



# Managing Complex Projects in Microsoft 365

Tuesday, June 8, 2021

12 - 1 PM Eastern Time



# Agenda

- Introductions
- Client Overview and Challenge
- Migrating from on-premises into M365
- Day in the life – Construction PM
- Templating and Provisioning Project Sites
- External Sharing
- Summary, Q&A and Closing

# Peter Carson



- President, Extranet User Manager
- Office Apps and Services Microsoft MVP
- [peter.carson@extranetusermanager.com](mailto:peter.carson@extranetusermanager.com)
- [blog.petercarson.ca](http://blog.petercarson.ca)
- [www.extranetusermanager.com](http://www.extranetusermanager.com)
- Twitter @carsonpeter
- President Toronto SharePoint User Group



2008

Envision IT built custom Extranet solution

2010



2012

Extranet User Manager (EUM) Installer created



Office 365 support

2014

2015

EUM Brand and Website launched



International Association of Microsoft Channel Partners  
Apps Development Partner Award 2015  
WINNER - CANADA Region

2016



Azure B2B support

2017

Partner Program launched

2019

User-Centric EUM Login Teams, SPFx, and Flow

2009

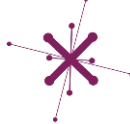


2011

Productization of code base begins

2018

EUM V4 Launched



2021

EUM Products Website Relaunched

# Customers around the Globe



100+ Customers Deployed Globally

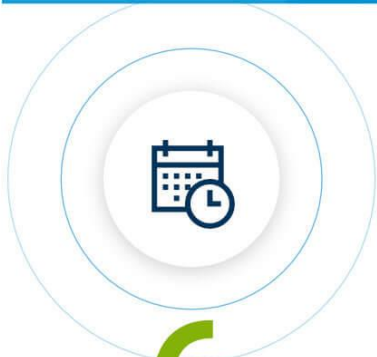
# Michael Hepples

- Director of Operations, Blueshift
- [Michael@blueshiftco.com](mailto:Michael@blueshiftco.com)
- [Blueshiftco.com/blog](https://blueshiftco.com/blog)
- [Blueshiftco.com](https://blueshiftco.com)





Business Solutions  
Powered by Microsoft 365



**6**

Years  
in Business



**14**

Team  
Members



**442**

Successful  
Projects



**3**

Partner  
Certifications



**100+**  
Clients Served

Microsoft  
Partner  


Gold Project and Portfolio Management  
Silver Application Development  
Gold Collaboration and Content

TUNDRA OIL & GAS

DUCKS UNLIMITED

Sobeys

ARCTIC GLACIER  
PREMIUM ICE

THE NORTH WEST  
COMPANY

ALBERTA INNOVATES

Kruger

POLLARD  
banknote limited

FARM CREDIT  
BANK OF TEXAS

WCB  
Workers Compensation  
Board of Manitoba

AG Advisor Group  
IN YOUR CORNER

BIRD

RLDatix™

NEW FLYER

Red River  
Mutual

Infrastructure  
Ontario

COMPUGEN

PRINCESS AUTO

SAFE  
WORK  
MANITOBA

Investors  
Group

AGI  
AG GROWTH INTERNATIONAL



# Microsoft Forms Poll



3. Which of the following do use today or are planning on using?

	Not sure what this is	Interested	Investigating	Actively using
Microsoft Teams	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SharePoint Online	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Planner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Microsoft Project	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
OneNote	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

<https://bit.ly/3po9M0b>

# Client Overview – National Construction Company

---

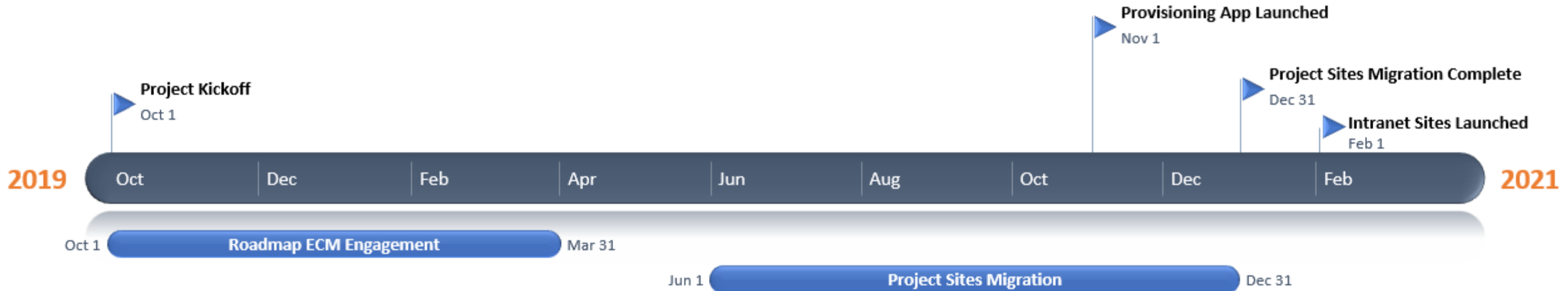
- **Canadian based**
- **Runs multi-year construction projects across Canada**
- **1000+ employees**
- **Originally ran project sites on SharePoint 2013**
  - 2000+ sites
- **Shared with 5000+ external users in custom built FBA solution**



# Client Challenge – National Construction Company

- **SharePoint 2013 reaching end of life support – clock is ticking!**
  - No value in moving to another on-premises SharePoint for support for a few years
- **Investment in Microsoft 365**
  - Client had already implemented
  - Exchange Online for email
- **Multiple project templates**
  - Using SharePoint since 2007
  - Not templated, open IT ticket, very manual process
- **Onerous external user management**
  - Manual provisioning through IT
  - Credential management
  - No self-service features

# Project Lifecycle



# Roadmap ECM Engagement

- **Blueshift engaged to investigate moving projects to M365**
  - Helped the client team write business case for the larger migration project
  - Clearly identify the benefits and "gotchas" of the migration
- **Prototype was performed with a small group of users**
  - Established template for migrated sites
  - Provided Proof of Concept for ECM and external access scenarios
- **Launching the prototype to the business led to changes in the concept**
- **Constantly evolved through the project**
  - Blueshift employed a highly iterative approach to the design, configuration, and launch of the sites to ensure that they always met the needs of the business while adhering to the guiding principles established by the client.

# SharePoint On-Premises to Microsoft 365 Migration

- **Magnitude of the migration**
  - 2078 sites
  - ~20 terabytes of content
- **Classification/Inventory exercise to go through all sites**
  - Sites haven't been modified in x number of years
  - Two migration paths
    - Active
    - Archive
- **Full re-design of project site template**
- **Flattened the Information Architecture to make the most of Microsoft 365**
  - Goodbye sub-sites and nested folders!
- **Actual migration was 8 months**
  - ShareGate migration tool

# External User Migration

- **5000+ external FBA users had to be migrated to Microsoft 365**
- **No longer required to manage credentials on behalf of the users in Microsoft 365**
- **Communicating the migration to the users was extremely important!**
- **Needed the ability to quickly onboard large numbers of non-technical users**
- **Out-of-the-box Microsoft 365 did not provide the required delegation**
- **Used Extranet User Manager (EUM) through the migration process**
  - Bulk import with Groups and permissions automatically assigned
  - Needed to have the external users available for mapping of permissions during migration
  - Imported as Guest Users in AAD
  - Disabled the Welcome email to ensure premature emails weren't issued
  - Created a Sharegate mapping file to ensure full fidelity between on-prem values and AAD

# Day in the life – Construction PM

- **Fill in a simple form with critical project details**
  - SharePoint Project Site created automatically
  - Appropriate structure and functionality included
- **Manage the subcontractor's access**
  - Adding / removing users with EUM webpart
  - Send a private registration link
- **Files are stored logically**
  - Semantically labelled directories
  - Permissions at the folder level
- **External parties can collaborate securely**
  - Only see what they have permissions to
- **Single source of truth**
- **OneDrive Sync provides Windows Explorer and easy offline access**



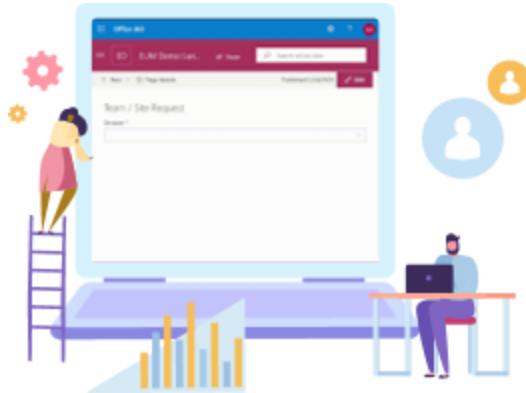
# Business Case for Templating Project Sites

- **Project Managers could be responsible for 20+ projects at any given time – consistency is key!**
- **Optimal navigation for both internal and external users**
- **Single template provides a baseline consistency**
  - Template can be adjusted to address additional project needs
- **Site template can be much more than a pretty interface. Can have pre-defined:**
  - Document libraries
  - Metadata
  - Content types
  - SPFx webparts
  - Planner boards
  - OneNote
- **All 2000+ migrated sites were merged into the go forward modern site template**

# Options for Templating, and Provisioning Teams/Sites



Roll Your Own -  
PowerApps  
[Business Apps |  
Microsoft Power Apps](#)




EUM Open Source  
Solution  
<http://eum.co/teams>



Orchestra  
[www.orchestry.com](http://www.orchestry.com)

[ShareGate Apricot](#) | [AvePoint](#) | [Valo Teamwork](#) | [ProvisionPoint 365](#)

# Site Request PowerApp

**SITE REQUEST FORM** show record 16 Go to FAST demo form 

[Submit Request](#) [Discard Request](#)

**NEW SITE REQUEST** Draft \* Required Field

**SITE DETAILS**

Site Request Status:  ▼    \*Site Name:     \*Site Number:

MS Teams Required:  No

**ACCESS INFORMATION**


\*Site Administrator:  ▼    \*Site Access Email Address:  ▼

External Access Required:  No

**IT INFORMATION**

Completed By:     Date Completed:  📅

**Approval Workflow**

-  Initial Request  
MOD Administrator
- IT Approval
- Request Completed

[Submit New Request](#)

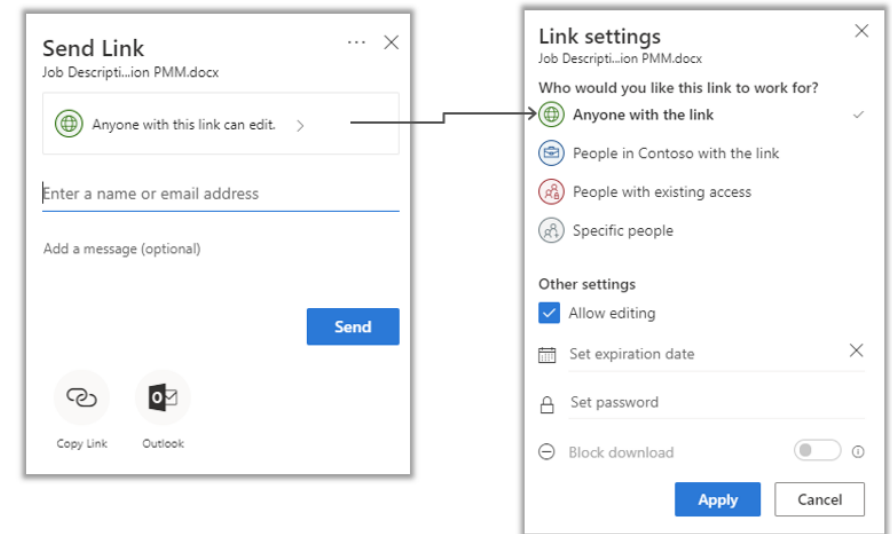
[Discard](#)

## Architecture

- **SharePoint List**
- **Custom Power App UI**
- **Power Automate Flow**
  - Triggers on new Request
  - Approval process
  - Triggers an Azure Runbook
- **Runbook executes PnP Powershell**
  - Copies base template SharePoint Site collection

# External Sharing in Microsoft 365

- **FBA is not supported in Microsoft 365**
  - Users must exist as Guest Users in the inviting tenant
- **External sharing of project sites in Microsoft 365 is an option**
  - Individually inviting 5000+ external users is not manageable
  - Challenging to define a permission structure from site to site
- **Azure AD B2B supports the management of larger user sets**
  - Also removes the need to manage credentials on behalf of external users
  - No additional Microsoft licensing requirements
  - If using premium AAD features then first 50K MAUs are free
  - Does not support the delegation of user management to the PMs



# Azure AD B2B Onboarding 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

## No Azure AD Account

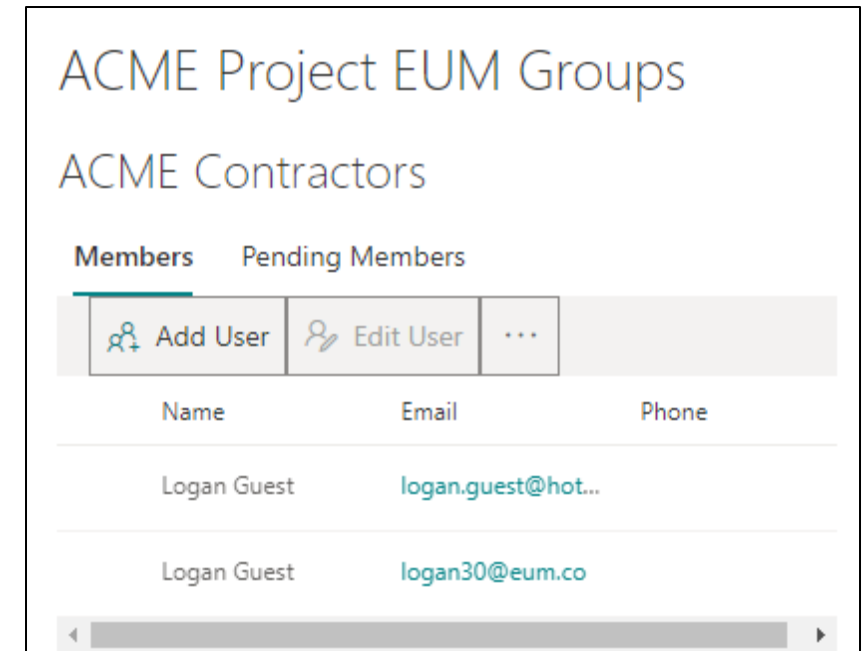
- One time passcode
- Emailed at sign-in
- Valid for 10 minutes
- Low friction, no new account to setup or password to remember
- Validates at each sign in that they still own the email address

## Google/Facebook User

- Federation with Google/Facebook accounts now also supported
- Same seamless login experience as Microsoft 365

# External Sharing Project Sites with EUM

- **Project Managers manage project site contents and contractor access**
- **Delegated administration**
- **Project site request contains a field to define whether a site requires external access**
  - Standard set of EUM groups are created per project
  - Group has contribute access to a folder within the templated document library
- **EUM Group Members SPFx webpart enables Project Managers to add/edit/remove group members from the project site**
  - Direct invite through webpart
  - Private registration link invite



# Two Invitation Options for Onboarding Contractors

## Invitation Only

- **Project Manager knows who to invite**
- **Direct one of invitations**
- **Bulk import of external users**

## Private Registration

- **Project Manager knows someone who knows who to invite**
- **Private registration link that is not easily guessed**
- **Can be forwarded any number of times**
- **Project Manager is the approver for the group**

# Invitation Only

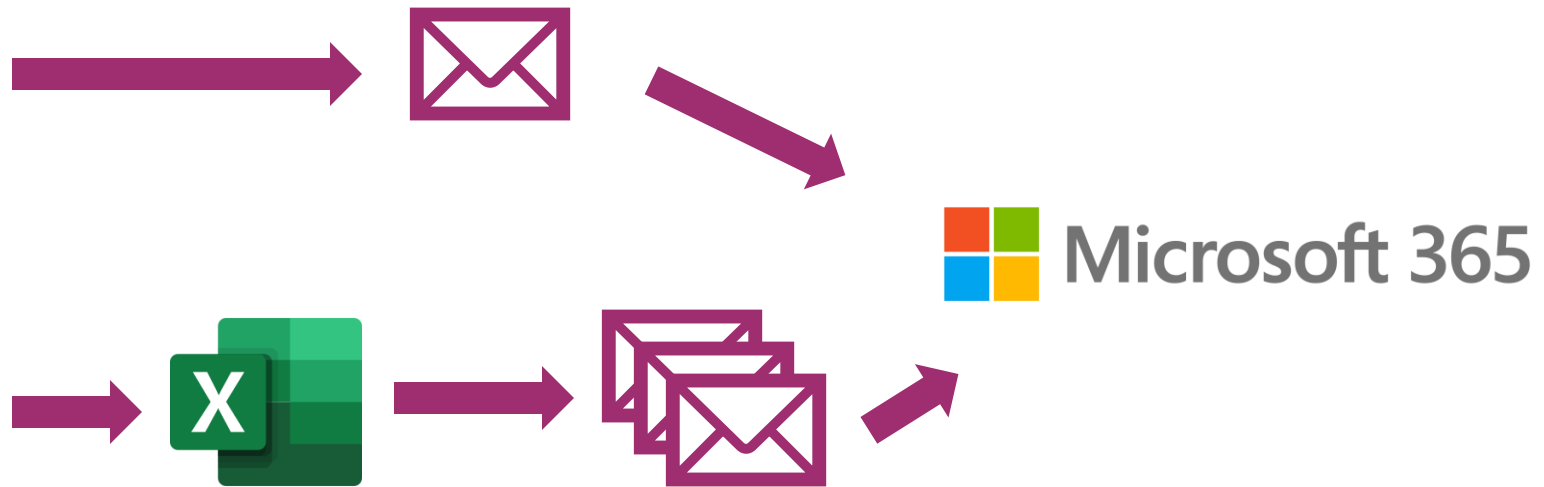
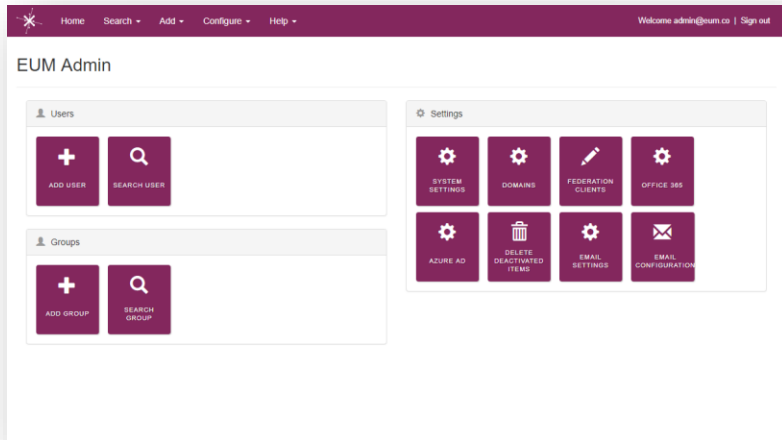
EUM Groups

+ New EUM Group

Group 1

+ Add User   Edit User   Remove User(s)   Email User(s)   ...

Name ↑	Email	Phone
Dummy Member 1	dummy1@eum.co	(111) 111-1111
Dummy Member 2	dummy2@eum.co	(222) 222-2222
Dummy Member 3	dummy3@eum.co	(333) 333-3333
Dummy Member 4	dummy4@eum.co	(444) 444-4444
Dummy Member 5	dummy5@eum.co	(555) 555-5555
Dummy Member 6	dummy6@eum.co	(666) 666-6666
Dummy Member 7	dummy7@eum.co	(777) 777-7777





# Private Registration



ExtranetUserManager

Private Group with Approval

This group is private and is not shown on the list page of all public groups. To join the group you need the invitation URL. Joining a group submits a request for approval before you are added to the group.

Join Group Back



ExtranetUserManager

Get Started here

Choose a method to login or register.

Email

or

Office 365



ExtranetUserManager

Get Started here

Choose a method to login or register.

Email address

Continue



ExtranetUserManager

Welcome

Register your account. All fields are required.

First name Last name

Country Organization

Register



No longer required to login to VPN to manage project



Can manage project from anywhere, anytime with any device



Single version of the truth – no more emailing attachments!



Project Manager is able to manage their own external users with no reliance on IT

# Quick Wins for Project Managers

# Wrap up Points

- Still on premises? Clock is ticking
- Consider a road map / prototype exercise
- Migration time is time for some house cleaning!
- 'Teams First' approach to building modern IA
- Sites, Templates, Permissions – Consistency is key!
- Ad-hoc vs. structured external sharing

# Interested in learning more?



**Peter Carson**

[peter.carson@extranetusermanager.com](mailto:peter.carson@extranetusermanager.com)



**Michael Hepples**

[michael@blueshiftco.com](mailto:michael@blueshiftco.com)



**Logan Guest**

[logan.guest@extranetusermanager.com](mailto:logan.guest@extranetusermanager.com)

# Upcoming Webinars



## Microsoft 365 Unstructured and Structured External Sharing

July 13, 2021  
12 pm – 1 pm EST



## New Azure AD External Identities Features

July 27, 2021  
12 pm – 1 pm EST

Register for all upcoming events at <http://eum.co/resources/events>

# Thank you!

## Questions?

