Extending Office 365 and Teams to Your Partners

Wednesday, March 25, 2020

12 – 12:30 PM EST

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2008 Envision IT built custom Extranet solution

2009

2010

IMPACT AWARDS Winner

2011 Productization of code base begins

2012 Extranet User Manager (EUM) Installer created

2014 Office 365 support

2015 EUM Brand and Website launched

2016 Azure B2B support

2017 Channel Partner program launched

2018 EUM V4 Launched

2019 User-Centric EUM Login launched

IT SECURITY AWARDS

METALOGIX BEST OF BREED

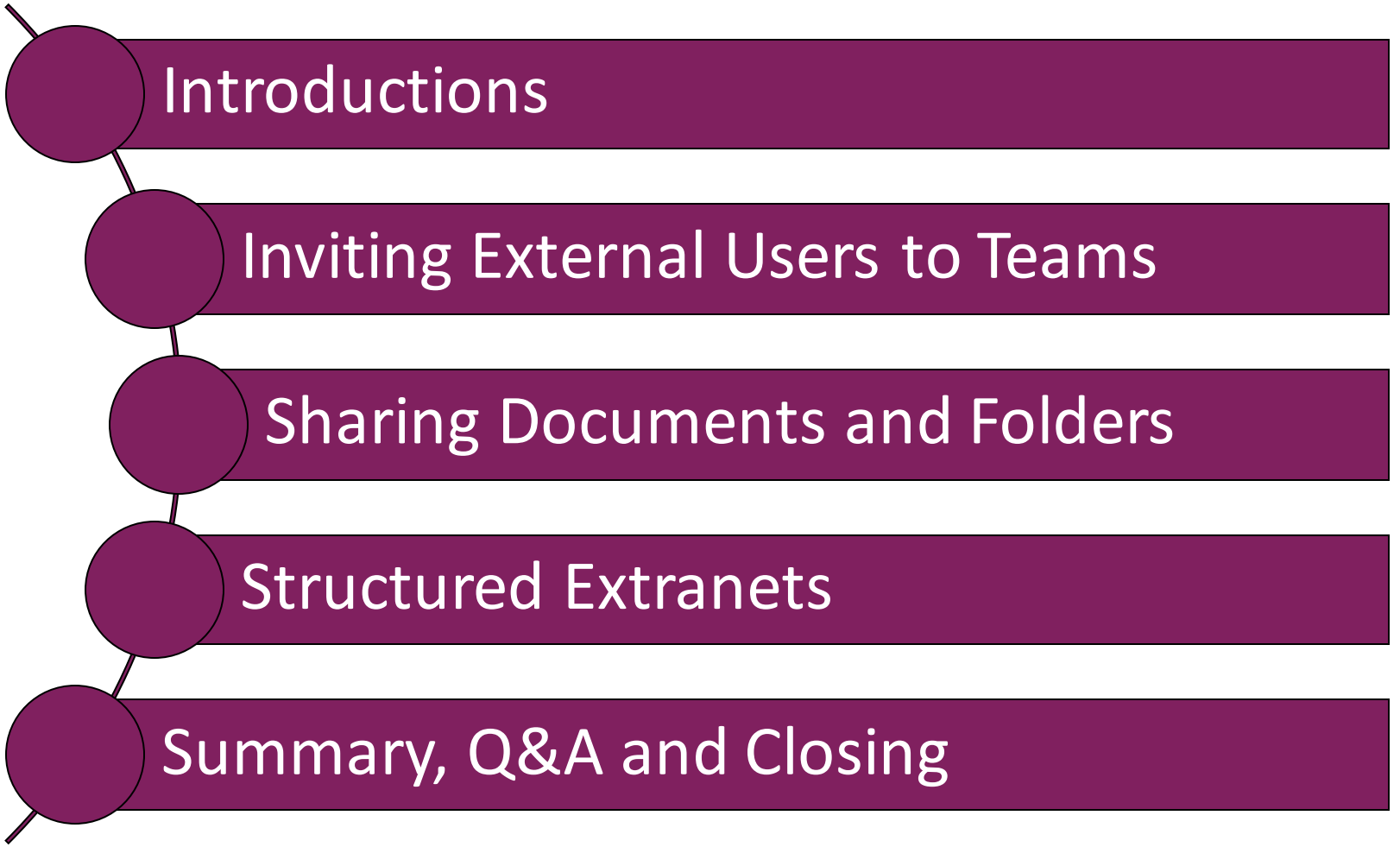
International Association of Microsoft Channel Partners™
Apps Development Partner Award 2015
WINNER - CANADA Region

Making the News!

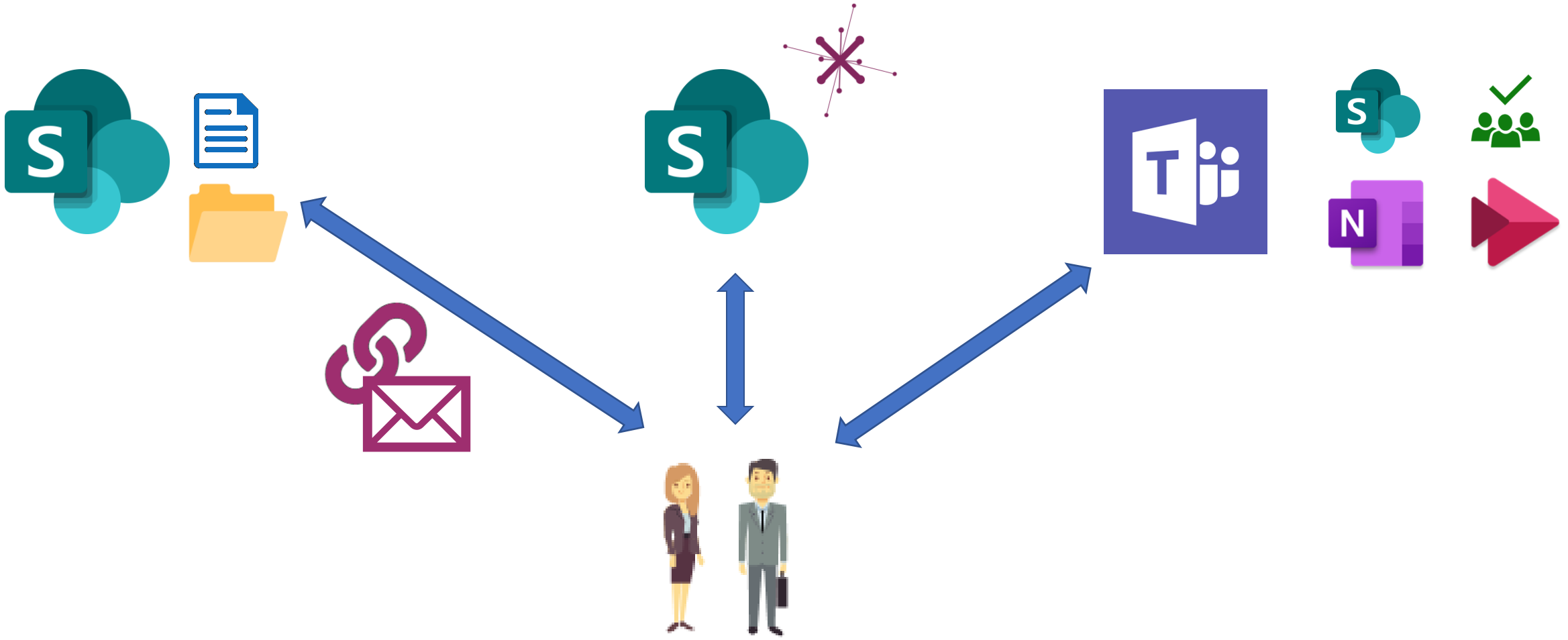
Exclusive interview with Mark Kashman and Stephen Rice of the Microsoft SharePoint Team

eum.co/resources/articles/external-sharing-interview-with-the-sharepoint-product-team

Agenda

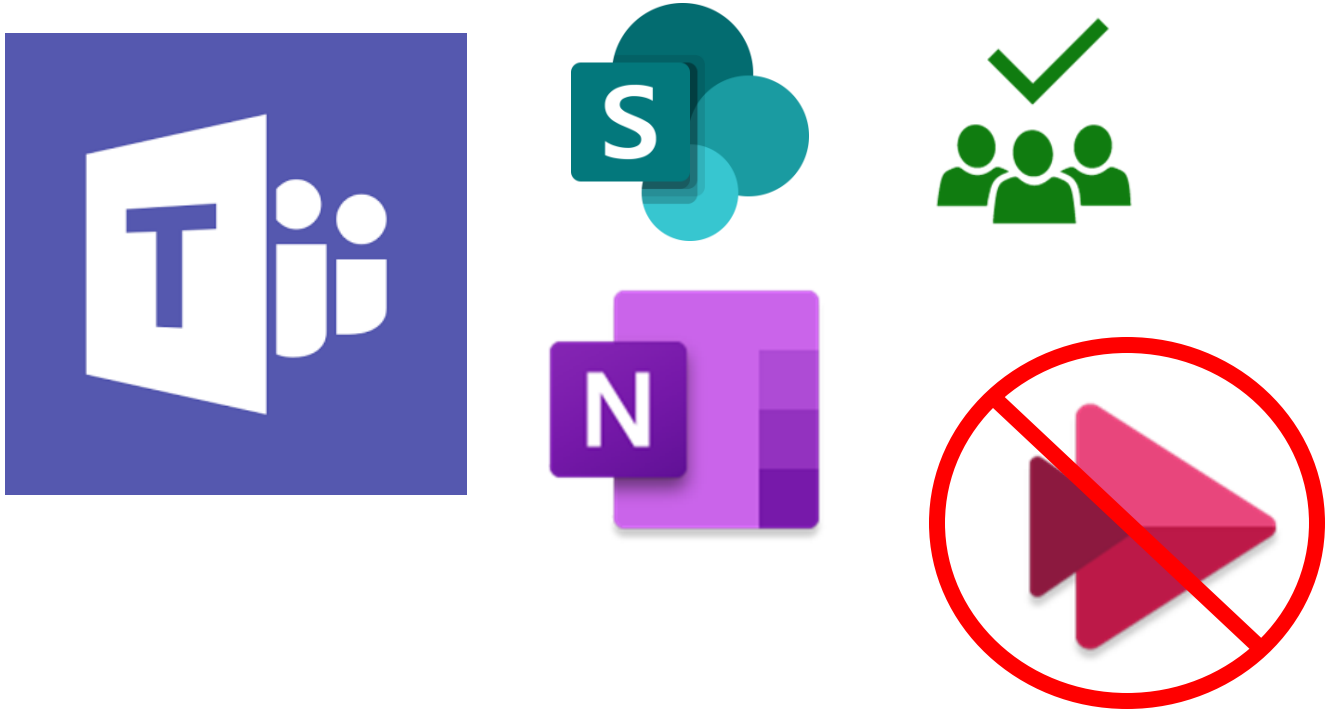

Introductions
Inviting External Users to Teams
Sharing Documents and Folders
Structured Extranets
Summary, Q&A and Closing

Working with External Partners



External Users in Teams

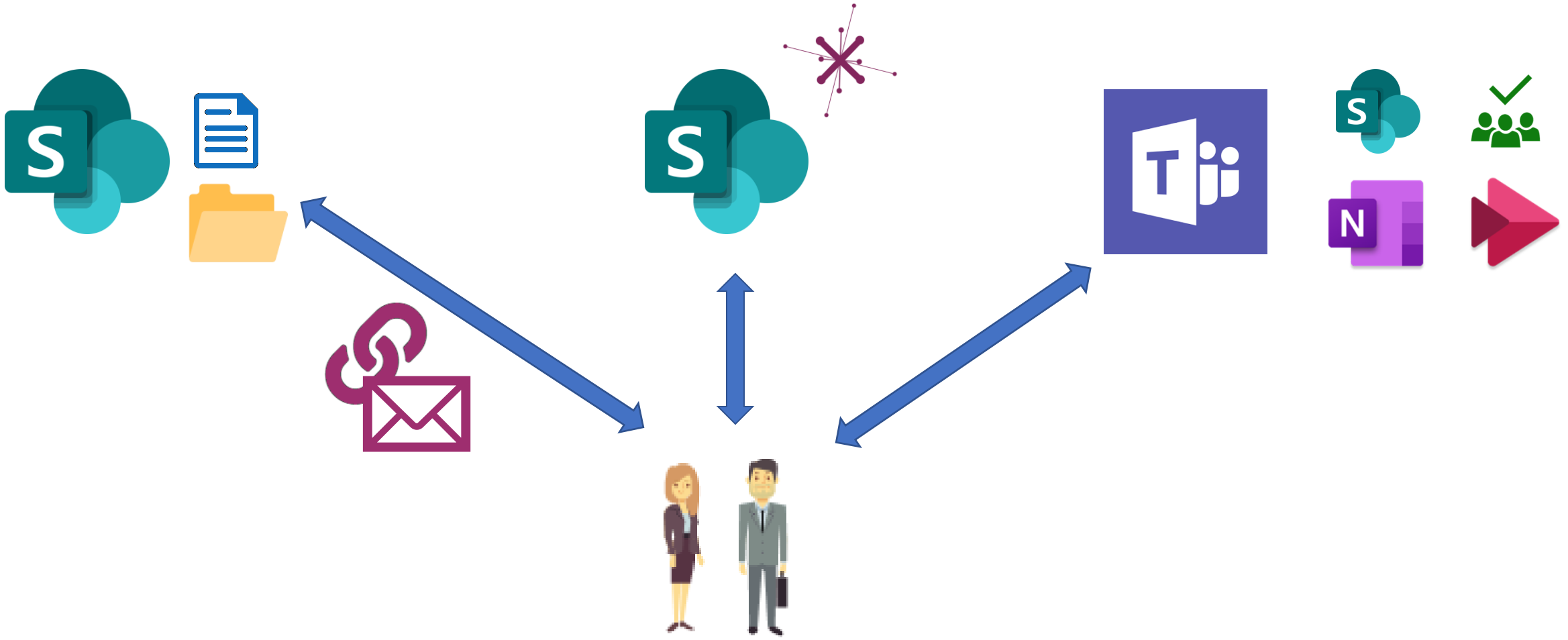
- **Unlimited number of external users can be invited to a Team**
- **No license required**
- **Signing in**
  - Use their own Office 365 or Microsoft credentials
  - Google
  - One time passcode
- **Need to switch Teams tenants if they are using Teams too**



VRxTherapy.org

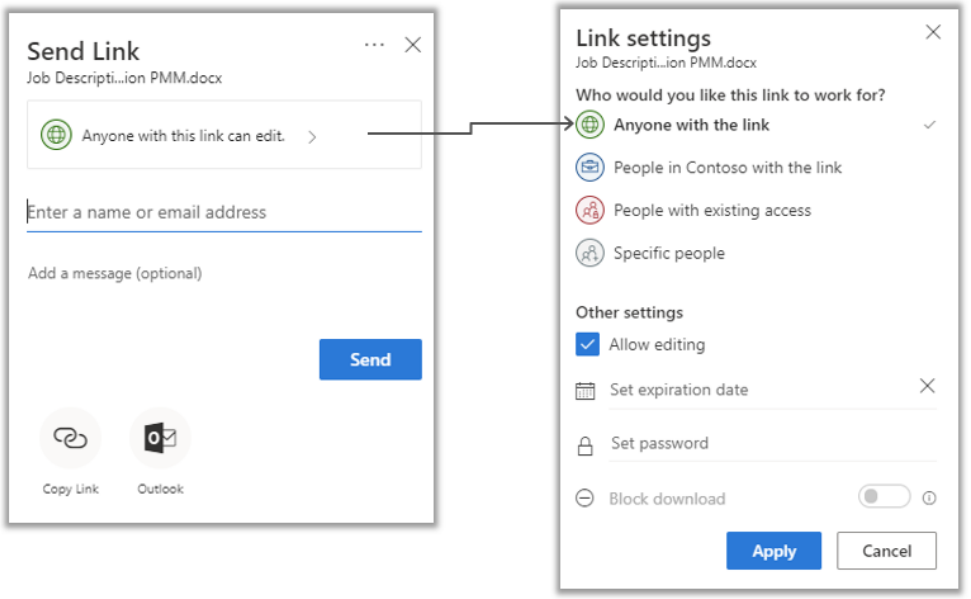
- Leveraging VR to Reduce & Eliminate Pain
- https://www.vrxtherapy.org
- Learn more about Robert at his blog www.RockTheChair.com

Working with External Partners



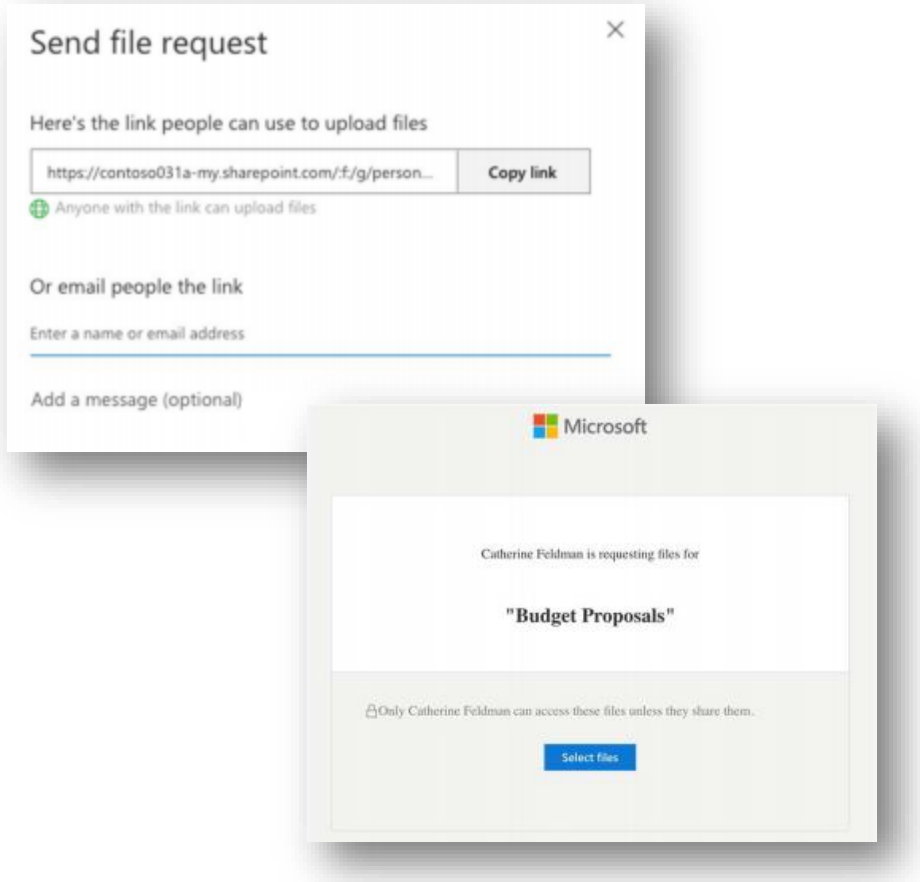
Unstructured Extranets with Office 365 External Sharing

- **External Sharing in Office 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



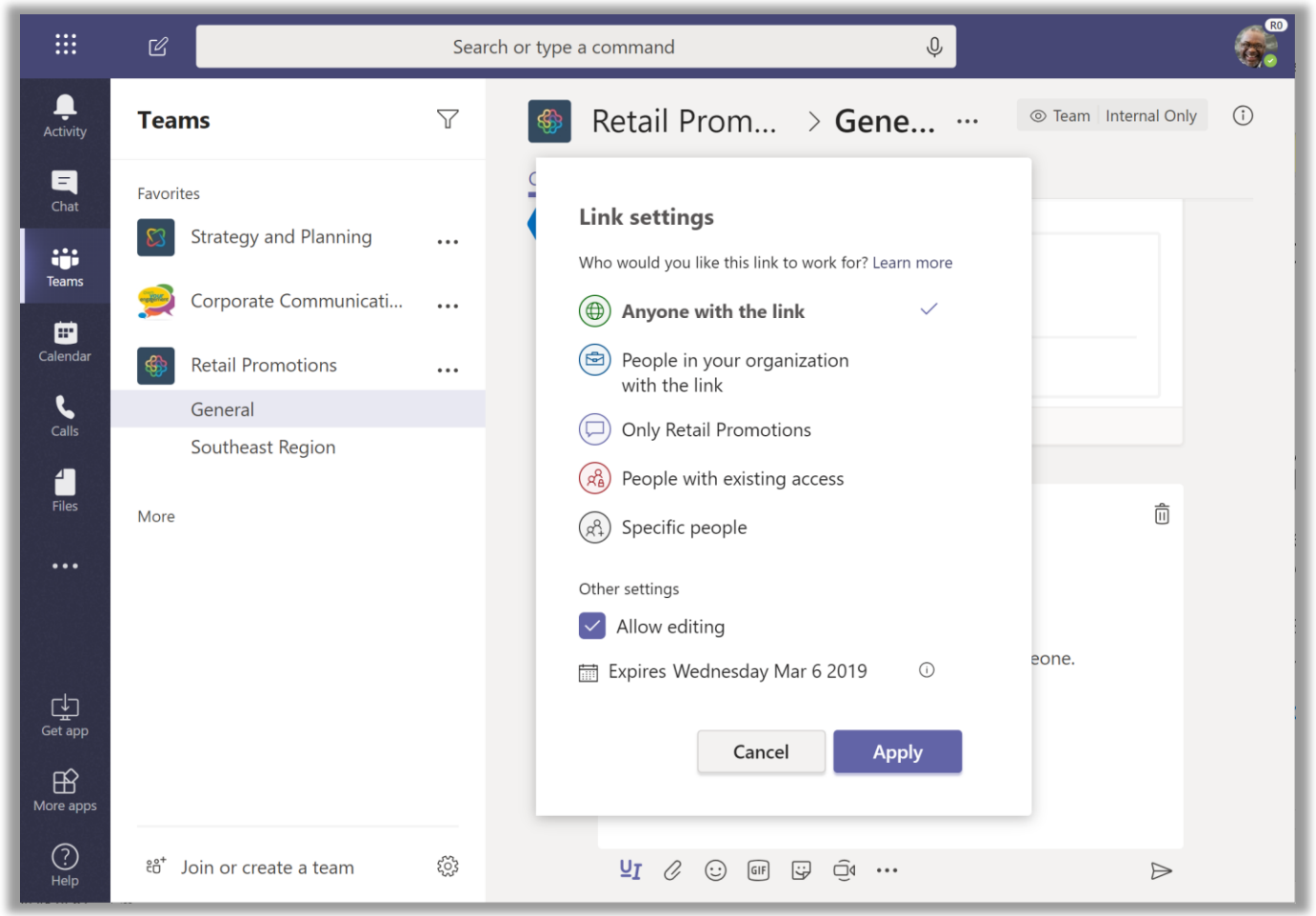
Request Files

- 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



eum.co/resources/articles/external-sharing-announcements

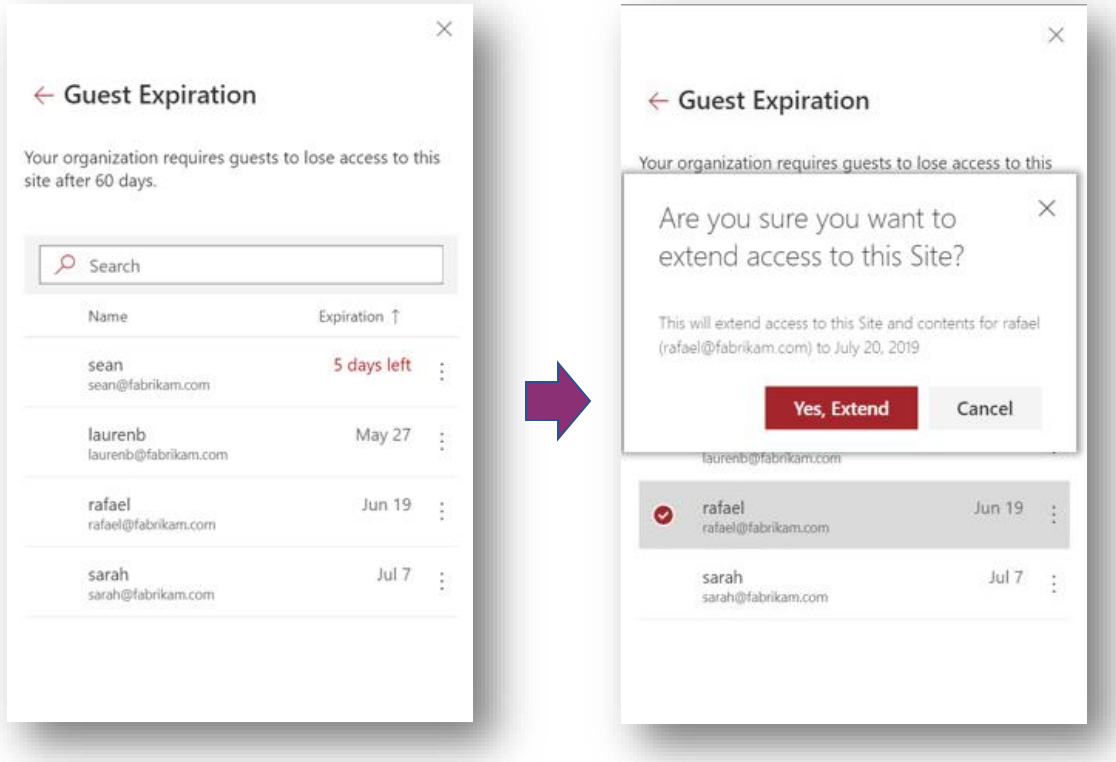
Sharing in Microsoft Teams



- **Complete set of sharing features in Teams**
- **Share files without creating unintended copies**
- **Follows all admin settings and policies you've configured**

Expiring External Access

- Site admins can define how long a guest user has access to site contents
- IT access policy defined at the organization level (ie. All users will lose access after 60 days)
- Site admin can extend access for users expirations if additional time is permitted



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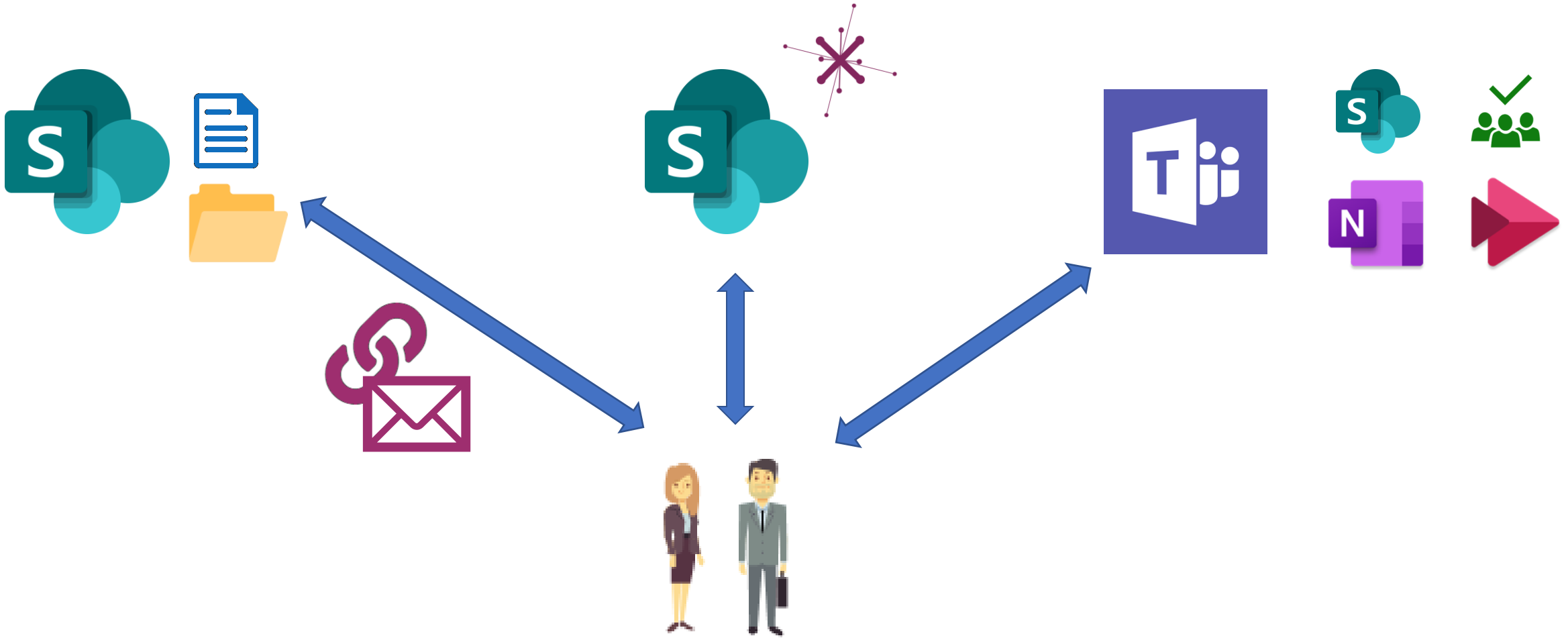
Working with External Partners



Unstructured vs. Structured Sharing

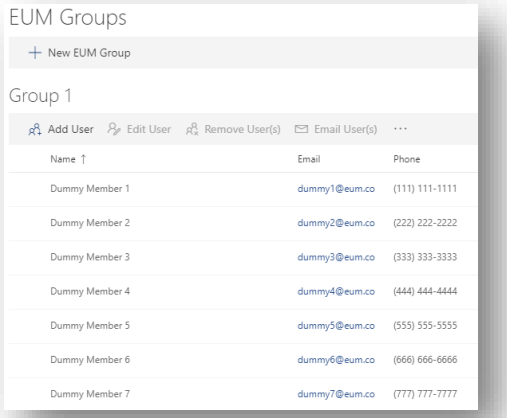
External Sharing

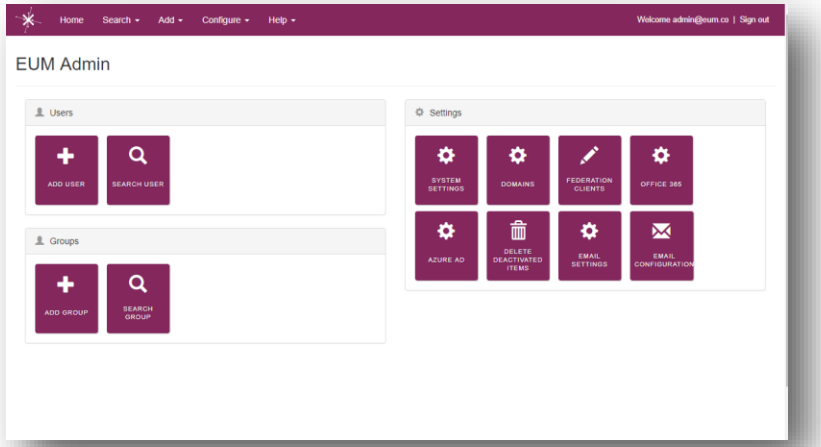
- Sharing with a few people
- Co-authoring on individual documents
- You are the sole administrator of permissions
- Eliminate the use of other shadow IT within the organization
- Can be just SharePoint, or also Teams

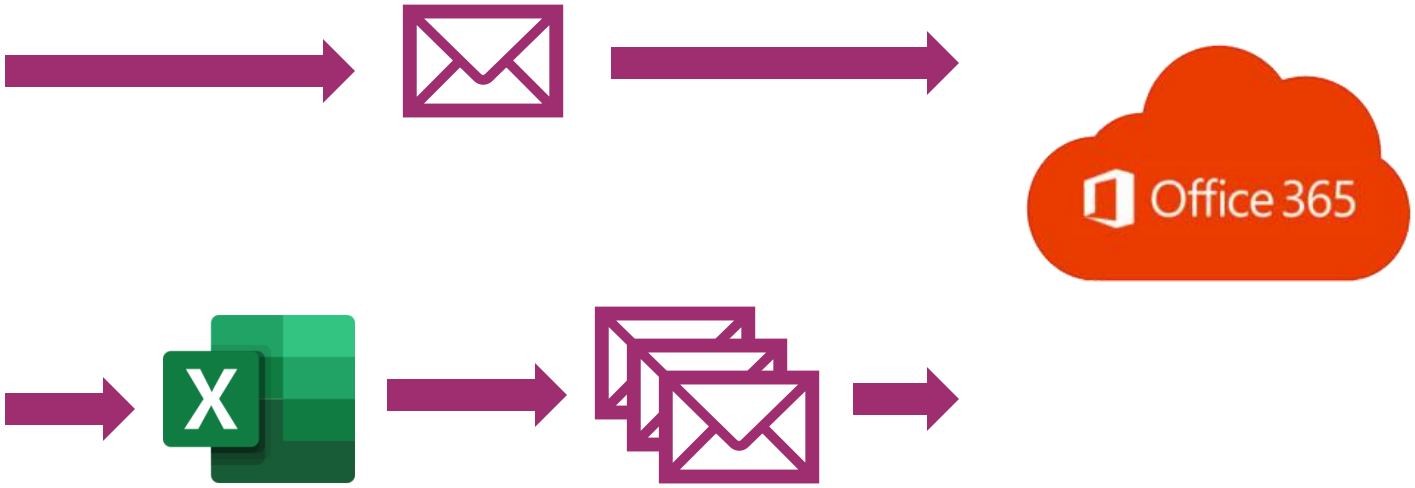
EUM with Azure B2B

- Sharing with many people with granular permission sets
- Self service functionalities like Self Registration, My Profile, etc.
- Delegation to the business owner to administer and manage sites they own as well as tier 1 service desks
- Link into automated site provisioning process

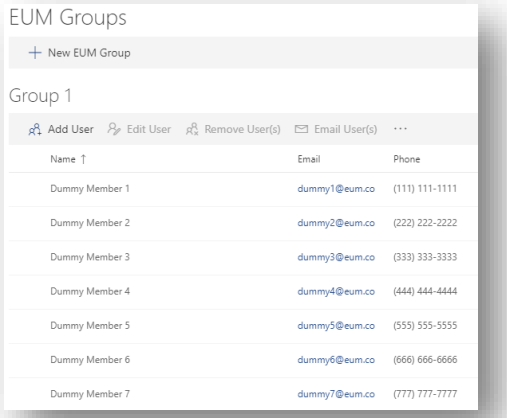
Invitation Only

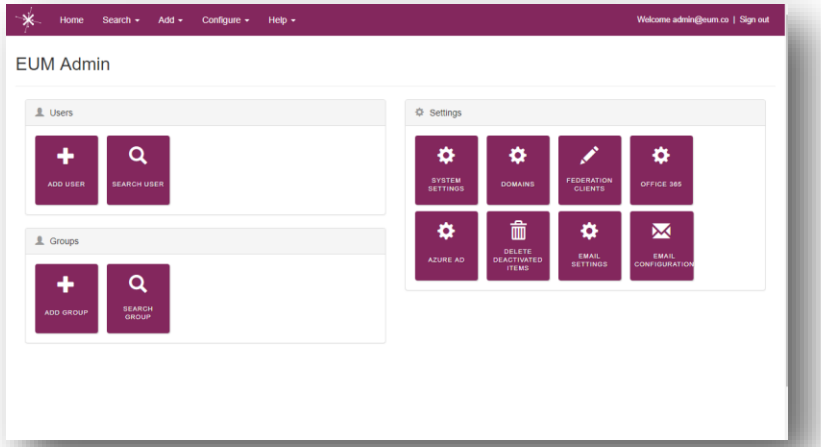


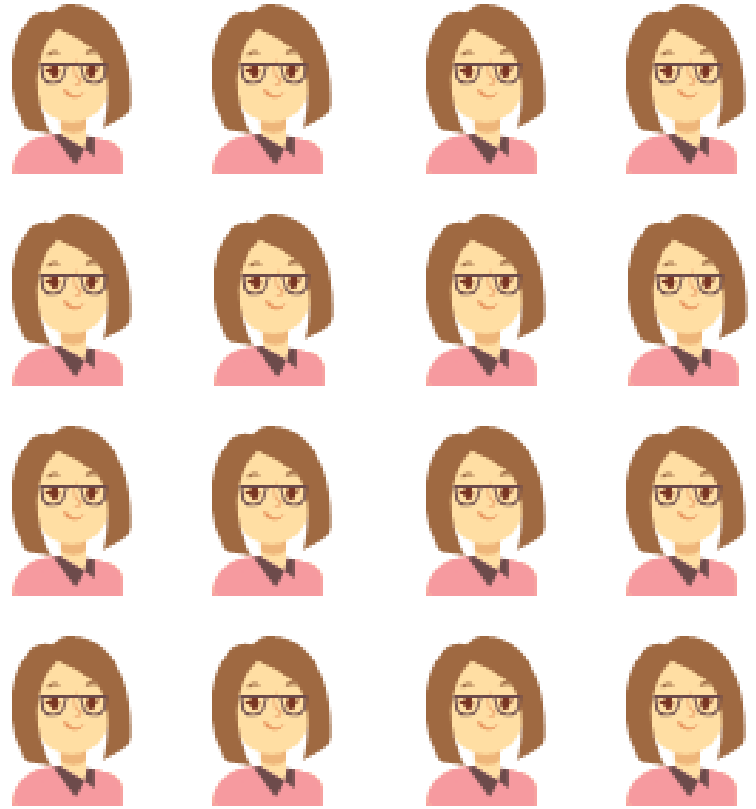




Private Registration







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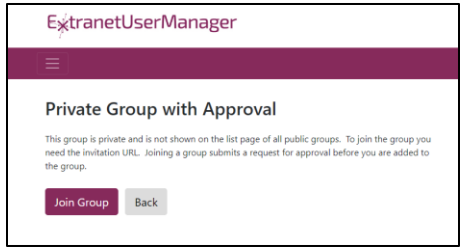

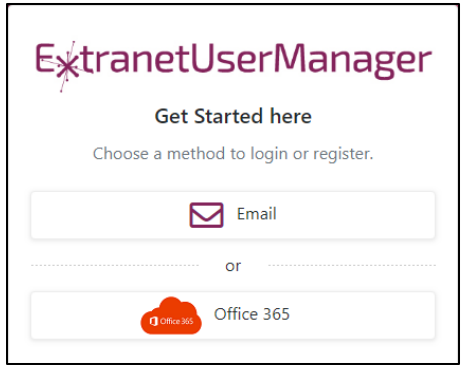

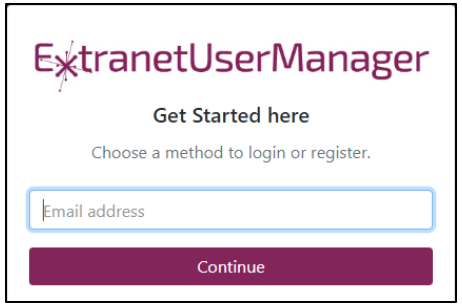

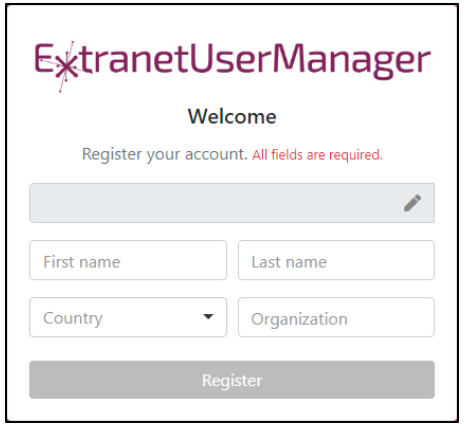

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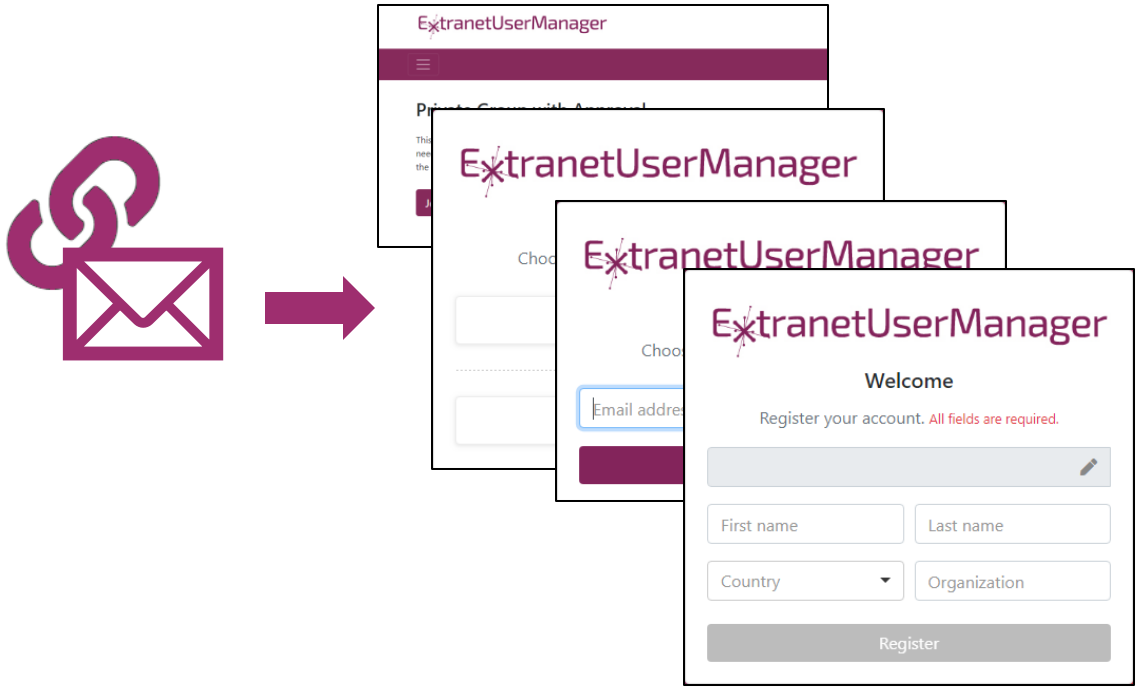
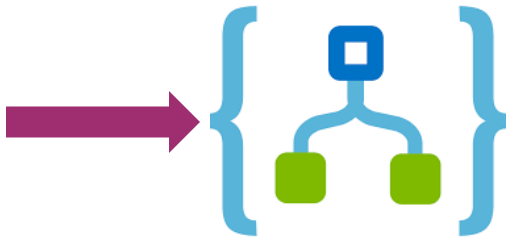
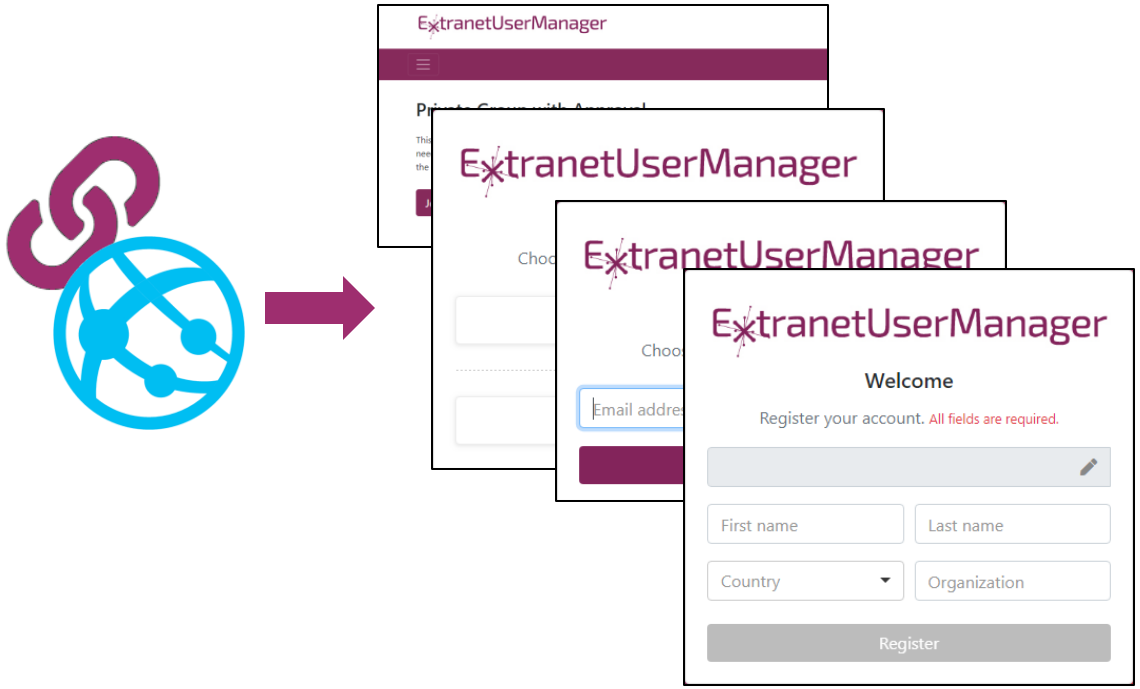
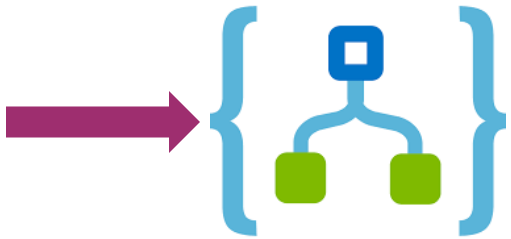




Logic App Workflow

Public Registration





Logic App Workflow

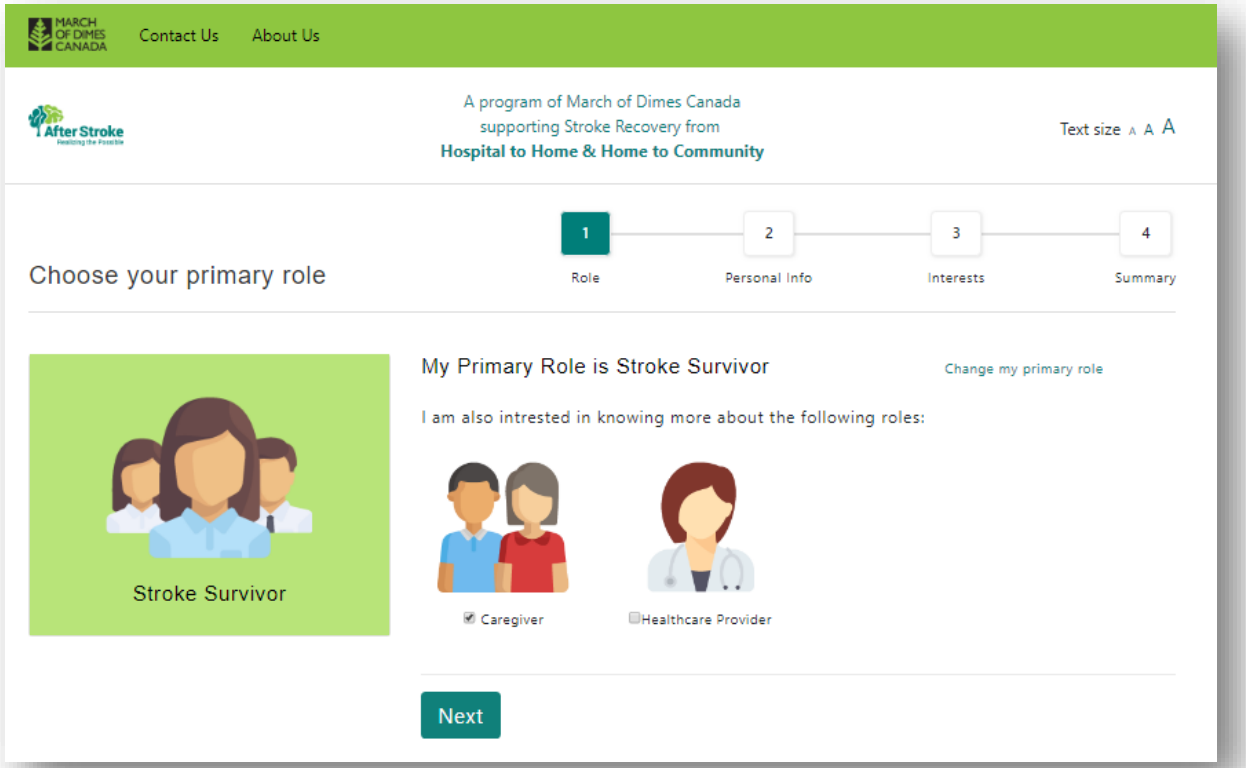
Azure AD P2 Entitlement Management (Preview)

- **Similar to EUM Private and Public Registrations**
- **Supports more sophisticated scenarios through its Access Packages**
  - Assign multiple AAD groups and apps to a user
  - Approval workflows
- **Managed through the Azure Portal**

Customer Case Study:
March of Dimes Canada

The Solution:

- Fully custom registration process tailored to the audience
  - Multi-step profile setup gathers information about the user
  - User experience testing with user groups to optimize
- Initial site launched August 2018
- Feedback was generally positive, but users were confused whether they needed to register or sign in
- Upgraded to EUM simplified login
  - Combines sign in and registration flows



https://afterstroke.marchofdimes.ca

Customer Case Study:
OACAS Member Portal

OACAS is the Ontario Association of Children's Aid Societies

https://oacas.sharepoint.com

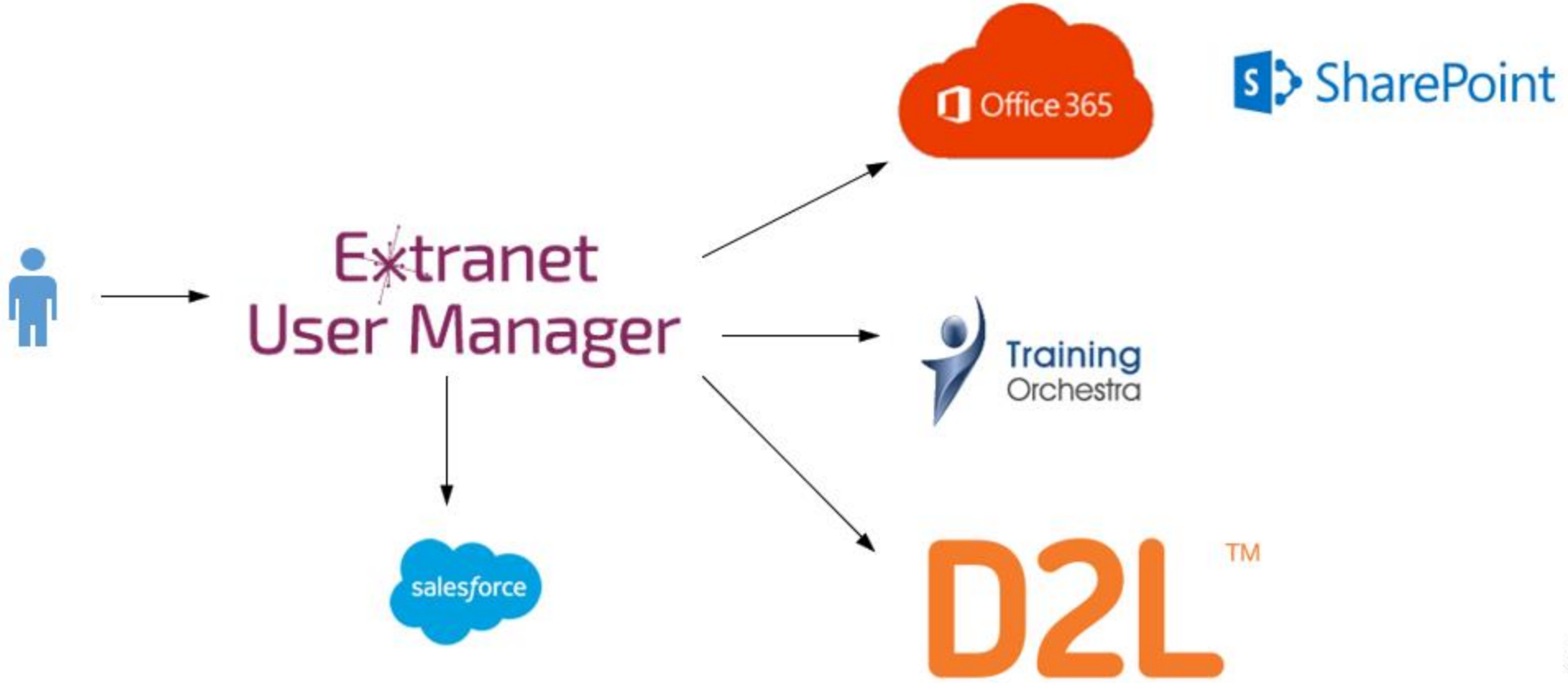
The Challenge:

- 8,000 members across 50+ member organizations
- Provincially funded training resources to be delivered through SharePoint and Desire2Learn

The Results:

- Cloud hosted solution in Office 365 and D2L
- Auto-approval of most accounts on-boarded 500 new users per day at peak
- SSO between Office 365 and D2L
- Responsive design for mobile support
- Licensing provided through Office 365 for Nonprofits

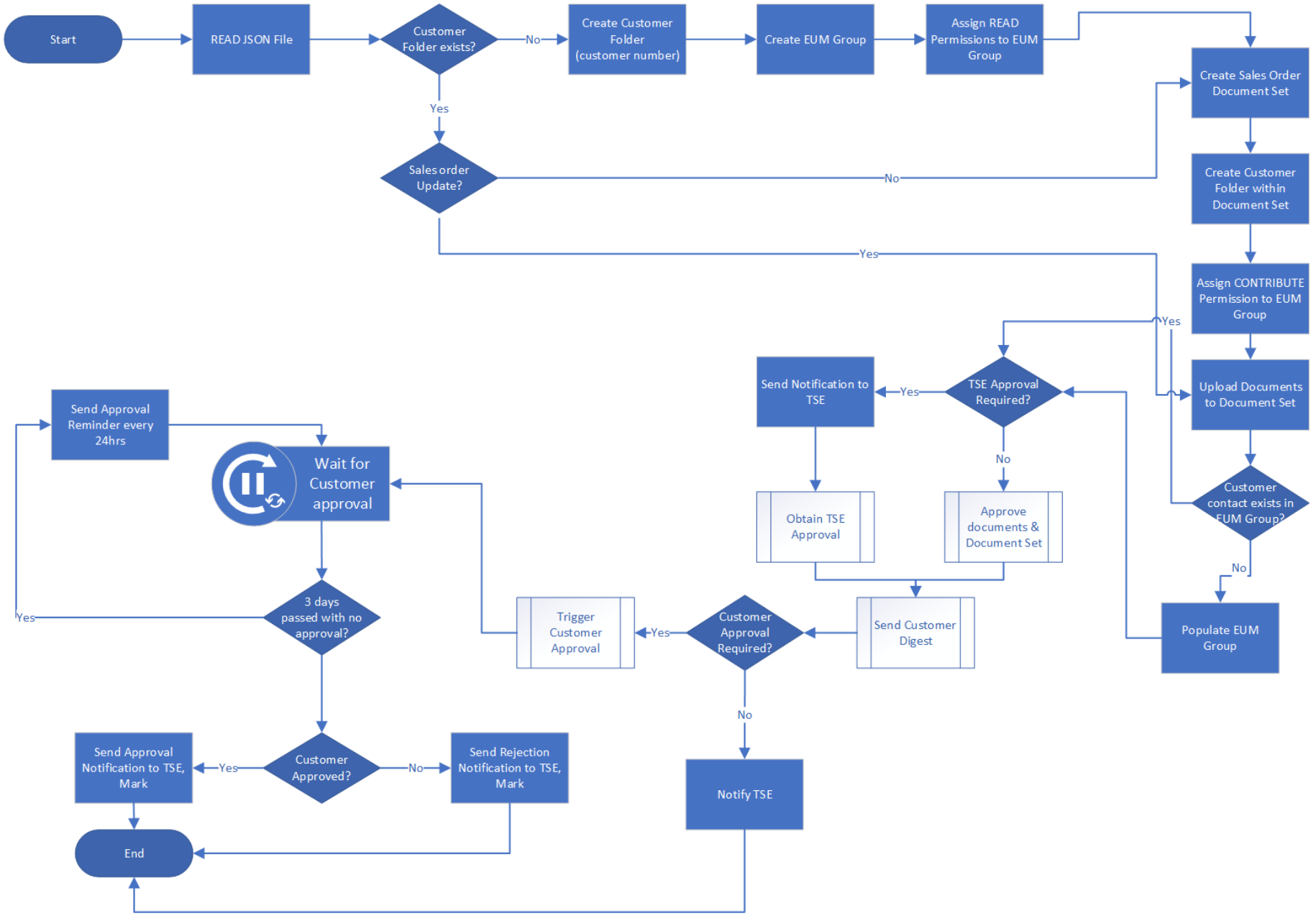
Ontario Association of Children's Aid Societies



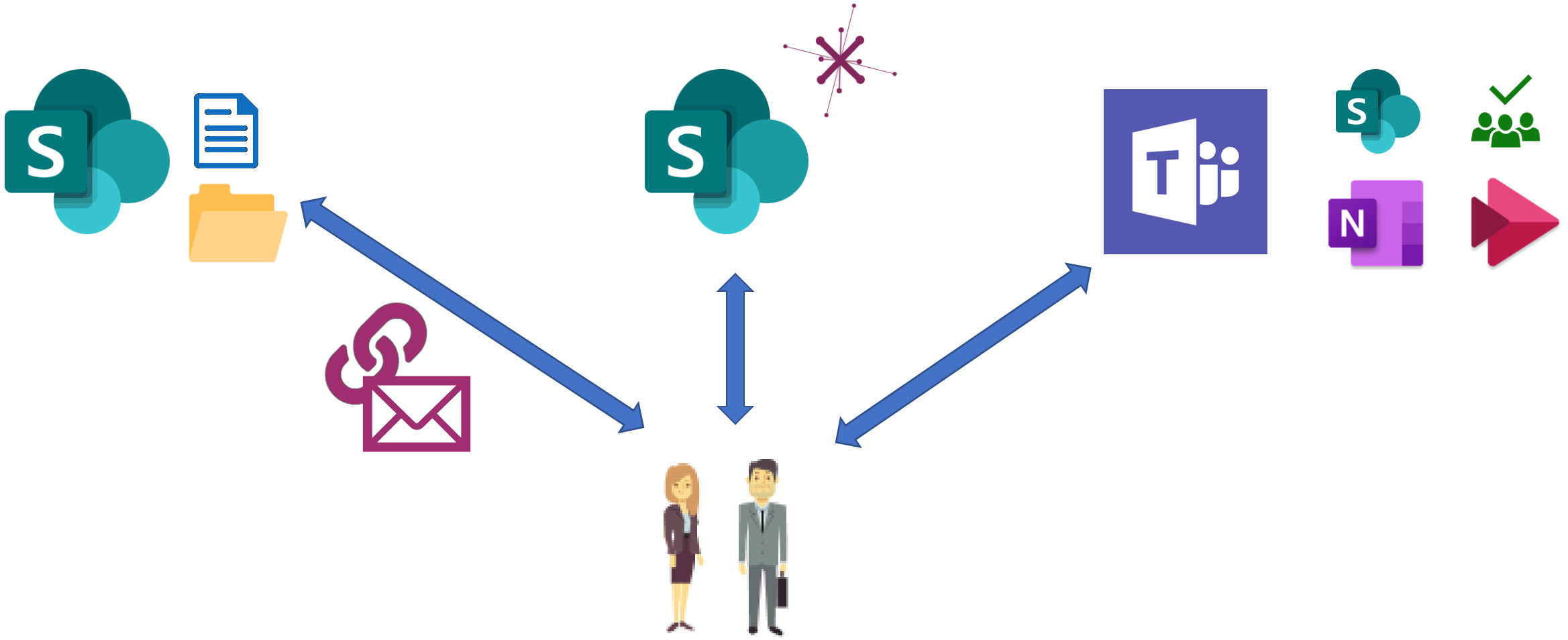
Scenario Three – Engineering Extranet Drawing Approval

- **Extranet for review and approval of engineering drawings**
- **Sales orders managed through SAP**
- **Drawing packages generated programmatically**
- **Zip package deposited in SharePoint library**
- **Documents extracted and approval workflow with external customer is initiated**
- **SAP updated to release sales order when approved**

- **Azure Logic Apps workflow**
- **Premium connectors to Azure Automation**
- **Custom connector to Extranet User Manager**
- **Adaptive Cards used to customize the approval emails**
  - Sent from a Mold-Masters email address
  - Mold-Masters branding


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

Working with External Partners



Upcoming Events

Microsoft Inspire
July 14-18, 2019
Las Vegas, NV

https://partner.microsoft.com/en-us/inspire

Extranet User Manager
Webinar – Unstructured vs. Structured Extranets in Office 365
July 23, 2019
12 pm – 1 pm EST

Eum.co/events

SharePoint Fest Seattle
Christian Buckley & Mark Kashman
PWR103 – Options for Building a Modern Extranet
Wed 1:30 PM - 2:40 pm
Room 606

https://www.sharepointfest.com/Seattle/index.php/sessions

Microsoft Ignite
November 4-8, 2019
Orlando, FL

https://www.microsoft.com/en-us/ignite

Thank you!

Questions?