

 European  
SharePoint  
Office 365 & Azure  
Conference



**ESPC22**  
COPENHAGEN



# Teams and Microsoft 365 External Users - Unstructured and Structured

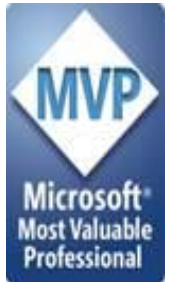
**PETER CARSON**

PRESIDENT, ENVISION IT/EXTRANET USER MANAGER, CANADA

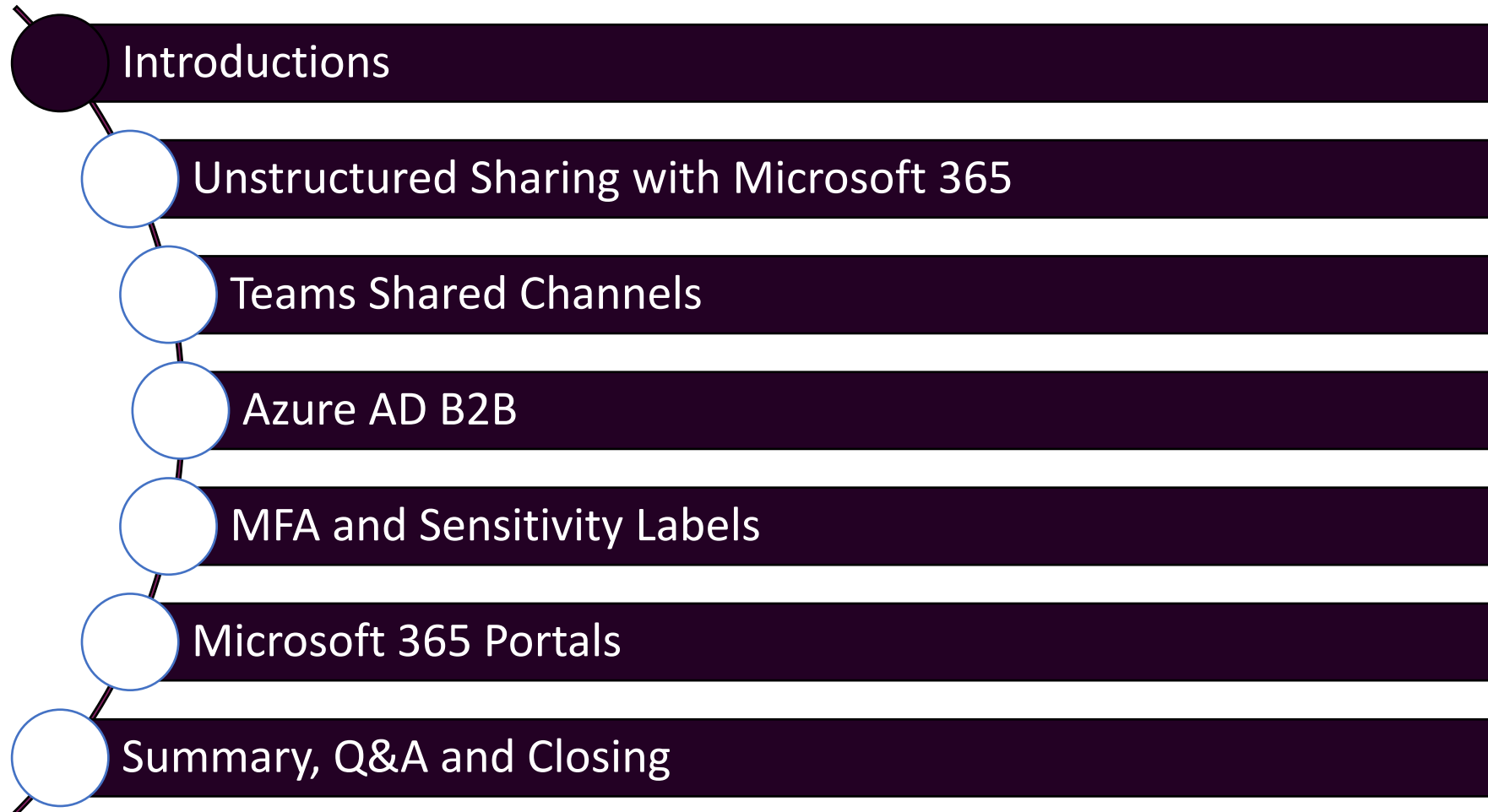
## Peter Carson



- President, Envision IT and Extranet User Manager
- Office Apps and Services Microsoft MVP
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- [blog.petercarson.ca](http://blog.petercarson.ca)
- Twitter @carsonpeter
- President Toronto SharePoint User Group
- [www.eum.co/espcc](http://www.eum.co/espcc)



# Agenda



# Microsoft Forms Poll

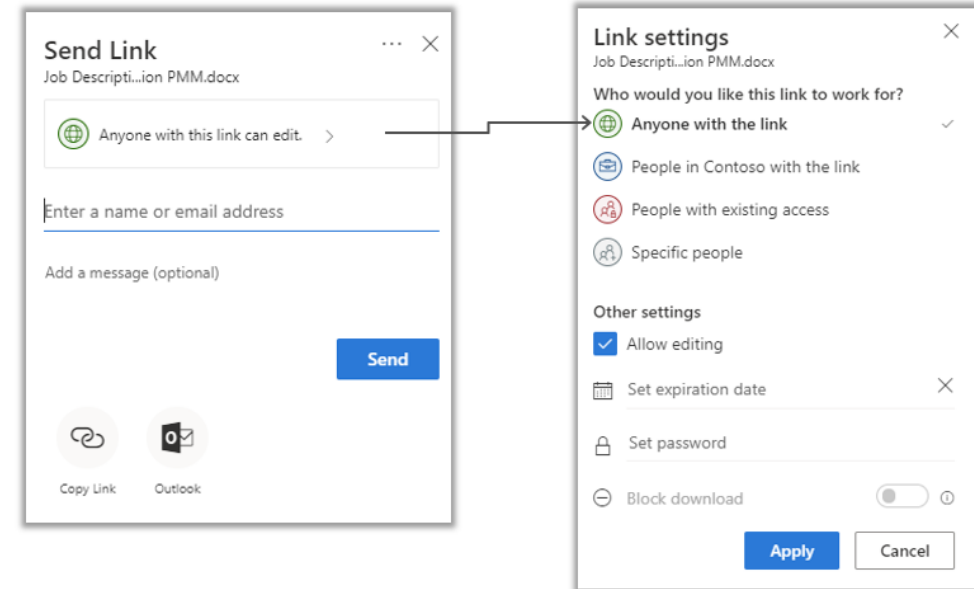


3. Which of the following do you use today or planning on using?

	Not sure what this is	Interested	Investigating	Actively using
SharePoint Link Sharing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
OneDrive Request Files	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teams External Sharing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teams Connect	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Yammer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Azure AD B2B	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Azure AD Security	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Azure AD B2C	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Azure Entitlement Management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Extranet User Manager	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

# Unstructured Sharing with Microsoft 365

- External Sharing in Microsoft 365 strongly supports ad-hoc collaboration
- Sharing documents with a few to a few dozen external people
- Secure Link sharing to sites, libraries, and documents
  - Anyone with the link (Anonymous)
  - People in your Organization
  - People with existing access
  - Specific people



# Microsoft 365 External Sharing OOTB

- |  |   |   |
|--|---|---|
| 1. Who will you be sharing with? Is there a member database to interface with?     | → | Any type of external user   |
| 2. Self-registration option or invitation only?<br>Who approves new registrations? | → | Invitation only   |
| 3. How will your external users authenticate?                                      | → | Microsoft 365 / Azure AD, Microsoft Account, One Time Passcode, Gmail, Facebook |
| 4. What interactions are your external users going to have?                        | → | Any interactions  |
| 5. What applications will be accessible?   | → | Microsoft 365 only  |

# Managing External Sharing

## Control WHO can share to external users

- Everyone
- Only specific people
- No one

## Control WHICH external users can be shared with

- Anyone
- Only authenticated users
- Only authenticated users except specific domains
- Only authenticated users in specific domains
- No one

## Control WHAT can be shared externally

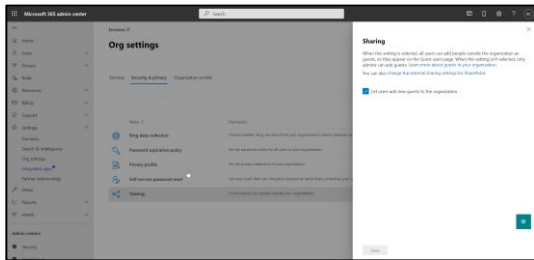
- Anything
- Only specific sites
- Only files without sensitive content

## Control HOW externally shareable links can be used

- Default
- Enabled, but not default
- Mandatory expiration date
- Block externally-shareable edit links
- Disabled



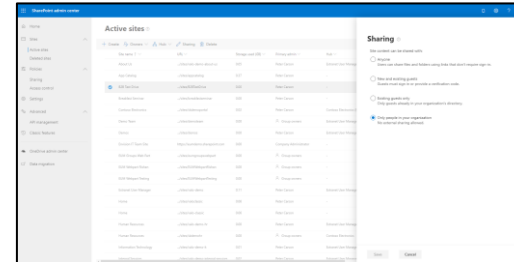
# Multiple Places to Configure External Sharing



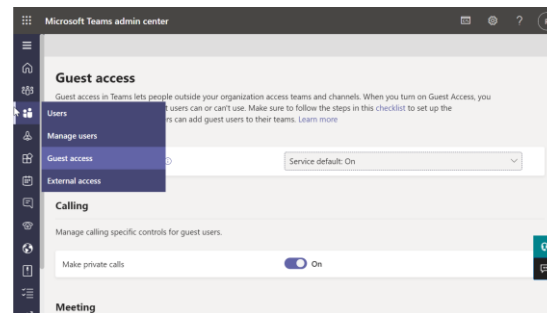
Microsoft 365 Admin



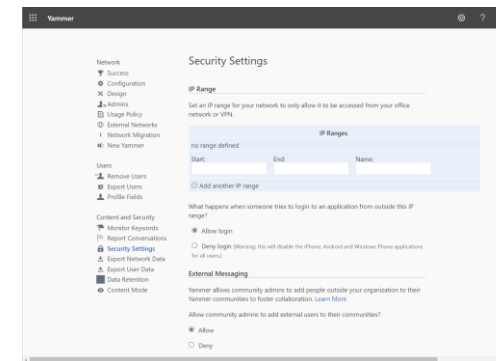
SharePoint Admin



Site Collection Admin



Teams Admin



Yammer Admin



PowerShell

# Shareable Links

**Send Link**  
Sales Materia...s (22 items)

Anyone with the link can view.

Enter a name or email address

Add a message (optional)

**Send**

Copy Link Outlook

**Link Settings**  
Sales Materia...s (22 items)

Who would you like this link to work for? [Learn more](#)

- Anyone ✓
- People in Contoso
- People with existing access
- Specific people

Other settings

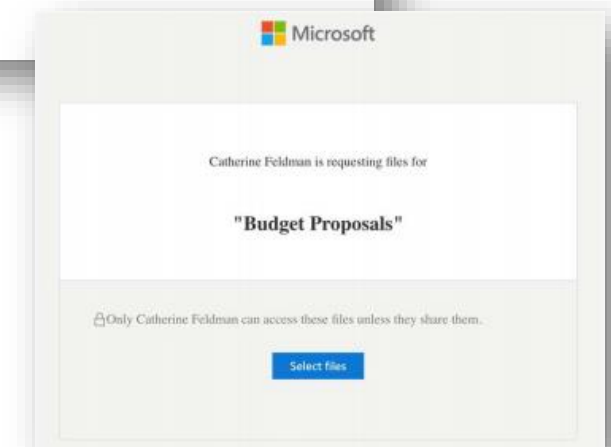
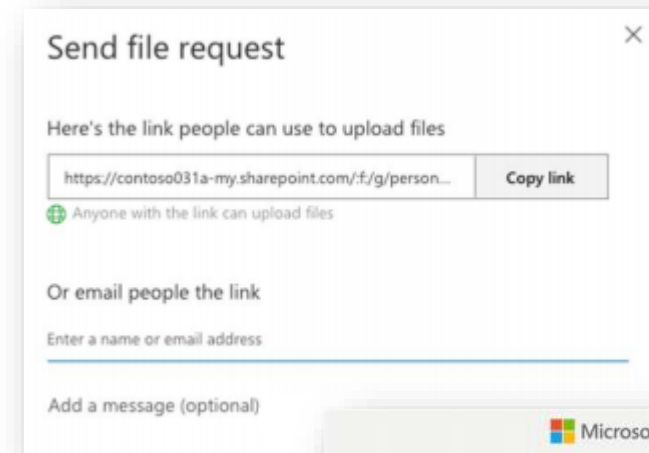
- Allow editing
- Set expiration date

**Apply** Cancel

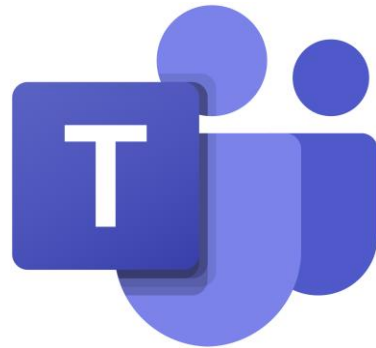


# Request Files

- Ask colleagues and external guest users to upload files to a folder
- Uploaders can only see their own content
- Single link can be used for many uploaders



# External Users in Teams



# External Users in Teams

## B2B Guests

- User exists in the external Team's Azure AD
- All the B2B controls apply
- Guests need to switch their Teams to the external tenant
  - Lose their home tenant's Teams, notifications, feeds
- Can use different browser profiles for different tenants

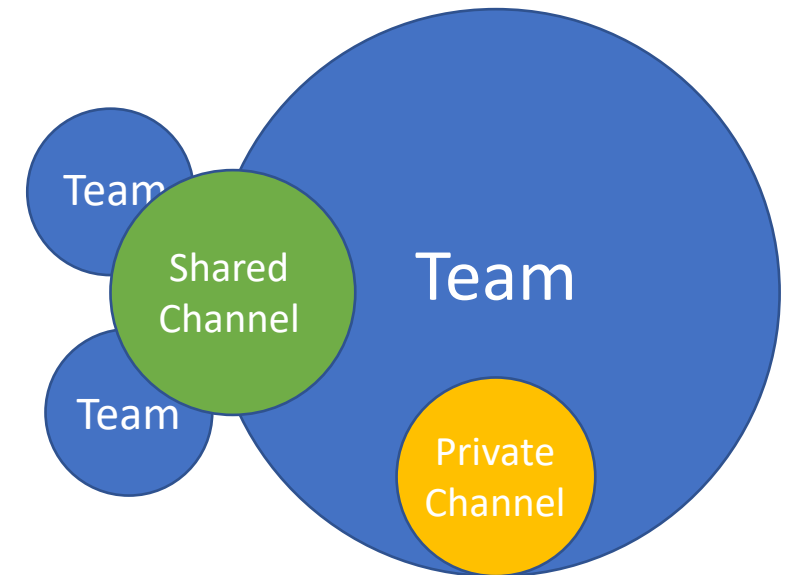
## Teams Connect

- Needs to be enabled on both tenants
  - More for organization to organization sharing
- No tenant switching
- Shared channels appear with all the home Teams and channels
- Also appear in home activity feed

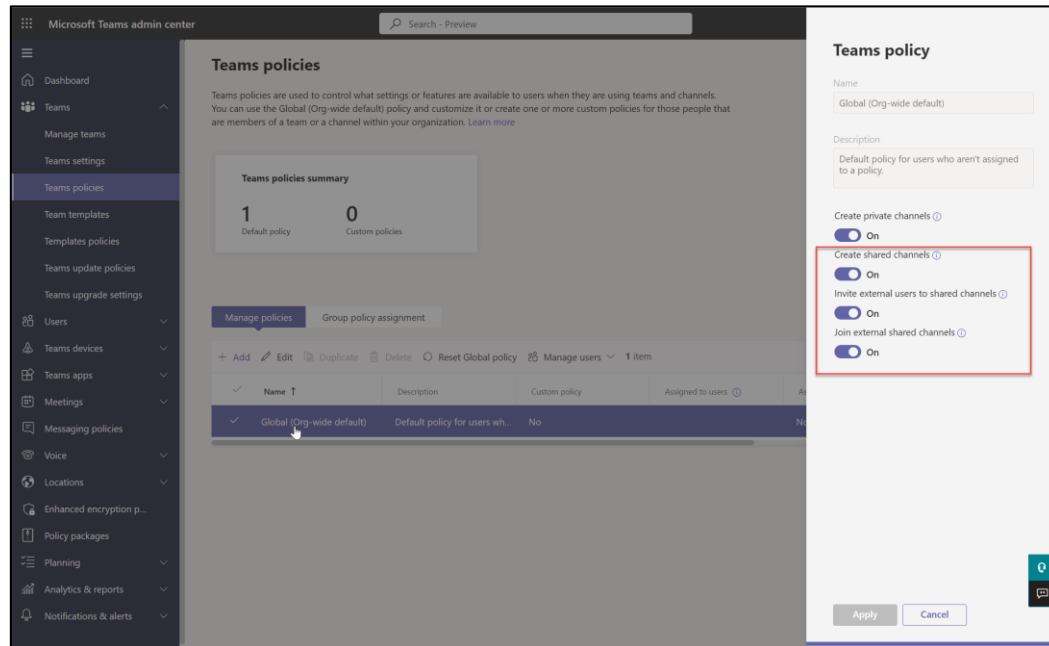
[How We Use Teams Shared Channels | Extranet User Manager](#)

# Shared Channels vs. Private Channels

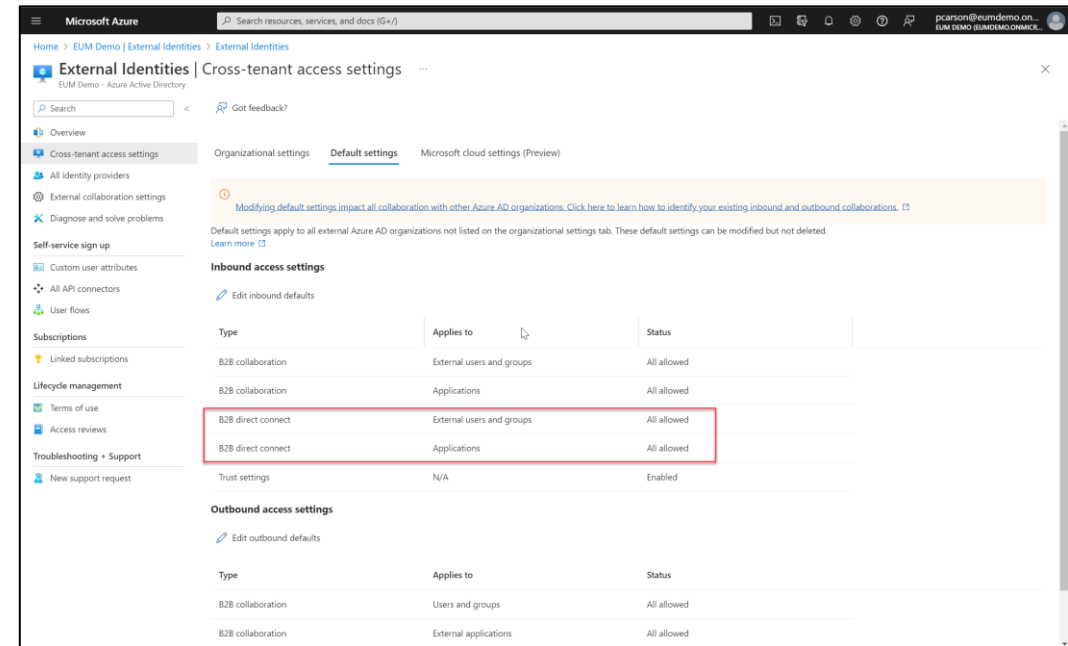
- Both channel styles create a channel site collection for documents
- Both have Teams restrictions on Apps and features
- Private channels let you invite a subset of the parent Team's members
- Shared channels let you invite anyone allowed in the tenant
  - Can also include other Teams
- Department team that is private to that department
  - All company channel for two way communication with the organization
- Outbound connections don't need to be setup
  - Just add members of the tenant



# Configuring Shared Channels



Teams Admin



Azure Portal

Search

EUM Demo PC

**Teams**

Your teams

- Marketing @Envision IT
- EUM Demo - Market... (Ex...**
- EUM - Microsoft Team
  - General
  - EUM Admin
  - Project Updates
- Private Group with Appr...
- Teams Provisioning
  - General
  - Project One


Join or create a team

**EUM Dem...** Posts Files

+ New Upload

All Documents

**Documents**

Name	Modified	Modified By
		



# External Users in Yammer

- Yammer was acquired in 2012
- It's been a long road to rearchitect it on the Microsoft stack
- Classic Yammer had its own authentication
  - Yammer username and password
  - Federation
- Azure AD is now the preferred
- B2B support has just been added
  - Still seeing some challenges
  - Yammer embed with external users doesn't work



# Discover the Microsoft Entra product family



## Azure Active Directory

Safeguard your organization with the identity and access management solution that connects people to their apps, devices, and data.



## Microsoft Entra Permissions Management

Discover, remediate, and monitor permission risks across your multicloud infrastructure with a cloud infrastructure entitlement management (CIEM) solution.



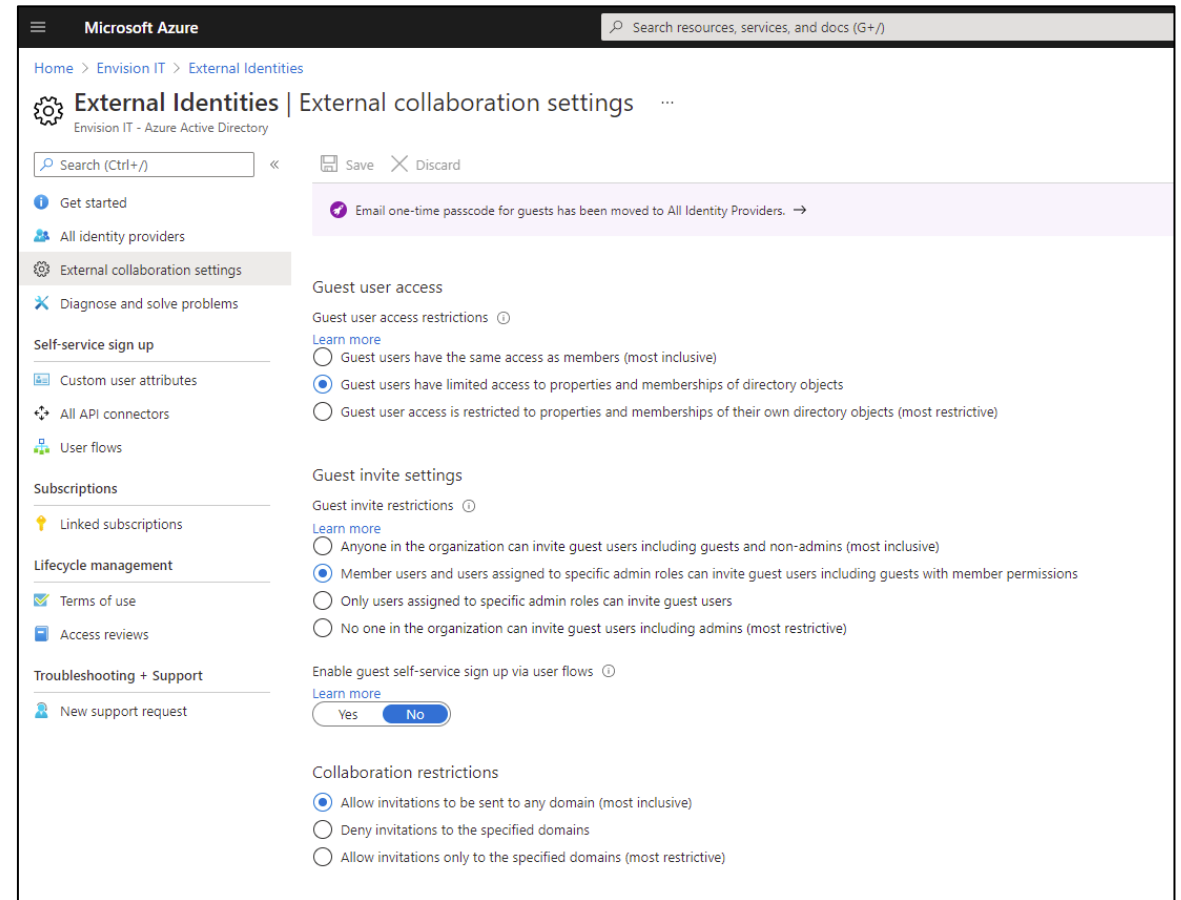
## Microsoft Entra Verified ID

Create, issue, and verify privacy-respecting decentralized identity credentials with an identity verification solution that helps you enable more secure interactions with anyone or anything.

[Microsoft Entra - Secure Identities and Access | Microsoft Security](#)

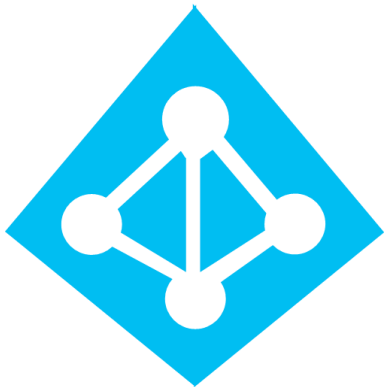
# Azure AD External Identities (B2B)

- Allow outside users access to apps and resources
- “Bring their own identities” to sign in
- External user’s identity provider manages their identity
- You manage access to apps within Azure AD protecting your resources



[External Identities documentation](#) | [Microsoft Docs](#)

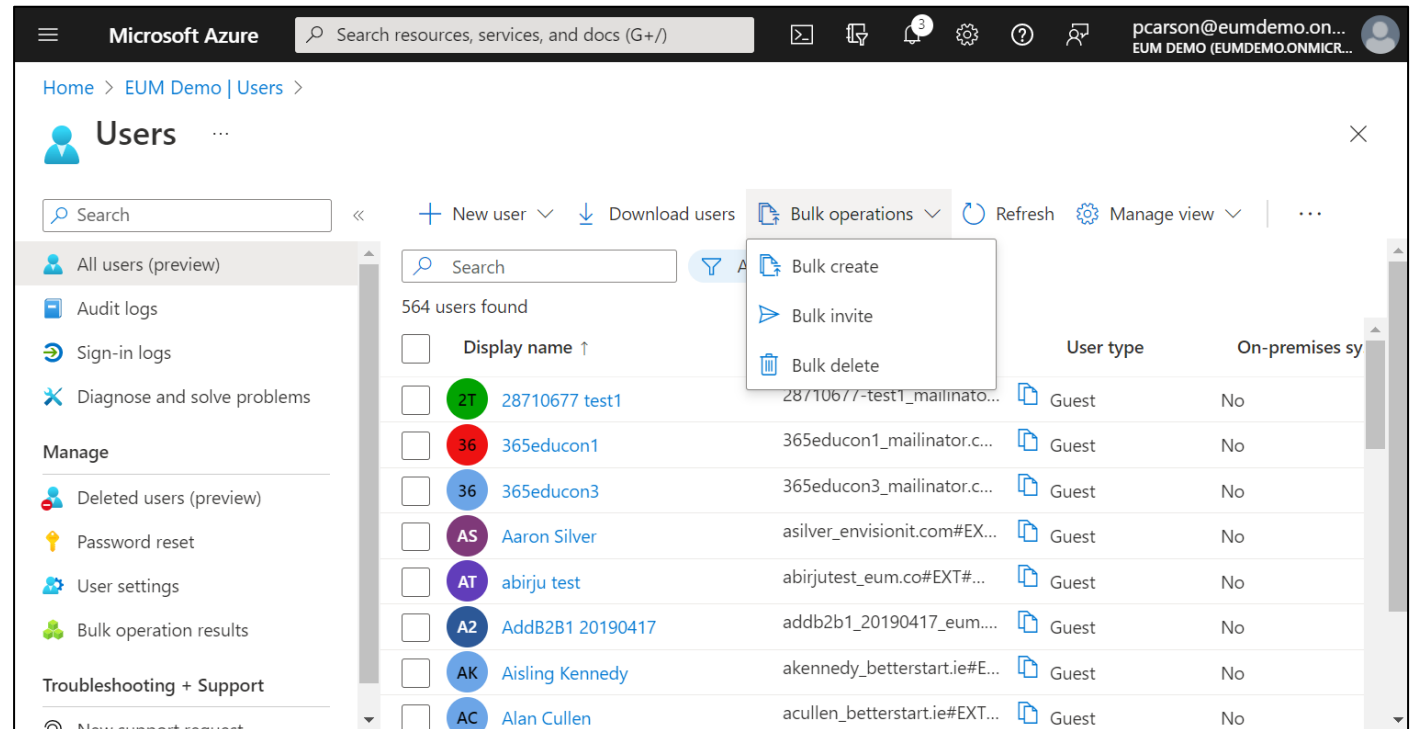
# Azure AD B2B and Microsoft 365



- Azure Active Directory Business to Business
- External users can access Microsoft 365 and any other system exposed through AAD
- Completely free for certain Microsoft 365 workloads for external users
  - SharePoint
  - Yammer
  - Teams
  - Planner
  - Office Online
- MAU billing model only applies to Azure AD Premium features
- First 50,000 MAU are free for Premium features
- Invite as many external users as you'd like

# Azure AD Invitation Process

- Invitations are done through the Azure AD or Entra portals
- Not a business friendly interface
- Can be one at a time, or bulk import by CSV
- Need to have Global Admin, User Administrator, or Guest Inviter role
- Guest Inviters can only set the email and display name
  - Cannot edit or delete after creation
  - Could build a Power App, Power Automate, or Logic App to help with this



# Extranet User Manager

The screenshot displays the 'Search Users' page in the Extranet User Manager. The left sidebar contains navigation options: Home, Reports, Users, Search Users (highlighted), Add New User, Groups, Search Groups, Add New Group, Admin, License, Azure AD, Quick Links, EUM Configuration Site, and EUM Portal. The main content area is divided into two sections: 'Search Users' and 'Search Results'. The 'Search Users' section has input fields for 'First Name' (with 'pete' entered), 'Last name', and 'Email', along with 'Search' and 'Reset' buttons. The 'Search Results' section shows a table of users with checkboxes, display names, and email addresses.

<input type="checkbox"/>	Display Name	Email
<input type="checkbox"/>	<a href="#">Peter Carson</a>	4165614885@sms.eum.co
<input type="checkbox"/>	<a href="#">Peter Carson</a>	pcarson@envisionit.com
<input type="checkbox"/>	<a href="#">Peter Carson</a>	peter.a.carson@outlook.com
<input type="checkbox"/>	<a href="#">Peter Carson Envision IT Dev</a>	pcarson@envisionitdev.onmicrosoft.com
<input type="checkbox"/>	<a href="#">Peter Carson Gmail</a>	pcarson337@gmail.com
<input type="checkbox"/>	<a href="#">Peter Demo</a>	pdemo1@mailinator.com
<input type="checkbox"/>	<a href="#">Peter Demo 1</a>	peterdemo1@mailinator.com
<input type="checkbox"/>	<a href="#">Peter Demo 5</a>	pdemo5@mailinator.com
<input type="checkbox"/>	<a href="#">Peter Demo 6</a>	pdemo6@mailinator.com
<input type="checkbox"/>	<a href="#">Peter Test 1</a>	ptest1@mailinator.com

Support User Guide      License valid until 2022-12-31      © 2022 Extranet User Manager - v6.0.8357.3

- Simple delegation to the business or external users
- Invitation, self-registration, and bulk import
- Approval workflows and auto-approvals
- Group management and discovery
- Mobile friendly

# 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 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 now also supported
- Same seamless login experience as Microsoft 365
- Need to be an @gmail.com address for Google Federation

# Email One-Time Passcode Authentication

- New way to authenticate Guest users without:
  - Azure AD account
  - Microsoft account
  - Social provider - Google or Facebook
- Temporary passcode is sent to email address
- Passcode is entered to sign in
- One-time passcode is valid for 30 minutes
- Next user session will send a new passcode to the user



# EUM Test Ride

The screenshot shows the ExtranetUserManager website interface. At the top left, the text "ExtranetUserManager" is displayed. At the top right, there is a "Login / Register" button. The main content area features a large illustration of six diverse people riding a red tandem bicycle. One person is holding up a purple rectangular screen displaying code. To the left of the illustration, the text reads: "Congratulations on taking the first step toward building a collaborative community". Below this, a sub-header says: "Customize your test drive by choosing the kind of collaboration that fits your business needs". A paragraph follows: "We understand that each business interacts and collaborates with external customers and stakeholders differently. Learn about the different groups within each collaboration tile by clicking below". There are five light blue tiles, each with an icon and a title: 1. "Document Sharing and Collaboration" with an icon of a person and a document, description: "Publish, collect and collaborate on documents.", right arrow. 2. "Dashboards & Analytics" with an icon of a person and a bar chart, description: "Business intelligence that helps create data-driven impact.", right arrow. 3. "Messaging" with an icon of a person and a speech bubble, description: "Group conversations through external Teams and Yammer groups.", right arrow. 4. "Web Publishing" with an icon of a person and a document, description: "Communicate with public or secure private audiences, in the portal or through SharePoint.", right arrow. 5. "Learning Management" with an icon of a person and a book, description: "Provide online training and learning management through partner product LMS365.", right arrow.

[portal.eumdemo.com/testride](https://portal.eumdemo.com/testride)

# Microsoft at RSA 2020

> 1.2M	Compromised accounts in January 2020
99.9%	Compromised accounts did not have MFA
99%	Password spray attacks used legacy authentication
> 97%	Replay attacks used legacy authentication

[Azure AD and Microsoft 365 Security Fundamentals | Extranet User Manager](#)

# MFA Scenarios

## Admins

- Require MFA on every authentication

## Members

- Rules can be more flexible
- Don't need MFA on every authentication
- Every x days on the same device
- Additional rules
  - Joined device
  - Geography
  - Identity Protection score
  - Incorrect password

## Guests

- Decide if MFA is required
- User experience and support cost to requiring it
- Doesn't need to be all or nothing
- Sensitivity labels are a good way to control this

# Azure Portal B2B Links

## [Cross Tenant Settings](#)

- B2B Collaboration
- B2B Direct Connect
- Trust Settings

## [Identity Providers](#)

- Microsoft
- One-Time Passcode
- Google
- Facebook
- Custom SAML / WS-Federation

## [External Collaboration Settings](#)

- Access, invite, and collaboration restrictions

## **Self-Service Sign Up**

- [User Attributes](#)
- [API Connectors](#)
- [User Flows](#)

## **Lifecycle Management**

- [Terms of Use](#)
- [Access Reviews](#)

## [Company Branding](#)

### **Security**

- [Conditional Access](#)
- [Terms of Use](#)

### **Monitoring**

- [Sign-In Logs](#)
- [Audit Logs](#)
- [Diagnostic Logs](#)

# Azure AD P1 vs. P2

## Azure AD Premium P1

- Multi-factor authentication with Conditional Access
- Hybrid Identities
- Password protection (custom banned passwords)
- Advanced Security and Usage Reports
- Conditional Access based on group, location, and device status
- Azure Information Protection integration
- And [Much More](#)

## Azure AD Premium P2

- Everything offered in P1
- Identity Protection
- Privileged Identity Management
- Access reviews
- Entitlement Management (Preview)

# Updates to Azure AD External Identity Licensing

- External identities now count as unique Monthly Active Users (MAU)
- Billing model affects Azure AD B2B and B2C
- Replaces 1:5 billing ratio
- First 50,000 MAUs are free for both Premium P1 and Premium P2 features
- Azure AD Free will remain free unless you need premium Azure AD features for guests

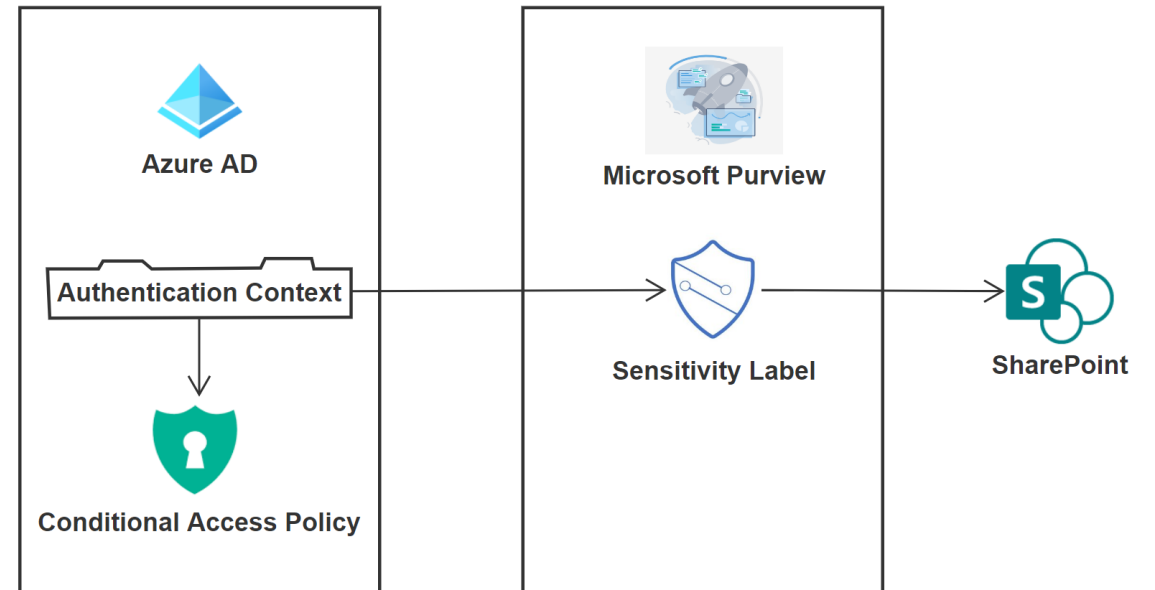
	PREMIUM P1	PREMIUM P2
First 50,000 MAU	\$0/Monthly Active Users	\$0/Monthly Active Users
More than 50,000 MAU	\$0.00416/Monthly Active Users	\$0.020736/Monthly Active Users

\*Features in public preview are subject to future pricing changes.

<https://docs.microsoft.com/en-us/azure/active-directory/external-identities/external-identities-pricing>  
<https://azure.microsoft.com/en-us/pricing/details/active-directory/external-identities/>

# Sensitivity Labels

- Labels can be applied to content in Microsoft 365
  - Emails
  - SharePoint sites and content
- Can be manually or automatically applied
- Can be leveraged in conditional access policies
- Can also enforce rights management and encryption
- Travels with the content regardless of location
- Can be applied to sharing rules
- Requires Office 365 E5 Compliance



# Sensitivity Labels Walkthrough



# Azure AD B2B Health

- User Type Not Populated
  - Users created before Aug 2014 when B2B first launched
- Mismatch Between Email and UPN
  - Can cause confusion when signing in
- Missing Email
  - Email is required for direct sign in without accepting the Microsoft invitation
- Unaccepted Invitations
  - Invitations are no longer needed
  - Users that were invited when it was required and didn't accept can't sign in
  - Resending the invitation still requires them to use the invitation
  - Deleting and re-inviting them allows them to sign in without the invitation
- Conflicting Microsoft Account
  - Brings up work/school or personal account dialog
  - Doesn't always prompt
  - Causes confusion

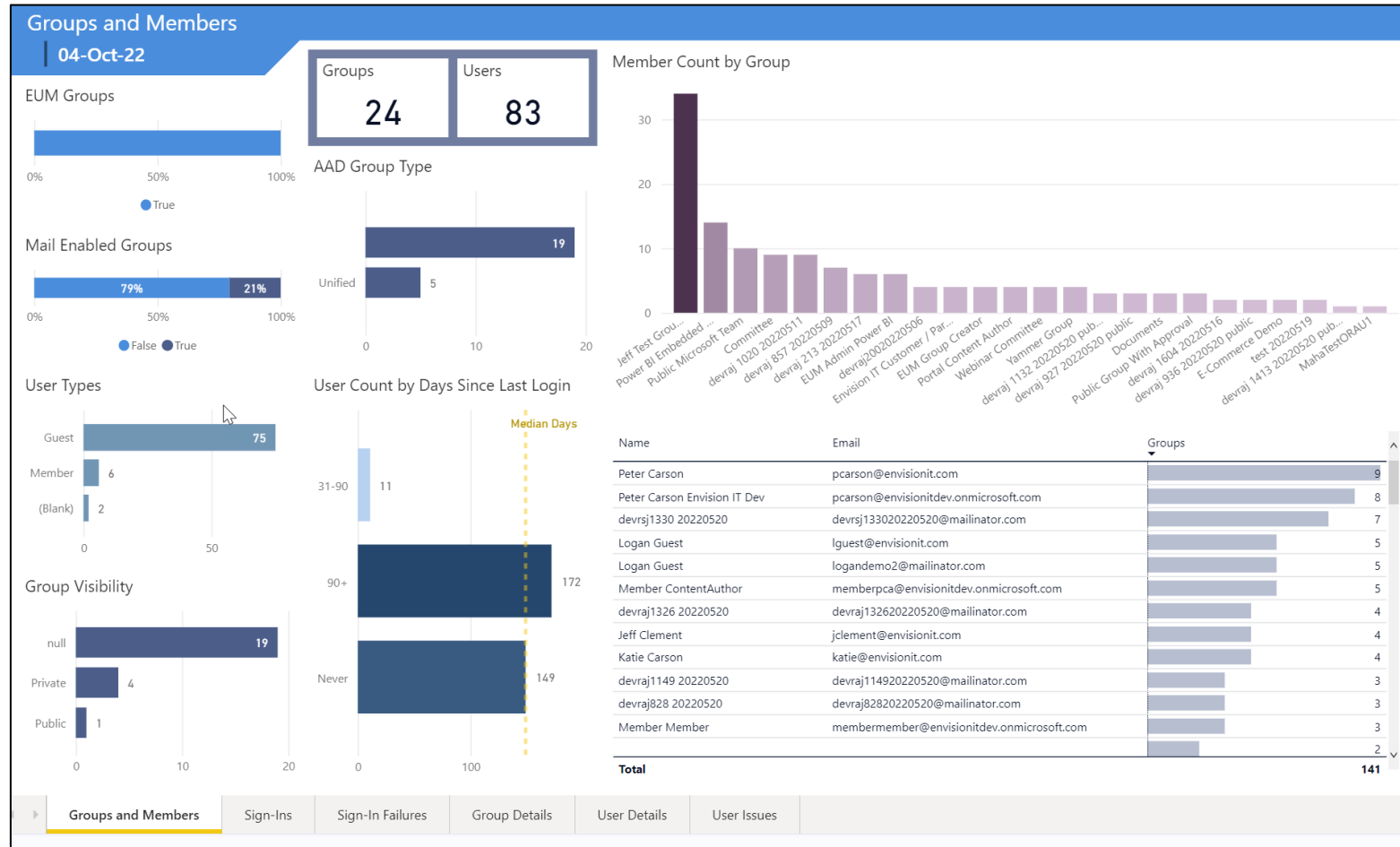
# Azure AD B2B Resources

The screenshot shows the 'ExtranetUserManager' website. The navigation bar includes 'Platform', 'Resources', 'Pricing', 'About', and 'Support'. The main content area features a breadcrumb 'Home > Resources' and a large heading 'Azure AD B2B Collaboration Resources'. Below this is a section titled 'About Azure' with a paragraph of text. A 'Featured Article' section highlights 'Power BI Azure AD Users and Groups Dashboard' with a date of 'Jun 23, 2022' and a 'Download Technical Guide' button. A 'Related Assets' section shows 'Configuring Azure AD B2B for External Users'. On the right side, there are two call-to-action buttons: 'Learn more AZURE AD B2B RESOURCES' and 'Stay in the loop NEWSLETTER SIGN UP'. A 'Support' button is located at the bottom right of the page.

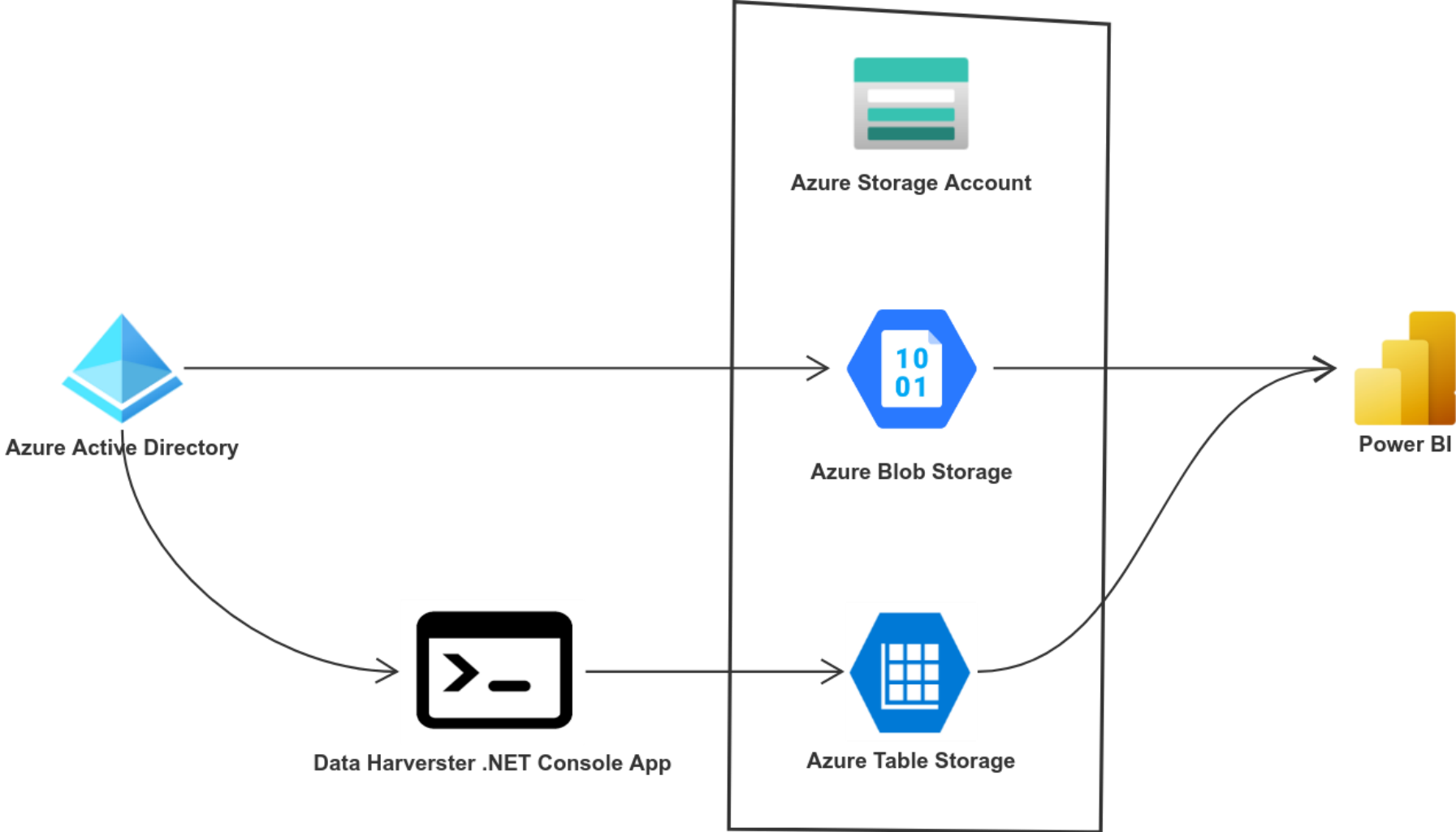
<https://www.extranetusermanager.com/resources/Azure-AD-B2B-Collaboration-Resources>

[https://github.com/extranet-user-manager/EUM\\_AzureADPowerBI](https://github.com/extranet-user-manager/EUM_AzureADPowerBI)

# Azure AD Power BI Dashboard


Groups and Members
Sign-Ins
Sign-In Failures
Group Details
User Details
User Issues

# Power BI Data Harvester



# Microsoft 365 Portals

# 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, Teams, or Yammer
  - 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



# Structured Sharing with Microsoft 365

- Typically hundreds to hundreds of thousands of external users
- Represent many different groups of external users
  - Projects
  - Committees
  - Customers
  - Vendors
  - Partners
- May be many different business owners
  - Owners can be internal or external

# Microsoft 365 Structured Sharing Options

## Roll Your Own

- Build in the tool of your choice
- Integrate through the Graph API

## Azure AD

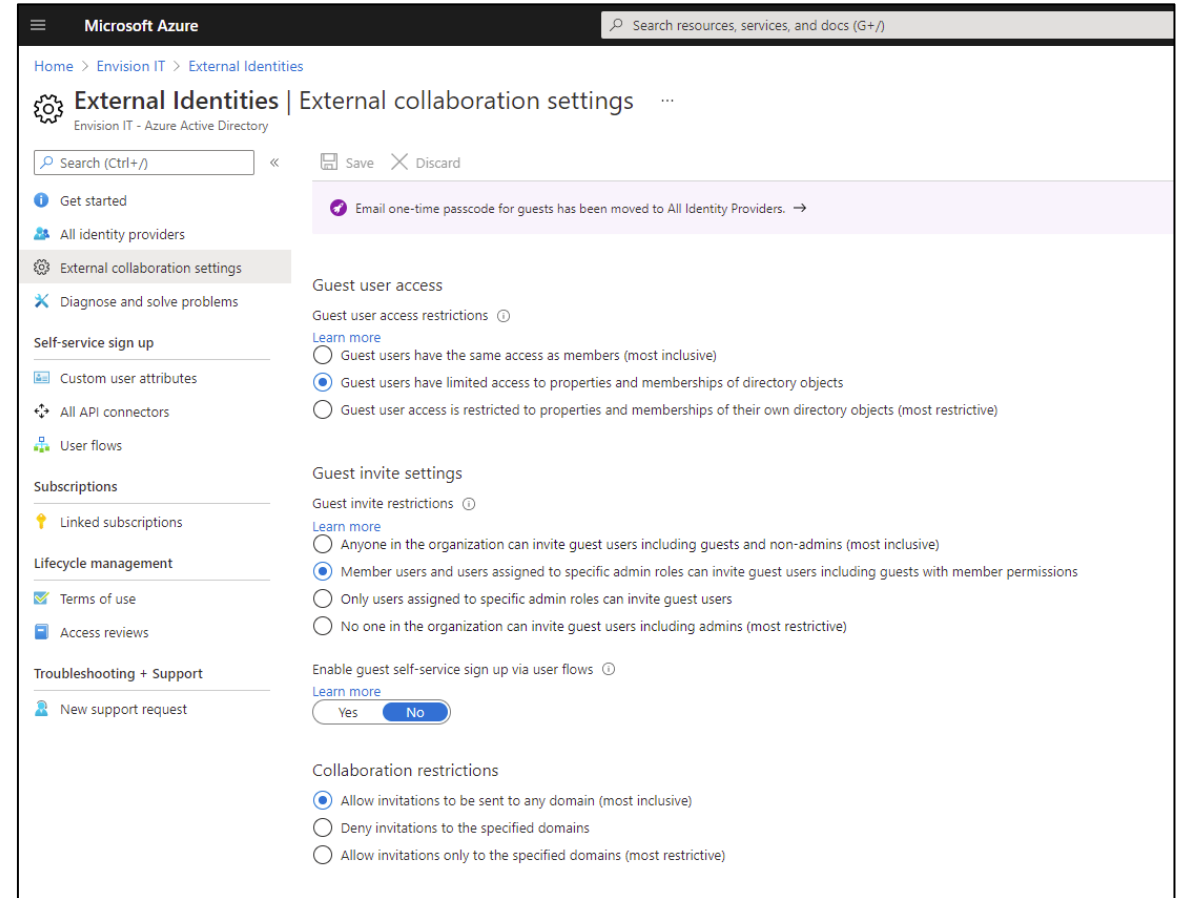
- Self-registration and workflows define onboarding process
- Some branding and customization
- Dynamic groups

## Extranet User Manager

- Pre-built .NET Core 6 sample portal
- Fully brandable and customizable
- EUM Admin portal for creating and managing users and groups
- Licensed by the pool size of external users

# Azure AD External Identities (B2B)

- Self-service sign up
  - Custom attributes
  - API connectors
- Lifecycle management
  - Terms of use
  - Entitlement packages
  - Access reviews



[External Identities documentation | Microsoft Docs](#)

ExtranetUserManager

### Sign in

someone@example.com

No account? [Create one!](#)

[Can't access your account?](#)

Next

Welcome to the Extranet User Manager demo site.

ExtranetUserManager

### Create account

Sign up with email

Sign up with Microsoft

Sign up with Google

Back

ExtranetUserManager

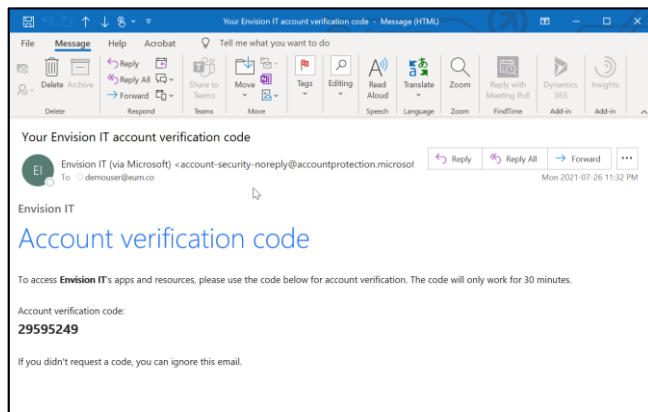
← demouser@eum.co

### Enter code

We just sent a code to demouser@eum.co

Enter code

Sign in



Microsoft

demouser@eum.co

### Review permissions

Envision IT  
eumdemo.onmicrosoft.com

**This resource is not shared by Microsoft.**

The organization Envision IT would like to:

- Sign you in
- Read your name, email address, and photo

You should only accept if you trust Envision IT. By accepting, you allow this organization to access and process your data to create, control, and administer an account according to their policies. **Envision IT has not provided links to their terms for you to review.** Envision IT may log information about your access. You can remove these permissions at <https://myapps.microsoft.com>.

Cancel Accept

ExtranetUserManager

### Add more details

You can use this email to sign in next time.

demouser@eum.co

First Name

Last Name

Job Title

Street Address

City

State/Province

Postal Code

Country

Cancel Continue

Microsoft

demouser@eum.co

### Permissions requested

Azure Registrations App  
[unverified](#)

**This application is not published by Microsoft.**

This app would like to:

- View your basic profile
- Maintain access to data you have given it access to

Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy statement. **The publisher has not provided links to their terms for you to review.** You can change these permissions at <https://myapps.microsoft.com>. [Show details](#)

Does this app look suspicious? [Report it here](#)

Cancel Accept

# Self-Service User Sign-Up – Attributes

- Choose what user information you require to provide access to Application
- Both built-in and custom attributes
- Steps to configure:
  - Define any custom attributes
  - Assign the attributes to a user flow
  - Define the page layout
  - Define any additional languages

# Define the Attributes

Microsoft Azure | Search resources, services, and docs (G+)

Home > External Identities

### External Identities | Custom user attributes

Envision IT - Azure Active Directory

Search (Ctrl+/) << + Add | Got feedback?

Name	Data Type	Description	Attribute type
City	String	The city in which the user is located.	Built-in
Country/Region	String	The country/region in which the user is l...	Built-in
Display Name	String	Display Name of the User.	Built-in
Given Name	String	The user's given name (also known as fir...	Built-in
Job Title	String	The user's job title.	Built-in
Postal Code	String	The postal code of the user's address.	Built-in
State/Province	String	The state or province in user's address.	Built-in
Street Address	String	The street address where the user is loca...	Built-in
Supplier Number	String	Custom Supplier code	Custom
Surname	String	The user's surname (also known as famil...	Built-in

### Add an attribute

Name <sup>ⓘ</sup>  
Shoesize ✓

Data Type <sup>ⓘ</sup>  
String ✓

Description <sup>ⓘ</sup>  
The user's shoe size ✓

Create

# Assign the Attributes to a User Flow

Microsoft Azure Search resources, services, and docs (G+)

Home > Envision IT > External Identities > B2X\_1\_eumdemo-sign-up

## B2X\_1\_eumdemo-sign-up | User attributes

Sign up and sign in

Search (Ctrl+/) Save Discard Manage user attributes Got feedback?

Overview

Settings

Identity providers

**User attributes**

API connectors

Customize

Page layouts

Languages

Use

Applications

User attributes are values collected on sign up. You can create custom attributes for use in your directory. [Learn more about user attributes.](#)

Name	Data Type	Description	Attribute type
<input checked="" type="checkbox"/> City	String	The city in which the user is located.	Built-in
<input checked="" type="checkbox"/> Country/Region	String	The country/region in which the user is loc...	Built-in
<input type="checkbox"/> Display Name	String	Display Name of the User.	Built-in
<input checked="" type="checkbox"/> Email Address	String	Email address of the user.	Built-in
<input checked="" type="checkbox"/> Given Name	String	The user's given name (also known as first ...	Built-in
<input checked="" type="checkbox"/> Job Title	String	The user's job title.	Built-in
<input checked="" type="checkbox"/> Postal Code	String	The postal code of the user's address.	Built-in
<input checked="" type="checkbox"/> State/Province	String	The state or province in user's address.	Built-in
<input checked="" type="checkbox"/> Street Address	String	The street address where the user is located.	Built-in
<input type="checkbox"/> Supplier Number	String	Custom Supplier code	Custom
<input checked="" type="checkbox"/> Surname	String	The user's surname (also known as family n...	Built-in

# Define the Page Layout

Microsoft Azure Search resources, services, and docs (G+)

Home > Envision IT > External Identities > B2X\_1\_eumdemo-sign-up

## B2X\_1\_eumdemo-sign-up | Page layouts

Sign up and sign in

Search (Ctrl+/) Save Discard

Overview

Settings

- Identity providers
- User attributes
- API connectors

Customize

- Page layouts**
- Languages

Use

- Applications

Got a second? We would love your feedback on customizing user flows →

Select the layout of the form users who are signing up are shown. This form consists of the attributes you choose to collect in this user flow, and you can choose the order of how they are displayed and how users provide input. [Learn more about customizing your page.](#)

Attribute collection page

↑ Move up ↓ Move down ↕ Move to top ↓ Move to bottom

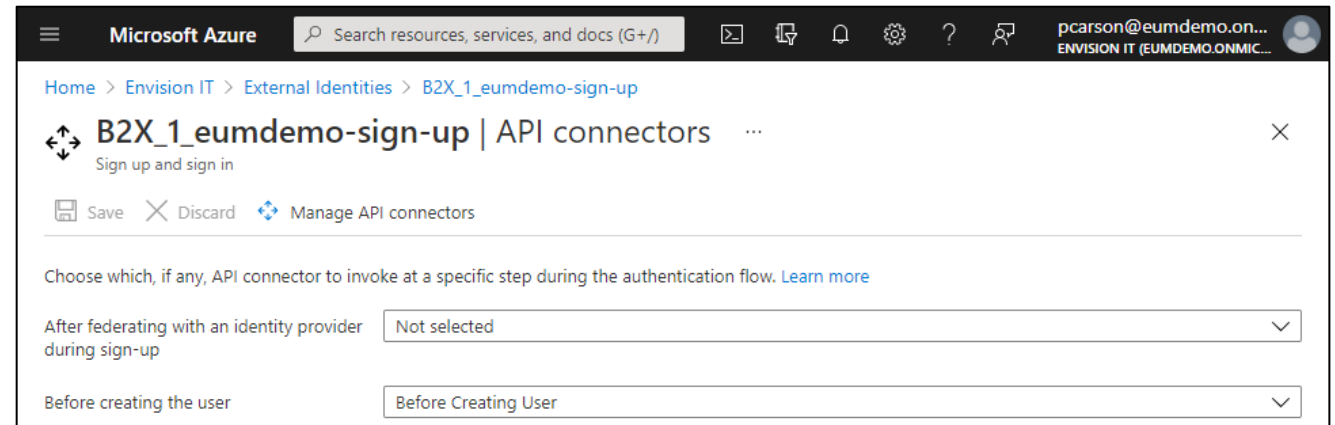
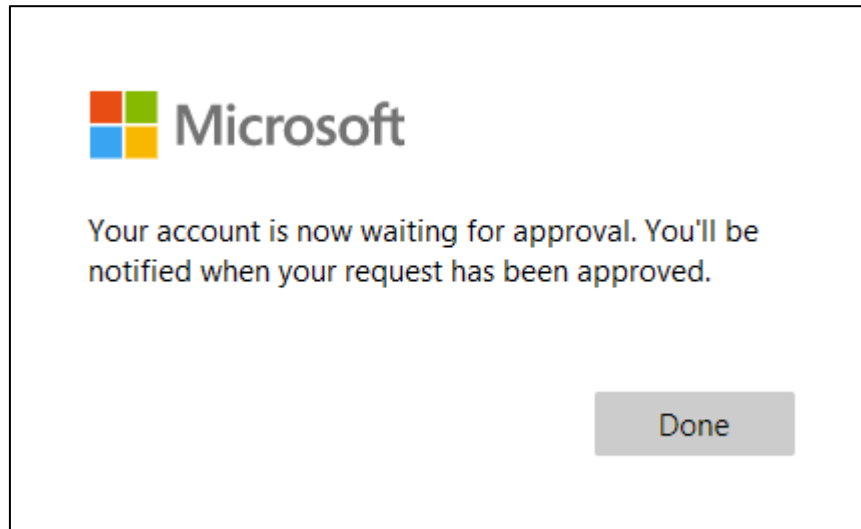
Name	Optional	User input type	Label
Email Address	Yes		Email Address
Given Name	No	TextBox	First Name
Surname	No	TextBox	Last Name
Job Title	Yes	TextBox	Job Title
Street Address	Yes	TextBox	Street Address
City	Yes	TextBox	City
State/Province	Yes	TextBox	State/Province
Postal Code	Yes	TextBox	Postal Code
Country/Region	Yes	DropDownSingleSelect	Country

https://portal.azure.com/#



# Custom Approval Workflows

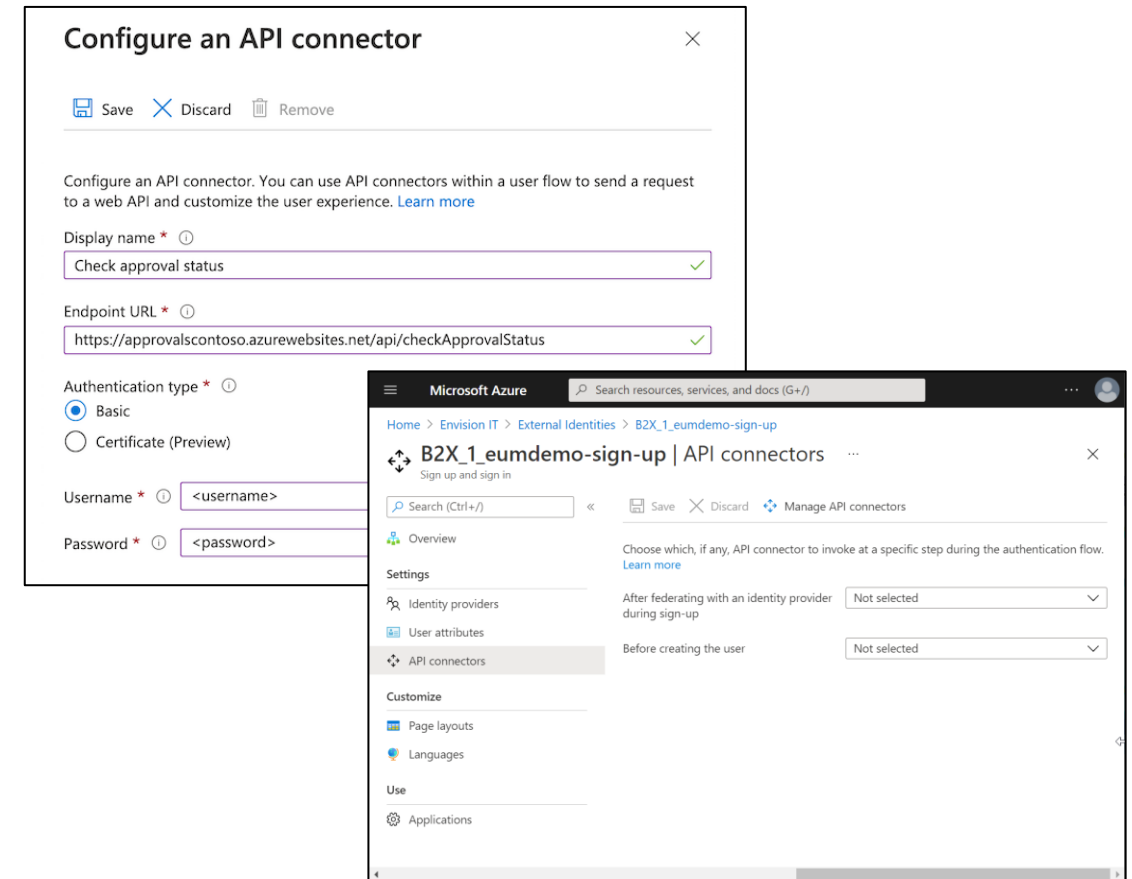
- API connectors allow you to integrate custom approval workflows into the self-service sign up



[Add custom approvals to self-service sign-up flows - Azure AD | Microsoft Docs](#)

# Custom Approval Workflows

- Preferred approach to building a full custom API is to use Logic Apps
- Use Azure API Management in front of Logic App to handle the security
  - Basic auth or certificate
- Can have rules to assign group memberships
- Can also be done with dynamic groups



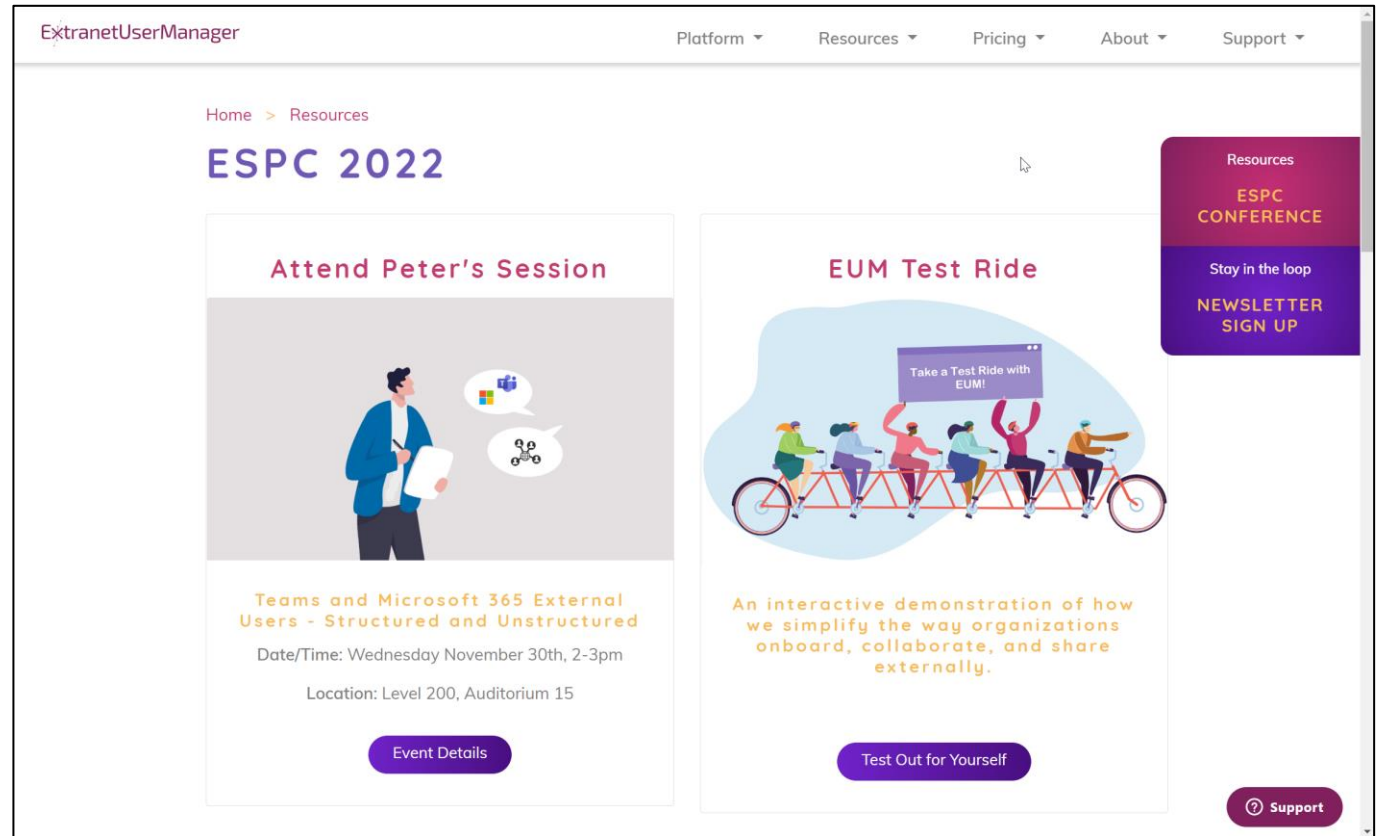
[Add custom approvals to self-service sign-up flows - Azure AD | Microsoft Docs](#)

# Demo

Self-Service Sign-Up

<https://azureregistration.azurewebsites.net/>

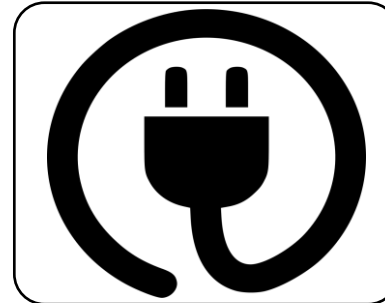
# Session and Conference Resources



[www.eum.co/espc](http://www.eum.co/espc)

# Portal Scenarios

# Scenarios Overview



## Electricity Canada

- 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 Electricity 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

# Scenario One – Electricity Canada Member Portal Assessment

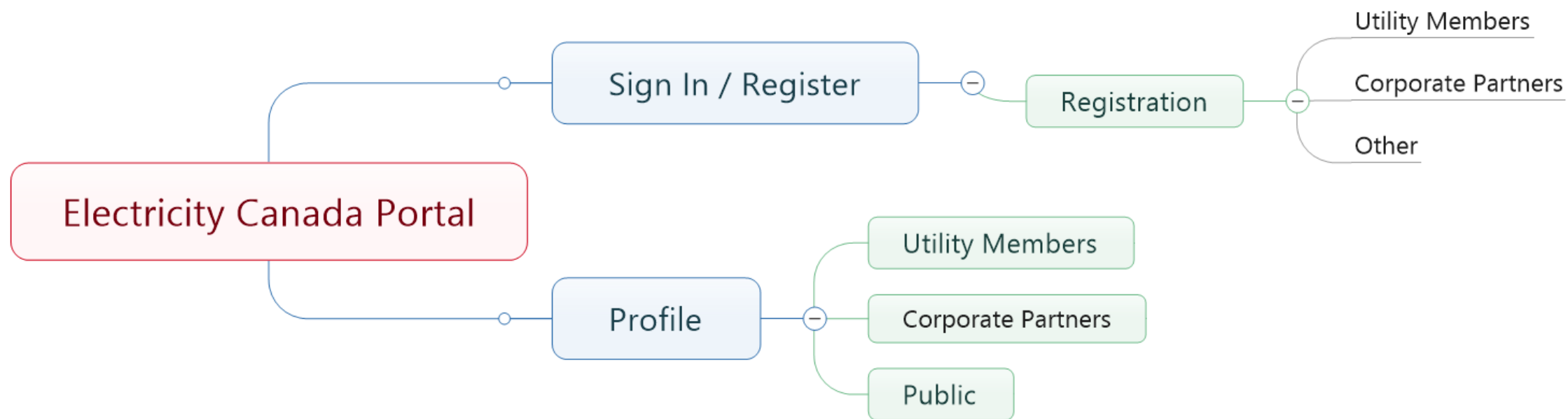
- **Review and provide recommendations around:**
  - Electricity.ca – the Association’s current public website
  - Powerline – the Association’s extranet site
  - Continuing Education program – no online resource currently exists
  - Data Portal – a series of databases, reports and visualizations on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



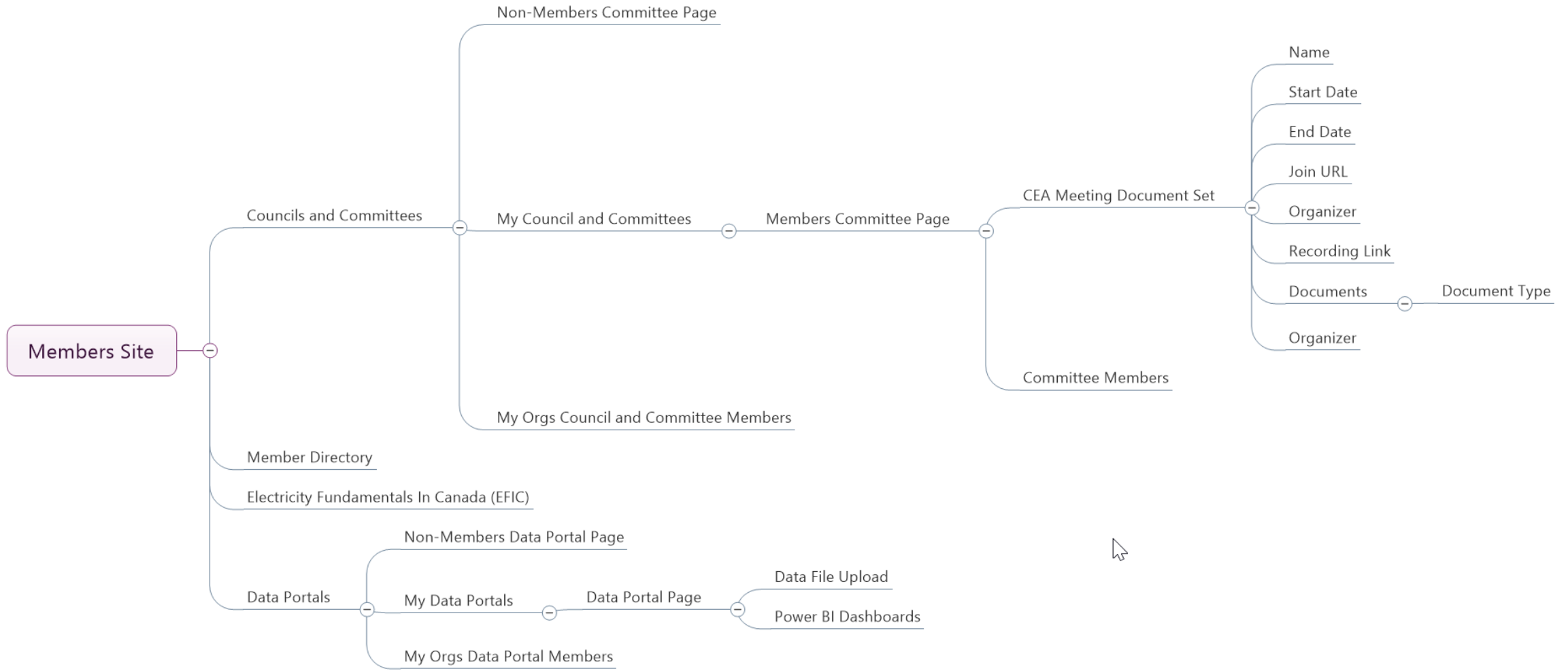
# Scenario One – Electricity Canada Portal Solution

- **Implementation of Teams Governance tools and training for all Electricity Canada staff**
  - Microsoft 365 Discovery Workshop
  - Envision IT's Microsoft 365 Maturity Model training and roadmap
  - Orchestra's Teams Governance tool to standardize how Microsoft 365 is being used
- **Microsoft's Azure AD B2B single sign-on**
- **Creation of a branded Electricity Canada 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



# Electricity Canada Portal Demo

# Electricity Canada Member Onboarding and Management

EN Login / Register

## Member

Members generate, transmit, and distribute electricity.

## Corporate Partner

Corporate Partners include manufacturers and suppliers of materials, technology, and services to the electricity sector.

## Public

Other organizations associated with the electricity sector or have a special interest in electricity issues.

### Registration

<p>Email *</p> <input type="text" value="adacosta@envisionit.com"/>	<p>Organization *</p> <input type="text" value="Please select your organization"/>
<p>First Name *</p> <input type="text"/>	<p>Job Title *</p> <input type="text"/>
<p>Last Name *</p> <input type="text"/>	<p>Phone Number *</p> <input type="text"/>
<p>Preferred Language *</p> <input type="text" value="Please select your preferred language"/>	

Display my information in the Member Directory ⓘ

I would like to subscribe to the Corporate Partners mailing list

I would like to subscribe to the Current Affairs Newsletter

# Electricity Canada Member Onboarding and Management

**Electricity Canada** / **Électricité Canada**  
Our energy future / Notre avenir énergétique

Home Councils & Committees Directory Training Data Portals EN

Home > Members

## Members

You've reached the Members Portal. The portal is your gateway to:

- Your Council/Committee/Task Group platforms where you will find information related to your area of expertise within the industry.
- The Member and Corporate Partner's directory.
- The Electricity Fundamentals in Canada (EFIC) course, a training course for anyone working in the electricity sector, as well as Government, regulators, suppliers to the industry, universities, colleges. EFIC is designed to cover the big picture of how the industry works

### Directory

Browse the directory and connect with people & organizations

### Training

Click here to register/login to Electricity Fundamentals in Canada

### My Committees

Test Committee	<a href="#">View Committee</a>
----------------	--------------------------------

### My Data Portals

CEA Data Portal	<a href="#">View Data Portal</a>
-----------------	----------------------------------

### Tweets by @Electricity\_CA

Electricity Canada @Electricity\_CA  
Canadian electricity is already some of the cleanest energy in the world. Our sector is working together to make it even cleaner. Learn more at [electricity.ca](#).

**For the future.**

Electricity Canada @Electricity\_CA  
Episode 058 of the Flux Capacitor podcast is now live! Our guest Dr. Bruce Lourie (@brucelourie), Board Chair of @CanAccelerator and President of @iveyfoundation discusses the need to promote energy transition pathways, collaboration and more.

[Embed](#) [View on Twitter](#)

# Committee Landing Page

The screenshot shows the Electricity Canada website's Test Committee landing page. The page features a navigation bar with the Electricity Canada logo and menu items like Home, Councils & Committees, Directory, Training, and Data Portals. The breadcrumb trail indicates the path: Home > Members > Councils and Committees > Test Committee. The main content area is divided into three columns: Governance, Upcoming Meetings, and Contact. The Governance column lists three PDF documents and a link to Shared Documents. The Upcoming Meetings column shows a 'New Meeting' button and a message that no upcoming meetings were found. The Contact column includes an email link and a member profile for Envision IT. The Past Meetings column lists two links: Test Today and Demo Meeting. The footer contains copyright information and social media icons.

**Electricity Canada** / **Électricité Canada**  
Our energy future / Notre avenir énergétique

Home | Councils & Committees | Directory | Training | Data Portals | EN | EN

Home > Members > Councils and Committees > Test Committee

## Test Committee

### Governance

- [PDF 01.pdf](#)
- [PDF 02.pdf](#)
- [PDF 03.pdf](#)

[Shared Documents](#)

### Upcoming Meetings

No upcoming meetings found

[New Meeting](#)


### Past Meetings

- [Test Today](#)
- [Demo Meeting](#)

### Contact

[-Email-](#)

### Members

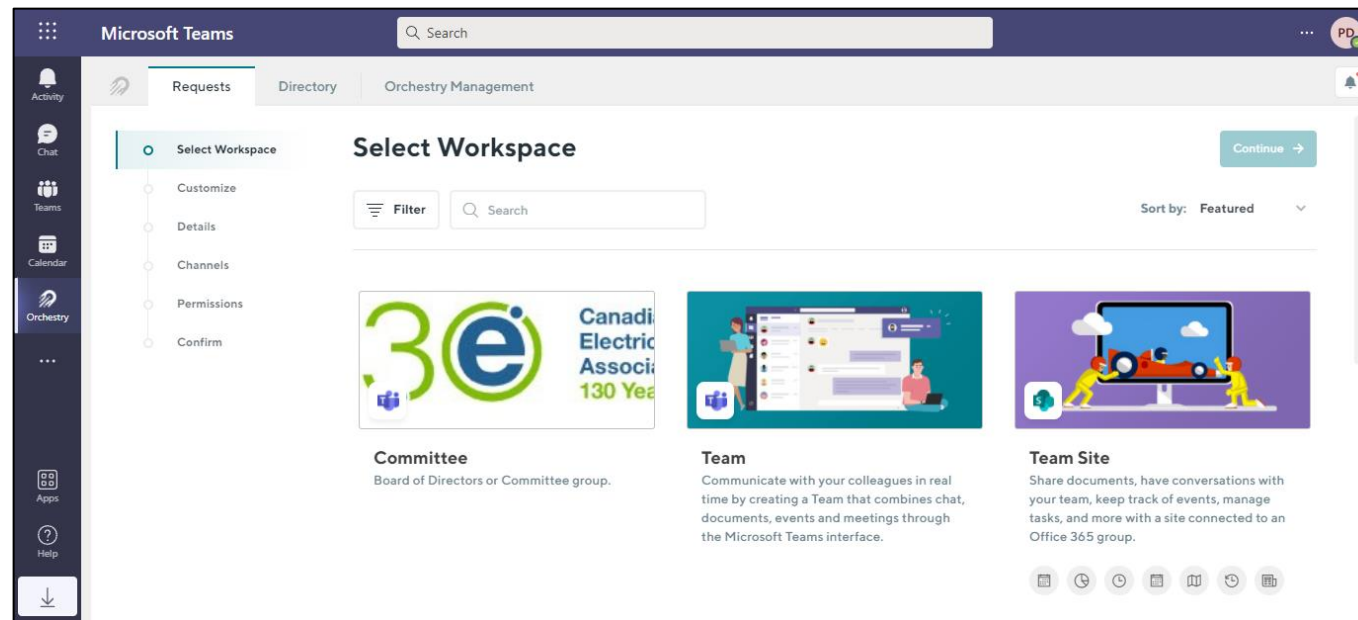
 **Envision IT**  
[envisionit@electricity.ca](mailto:envisionit@electricity.ca)

© Electricity Canada. All Rights Reserved. [Privacy](#) | [Terms of use](#) | [Accessibility](#)

[f](#) [t](#) [in](#)

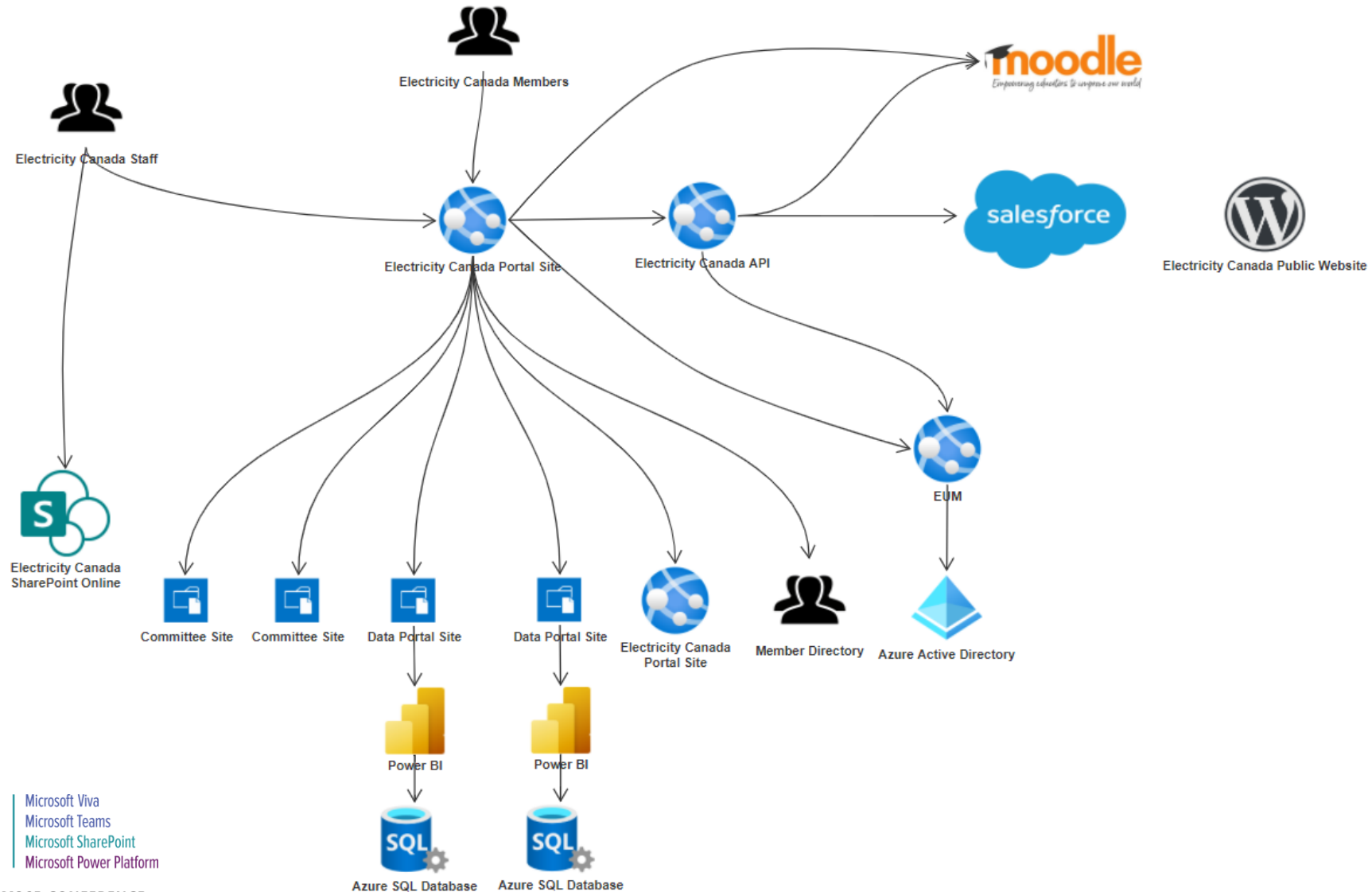
# Electricity Canada Committee Team and Site Provisioning

- 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





# Scenario One - Electricity Canada 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



# Scenario Two – myOACAS Overview

- Self-registration
  - Integrated into Desire2Learn and Training Orchestra
  - Auto-approval based on email domain
- Portal site with published content from SharePoint Online
- Access to SharePoint Online Group Sites
- Training delivered through Desire2Learn and Training Orchestra
  - Course Catalog integrated with Stripe payment

## 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 \*

First Name \*

Job Title \*

Last name \*

Business Phone \*

Preferred Language \*

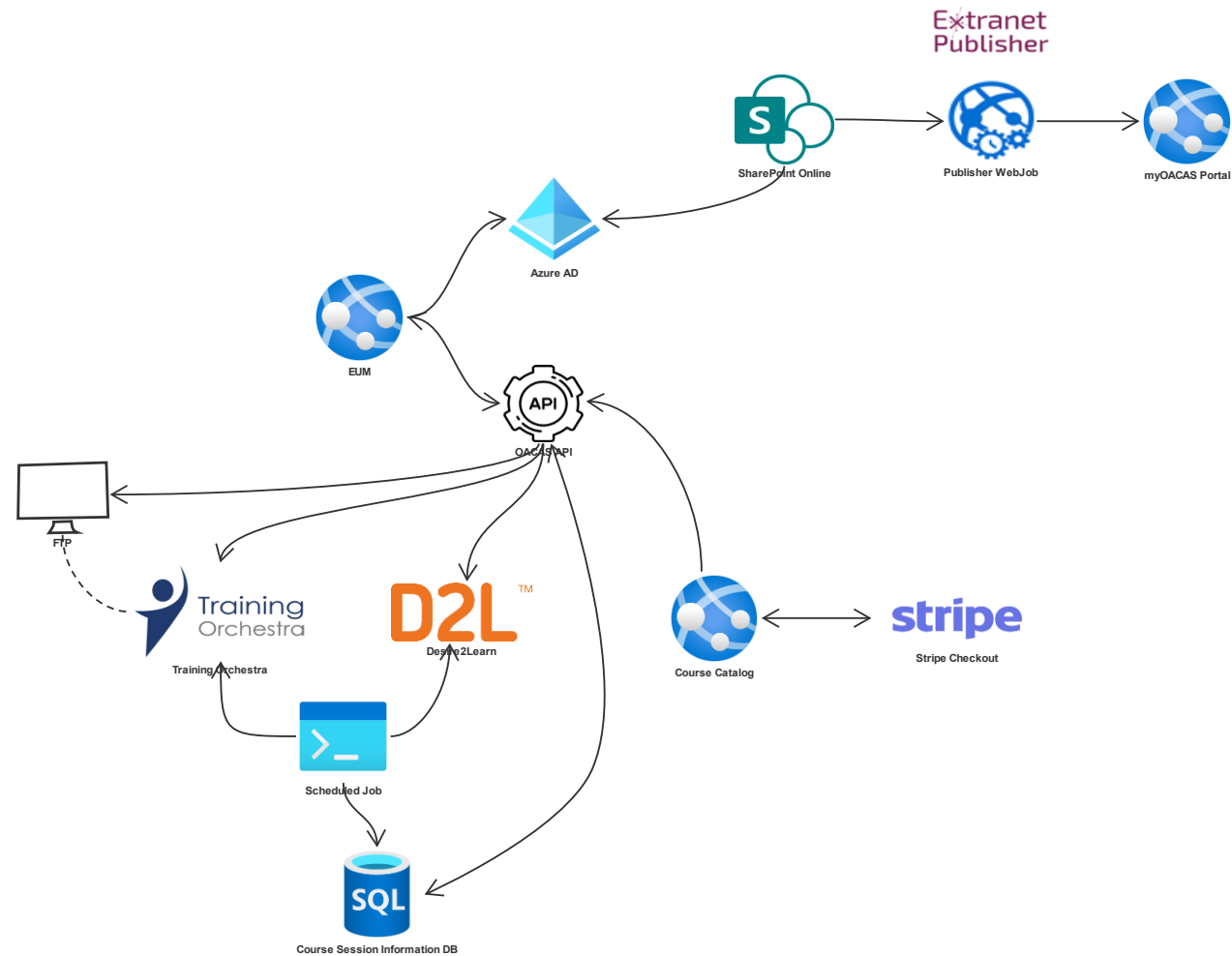
Mobile Phone

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 robotreCAPTCHA  
Privacy - Terms

# OACAS Solution Architecture

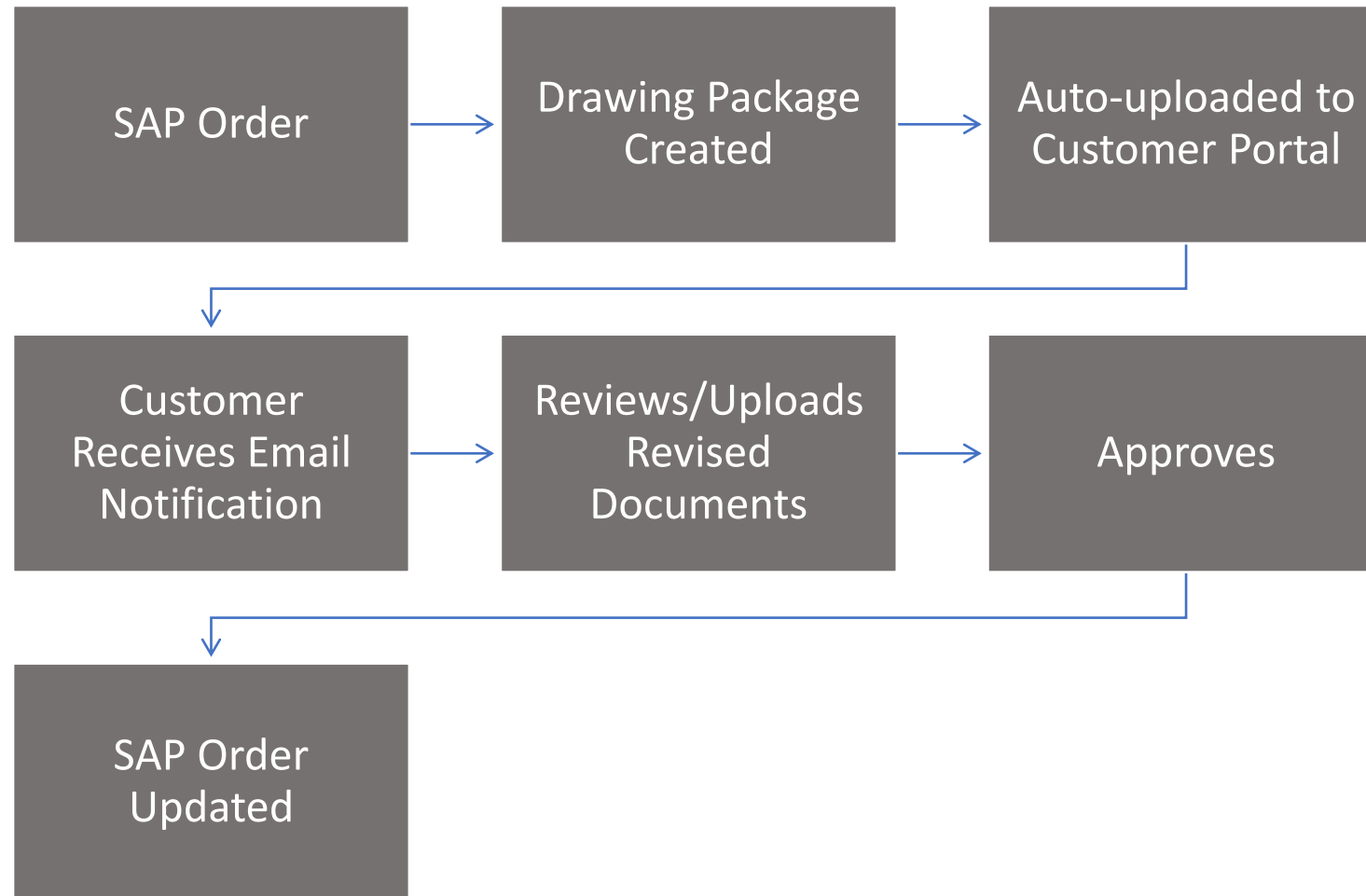


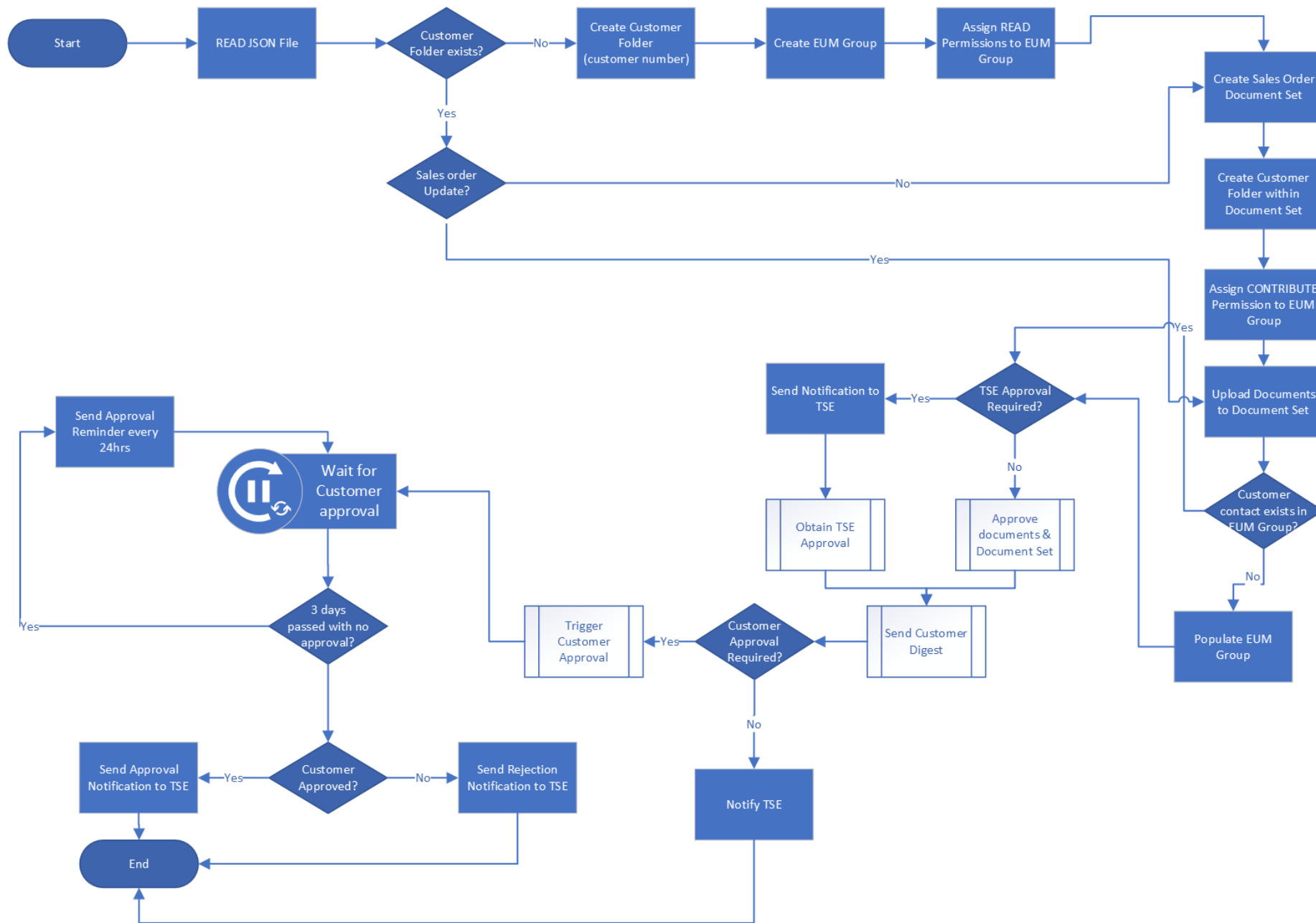
# Scenario Three – Mold Masters: Engineering Extranet

- 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









Welcome to the



Sales Orders

Order Number: 1234567

Order Number	1234567
TSE	gdhillon@envisionit.com
Customer Approval	<a href="#">Begin Approval</a>
Customer Name	Sprint Demo
Reference Number	13192-01
Mold Number	6501340011
PO Number	2124-13 Job 13192-01
ECR	6343238
ECR Notes	<p>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.</p>

[Upload](#) [Download](#)

<input type="checkbox"/>	Filename ↑↓	Line Item ↑↓	Drawing Description ↑↓	File Type ↑↓	Modified ↑↓	Size ↑↓
<input type="checkbox"/> <a href="#">↓</a>	1234567EGA11 E0-10.PDF	10	System General Assembly	PDF	11/1/2021 3:57:39 PM	192196
<input type="checkbox"/> <a href="#">↓</a>	1234567ENP11 B0-10.PDF	10	Name Plate	PDF	11/1/2021 3:57:38 PM	192196
<input type="checkbox"/> <a href="#">↓</a>	1234567ESPL0-10.PDF	10	System Parts List	PDF	11/1/2021 3:57:39 PM	192196
<input type="checkbox"/> <a href="#">↓</a>	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

Date Published

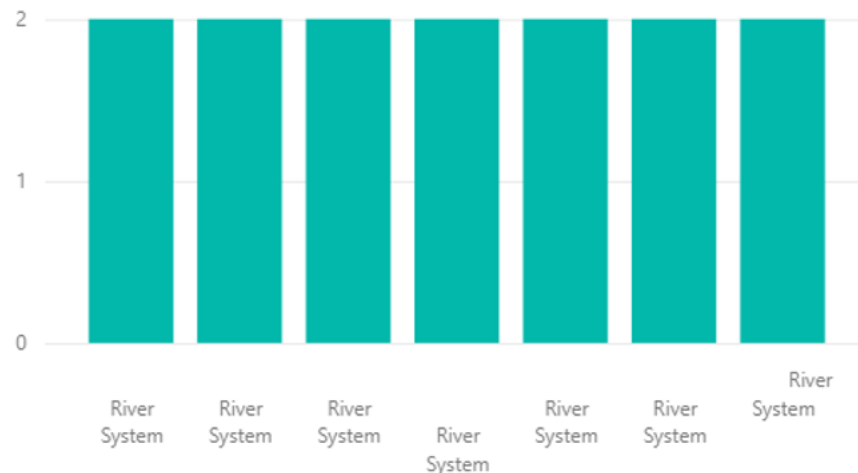
30/01/2020 20/02/2020



Region

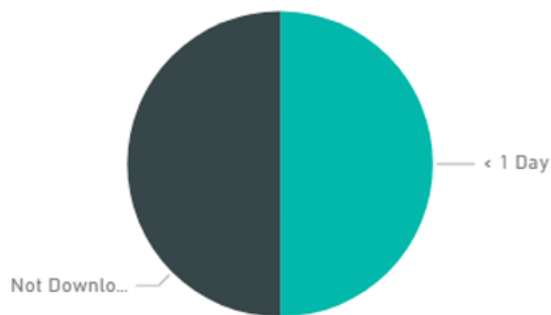
- Northeast Operations
- Northwest Operations

Published by River System



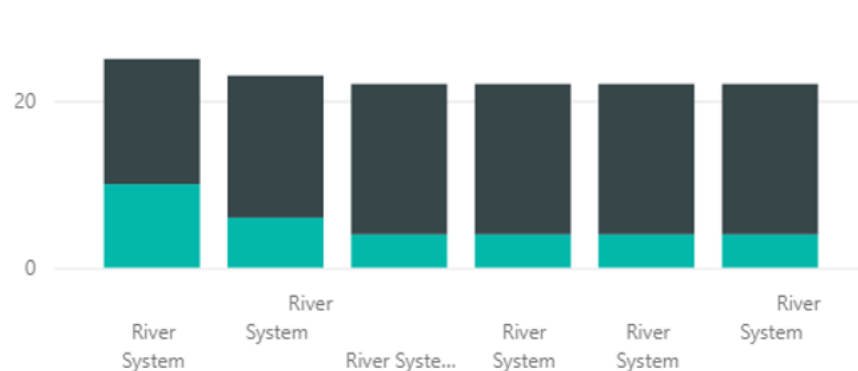
DisplayName	Downloaded	Not Downloaded
User10	12	0
User12	4	11
User13	0	12
User14	0	12
User15	0	12
User16	0	12
User17	0	12
User21	1	11
User22	3	10
User23	0	12
User6	12	0
<b>Total</b>	<b>32</b>	<b>104</b>

Number of Documents by Days to Download Bucket



Downloaded by River System and Days to Download Bucket

Days to Download Bu... ● < 1 Day ● Not Downloaded



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

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# Extranet Documents

## Extranet Documents Portal

Peter Carson

### Financial Reports

#### 2021-10 - Open

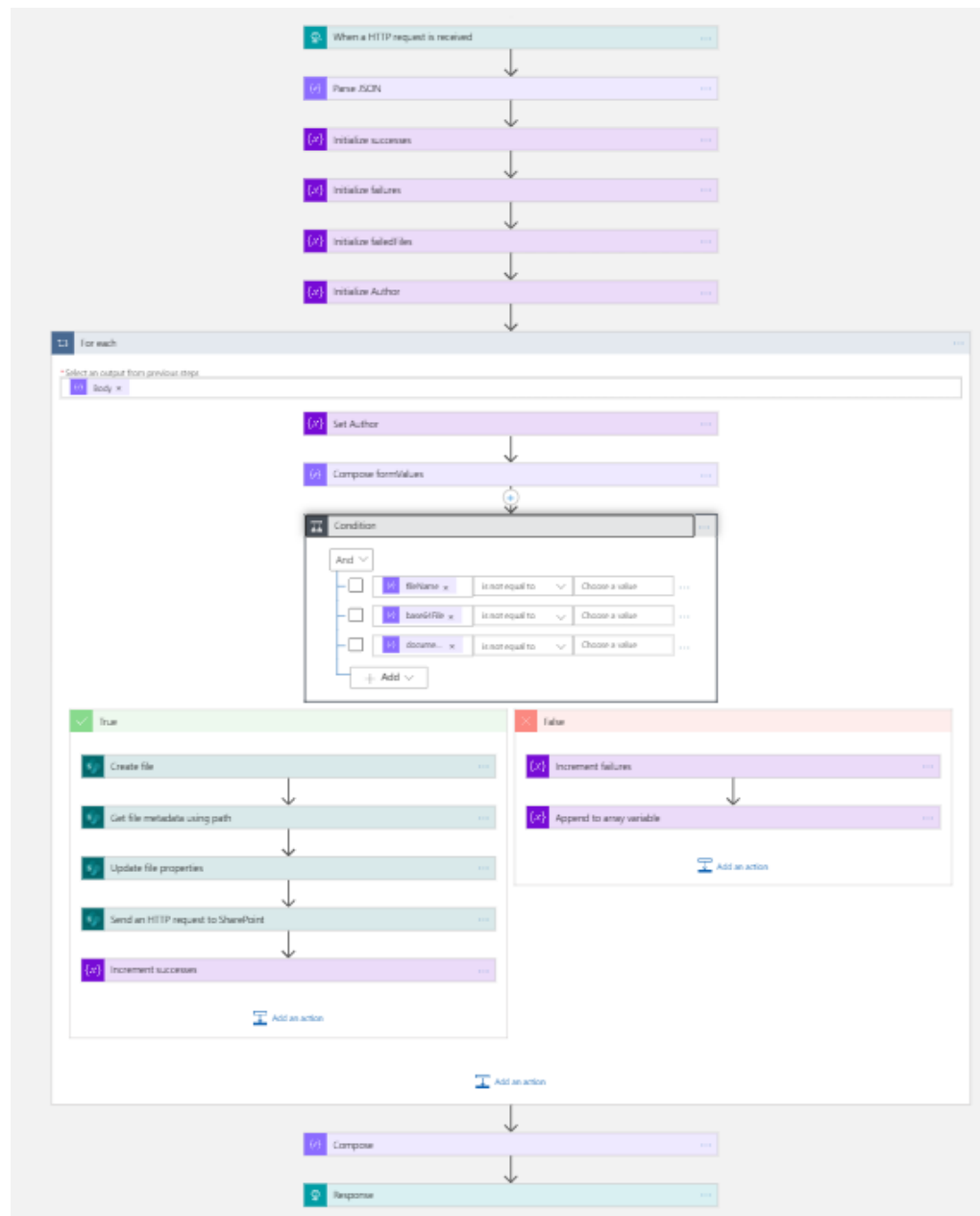
##### Financial Report Status

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

<input type="checkbox"/>	Filename ↑↓	Type ↑↓
<input type="checkbox"/>	PDF 02.pdf	Cognos GL
<input type="checkbox"/>	PDF 05.pdf	Accounts Receivable
<input type="checkbox"/>	PDF 01.pdf	Cognos Import File
<input type="checkbox"/>	PDF 03.pdf	Balance Sheet
<input type="checkbox"/>	PDF 04.pdf	Income Statement



European  
SharePoint  
Office 365 & Azure  
Conference

*Ukrova*

PLEASE RATE THIS  
SESSION ON THE APP

