ESPC
Amsterdam23

Teams First Information Architecture & Governance

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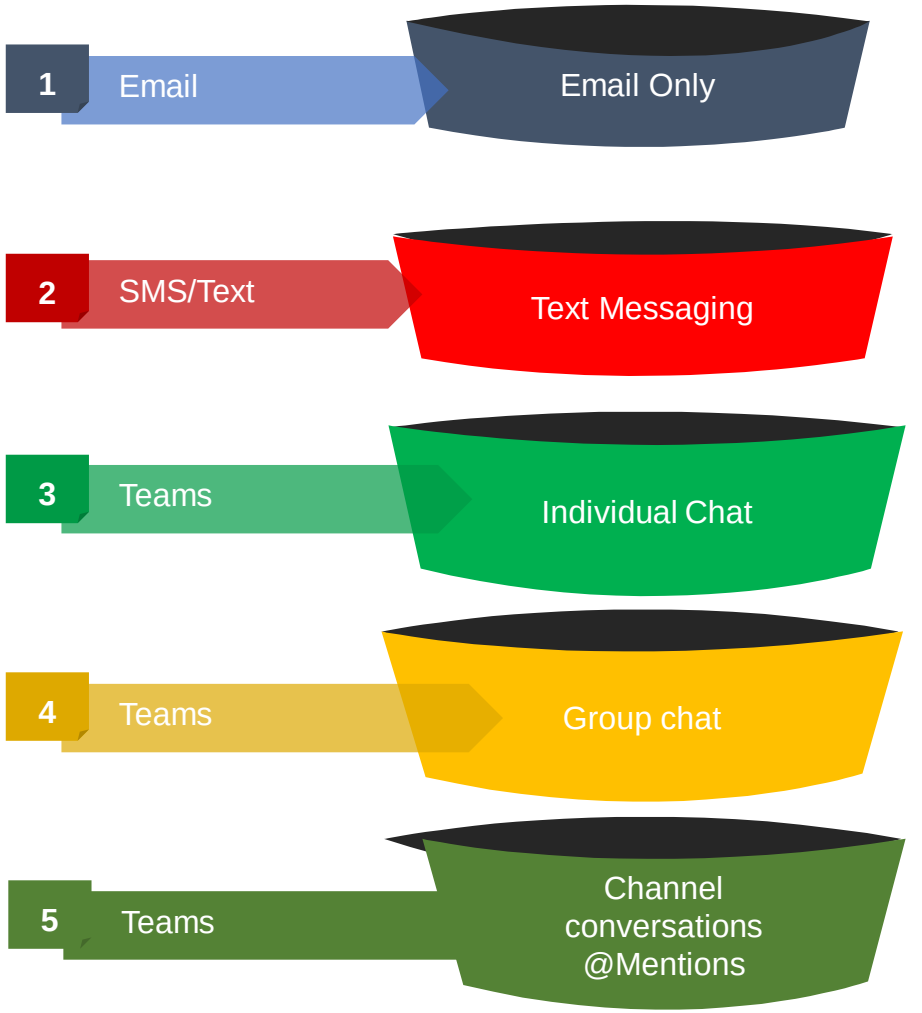
Agenda

- Maturity Model for leveraging Teams, SharePoint, Email and OneDrive
- Teams First Information Architecture: Overview
- Implementation Phase I: Information Gathering
- Implementation Phase II: Teams First Migration Planning
- Open-Source and Commercial Solutions for IA Migration
- Purview Data Management and Information Protection
- Closing and Q&A

Maturity Model for Leveraging Teams, SharePoint, Email and OneDrive

Scenario 1 - Communications



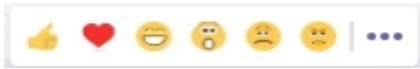
All communication is performed via email; no other messaging tool is used

Text Messaging is used between colleagues

1:1 private chats, incorporation of reactions into chat and conversations

Three or more participants

Reactions



Threaded, contextual conversations that promote history and archived content
@Mentions to draw awareness and attention of others

Scenario 2 - Documents

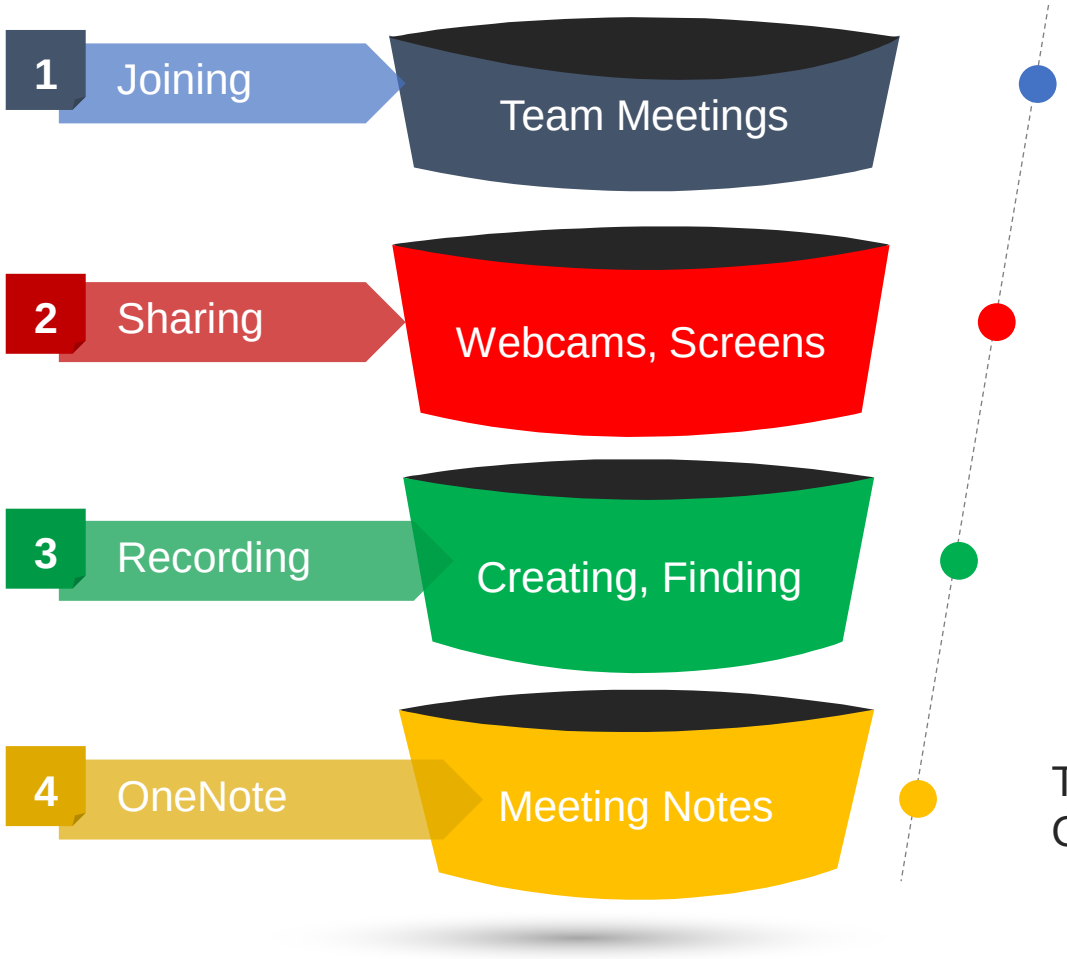
Using local My Documents as a sole source repository for content

Storing documents in a centralized location

Document sharing via links or invitation

Common locations where team members can share and co-author
Can be connected to Teams

Scenario 3 - Meetings



Joining Teams meetings via desktop, web or app to take part in the conversation

Sharing your webcam and screen/app with meeting participants

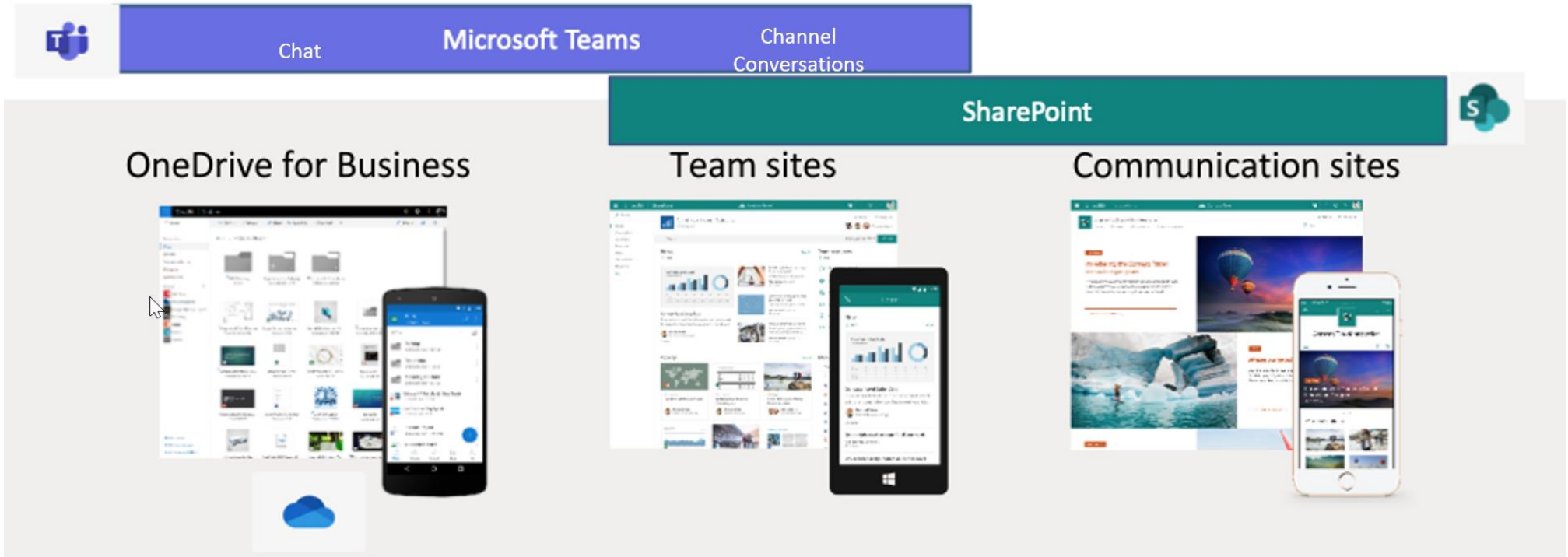
Creating a Stream recording and finding other recorded content

Taking centralized meeting notes in OneNote for all team members to use

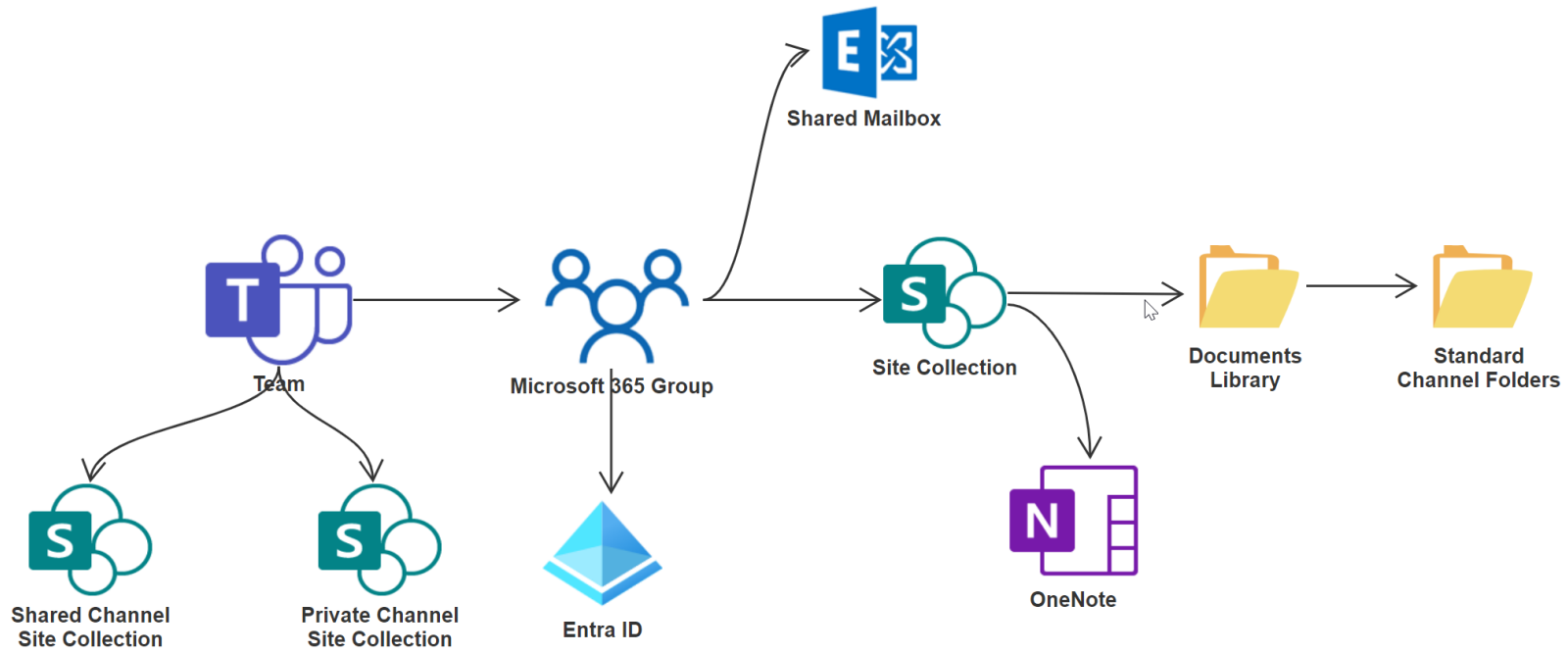
SharePoint Online

- 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

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

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

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

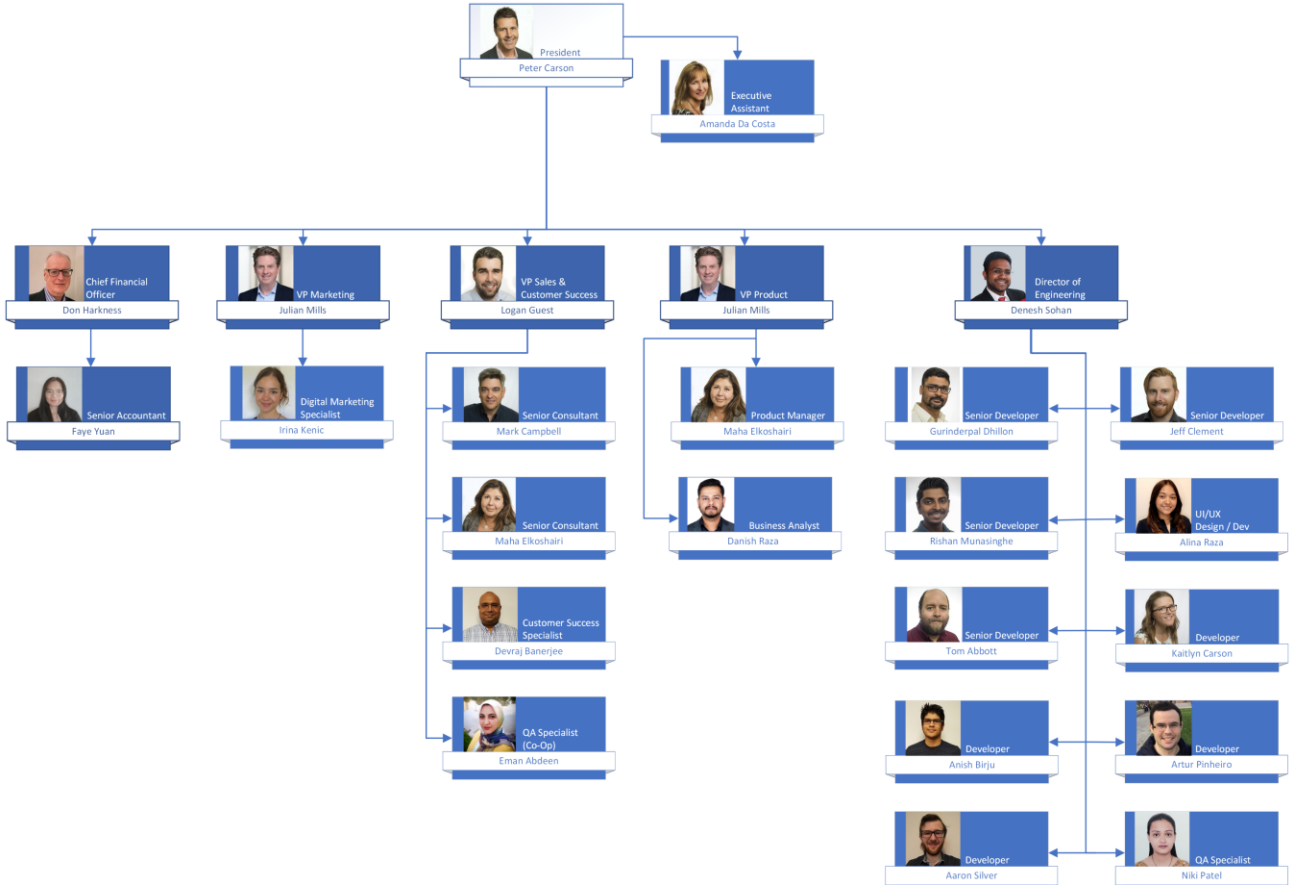
Phase I: Information Gathering

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



Microsoft 365 Usage Reports

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

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

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		

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	

B2B Guests vs. Direct Connect in Teams

B2B Guests

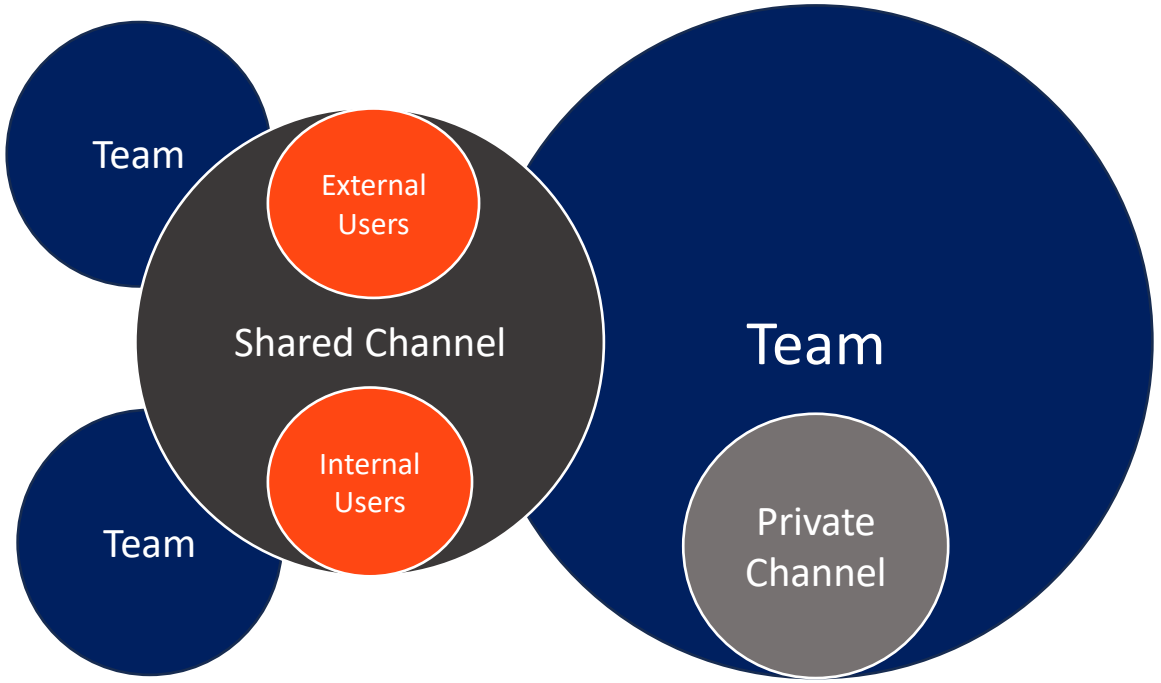
- User exists in the external Team's Azure AD
- All the B2B controls apply
- Guests need to switch their Teams to external tenant
  - Lose their home tenant's Teams, notifications, feeds
- Can use different browser profiles for different tenants
- SharePoint content is easiy accessible

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

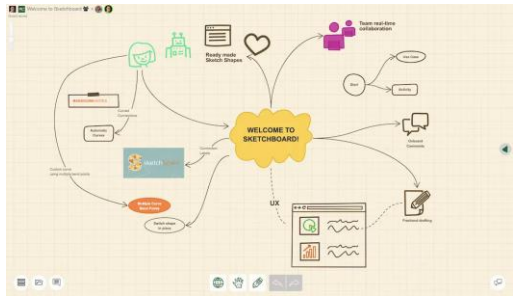
Shared vs. Private Channels

- 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
- Department team that is private to that department
- Outbound connections don't have to be setup for internal



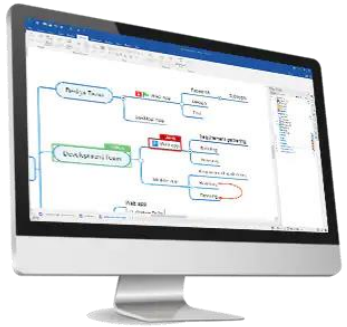
Tools for Planning Your IA

sketchboard



[Sketchboard]

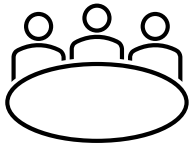
MindManager



[MindManager]

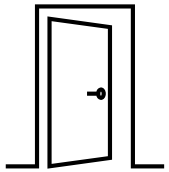
Who Needs Access to Your Information?

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

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

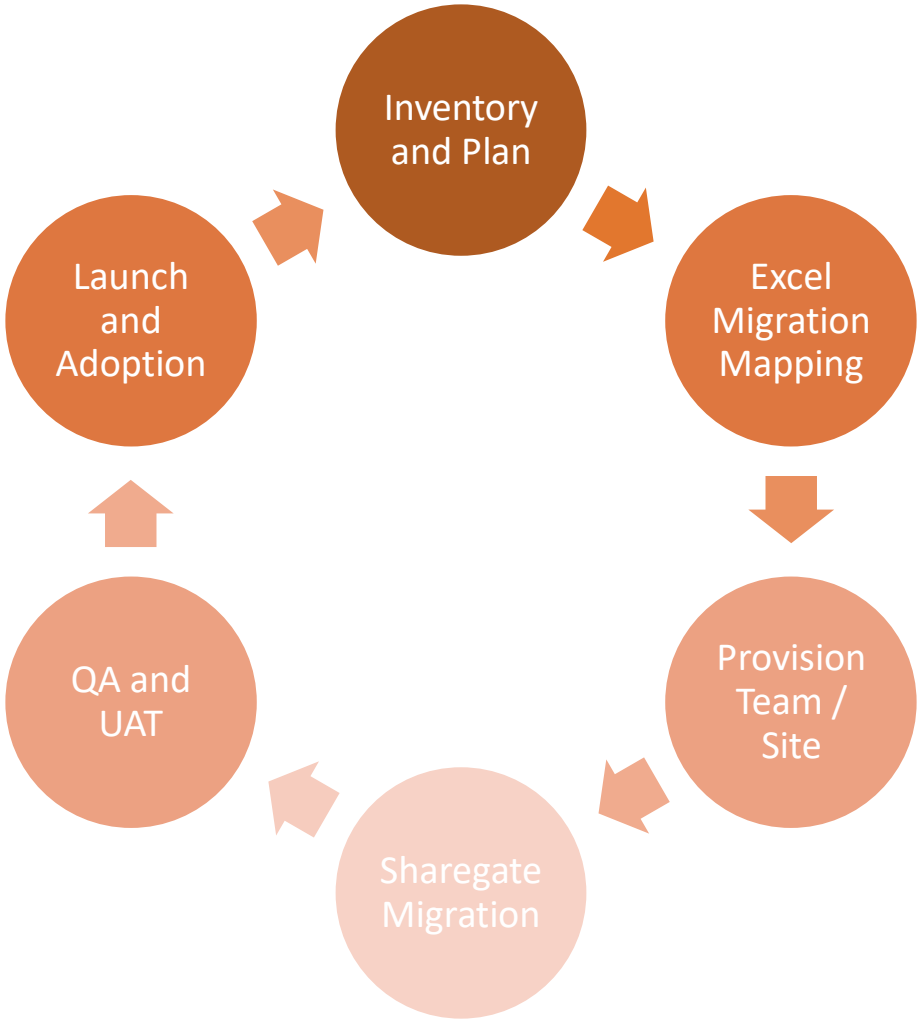
- Organize conversations by topics or projects
- Easier to track and manage discussions

Builds Organizational Knowledge

- History is available to new team members
- Searchable

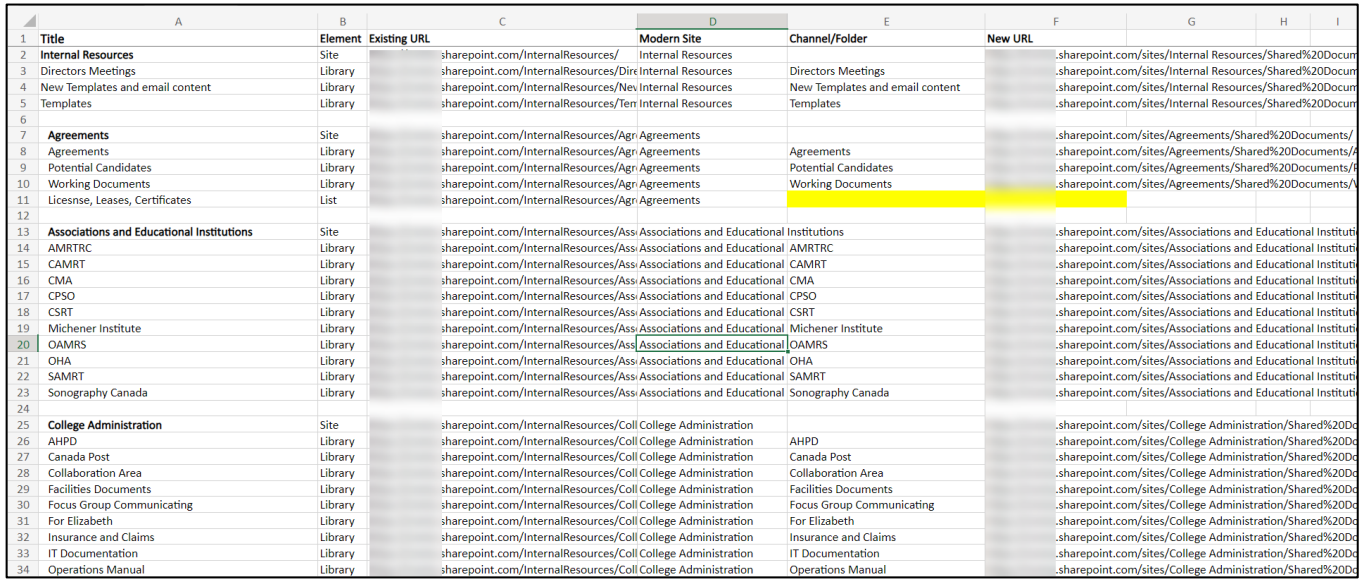
Migration Planning

Teams First SharePoint Migration



Excel Migration Mapping

- After completing your inventory and planning your migration, need to map where your sites, subsites, folders etc. will be stored.
- Oftentimes, there is a lot of information sprawl which can be consolidated into a Team
- Ex. Teams by Department
    - A Finance Team contains all budgeting, financial planning, statements.



	A	B	C	D	E	F
1	**Title**	**Element**	**Existing URL**	**Modern Site**	**Channel/Folder**	**New URL**
2	**Internal Resources**	Site	[redacted]sharepoint.com/InternalResources/	Internal Resources		[redacted].sharepoint.com/sites/Internal Resources/Shared%20Docum
3	Directors Meetings	Library	[redacted]sharepoint.com/InternalResources/Dire	Internal Resources	Directors Meetings	[redacted].sharepoint.com/sites/Internal Resources/Shared%20Docum
4	New Templates and email content	Library	[redacted]sharepoint.com/InternalResources/Nev	Internal Resources	New Templates and email content	[redacted].sharepoint.com/sites/Internal Resources/Shared%20Docum
5	Templates	Library	[redacted]sharepoint.com/InternalResources/Tem	Internal Resources	Templates	[redacted].sharepoint.com/sites/Internal Resources/Shared%20Docum
6						
7	**Agreements**	Site	[redacted]sharepoint.com/InternalResources/Agr	Agreements		[redacted].sharepoint.com/sites/Agreements/Shared%20Documents/
8	Agreements	Library	[redacted]sharepoint.com/InternalResources/Agr	Agreements	Agreements	[redacted].sharepoint.com/sites/Agreements/Shared%20Documents/A
9	Potential Candidates	Library	[redacted]sharepoint.com/InternalResources/Agr	Agreements	Potential Candidates	[redacted].sharepoint.com/sites/Agreements/Shared%20Documents/P
10	Working Documents	Library	[redacted]sharepoint.com/InternalResources/Agr	Agreements	Working Documents	[redacted].sharepoint.com/sites/Agreements/Shared%20Documents/W
11	Licesnse, Leases, Certificates	List	[redacted]sharepoint.com/InternalResources/Agr	Agreements		
12						
13	**Associations and Educational Institutions**	Site	[redacted]sharepoint.com/InternalResources/Ass	Associations and Educational Institutions		[redacted].sharepoint.com/sites/Associations and Educational Institutio
14	AMRTRC	Library	[redacted]sharepoint.com/InternalResources/Ass	Associations and Educational	AMRTRC	[redacted].sharepoint.com/sites/Associations and Educational Institutio
15	CAMRT	Library	[redacted]sharepoint.com/InternalResources/Ass	Associations and Educational	CAMRT	[redacted].sharepoint.com/sites/Associations and Educational Institutio
16	CMA	Library	[redacted]sharepoint.com/InternalResources/Ass	Associations and Educational	CMA	[redacted].sharepoint.com/sites/Associations and Educational Institutio
17	CPSO	Library	[redacted]sharepoint.com/InternalResources/Ass	Associations and Educational	CPSO	[redacted].sharepoint.com/sites/Associations and Educational Institutio
18	CSRT	Library	[redacted]sharepoint.com/InternalResources/Ass	Associations and Educational	CSRT	[redacted].sharepoint.com/sites/Associations and Educational Institutio
19	Michener Institute	Library	[redacted]sharepoint.com/InternalResources/Ass	Associations and Educational	Michener Institute	[redacted].sharepoint.com/sites/Associations and Educational Institutio
20	OAMRS	Library	[redacted]sharepoint.com/InternalResources/Ass	Associations and Educational	OAMRS	[redacted].sharepoint.com/sites/Associations and Educational Institutio
21	OHA	Library	[redacted]sharepoint.com/InternalResources/Ass	Associations and Educational	OHA	[redacted].sharepoint.com/sites/Associations and Educational Institutio
22	SAMRT	Library	[redacted]sharepoint.com/InternalResources/Ass	Associations and Educational	SAMRT	[redacted].sharepoint.com/sites/Associations and Educational Institutio
23	Sonography Canada	Library	[redacted]sharepoint.com/InternalResources/Ass	Associations and Educational	Sonography Canada	[redacted].sharepoint.com/sites/Associations and Educational Institutio
24						
25	**College Administration**	Site	[redacted]sharepoint.com/InternalResources/Coll	College Administration		[redacted].sharepoint.com/sites/College Administration/Shared%20Do
26	AHPD	Library	[redacted]sharepoint.com/InternalResources/Coll	College Administration	AHPD	[redacted].sharepoint.com/sites/College Administration/Shared%20Do
27	Canada Post	Library	[redacted]sharepoint.com/InternalResources/Coll	College Administration	Canada Post	[redacted].sharepoint.com/sites/College Administration/Shared%20Do
28	Collaboration Area	Library	[redacted]sharepoint.com/InternalResources/Coll	College Administration	Collaboration Area	[redacted].sharepoint.com/sites/College Administration/Shared%20Do
29	Facilities Documents	Library	[redacted]sharepoint.com/InternalResources/Coll	College Administration	Facilities Documents	[redacted].sharepoint.com/sites/College Administration/Shared%20Do
30	Focus Group Communicating	Library	[redacted]sharepoint.com/InternalResources/Coll	College Administration	Focus Group Communicating	[redacted].sharepoint.com/sites/College Administration/Shared%20Do
31	For Elizabeth	Library	[redacted]sharepoint.com/InternalResources/Coll	College Administration	For Elizabeth	[redacted].sharepoint.com/sites/College Administration/Shared%20Do
32	Insurance and Claims	Library	[redacted]sharepoint.com/InternalResources/Coll	College Administration	Insurance and Claims	[redacted].sharepoint.com/sites/College Administration/Shared%20Do
33	IT Documentation	Library	[redacted]sharepoint.com/InternalResources/Coll	College Administration	IT Documentation	[redacted].sharepoint.com/sites/College Administration/Shared%20Do
34	Operations Manual	Library	[redacted]sharepoint.com/InternalResources/Coll	College Administration	Operations Manual	[redacted].sharepoint.com/sites/College Administration/Shared%20Do

Teams and Sites Provisioning

- Automate the creation of Teams and Sites
- Based on Teams and Sites Templates
- Project Teams
- Department Teams
- Integrate OneNote and Planner in Templates
- Full Lifecycle including retention and deletion

SysKit

ProvisionPoint

Orchestry

Rencore

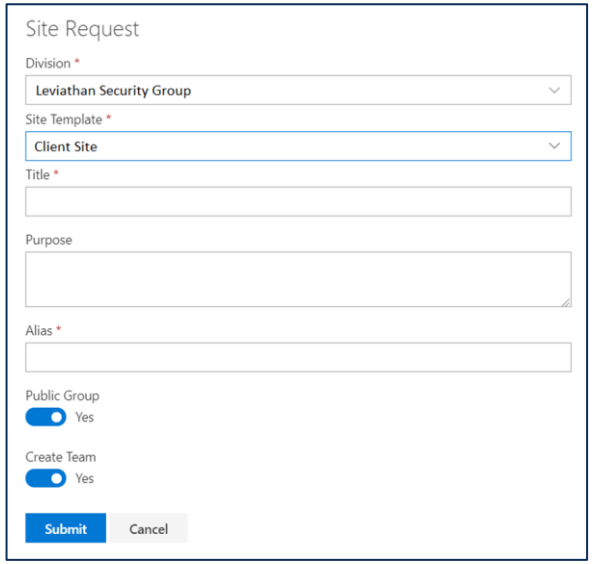
AvePoint®

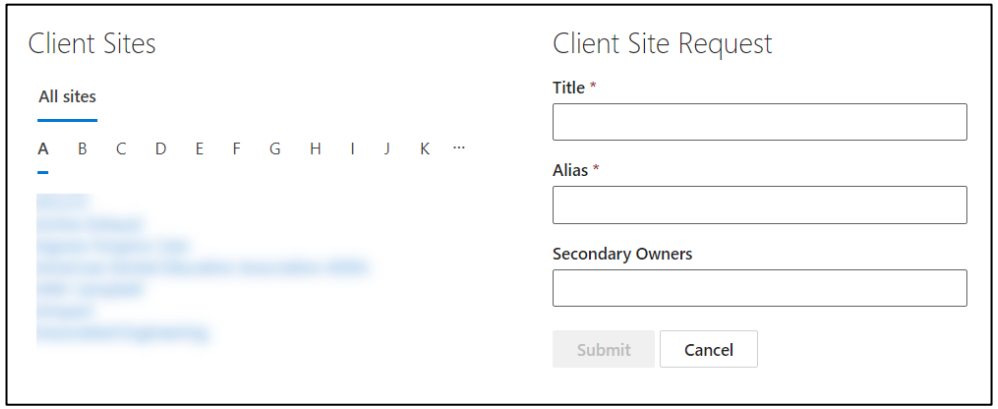
bindtuning

ShareGate:

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



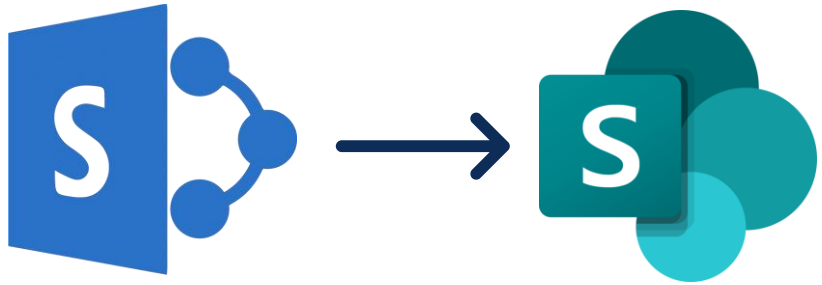


[Teams Provisioning | Envision IT]

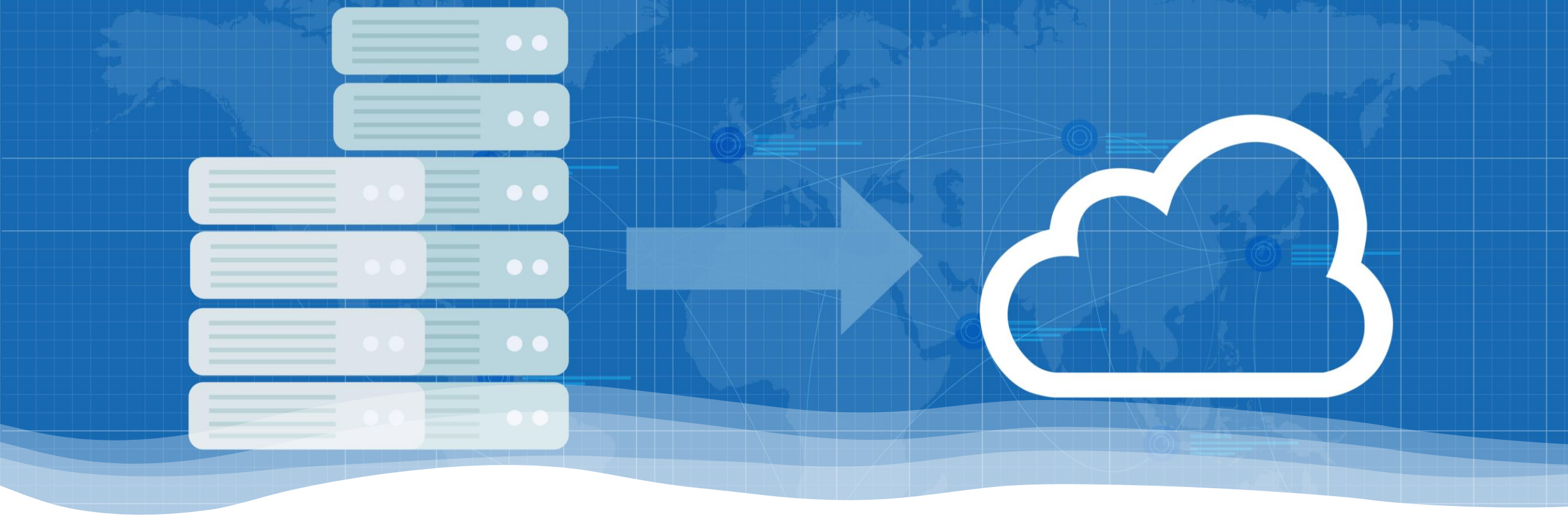
Migration Tools

ShareGate Desktop

[ShareGate Desktop]



SharePoint Online Migration Tool



SharePoint Online Migration

- Aligning IA from previous on-prem site structure to Microsoft 365 structure is extremely important
- Teams and SharePoint Online modern site structure
- ShareGate used to manage migration process
- Ideal time to evaluate all content and reorganize, update or prune as appropriate

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

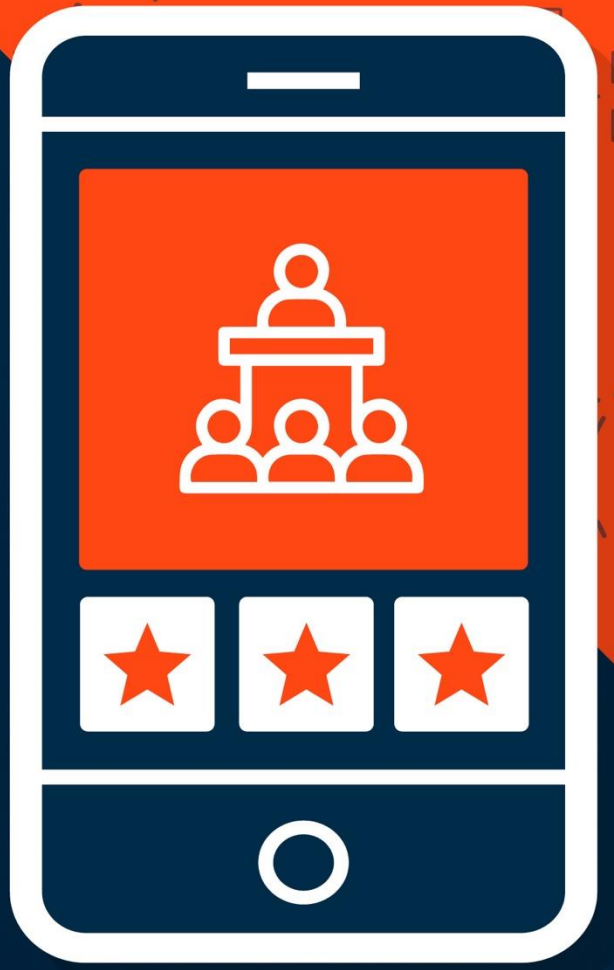
Information Protection

- 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

Useful Links

- Open Source Approach to Teams Provisioning
- Power BI Azure AD Users and Groups Dashboard | Extranet User Manager
- Azure AD and Microsoft 365 Security Fundamentals
- EUM Demo

Please rate this session on the app



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