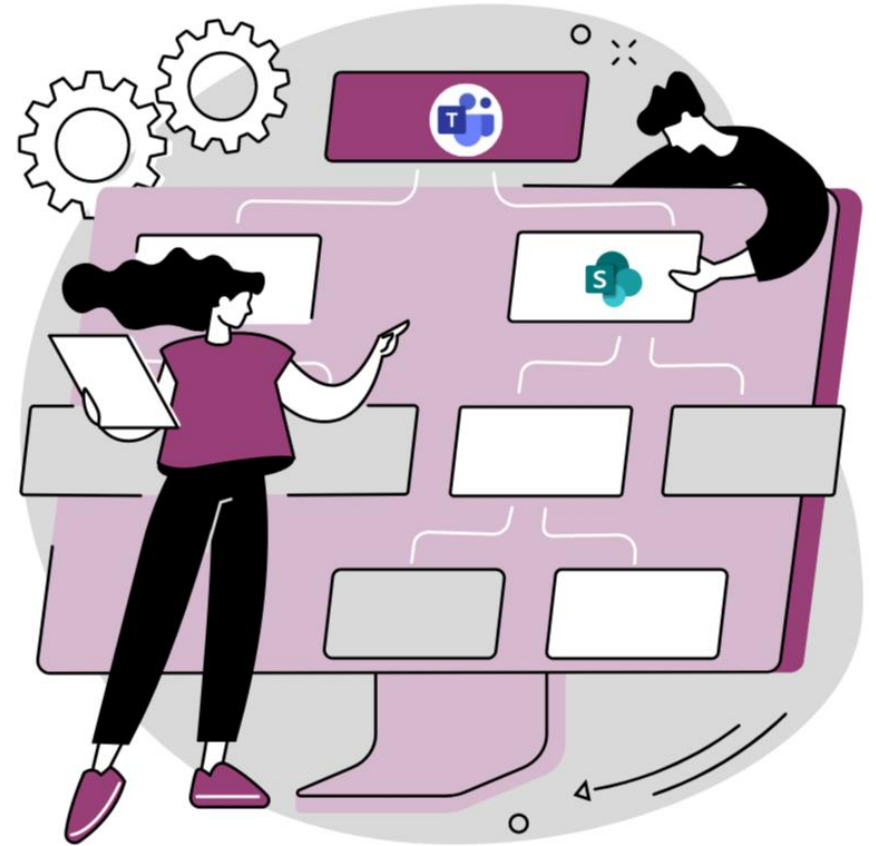


Teams First Information Architecture & Governance

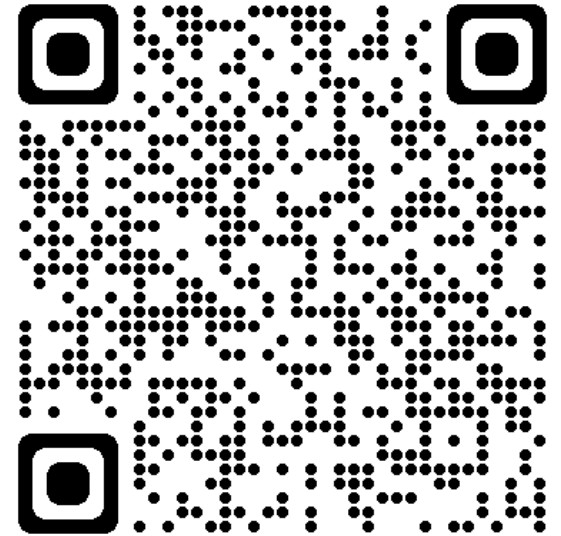
April 6 2024 | 3-3:50 PM EST



Peter Carson



- President, Envision IT and Extranet User Manager
- 13-time M365 Microsoft MVP
- President, Toronto Microsoft 365 User Group
- blog.petercarson.ca
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- extranetusermanager.com
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- To be eligible for prizes make sure to get your bingo card stamped by ALL sponsors
- Raffle at the end of the day and you must be present to win!

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Microsoft 365 Information Architecture



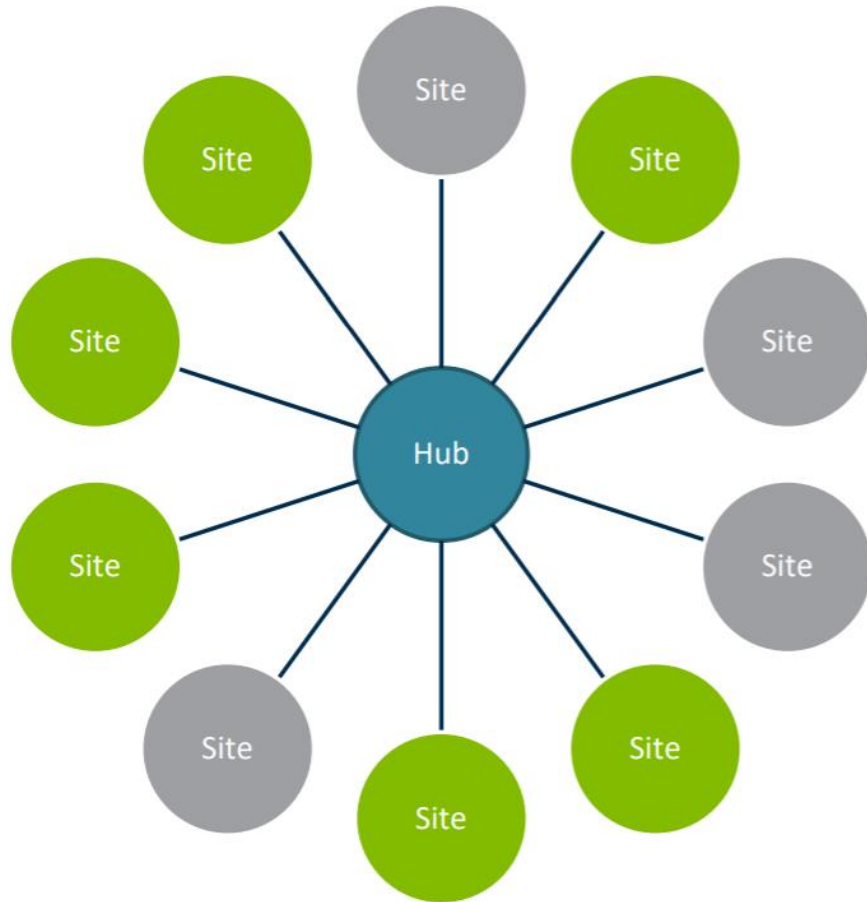
- Organizing content in a way that's easy to find and use
- Aligns with business needs and objectives
- Provides a consistent user experience
- Facilitates collaboration and communication

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



Copilot Readiness



- Copilot will leverage everything the user has access to
- Is there content people shouldn't see?
- Don't depend on security through obscurity

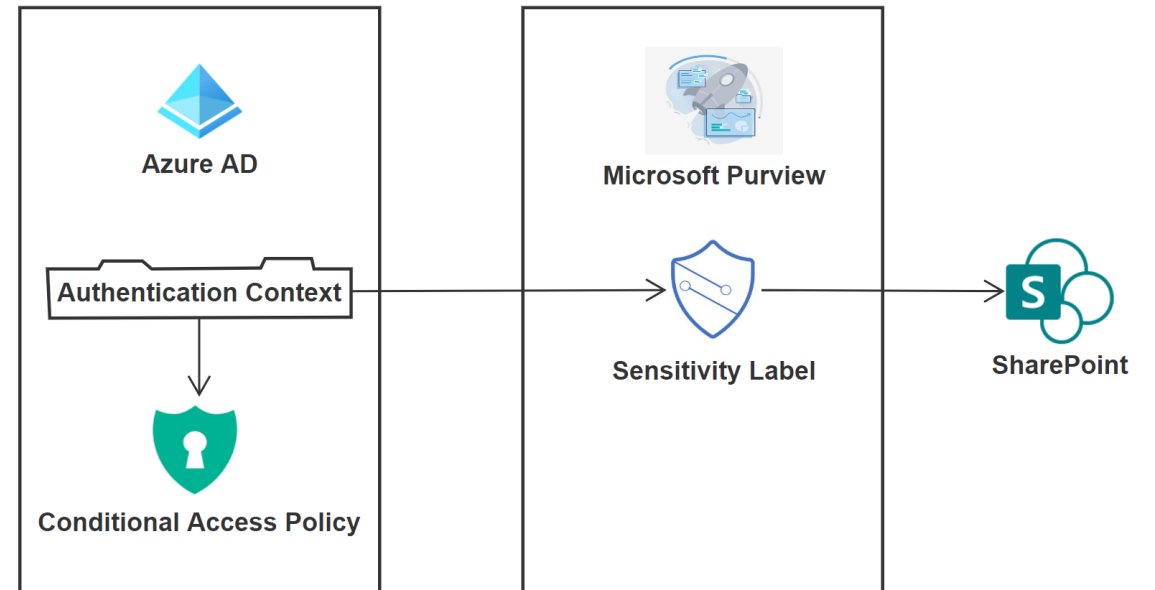
Microsoft Purview



- Unified Data Governance
- Data Security
- Data Governance
- Risk and Compliance
- Privacy Risk Management

Sensitivity Labels

- Labels can be applied to content in Microsoft 365
 - Emails
 - SharePoint sites and content
- Can be manually or automatically applied
- Can be leveraged in conditional access policies
- Can also enforce rights management and encryption
- Travels with the content regardless of location
- Can be applied to sharing rules



Traffic Light Protocol



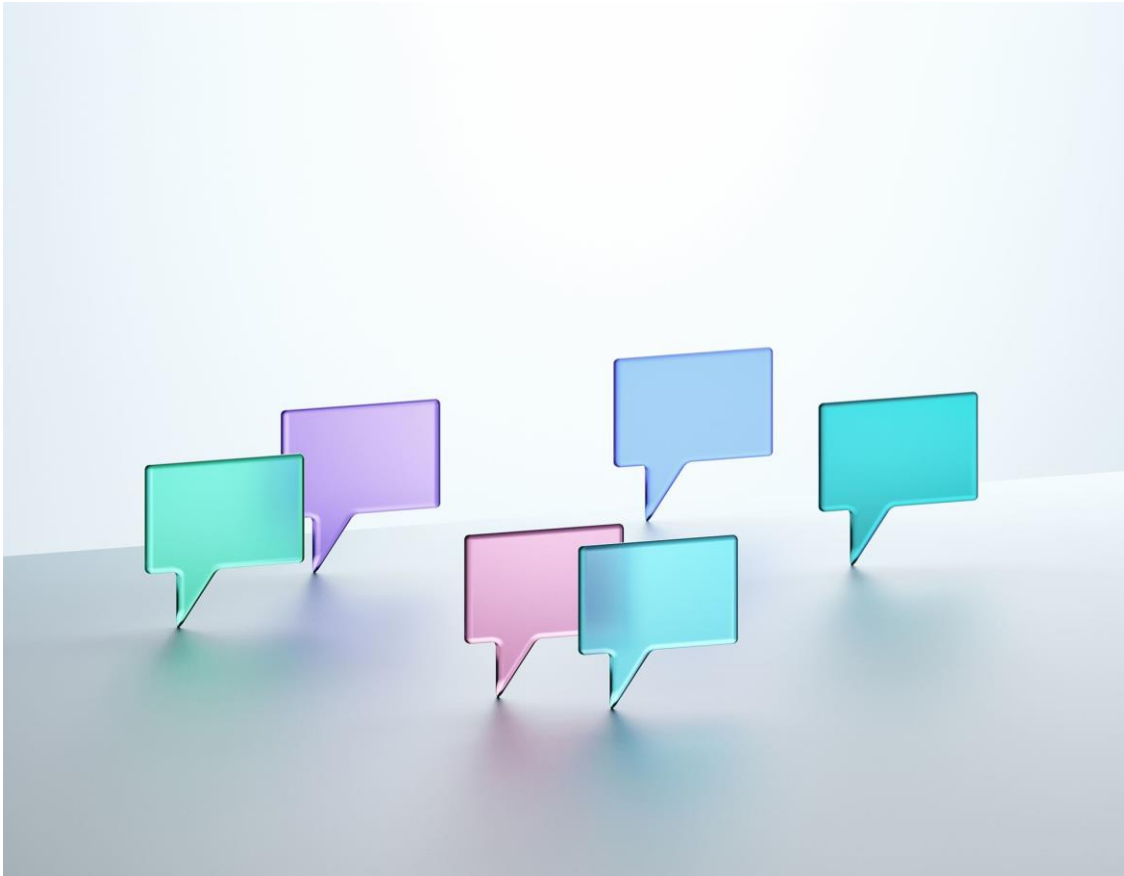
TLP	External Access	Guests Require MFA	Document Encryption	M365 Member Licensing
Red+Strict	No	N/A	Yes	E5
Red	Yes	Yes	Yes	E5
Amber+Strict	No	N/A	No	E3
Amber	Yes	Yes	No	E3
Green	Yes	No	No	E3
Clear	Yes	No	No	

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?

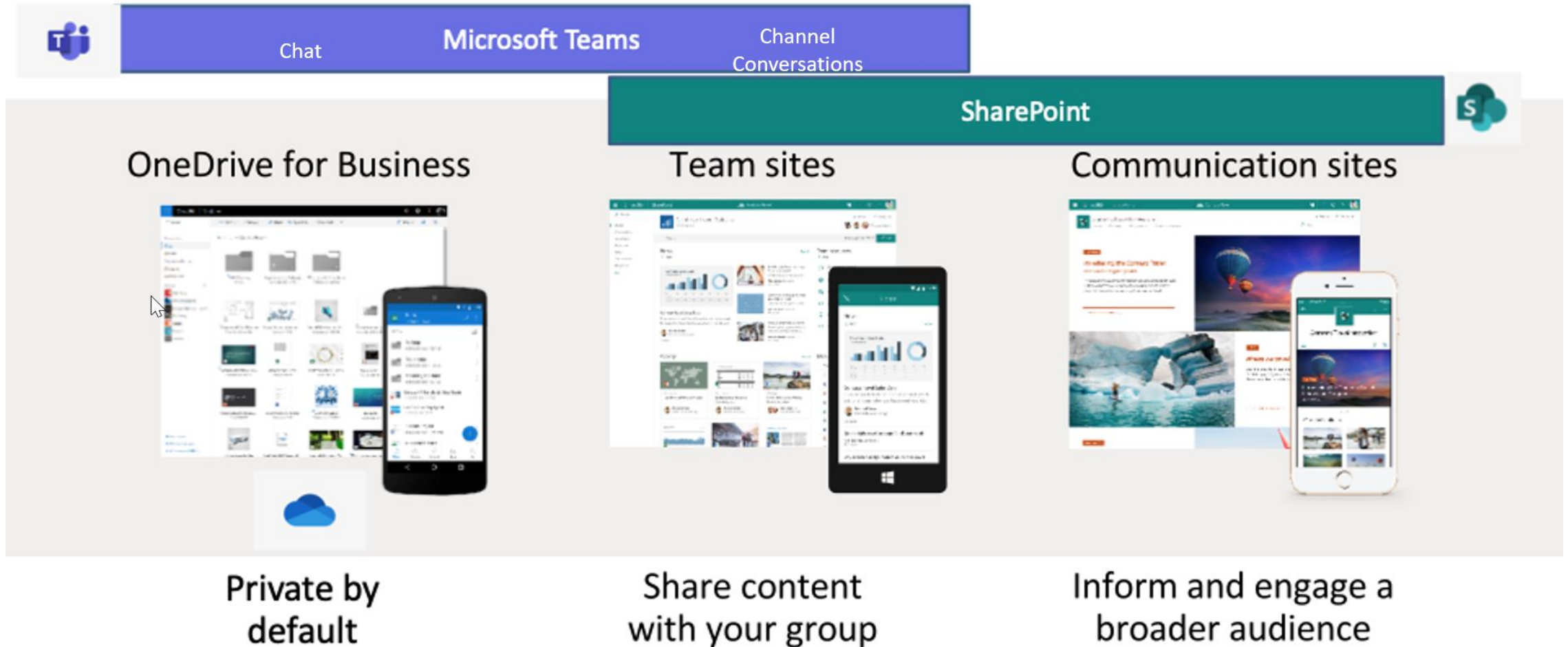
John: Yes, we are. See you there.

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

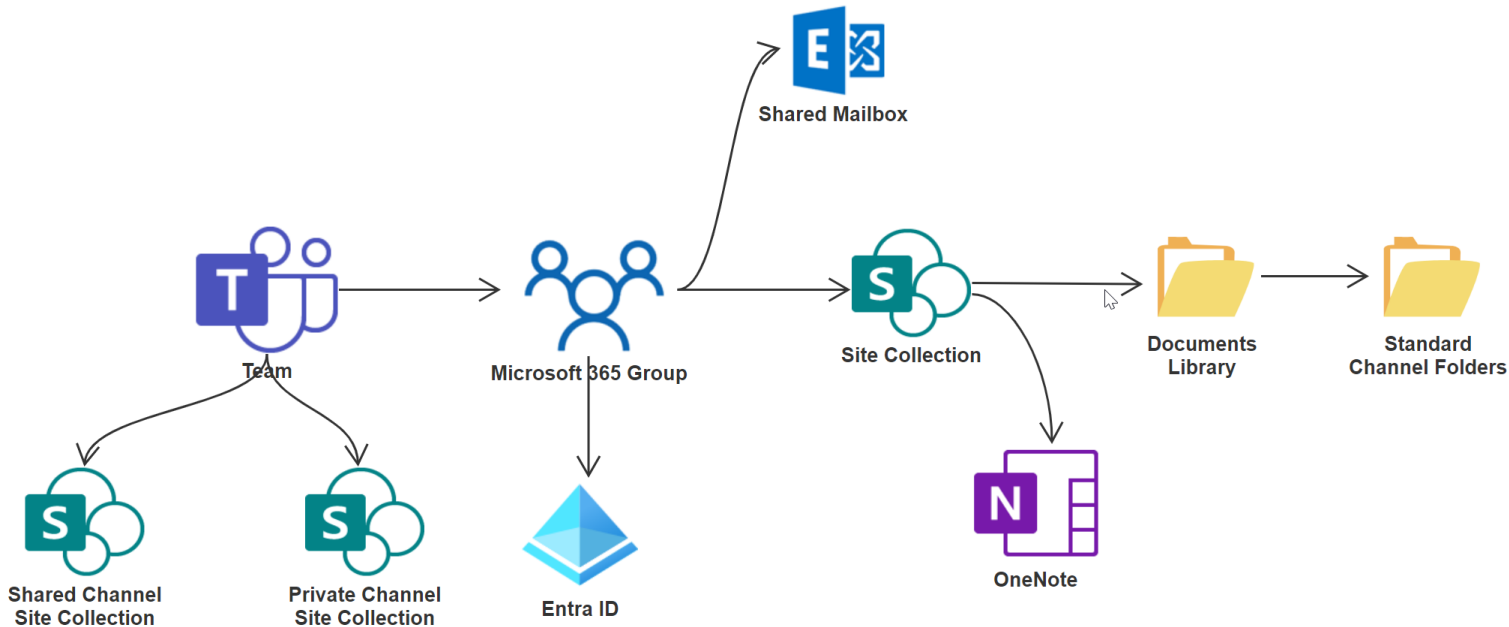
Mike: Sorry about that.

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
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



B2B Guests vs. Direct Connect in Teams

B2B Guests

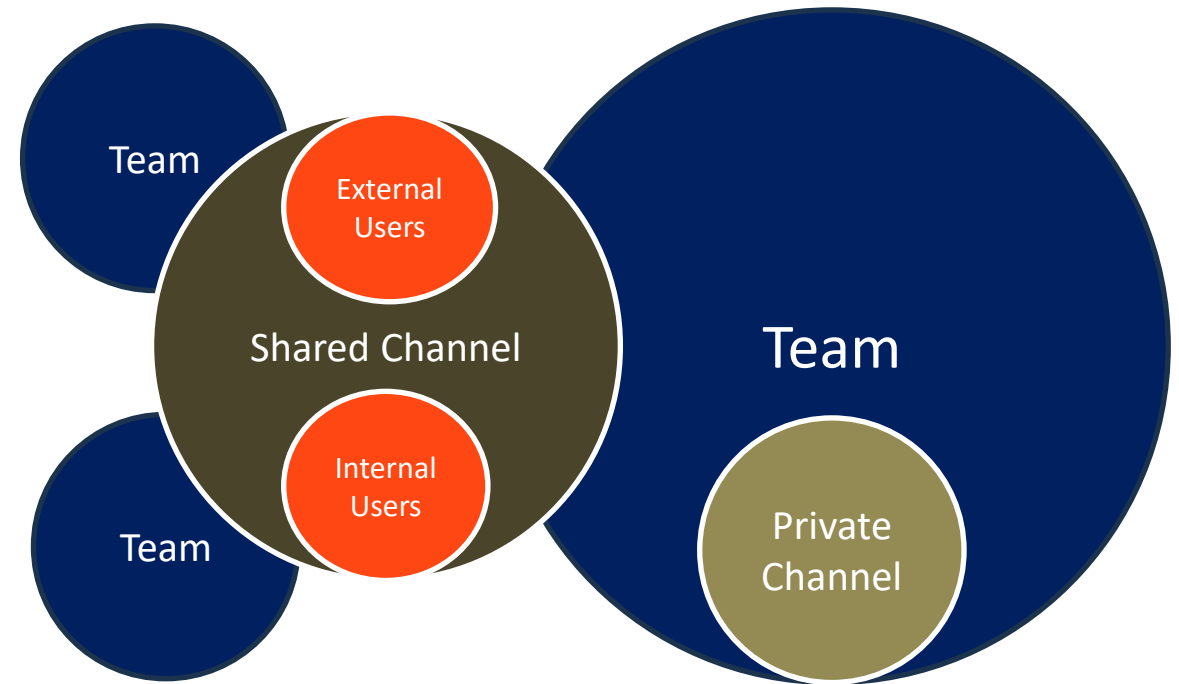
- User exists in the external Team's Azure AD
- All the B2B controls apply
- Guests need to switch their Teams to external tenant
 - Lose their home tenant's Teams, notifications, feeds
- Can use different browser profiles for different tenants
- SharePoint content is easily accessible

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

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



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?

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

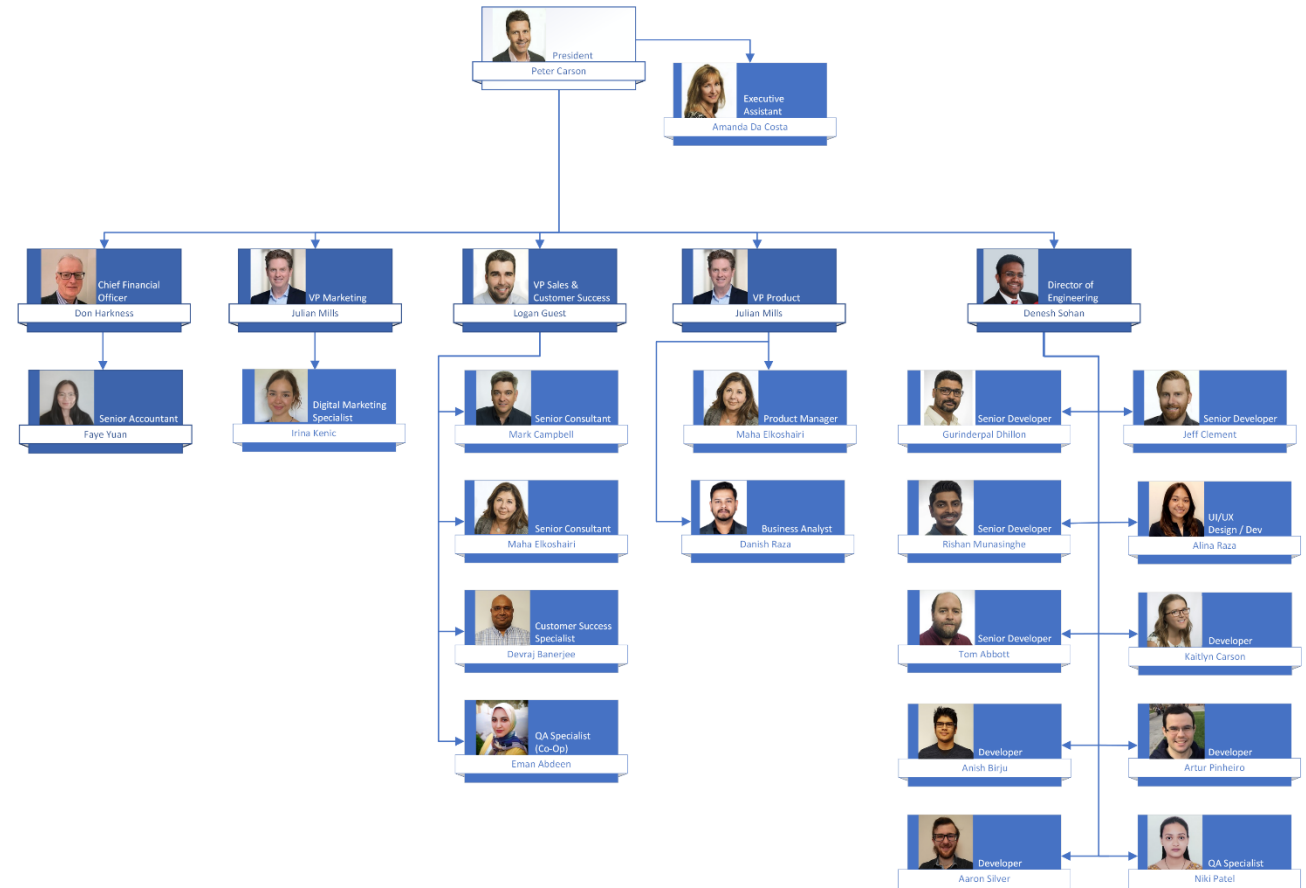
Phase I: Information Gathering

Information Gathering

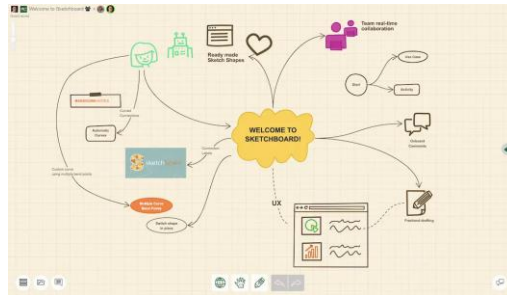
- The first step is to understand the way your organization works
- Identify operational and department processes that require documentation
 - Current organizational chart **
 - M365 Usage Reports (Teams, Email, Document Management)**
 - Inventory (Teams, SharePoint Sites and Files, File Shares, SaaS,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

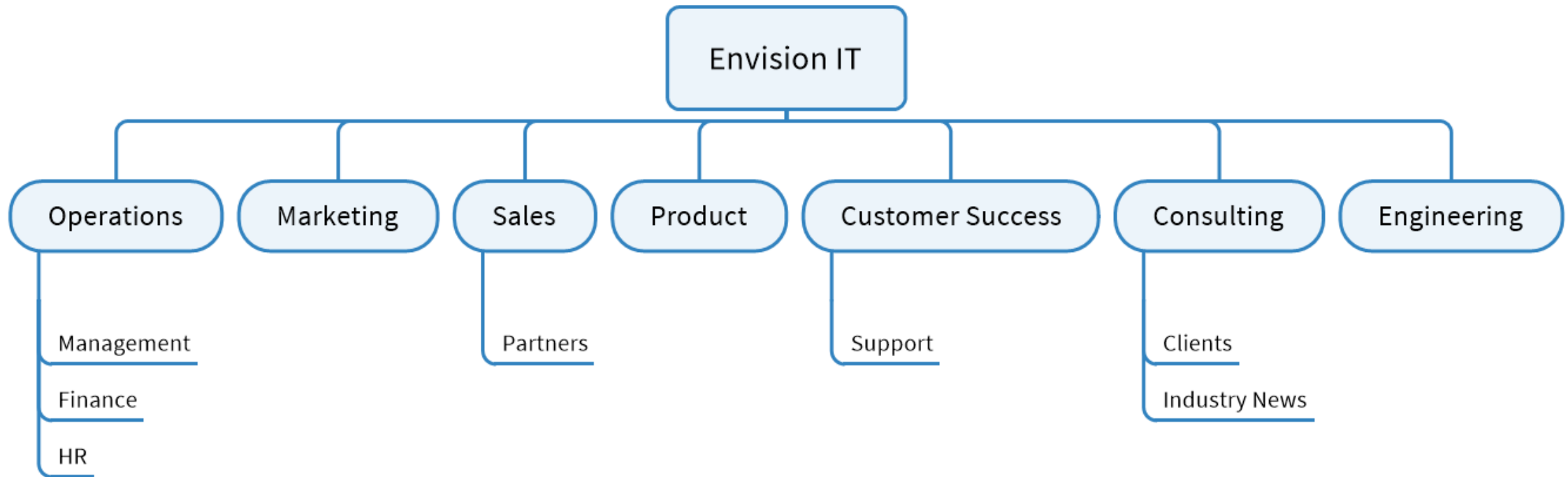


[Sketchboard](#)

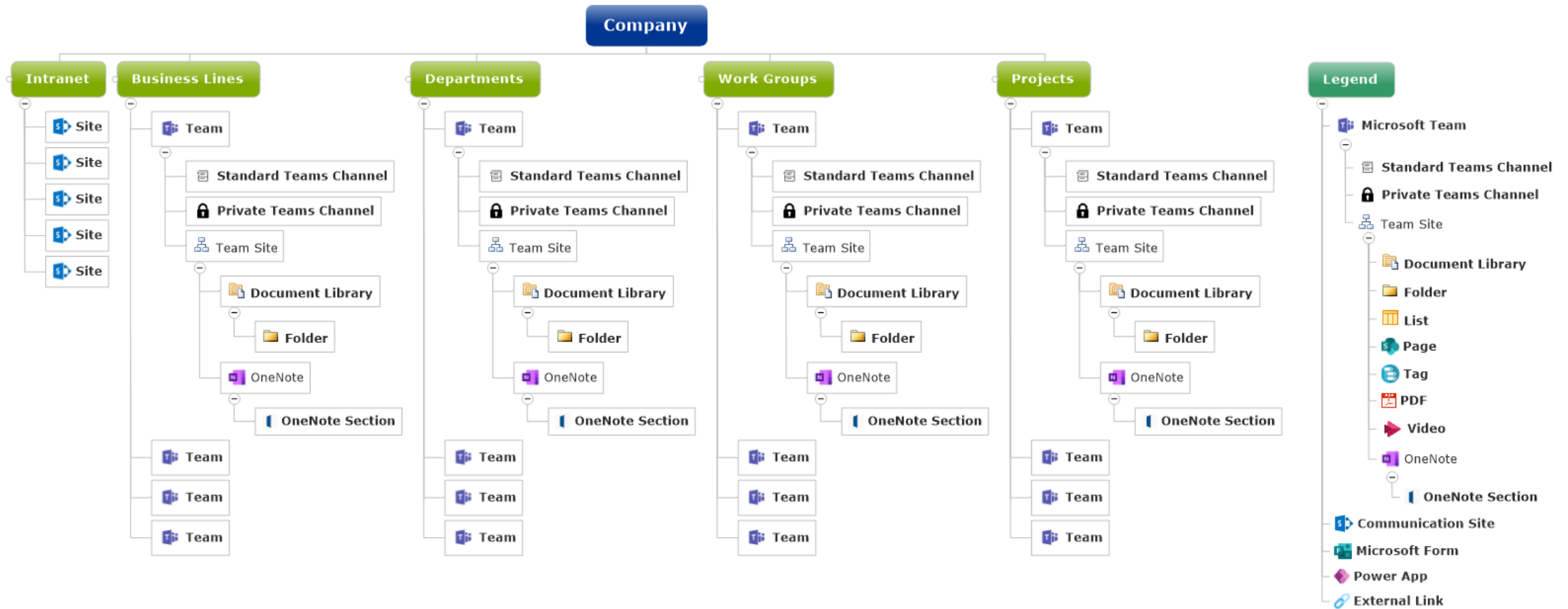


[MindManager](#)

Envision IT IA

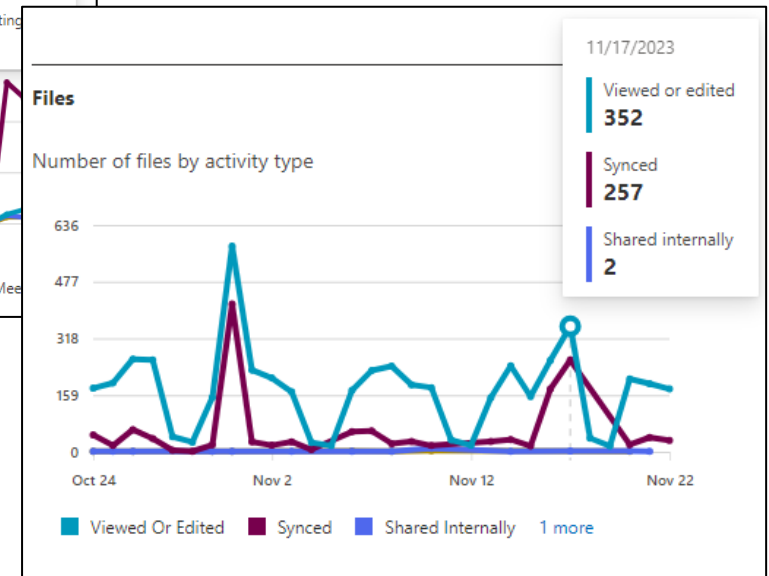
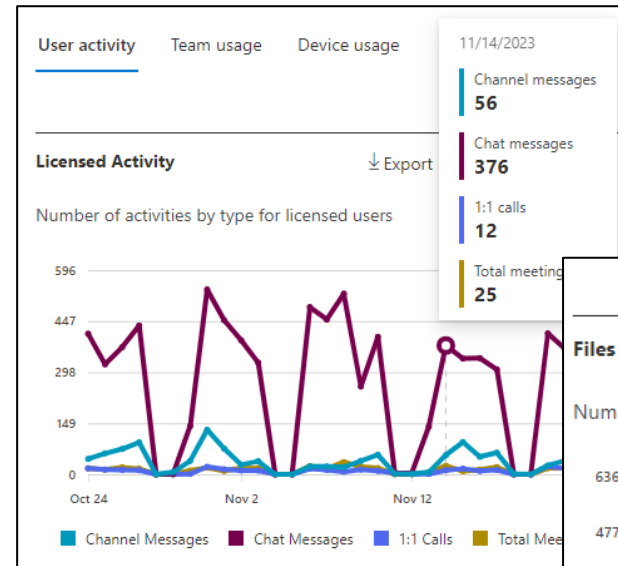


Information Architecture Sample



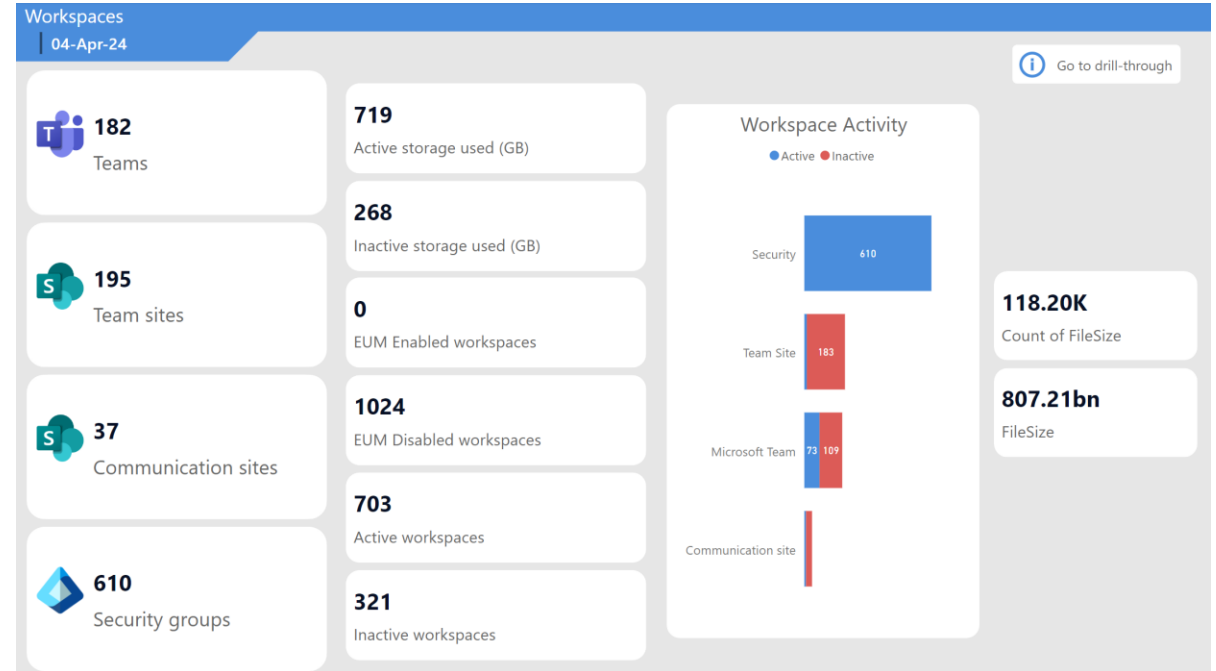
Microsoft 365 Usage Reports

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



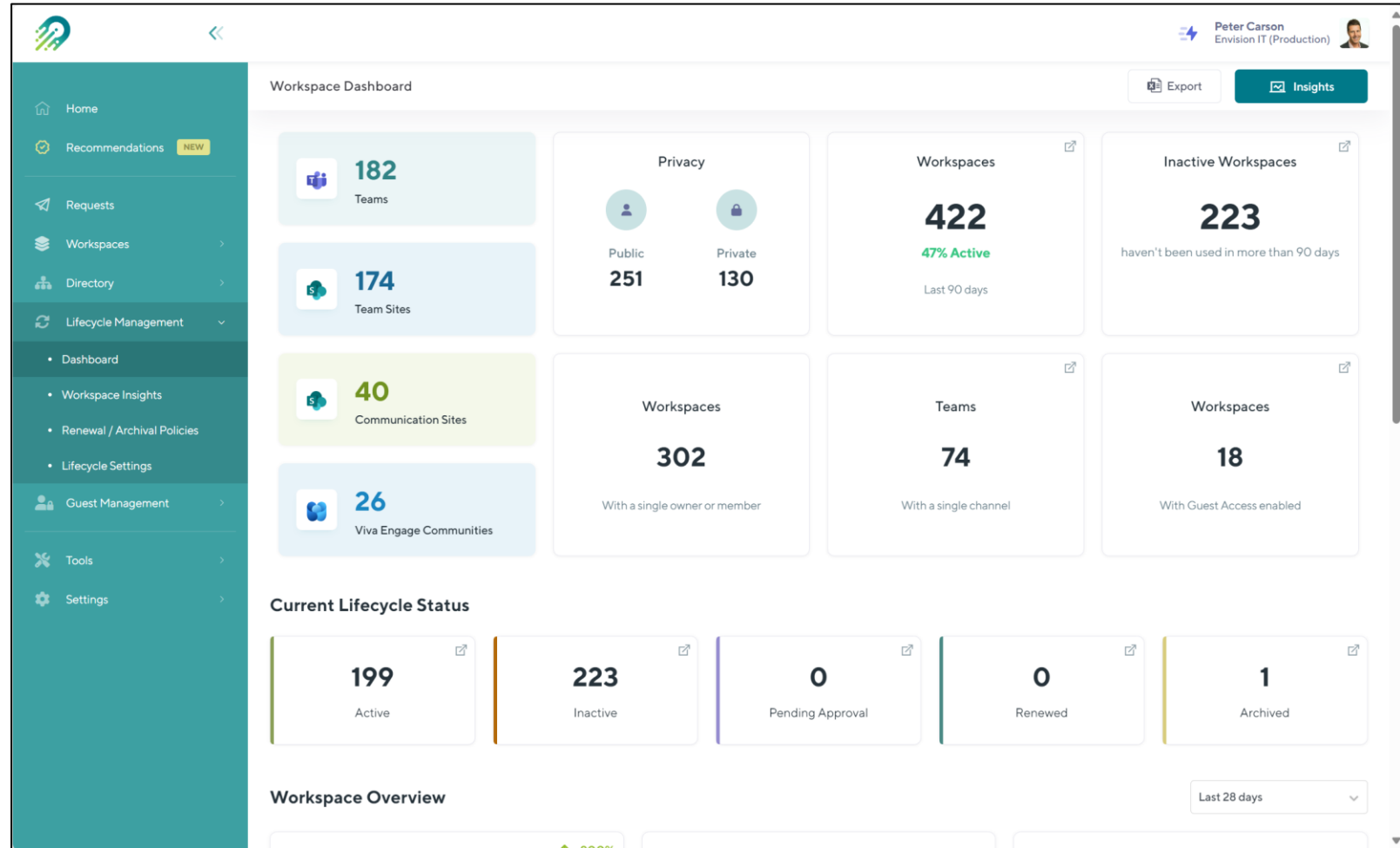
Open-Source Workspace Analysis

- 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



Orchestry Teams and M365 Governance

- Adoption Tools
- Engaging Templates
- Lifecycle Management
- Transparent Governance
- Guest User Management



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

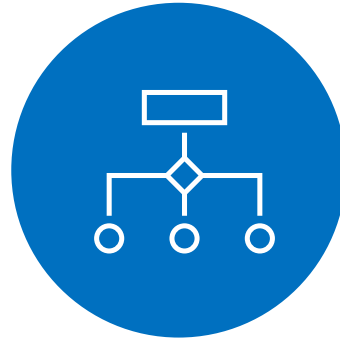
- Ideal for medium-large organizations
- Announcements handled by a designated comms/HR team

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

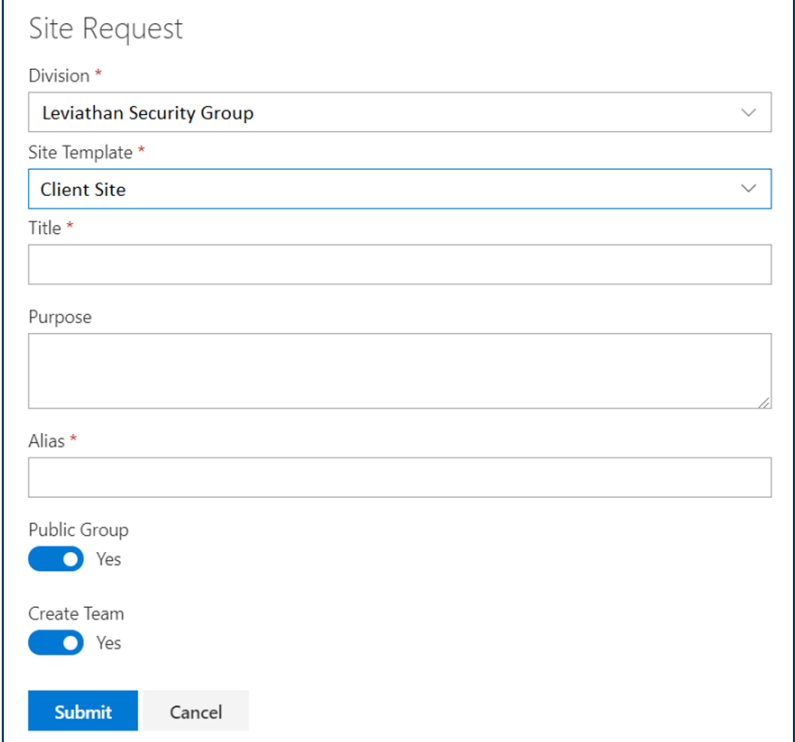
Teams and Sites Provisioning

- 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](#)



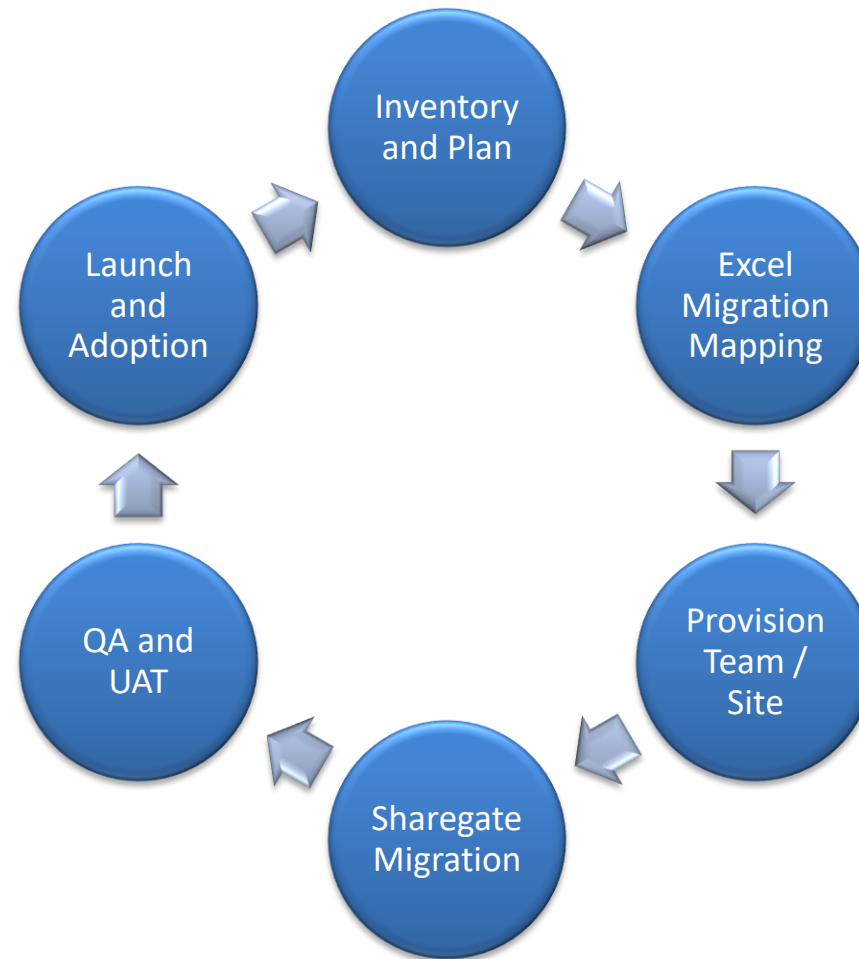
The screenshot shows a 'Site Request' form with the following fields and controls:

- Division ***: A dropdown menu with 'Leviathan Security Group' selected.
- Site Template ***: A dropdown menu with 'Client Site' selected.
- Title ***: An empty text input field.
- Purpose**: A larger empty text area for describing the site's purpose.
- Alias ***: An empty text input field.
- Public Group**: A toggle switch currently turned 'Yes'.
- Create Team**: A toggle switch currently turned 'Yes'.
- Submit**: A blue button to submit the request.
- Cancel**: A grey button to cancel the request.

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

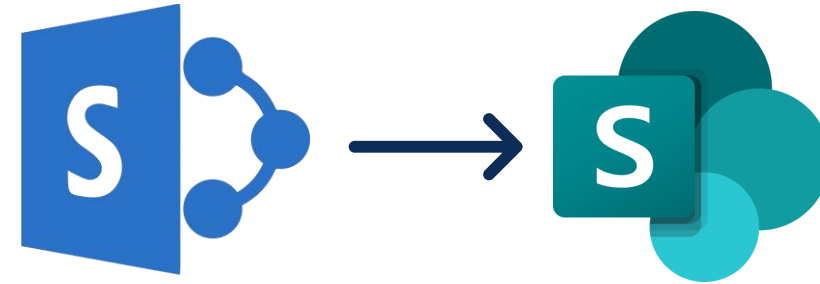
Teams First SharePoint Migration



Migration Tools

ShareGate:
Desktop

[ShareGate Desktop](#)



**SharePoint Online
Migration Tool**

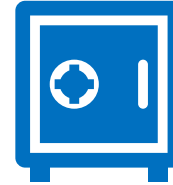
Other Topics

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](#)
- [Power BI Azure AD Users and Groups Dashboard | Extranet User Manager](#)

Spring 2024 Events



M365 Conference, Orlando
EUM V7 Launch



Commsverse 2024
UK



European Collab Summit
Wiesbaden, Germany



Teams First IA
Webinar: Feb 14

European
Power Platform
Conference

European Power Platform
Conference
Brussels, Belgium



EUM Data Room
Webinar: March 27

eum.co/resources/events

Evaluations – Session 5 - 3:00-3:50pm

- Speaker Evaluations



- Event Evaluations



Thank you!
Any Questions?

