EUM V6 Suite Deployment Guide

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ExtranetUserManager

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Overview

Extranet User Manager Suite Overview

Extranet User Manager (EUM) is a suite of applications for supporting external digital communities. It consists of:

- User Manager – Manage external users and the groups they belong to
- Portal – Anonymous and secured portal with registration and user profile support. Integration of User Manager, Documents, and Publisher
- Publisher – Headless CMS leveraging SharePoint Online as its content repository

EUM customers can collaborate with external vendors, partners, suppliers and others in a secure environment with individual permission levels. The Extranet solution may also be used to provide access to employees who do not have active directory accounts or who are connecting from outside of the network.

About this Guide

This guide provides instructions to deploy and configure EUM V6 using an Azure ARM Template and PowerShell script. It is intended to provide instructions for typical deployments in an Azure Application Service. Customized deployments may require additional information and/or configuration.

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Pre-Requisites

DNS and SSL Requirements

- SSL Certificates for the App Service. Microsoft now provides free SSL managed certificates as an alternative
- DNS and Host names for EUM website

Install Credentials

- To be installed by a Azure and Office 365 global administrator

PowerShell Modules

The following PowerShell modules need to be installed on the local workstation where the installation PowerShell is going to be run. Ensure that the following modules are installed by running PowerShell ISE in administrator mode and verifying and installing each module.

Azure Az

Confirm if installed and which version	Get-Module Az* -ListAvailable	Select-Object Name,Version	Sort-Object Version -Descending
Minimum version recommended	5.1.2
Install	Install-Module -Name Az -Scope CurrentUser -Repository PSGallery -Force

https://docs.microsoft.com/en-us/powershell/azure/install-az-ps

Warning: Microsoft does not support having both the AzureRM and Az modules installed for PowerShell 5.1 on Windows at the same time. See the above article for details.

AzureAD

Confirm if installed and which version	Get-Module AzureAD* -ListAvailable	Select-Object Name,Version	Sort-Object Version -Descending
Minimum version recommended	2.0.2.140
Install	Install-Module -Name AzureAD
Update	Update-Module -Name AzureAD

https://docs.microsoft.com/en-us/powershell/module/azuread

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PnP

Confirm if installed and which version	Get-Module PnP* -ListAvailable | Select-Object Name,Version | Sort-Object Version -Descending
Minimum version recommended	1.7.0
Install	Install-Module -Name PnP.PowerShell

[Installing PnP PowerShell | PnP PowerShell](#)

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Extranet User Manager Suite Installation

EUM can be installed as either just the EUM Admin installation, or the full Suite installation that also includes Portal and Publisher.

The main steps involved in installation are the same whether you are installing just EUM Admin or the full Suite.

1. ARM template deployment of the App Service
2. PowerShell configuration script
3. Custom domains and SSL
4. Validation

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ARM Template Azure App Service Installation

1. Launch the deployment of the Azure resources from one of the two links below:

    EUM Suite ARM Template

    EUM Admin ARM Template

2. Fill in the Fields on the Template and update the highlighted info. **Do not have duplicate names for items. It causes the template to fail.**

Field	Notes
Subscription	The Azure subscription to install into
Resource Group	Select an existing resource group, or create a new resource group. We recommend creating a new dedicated resource group for the full EUM Suite
Region	Data centre where the resources should be deployed
App Plan Name	Name of App Plan that will host the App Service. Currently a new App Plan must be created, but once created you can move the App Service to an existing App Plan and delete this one if desired. The value must have a length of at most 20
App Plan SKU	Plan's pricing tier and instance size. Check details at https://azure.microsoft.com/en-us/pricing/details/app-service/
App Plan SKU Capacity	Number of instances (nodes). Minimum of 1, or 2 to get Microsoft's SLA
Admin Web App Name	Admin site App service name, which needs to be globally unique. The service will be initially published as https://*webappname*.azurewebsites.net The value must have a length of at most 20
Portal Web App Name	Portal site App service name, which needs to be globally unique. The service will be initially published as https://*webappname*.azurewebsites.net The value must have a length of at most 20
Config Site URL	SharePoint site collection URL that will be used as the configuration site for the EUM Suite. The SharePoint site collection does not need to be created prior to installation.

3. Agree to the terms and conditions and click Purchase

4. Review deployment progress to ensure that items are provisioned

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5. Once deployment is successful the following should be provisioned:

    a. Resource Group (if new)
    b. App Service Plan
    c. 2 Azure App Services
   i.   EUM_Admin
        ii. EUM_Portal

PowerShell Configuration Script

The PowerShell configuration script does the following:

1. Prompts for the subscription and App Service to configure
2. Retrieves additional configuration information from the App Service configuration
3. Registers the API and EUM Admin and Portal App registrations in Azure AD
4. Adds additional App Service configuration items
5. Deploys a number of Logic Apps via ARM Templates
6. Deploys the PnP template to the SharePoint config site collection
7. Uploads Publisher Pages, Publisher Page Templates and Suite Email Templates to SharePoint config site collection
8. Updates default values in SharePoint config site collection

Before running the scripts, if they were downloaded from the website and extracted from the zip archive, they first need to be unblocked. Follow these steps to do this:

1. Open the folder with the extracted files in Windows Explorer

2. Right-click on the first .ps1 script and select Properties

3. Check the Unblock checkbox and click OK
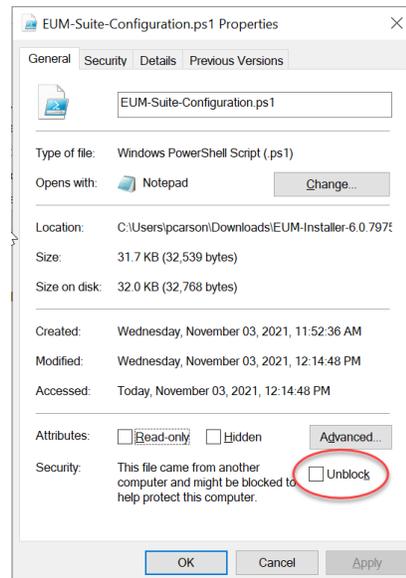
4. Repeat for the other two scripts

   a. EUM-Suite-Helpers.ps1

   b. EUM-Suite-Uninstall.ps1

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Our recommendation is to run the EUM-Suite-Configuration.ps1 script in the Microsoft ISE editor. This can be launched by right-clicking on the script and selecting Edit.

The script first prompts for the Azure Subscription, and then for the instance of EUM to configure.

As the script runs it will prompt multiple times for credentials. The credentials used should be a global admin in the tenant being installed into, and should also have access to the SharePoint EUM Suite config site collection.

As part of registering the apps in Azure AD, a number of permissions are required to be consented to. There are three sets of permissions: one for the API, a shorter set for the EUM Admin web app and another set for the EUM Portal web app.

Granting Admin Consent for EUM-Portal

EUM-Portal's app registration needs API permissions from our custom EUM-API, but we're currently unable to Grant Admin Consent for the permissions needed via code and this must be done manually. Once the PowerShell script is completed, do the following:

1. Navigate to Azure Active Directory (AAD)

2. Select App Registrations on the left navigation

3. Switch to "All applications" and search for the EUM_Portal app registration.

   - <EUM-Portal Web App Name>_EUM_Portal

4. On the left navigation select "API Permissions" and you'll notice that the EUM-API permissions does not have Admin Consent.

5. Click the "Grant admin consent for <Tenant Name> and then click "Yes"

6. Now all the permissions should be green.

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. Learn more about permissions and consent

+ Add a permission   ✓ Grant admin consent for Envision IT Dev

API / Permissions name	Type	Description	Admin consent requ...	Status	
⌄ EUM-V6-Dev-4-Admin_EUM_API (3					•••
EUM_API	Delegated	Access to EUM API	No	✓ Granted for Envision IT ...	•••
Group.ReadWrite	Application	Group.ReadWrite	Yes	✓ Granted for Envision IT ...	•••
User.ReadWrite	Application	User.ReadWrite	Yes	✓ Granted for Envision IT ...	•••
⌄ Microsoft Graph (2)					•••
User.Read	Delegated	Sign in and read user profile	No	✓ Granted for Envision IT ...	•••
User.Read.All	Application	Read all users' full profiles	Yes	✓ Granted for Envision IT ...	•••
⌄ SharePoint (2)					•••
AllSites.Read	Delegated	Read items in all site collections	No	✓ Granted for Envision IT ...	•••
Sites.FullControl.All	Application	Have full control of all site collections	Yes	✓ Granted for Envision IT ...	•••

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Logic Apps API Connection Authorization

A number of API Connections are deployed to Azure as part of the deployment package. These connections are used in the Logic Apps and must be authorized before they are usable in Logic Apps.

1. Navigate to the resource group where EUM has been deployed

2. Sort the resources by type to easily find all the "API Connections"

3. Select an API Connection

4. On the left nav select "Edit API Connection"
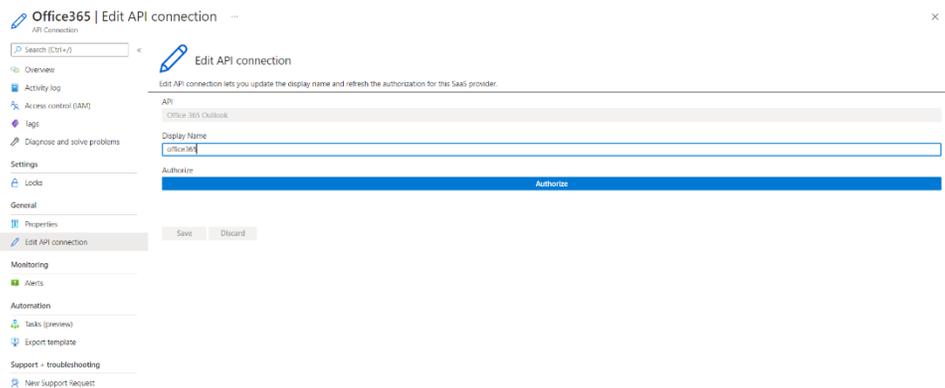
5. Click "Authorize"

6. A login prompt will appear and you can sign-in

   - **NOTE**: The account used to sign-in is the account that would be used in the Logic Apps. <u>Example</u>: The account used for to authorize the office365 connection is the account the Logic Apps would use to send emails.

7. Once you've signed-in click "Save"

8. Repeat steps 3-7 for all API connections.

Logic Apps AAD Authorization Policies

Some of our Logic Apps utilize Azure Active Directory Authorization Policies. Currently only 2 of our Logic Apps needs this to be setup:

1. eum-portal-myprofile-get

2. eum-portal-myprofile-post

To setup AAD Authorization Policies on the above Logic Apps do the following:

1. Navigate to the Logic App that needs to be updated

2. On the Left Navigation go to "Authorization"

3. Click Add Policy

4. Click Add standard claim

5. Fill in the fields as follows:

Name	Value
Policy Name	Azure AD Authentication
Issuer	https://sts.windows.net/<Tenant Id>/
Audience	<Client Id of the Portal App Registration>

6. Click Save

7. Repeat step 1-6 for any other Logic Apps.

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Applying EUM License

Once the script is completed and you've completed the previous steps above you're almost ready to start up EUM-Admin and EUM-Portal but before that, we need to setup your EUM License in the SharePoint config site collection. **Before continuing it is recommend to <u>STOP</u> both EUM-Admin and EUM-Portal Web Apps**.

1. Retrieve the license file provided to you by Extranet User Manager

2. Navigate to the EUM SharePoint config site collection

3. On the home page select Suite Config

   a. The "Config" link under "Suite"

4. Click on the License list item and copy/paste the contents of your license into the "Value" section.

5. Click anywhere in the white property box to save the value

6. Now start both EUM-Admin and EUM-Portal Web Apps

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Custom Domains and SSL

We encourage the use of custom domains and SSL certificates with EUM. With Azure App Services this is quite easy, and does not require the purchase of an SSL certificate. Microsoft provides a free managed SSL certificate, and the renewal and updating of it is managed by Microsoft.

Custom Domain

In order to apply a custom domain to an Azure App Service, you do need to have the ability to add CNAME records to the domain to be applied. To add a custom domain, follow these steps:

1. Enter a CNAME record in your domain management tool for the Azure App Service (*appname*.azurewebsites.net)

2. In the App Service blade in the Azure portal, go to the Custom domains section and select Add custom domain

3. Enter the custom domain to be used

4. Click the Validate button

5. It may take up to 48 hours for the CNAME to propagate through the Internet to Microsoft, although this often only takes a few minutes. This depends on your domain host. If it does not validate, wait and retry the validation

6. Add the custom domain

SSL Certificates

App Service Managed Certificates are a simple and free way to provide secure, Microsoft provided SSL certificates on your custom domain. Follow these steps to create and apply the certificate.

1. Go to the TLS/SSL settings for the App Service

2. Go to Private Key Certificates

3. Select Create App Service Managed Certificate

4. Choose the custom domain to create the certificate for and select Create

5. Choose whether you want IP based binding or SNI. SNI does not require a dedicated IP address, but is not supported on older legacy browsers. These browser versions are well out of support, and we generally recommend using SNI based binding

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Updating the Azure AD Registration

In order for the Azure AD login to EUM Admin to work properly, the new custom domain and SSL routing needs to be added to the EUM Admin App Registration.

1. Go to Azure Active Directory in the Azure portal

2. Go to App registrations

3. Search and select the *xxx*_EUM_Admin App registration just created, where *xxx* is the App Service name EUM was installed to

4. Go to Authentication

5. Select Add URI and add the new App Service URL as the URI

6. Save the App Registration

Updating the SharePoint Config

The Admin and Portal URLs are stored in the Suite Config list in the EUM SharePoint site collection. These should be updated to reflect the new URLs. Once updated, the App Services for both Admin and Portal should be restarted in the Azure portal.

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Office 365 EUM Group Members SPFx webpart (Optional)

The EUM Group Members SPFX Webpart is an optional component of EUM. This webpart can be used in SharePoint Online or Microsoft Teams to display and manage group membership related to SharePoint Online sites. This webpart provides a convenient way to access sites and manage groups within SharePoint sites or Teams as an option as the EUM Admin application provides full capabilities to manage groups and users.

Within the EUM Install folder, use the following files to install the SPFx webpart into your SharePoint tenant:

EUMV6_SetSPFxTenantProperties.ps1

EUM_SPFx\eum-group-members.sppkg

Prerequisites

1. URL for the deployed EUM Admin
2. App registration Client ID for the EUM API
3. 'All B2B Users' EUM group created
4. PnP PowerShell Module installed
5. Credentials of a SharePoint administrator

Create App Catalog

Skip this section if the App Catalog has already been created.
1. Navigate to the SharePoint Admin center and then click on **More Features** in the left nav
2. Under **Apps**, click **Open** and then click on **App Catalog**
3. Ensure that "Create a new app catalog site" is selected and then click **OK**
4. On the Create App Catalog Site Collection, fill out the form as follows and click OK:
    a. **Title**: App Catalog
    b. **Web Site Address**: appcatalog
    c. **Time Zone**: Select the appropriate time zone
    d. **Administrator**: Select a global administrator
5. Wait a few minutes for the App Catalog to be created before proceeding

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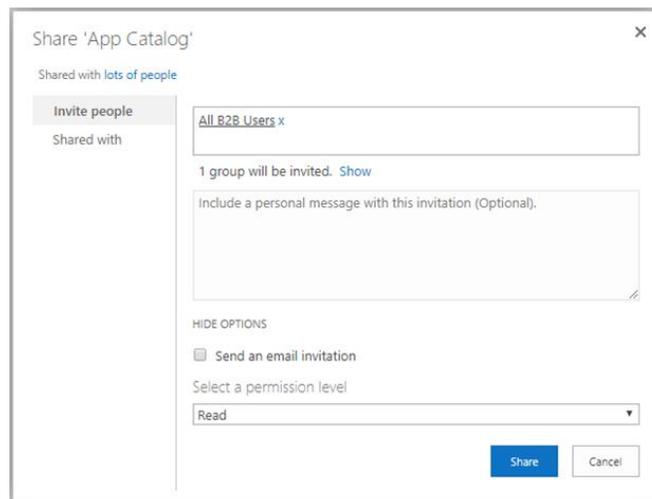## Enable Office 365 CDN and Set Tenant Properties

1. Open the PowerShell ISE as an administrator
2. Open the EUMV6_SetSPFxTenantProperties.ps1 file within the EUM Installer package
3. At the prompt enter the required information and login with an account that has admin access to SharePoint.

It can take up to 15 minutes for the CDN to finish provisioning. Check the status by executing the following command. The provisioning is complete when there are no "(configuration pending)" messages. You can proceed to deploy the SPFx webpart after this is completed.

Deploy EUM Group Members SPFx Webpart

The EUM Group Members webpart returns the list of groups and the members that are associated with the current site.

1. Navigate to the **App Catalog** and click on **Apps for SharePoint**
2. Upload the **eum-group-members.sppkg** file (located in the EUM Installer package in the EUM_SPFx folder).
3. In the dialog box, check the **Make this solution available to all sites in the organization** option.
4. Click **Deploy**.
5. Navigate to the SharePoint Admin center and then click on **API management** (under Advanced)
6. Select the EITO365API request under Pending approval and click the **Approve or reject** button. In the dialog, click **Approve**.
7. Navigate to the **gear > Site settings > Site permissions**
8. Click **Grant Permissions** and fill out the form as follows and click **Share**:
   a. Search for the EUM group containing all B2B Members
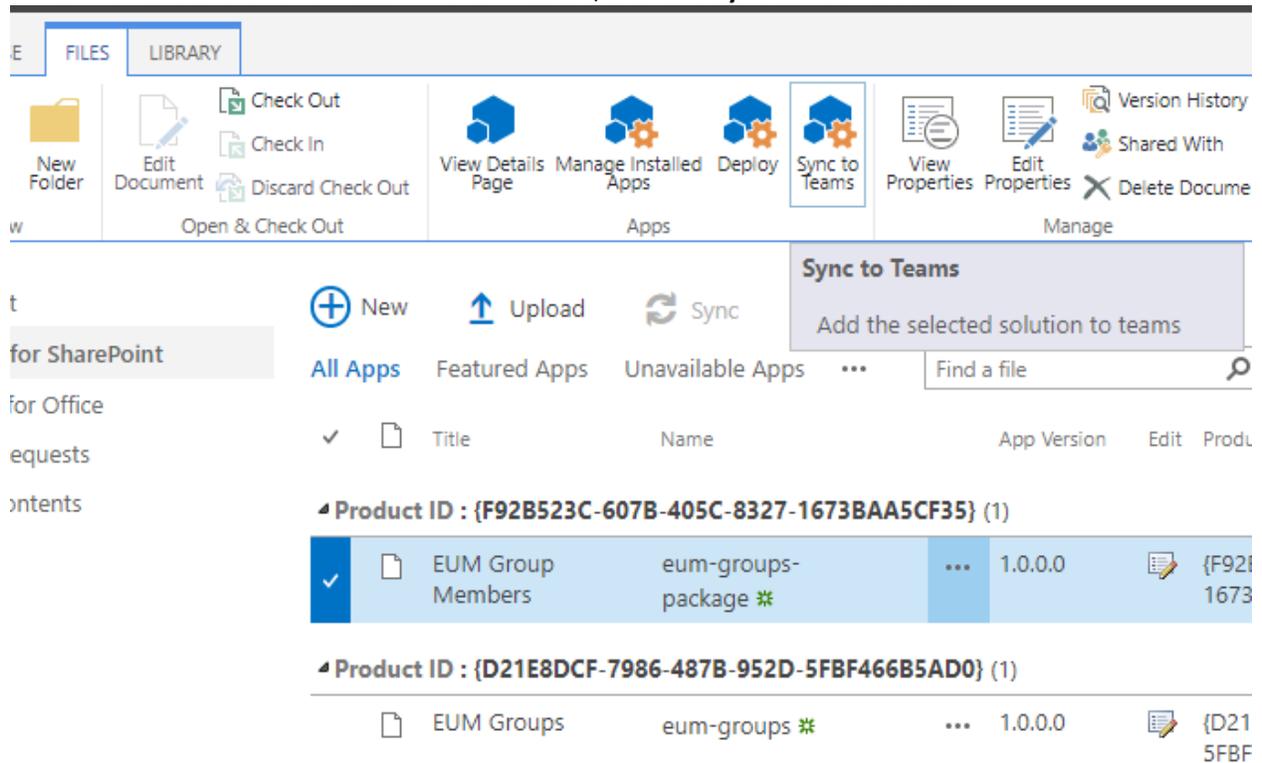   b. Click **SHOW OPTIONS** and uncheck "Send an email invitation". Select **Read** from the **Select a permission level dropdown**.

Deploy SPFx Web Part as Teams App

The steps in the above sections must be completed before proceeding.
1. Navigate to the **App Catalog** and click on **Apps for SharePoint**
2. Select the Apps that you want to make available to Teams
3. On the SharePoint Ribbon in the **Files** tab, click the **Sync to Teams** button

Add SPFx Web Part to a Team

1. Open **Microsoft Teams** and move to any channel in a team.
2. Select **+** to add a new tab on the channel
3. Under **More Apps**, search and or click the app you wish to add (EUM Group Members or EUM Groups)
4. In the pop up, click **Add to a Team**
5. In the pop-up, click **Set up a tab**
6. When the tab loads, click **Apply** in the webpart property pane and then close it.

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Uninstalling EUM

The PowerShell uninstallation script does the following:

1. Prompts for the subscription and App Service to configure
2. Prompts for the components to uninstall
   a. SharePoint site collection
   b. Azure AD App Registrations
   c. Azure Resources
3. Removes the selected components
4. In the case that the Azure Resources and Resource Groups isn't delete they can safely be manually deleted after the EUM-Suite-Uninstall.ps1 script has been run.

Our recommendation is to run the EUM-Suite-Uninstall.ps1 script in the Microsoft ISE editor. This can be launched by right-clicking on the script and selecting Edit.

The script first prompts for the Azure Subscription, and then for the instance of EUM to uninstall.

As the script runs it will prompt multiple times for credentials. The credentials used should be a global admin in the tenant being installed into, and should also have access to the SharePoint EUM Suite config site collection.

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Troubleshooting Tips

When making configuration changes, you need to clear the cached configuration in the App Service, as well as the local session storage cached version in the browser.

1. Log into EUM Admin

2. Click the Power button on the top right of Admin and select Clear Cache to clear both session and configuration cache for Admin

If you've just installed EUM-Portal and after the completing all the steps the home page isn't loading, this might be due to the pages not being pushed into Azure yet by Publisher. Publisher usually runs in 15 minute intervals but if you'd like to fast-track the publishing process.

1. Go to the EUM-Portal Web App.

2. In the left navigation scroll down to WebJobs.

3. Click on EUM_Publisher and a "Run" option should appear in the top navigation on the page.

4. Click it and wait a couple seconds, up to a minute for EUM_Publisher to run

5. Restart EUM_Portal and try navigating to the page again, the home page should now load.

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