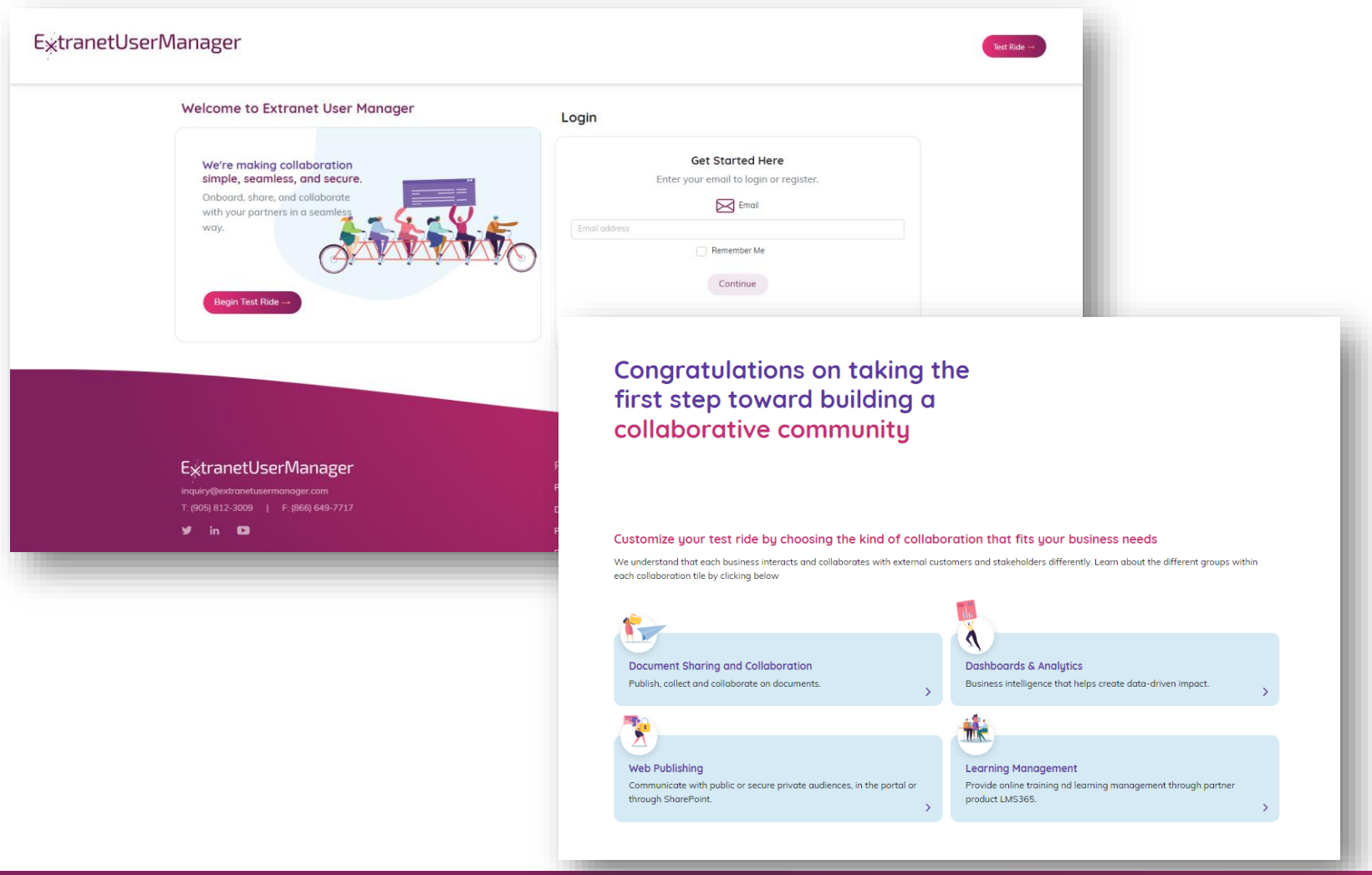


Take a Test Ride into our EUM Committee Group

- Check out our Committees template in EUM Test Ride
- Login using your preferred credentials
- Contact us for an in-depth demo of all supported login and registration scenarios



EUM Test Ride



- Test out different user journeys and sign-in flows
- Learn how EUM leverages Microsoft 365 to streamline and simplify the way you onboard, share, and collaborate externally

Check out Part Two of our MBNCanada Webinar Series

Learn more about our upcoming events at:
www.extranetusermanager.com/resources/events

Next Steps

Webinar recording and presentation slides will be available on the event page tomorrow

Follow-up email will include a link to a Microsoft Forms Poll to get your feedback about the session

We'd love to hear more about what you are interested in:

- Would you like a technical session that goes deeper into how the solutions are built?
- What other sessions would you like us to host?

Try out EUM Test Ride at www.portal.eumdemo.com/testride

Schedule time with us to discuss your scenario: [EUM Discovery Call (office365.com)]

Thank you

Questions?