

Teams First Information Architecture and Governance Workshop

Peter Carson



Peter Carson



- ✓ • President, Extranet User Manager
- ✓ • Office Apps and Services MVP for 13 consecutive years
- ✓ • President, Toronto SharePoint Users Group

Agenda

- What is Teams First Information Architecture
- Comparing Teams Channel types and their site collections
- Teams and SharePoint product architecture
- Where are you today?
- Planning and Tools
- Breakout Group Planning Exercises
- Group Presentations

Microsoft 365 Information Architecture



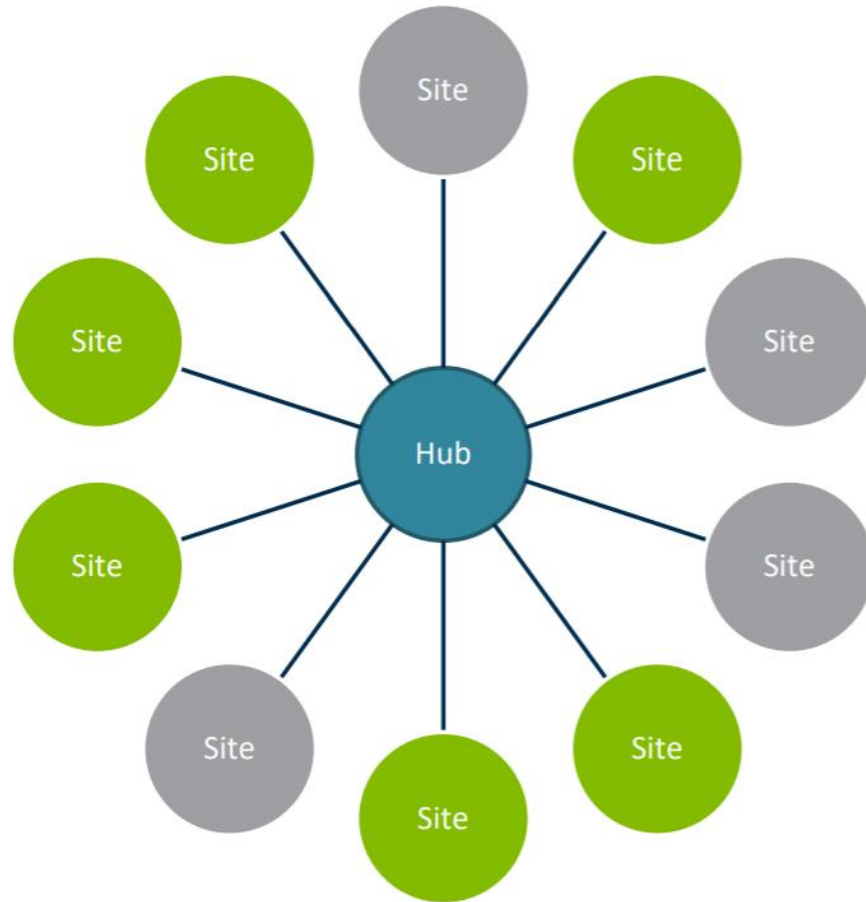
- Organizing content in a way that's easy to find and use
- Aligns with business needs and objectives
- Provides a consistent user experience
- Facilitates collaboration and communication

SharePoint Online

- Single version of truth
- Document and Records Repository for the Organization
 - Eliminate shadow IT (Dropbox, Box, etc.)
 - Decommission on-premises File Share servers
- Communicate and Collaborate
- Corporate Intranet
- Team Sites
- Forms and Workflows



SharePoint Hub Site Model



- Connect related sites
- Common navigation through the hub
- Content Rollups (news and events)
- Consistent look & feel
- Quick & easy searching
- Associate Hubs up to three levels

Folders, Document Sets, Metadata

- Teams encourages folders
- Teams also now supports rich metadata and views
- Document sets can be used to simplify assigning metadata
- Additional metadata can be set at the document level
- Folders can still be used

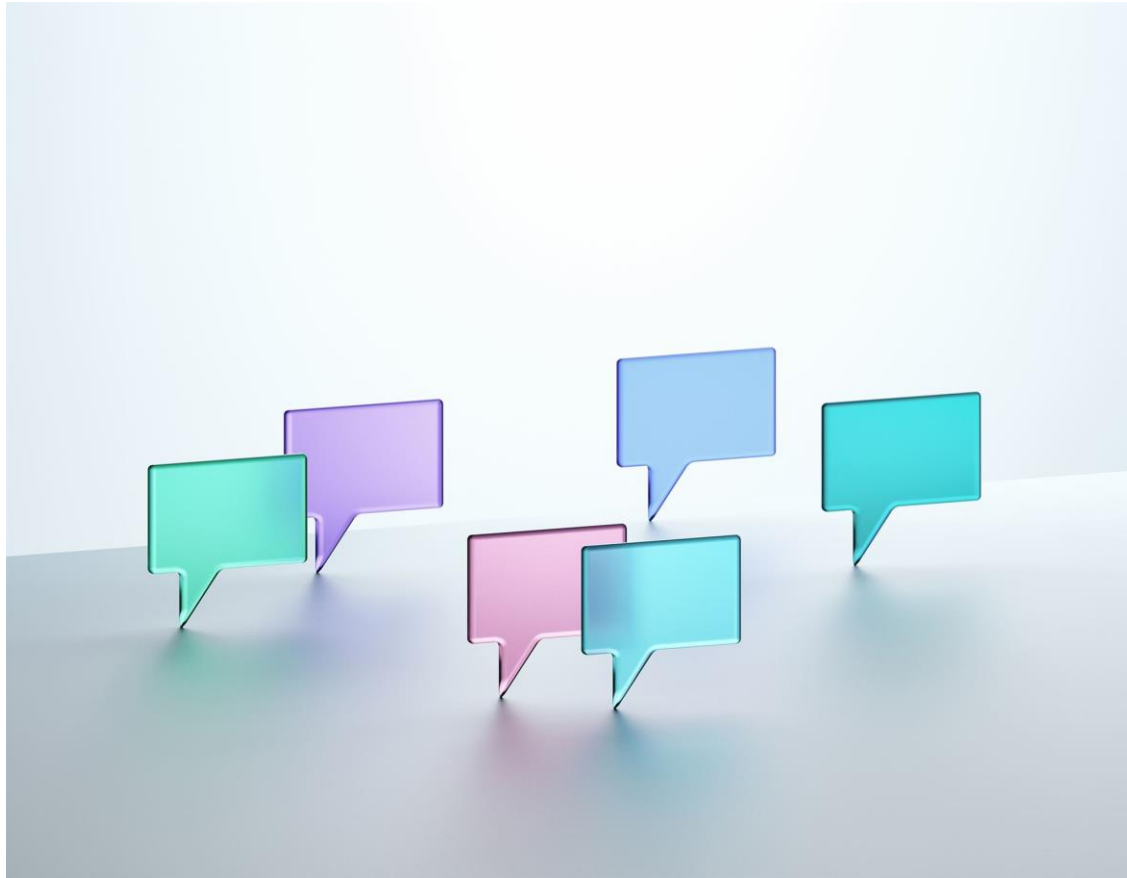


The Overwhelming Inbox



- Inboxes can quickly become unmanageable
- Hundreds of thousands of emails can pile up
- Important information can be lost in the shuffle

Teams Group Chat Can Be Confusing



John: Hey, did anyone see the new budget report?

Samantha: Yes, I did. It looks like we're on track for this quarter.

Mike: Hey, has anyone seen my coffee mug?

John: That's great to hear, Samantha. Do we need to make any adjustments?

Samantha: I don't think so, everything seems to be in order.

Mike: Nevermind, found it.

Jane: Hey guys, quick question. Are we still on for the meeting at 2pm?

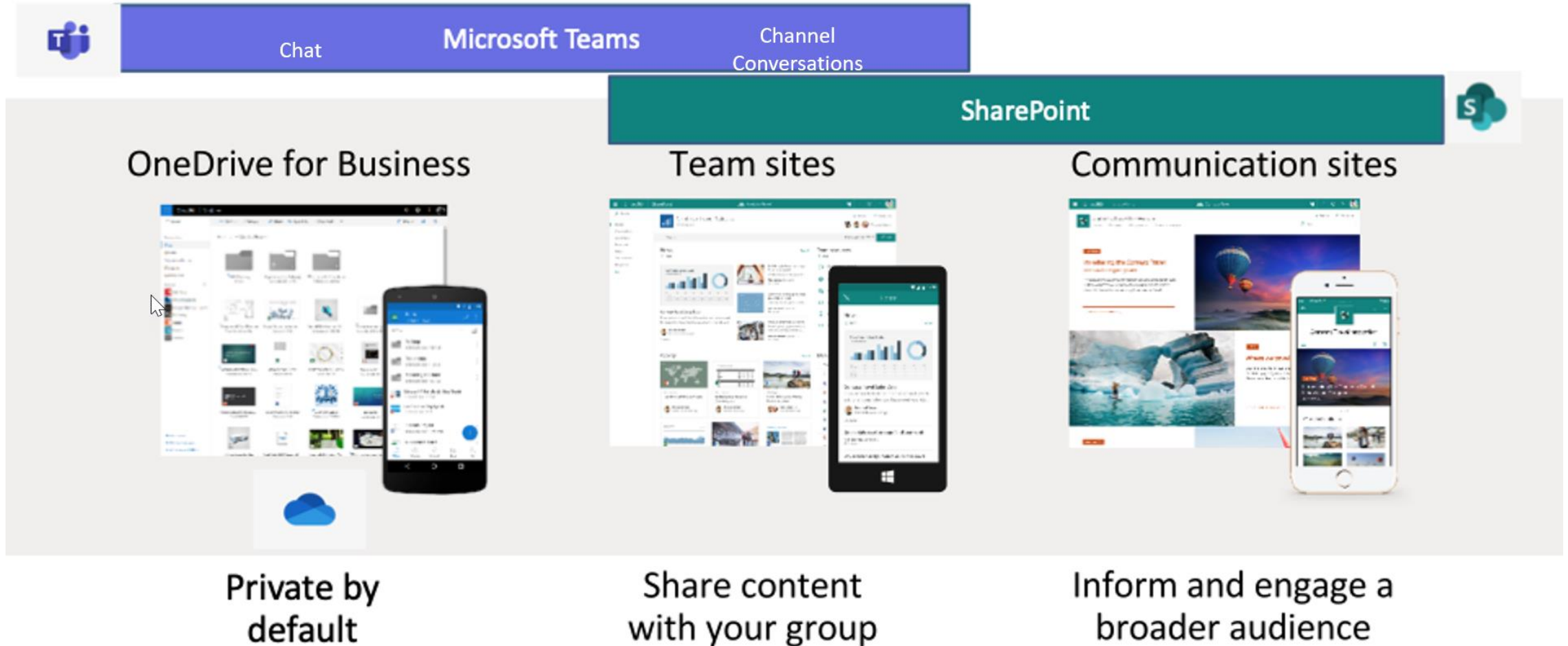
John: Yes, we are. See you there.

Samantha: Mike, can you please keep the chat on topic?

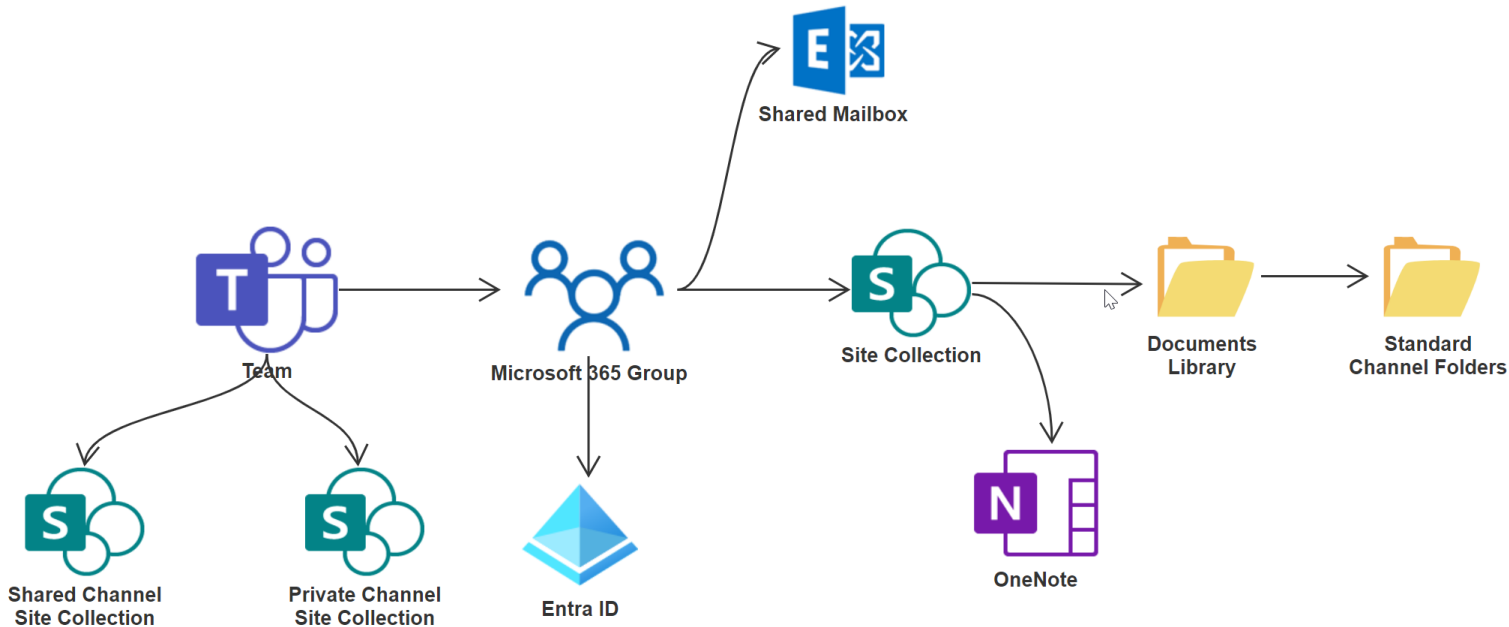
Mike: Sorry about that.

Jane: Great, thanks John.

Three Places to Work





Teams Architecture



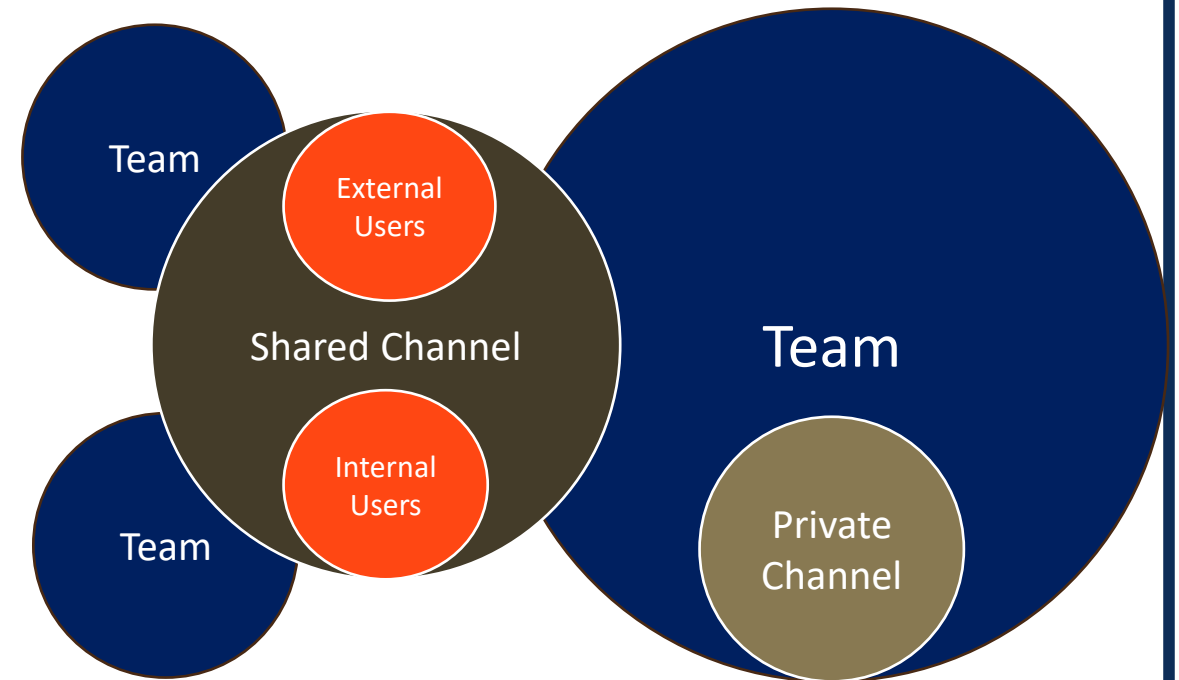
- **Microsoft 365 Group**: central hub for user identity and permissions
- **Shared Mailbox**: receives communications related to the Team/Site Collections
- **Document Library**: central repository for files that feed into Standard Channel folders
- **OneNote**: used for shared note-taking, accessible within Teams

Types of Teams Channels

	Standard Channel	Private Channel	Shared Channel
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

Private vs. Shared 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



B2B Guests vs. Direct Connect 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 external tenant
 - Lose their home tenant's Teams, notifications, feeds
- Can use different browser profiles for different tenants
- SharePoint content is easily accessible

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
- SharePoint content can only be accessed by Shared Channel members, not B2B guests

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



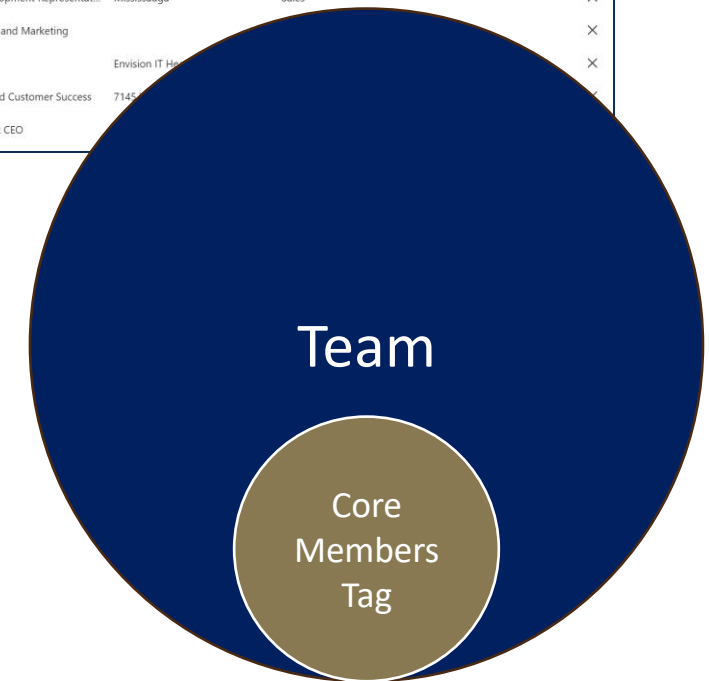
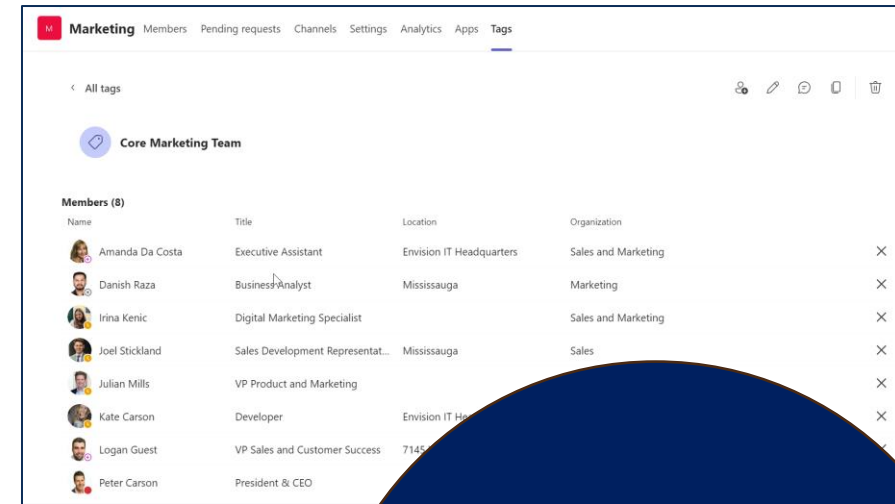
Do you like the convenience for the external users not having to tenant switch in Teams?



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

Using Tags in Teams

- Not everyone that has visibility to a Team wants to be notified of all activity
- People often turn channel notifications off
- Tags allow you to quickly target the important people in a Team
- Particularly important in a “Working out loud” organization where Teams are shared broadly



Teams First Information Architecture

Question: What does a Team and Channel represent in my organization?

Team	Channel
Department	Sub-departments, projects, products, folders
Client	Project
Location	Project
Projects	Phases
Initiatives	

Steps for Implementing Teams First Information Architecture

Teams First IA Overview

- Microsoft Teams doesn't need to be first on the roadmap
 - These days it is usually already there
- Teams defines the top of the SharePoint Online information architecture
 - Teams → Teams Sites
 - Channels → Folders in Documents library or separate Team Sites

Steps:

- Building the IA to support Teams and planning the migration
- Migrate from file shares, SharePoint Online, etc. into this IA
- Clean up an existing Teams mess
- Create a communication and change management plan

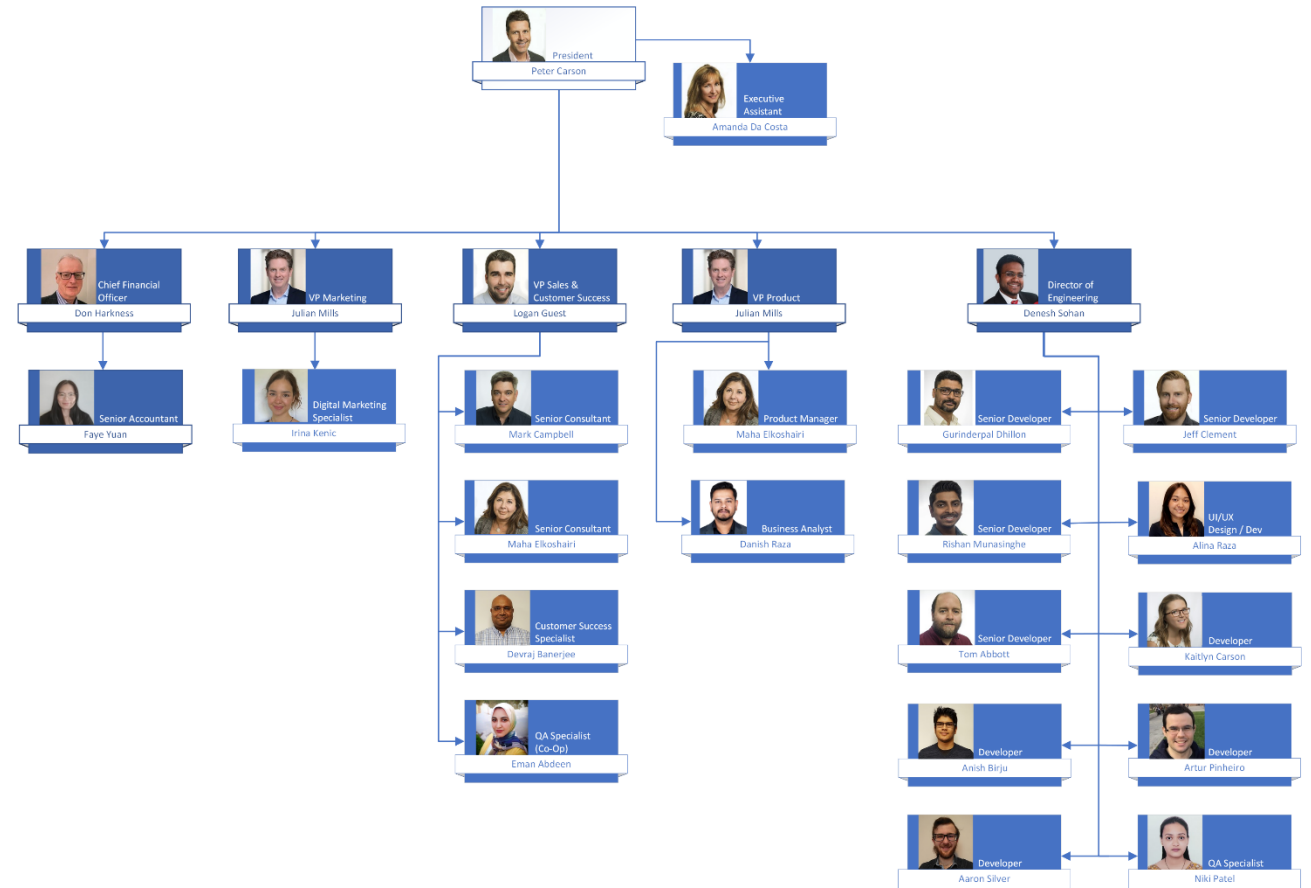
Phase I: Information Gathering

Information Gathering

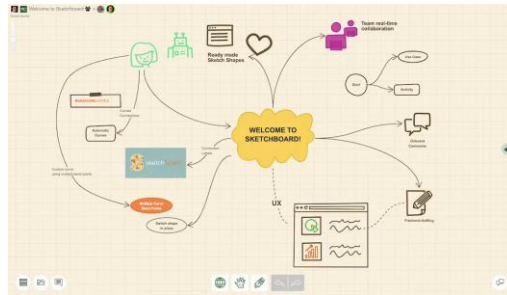
- The first step is to understand the way your organization works
- Identify operational and department processes that require documentation
 - Current organizational chart **
 - M365 Usage Reports (Teams, Email, Document Management)**
 - Inventory (Teams, SharePoint Sites and Files, File Shares, SaaS, Other) **
 - Onboarding/Offboarding processes
 - Forms and Workflows

Organizational Chart

- **Why start with your Org Chart?**
 - Maps role-based access controls
 - Pinpoints collaboration hotspots
 - Identifies key communication channels



Tools for Planning Your IA

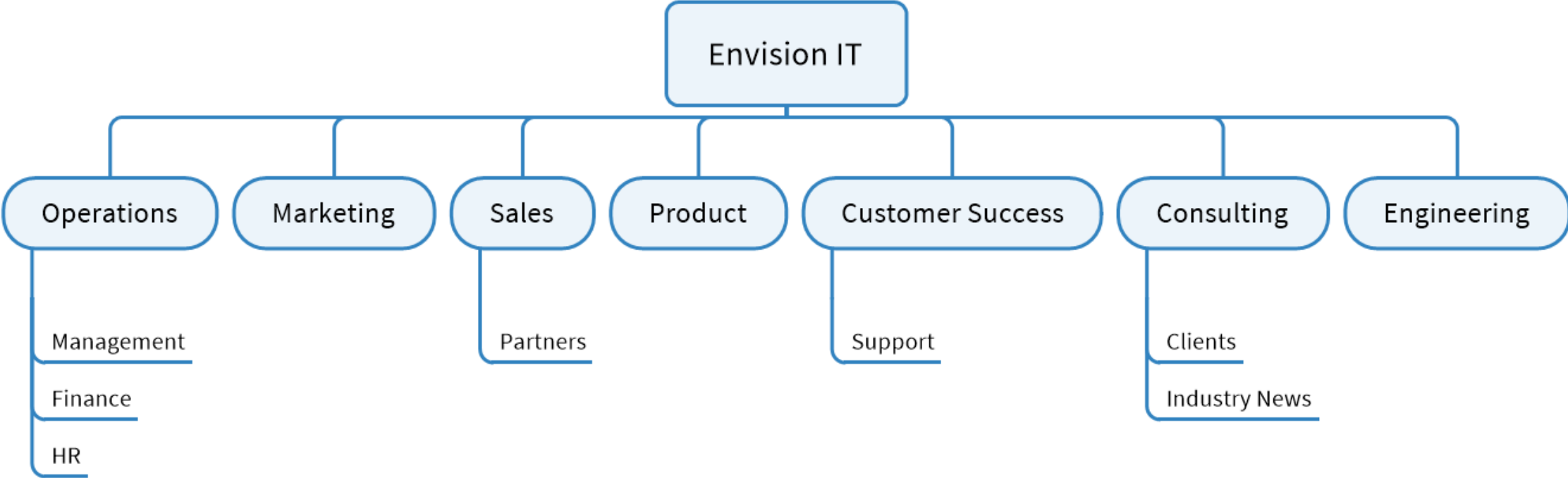


[Sketchboard](#)

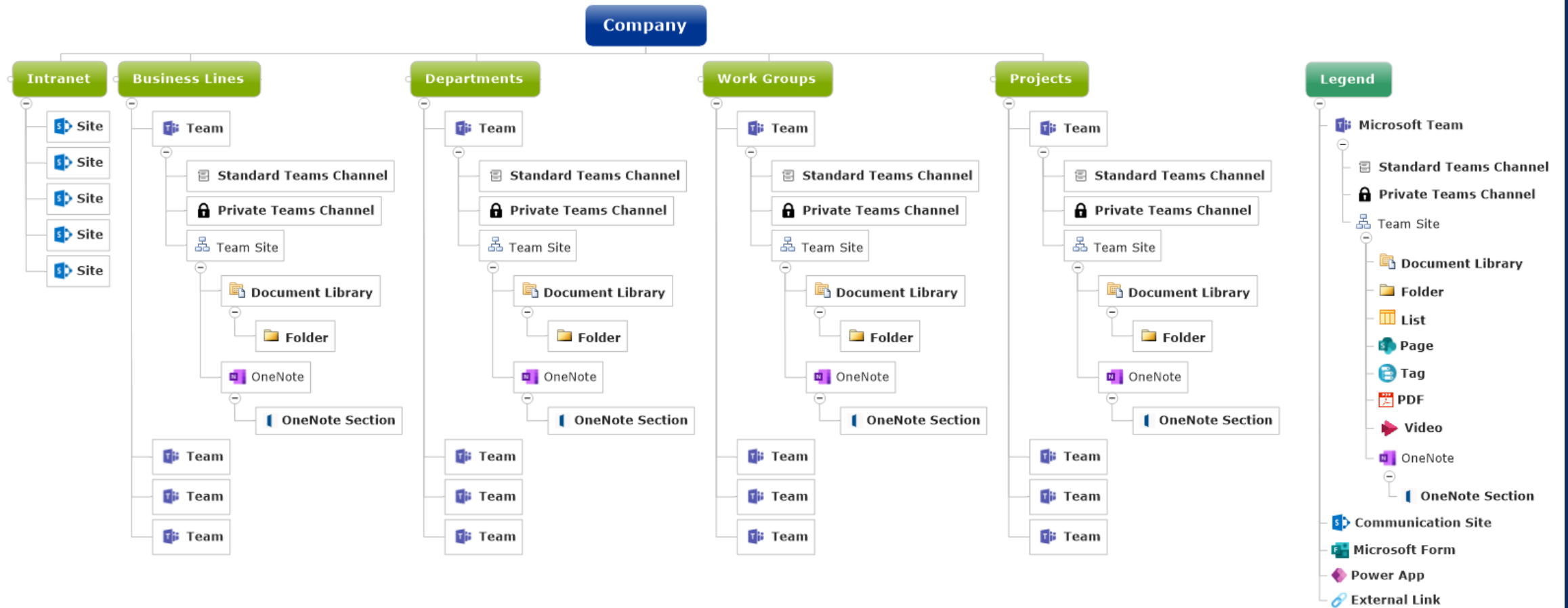


[MindManager](#)

Envision IT IA

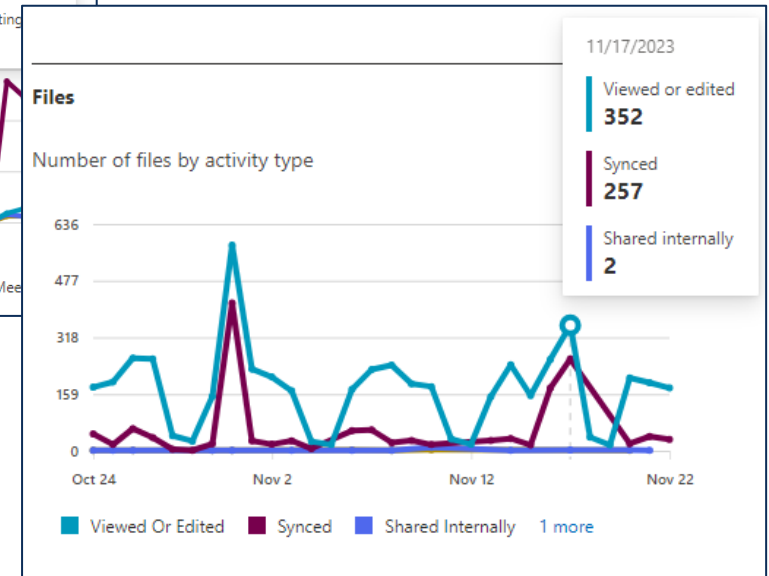
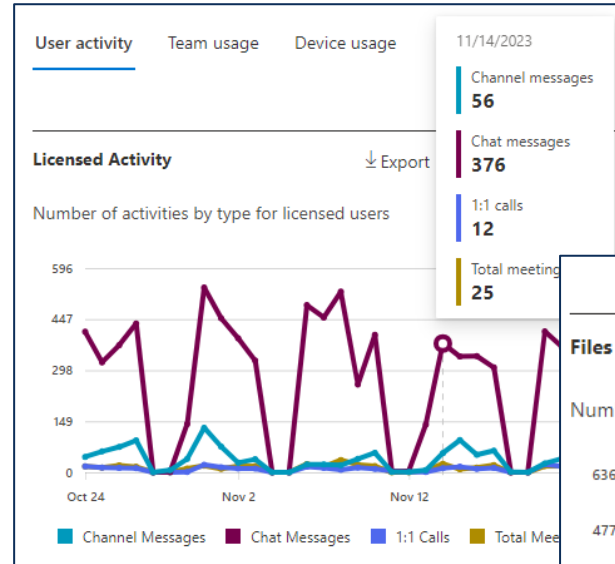


Information Architecture Sample

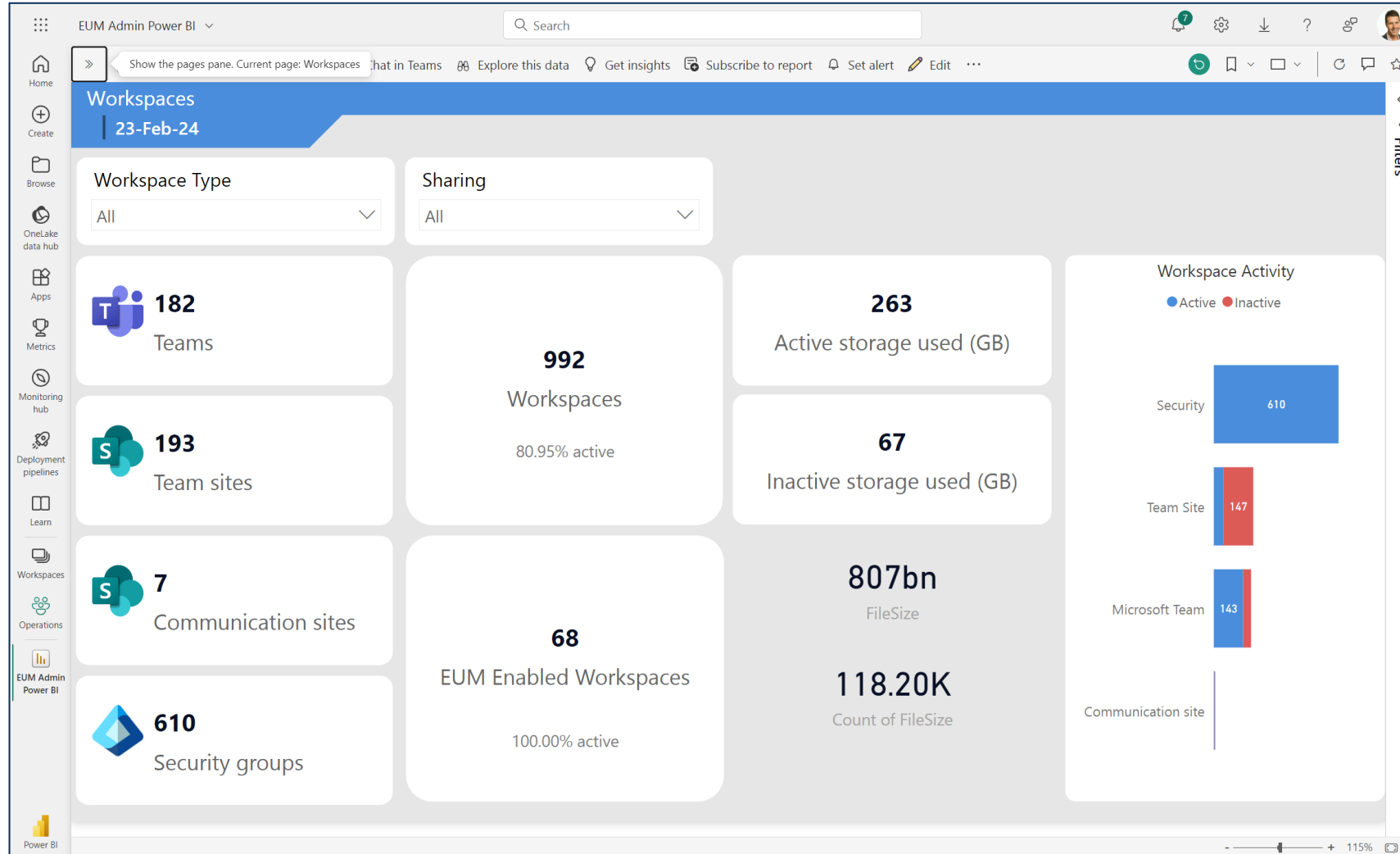


Microsoft 365 Usage Reports

- Access rich usage reports for licensed users or by activity type
- Available for SharePoint, Teams, and Outlook

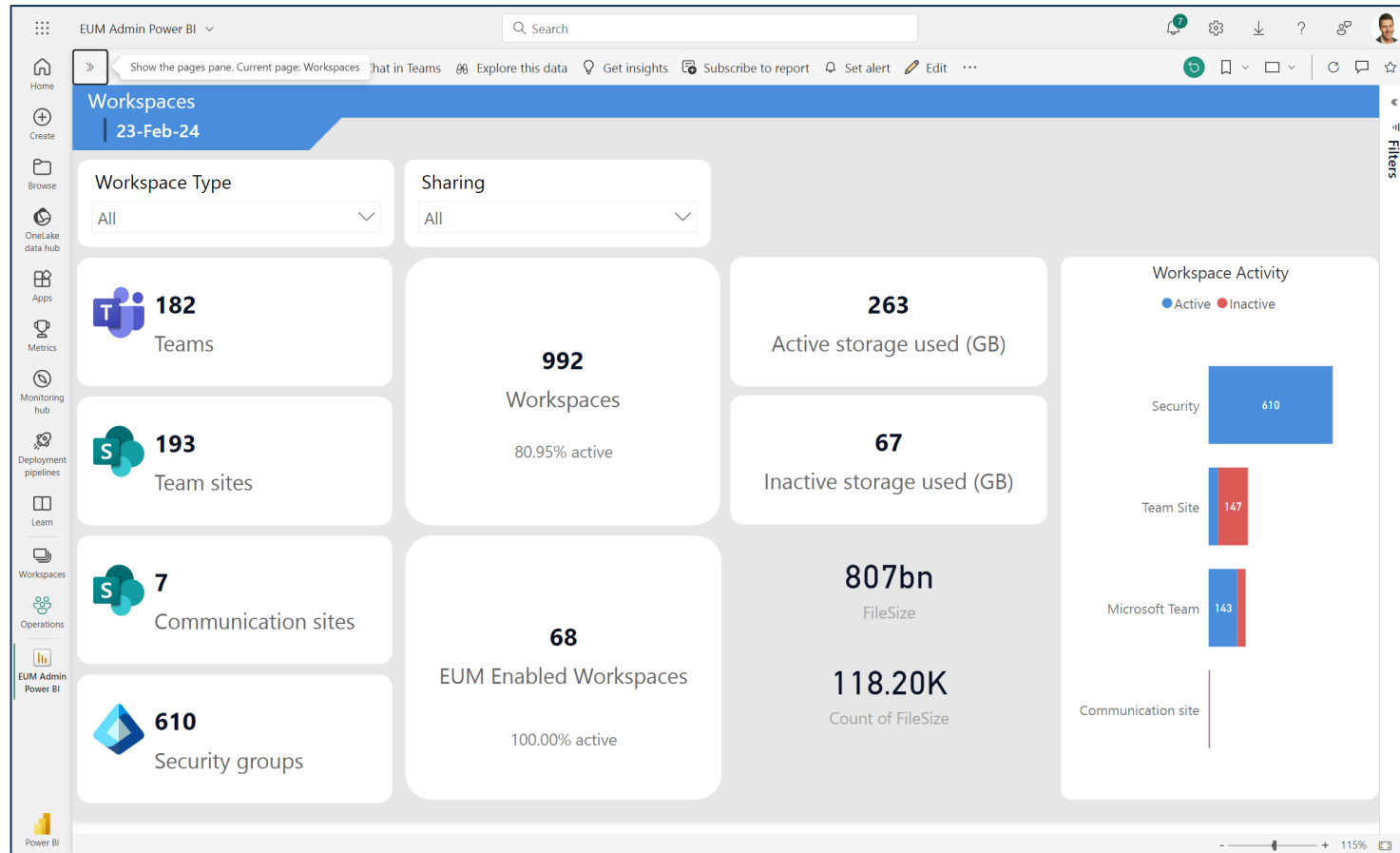


Microsoft 365 Workspaces Analysis



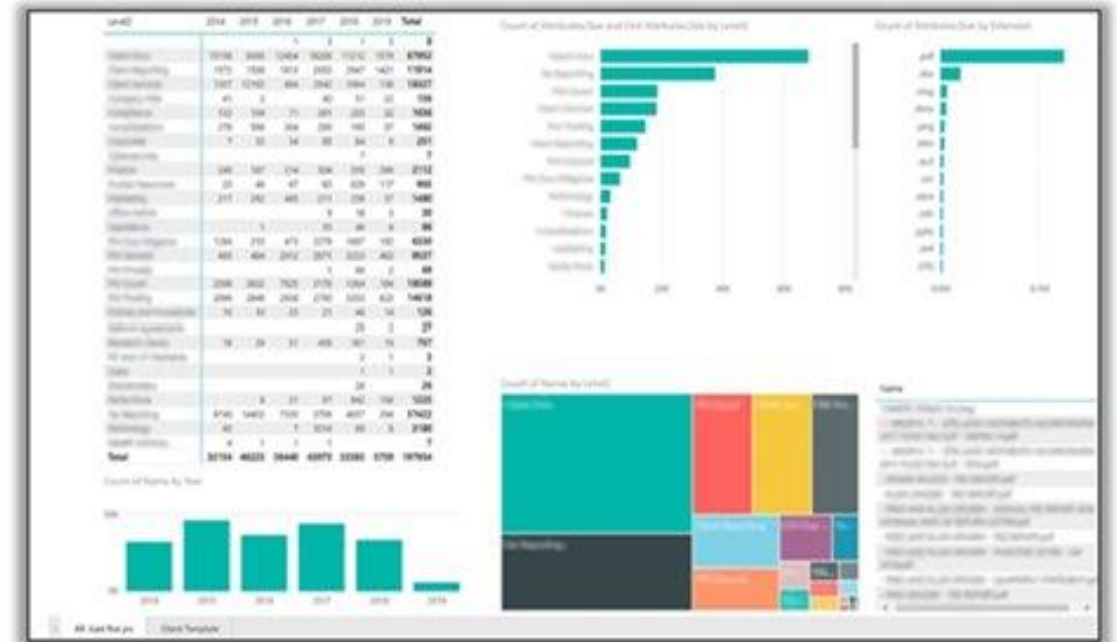
Open-Source Workspace Analysis

- Data Harvester runs against your Microsoft 365
 - Teams, Microsoft 365 Groups, SharePoint Sites, Security Groups
 - Member and Guest accounts
- Output is fed into Power BI Report
 - Workspaces and types
 - Activity level
 - Last Teams conversations and SharePoint activity
 - Identity active and inactive workspaces and channels



Open-Source Inventory Analysis

- Inventory scripts to determine how many files you have in:
 - SharePoint, Teams, File Share
- Output is fed into a Power BI Report to showcase the following:
 - Number of lists and libraries
 - Number of pages
 - Number, sizes, and dates of documents
 - Number of list items



Orchestra Review

Phase II: Teams First Planning

Consolidate Findings

- Begin planning your Teams-First IA transition
- Identify what Teams and Channels represent in your organization

Example:

Team	Channel	Channel Type
Department	Sub-departments, projects, products, folders	
Client	Project	
Location	Project	
Projects	Phases	
Initiatives		
Committee		

Who Needs Access to Your Information?

Users have different permissions levels depending on their job function, licensing, and how they are set up in your tenant.



Review Group Memberships

- Entra ID Groups
- Dynamic Groups
- Import/sync from other systems (such as HRIS)



External Users

- Who are your external stakeholders? How are you provisioning access?

Company Communications



Microsoft Teams

- Ideal for smaller organizations
- Great for on-demand communications
- Anyone can post announcements



Viva Engage

- Ideal for larger organizations
- Create communities for different types of conversations
- More of a social platform than announcement/news



SharePoint Intranet

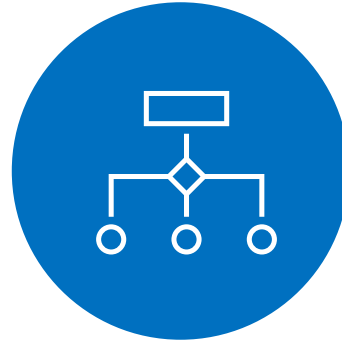
- Ideal for medium-large organizations
- Announcements handled by a designated comms/HR team

Advantages of Teams for Company Communications



Increased Engagement

- Teams' interactive platform encourages active participation
- Emails can be easily missed due to high email volume



Streamlined Information Flow

- Organize conversations by topics or projects
- Easier to track and manage discussions



Builds Organizational Knowledge

- History is available to new team members
- Searchable

Migration Planning

Teams and Sites Provisioning

- Automate the creation of Teams and Sites
- Based on Teams and Sites Templates
 - Project Teams
 - Department Teams
- Integrate OneNote, Planner and other components in templates
- Full lifecycle including retention and deletion



Envision IT Open-Source Solution

- Effective governance to avoid site sprawl
- Intuitive form for creation of new Team site
- Logic App generates O365 Group
 - SharePoint Site including OneNote
 - Exchange calendar and mailbox
 - Microsoft Team
 - Optional Project (Channel)
- A-Z SPFx web part
- May be integrated with CRM and ERP systems
- [Teams Provisioning | Envision IT](#)

Site Request

Division *
Leviathan Security Group

Site Template *
Client Site

Title *

Purpose

Alias *

Public Group
 Yes

Create Team
 Yes

Document Migration

- Inventory of existing repositories
- 'Teams First' Information Architecture
- Communicate with users to notify of upcoming change
- Templates for Teams/Teams Sites
- Deciding how Teams/Sites will be created moving forward
 - Manual vs. Automated

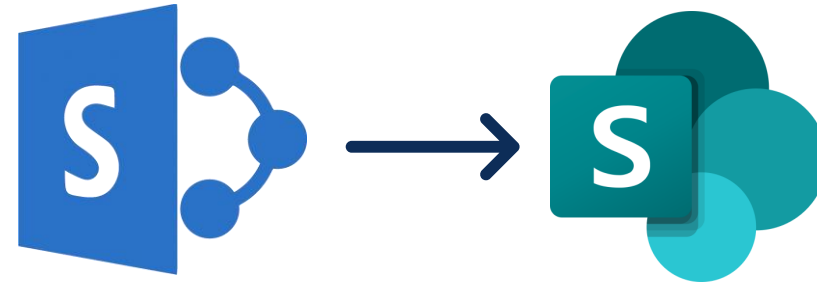
Teams First SharePoint Migration



Migration Tools

ShareGate:
Desktop

[ShareGate Desktop](#)



**SharePoint Online
Migration Tool**

Other Topics



Purview Retention and Information Protection



Data Lifecycle Management & Records Management

- Data Identification
 - SharePoint, OneDrive, Teams, Exchange
- Data Classification
 - Apply Retention Labels
- Data Protection
 - Retention Policies



Information Protection

- Identify Content
 - Identify Sensitive information Types
- Classify Content
 - Apply Sensitivity Labels
- Protect Content
 - Apply Data Protection Policies
 - Conditional Access Policies
 - Encryption
 - Content Markup (ie: watermark)
 - Rights Management

Supporting Resources

- [Teams Provisioning | Envision IT](#)
- Inventory Scripts and Power BI Dashboard
- Microsoft 365 Workspace Power BI Dashboard
- [Azure AD B2B Collaboration Resources | Extranet User Manager](#)
- [How We Use Teams Shared Channels | Extranet User Manager](#)

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