

Teams First Information Architecture and Governance

Thursday November 2nd, 2023

1:20 – 1:30 pm

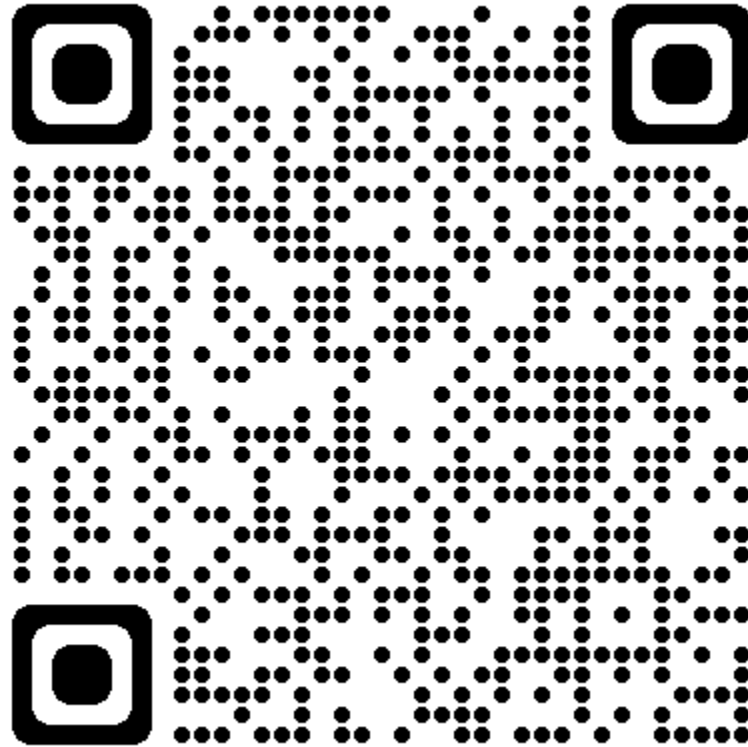
Introductions: Peter Carson



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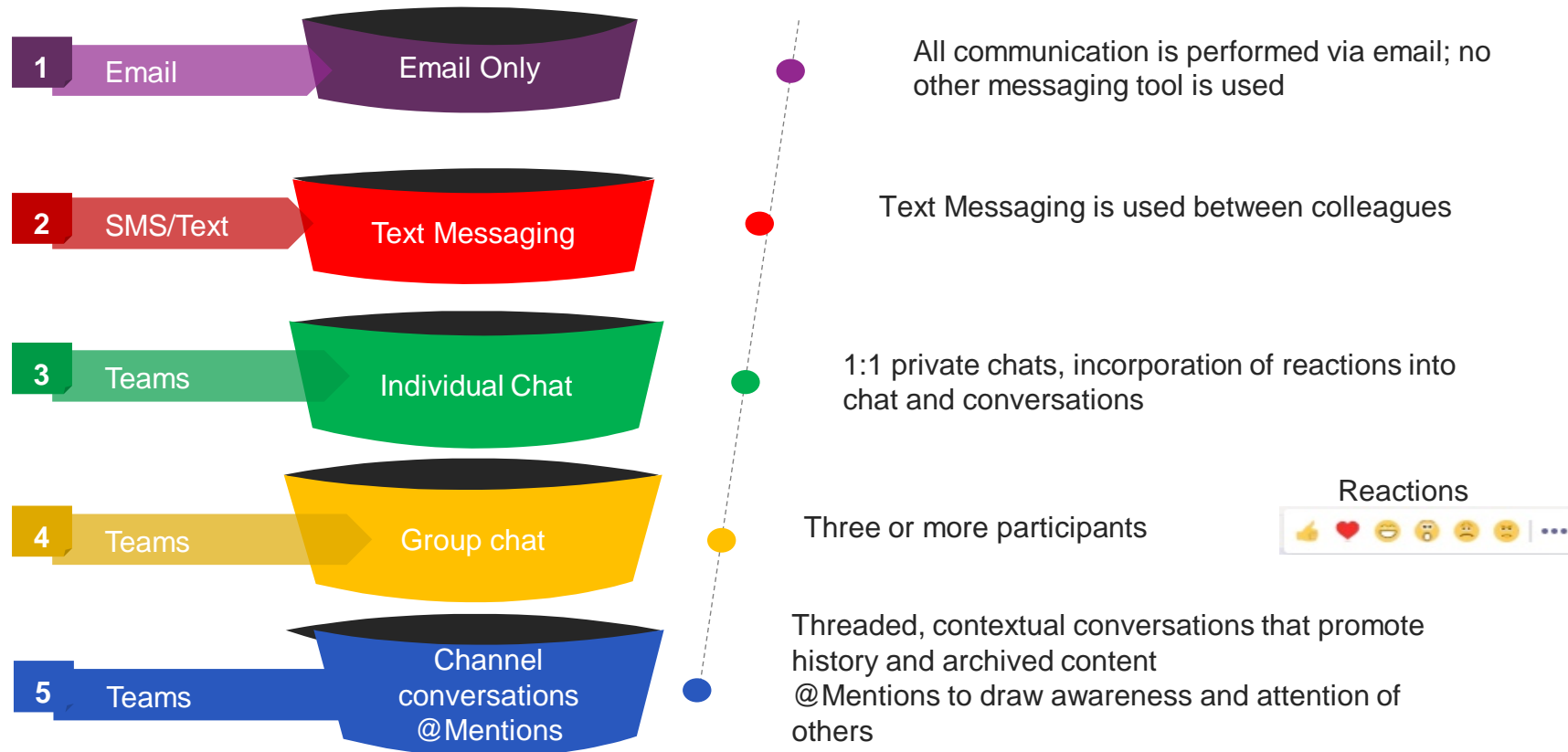
Presentation Download



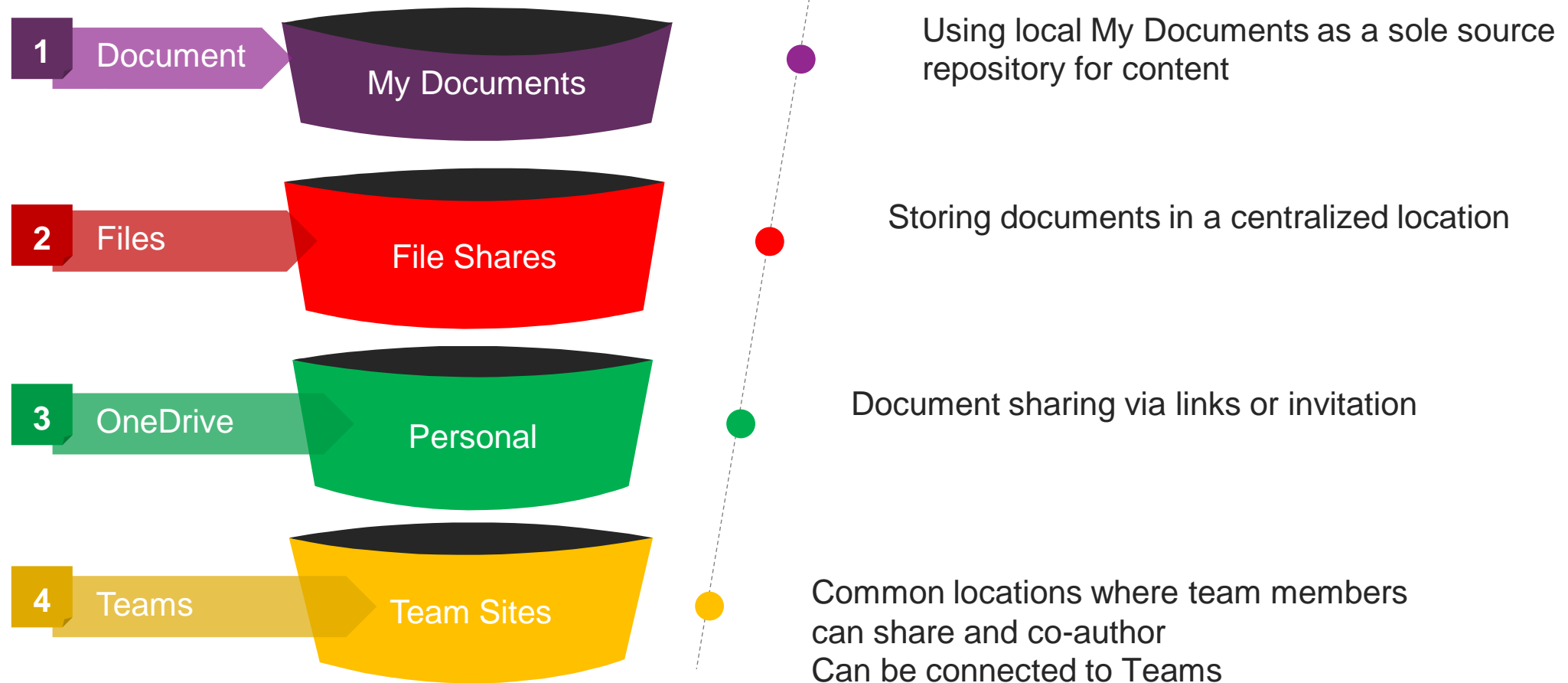
Agenda

- Maturity Model for leveraging Teams, SharePoint, Email and OneDrive
- Comparing Teams Channel types and their site collections
- Where do standalone communication and Team Sites fit in?
- Guests versus B2B Direct Connect
- Open-Source Solutions for analyzing and optimizing your IA
- Summary, Q&A and Closing

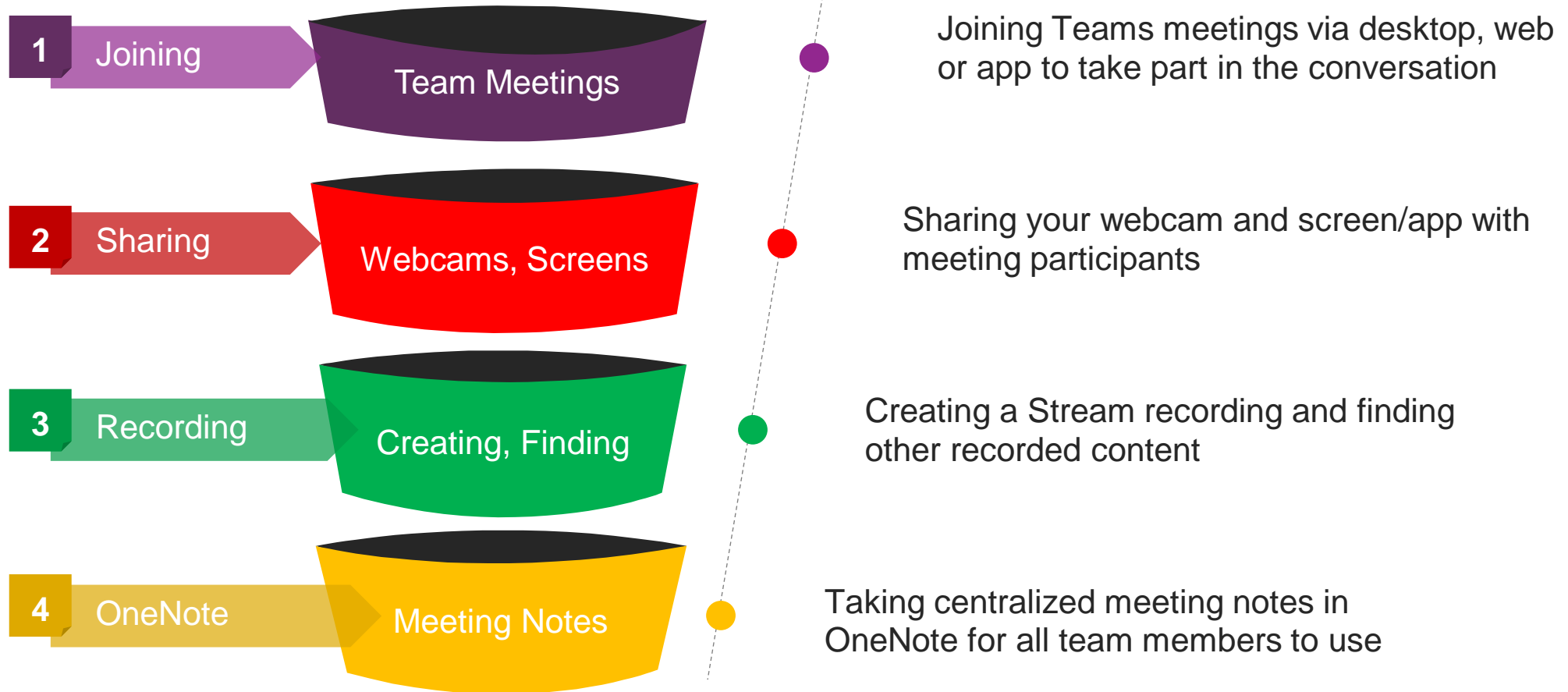
Scenario 1 - Communications



Scenario 2 - Documents



Scenario 3 - Meetings



Top 10 Teams Steps

1. Start with chat

Create a small group chat to communicate in the moment. Rename the chat and 'favorite' easy reference.

2. Connect from anywhere

Download the Microsoft Teams desktop and mobile apps to enable teamwork from anywhere.

3. Go big

Create larger teams with dedicated channels to collaborate on specific topics, projects, disciplines—whatever you like. Better to have fewer, larger teams with more channels than many, small teams with few channels.

4. Customize channels

Upload files to a channel and pin frequently used files to make it easy for everyone to find.

5. Add apps to channels

Integrate favorite apps and services—like Word, PowerPoint, Excel, Power BI, Planner, SurveyMonkey, HootSuite and more—with team chats and meetings.

6. Consolidate 'need to know' content

Use OneNote or Wiki features to spotlight important content, meeting notes, best practices, and goals without cluttering conversations.

7. Spotlight resources

Pin key websites used to track news, performance, live site monitoring or metric tracking.

8. Elevate email conversations

Forward an email to a Teams channel to get faster feedback within a threaded chat—attachments will upload automatically, ready for collaboration and co-authoring.

9. Share content from other services

Set up connectors to push rich content into Microsoft Teams from services like Trello, GitHub, Bing News, or Twitter; and get notified when users engage with that service.

10. Help foster active channels

Stay active in channels and **@team** to highlight posts for the whole group.

Critical Rules of Engagement



Activity Feed becomes your new Inbox



Set parameters around chat, conversations and reactions



@mention to draw awareness



Acknowledgements are the Microsoft Teams read-receipt



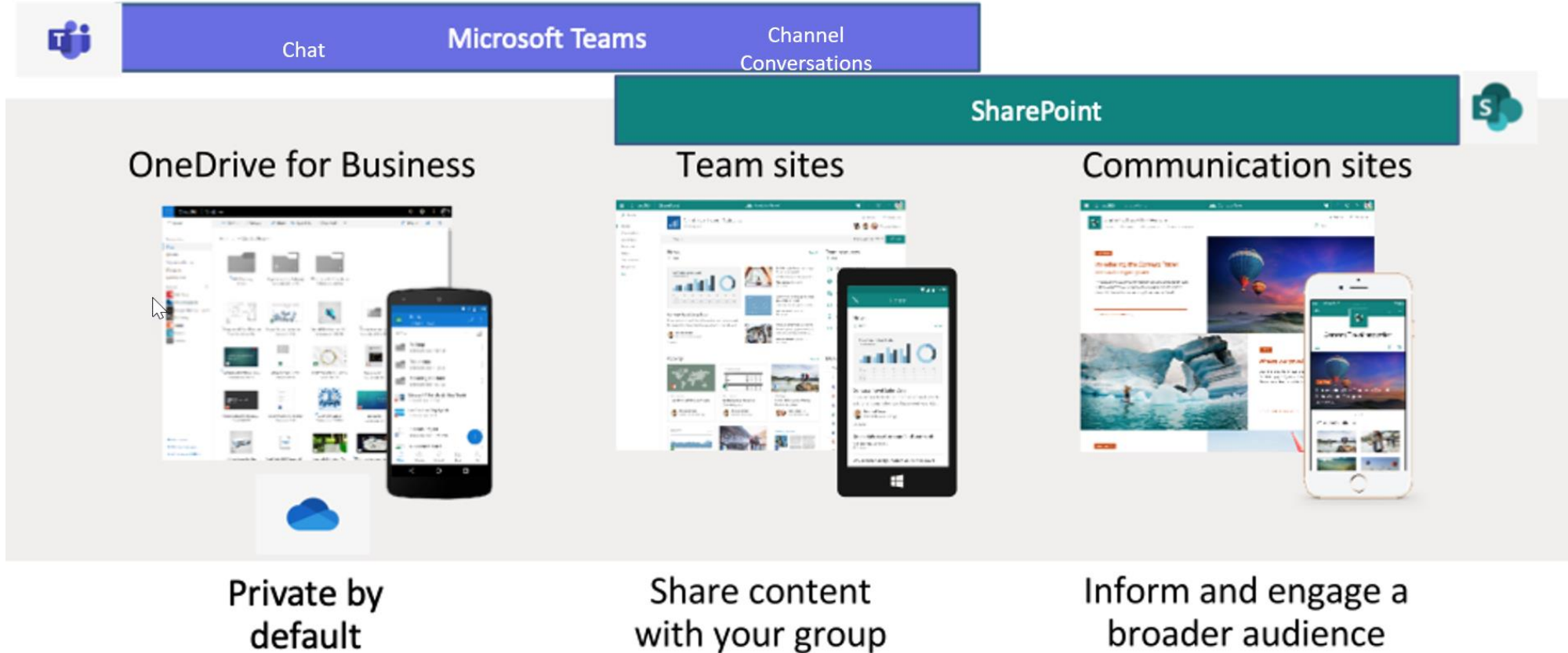
Teams is the launchpad for all O365 applications

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

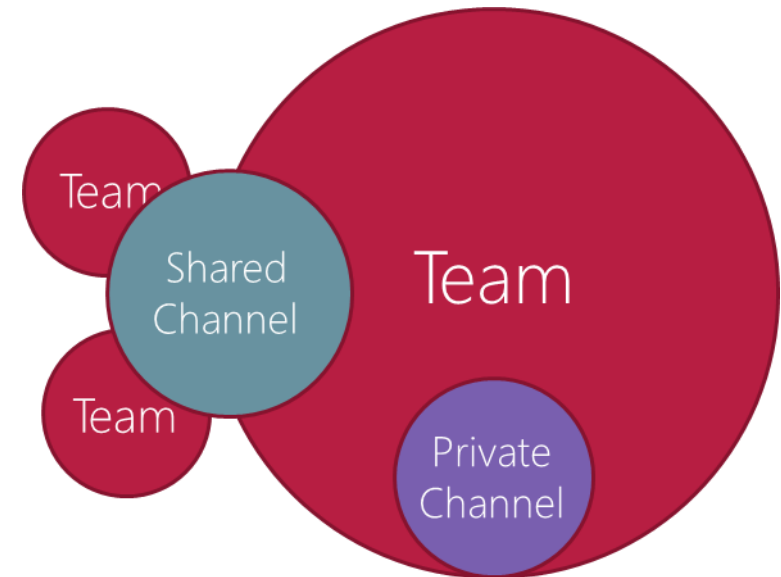


Types of Teams Channels

	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

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
 - Can also include other Teams
- Department team that is private to that department
 - All company channel for two way communication with the organization
- Outbound connections don't have to be setup for internal
 - Just add members of the tenant



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

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

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

Teams First Information Architecture

- 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
- Building the IA to support Teams
- Migrate from file shares, SharePoint Online, etc. into this IA

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	

Documents and Records Management



Records Management

- Records inventory and assessment
- Applying retention and audit paths
- Document ownership, chain of custody and audit
- Defined records policy and procedures
- Preserving records throughout their life cycle

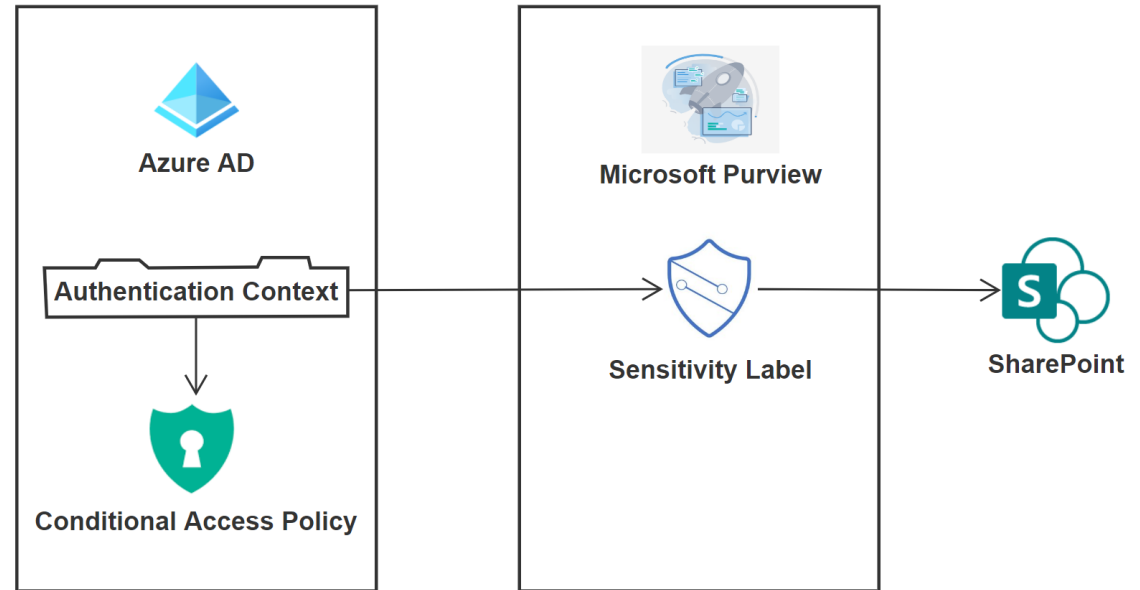


Document Management

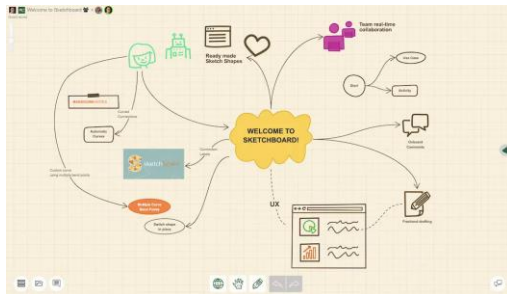
- Process and organizational improvement
- Faster, contextual search
- Data-tagging and folder management

Sensitivity Labels

- Labels can be applied to content in Microsoft 365
 - Emails
 - Conversations
 - 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
- Requires Office 365 E5 Compliance



Tools for Planning your IA

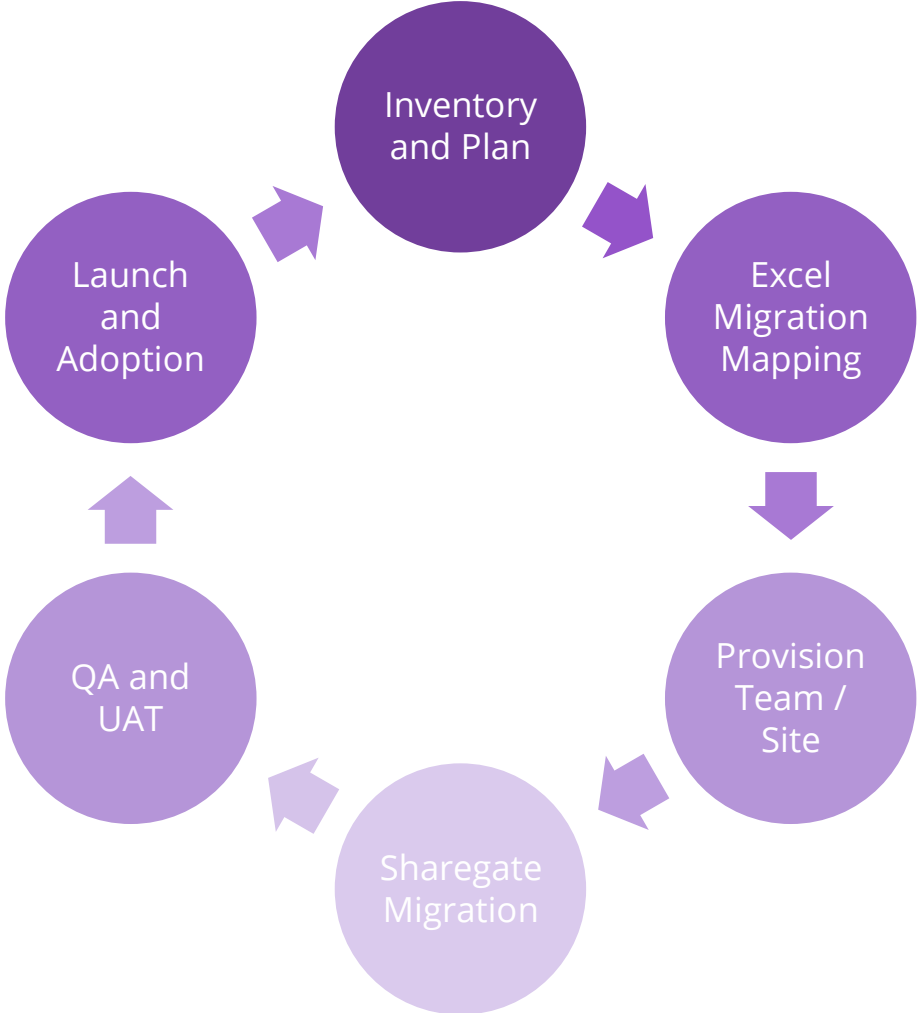


[Sketchboard](#)



[MindManager](#)

Teams First SharePoint Migration



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



Orchestry



Rencore



ProvisionPoint

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

The image 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.
- Alias ***: An empty text input field.
- Public Group**: A toggle switch that is turned on (Yes).
- Create Team**: A toggle switch that is turned on (Yes).
- Submit**: A blue button.
- Cancel**: A grey button.

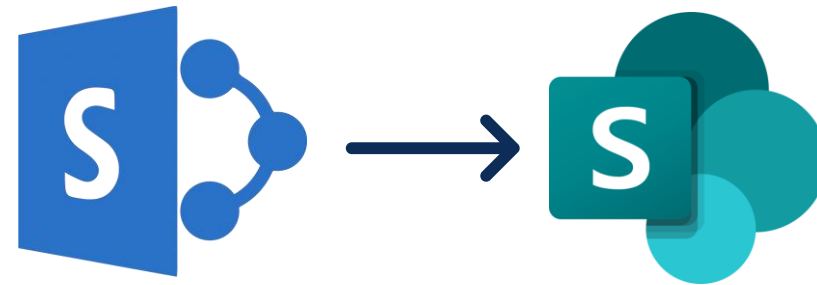
Document Migration

- 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

Migration Tools

ShareGate:
Desktop

[ShareGate Desktop](#)



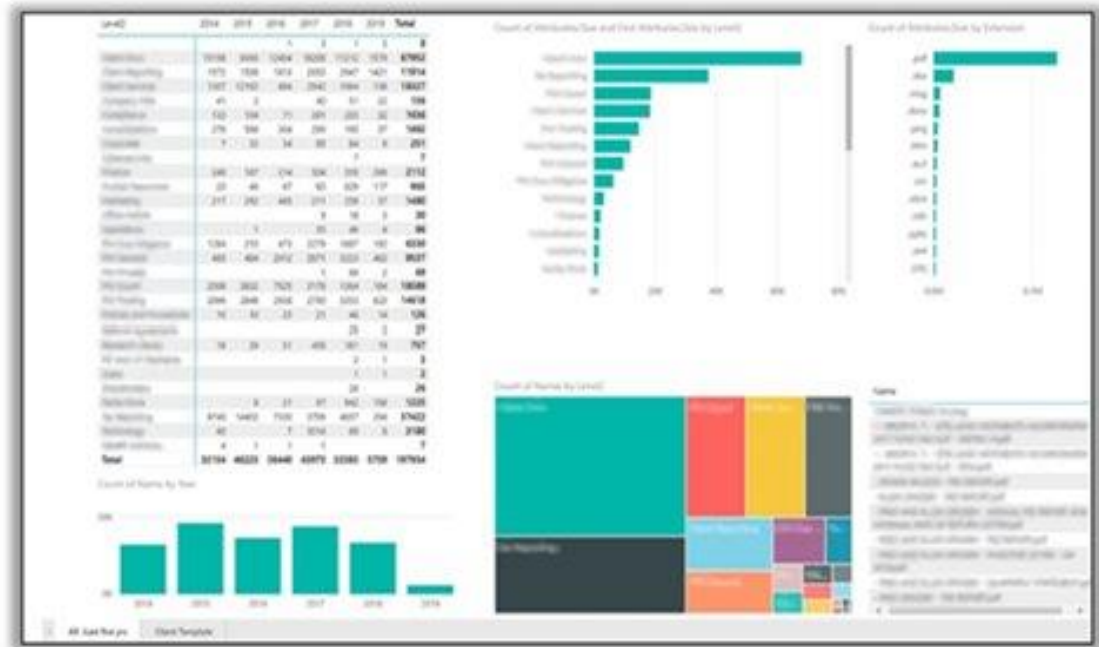
**SharePoint Online
Migration Tool**

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

File Share and SharePoint Inventory

- Inventory scripts to determine how many files you have to migrate
- 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



Useful Links

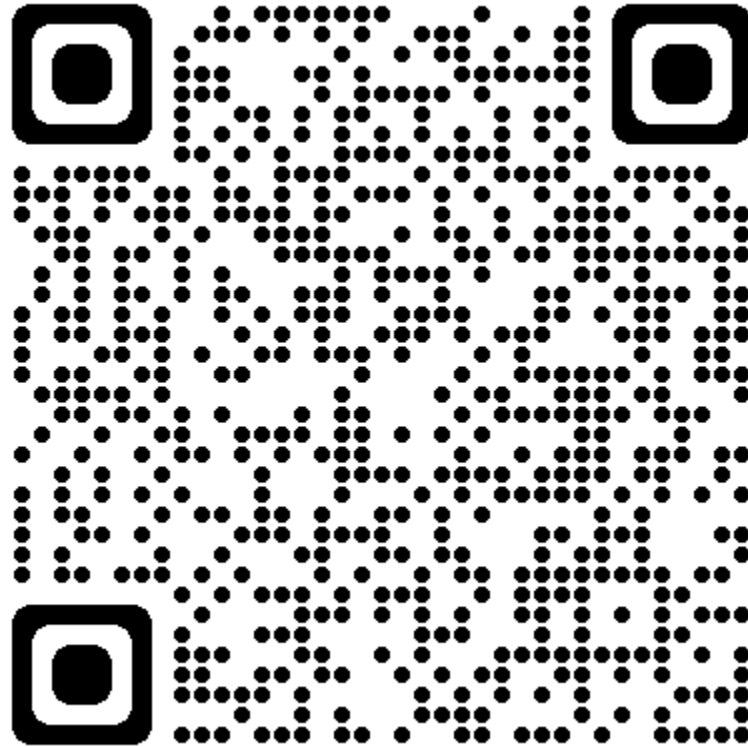
- [Open Source Approach to Teams Provisioning](#)
- [Power BI Azure AD Users and Groups Dashboard | Extranet User Manager](#)
- [Azure AD and Microsoft 365 Security Fundamentals](#)
- [EUM Demo](#)

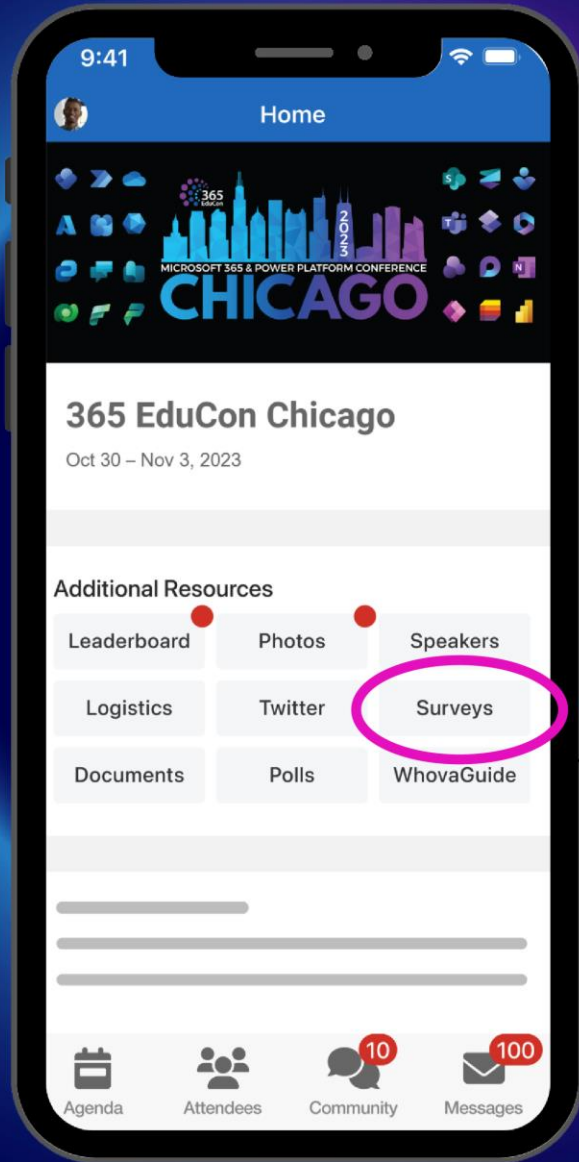
Thank you!

Questions?



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