Microsoft Teams, Office 365 Groups, and SharePoint Sites Provisioning

Friday, December 13, 2019

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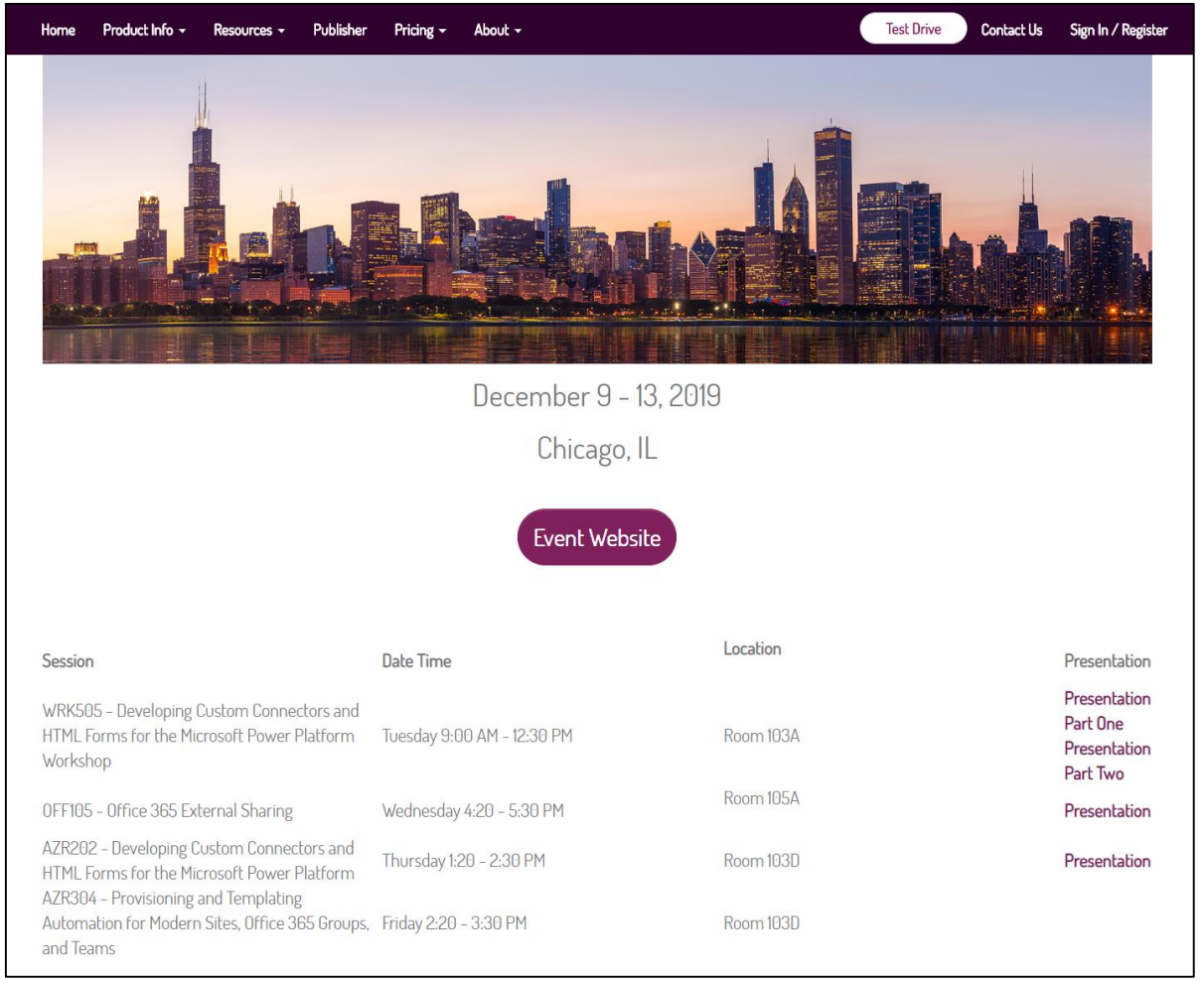
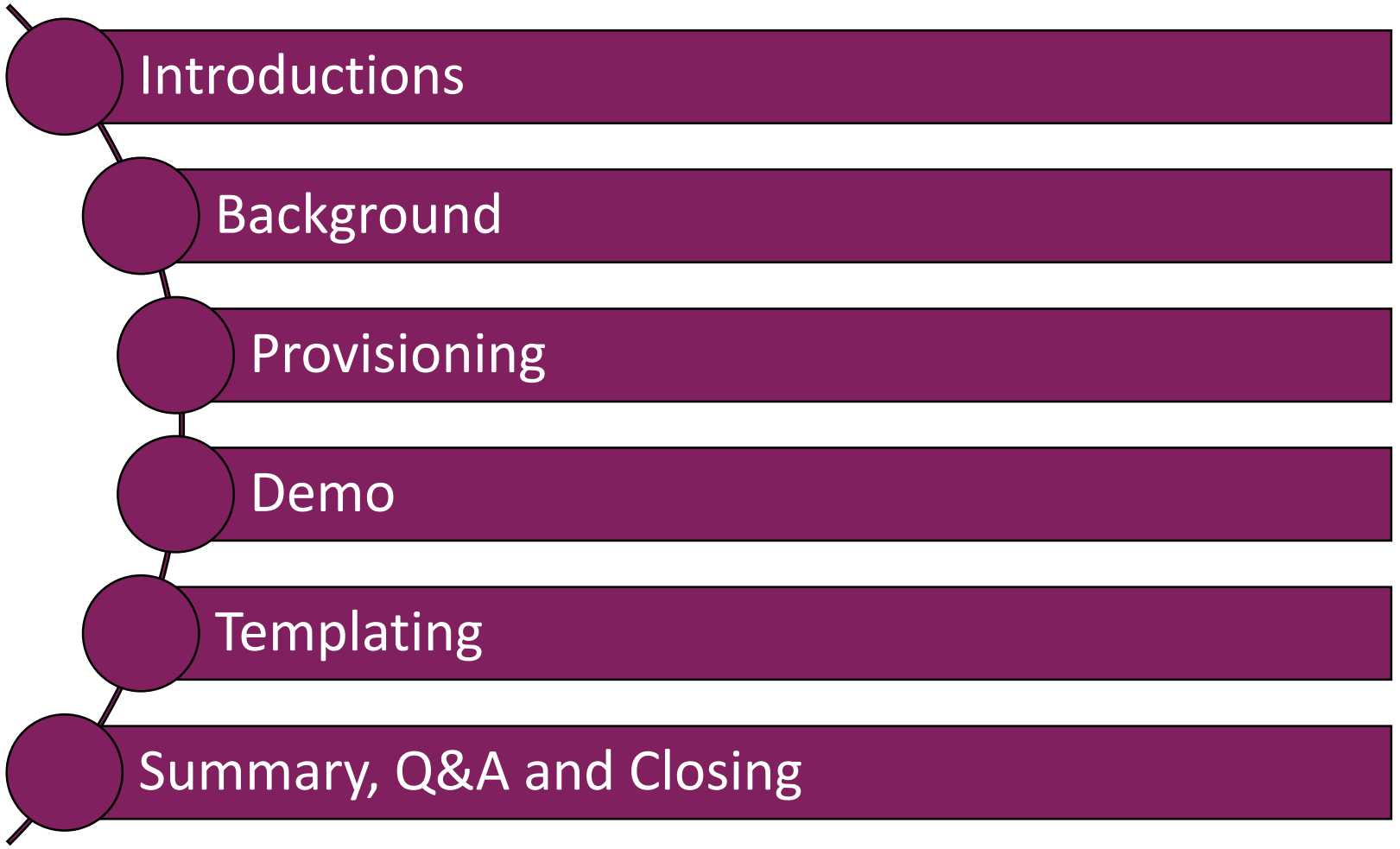
- www.extranetusermanager.com
- Twitter @carsonpeter
- President Toronto SharePoint User Group

http://eum.co/resources/events



Agenda


Introductions
Background
Provisioning
Demo
Templating
Summary, Q&A and Closing

Poll – Which do you use today?

Office 365

SharePoint On Premises

Microsoft Flow

Azure Automation

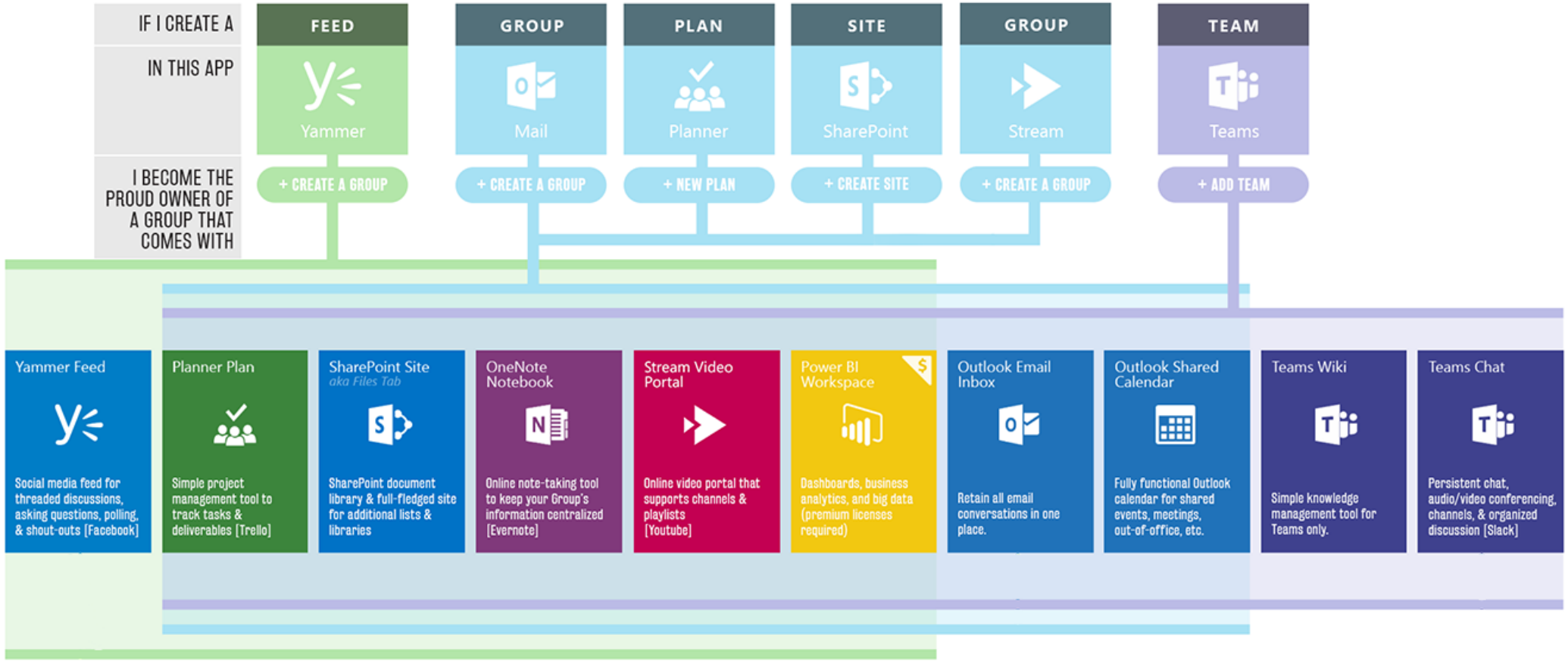
Microsoft PnP (Patterns and Practices)

Microsoft Teams

- **Replacing functionality of Skype for Business:**
  - Persistent chat
  - Presence
  - Audio and video calls
  - Online meetings and sharing
  - Files (SharePoint)
- **Org wide channel eliminates need for Yammer for most organizations**
- **Microsoft has positioned Teams as the launchpad to O365 services**
- **Each Team is connected to an O365 Group**

https://products.office.com/en-us/microsoft-teams/group-chat-software

Office 365 Groups



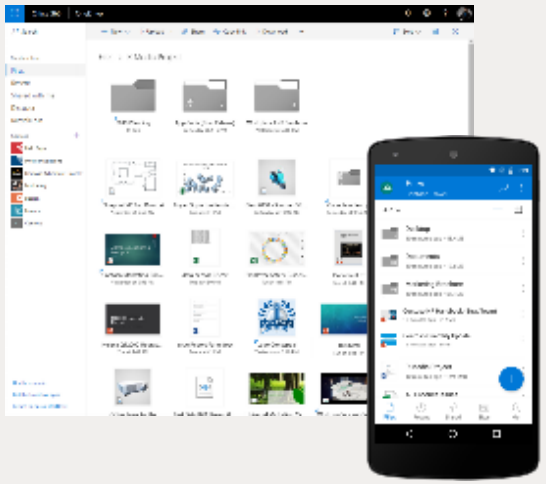
Matt Wade - http://icansharepoint.com/everyday-guide-office-365-groups/

SharePoint Online

- Communicate and Collaborate
- Corporate Intranet
- Team Sites
- Forms and Workflows

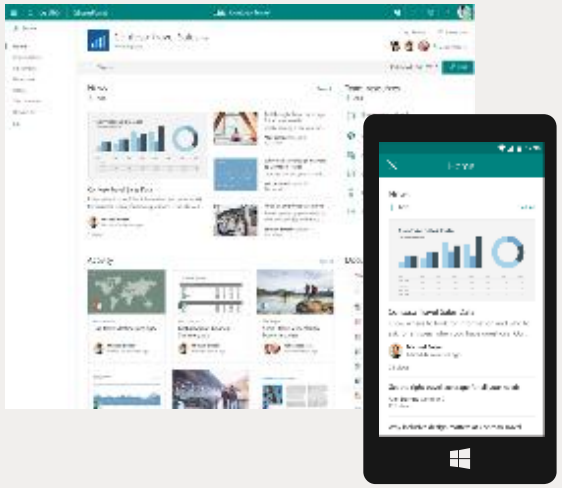
Three places to work

Personal files



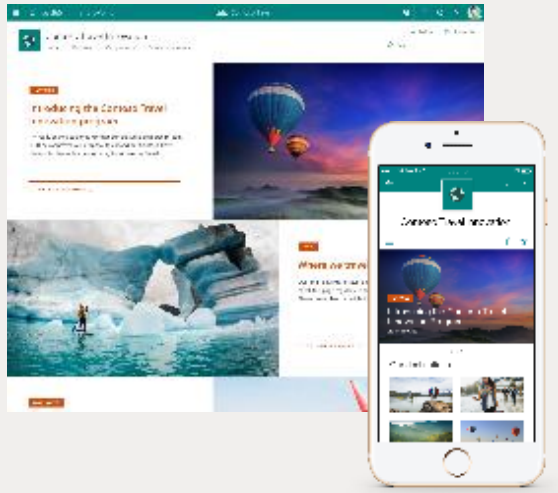
Private by default

Team sites



Share content with your group

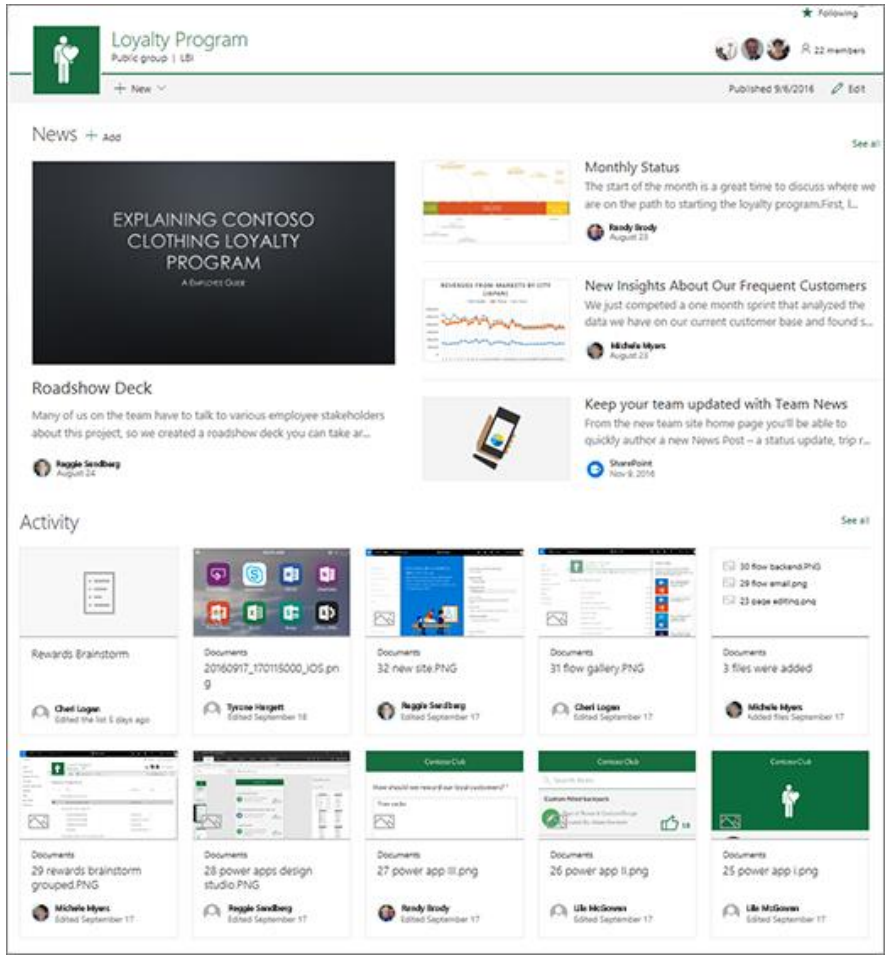
Communication sites



Inform and engage a broader audience

SharePoint – Team Sites

- By default, all members are content authors
- Department, Committee, or Project Collaboration
- External Sharing with Clients, Vendors, or Partners
- Collaboration-focused



Project Sites

Project Management Site Wish List circa 2015

- **Exchange email and calendar support**
- **OneNote for ad-hoc note taking**
- **Full SharePoint document libraries**
- **Custom lists**
  - Tasks, Issues, Risks, Decisions
  - Top level Client and Project lists
- **Sharing with External Users**
- **External systems**
  - Financial, time tracking, bug tracking

Current Project Management Wish List

- **Microsoft Teams for project member communication**
- **Templated SharePoint Team Site**
  - Full SharePoint document libraries
  - Custom lists - Tasks, Issues, Risks, Decisions
  - Sharing with External Users
- **OneNote for ad-hoc note taking**
- **Planner for simple task management**
- **Stream for conference call recordings**
- **Exchange email and calendar support for external communication**
- **External systems**
  - Financial, time tracking, bug tracking

Notebook/OneNote

- **Tool for unstructured, free-form note taking**
- **Create Sections and Pages**
- **Add text, images, audio, video, hyperlinks, etc…**
  - Embeded Video cannot be added in OneNote Online, but once embedded can be played in OneNote Online
- **Can be opened in OneNote application and synchronized**
- **Multiple people can edit the same notebook simultaneously**

https://products.office.com/en-us/onenote/digital-note-taking-app

Planner

- **Simple task management tool**
- **Plan is created with each Office 365 Group**
  - Conversely, an Office 365 Group will be created for each Plan
  - If either is deleted, both are deleted
  - Additional Plans can be created for a Group
- **Plans consist of Buckets and Tasks**
- **Tasks may be assigned, contain checklists, due dates, attachments, description and comments**

https://products.office.com/en-us/business/task-management-software

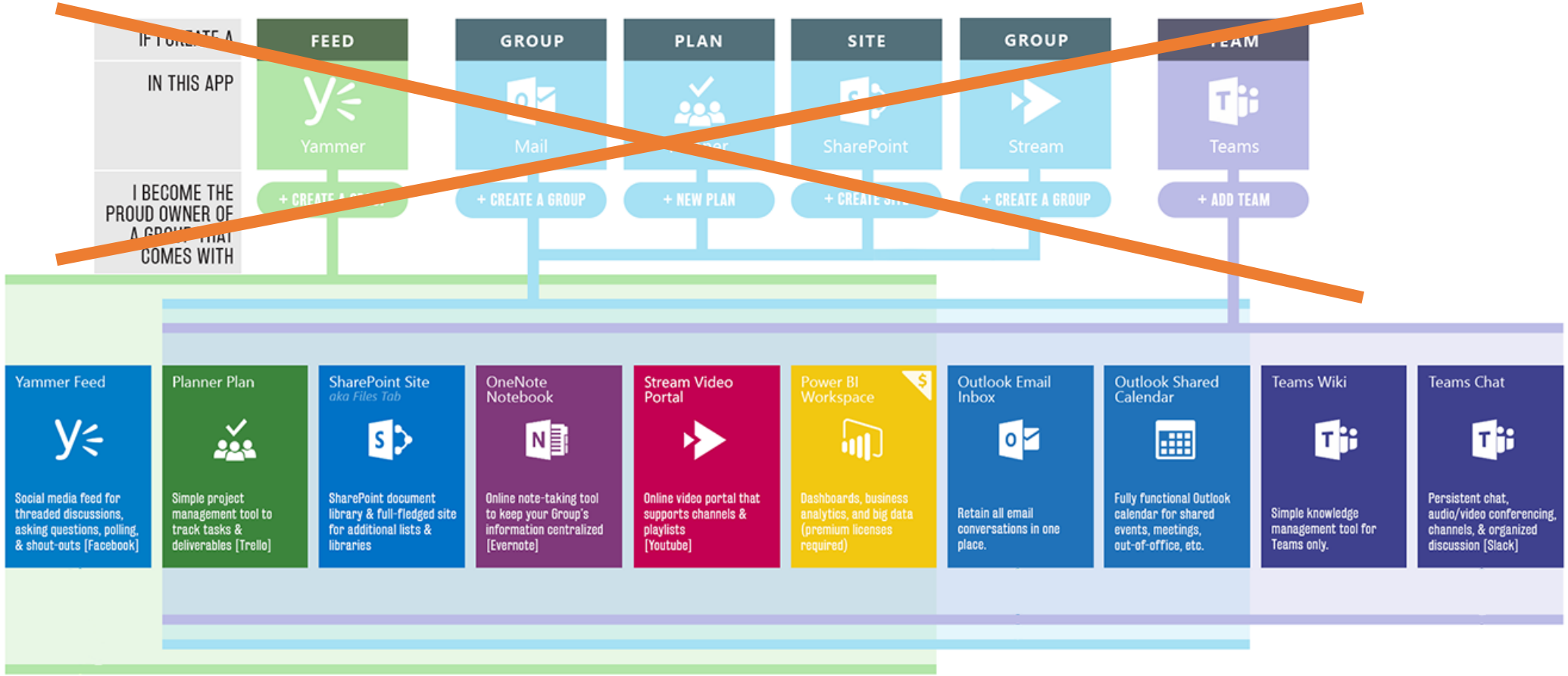
Stream

- Live and on-demand events in Office 365
- Teams puts recordings into Stream automatically
- Groups and Channels
- Speech to text, auto-generated closed captions, and face detection features

https://products.office.com/en-ca/microsoft-stream

Provisioning Teams Office 365 Groups and SharePoint Sites

Office 365 Groups



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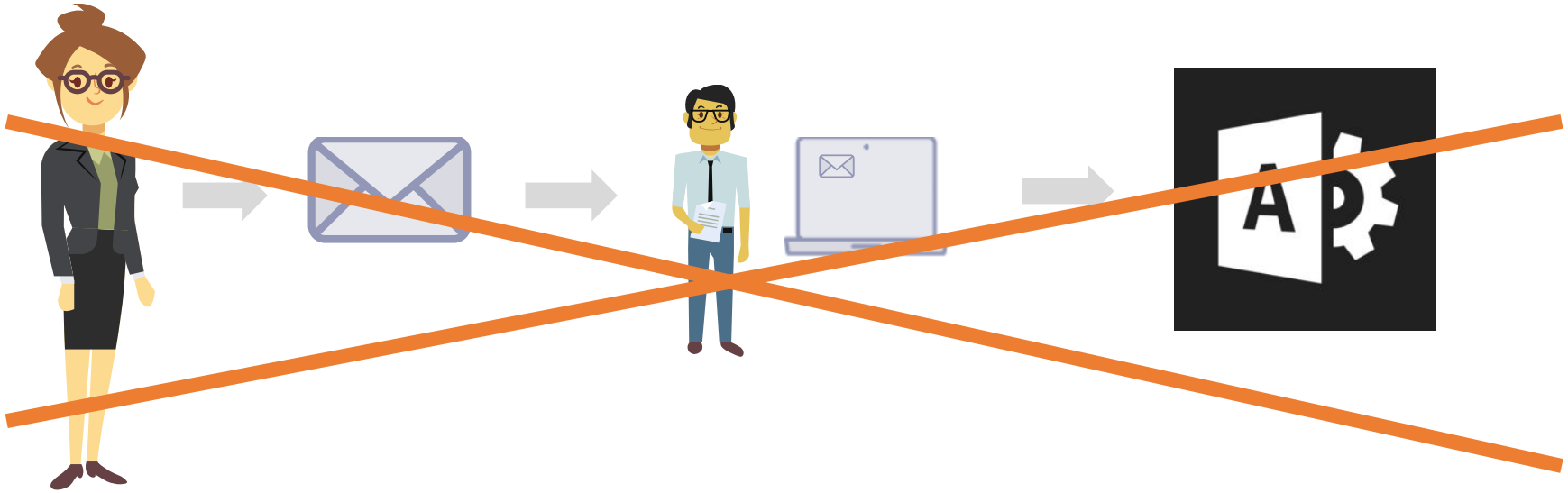
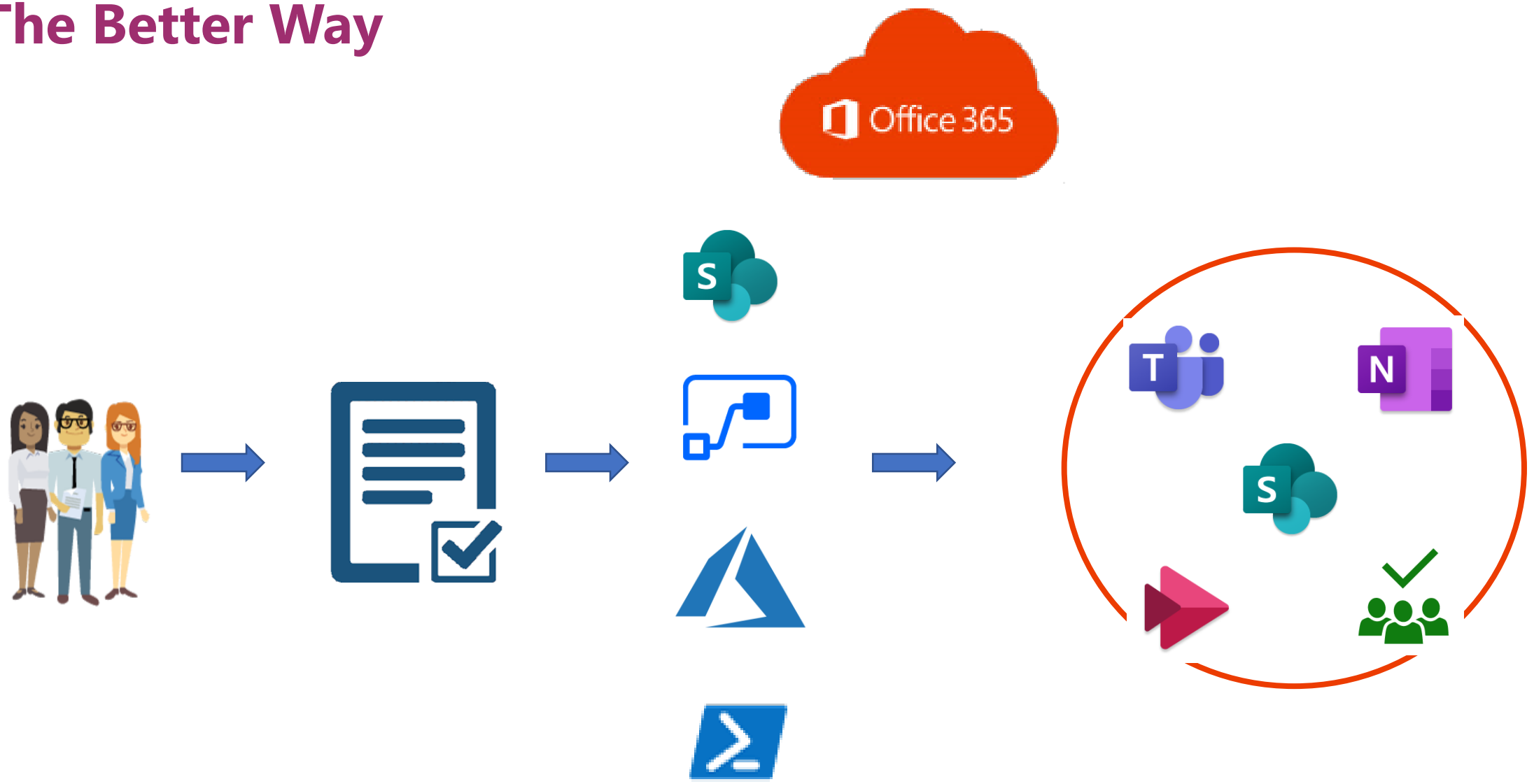
Manual IT Provisioning

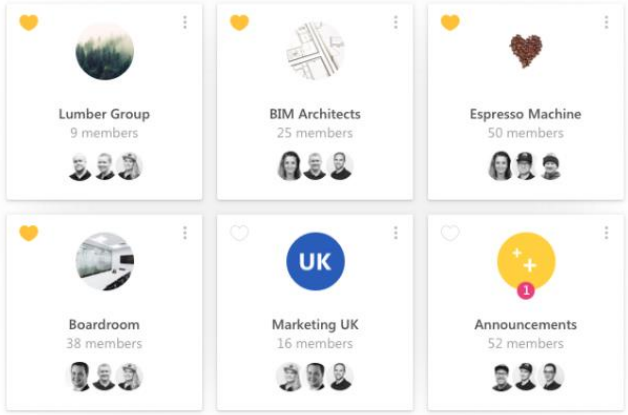


The Better Way



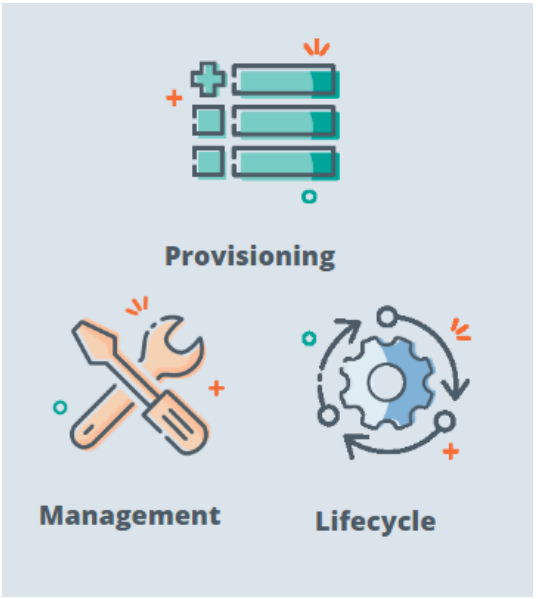
Third Party Alternatives

Valo Teamwork



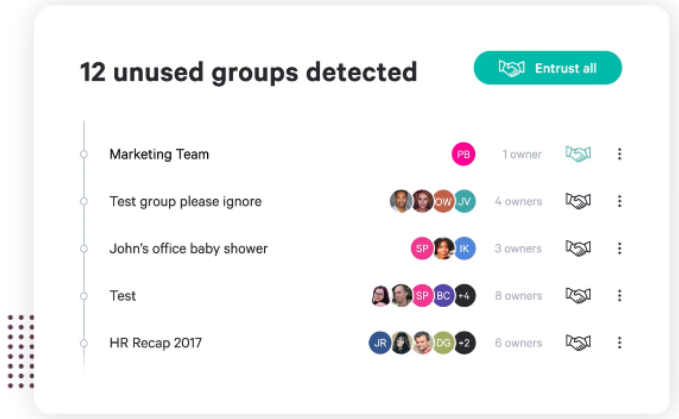
https://www.valointranet.com/teamwork/

AvePoint CLOUD GOVERNANCE



https://www.avepoint.com/products/cloud/office-365-governance/

SG:Apricot

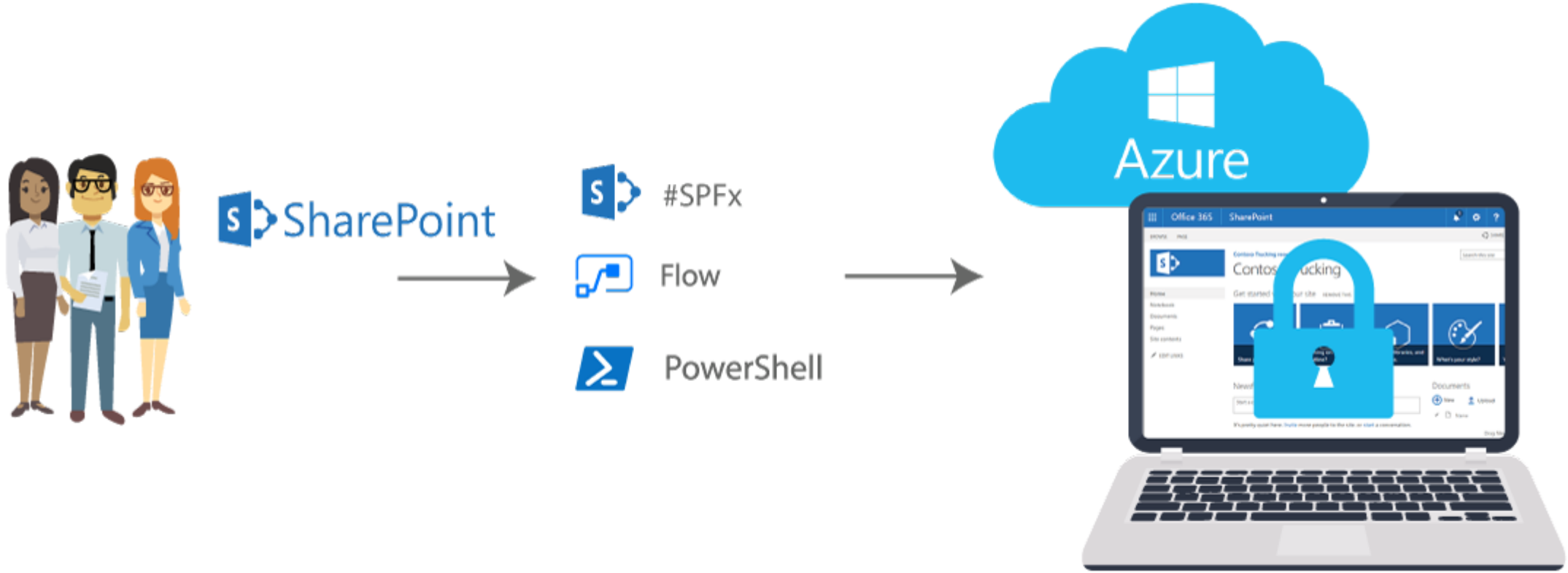


https://sharegate.com/products/sharegate-apricot

Solution Requirements

- Self service form for end users
- Approvals if required
- Easily extensible and customizable for each organization's requirements
- Leverage out of the box and customized site templates
- Support for Modern sites, Office 365 Groups, and Microsoft Teams
- No Visual Studio or compiled code needed. PowerShell and configuration that IT Pros can get their heads around

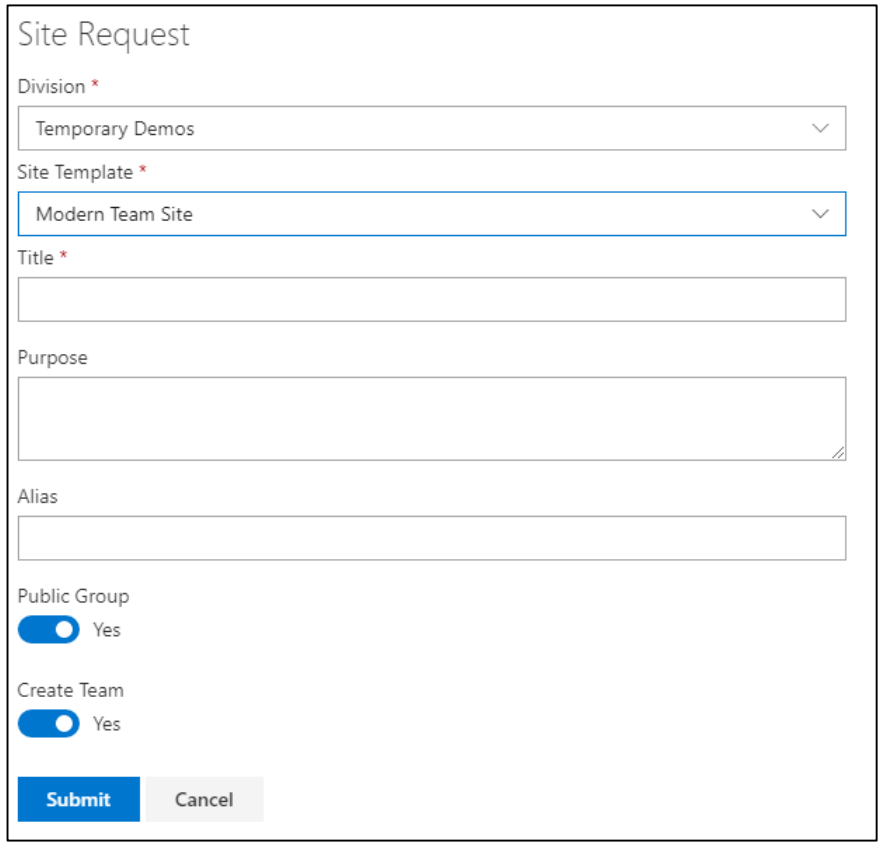
Supporting Technologies



Solution Overview

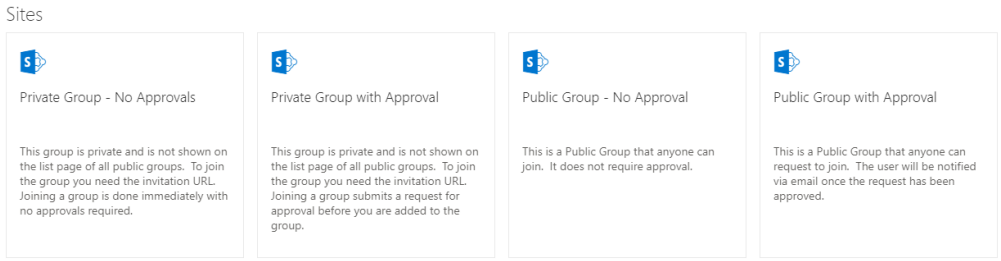
- SharePoint list is used to track existing sites and new site requests
- SPFx webpart form used to enter requests
- Microsoft Flow is triggered when new requests are added
- Approval workflow can be part of this
- Azure Automation is used to run the PowerShell scripts and create the SharePoint site, Microsoft Team, EUM Group, and wire everything together

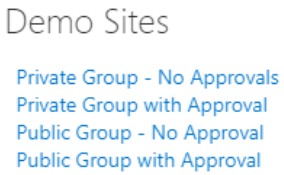
Site Request Form



- Supports multiple different site templates
- Form fields are dynamically generated based on template content types
- Easy to add or change fields on the form – no programming required

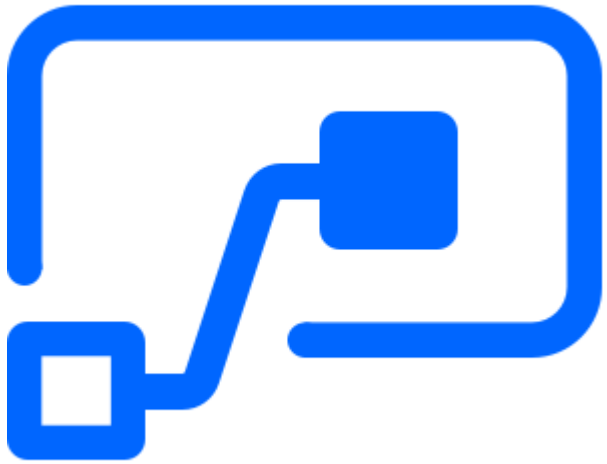
Sites List Web Part





- **Displays Sites from the Sites list**
- **Filters down to sites under a Parent URL**
- **Different views**
  - Tile
  - List
  - A – Z List

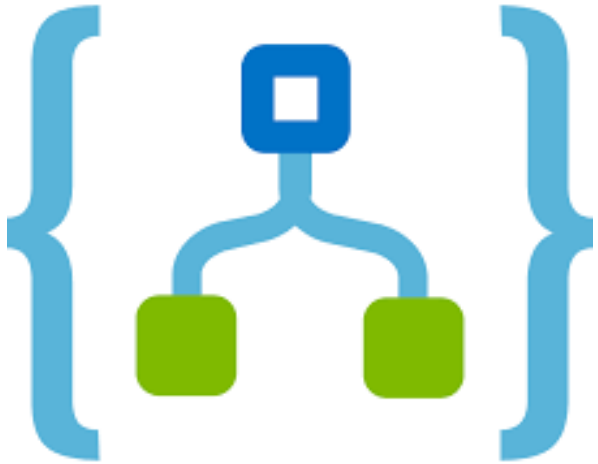
Power Automate (Flow)



- **Create automated workflows between your favorite apps and services**
- **Get notifications, synchronize files, collect data, and more**
- **Connect Triggers with Actions**
- **Supports both Microsoft and third party apps**
- **Standard connectors used in this solution**
  - SharePoint Online
  - Approvals
  - Azure Automation
  - Office 365 Outlook
- **Custom connectors can connect to any system**
  - EUM

https://flow.microsoft.com/en-us/

Azure Logic Apps



- **Platform underneath Power Automate**
- **Same designer**
- **Slightly different set of actions**
  - No pre-built approval
- **Visual Studio integration**

https://azure.microsoft.com/en-ca/services/logic-apps/

Power Automate vs. Logic Apps

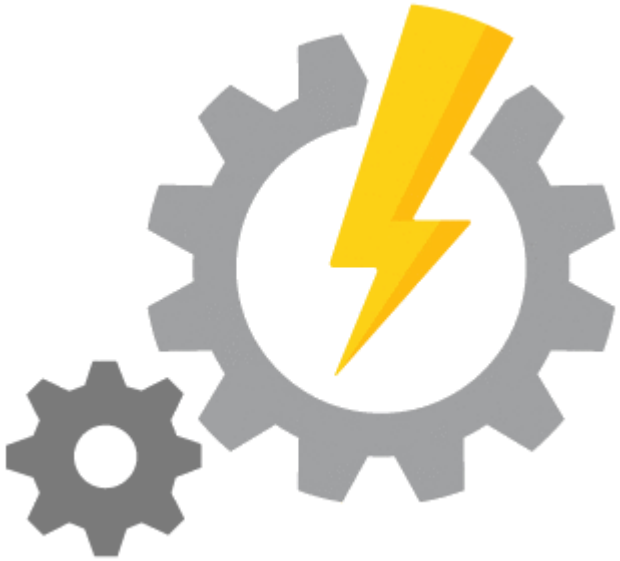
Power Automate

- Simpler for citizen developers
- Using standard connectors leverages built-in Office 365 licensing
- Premium and custom connectors need premium licensing
- https://flow.microsoft.com/en-us/pricing/

Logic Apps

- Azure portal and Visual Studio and be daunting
- Uses the same connectors
- Pay per action executed can be much cheaper
- https://azure.microsoft.com/en-us/pricing/details/logic-apps/

Azure Automation



- **Run PowerShell scripts in the cloud**
- **No management of the VM needed, Azure takes care of that**
- **Very cost effective**
  - 500 minutes of runtime included free per month
  - $.002/minute USD after that

https://azure.microsoft.com/en-ca/services/automation

SharePoint Patterns and Practices

- Code samples
- Reusable components and solutions
- Guidance documentation
- Monthly community calls
- Case Studies

- SharePoint Framework
- SharePoint add-ins
- Microsoft Graph, Office 365 APIs etc.
- Remote provisioning and client side development

http://aka.ms/SharePointPnP

PnP Provisioning Engine

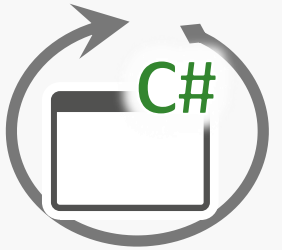
Part of the SharePoint PnP initiative deliverables

- Open source, community-driven

Released originally spring 2015

Can be used using managed code or with PnP PowerShell

Extract templates from existing sites and optional serialization



Available as NuGet package for code and also from PnP PowerShell

Connectors

Connectors to store templates and potentially assets to file system, SharePoint or Azure storage.

JSON

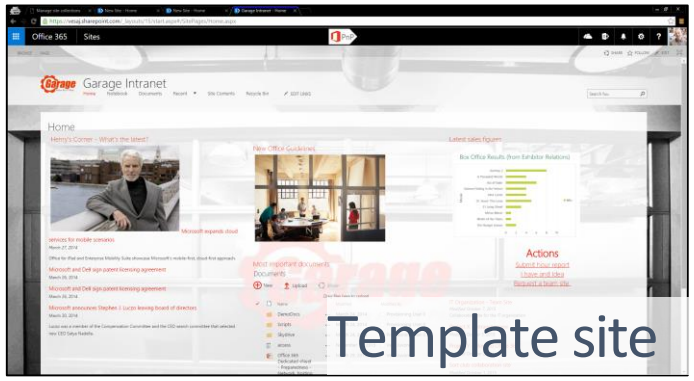
XML

You can use code to create and apply templates, but you can also serialize them, if needed

.pnp

OpenXML based template with configuration and assets, like images or theme definitions

PnP Provisioning Engine – Export/Import



Template site

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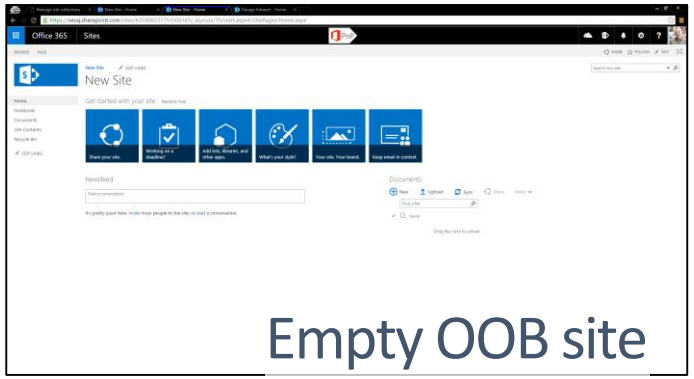
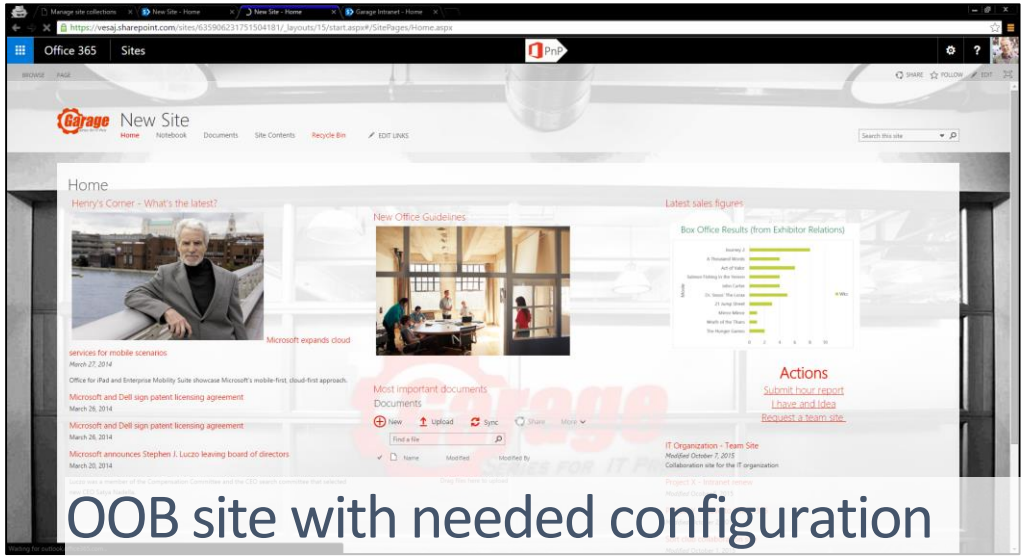


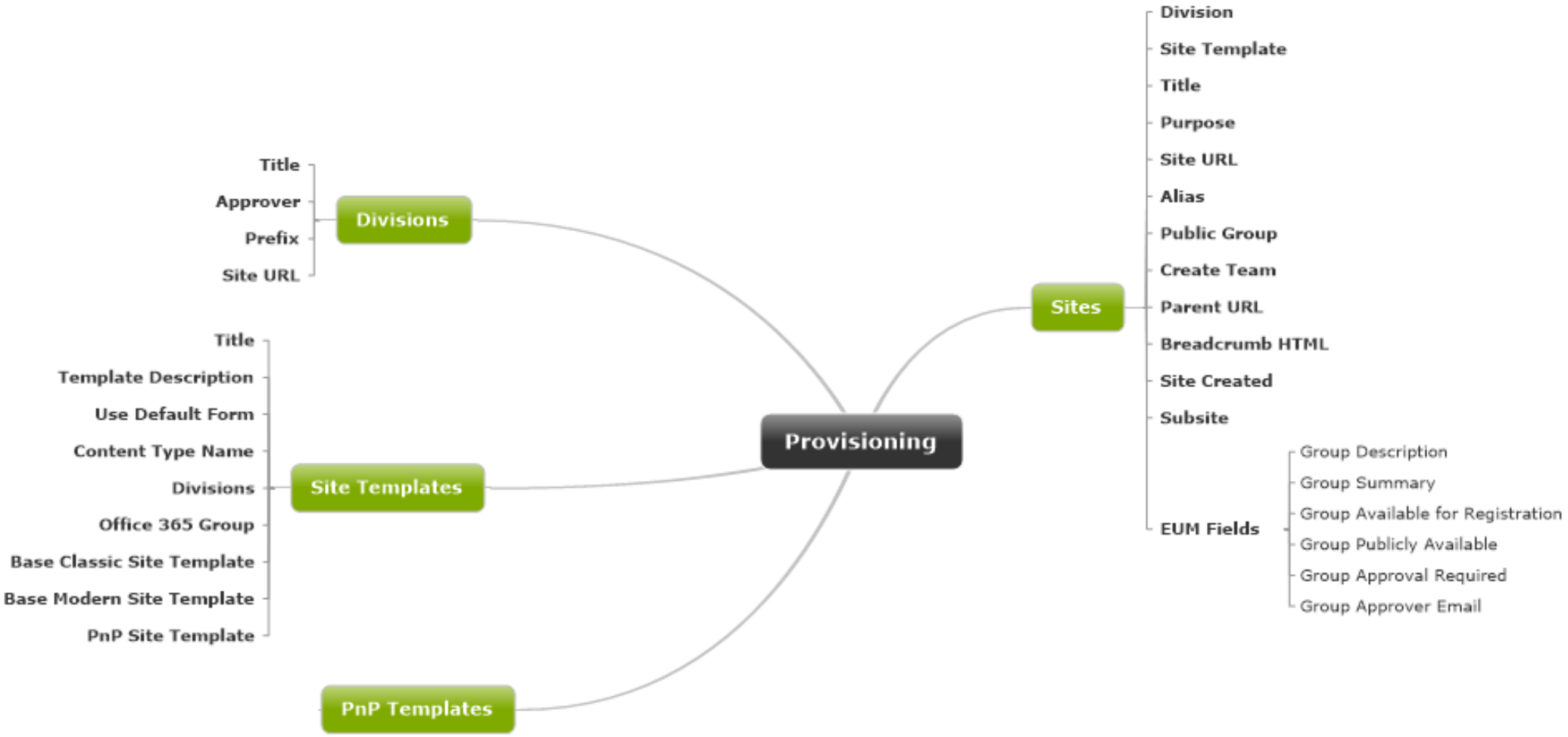
Empty OOB site

=



OOB site with needed configuration

Information Architecture



Project Documentation

- **Source code is available on GitHub at** https://github.com/petercarson/eum-sites/tree/V2
- **Full consolidated whitepaper with step by step instructions** https://www.extranetusermanager.com/resources/articles/site-provisioning-whitepaper-v2

Solution Demo

Office 365 Groups and Teams Governance

Envision IT Teams Governance

- **Create a Microsoft Team, Office 365 Group, and Modern Team Site for each client**
  - Includes a OneNote notebook, Stream Group, and Planner Plan
- **As new projects are started**
  - Create a channel in the Team
  - This creates a folder in SharePoint
  - Create a new Section in OneNote
  - Create a new Channel in Stream
  - Create a new Plan in Planner
  - Setup the Tabs in Teams to connect everything

Office 365 Group Elements

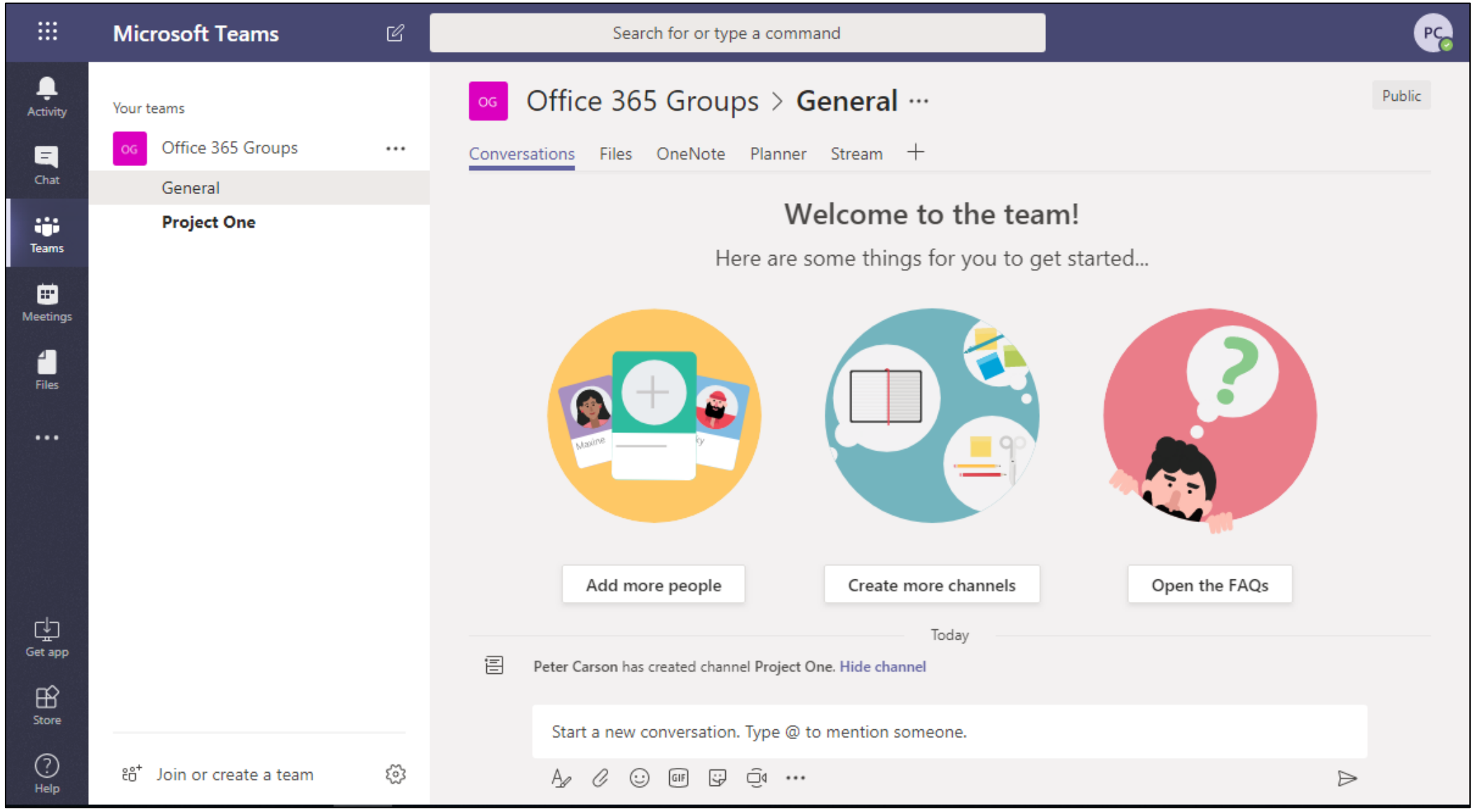
Teams – Channels

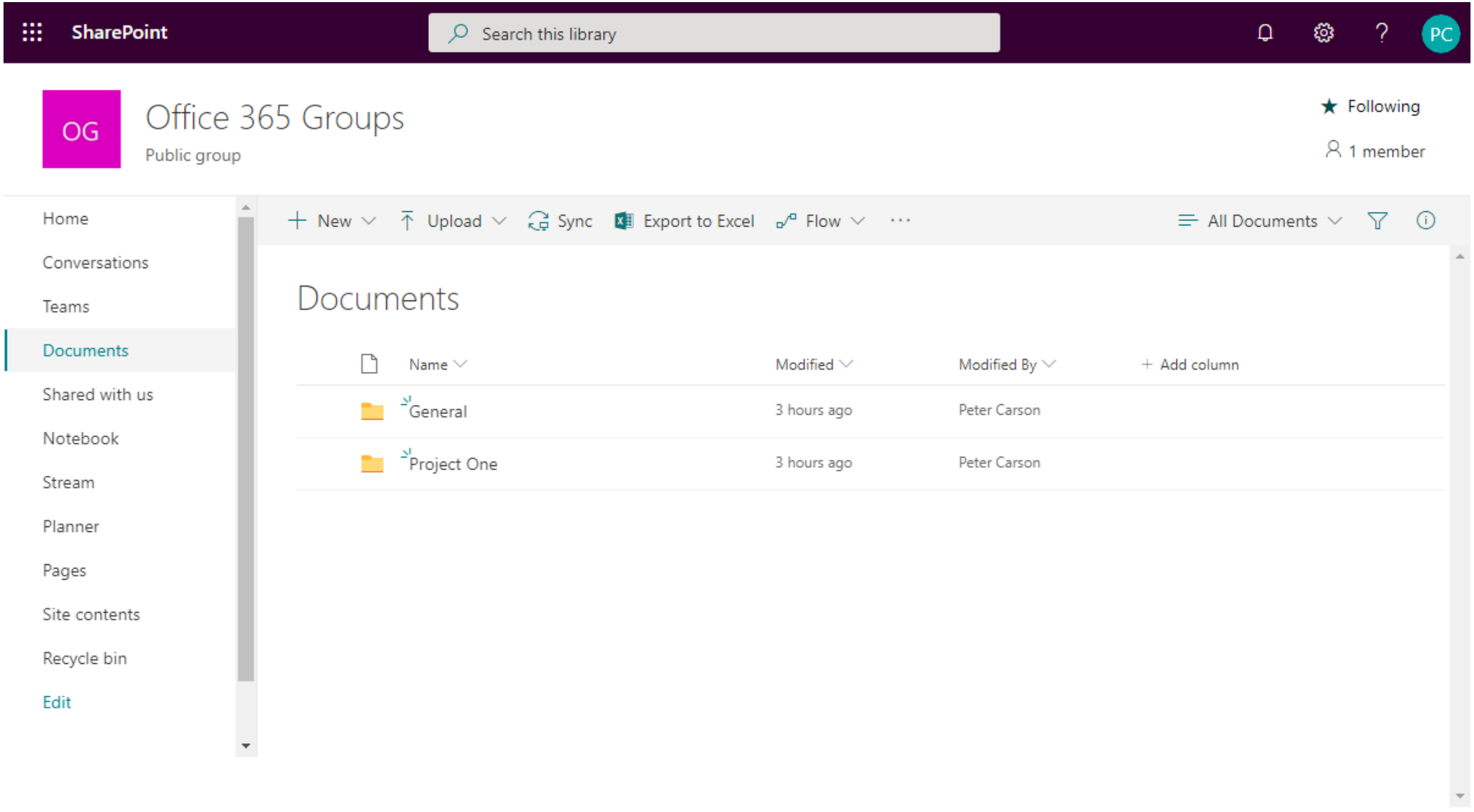
SharePoint - Document Library Folder

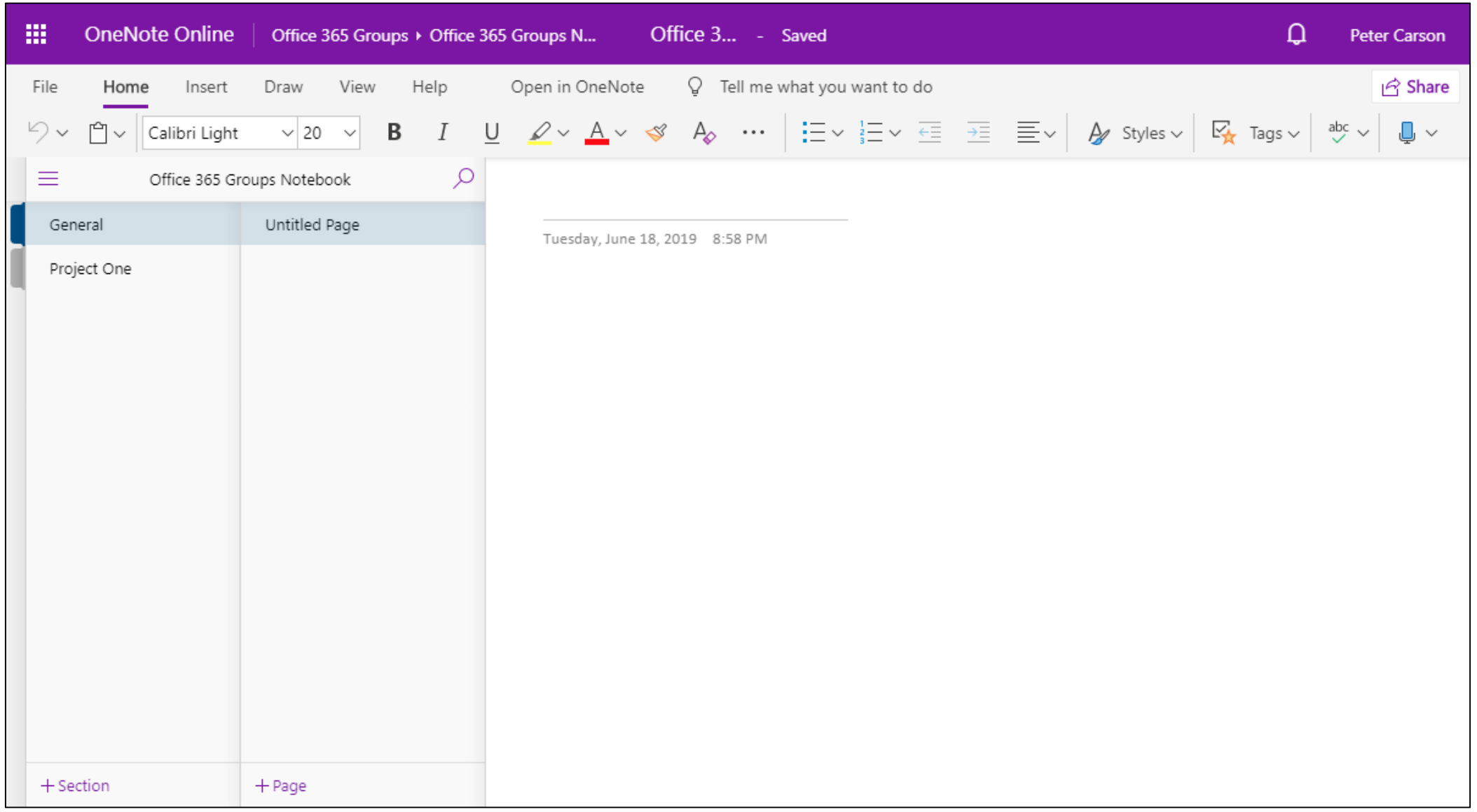
OneNote - Notebook Section

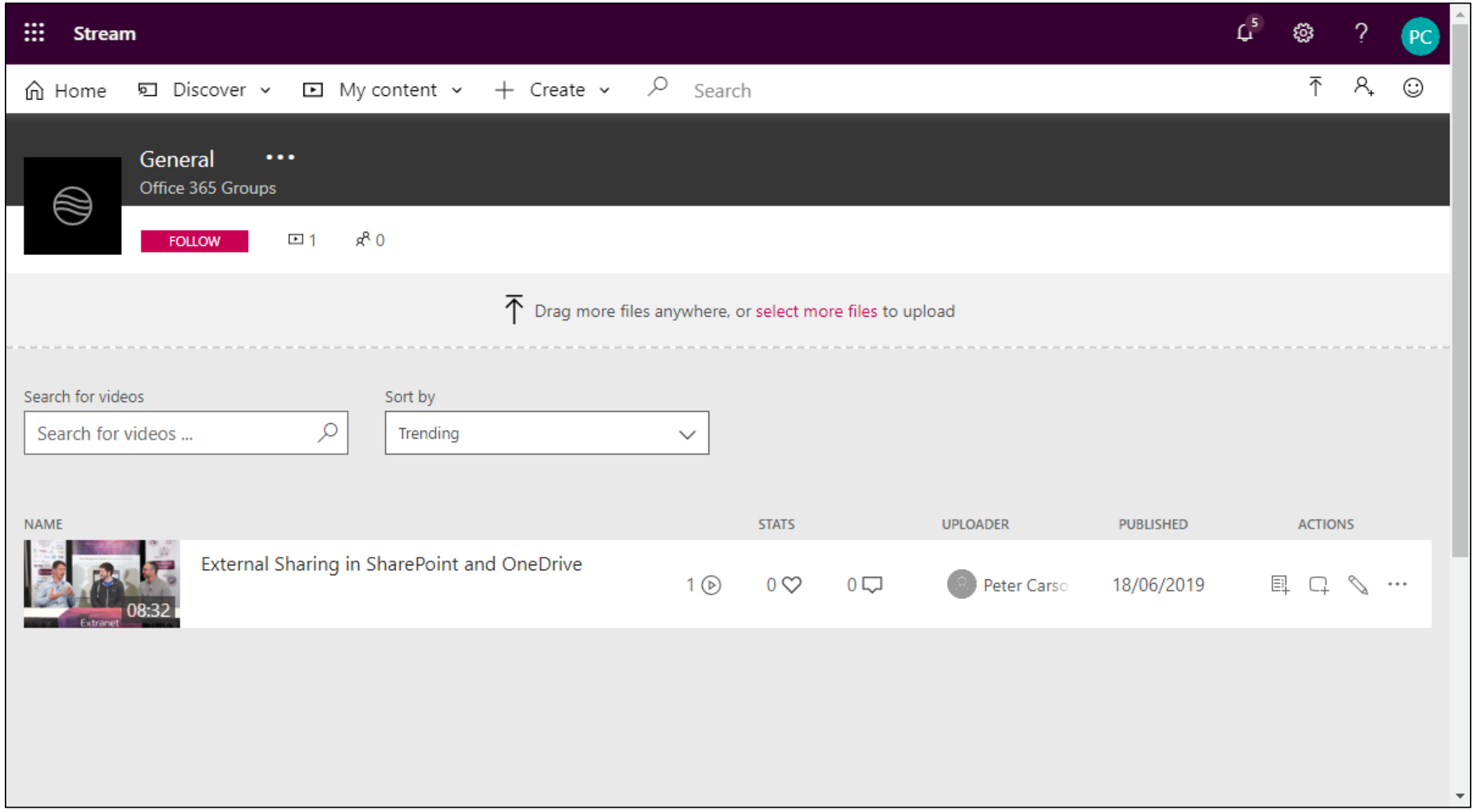
Stream - Group Channel

Planner - Multiplan


Microsoft Teams
Search for or type a command
PC
Activity
Chat
Teams
Meetings
Files
Get app
Store
Help
Your teams
OG
Office 365 Groups
General
Project One
Join or create a team
OG
Office 365 Groups > General
Public
Conversations
Files
OneNote
Planner
Stream
Welcome to the team!
Here are some things for you to get started...
Add more people
Create more channels
Open the FAQs
Today
Peter Carson has created channel Project One. Hide channel
Start a new conversation. Type @ to mention someone.


SharePoint
Search this library
PC
OG
Office 365 Groups
Public group
Following
1 member
Home
Conversations
Teams
Documents
Shared with us
Notebook
Stream
Planner
Pages
Site contents
Recycle bin
Edit
New
Upload
Sync
Export to Excel
Flow
All Documents
Documents
Name
Modified
Modified By
Add column
General
3 hours ago
Peter Carson
Project One
3 hours ago
Peter Carson


OneNote Online
Office 365 Groups ▸ Office 365 Groups N...
Office 3...
- Saved
Peter Carson
File
Home
Insert
Draw
View
Help
Open in OneNote
Tell me what you want to do
Share
Calibri Light
20
Styles
Tags
Office 365 Groups Notebook
General
Project One
Untitled Page
Tuesday, June 18, 2019 8:58 PM
+ Section
+ Page


Stream
PC
Home
Discover
My content
Create
Search
General
Office 365 Groups
FOLLOW
1
0
Drag more files anywhere, or select more files to upload
Search for videos
Search for videos ...
Sort by
Trending
NAME
STATS
UPLOADER
PUBLISHED
ACTIONS
External Sharing in SharePoint and OneDrive
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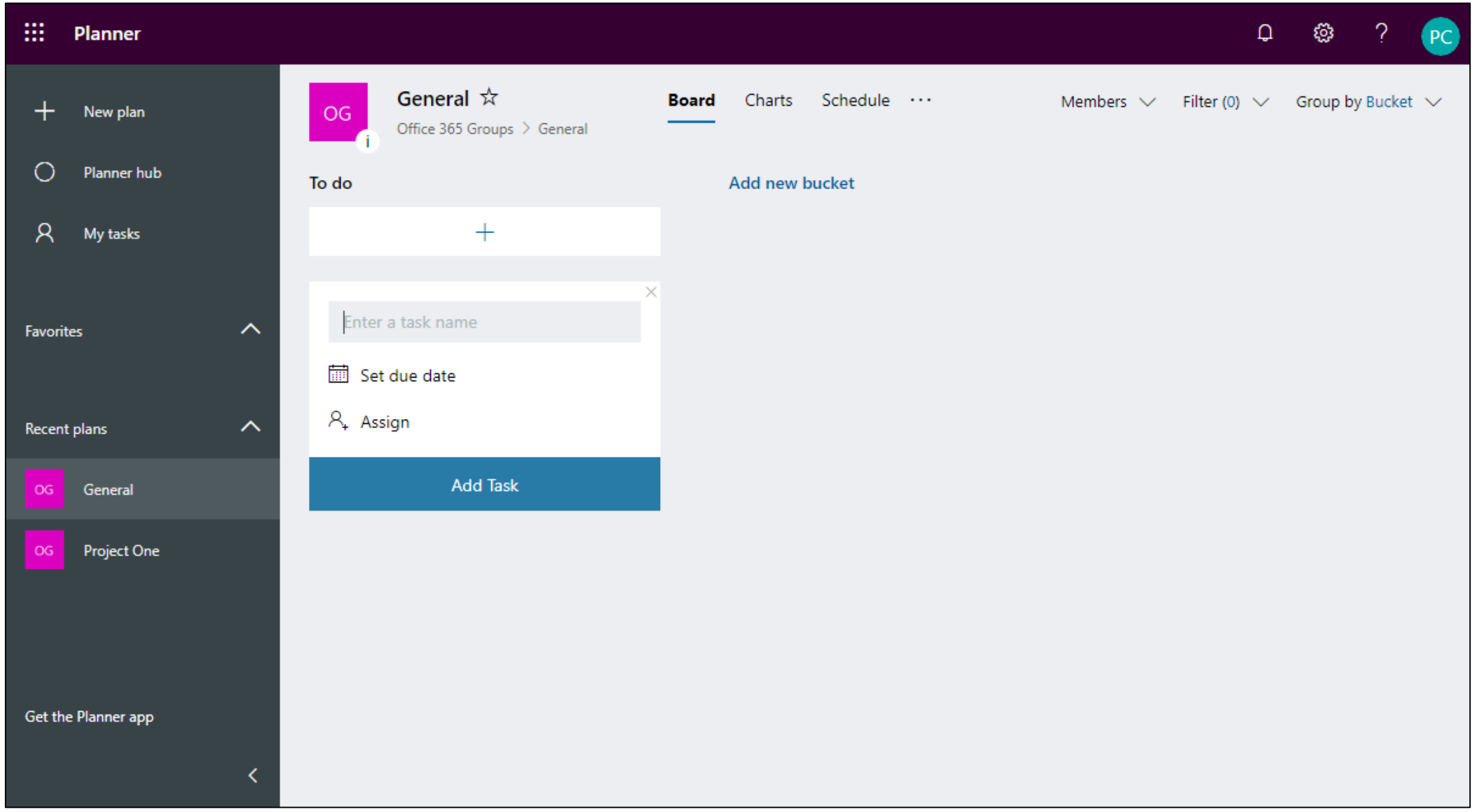
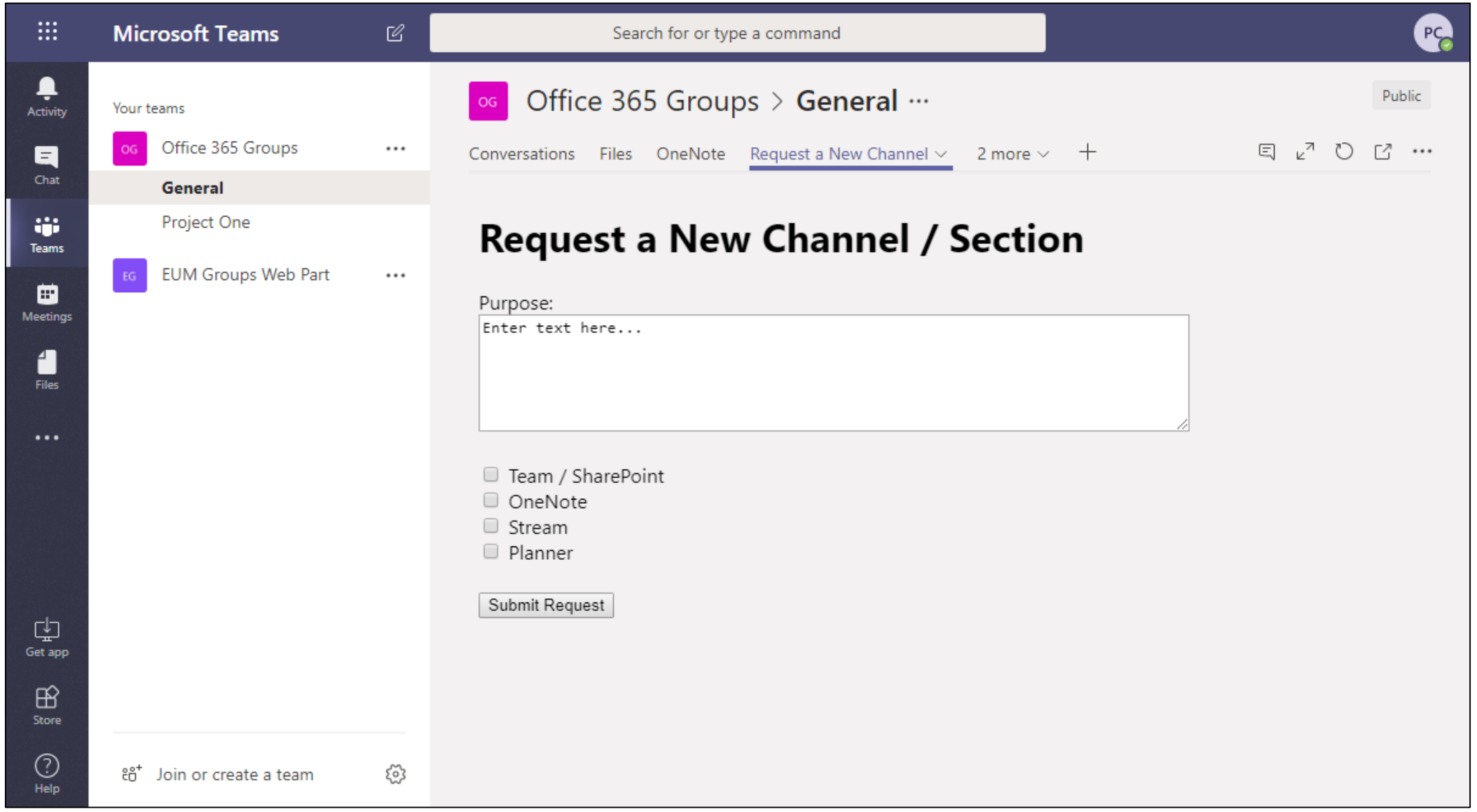
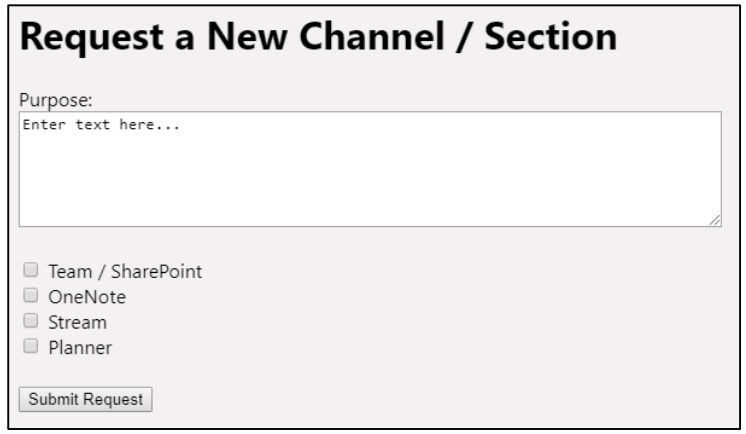
Peter Carso
18/06/2019


Planner
PC
New plan
Planner hub
My tasks
Favorites
Recent plans
OG
General
OG
Project One
Get the Planner app
OG
General
Office 365 Groups > General
Board
Charts
Schedule
Members
Filter (0)
Group by Bucket
To do
Add new bucket
Enter a task name
Set due date
Assign
Add Task


Microsoft Teams
Search for or type a command
PC
Activity
Chat
Teams
Meetings
Files
Get app
Store
Help
Your teams
Office 365 Groups
General
Project One
EUM Groups Web Part
Join or create a team
Office 365 Groups > General
Public
Conversations
Files
OneNote
Request a New Channel
2 more
Request a New Channel / Section
Purpose:
Enter text here...
Team / SharePoint
OneNote
Stream
Planner
Submit Request

Office 365 Group Elements



SharePoint

Flow

Teams - Create New Channel - **Tabs**

SharePoint - Document Library Folder

OneNote - Add Notebook Section

Stream - Create Group Channel

Planner - Add Multiplan

Wrap-Up Points

- **Office 365 Groups are a great way to manage projects**
  - SharePoint, conversations, calendar, OneNote, Skype, Planner, Delve
- **You don't need to start with everything, choose what makes sense for your organization**
- **Be prepared for change, Office 365 is changing quickly**
- **Decide which conversation formats make sense for your teams**
  - Outlook, Yammer, Teams (persistent chat)
- **Put your governance in place**
- **What is your external user policy?**
- **Figure out your Information Architecture and site templates**
- **Build a provisioning process**

Upcoming Events

Extranet User Manager Webinar
Teams, Groups and Site Provisioning with External Sharing
January 21, 2020
12 pm – 1 pm EST

Eum.co/events

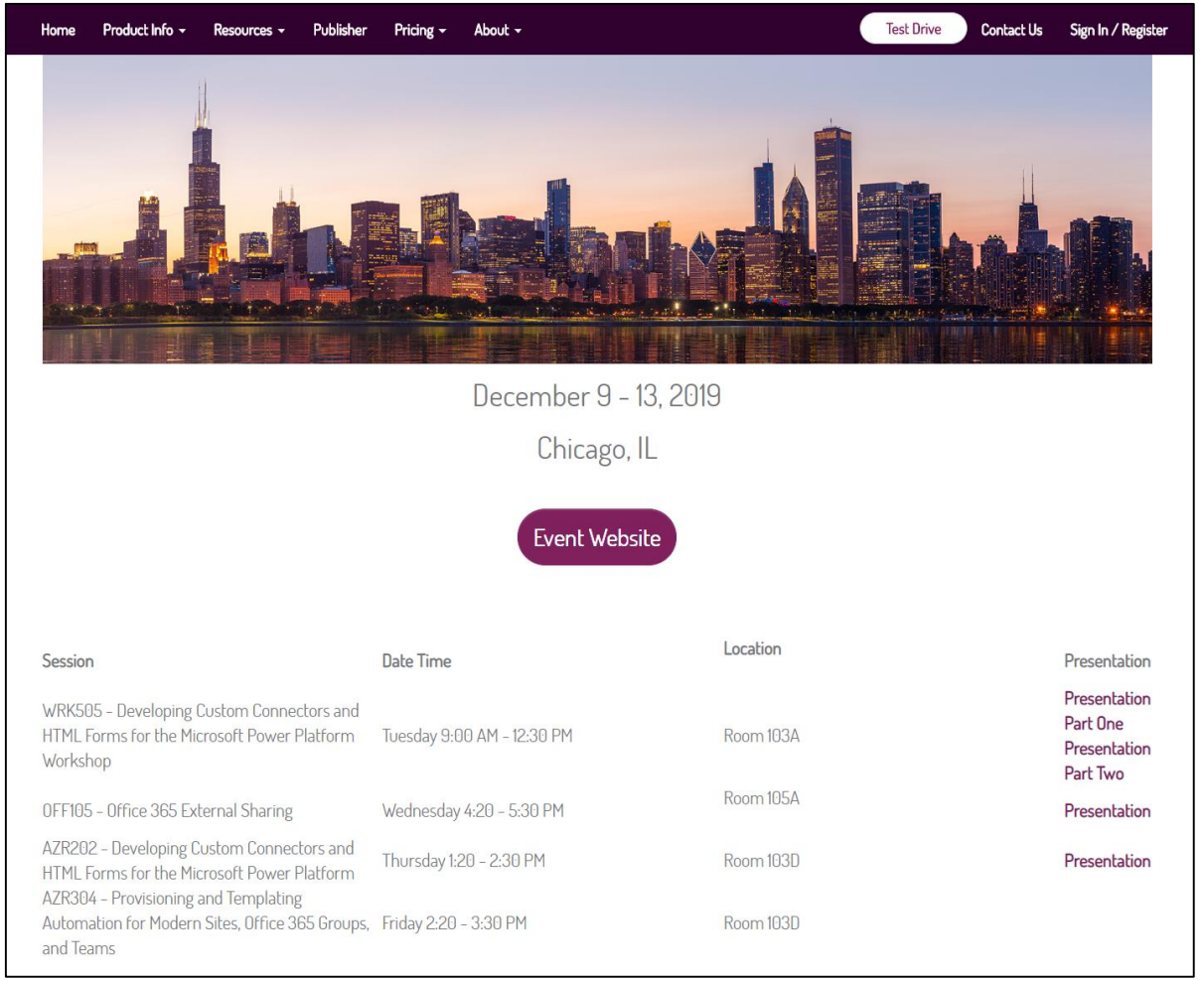
May 19-21, 2020
Las Vegas

https://sharepointna.com/

June 8-10, 2020

https://www.collabsummit.eu/

http://eum.co/resources/events



Thank you!

Questions?