Introduction

- A little about Essential...

- Today's session format

- What happens when there's no appropriate ways to share?

....and what can you do about it?

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Adopt. Adapt. Thrive!

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- President, Toronto Microsoft 365 User Group
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  - blog.petercarson.ca
  - https://www.linkedin.com/in/petercarson/
  - eit.co
  - eum.co

3 Key Takeaways

1 Ensure business satisfaction while IT and Compliance enjoy peace of mind

2 Streamline processes for improved productivity for all parties

3 Control your data and branding while leveraging Microsoft's enterprise-grade security in your M365 tenant

About Us

- Established in 2008 in Toronto, Canada area
- Brand of software products owned by Envision IT Inc.
- Leader in the Microsoft 365 space and a Microsoft Partner for 10+ years

Extranet User Manager

We Make Microsoft Simple

- **We make Microsoft simple for organizations to connect with their external stakeholders**
- An exceptional user experience lets businesses collaborate with external stakeholders and maintain Microsoft security.
- IT is involved at the beginning, ensuring a seamless integration, while the business can focus on what really matters – **getting the job done.**

Agenda

- Introductions
- Unstructured Sharing with Microsoft 365
- Teams Shared Channels
- Entra ID B2B, Purview, and SharePoint Premium
- EUM Portals
- Summary, Q&A and Closing

The Hidden Costs of Insecure Sharing

Data Loss

Financial Drain from Shadow IT

Cyber Attacks

Underutilized Microsoft 365 Investments

Process Management Inefficiencies

# The Choices for 'Under the Radar' Sharing are Endless

Why Microsoft 365?

- **It's the place your employees are already working**

- **Users are more likely to use platforms they already understand and trust**

- **Robust security features, with continuous investment in state-of-the-art cybersecurity measures.**

- **Extensive compliance certifications**

What is Unstructured Sharing in Microsoft 365?

- External Sharing in Microsoft 365 strongly supports ad-hoc collaboration

- Unstructured sharing involves sharing documents with a few to a few dozen external people

- Secure Link sharing to sites, libraries, and documents
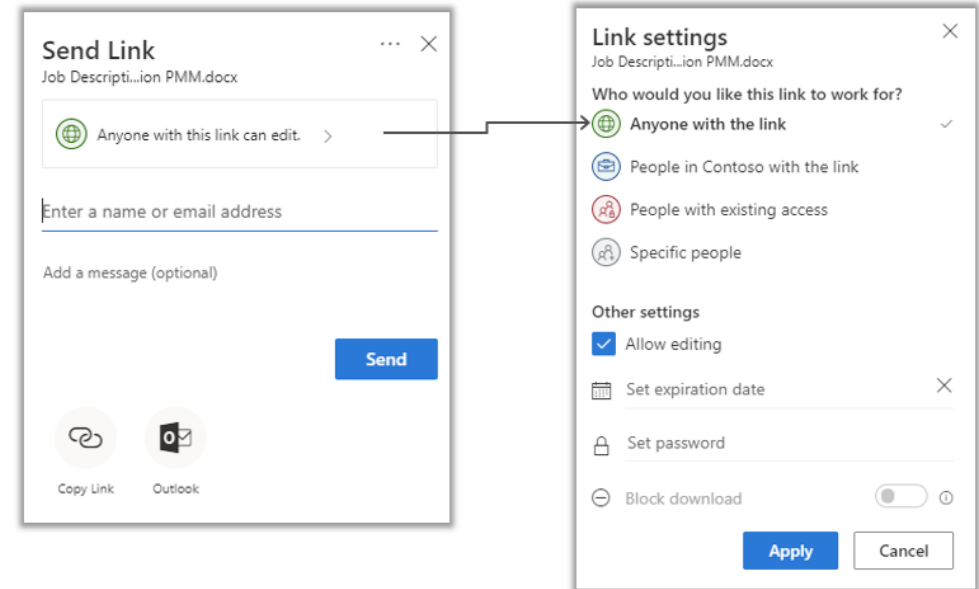
Onboarding External Users through Entra B2B

Microsoft 365 User

- Logs in with their Azure AD credentials
- Seamless experience
- Single sign-on if already signed into Microsoft 365
- Also works for Microsoft accounts

Social User (Google, Meta)

- Federation with Google and Meta accounts now also supported
- Same seamless login experience as Microsoft 365
- Need to be an @gmail.com address for Google Federation

Non-Microsoft 365 Account

- One time passcode
- Emailed at sign-in
- Valid for 30 minutes
- Low friction, no new account to setup or password to remember
- Validates at each sign in that they still own the email address

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
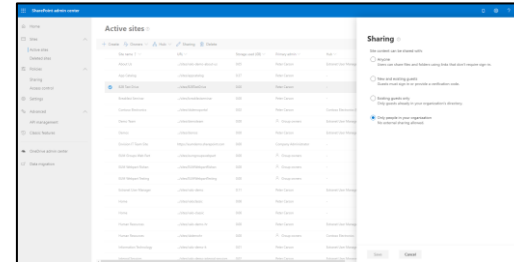- Block externally-shareable edit links
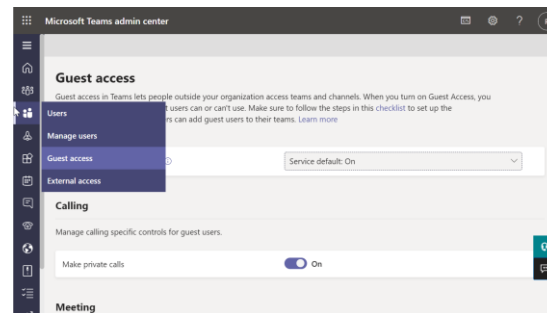- Disabled

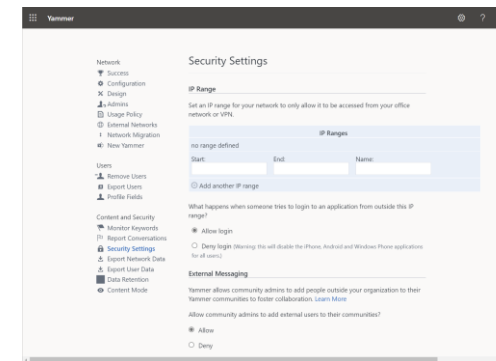# Multiple Places to Configure External Sharing
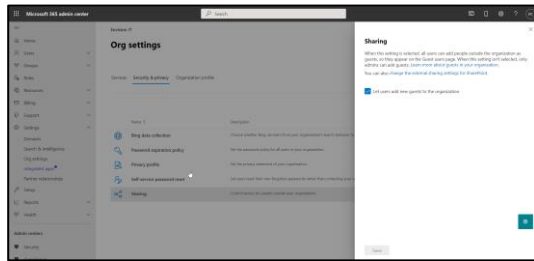
SharePoint Admin

Site Collection Admin

Microsoft 365 Admin

Teams Admin

Yammer Admin

PowerShell

TLP Labels and their Meanings

TLP: Red
Not for disclosure, restricted to participants only.

TLP: Amber+Strict
Limited disclosure, restricted to participants organization.

TLP: Amber
Limited disclosure, restricted to participants organization and clients.

TLP: Green
Limited disclosure, restricted to the community.

TLP: Clear
Disclosure is not limited.
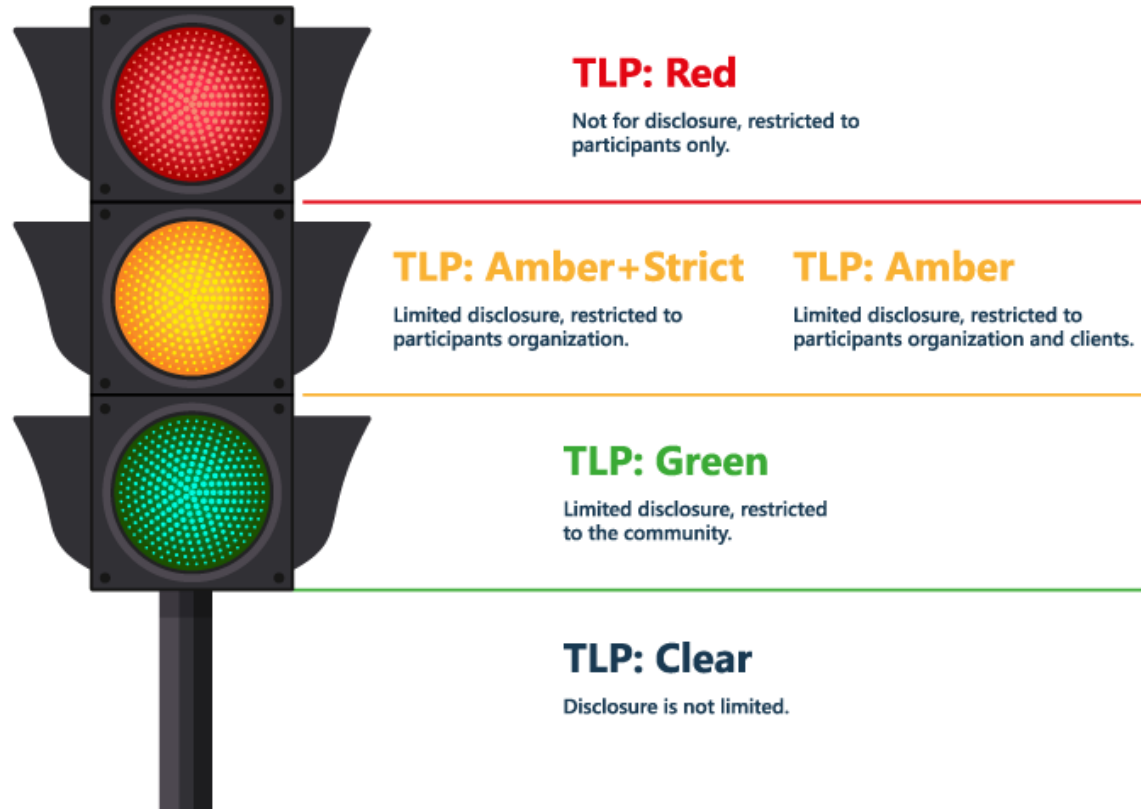
- **Red:** Most sensitive information; requires MFA and document encryption

- **Amber:** Sensitive information; external sharing allowed with MFA

- **Green:** Less sensitive; accessible to guests without MFA

- **Clear:** Public information; accessible without restrictions

Microsoft 365 Tools for Unstructured Sharing

Request Files with OneDrive for Business

- Ask colleagues and external users to upload files to a folder

- Uploaders can only see their own content

Shareable Links in SharePoint Online

- Enable edit and/or read access to colleagues or external users

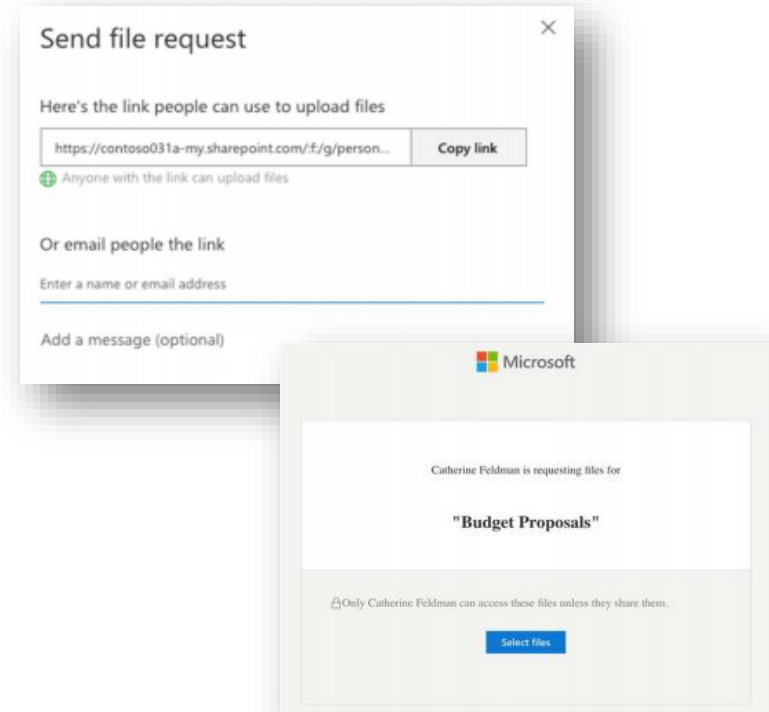- Can modify granularity of access

Teams Guests

- Invite guests into your Team to communicate and collaborate

Teams Shared Channels

- Connect users from a trusted organization to join your channel as if it is in their own tenant

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

- Branding of request pages announced in the Microsoft roadmap

Send file request

Here's the link people can use to upload files

https://contoso031a-my.sharepoint.com/:f:/g/person... | Copy link

Anyone with the link can upload files

Or email people the link

Enter a name or email address

Add a message (optional)

Microsoft

Catherine Feldman is requesting files for

"Budget Proposals"

Only Catherine Feldman can access these files unless they share them.

Select files

[Enable File Requests in SharePoint or OneDrive - SharePoint in Microsoft 365 | Microsoft Learn](#)

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External Users in Teams

B2B Guests

- User exists in the external Team's Azure AD
- All the B2B controls apply
- Guests need to switch their Teams to the external tenant
  - Lose their home tenant's Teams, notifications, feeds
- Can use different browser profiles for different tenants

B2B Direct Connect

- Needs to be enabled on both tenants
  - More for organization to organization sharing
- No tenant switching
- Shared channels appear with all the home Teams and channels
- Also appear in home activity feed

[How We Use Teams Shared Channels | Extranet User Manager](#)

Types of Teams Channels

	Standard Channel	Private Channel	Shared Channel
Members	Sames as Team	Subset of the Team members	Any members of the tenant or B2B Direct Connect
Teams	Open to all Team members	Visible only to channel members	
SharePoint	Folder in Team Site collection Documents library All team members have access	New site collection specific to the channel and secured to channel members	
Sharing	B2B Guests	B2B Guests	B2B Direct Connect

Shared Channels vs. Private Channels

- Both channel styles create a channel site collection for documents
- Both have Teams restrictions on Apps and features
- **Private Channels** let you invite a subset of the parent Team's members
- **Shared Channels** let you invite anyone allowed in the tenant
- Outbound connections don't have to be setup for internal **Shared Channels**
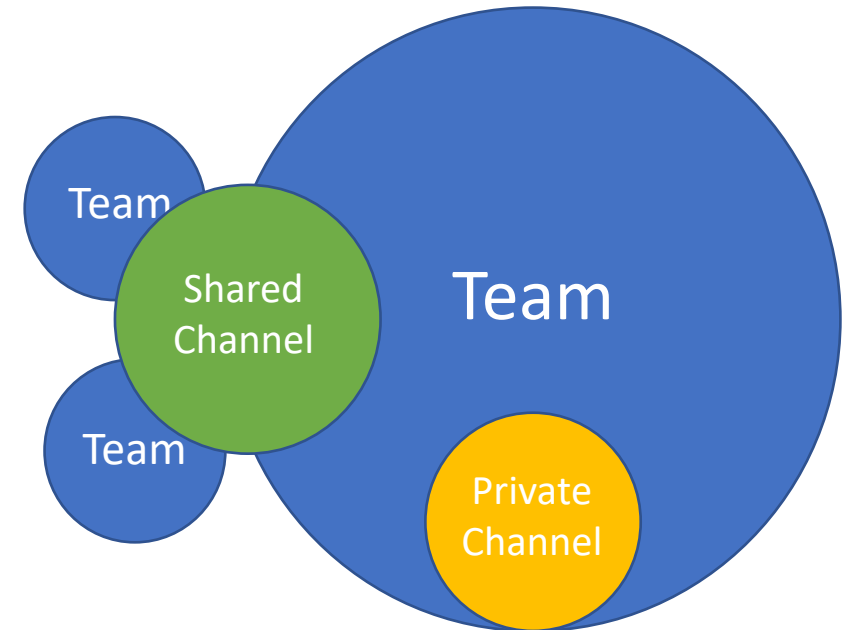
Shared Channel Recap

Great for both internal only and externally shared channels

You cannot share files from the Shared Channel site collection with anyone not in the channel

Do you like the convenience for the external users not having to tenant switch in Teams?

Will 100% of the people you want to invite in belong to an organization your organization can setup B2B Direct Connect with?

Entra ID and Microsoft 365 Licensing

- First 50,000 Monthly Active Users are free for all Entra ID Premium features
    - Minimal costs beyond this
- No licenses needed for guests to access Teams, SharePoint Online, and Viva Engage
- Microsoft 365 Guests do need to be external
    - Can't consider your front line or unlicensed staff to be guests
    - This is what the Microsoft 365 Front-Line Worker F1 and F3 license is for

EUM Portals

Why Build a Microsoft 365 Focused Portal?

Extending Rich Collaboration Functionality Externally

- Microsoft 365 is already the spot you're working and collaborating in
  - SharePoint Online
    - Documents
  - Teams
    - Meetings
    - Recordings
    - Channel conversations
- Leverage the Microsoft 365 Security and Compliance features while hiding the complexity
  - Multi-factor authentication and Conditional Access Policies
  - Microsoft Purview Information Protection
    - Sensitivity Labels
    - Document encryption
    - Data Loss Prevention
- **Stop sharing through email and third party solutions**

Portal Considerations

- How are users invited to the Portal?
    - Invitation Only – Manual or Automated
    - Public Registration
    - Private Registration
- What Portal functionality is required?
    - Secured web content
    - Viewing / Downloading / Uploading documents
    - Co-authoring documents
    - SharePoint Online sites, Teams, or Yammer
    - Third-Party or Internal Applications
- Who is responsible for Portal content and administration?

Types of Portals

Client / Partner / Vendor / Member Portals

Board / Committee Sites

Reporting and Dashboards

Data Rooms

Training Portals

NHS Informatics Merseyside

- Provides digital services and IT support to health and care organisations in the North West of England

- Learning Management System (LMS) for Microsoft 365 that facilitates online training services
  - Learn365 (previously LMS365) – is the LMS designed specifically for Microsoft 365 and available in the NHS shared tenant

- Secure portal for self-registration and automatic learning group assignments
  - Extranet User Manager (EUM) – the secure portal for external collaboration that builds on Azure AD

- Training provided for ~25,000 users

Home > Members > Partner Demo V7

Partner Demo V7

Featured Documents

Communications Plan.docx

Links

SharePoint Online

Partner Portal

Members

Partner Dashboard

Access your current sales pipelines and client analytics

Sales and Marketing Resources

Access co-brandable promotional materials, product documentation, and sales resources here

Partner Support

User our FAQ or submit support tickets here

Logan Guest
VP Sales and Customer Success
Envision IT

Charles Ross
Senior Account Manager |
Solution Specialist
Essential Computing

Peter Carson Dev
President
Envision IT

Peter Carson
President
Envision IT

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Home > Members > Contoso Client Site > Project

Contoso Project 1

Contoso Project 1

Project Name	Contoso Project 1
Status	Active
Project Manager	Maha Elkoshairi
Project Charter	Contoso Project 1 Project Charter
Expected Start Date	6/1/2024
Target Completion Date	6/30/2024

Documents

Document	Modified
📁 Project 1 Sub Folder	2024-06-12, 11:34:35 a.m.
📄 Contoso Project 1 Project Charter.docx	2024-05-29, 10:29:39 p.m.

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Home   Test Ride ▾   PC ▾   ⚙

Committee

Easily manage group members, assign roles, share documents, and set up meetings — all in one place.

Members ✏ ✉ 📋

Jeff Clement
Senior UI/UX Developer
Envision IT

Logan Guest
VP Sales and Customer Success
Envision IT

Peter Carson Demo
President
Envision IT

Joel Stickland
Sales Development Representative
Envision IT

Documents   🕒 Archived

- PDF 02.pdf
- PDF 01.pdf
- PDF 03.pdf
- Meeting Minutes.doc

Upcoming Meetings   ⊞ New Meeting

- July 2024

Past Meetings

- Peter Feedback Session
- January Meeting
- May Meeting
- Webinar Demo

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Document Sharing & Collaboration

eLearning for Partners

Workspace Booking

Discover **'the art of the possible'** in expanding your Microsoft 365 to an external audience.

SharePoint Extranet Services
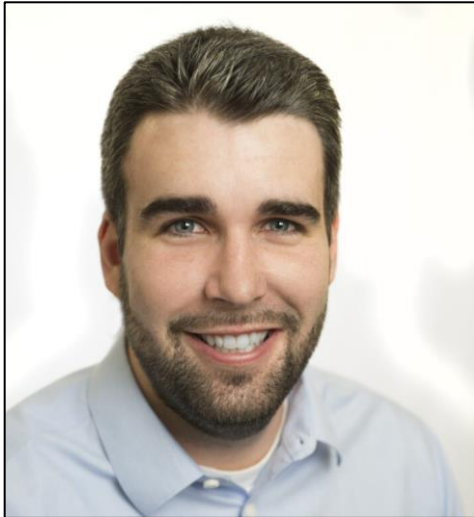
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Do you have unwanted guests?

A free, 30-day trial of a Microsoft 365 reporting tool our IT Manager loves!

- **At a Glance:** See all Guest Users in your tenant:
  - External users
  - Orphaned users
  - Groups with external users
  - Ghost guest users
- See something risky? **Take remedial action 'in line'!**
  - E.g., remove inactive users, deactivate old sharing links..

Learn how your business can benefit from structured sharing

Logan Guest
VP Sales & Customer Success
Extranet User Manager

Ross Moorhead
Sales Manager
Essential Computing

Charles Ross
Account Manager &
Solution Specialist
Essential Computing

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4 Key Takeaways

1. External sharing happens with or without IT support

2. Microsoft 365 is far more secure than email or shadow IT

3. There are plenty of configuration options

4. Putting the right controls in place is a balance

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Additional Resources

[EUM Data Room: Confidential Document Exchange Made Simple, Efficient and Secure with Microsoft 365](#)

[Mastering Secure External Sharing in Microsoft 365: A Comprehensive Guide for Structured & Unstructured Sharing](#)

Thank you!

Any Questions?