Operations Guide for user managers

external365

Contents

Overview

This document serves as an overview and general instruction manual on how to manage users with the application known as external365.

[External365](#) simplifies the management of external user accounts in Microsoft 365, making it easy to share content and users granted access to a company's SharePoint online site, but are not licensed within that organization. Please follow to [Managing external users in Microsoft Office 365 to find what External365 is.](#)

External365 is designed to operate from within the Microsoft Azure cloud and leverages Microsoft Azure specific technologies (e.g. queues, storage, app services, etc.). It cannot operate from another cloud vendor, nor can it operate from a stand-alone service platform. The external365 application is a multitenant host that can provision any number of discrete Office 365 tenants while maintaining secure separation of services between them.

The external365 application has been installed in the Azure tenant created specifically to host it. Access to that tenant is managed by administrative persons from Immersion Technology Services.

Main screen

User operations can be accomplished by tenant user operators and tenant administrators. These operations include the ability to find, create, update, delete, and disable user accounts in the connected Office 365 directory.

User operations all start on external365 User Management page.
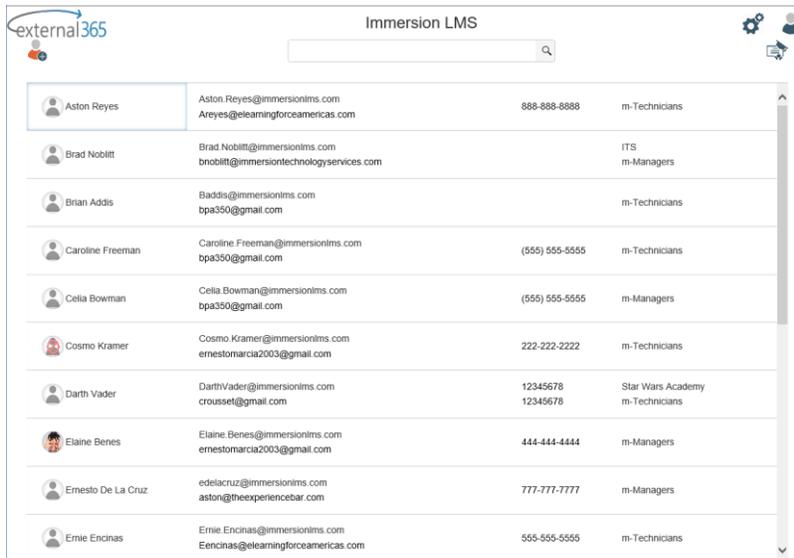
The screen may look a little different for each user, depending on their permissions (administrator or operator), culture settings and grid layout.

Icon	Function
	Create a new user
	Bulk create users with an import file (csv)
	Navigate to different administration screens to configure the application
	Access your profile information and personal configuration settings

Create an external user

To create a new user:

- Click on ![icon] from the main user list. The following dialog will appear:
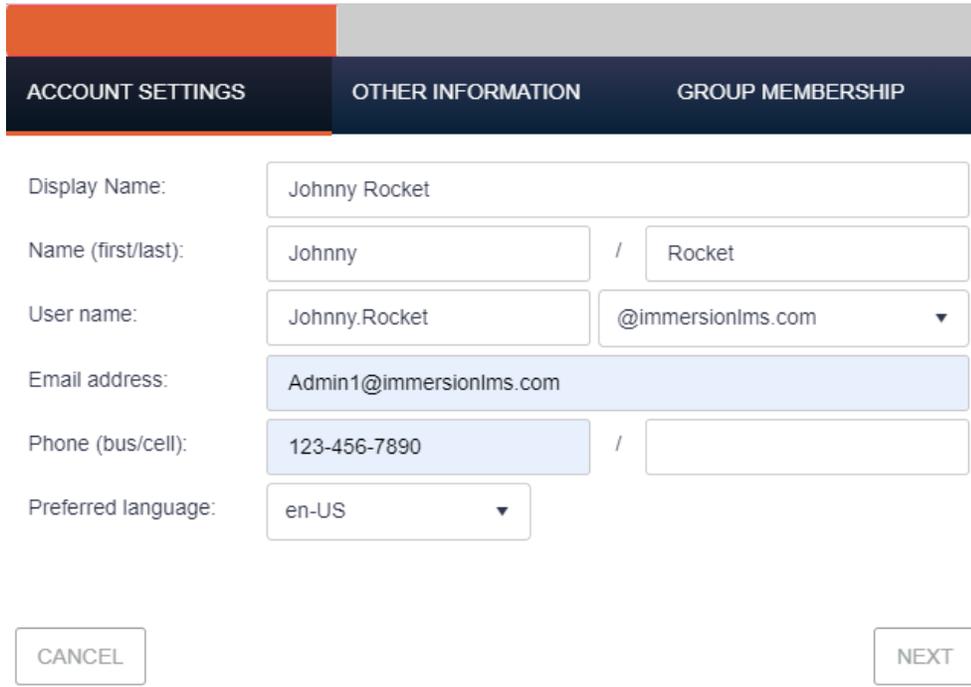
Please note that screen may look different and have different fields depending on configuration settings.

- Enter Account Settings fields and click the **Next** button to enter additional information.

Field name	Instructions
Display name	Enter the display name of the new Azure user. This is what the user will see when they login to Office 365. Display name may be completely different than the users real name if needed.
First name	Enter the first name of new Azure user.
Last name	Enter the last name of new Azure user.

Username	Enter username the user will need to use to login to your Office 365 tenant.
	- You may enter some text in the text box. Please note: we recommend defining standards for username to be used by all user managers (e.g. FirstNameLastName or FirstInitialLastname)
	- Specify the domain to assign the user from the drop down. Multiple domains are supported provided that the application has been configured for multiple domains. Please note: the new user will need to specify the fully qualified domain specified i.e. Username@Domain.com. **The login username CANNOT be the user's email address**
Email address	Specify the user's personal email address that will be used to receive automated notification from external365, SharePoint online, and LMS365 Cloud.
Phone number (bus)	Provide the user's primary business phone number.
Phone number (cell)	Provide the user's cell phone number.
Preferred language	Enter user's preferred language. The notification sent to learner will be based on their preferred language.

Enter additional information and click Next button to enter group membership.

Field name	Instructions
Display name	Enter the display name of the new Azure user. This is what the user will see when they login to Office 365. Display name may be completely different than the users real name if needed.
Company	Enter the user's company
Manager	Type in the user's manager. The manager needs to be a user that has already been created (internal or external). The field is type ahead so type in the first letters of managers first name and application will provide list of matched users. Managers have specific permissions within Office 365 and will be considered as the user's first line manager. In applications such as LMS365 Cloud this is heavily used for approvals, reporting rights, etc.
Department	Enter the user's department
Title	Enter the user's Title (e.g. contractor, analyst, CEO, etc.)

View	Choose a view/group that the user needs to be part.
	By selecting a view, this tells the application who else can also see and manage this user in external365.
	For example, let's say you have:
	- Two views: Marketing and IT
	- 3 user managers: John, David, and Jane
	o John is scoped to manage users of both views
	o David can only create and manage users in Marketing
	o Jane can only create and manage users in IT
	- John is creating a new user and selects IT:
	o John and Jane will be able to see and manage the user
	o David will not even know the user exists

NOTE: Available groups are configured in the Control Panel under the Tenant Configuration "Groups" section.

NOTE: Select the group from Available Groups section and click on arrow to add to Selected Groups. This will allow you to add user to select group membership.

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General   Settings   Provisioning Defaults   Mail Settings   Groups   Tenant   ▶

| search groups |

Domain Groups   **Available**

AstonsOtherScope2   ▲   External users
ACC Volunteers   LMS365TestLearners
Audit Department
LMS365 Trainers
LMS365 Managers
TestGroup0606
PCR Volunteer
ASTONSMOARSCOPES   ▼

▶
▶▶
◀
◀◀

Disable   Ok   Cancel   Apply

Import or export users

To import or export users, click on from the main user list. The following dialog is displayed:

Import / batch create user

For performance reasons, the bulk import tool is limited to 50 records at a time:

1. Click on **Select CSV file** button
2. Browse for the CSV file that contains the user information to import
3. Click on **Upload**

The CSV file must contain the following columns and headers:

Column name	Field mapping	Format	Required	Comments
Action	N/A	Text	Yes	Create, Update or Delete
UserPrincipalName	Username	Username@domain.com	Yes	Login name
EmailAddress	Email address	recipient@emaildomain.com	Yes	
FirstName	First name	Text	No	
LastName	Last name	Text	No	
DisplayName	Display name	Text	No	

TelephoneNumber	Business phone number	Number	No	
MobilePhoneNumber	Mobile phone number	Number	No	
Manager	User's manager	Username@domain.com	No	Must be previously created account
PreferredLanguage	User's preferred language	ISO language code	No	
Department	User's department	Text	No	
Office	User's company	Text	No	
Title	User's official title	Text	No	
Scope	View	Text	Yes	Can be left blank if scoping is not activated
Password	None	Text	No	
Groups	Groups	Text	No	If multiple groups, separate with a semicolon (;)

Search for users

The search bar allows the operator to locate user with specific names or roles, the search will find an exact match:

- If you append an ***** to your text, it will execute a "starts with" search
- A special search for a **-** will find disabled users
- A search for **~** will find users who are pending completion of their provisioning process

Update an existing user information

To update a single user's profile information, either:

- Scroll through the list and double click on the user you would like to edit
  OR
- Use the search to find the user and then double click on it
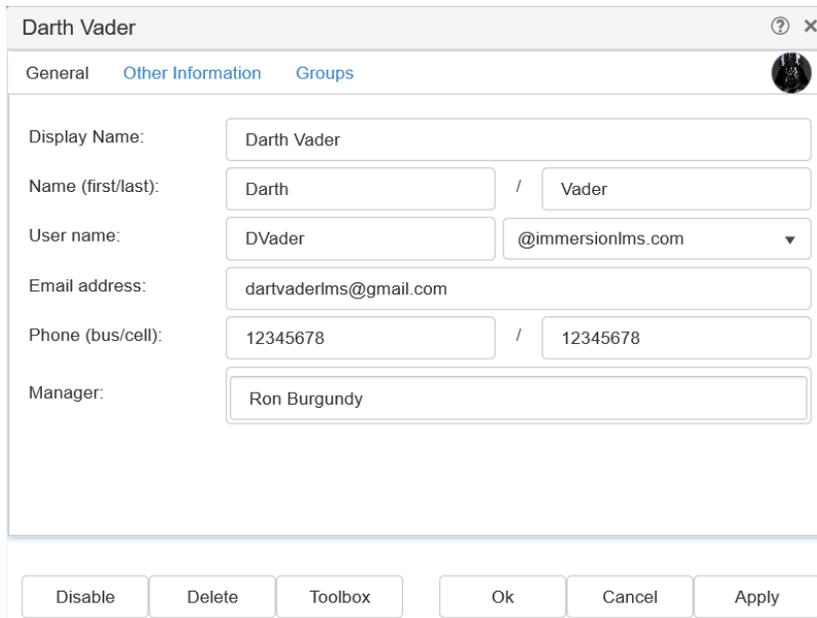
In either case the user's profile is displayed where you can edit any of the fields you specified during the user creation process. The user profile information is organized under three tabs:

- **General**: Display Name, Name (first/last), Username, Email address, Phone (business and cell phone numbers) and manager
- **Other information**: Company, Department, Title, View identifier (role) and Preferred language
- **Groups**: update user AAD and Office 365 group memberships

Create a profile picture for user

From the edit screen you may also upload a profile picture to associate to the user that will be displayed throughout your Office 365 tenant for that user. To do so click on the user icon at the top right of the screen:
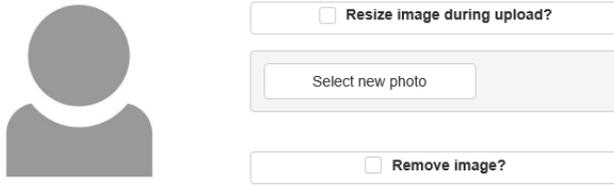
Disable a single user

From this same screen you may disable a user. Disabling a user is a very useful feature if you would like to keep the user's account but would like to block the user from signing for a period of time.

To disable a user, just click on the **Disable** button. Once disabled a user will be represented in the user list with .

Tip: *To find all disabled users in the user list, enter – in the search bar from the main user list screen.*
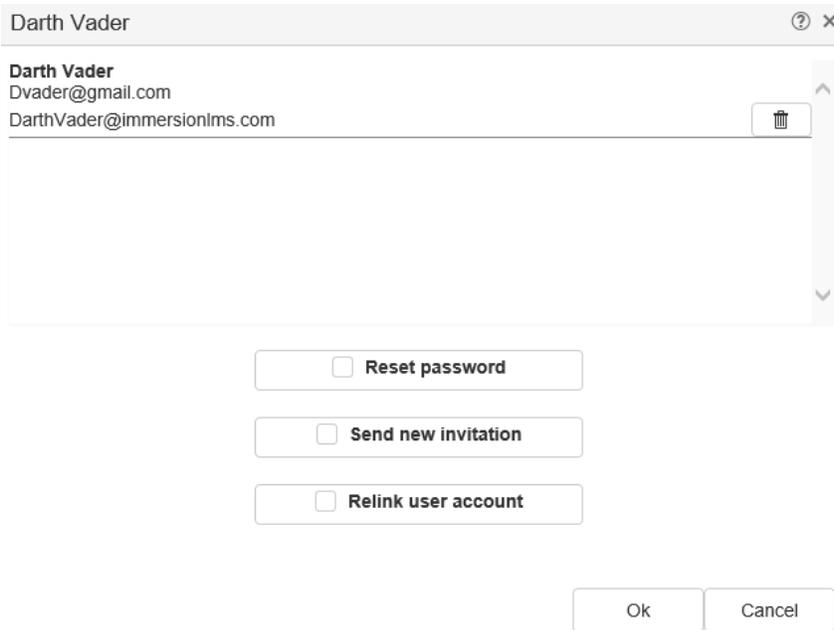
Delete a single user

To delete a user, just click on the **Delete** button from this screen. When you delete a user, the account is effectively removed, and the user will not exist anymore.

When deleted, the user account will be placed in a recycle bin for 30 days. To reinstate an account that has been deleted, please contact your Office 365 tenant administrator. Past 30 days, there is no way to retrieve the account.

Tip: *If you are not sure if an account should be deleted or disabled, it is always safer to disable an account until you are positive the user account should be effectively deleted.*
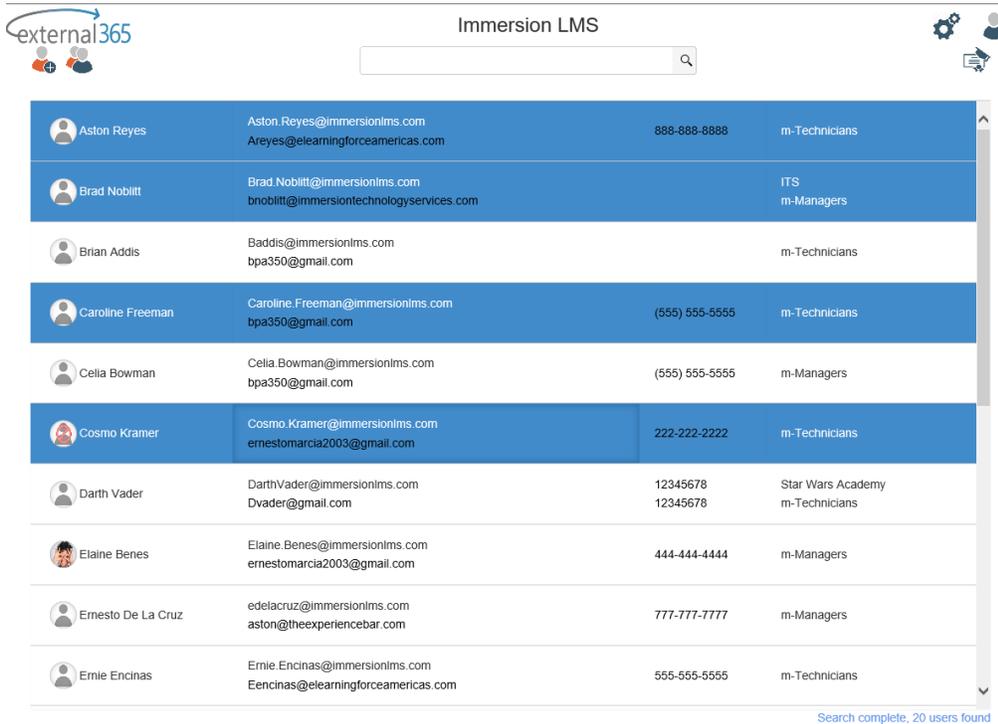
Other single user functions

When editing a single user, you have additional options available by clicking on the **Toolbox** button

Darth Vader ⑦ ✕

Darth Vader
Dvader@gmail.com
DarthVader@immersionlms.com   🗑

☐ Reset password

☐ Send new invitation

☐ Relink user account

Ok   Cancel

Option	Definition
🗑	Delete the account
Reset password	Resets the user password; an automated email will be notifying the user their password has been reset and provide a new temporary password
Send new invitation	Sends the user a new email notification inviting the user to your Office 365 tenant with a predefined welcome message, user name, and temporary password
Relink user account	It can sometimes happen that the user account is not properly linked to the user's SharePoint user profile. This is not dependent on external365 application and is due to factors within the Office 365 tenant. If this happens, just use this feature to relink the profile information with the SharePoint user profile information.

Update multiple profiles

You may update multiple profiles at the same time. To do so, hold down the **Ctrl** key on your keyboard and individually select multiple users. When you do this, the multiple user edit icon ( ) appears as illustrated below:

Click on the icon to open the user tools dialog:

User Tools   ⑦ ✕

Cosmo Kramer
ernestomarcia2003@gmail.com

Cosmo.Kramer@immersionlms.com   🗑

Darth Vader
dartvaderlms@gmail.com

DVader@immersionlms.com   🗑

Fred Flintstone
bpa350@gmail.com

fred.flintstone@immersionlms.com   🗑

George Constanza

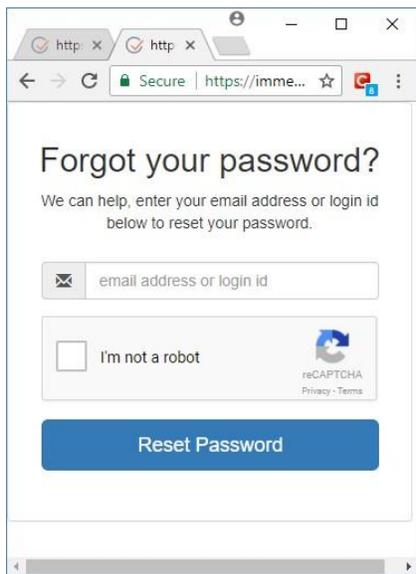| ☐ **Reset password(s)**	☐ **Disable user(s)**
☐ **Send new invitation(s)**	☐ **Enable user(s)**
☐ **Relink user account(s)**	☐ **Delete user(s)**
☐ **Add user(s) to group)**	

Ok   Cancel

From here you may:

- Reset the group of users' passwords
- Resend a new invitation email
- Relink the users' accounts
- Add users to AAD or Office 365 groups
- Disable all the users
- Enable all the users
- Delete all user account

Self-service password reset

Any existing external user may request a password reset for an account by visiting the /passwordreset endpoint for a tenant.

For example, the password reset endpoint for a fictitious *Contoso* tenant would be https://contoso.external365.com/passwordreset.

Tip: *We recommend placing this URL on your external facing website with instructions so you external users can easily reset their password in case they forgot it.*

When the password reset is initiated, an email notification containing a temporary password is sent to the user. Once submitted, the password reset request will expire within 20 minutes after submission. If the user receiving the notification did not make the request or no longer desires the password reset, they can simply ignore the notification.