SharePoint Federation and Extranet Workshop
Unit 3
Customer Case Studies

Presented by Peter Carson
President, Envision IT

June 18, 2014

envision IT
Leaders in SharePoint Solutions

Agenda

Morning Session

- Unit 0 – Introductions
- Unit 1 – Federation
- Unit 2 – Reference Scenarios
- Unit 3 – Customer Case Studies

Afternoon Session

- Unit 4 - Office 365
- Unit 5 – SharePoint On Premises
- Unit 6 – Custom Claims
- Unit 7 – Extranet User Provisioning

User Provisioning Questions

- Who creates the accounts?
- Where do they create them?
- How do users get their credentials?
- What happens when they lose or forget their credentials?

Who Creates the Accounts?

- IT
- Business
- Self-register
- External administrators

Where Do They Create Them?

- Active Directory (AD)
- SQL Server ASPNETDB database
- Social Identities
  - Facebook
  - Linkedin
  - Microsoft Account
  - Google+

How Do Users Get Their Credentials?

- Username and password is emailed
  - Random password with a forced password change
- Communicated through an alternate channel
- Link to set password

Forgotten Password

- Call IT
- Password security challenge questions
- Email a new password
  - Random password with a forced password change
- Second factor password notice
- Link to set a password

Who Creates the Accounts?

- IT ✖
- Business
- Self-register
- External administrators

Business Creating the Accounts

- IT is not going to delegate access to AD directly to the business
  - Not user friendly, and risky
- Tool needed to do the delegation
- Extranet User Manager

Extranet User Manager

Group Owner

Envision IT ExtranetUserManager SharePoint

Home Search Add Configure Help pcclimited\pcarson

Group Details

Group Name: Demo Users

Group Status: Active

Owners: Add Owner

Domain	User	Group	X
Extranet	pcarson1@envisionit365.com		X

Members: Add Member

Member	X
Corey Thokle	X
Corey Thokle	X
Peter Carson 1	X

OK Cancel

© 2007,2013 Envision IT Inc.

Group Owner Rights

Add User

Envision IT ExtranetUserManager SharePoint

Home | Search | Add | Configure | Help | pcclimited\pcarson

Add New User

Details about the user. Note that fields denoted by * are required.

First Name*
Last Name*
Email*
Country: Canada
Street
City
Province
Postal Code

Company
Department
Job Title
Phone
Fax
Cell Phone

Public Profile

☐ I would like to receive the e-Newsletter

Administrator Only

Only users with active accounts will be able to log into the Extranet. Users with Pending Approval or Deactivated status will not be able to log into the Extranet.

Display Name
Status: Active
Username*

Group Membership

Add this user to the required group(s) by selecting the group on the left under Available Groups and clicking the right arrow to move the group name under Assigned Groups. Unmanaged groups displays other groups that this user may be assigned to that you cannot change. This is for informational purposes only.

Available Groups:
Demo Users

--> <--

Assigned Groups:

Unmanaged Groups:
none

Save settings

Welcome Email

Envision IT ExtranetUserManager for SharePoint

Welcome Peter Carson 1,

Welcome to the Envision IT Extranet.

Your username is pcarson1@envisionit365.com.

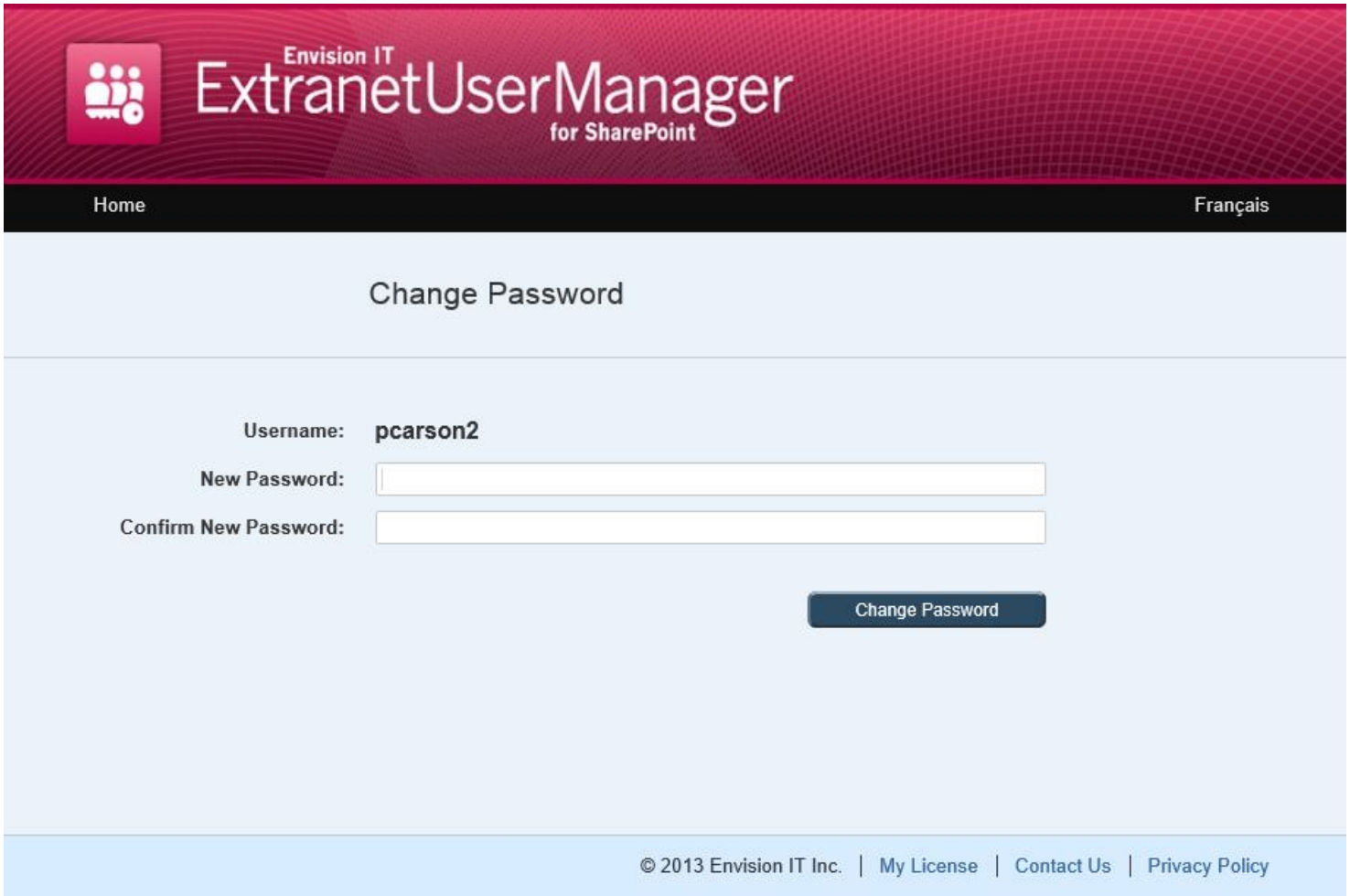
As part of the sign-up process for this site you will be required to Set a Password before **Tuesday April, 22 2014 10:16pm**.

If you have not selected a password by this time you will have to Restart the Password Change Process.

You can access your sites at https://productdemo.envisionit.com.

This e-mail is intended only for the named recipient(s) and may contain information that is privileged or confidential. Any unauthorized use is strictly prohibited. If you have received this e-mail in error, or are not named as a recipient, please immediately notify the sender and destroy all copies of this e-mail.

Set Your Password



Login

Envision IT
ExtranetUserManager
for SharePoint

Home

Login

Welcome to the **Envision IT Extranet User Manager** (with Thinktecture Identity Provider). To enter this area of the site you must be an authenticated user.

If this is your first time visiting, please Register Here before logging in.

Email

Password

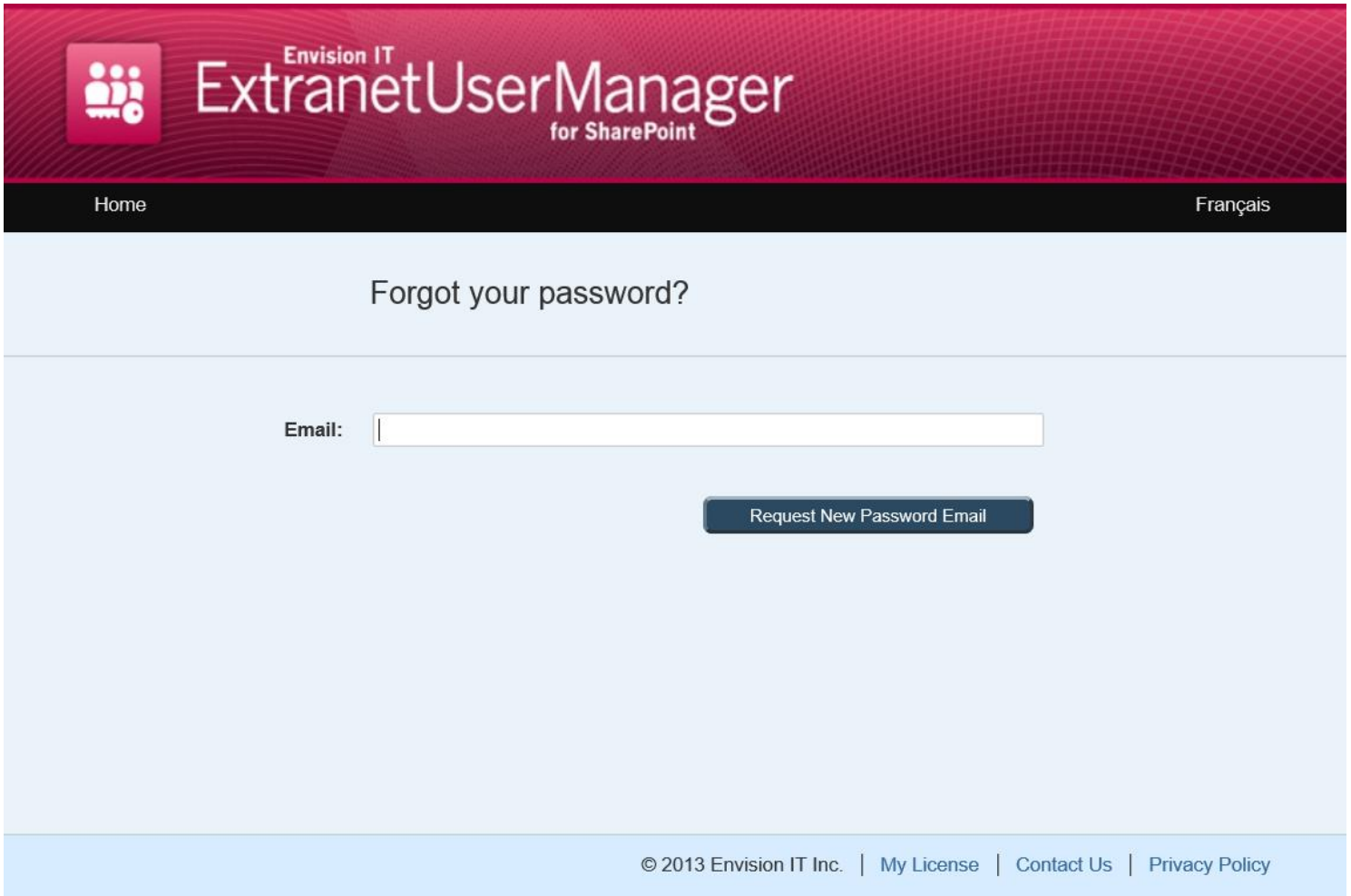
Login

Remember me? ☐

Forgot Password?

© 2014 Envision IT Inc. | Contact Us | Privacy Policy

Forgotten Password



Who Creates the Accounts?

- IT ✗
- Business ✓
- Self-register
- External administrators

ExtranetUserManager
Forgot your password?

ExtranetUserManager
Login

ExtranetUserManager
Registration

ExtranetUserManager
Change Password

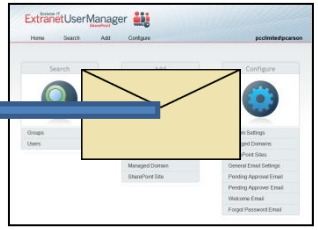
Adventure Works
Home

ExtranetUserManager
Search
Add
Configure

ExtranetUserManager
Forgot your password?

ExtranetUserManager
Login

Adventure Works
Home


ExtranetUserManager

ExtranetUserManager
Registration

ExtranetUserManager
Change Password

ExtranetUserManager
Forgot your password?

ExtranetUserManager
Login

Adventure Works
Home

ExtranetUserManager
Search
Add
Configure

ExtranetUserManager
Registration

ExtranetUserManager
Change Password

ExtranetUserManager
for SharePoint

ExtranetUserManager
for SharePoint
Login

Adventure Works
Home

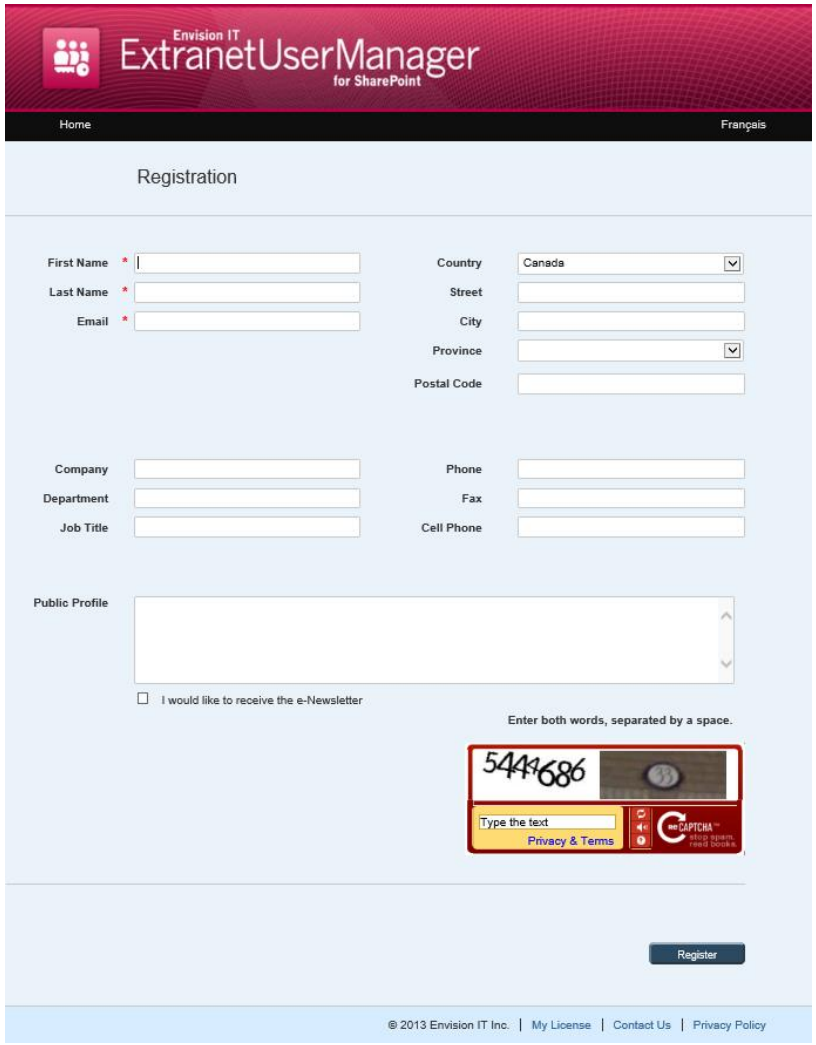
ExtranetUserManager
Search
Add
Configure

ExtranetUserManager
for SharePoint
Registration

ExtranetUserManager
for SharePoint
Change Password

Registration

- Full Visual Studio source code provided
- Fields can be added and removed
- Business logic and external system integration
- Custom approval workflows
- CRM integration
- Layout is also used for the Profile page



United Way
Calgary and Area

Home

Registration

First Name
Last Name
Email
Company
Phone
Role

Reason for Sign-up

Enter both words, separated by a space.

Type the text
Privacy & Terms
reCAPTCHA™ stop spam. read books.

Register

© 2013 United Way Calgary and Area. All rights reserved. | Contact Us | Privacy Policy

G2G MARKET PLACE

Government *helping* Government

An initiative of Oakland County Executive

L. Brooks Patterson

Home

Registration

First Name		Last Name	
Title		Department	
Government Agency		Agency Type	State
Address 1		Address 2	
City		State	Zip
Phone		Email	

Enter both words, separated by a space.

same

Type the text

Privacy & Terms

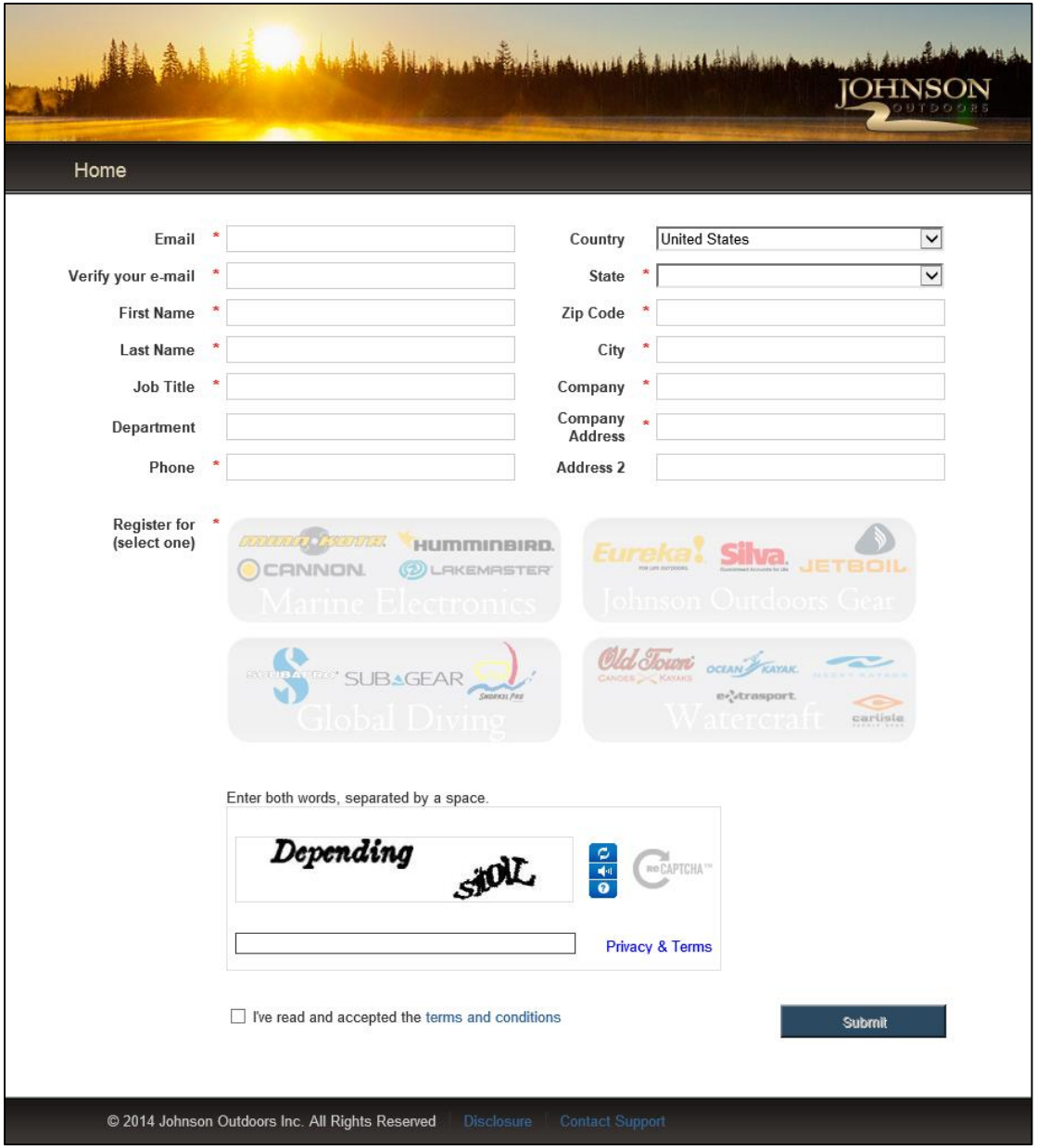
Register

Powered by: G2G Cloud Solution

Privacy Policy | Accessibility

envision IT
Leaders in SharePoint Solutions

Envision IT ExtranetUserManager SharePoint


JOHNSON OUTDOORS
Home
Email *
Verify your e-mail *
First Name *
Last Name *
Job Title *
Department
Phone *
Country
United States
State *
Zip Code *
City *
Company *
Company Address *
Address 2
Register for (select one) *
HUMMINBIRD
CANNON
LAKEMASTER
Marine Electronics
Eureka!
Silva
JETBOIL
Johnson Outdoors Gear
SUBAGEAR
Global Diving
Old Town
OCEAN KAYAK
extrasport
cartisle
Watercraft
Enter both words, separated by a space.
Depending
SIOL
reCAPTCHA
Privacy & Terms
I've read and accepted the terms and conditions
Submit
© 2014 Johnson Outdoors Inc. All Rights Reserved
Disclosure
Contact Support

TRANSAMERICA®
Life Canada

CLOSE X

Registration

› Your contact info | Your relationship with Transamerica | Your communication preferences | Your registration confirmation

Step 1

Please enter your name. This is how we will greet you when you log on to the site.

First Name | Last Name

Your email address will become your username for the site.

Enter your email address | Confirm your email address

The information below will be used to verify your identity when you call us.

Select secret question | Enter an answer

Next

Copyright & Trademarks | Terms of Use | Privacy Policy

Copyright © 2014, Transamerica Life Canada. All rights reserved.

Case Studies

Aéroports de Montréal

AÉROPORTS DE MONTRÉAL

Aéroports de Montréal

- Operate two airports in Quebec
  - Pierre Elliott Trudeau International Airport
  - Montréal–Mirabel
- Trudeau is busiest airport in Quebec, fourth busiest in Canada
- 14.09 million passengers in 2013 and 230,619 movements in 2012
- On an average day, nearly 40,000 passengers transit through Montréal-Trudeau

Aéroports de Montréal

- No self-registration
- Users are setup and added to groups in Extranet AD through the EUM Admin web console by the business
- Security is managed at the group level
- Internal and external users log in with the EUM EZ-Login form
- Simple branding applied to EUM
- Welcome and forgotten password emails

Login

AÉROPORTS DE MONTRÉAL

Départs
Departures

Home | Français

Login

Welcome to Aéroports de Montréal. To enter this area of the site you must be an authenticated user.

User Name

Password

Forgot Password? Login

© 2012 Aéroports de Montréal | Legal Notice | Contact Us

United Way of Calgary and Area

United Way of Calgary and Area

- Gives individuals and families the opportunity to reach their potential and improve their quality of life
- Sample funding programs
  - Teach conflict-resolution skills to a high-risk family
  - Enabling a senior to live independently
  - Helping a high school student stay in school
- United Way's impact is local, tangible, and meaningful
- Area community partnerships in Chestermere, Cochrane, High River, Okotoks, and Strathmore
  - Ensures people in the towns and communities around Calgary have access to the support they need
- www.calgaryunitedway.org

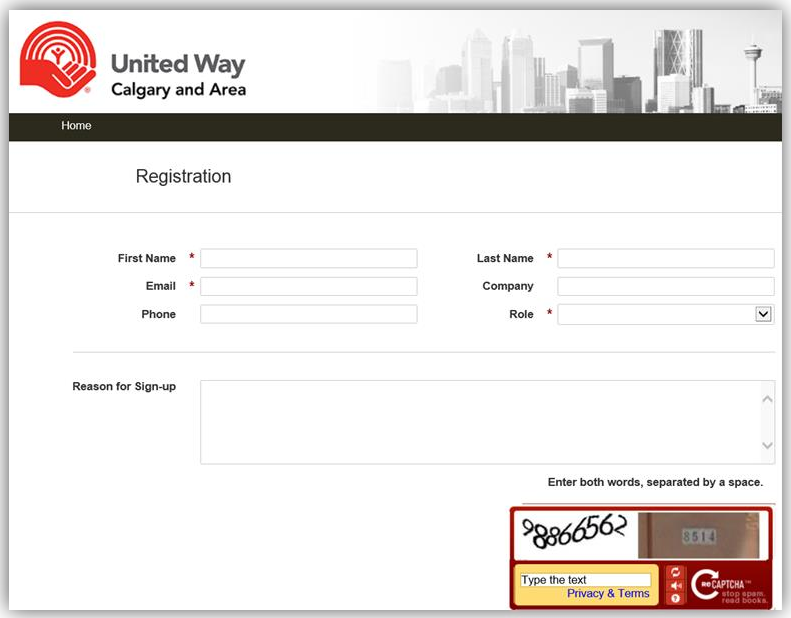
The Challenge

- Looking for an Extranet solution
  - Interact more efficiently with external partners
  - Users to be able to sign up quickly for access to secure resources without placing a large burden on IT
  - Extend the functionality of their SharePoint 2013 site
  - Provide all the necessary tools to create accounts for users outside of their domain
  - Allow those users to view or use specified resources inside of SharePoint

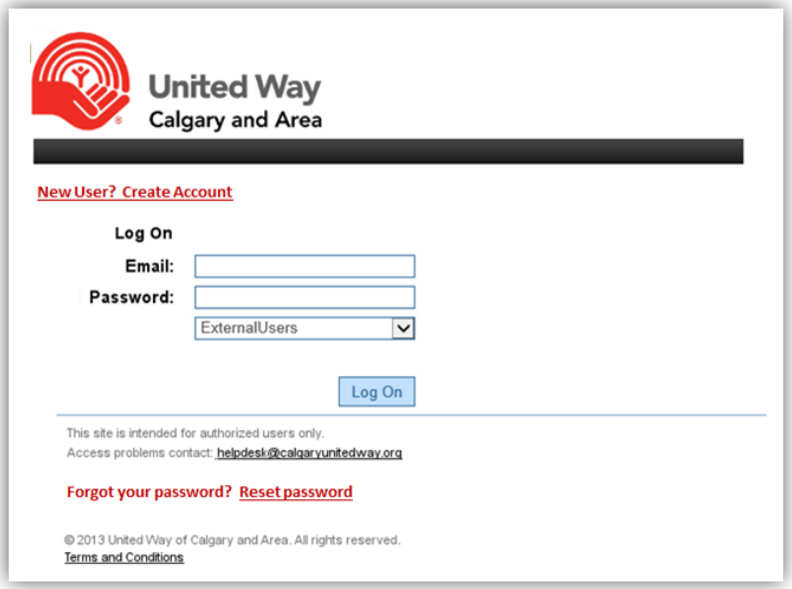
The Envision IT Solution

- Developed a self-service SharePoint 2013 Extranet for United Way of Calgary Area
- Rolled out to board and committee members, campaign coordinators, volunteers, and others outside the organization and across the community
- Envision IT Extranet User Manager for SharePoint integrated and customized
  - New users can self-register through an approval process
  - Login with email address
  - Forgotten password reset
  - Landing page directs users into their sites
  - Designated group owners can directly manage their users
- Allows the United Way to collaborate more effectively with external corporate giving campaigns, community agencies, committees and other stakeholders
- Secure environment with individual permission levels
- Greatly reduces overall reliance on IT within the organization

Registration and Login



https://register.calgaryunitedway.org/register/register.aspx



https://portal.calgaryunitedway.org

Portal

SharePoint

Newsfeed SkyDrive

BROWSE PAGE

United Way Calgary and Area

GenNext Portal EDIT LINKS

GenNext Portal

Home
Shared Documents
Recent
Test
GenNext
GenNext Calendar
GenNext Discussion Board
Chair's Library
Site Contents
EDIT LINKS

Contact List GenNext Shared Documents GenNext Discussion Board Chairs' Home

GenNext Calendar

<	January 2014					>
Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14 Core Team Meeting	15	16	17	18
19	20	21 Career Connector Training	22	23	24	25
26	27	28	29	30	31	1

Shared Documents

new document or drag files here

Name

Core Team Meeting Minutes-December 10 2013

Microsoft Technologies Employed

- SharePoint Server 2013
- SQL Server 2012
- Forefront Unified Access Gateway

Impact of the Program

- Easy for partners to sign-up
- Non-IT staff can manage their access
- Engage more effectively and securely with all kinds of stakeholders across the community
- Effective governance over external collaboration
  - Email or Dropbox are not document management systems

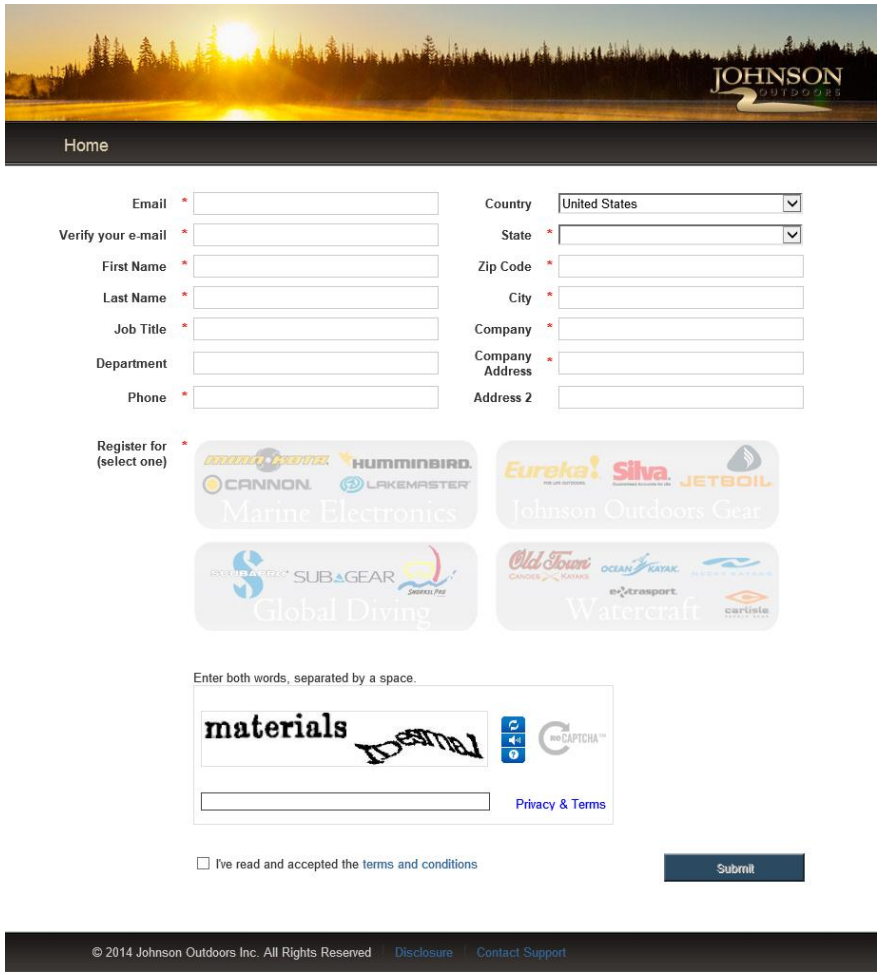
Johnson Outdoors

Johnson Outdoors

- Designs, manufacturers and markets many of the world's best known outdoor recreation brands
- $6 billion family of companies with four categories
  - Marine Electronics
  - Watercraft
  - Outdoor Gear
  - Diving
- Based in Racine, Wisconsin

Registration

- Registration workflow based on the business unit registering for
- Different groups and approvers for each category



Boys and Girls Clubs of Canada

Boys & Girls Clubs of Canada
Clubs Garçons & Filles du Canada

Mission:

To provide a safe, supportive place where children and youth can experience new opportunities, overcome barriers, build positive relationships and develop confidence and skills for life.

Boys and Girls Clubs of Canada

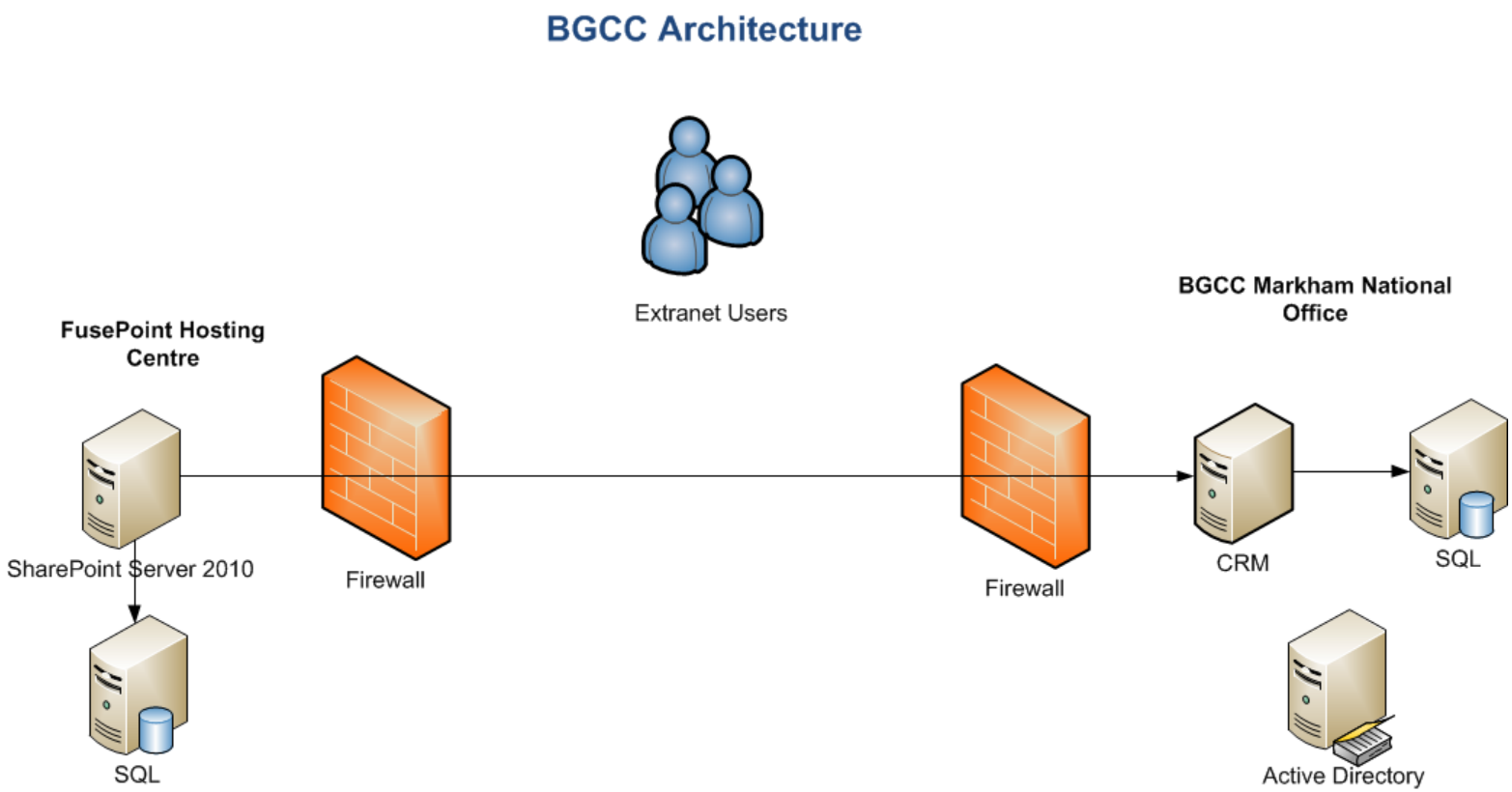
- 104 clubs across the country
- Serving 200,000 children and youth
- Over 700 service locations
- Federated model of governance, not franchise
- Grass roots – response to local needs is key

- Public web site and members Extranet
- Thousands of staff and volunteers
- www.bgccan.com

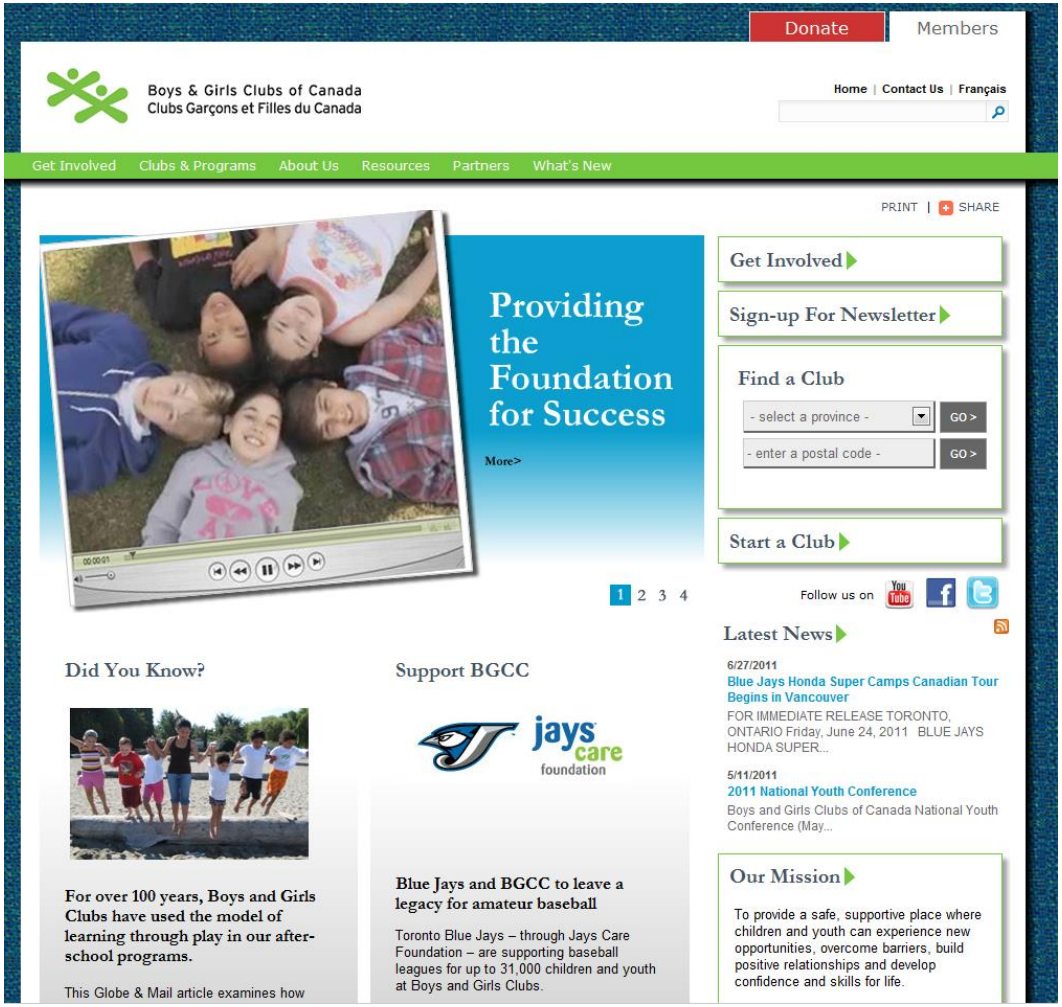
Business Objectives

- Increase public awareness
- Increase donations
- Leverage investment in MS Dynamics CRM
- Increase engagement of staff and volunteers
- Integrated portal for the “business” of the association
- One CMS for all levels of service – public, members, staff, volunteers, supporters

Infrastructure



Public Home Page

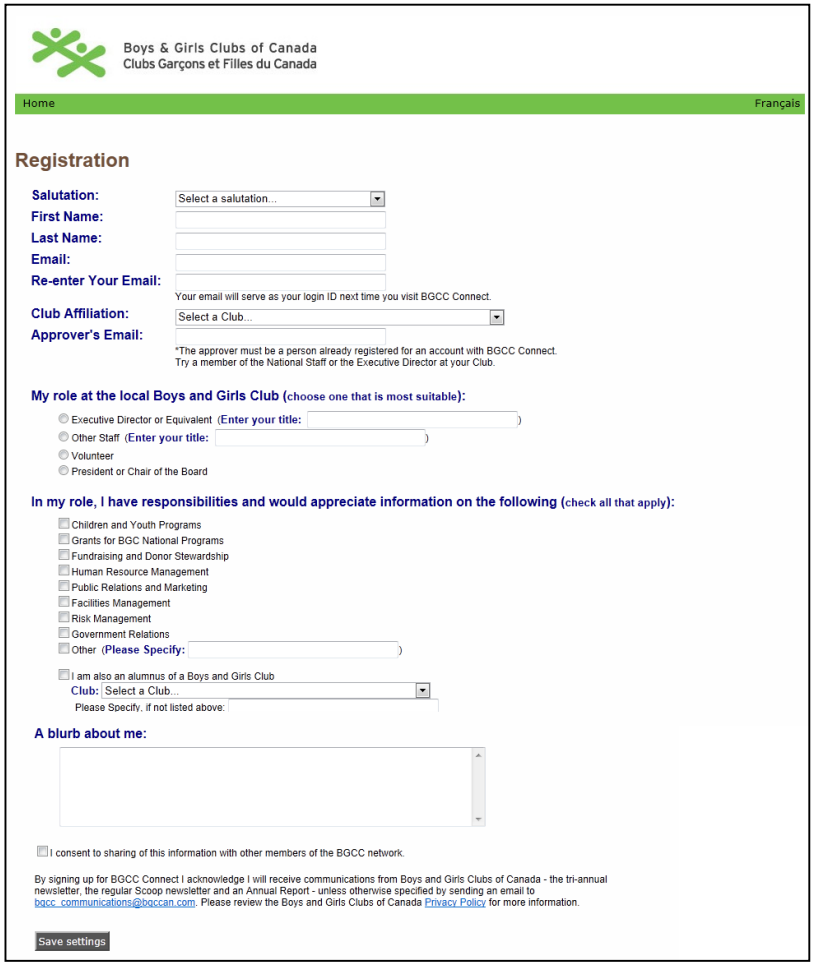


Login

Boys & Girls Clubs of Canada
Clubs Garçons et Filles du Canada
Home
Français
Welcome to BGCC Connect, the Members Portal of the BGCC website. To enter this area of the site you must be a staff, volunteer, partner, affiliate or supplier of Boys and Girls Clubs of Canada. If you fall within one of these groups, please login now.
If this is your first time visiting BGCC Connect, please Register Here before logging in.
Login
Email :
Password :
Login
I forgot my password.
©2010 Boys and Girls Clubs of Canada | Contact Us | Privacy | FAQs

Registration

- Self registration
- Describe your relationship to the club
- Name your own approver
  - If you know someone with access, they can grant you access
- Creates account and also updates CRM



Boys & Girls Clubs of Canada
Clubs Garçons et Filles du Canada

Home | Français

Registration

Salutation: Select a salutation...
First Name:
Last Name:
Email:
Re-enter Your Email:
Your email will serve as your login ID next time you visit BGCC Connect.
Club Affiliation: Select a Club...
Approver's Email:
*The approver must be a person already registered for an account with BGCC Connect.
Try a member of the National Staff or the Executive Director at your Club.

My role at the local Boys and Girls Club (choose one that is most suitable):
- Executive Director or Equivalent (**Enter your title:**)
- Other Staff (**Enter your title:**)
- Volunteer
- President or Chair of the Board

In my role, I have responsibilities and would appreciate information on the following (check all that apply):
- Children and Youth Programs
- Grants for BGC National Programs
- Fundraising and Donor Stewardship
- Human Resource Management
- Public Relations and Marketing
- Facilities Management
- Risk Management
- Government Relations
- Other (**Please Specify:**)

I am also an alumnus of a Boys and Girls Club
Club: Select a Club...
Please Specify, if not listed above:

A blurb about me:

I consent to sharing of this information with other members of the BGCC network.

By signing up for BGCC Connect I acknowledge I will receive communications from Boys and Girls Clubs of Canada - the tri-annual newsletter, the regular Scoop newsletter and an Annual Report - unless otherwise specified by sending an email to bgcc_communications@bgccan.com. Please review the Boys and Girls Clubs of Canada Privacy Policy for more information.

Save settings

Dynamics CRM Integration

Save and Close | Send E-mail | Follow Up | Reports | Run Workflow... | Address Lookup | Outlook Email | Actions | Help

Contact: Peter Carson

Information

Details:
- Information
- More Addresses
- Activities
- History
- Sub-Contacts
- Relationships
- Workflows
- Cheques Logged
- Pledges
- Grants/Schol.
- Committees
- Recognitions/Awards
- Organisations
- Donations
- Testimonials
- Events/Meetings
- Advocacy Issues

Sales:
- Opportunities
- Quotes
- CRMOrders
- Invoices

Service:
- Issues
- Contracts

Marketing:
- Distribution Lists
- Campaigns & Events

General | Address | Details | Administration | Notes

Salutation *	Mr.		
First name *	Peter	Employer	
Middle name		Club Affiliation	
Last name *	Carson	Business phone	
Suffix		Toll free	
Job title		Home phone	
Department		Cell phone	
First Contact Date with BGCC		Fax	
E-mail (primary)	peter@envisionit.com	**Date last verified**	
E-mail (other)			
Twitter			

Contact Role Categories

Staff/Volunteer	☐	Donor	☑	Other	☐

Donor Roles

President's Club	☐	Anonymous Donor	☐	Other	☐

Communications Preferences

Bilingual (indicate preference)	☐	English	☑	French	☐
Preferred method of communication +	Any				

Subscriptions

Include in Annual Report mailout	☐	Holiday Solicitation	☐	Include in Newsletter mail-outs	☐
Include in Annual Report Email	☑			Include in Newsletter Email	☑
Holiday Greeting	☐			Scoop	☐

Status: Active

Public Health Ontario

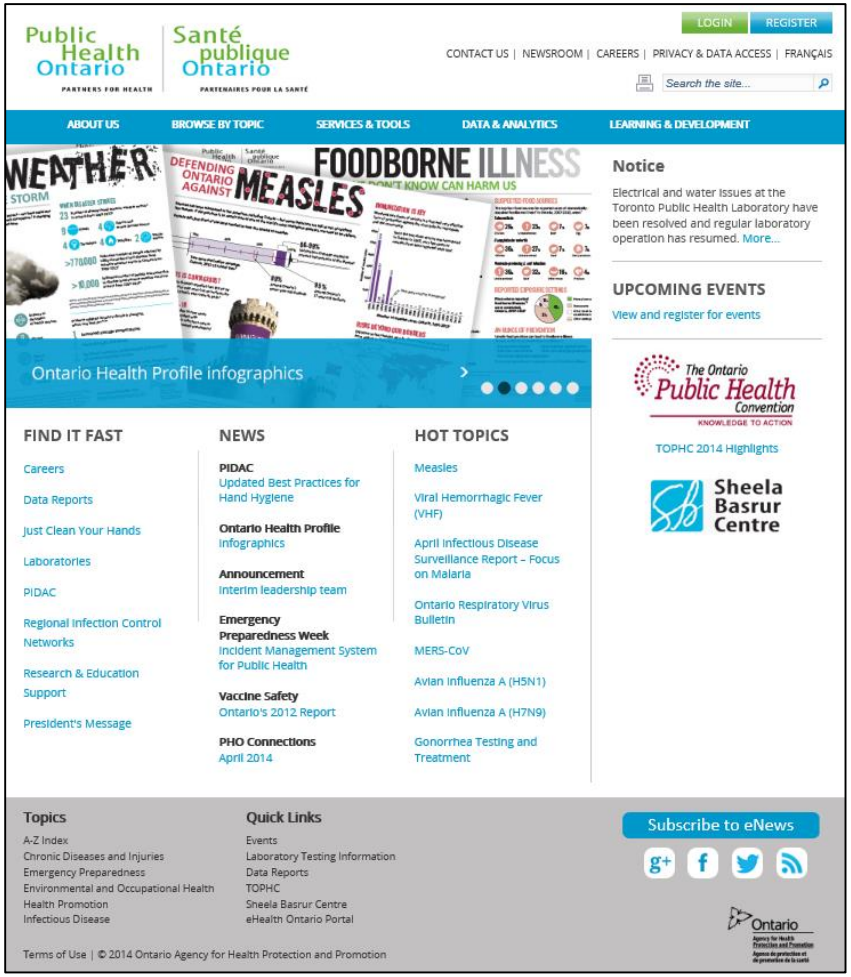
- Crown corporation dedicated to protecting and promoting the health of all Ontarians and reducing inequities in health
- Links public health practitioners, front-line health workers and researchers to the best scientific intelligence and knowledge from around the world
- Operates the public health laboratories
- Main clients are local public health units, government and health care providers and institutions.

Public Health Ontario
PARTNERS FOR HEALTH

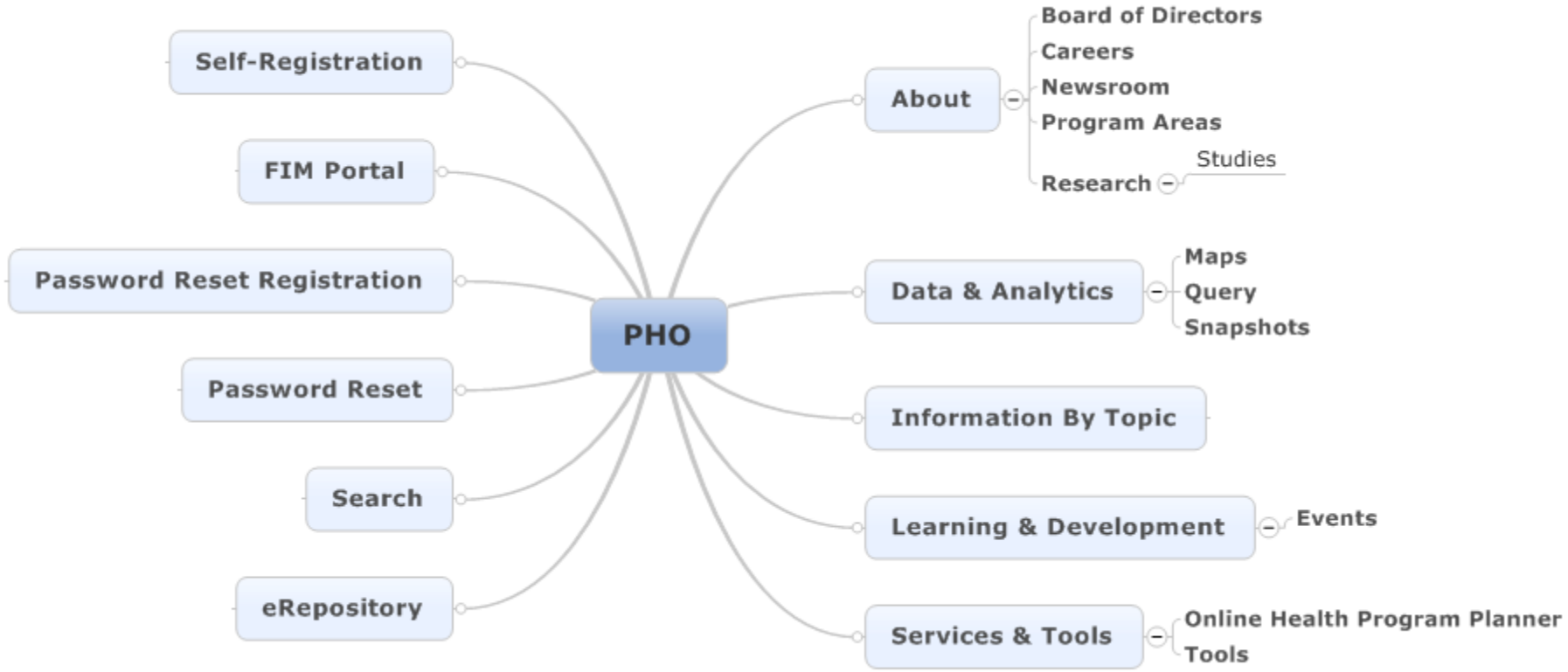
Santé publique Ontario
PARTENAIRES POUR LA SANTÉ

Public Health Ontario

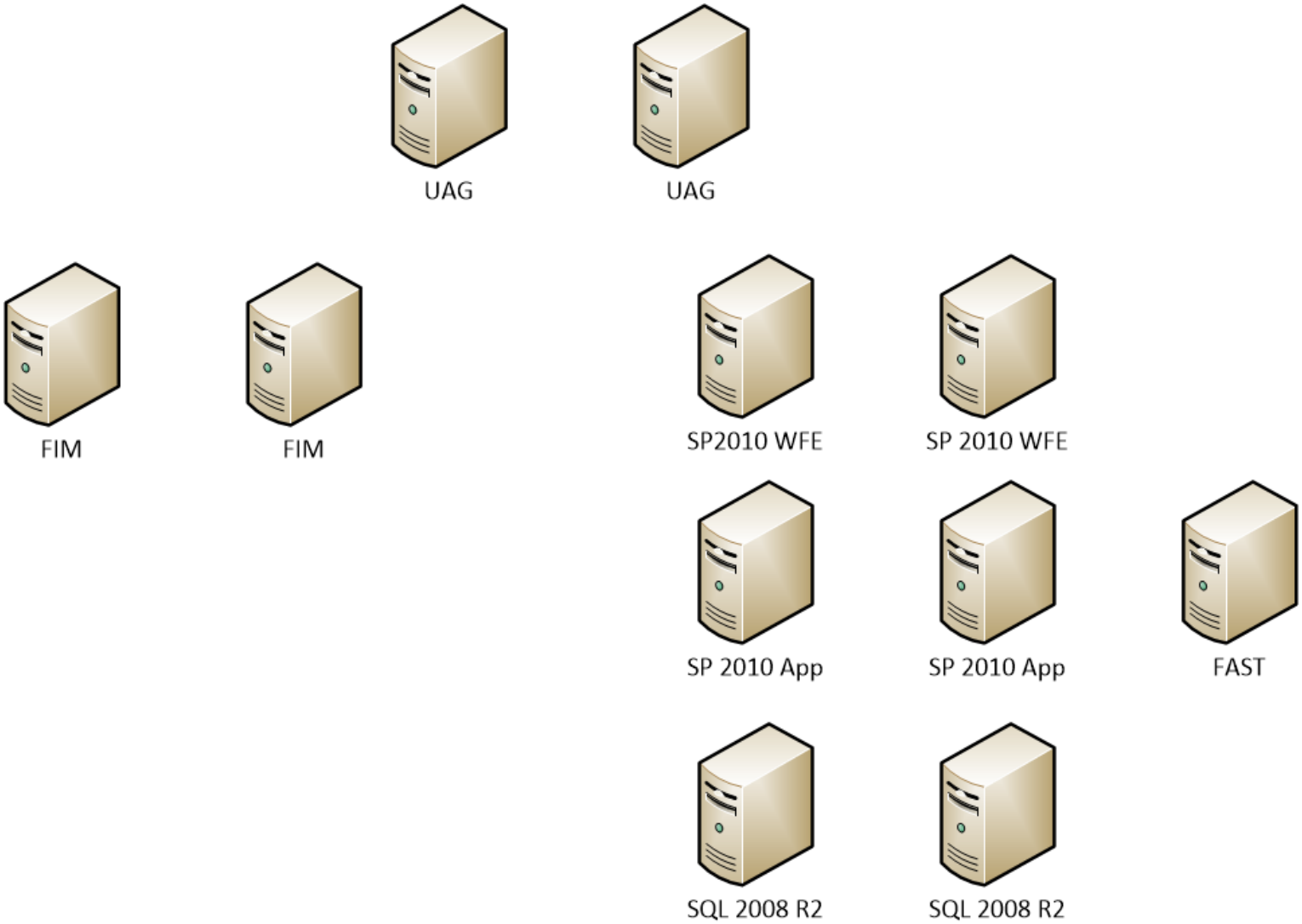
- Public web site hosted on SharePoint 2010
- Leverages Forefront FIM and UAG, and FAST Search
- EUM used for registration, profile, and forgotten password reset



Site Overview

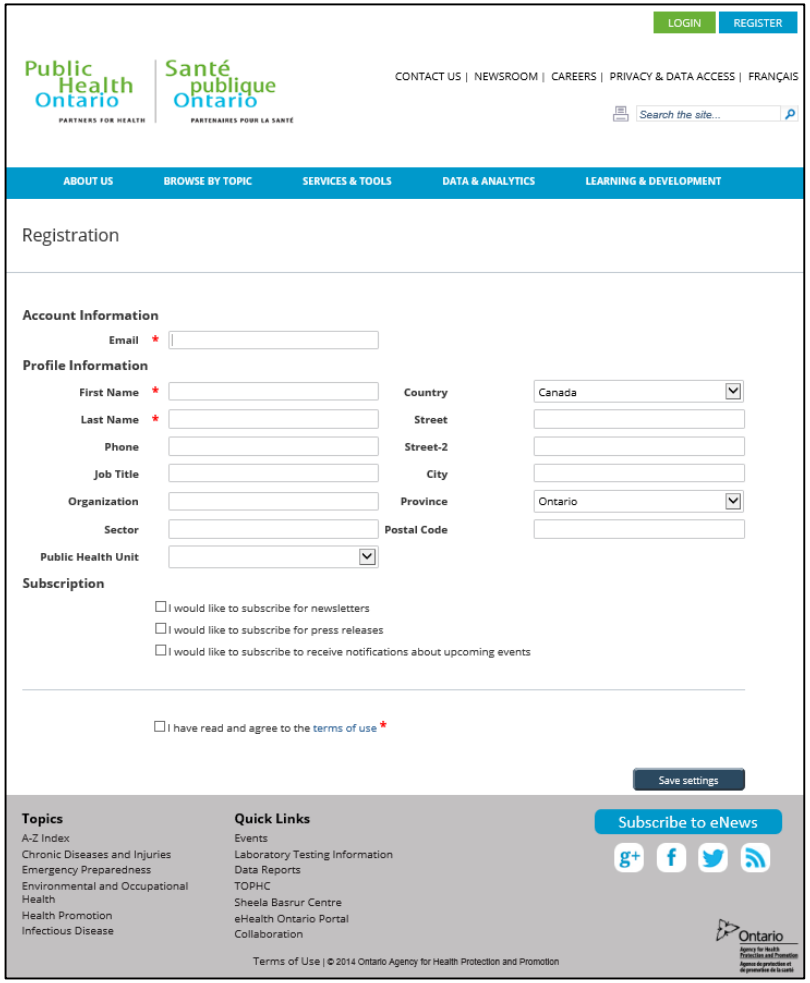


PHO Infrastructure



Registration

- Anyone can register an account for Level 1 access
  - No approval process
  - No additional content provided
- Level 2 is for Public Health Unit staff
  - Approval workflow directs to the appropriate Public Health Unit outside of the PHO
  - FIM manages the approval process



Log On

- Customized UAG login page
- Login with email address
- Register and forgotten password links
- Branded

TMX Group

- Toronto Stock Exchange
  - Largest stock exchange in Canada, the third largest in North America and the seventh largest in the world
  - World leader in the mining and oil and gas sector
  - As of March 2014, TSX had 1515 listed companies with a combined market capitalization of CAD $2,457 billion
- TSX Venture Exchange
  - Public venture capital marketplace for emerging companies
  - As of March 2014, TSXV had 2109 listed companies with a combined market capitalization of CAD $37 billion
- Numerous other holdings, products, and services

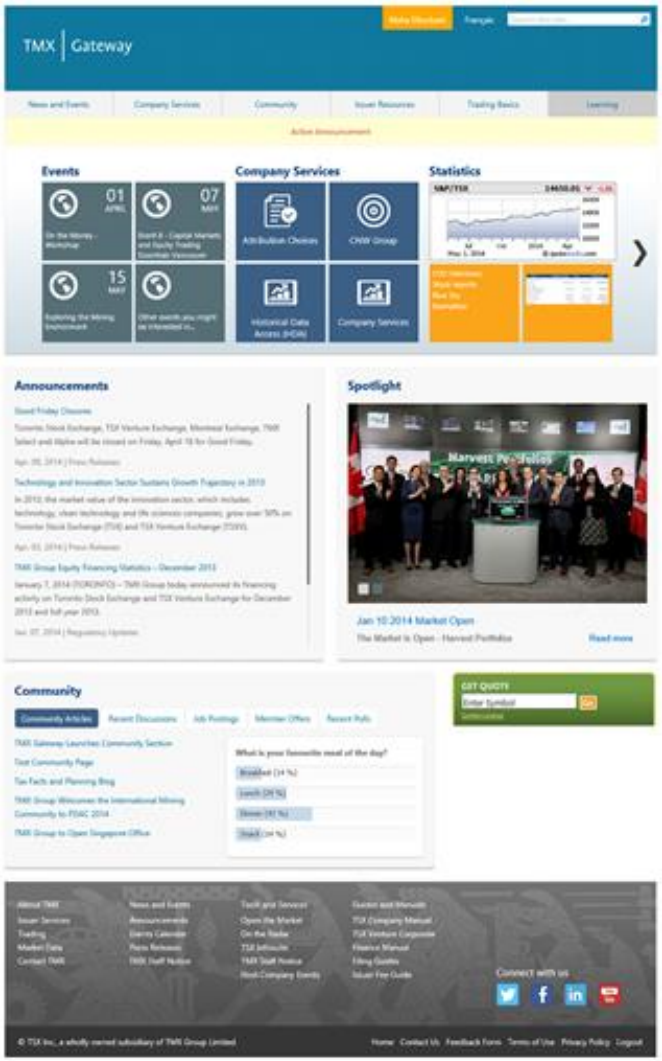
Issuer Portal

- Authenticated, targeted portal
- Multi-way conversations
- Product offerings, events, postings
- Internal and external forms
- English and French
- Agile project methodology
- Launch target of Q4 2014

"I Envision the issuer portal becoming the main point of contact with TMX, making it easier to do business with us, building engagement and stickiness with our clients, and creating a community for our staff, clients, and third parties."

Based on conversations with Loui Anastasopoulos and the TMX team

Issuer Portal



Technology Background

- Portal being built on SharePoint 2010
- Users are both internal and external
  - TMX staff
  - TSX and TSX Venture listed companies
  - Advisors, consultants, etc.
- User registration and approval managed through Forefront Identity Manager
- Forms-based login against the Extranet Active Directory
- Custom claims provider integrates LOB data with security model
  - Company, role, exchange, sector

Supreme Court of Victoria

- Supreme Court for the State of Victoria
- Located in Melbourne, Australia
- Case management system
  - RedCrest is the program name
  - Pilot program for the Commercial Case court
  - 8,500 cases filed each year
- www.zdnet.com/victorian-supreme-court-gets-cloud-for-case-management-7000019941/

RedCrest

- Barristors and solicitors can create their own accounts
- Case initiation process to collect case information and fees
- SharePoint case site created for each case
- Other parties (defendants and plaintiffs) can join the case
- Judges have their own private secure area

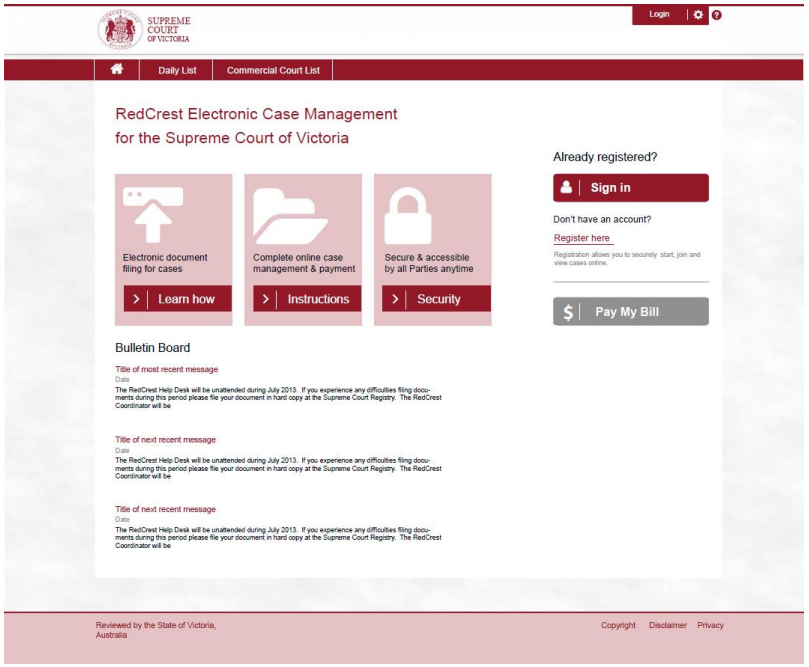
Project Evolution

- Initial development done on Office 365 and Azure
- Heavy leveraging of custom-built provider hosted SharePoint Apps
- Production build is happening in SharePoint 2013 at Rackspace in Melbourne
- Go live date is June 30, 2014

- User management is provided through the Extranet User Manager
- Barristers and solicitors can self-register
- Login with their email address and password
- Forgotten password reset
- Profile management
- www.envisionit.com/eum

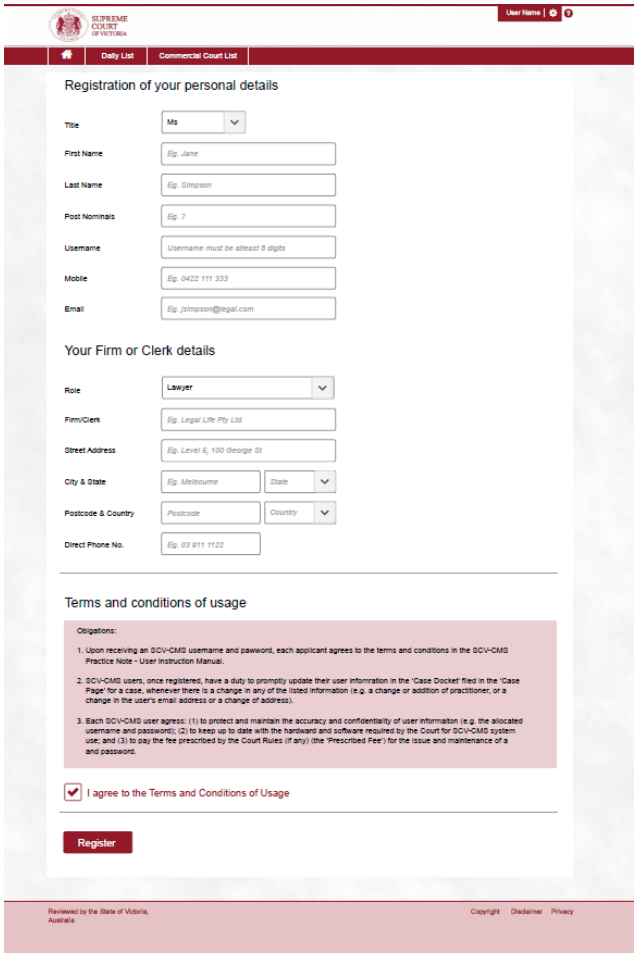
Public Site

- Anonymous content available to the public about the program
- News bulletins and general information
- Links to sign up for an account and login
- Staging hosted on Office 365 at http://redcreststage-public.sharepoint.com/



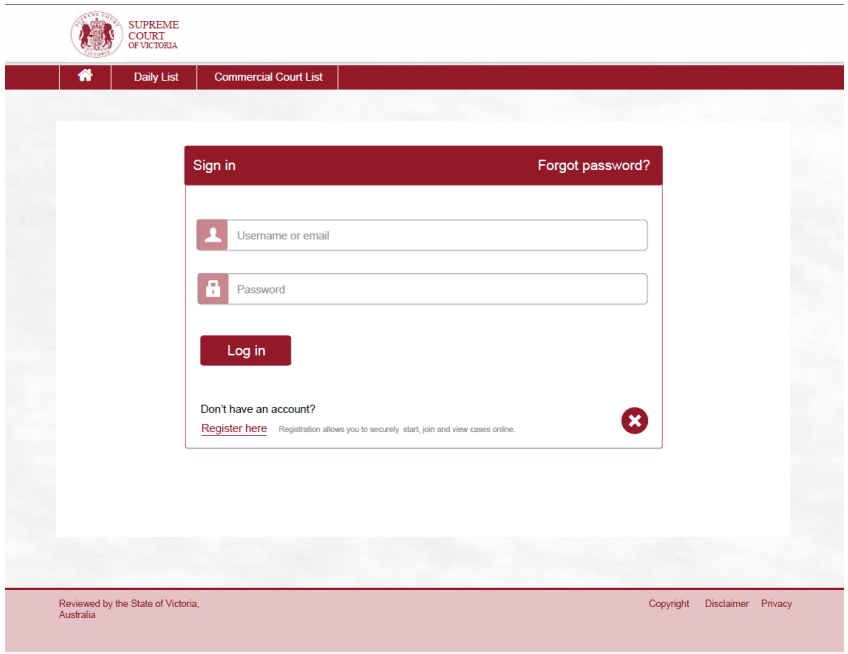
Registration

- Extranet User Manager supports customized registration forms
- Mandatory and optional fields as specified by the court
- Welcome email provides a secure token to set your password



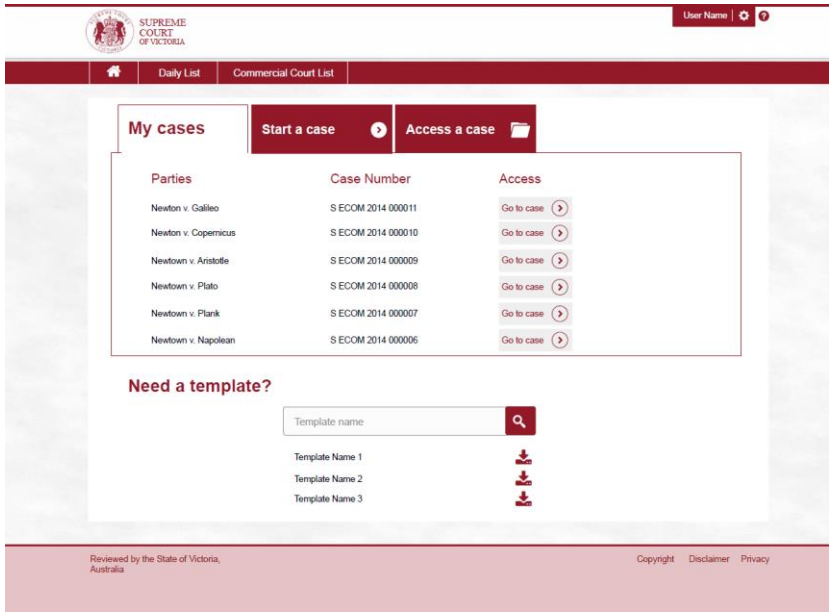
Login

- Federation done using customized Thinktecture Identity Server
- Allows a fully branded, customized login experience, federated to Office 365
- Staging hosted in Azure



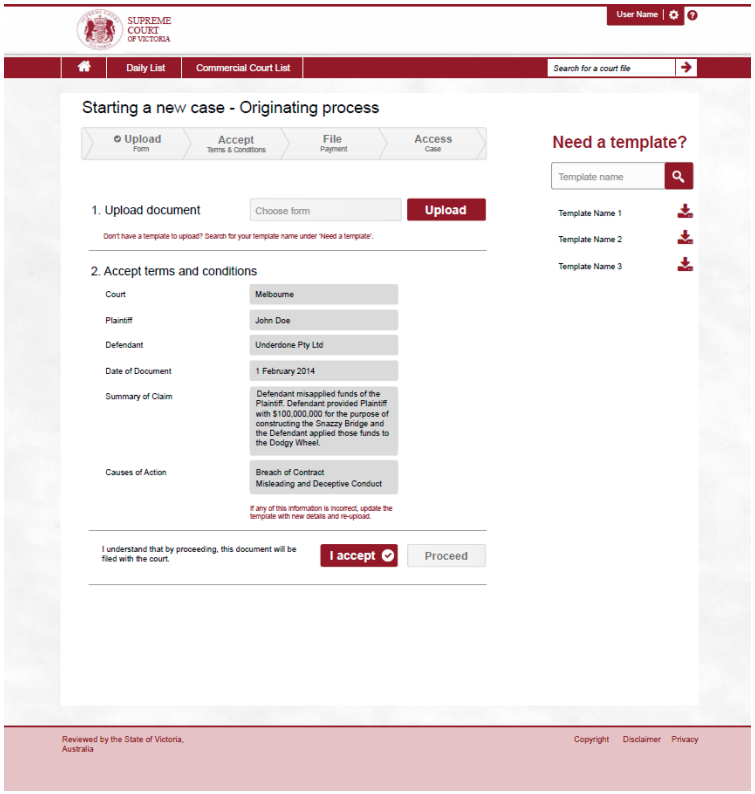
My Cases

- Lists all cases you are a party to
- SQL database stores the case information
- SharePoint App queries and renders the cases



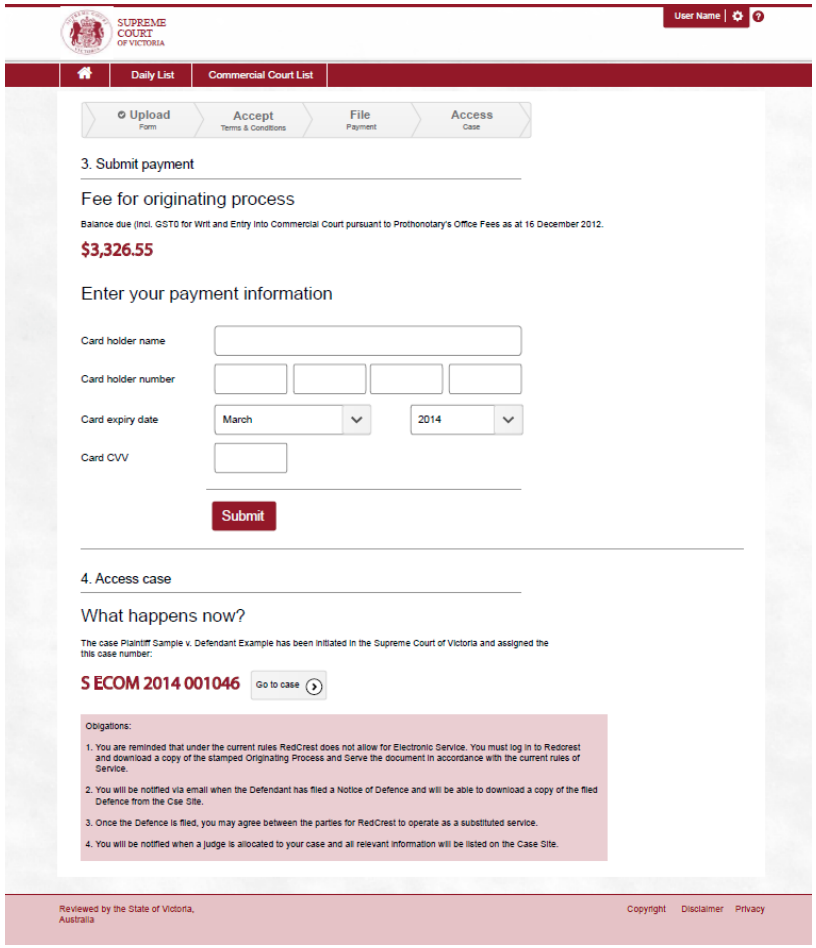
Starting a Case

- Word template is downloaded and filled in
- Document is uploaded
  - Parsed by Aspose (third party .NET tool)
  - Case site created
  - Database updated
  - Document is sealed (watermarked) and stored as a record in case site



Payment Gateway

- Fee for case is collected through eWAY payment gateway



Other System Components

- Requesting and granting access
- Notice of Appearance, Defense and Counterclaim processes
- Assignment of judges
- Trial scheduling
- Additional records management
- Legacy system integration
- Records search
- Reporting

Business Challenge

- Existing processes are entirely paper based
- Court mandate is to be paperless by 2016
- Previous attempts have not been successful
- This is the first section of the court to move forward

Business Impact

- 7x24 access to initiate and access cases
- Streamlining of current paper process
- Reduced administrative costs both on the court's side and the law firms
- Improved visibility and findability of court documents

Before and After

Before

- Paper process
- Submissions have to be done at the court registry office
- No visibility into the process
- Massive amounts of paper moving between parties

After

- Paperless process
- Submissions can be done from anywhere through the Internet
- Always up to date status on the case
- No more paper moving