

Building a Portal for Secure Data Collection and Reporting Across Municipalities

Tuesday, January 31st, 2023
12-1pm EST

Logan Guest



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Teams Meeting Etiquette

- This is a regular Teams meeting.
- Chat is open throughout the webinar.
- Feel free to ask questions or make comments through chat at any time.
- Please stay on mute. If you'd like to join the conversation, please ask on chat and wait for an invitation.
- Welcome, enjoy, and learn!

Peter Carson



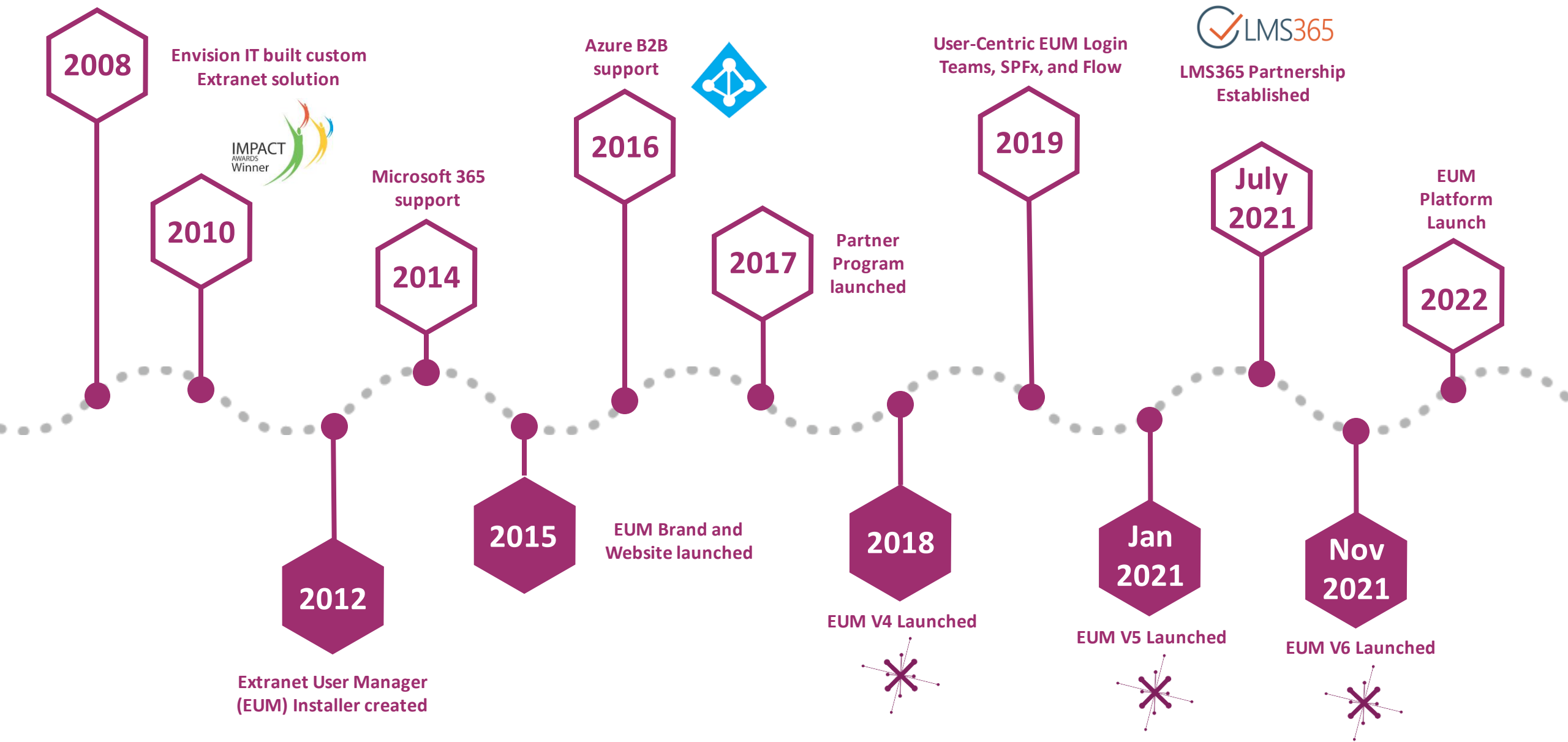
- President, Envision IT and Extranet User Manager
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- blog.petercarson.ca
- www.envisionit.com
- www.extranetusermanager.com
- Twitter @carsonpeter
- President Toronto SharePoint User Group



Meighan Finlay



- Executive Director, MBNCanada
- 20+ years in continuous quality improvement in public sector services, included municipal service delivery
- www.mbnCanada.ca

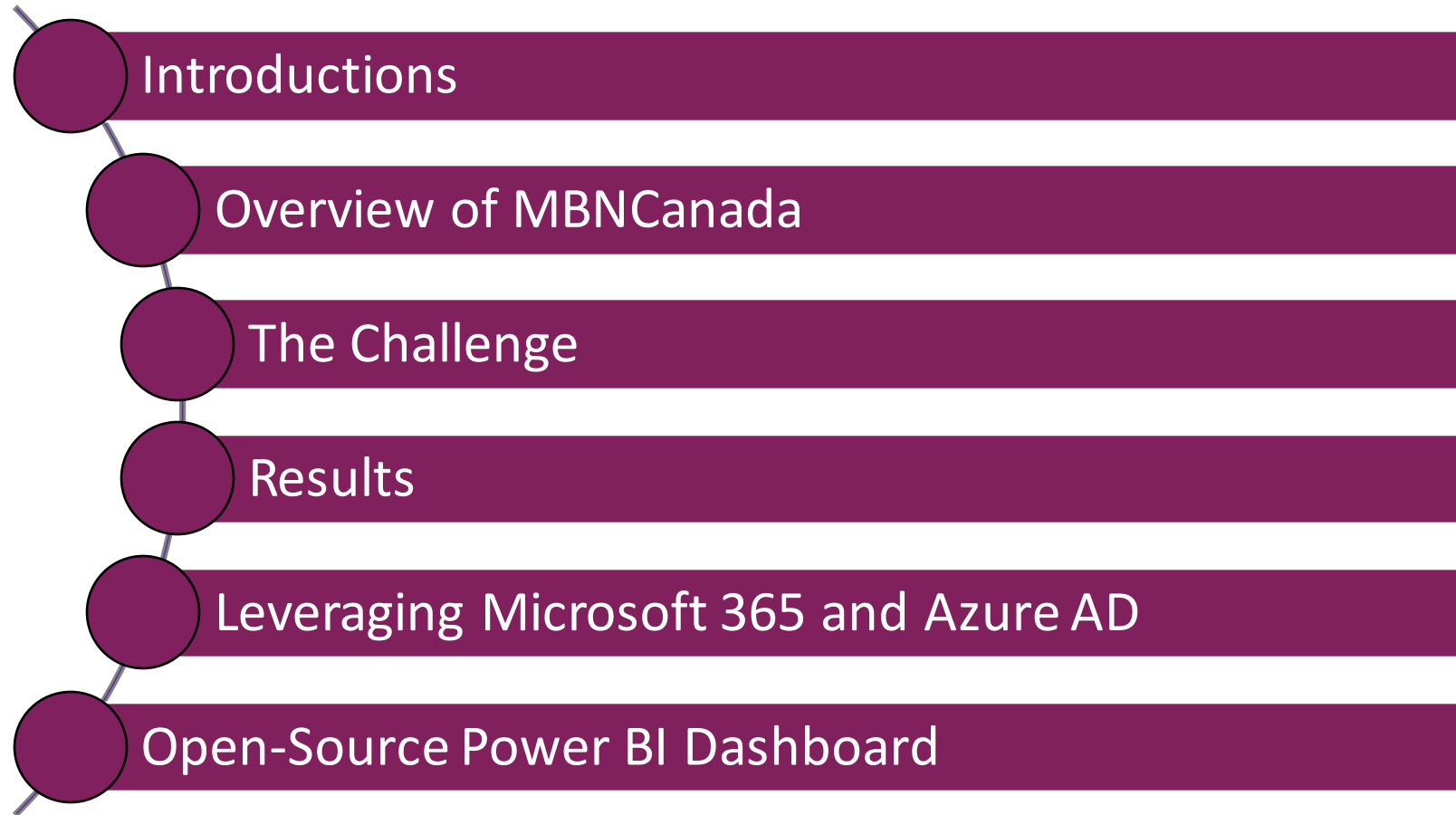


Customers around the Globe



100+ Customers Deployed Globally

Agenda



Who is MBNCanada?



- Not-for-profit association that supports municipal performance management through the provision of data collection, reporting and networking programs across Canada
- Collects 700 performance measures across 36 service areas on an annual basis
- Creates reports and data for municipalities, its board, and the general public

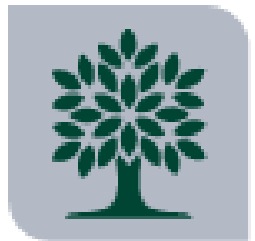
Mission: To enhance municipal service delivery through collaboration, networking and implementation of performance measurement, benchmarking and other municipal continuous improvement programs and initiatives

MBNCanada 2022 Portal Modernization

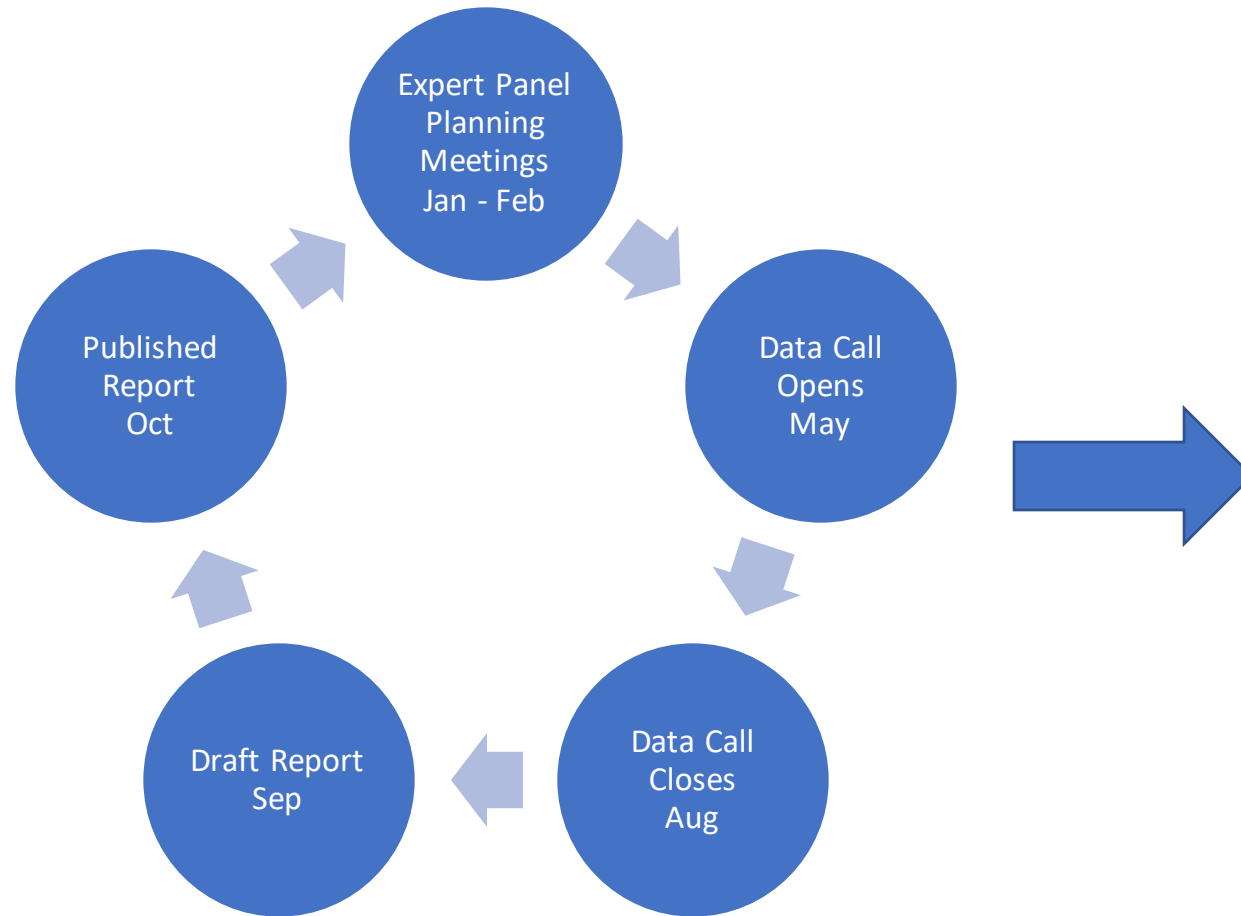


- Portal originally created in 2004 and hosted externally
- In 2022, project was launched to modernize the portal utilizing Microsoft 365
 - SharePoint, Teams, Power BI
- Utilizing Azure AD B2B to invite 1,000+ guests across the partner municipalities for data entry, reporting, committee and panel management
- MBNCanada staff invite Municipal Leads to Portal as Membership Managers
 - Municipal Leads manage their staff, and which panels they are on

Member Municipalities



Overview of Annual Data Collection Process



The Challenges



Aging application
and on-premise
infrastructure



Manual and time-
consuming process
- particularly the
report generation



Security
management



Access to the
shared data
warehouse

Project Objectives

1

Single portal and sign-on for communications, panel planning, collection of measures data, and reporting / visualizations

2

Simple and easy for Program Office and municipal users

3

Delegation of user setup and role assignment

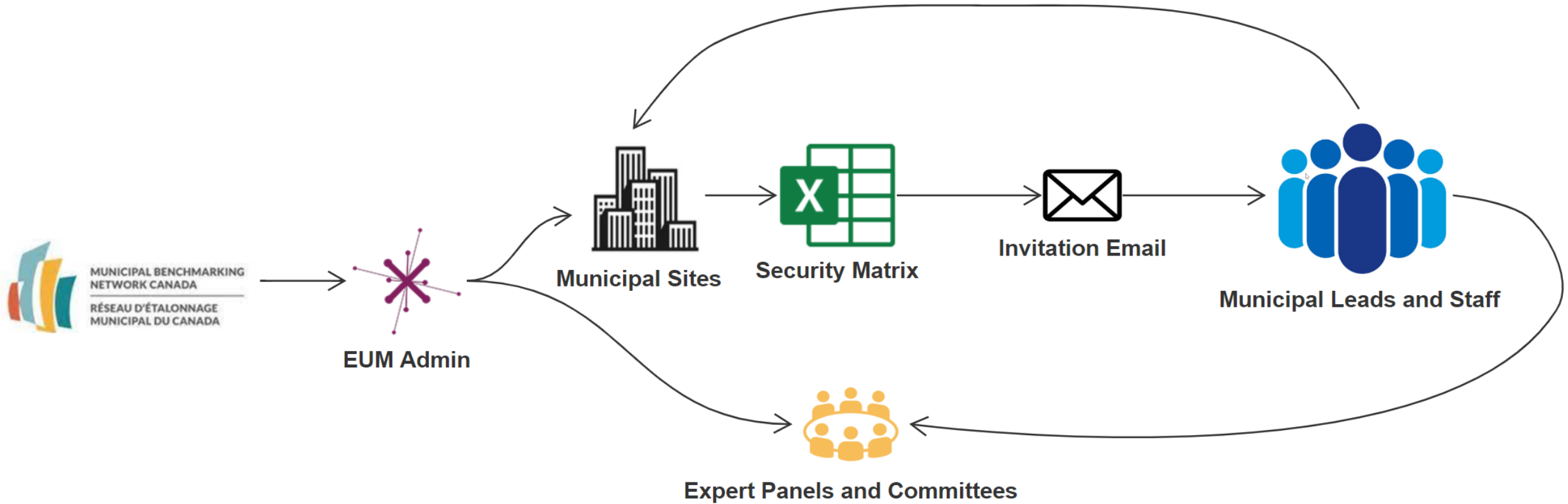
4

Automate the annual report generation

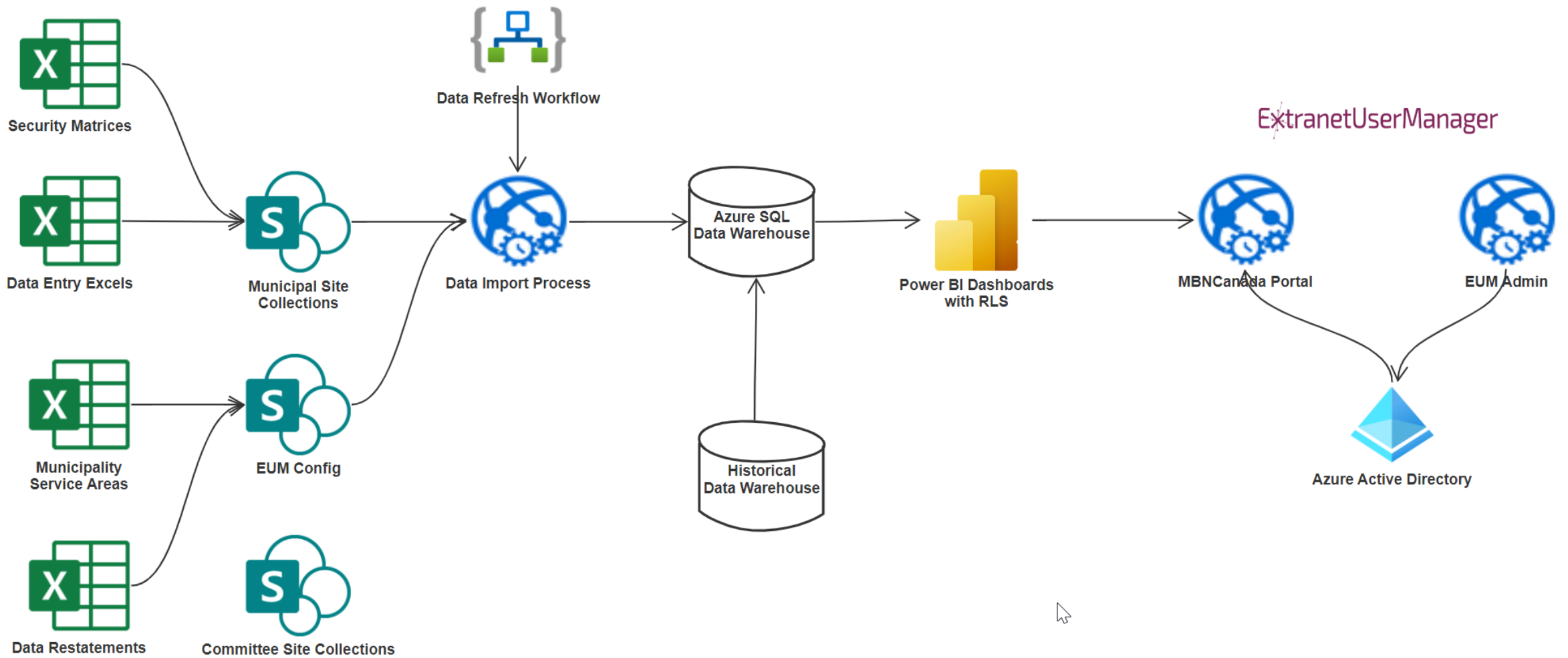
Portal Structure



Onboarding



MBNCanada Solution Architecture



Data Dictionary

- Link available on portal and within input Excls
- All Service Areas can drill down to specific measures
- Measure metadata

Export to PDF and Excel to sort, filter

Municipal Benchmarking Network Canada
Réseau d'établissement municipal du Canada

MBNCanada Portal

Reports Resources Data Dictionary Having an Issue? PC

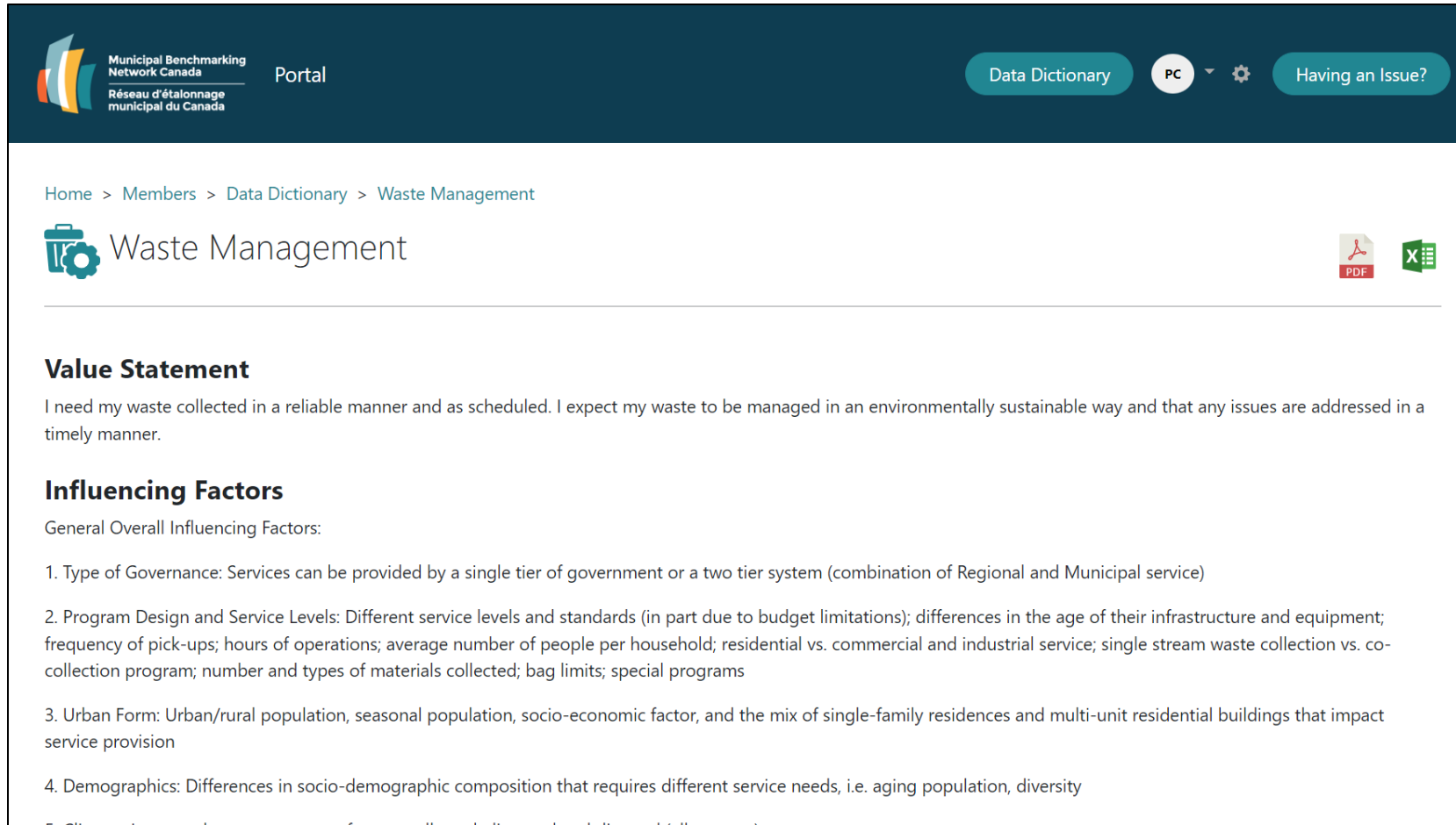
Home > Members > Data Dictionary

Data Dictionary

PDF Excel

Accounts Payable	Building Permits and Inspections	By-Law Enforcement
Child Care	Clerks	Culture
Emergency Medical Services	Emergency Shelters	Facilities
Fire and Rescue Services	Fleet and Management Services	General Government
General Revenue	Human Resources	Information Technology
Investment Management	Legal	Libraries
Licensing	Long-Term Care	Municipal Data

Data Dictionary – Service Area






The screenshot shows the 'Data Dictionary' page for 'Waste Management' on the 'Municipal Benchmarking Network Canada' portal. The page includes a navigation breadcrumb (Home > Members > Data Dictionary > Waste Management), a title 'Waste Management' with a trash can icon, and download links for PDF and Excel. The main content is divided into 'Value Statement' and 'Influencing Factors'.

Municipal Benchmarking Network Canada
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Portal

Data Dictionary PC Having an Issue?

Home > Members > Data Dictionary > Waste Management

 Waste Management  

Value Statement

I need my waste collected in a reliable manner and as scheduled. I expect my waste to be managed in an environmentally sustainable way and that any issues are addressed in a timely manner.

Influencing Factors

General Overall Influencing Factors:

1. Type of Governance: Services can be provided by a single tier of government or a two tier system (combination of Regional and Municipal service)
2. Program Design and Service Levels: Different service levels and standards (in part due to budget limitations); differences in the age of their infrastructure and equipment; frequency of pick-ups; hours of operations; average number of people per household; residential vs. commercial and industrial service; single stream waste collection vs. co-collection program; number and types of materials collected; bag limits; special programs
3. Urban Form: Urban/rural population, seasonal population, socio-economic factor, and the mix of single-family residences and multi-unit residential buildings that impact service provision
4. Demographics: Differences in socio-demographic composition that requires different service needs, i.e. aging population, diversity
5. Climate: Impact on the management of waste collected, disposed and diverted (all streams)

Data Dictionary - Measure

- Individual Measure pages display Measure metadata

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Portal

Data Dictionary PC Having an Issue?

Home > Members > Data Dictionary > Waste Management

SWST205 - Tonnes of All Residential Material Collected per Household

[Power BI](#) [PDF](#) [Excel](#)

Measure Characteristics	
Service Area:	Waste-Management
Cost Measure:	No
Created Year:	2002
Measure Classification:	Service Level
Measure Rank:	Descending
Measure Type:	Board Primary
Publicly Reportable:	Yes
Variance:	%Change
Environmental Sustainability:	No

Numerator:
Tonnes of material collected

Includes:

- SSO (Source Separated Organics)
- blue box
- leaf and yard waste
- HHW (Household Hazardous Waste)
- Community Recycling Centres and Depots
- tires
- electronics
- white goods
- scrap metal
- construction and demolition (C&D)

Excludes:

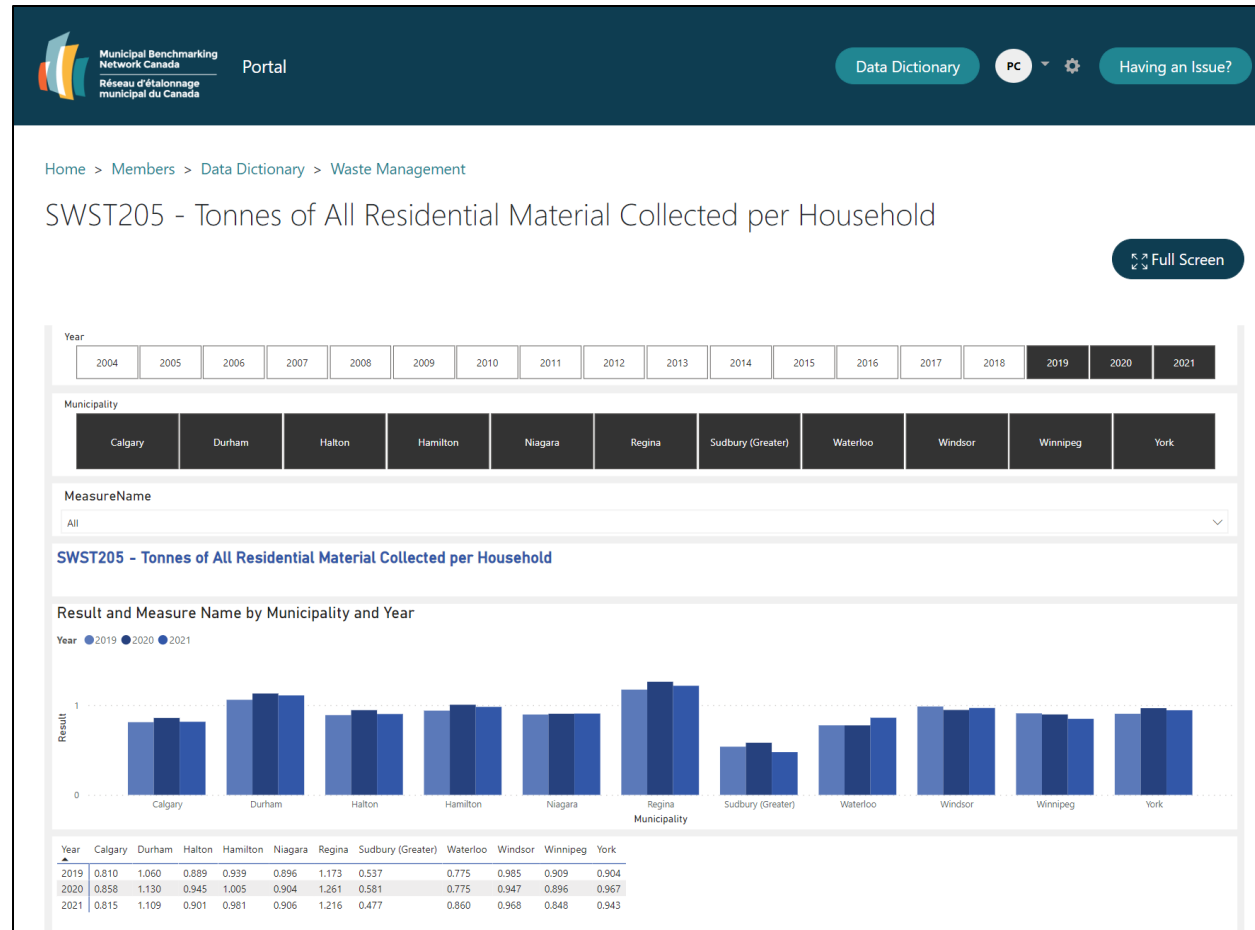
- grass cycling
- backyard composting

Denominator:
Per Household

Dynamic links to Power BI report for each measure



Measure Analysis with Power BI Embedded



Municipal Landing Pages

- Municipal staff only see Service Area Excels they have access to
- Member Contact Info
- Municipal Leads manage the Security Matrix here for their municipality

The screenshot shows the 'Municipal Benchmarking Network Canada' Portal for the City of Calgary. The header includes the logo, 'Portal', 'Data Dictionary', a user profile 'PC', and a 'Having an Issue?' button. The breadcrumb trail is 'Home > Members > Calgary'. Below this is the 'Calgary' header with a logo. The main content area is a grid of 20 service area links, each with an icon and the year '2021':

- Municipal Data 2021
- Accounts Payable 2021
- Building Permits and Inspections 2021
- By-Law Enforcement 2021
- Clerks 2021
- Culture 2021
- Facilities 2021
- Fire and Rescue Services 2021
- Fleet and Management Services 2021
- General Government 2021
- General Revenue 2021
- Human Resources 2021
- Information Technology 2021
- Investment Management 2021
- Legal 2021
- Libraries 2021

On the right side, there is a 'Contact' section with the email 'eumtest@eum.co' and a 'Members' section with an 'Email all Members' button. Below the button is a list of members with their initials and email addresses:

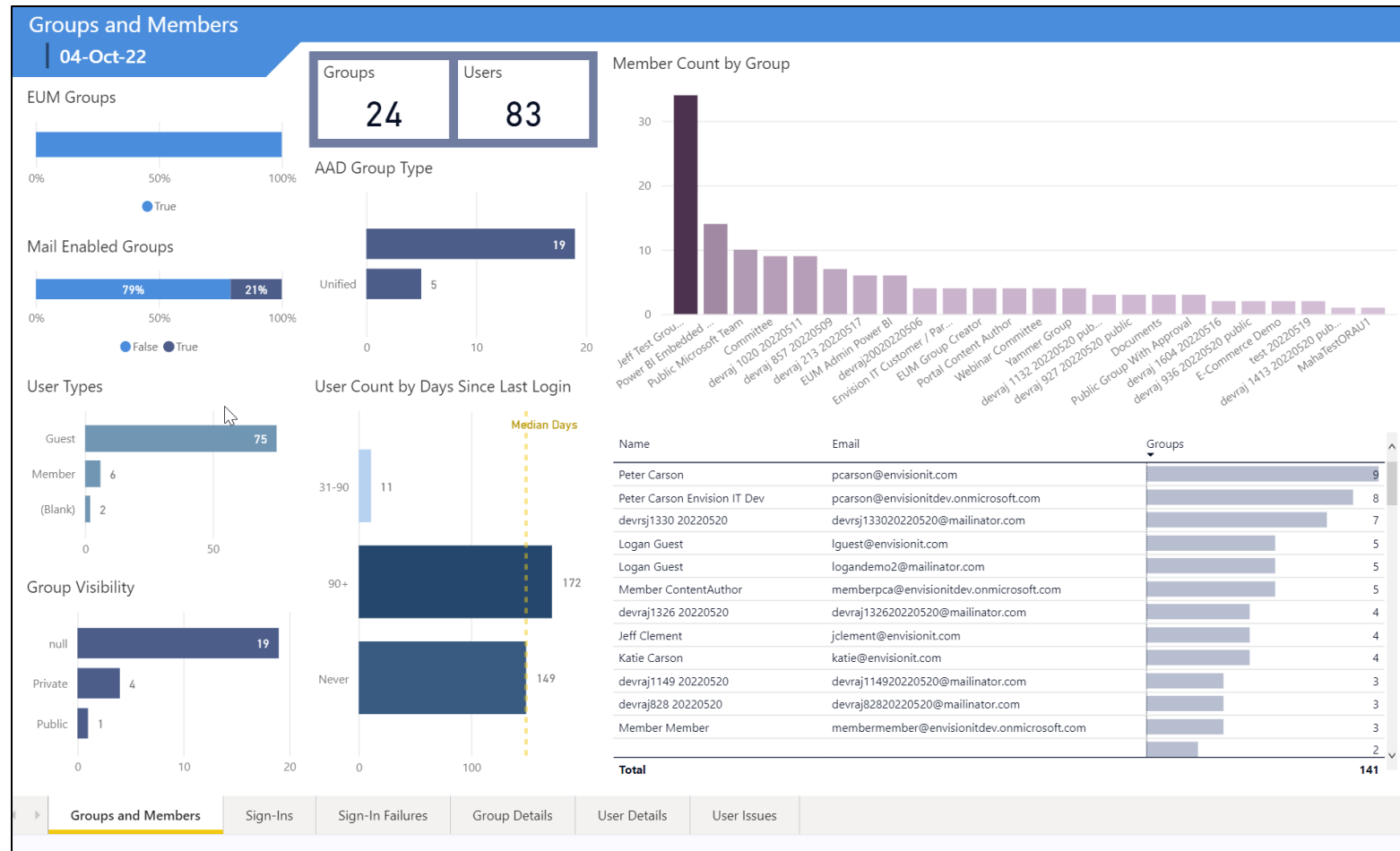
- OC One Calgary (onecalgary@mailinator.com)
- PC Peter Carson MBNDev (admin@mbncanadadev.onmicrosoft.com)
- TC Three Calgary (threecalgary@mailinator.com)
- TC Two Calgary (twocalgary@mailinator.com)
- D2 devraj2036 20220726 (devraj203620220726@mailinator.com)
- D2 devraj2037 20220726 (devraj203720220726@mailinator.com)
- D2 devraj2126 20220726 (devraj212620220726@mailinator.com)
- D2 devraj2138 20220726 (devraj213820220726@mailinator.com)

Data Input Overview

- Excel Template with all measures and formulas as approved by MBNCanada each year
- Year Rollover Process Automates Creation of Municipal Excels
- Upload into Security Trimmed Workspaces
- Specific Cells can be locked on Input Excels
- Audit Trail and Previous Year Lockdown Features

Line	Description	Numerator	Denominator	Result	Previous Result	% Change	Variance and Data Specific Comments	Municipal Data Source
MUN001	Population				161,531			
MUN002	Households				75,792			
MUN005	Geographic Area (Sq. Km)				3,625.00			
MUN008	Population Density				44.56			
MUN010	Total Budgeted Municipal FTE				2,673.00			
MUN020	Municipal Expenses (Operating)				\$520,640,300			
MUN025	Municipal Expenses (Operating and Capital)				\$654,311,740			
MUN030	Municipal Purchases (Operating and Capital)				\$328,480,900			
MUN050	Municipal Operating Costs				\$520,640,300			
MUN065	Total Property Assessment (used in Fire Service area only)				\$20,138,985,000			

Azure AD Power BI Dashboard



Wrap-Up Points

- Built on the Microsoft 365 platform you already own
- Leverage OOTB Excel for sophisticated data collection
- Power BI is both a data modelling tool and awesome at visualizations
- EUM makes it easy for everyone
- Delegation is important – let the owners manage things
- Don't forget about security!

Take a Test Ride into our EUM Power BI Embedded Group

- Check out our Power BI Embedded template in EUM Test Ride
- Login using your preferred credentials
- Contact us for an in-depth demo of all supported login and registration scenarios

The screenshot displays the ExtranetUserManager interface. At the top, the logo 'ExtranetUserManager' is on the left, and 'Test Ride' and 'Login / Register' buttons are on the right. Below the header, there are four navigation tabs: 'Document Sharing & Collaboration', 'Dashboards & Analytics', 'Web Publishing', and 'Learning Management'. The 'Dashboards & Analytics' tab is active, showing a 'Power BI Embedded Demo' section. This section includes a 'Features' list and a 'Join Group' button. The Power BI dashboard itself contains several visualizations: a 'Sign Ins' summary with '39K' Successes and '2,788' Failures; a 'Sign Ins by Display Name' table; a 'Sign Ins by App' bar chart; a 'Sign Ins by Client Browser' donut chart; a 'Sign Ins by State' world map; and a 'Sign Ins and Failure / Success Ratio by Month Year and Login Success' bar chart.

ExtranetUserManager

Test Ride → Login / Register

Document Sharing & Collaboration Dashboards & Analytics Web Publishing Learning Management

Power BI Embedded Demo

Features:

- > Save on licensing costs - no Power BI license required
- > Optimizes Azure spend by turning service on only as needed
- > Supports dashboards, paginated reports, and row level security

Join Group →

Sign Ins
17-Nov-22

Logins Successes: 39K Failures: 2,788

Sign Ins by Display Name

Display Name	Count
John Doe	100
Jane Smith	80
Bob Johnson	60
Alice Brown	50
Charlie Davis	40
Eve Wilson	30
Frank Green	20
Grace White	10
Henry Black	5
Ivy Gray	3
Jack Blue	2
Karen Red	1

Sign Ins by App

App	Count
SharePoint	1,200
Office 365	1,100
Microsoft	1,000
Power BI	900
Outlook	800
Word	700
Excel	600
Teams	500
OneDrive	400
Skype	300
Edge	200
Chrome	100

Sign Ins by Client Browser

Browser	Count
Chrome	150,000
Microsoft Edge	100,000
Firefox	50,000
Safari	30,000
Internet Explorer	10,000

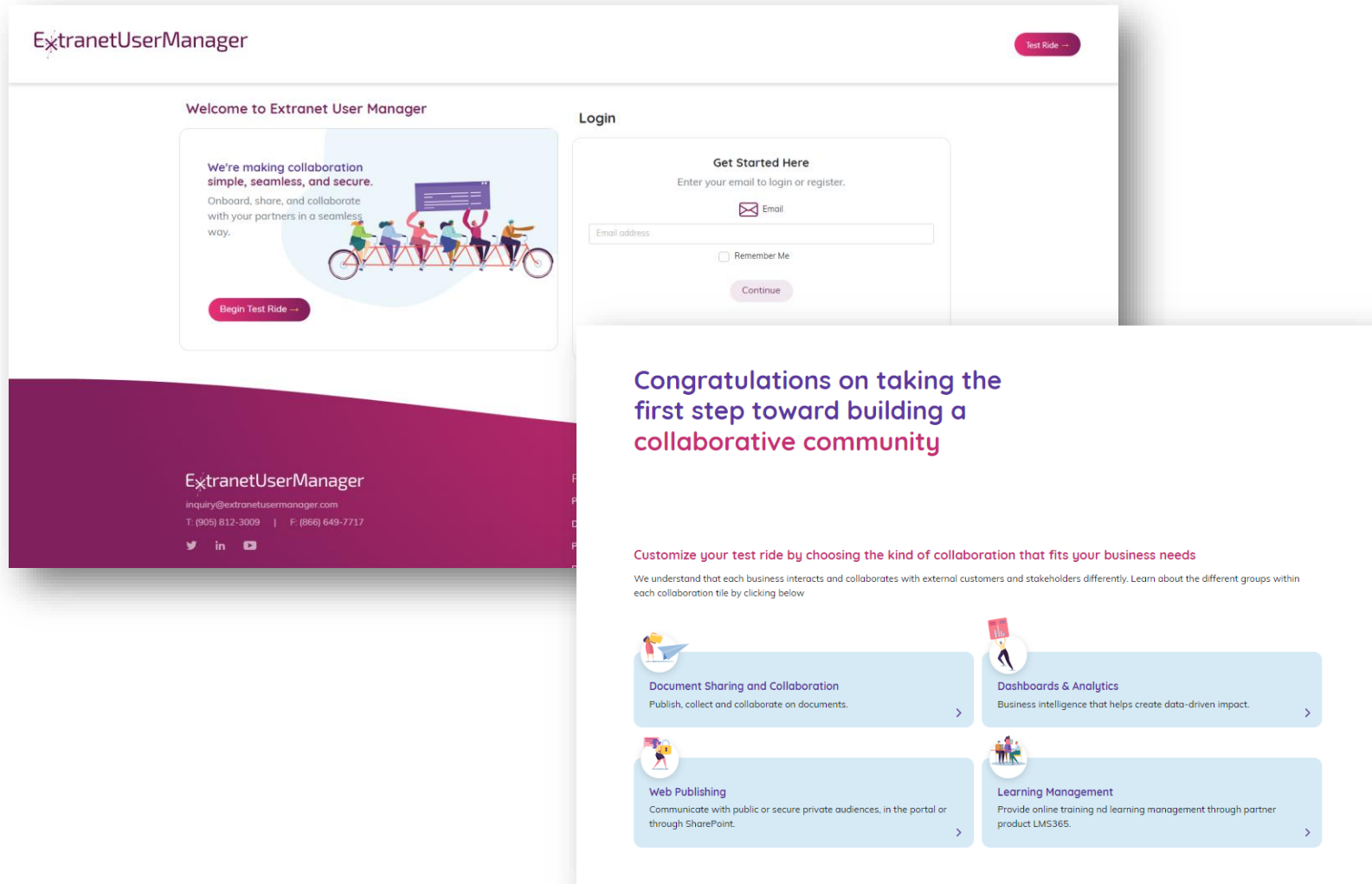
Sign Ins by State

World map showing sign-in activity across North America, Europe, Asia, South America, Africa, and Australia.

Sign Ins and Failure / Success Ratio by Month Year and Login Success

Month Year	Success Ratio	Failure Ratio
Nov 2021	92.5%	7.5%
Dec 2021	93.0%	7.0%
Jan 2022	93.5%	6.5%
Feb 2022	94.0%	6.0%
Mar 2022	94.5%	5.5%
Apr 2022	95.0%	5.0%
May 2022	95.5%	4.5%
Jun 2022	96.0%	4.0%
Jul 2022	96.5%	3.5%
Aug 2022	97.0%	3.0%
Sep 2022	97.5%	2.5%
Oct 2022	98.0%	2.0%
Nov 2022	98.5%	1.5%

EUM Test Ride



- Test out different user journeys and sign-in flows
- Learn how EUM leverages Microsoft 365 to streamline and simplify the way you onboard, share, and collaborate externally

Next Steps



Webinar recording and presentation slides will be available on the event page tomorrow

Want to learn more? Check out our previous MBN webinar: [Board and Committee Management with MBNCanada | Extranet User Manager](#)



Your feedback is appreciated! Please fill out the following poll: [Webinar Feedback](#)



We'd love to hear more about what you are interested in:

- Would you like a technical session that goes deeper into how the solutions are built?
- What other sessions would you like us to host?



Try out EUM Test Ride at www.portal.eumdemo.com/testride



Schedule time with us to discuss your scenario: [EUM Discovery Call \(office365.com\)](#)

Thank you

Questions?