Office 365 External Sharing Webinar

November 7, 2017
Introductions
Peter Carson

- President, Extranet User Manager and Envision IT
- SharePoint MVP
- Partner Seller, Microsoft Canada
- peter.carson@extranetusermanager.com
- http://blog.petercarson.ca
- www.extranetusermanager.com
- Twitter @carsonpeter
- VP Toronto SharePoint User Group
Leadership Team

Peter Carson
CEO & Founder

Denesh Sohan
Director Operations

Logan Guest
Sales Associate

Deborah Wynne
Director Finance/Admin

Amanda Da Costa
Marketing Associate

ExtranetUserManager

http://eum.co
Agenda

- Introductions
- Extranet Considerations
- Office 365 External Sharing OOTB
- Administering External Sharing
- Office 365 Groups
- Demo and Customer Scenarios
- Wrap Up and Q&A
Five Considerations for your Extranet

1. Who will be accessing the extranet?

- Members
- Customers
- Vendors
- Suppliers
- Volunteers

- Board of Directors
- Citizens
- Researchers
- Tenants
- Partners
Five Considerations for your Extranet

1. Who will be accessing the extranet?

2. Self-registration option or invitation only?

**Invitation Only**
- Smaller, known set of users
- Managed centrally or delegated

**Self Registration**
- Onboarding hundreds or thousands of external users
- Approval workflows
- Auto-approvals
- Delegation
Five Considerations for your Extranet

1. Who will be accessing the extranet?
2. Self-registration option or invitation only?
3. How will your extranet users authenticate?

- Email and password
  - Self-service password reset
- Office 365 / Azure AD
- Microsoft Account
- Google
- Facebook
- LinkedIn
- Twitter
Five Considerations for your Extranet

1. Who will be accessing the extranet?
2. Self-registration option or invitation only?
3. How will your extranet users authenticate?
4. **What interactions are your external users going to have?**
   - Accessing published content
   - Collaborating on specific documents
   - Accessing team or project sites
   - Becoming full-fledged members of Office 365 Groups
Five Considerations for your Extranet

1. Who will be accessing the extranet?
2. Self-registration option or invitation only?
3. How will your extranet users authenticate?
4. What interactions are your external users going to have?
5. What applications will be accessible?

- Office 365 - SharePoint Online, OneDrive for Business
- Office 365 Groups – Teams, Planner, Yammer
- Other Office 365 Apps - Power BI, Stream, PowerApps, Flow
- SharePoint On Premises
- Third Party SaaS Applications
- Custom Applications – On Premise or Cloud
1. Who will be accessing the extranet?

2. Self-registration option or invitation only?

3. How will your extranet users authenticate?

4. What interactions are your external users going to have?

5. What applications will be accessible?

<table>
<thead>
<tr>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any type of external user</td>
</tr>
<tr>
<td>Invitation only</td>
</tr>
<tr>
<td>Office 365 / Azure AD, Microsoft Account</td>
</tr>
<tr>
<td>Any interactions</td>
</tr>
<tr>
<td>Office 365 only</td>
</tr>
</tbody>
</table>
Microsoft Ignite 2017

- https://myignite.microsoft.com/videos
- 851 session on demand
- PowerPoint decks available
Enable external sharing and collaboration with OneDrive and SharePoint

Eugene Lin
Principal Program Manager – OneDrive and SharePoint

Rafael Lopez-Uricoechea
Program Manager 2 – OneDrive and SharePoint

https://myignite.microsoft.com/sessions/53864
Scenario: simple external sharing
I’m sending sales materials to a customer

Share it with whomever you want

Make it **easy** for them
Don’t make them sign-in
Don’t make them create an account
Let them forward it to whoever they want

Sales materials

- Make it easy for them
- Share it with whomever you want
Shareable Links

- Link works for anyone who has it
- Can be read-only or editable
- Can set an expiration date
- Recipients decide who else gets access
- Guaranteed to open for anyone who receives it, on any device
- Share with anyone easily via email, chat, social, etc. No frustrating errors or sign-in/up
Contoso

Shareable link
...lets you forward to anyone as needed
...like an attachment

Has access because they have the link

Does not have access, gets access if they get the link

ExtranetUserManager

http://eum.co
Notification of anonymous link creation

• Protect your stuff by knowing when it’s been shared
• See what was shared
• Remove access if desired
Link for Only People in Your Organization

- Transferrable, revocable secret key
- Added security: users must also be signed in to the organization
- Allows recipients to forward within your organization
- Blocks external people from accessing
Internal-only shareable link (only people in Contoso with the link) ...lets you forward within your company only ...like a magic attachment that blocks external users
Scenario: Secure External Sharing

- I want an external partner to review my secret document

To Fabrikam Airlines,
As part of renewing our partnership, here is the data we discussed earlier.

Our confidential sales performance numbers for this past year are...

For your eyes only, Mr. Bond

To Fabrikam Airlines,
As part of renewing our partnership, here is the data we discussed earlier.
Our confidential sales performance numbers for this past year are...

Make it easy for them
Minimize effort to open the link

Keep it secure
Don’t let them forward it to anyone else
How to:

- Send a link that works for only specific people
- A non-transferable, revocable secret key
- Users must prove they’re the intended recipient
- Internal users and guest users must be signed in to their existing account
- External users verify with a one-time passcode
# Sign-in Experiences

<table>
<thead>
<tr>
<th>User Type</th>
<th>Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing Office 365 or Azure AD user</td>
<td>Logs in with their Azure AD credentials to accept the invitation</td>
</tr>
<tr>
<td>Business email not in Azure AD</td>
<td>Azure AD tenant is created behind the scenes</td>
</tr>
<tr>
<td></td>
<td>User creates a password</td>
</tr>
<tr>
<td></td>
<td>Can provide their name and country</td>
</tr>
<tr>
<td></td>
<td>Azure AD manages the password reset requirements</td>
</tr>
<tr>
<td></td>
<td>Tenant can be converted to a fully managed Azure AD tenant later</td>
</tr>
<tr>
<td>Consumer email (Gmail, Hotmail, etc.)</td>
<td>Account is converted to a Microsoft account in the background</td>
</tr>
</tbody>
</table>
Demo OOTB Sharing
Admin controls for external sharing
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
Three Places to Configure External Sharing

Office 365 Admin

SharePoint Admin

Site Collection Admin
Office 365 Groups and External Sharing
Three places to work

- **Personal files**
  - Private by default

- **Team sites**
  - Share content with your group

- **Communication sites**
  - Inform and engage a broader audience
Working as a team

- Shared from the start
- New members get full context
- Policy and lifecycle
- Office 365 Group collaboration tools
Microsoft 365: Universal Toolkit for Teamwork

Outlook | SharePoint | Yammer | Office Apps | Teams
---|---|---|---|---
Email & Calendar | Intranets & Content Management | Connect Across the Organization | Co-Author | Hub for Teamwork

Office 365 Groups
Single team membership across apps and services

Microsoft Graph
Suite-wide intelligence connecting people and content

Security and Compliance
Centralized policy management
Microsoft 365 Teamwork: Where to Start a Conversation

Outer Loop
- Yammer
- Outer Loop People you connect with openly across the organization

Inner Loop
- Teams
- Files
- Sites
- Content
- SharePoint
- Outlook
- Email
- Inner Loop People you work with regularly on core projects

Office 365 Groups
- Cross application group membership

Ubiquitous for targeted communications
External users in Office 365 Groups

- Receive mails sent to the Group email address
- Have access to the Group’s files and folders in OneDrive
- Have access to the Group’s site in SharePoint
- Participate in team chat in Teams
Adding External Users to Groups

Site permissions

Manage site permissions or invite others to collaborate

- **Site owners**
  - Webinar Client Site 2 owners
    - Full Control

- **Site members**
  - Everyone except external users
  - Webinar Client Site 2 members

- **Site visitors**
  - None

Advanced permissions settings

---

Add members

Add colleagues to this group. To add guests, go to Outlook.

Enter a name or email address

[Save]  [Cancel]

---

http://eum.co
Governance and Permissions
Governance

• Governance plan is a strong part of any Office 365 project
• Defines roles and responsibilities
• Not just who is allowed to do what
• Permissions are a key part
  • Not properly managing them often leads to a management mess
SharePoint Permissions Options

- Permissions can be applied at any level
  - Site
  - List or Library
  - Folder
  - Item level
- Good governance encourages permissions only at the top two levels

- Permissions can be applied to users or groups
- Groups can mean many things
  - SharePoint Group
  - Office 365 Group
  - AD Group -> Azure AD Group
  - EUM Group
- Good governance encourages only applying permissions to groups
Permissions and Group Membership

• Who can manage permissions should be different than who manages group membership
• Control of permissions should be tightly controlled
• Business should own group membership
Scenario – Sites Shared with Clients

- **Client site template**
  - Based off of Modern Team Site
  - Provisioned using Office Dev PnP template
  - Full Office 365 Group
- **Shared Documents shared with client**
- **Private Documents for internal users only**
- **Extranet User Manager leverages Azure AD B2B to share**
Demo Steps

1. Add site entry to Sites list
2. Run PowerShell script to create site, create EUM group, and assign permissions
3. Invite users through EUM
4. Email drives to Landing site with links to each site shared
Extranet User Manager Overview

- Delegated management of external users
- Self-registration, approval workflows, profile, and password management
- Search, add, edit, and import users and groups
- Supports on premise and O365, as well as custom and SaaS applications
Envision IT built custom Extranet solution

2008

2009

2010 IMPACT AWARD 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
Customers around the Globe

75+ Customers Deployed Globally
Five Considerations for your Extranet

1. Who will be accessing the extranet?
2. **Self-registration option or invitation only?**
3. How will your extranet users authenticate?
4. What interactions are your external users going to have?
5. What applications will be accessible?

### Invitation Only
- Smaller, known set of users
- Managed centrally or delegated

### Self Registration
- Onboarding hundreds or thousands of external users
- Approval workflows
- Auto-approvals
- Delegation
Customer Case Study: Associated Engineering

The Problem:
Associated Engineering work with multiple external parties on projects of various sizes. They require efficient collaboration and communication is key.

SharePoint on premises pilot quickly became production.

Lack of high-availability and disaster recover became a significant risk.
Customer Case Study:
Associated Engineering

The Results

- High-Availability & Disaster Recovery in Office 365
- External Partner Access through Azure AD B2B
- Delegated User Management with Extranet User Manager
- Project Site Creation Automation
Customer Case Study:  
OntarioMD goes to the cloud with Extranet User Manager

OntarioMD is a government funded NFP for 14K Ontario physicians  
www.ontariomd.ca

The Challenge:  
• Reduce the cost of current hosting  
• Easy to maintain site and update for 14,000 physicians and staff  
• Seamless migration of content, functionality and user accounts  
• Hosted and managed solution  
• **Needed a new corporate website and portal.**
Customer Case Study:
OntarioMD goes to the cloud with Extranet User Manager

OntarioMD is a government funded NFP for 14K Ontario physicians

www.ontariomd.ca

The Result:
• Physicians self-register with their OMA registration info
• Physicians can then sponsor staff to invite in
• Sponsored staff can become delegated admins
• Email and second factor verification (phone or text)
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
• Previous portal limitations
  • No search
  • No CMS required web designers to update
  • IT needed to manage infrastructure
  • No single sign-on to D2L
Customer Case Study:
OACAS Member Portal

OACAS is the Ontario Association of Children's Aid Societies

https://oacas.sharepoint.com

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

EUM Hosted Multi-Tenant Infrastructure

- EUM Database
- EUM / AD FS
- Traffic Manager
- EUM AD

- OACAS O365 Tenant
- OACAS Training Portal

D2L™
Five Considerations for your Extranet

1. Who will be accessing the extranet?
2. Self-registration option or invitation only?

3. **How will your extranet users authenticate?**

4. What interactions are your external users going to have?

5. What applications will be accessible?

- Email and password
  - Self-service password reset
- Office 365 / Azure AD
- Microsoft Account
- Google
- Facebook
- LinkedIn
- Twitter
Five Considerations for your Extranet

1. Who will be accessing the extranet?
2. Self-registration option or invitation only?
3. How will your extranet users authenticate?
4. What interactions are your external users going to have?
5. What applications will be accessible?

- Office 365 - SharePoint Online, OneDrive for Business
- Office 365 Groups – Teams, Planner, Yammer
- Other Office 365 Apps - Power BI, Stream, PowerApps, Flow
- SharePoint On Premises
- Third Party SaaS Applications
- Custom Applications – On Premise or Cloud

- OpenID Connect
- WS-Federation
Licensing
Extranet User Manager Licensing

<table>
<thead>
<tr>
<th>Version</th>
<th>On Premise</th>
<th>Hosted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Edition</td>
<td>$8,000</td>
<td>$850 / month</td>
</tr>
<tr>
<td>Enterprise Edition</td>
<td>$13,000</td>
<td>$1,070 / month</td>
</tr>
<tr>
<td>Annual Software Assurance</td>
<td>20%</td>
<td>Included</td>
</tr>
</tbody>
</table>

- Full pricing details available at [https://www.extranetusermanager.com/Pricing](https://www.extranetusermanager.com/Pricing)
Wrap-Up Points

• There are a lot of different ways to share in Office 365
• OOTB works well for small groups and specific documents or sites
• Make sure you understand where to enable it, and where not to
• Governance is important
• To scale you need processes
  • Site request form
  • Provisioning of sites and permissions
  • Consistent way to manage external users
Upcoming Sessions

Publishing Office 365 Websites to External Users with Azure Webinar
November 14, 2017

In this webinar, we'll take you through both public and private scenarios where you want to share your Office 365 content externally.

[link to event page] eum.co/events
Upcoming Conferences

SharePoint Fest

December 7-8, 2017
Chicago
www.sharepointfest.com/Chicago/

March 26 - 30, 2018
Washington, D.C.
http://www.sharepointfest.com/DC/

May 21-23, 2018
Las Vegas
https://www.sharepointna.com/

eum.co/events
Thank you

Questions?