



Empower Hour: Teams Templates & Top Tips

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Unleash the Power of You

Agenda

Why Teams Templates

Using Microsoft Teams Client

Programmatic Creation

Advanced Solutions



Microsoft Teams

The hub for teamwork in Microsoft 365



Persistent 1:1 & Group Chat



Enhanced Collaboration



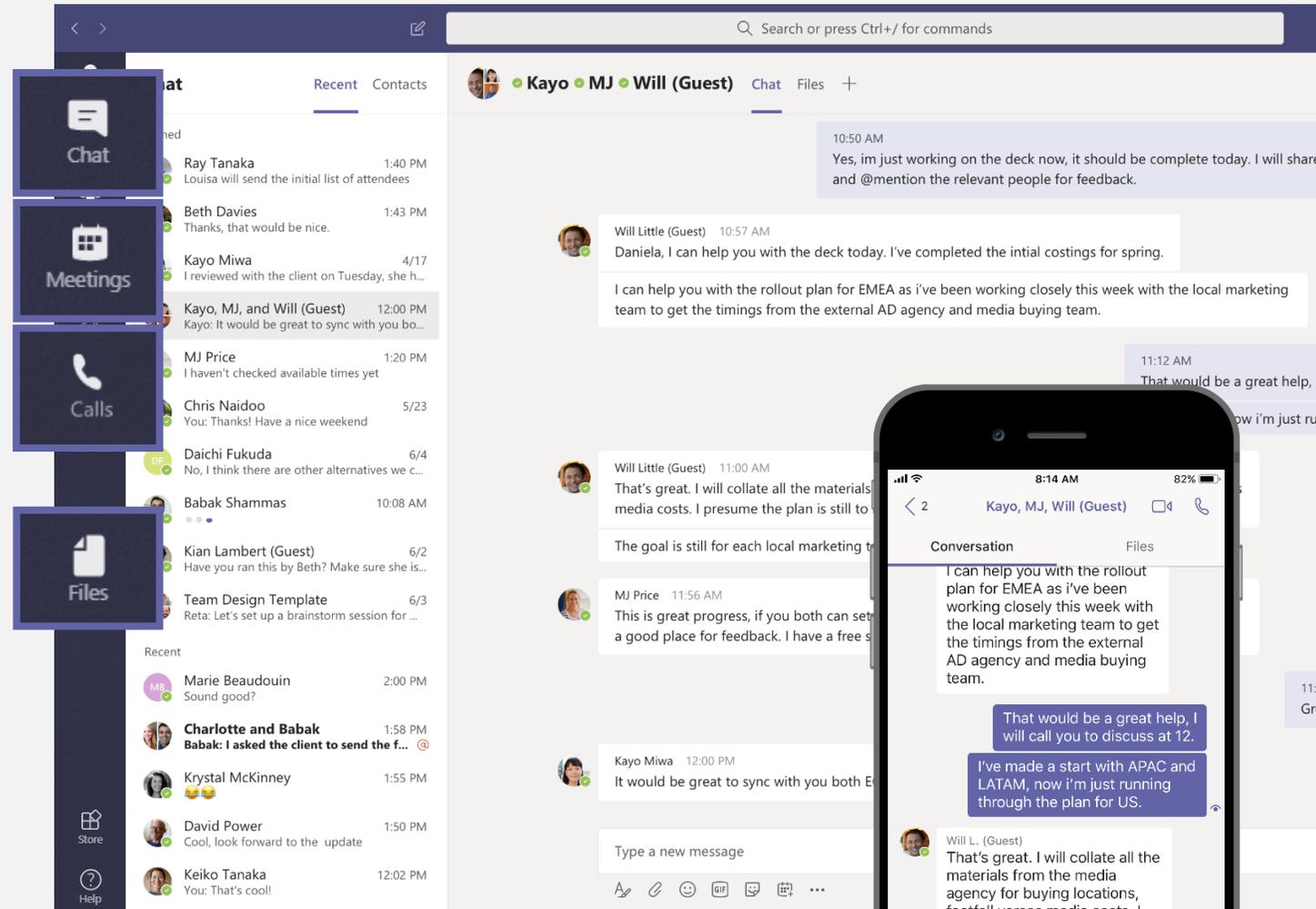
Enterprise Communications



Customize & Extend

Built with the enterprise-grade security and compliance our customers rely on

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Why Teams Templates

template

['templət] 

NOUN

1. a shaped piece of metal, wood, card, plastic, or other material used as a pattern for processes such as painting, cutting out, shaping, or drilling.

synonyms: [cast](#) · [die](#) · [form](#) · [matrix](#) · [shape](#) · [container](#) · [framework](#) · [pattern](#) · [frame](#)

- something that serves as a model for others to copy.

"the plant was to serve as the template for change throughout the company"

synonyms: [model](#) · [pattern](#) · [blueprint](#) · [archetype](#) · [prototype](#) · [sample](#) · [example](#) · [\[more\]](#)

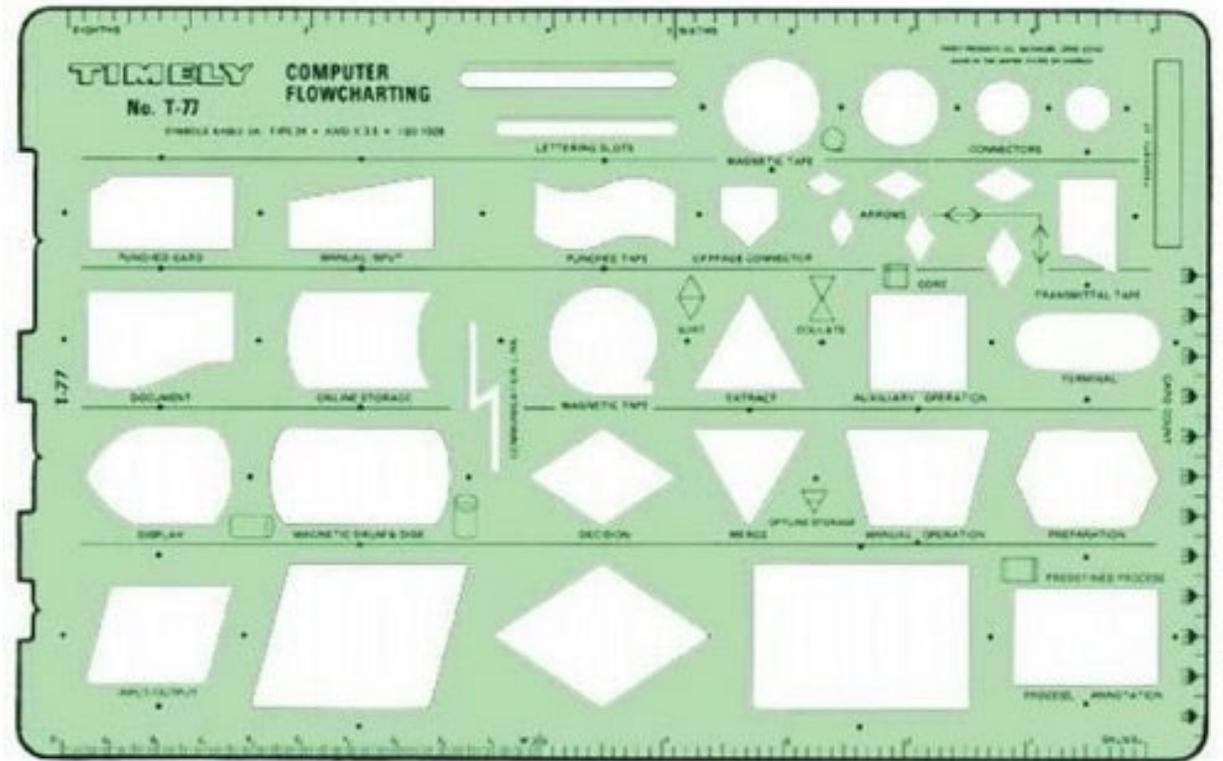
- *computing*

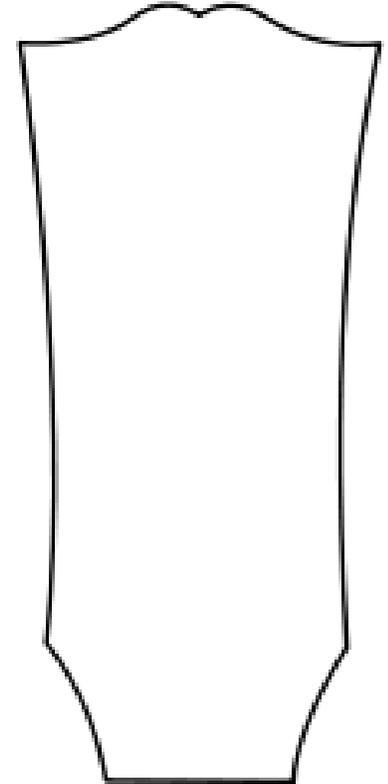
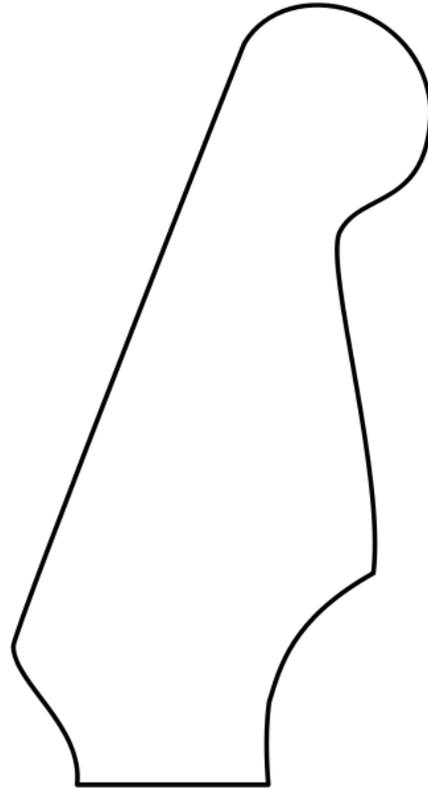
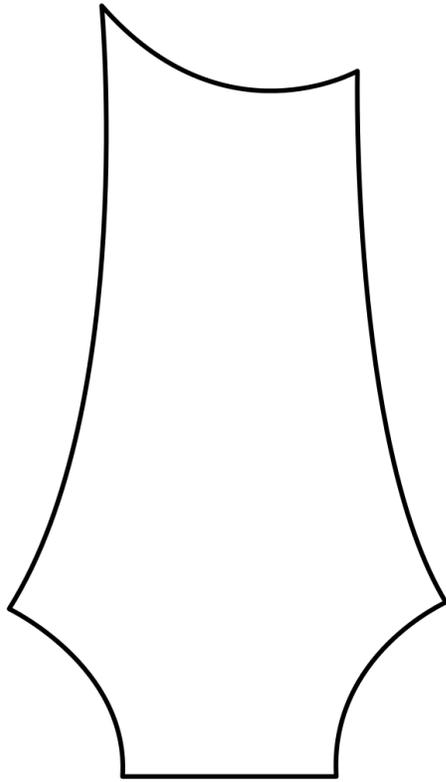
a preset format for a document or file, used so that the format does not have to be recreated each time it is used.

"a memo template"

2. a timber or plate used to distribute the weight in a wall or under a support.

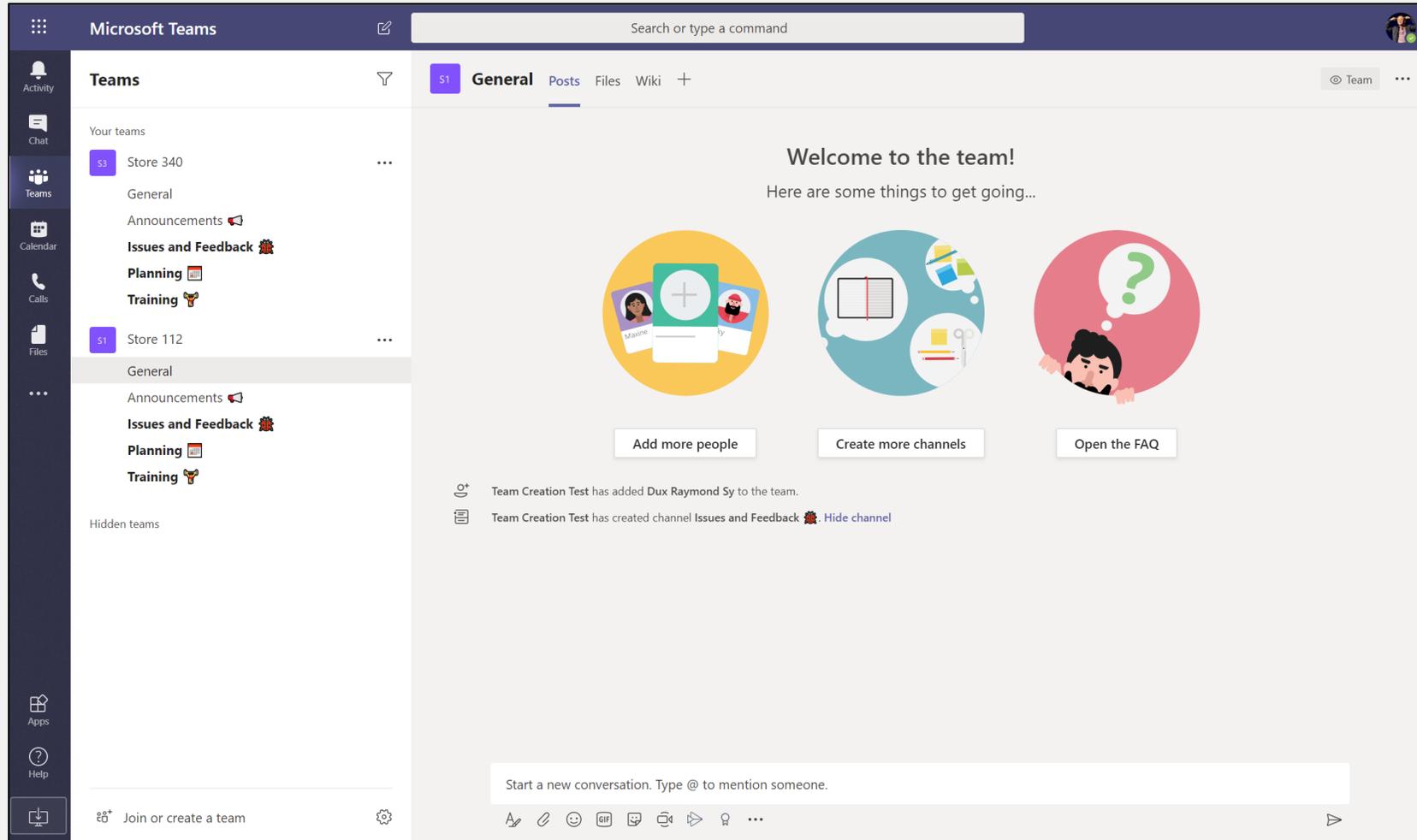
Mike's first
template





Templates

Microsoft Teams Templates



Leverage Microsoft Teams Client



Create a Team

Create your team



Build a team from scratch



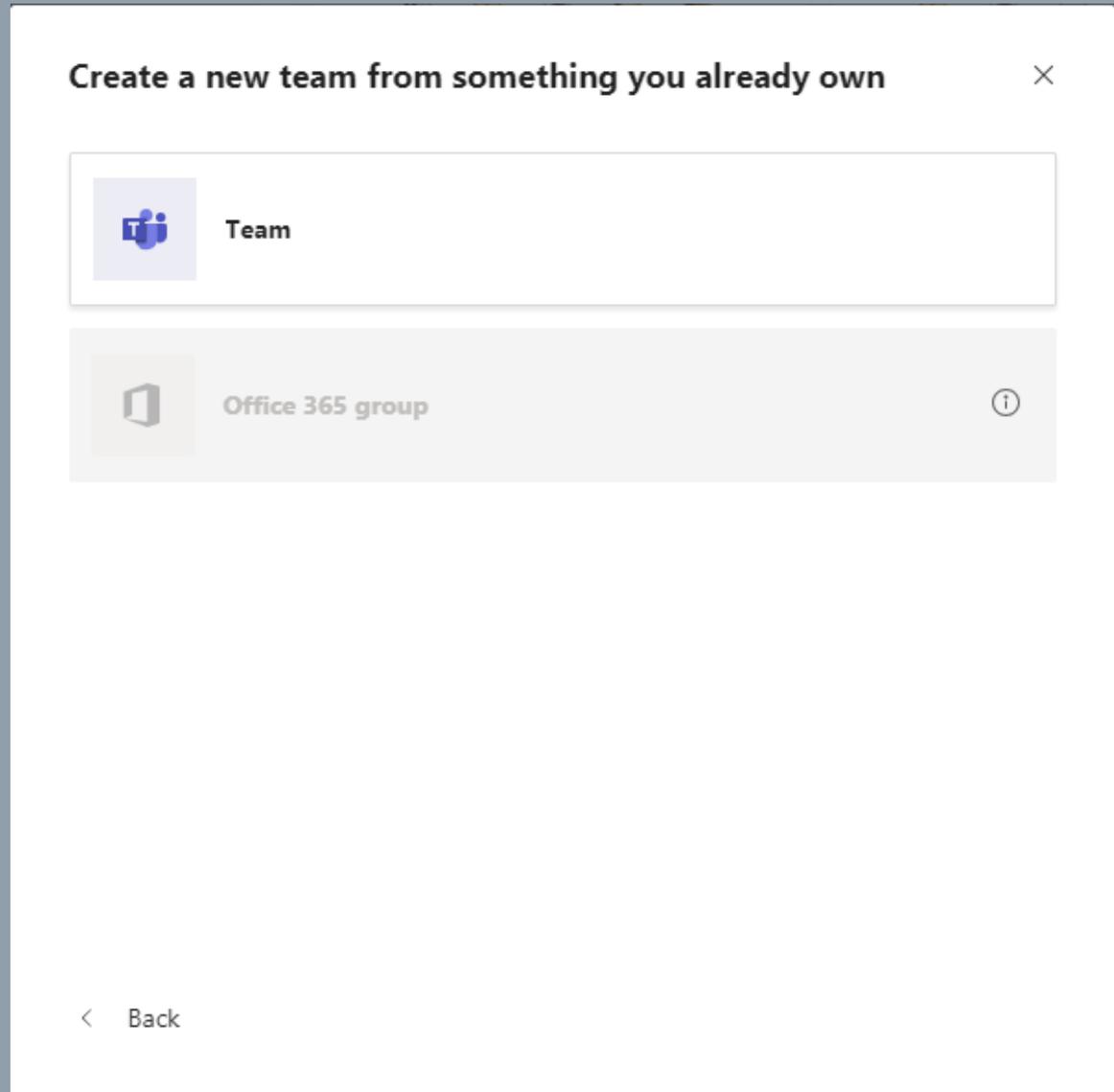
Create from...

An existing Office 365 group or team

[What's a team?](#)

[See your organization's guidelines](#)

Create from an existing Office 365 group or team



Let's use existing
Contoso Corp
Comms Team as
a template

You are using "Contoso Corp Comms Team" as a template for a new team ×

Team name

Contoso Corp Comms Team [copy] ✓

Description

My new Corp Comms Teams

Privacy

Private - Only team owners can add members ▾

This team is classified for General information. [Change setting](#) ⓘ

Choose what you'd like to include from the original team

Messages, files and content won't be copied. You'll need to set up tabs and connectors again.

[← Back](#)

[Create](#)

Add members

Add members to Contoso Corp Comms Team [copy]

Start typing a name, distribution list, or security group to add to your team. You can also add people outside your organization as guests by typing their email addresses.

Channels are
pre-defined

CC

Contoso Corp Comms Team [copy]

...

General

Annual Report

Breakout Group 1

Breakout Group 2

Corporate Sustainability

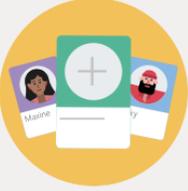
Mergers and Acquisition

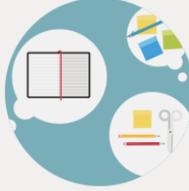
Tabs are predefined

The screenshot shows a Microsoft Teams channel interface. At the top, there is a navigation bar with tabs: 'General' (selected), 'Posts', 'Files', 'Corporate Comms', 'Wiki', 'Corporate Comms v.N...', and 'Video'. Below the navigation bar, a 'Welcome to the team!' message is displayed, followed by the text 'Here are some things to get going...'. Three circular icons are shown: 'Add more people' (with a plus sign and profile pictures), 'Create more channels' (with a book and document icons), and 'Open the FAQ' (with a question mark and a person icon). Below these icons, a list of recently created channels is shown, each with a 'Hide channel' link.

CC **General** Posts Files Corporate Comms Wiki Corporate Comms v.N... Video +

Welcome to the team!
Here are some things to get going...

 **Add more people**

 **Create more channels**

 **Open the FAQ**

-  Michael Feuda has created channel Mergers and Acquisition. [Hide channel](#)
-  Michael Feuda has created channel Corporate Sustainability. [Hide channel](#)
-  Michael Feuda has created channel Annual Report. [Hide channel](#)
-  Michael Feuda has created channel Breakout Group 1. [Hide channel](#)
-  Michael Feuda has created channel Breakout Group 2. [Hide channel](#)

Conversations
start fresh

CC **Annual Report** Posts Files Execution Plan for Ann... Wiki +



Let's get the conversation started

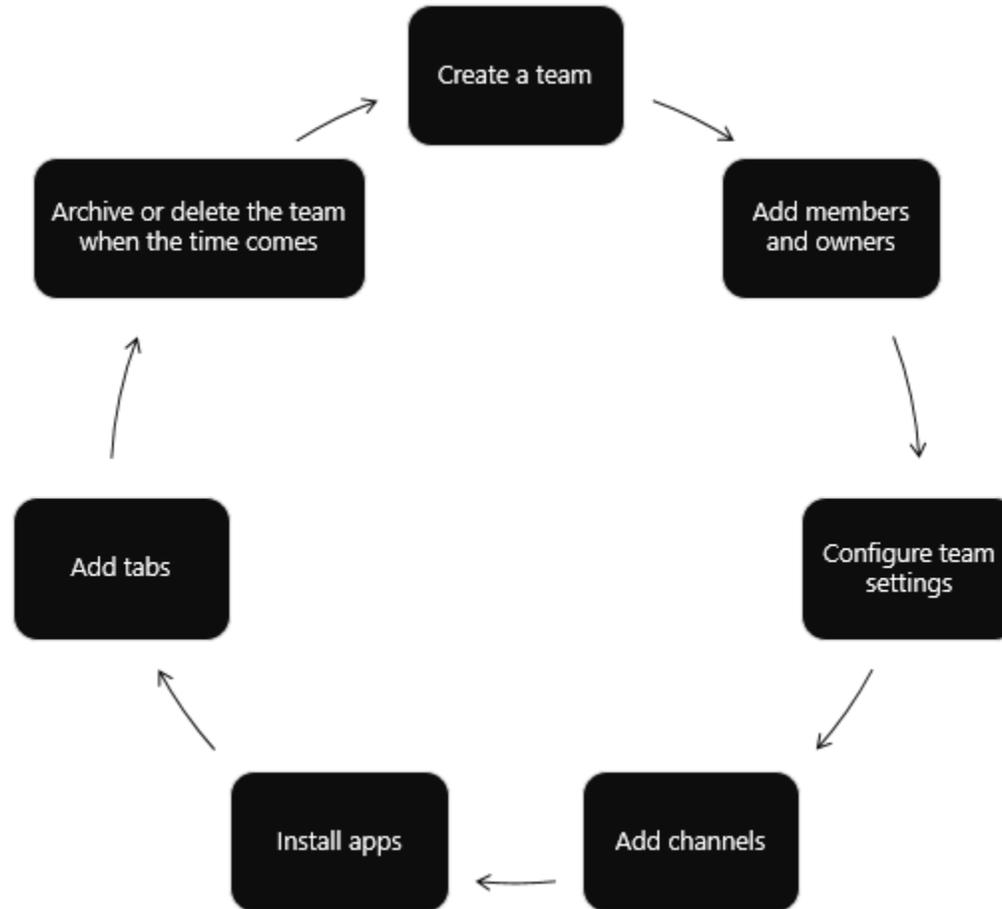
Try @mentioning people you want to collaborate with, or add some tabs to customize your space.

Planner OneNote Website Add tab

Programmatic Creation



Microsoft Graph API Extends Teams



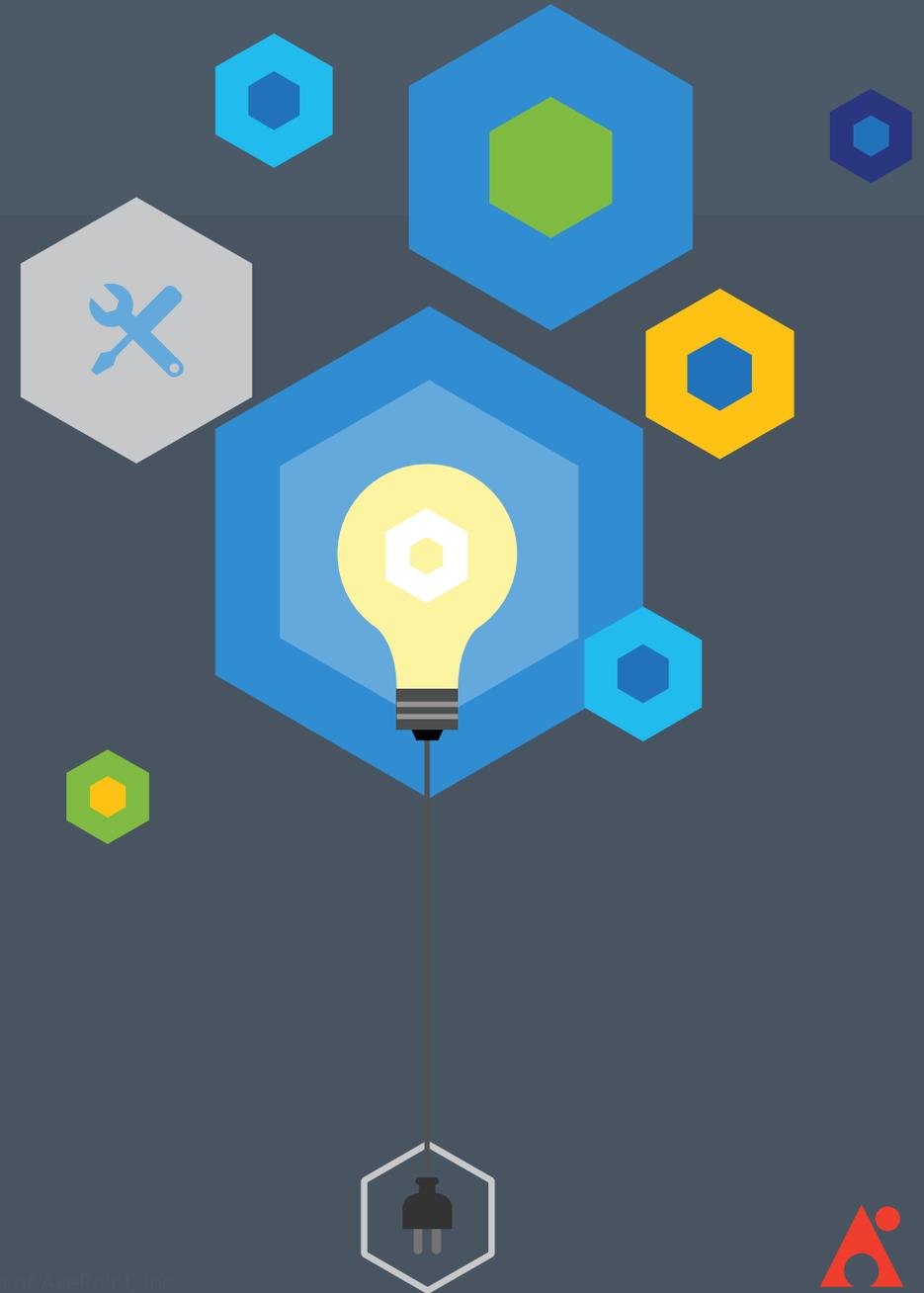
Example Scenario

Our non-profit org would like to organize volunteer groups in MD, VA, NJ, PA and DC to deliver supplies to elderly during this crisis.

We would like to “mass” create 5 teams from a template.



DEMO



File Home Insert Formulas Data Review View Help Tell me what you want to do Open in Desktop App Share Comments

Undo Clipboard Font Alignment Number Tables Cells Editing Ideas

Calibri 11 General

B I U D ab \$ % , .00 .00 Conditional Formatting Format as Table Insert Delete Format AutoSum Clear Sort & Filter Find & Select Ideas

A8

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	States	Owner																	
2	MD	admin																	
3	VA	admin																	
4	DC	admin																	
5	PA	admin																	
6	NJ	admin																	
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Advanced Solutions

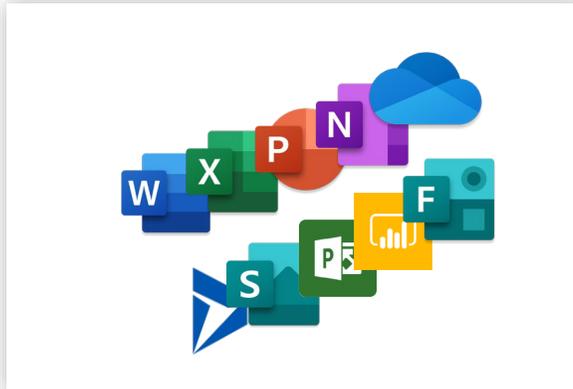
Office 365 Groups Powers Microsoft 365 Collaboration

Membership service for Microsoft 365 teamwork apps

22+ Apps



Advanced sharing



Partner ecosystem



Office 365 Groups

Centrally managed, secured, and governed



Azure Active Directory

Example: When Creating a Team ...



Establish Governance Foundation



For collaborative workspaces, you need to govern:

How are Teams requested, approved and created

Provisioning

How do I ensure that policies are enforced?

Management

How do I retain/expire/dispose of Teams as appropriate

Lifecycle



Make It Easy for People to Do the Right Thing

EXAMPLE

DEPARTMENT



DEPARTMENT



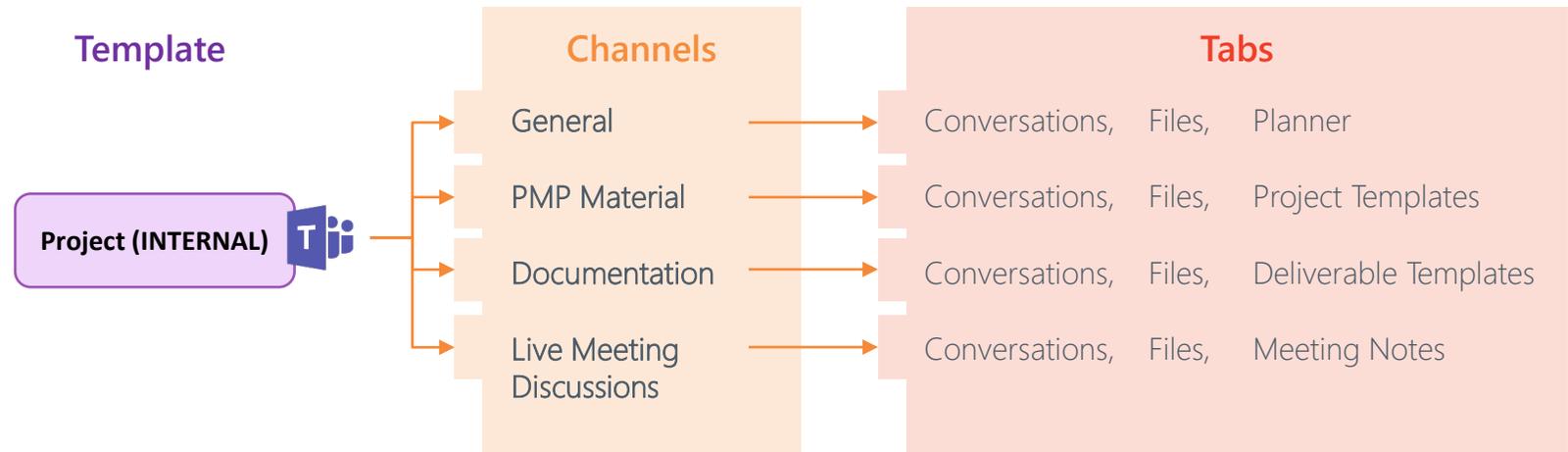
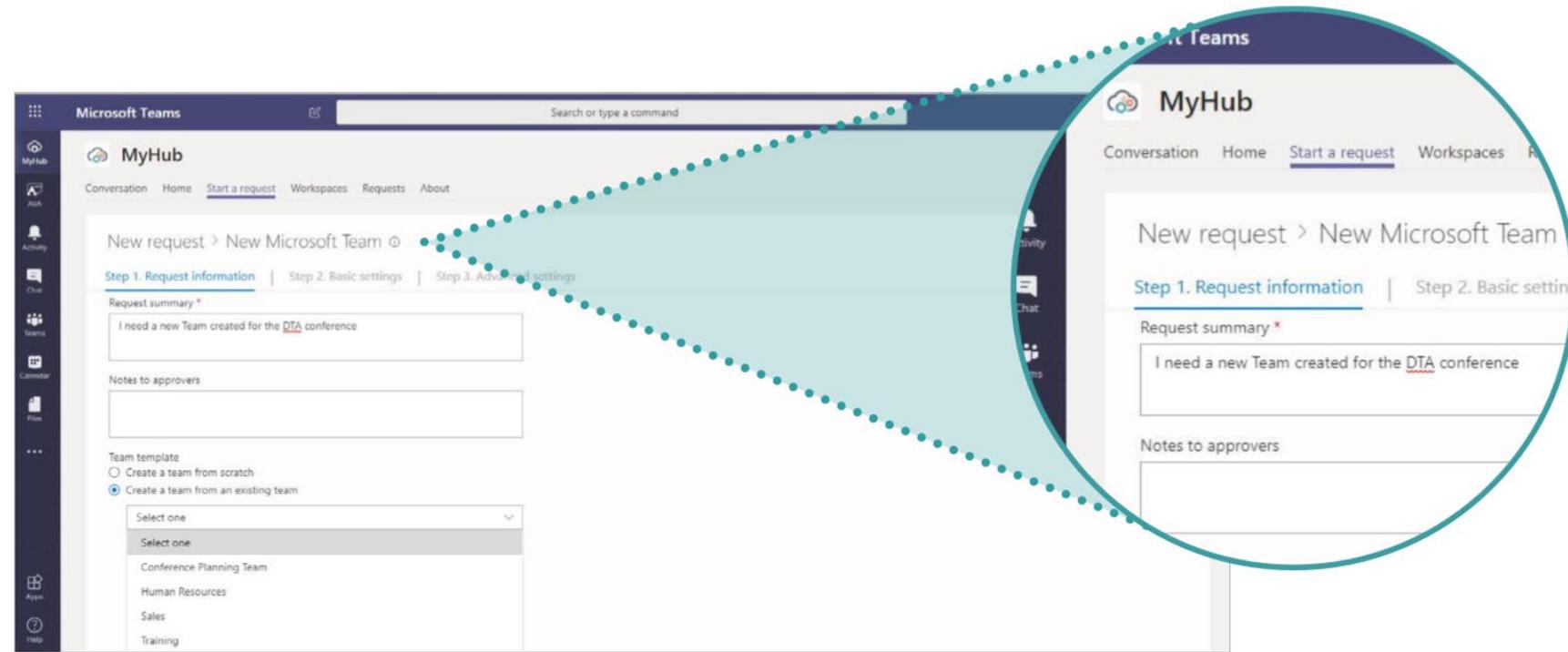
DEPARTMENT



EXTERNAL SHARING	No external sharing 	External sharing allowed in: 	External sharing only allowed in: 
EXPIRATION/RETENTION	6 Months after last accessed	12 Months after last accessed	9 Months after last accessed
ALLOW THESE USERS TO CREATE A TEAM	All requests through Central IT	All requests through Department IT	Only Joe, Sally, and Harold can create
RECERTIFY MEMBERS	after 3 Months	after 6 Months	after 12 Months

Make it easy to choose the right template

- Users can make self-service requests from available workspace templates that are relevant to them
- Workspaces can come pre-configured with channels, tabs, and bots



“Templates” are more than just channels and configuration.

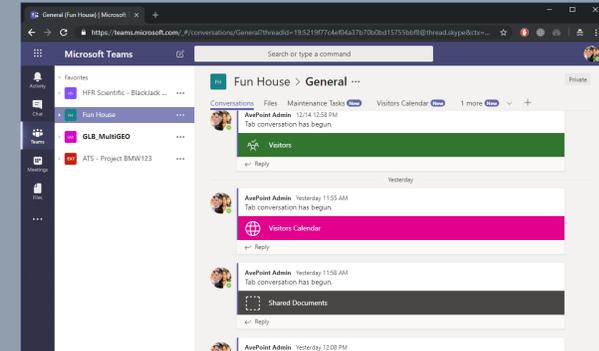
A template framework that includes the site components, and the lifecycle components.

- Pre-set Channels and Tab recommendations are great for helping contextualize Teams for business users, but these only get you so far as a “template”.
- The AvePoint approach accounts for the Operational Governance and lifecycle to ensure “templates” are not ONLY provisioned correctly (and compliant with IT policy) but also managed

Project (INTERNAL)



TEMPLATE DEFINITION: Recommended for internal-department or ad-hoc Projects with a small-to-medium audience who require pre-configured default Project channels with real-time chat and meetings.



EXTERNAL SHARING



No external sharing

EXPIRATION/RETENTION

6 Months
after last accessed

WHO CAN CREATE

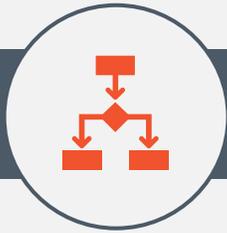
All requests through Central IT

RECERTIFY MEMBERS

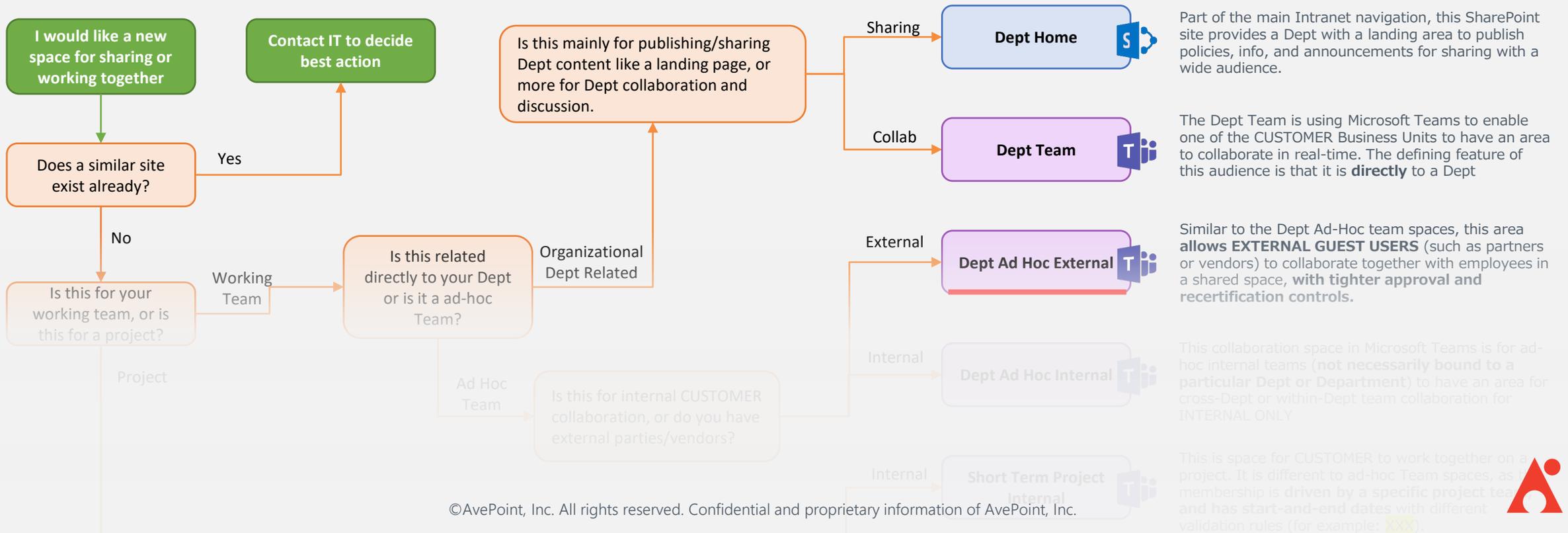
after
3 Months



Decision Trees Map the Business to the Templates



Helps with adoption making it easy for users, and helps clarify IT Governance



Example: Request and Track Workspaces

Microsoft Teams

MyHub

Conversation Home Start a request Workspaces Requests About

New request > New Microsoft Team

Step 1. Request information | Step 2. Basic settings | Step 3. Advanced settings

Request summary *

I need a new Team created for the DTA conference

Notes to approvers

Team template

Create a team from scratch

Create a team from an existing team

Select one

Select one

Conference Planning Team

Human Resources

Sales

Training

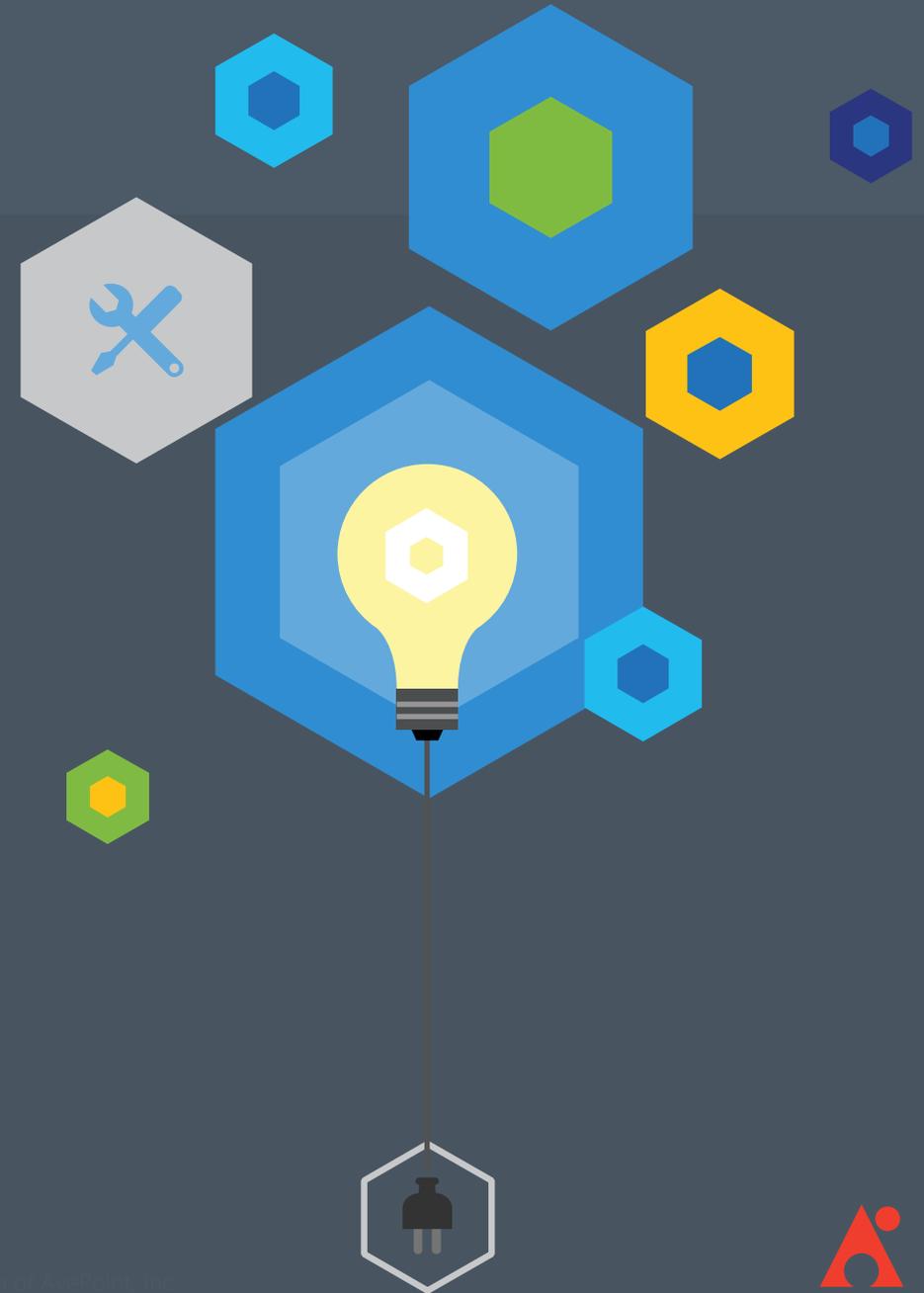
Members

Team settings

- Harness the power of Microsoft Teams templates to empower employees & improve employee engagement.
- Quickly spin up a new team with the appropriate pre-set channels, bots and integrated apps.
- Maintain operational oversight in Office 365 while still allowing your employees the freedom to collaborate securely.



DEMO



Example: Defining Template

AvePoint Cloud Governance

Service Management > Copy of Create Privat... ⓘ

Copy Save Save and Activate Cancel

Group of Teams

Choose if an Office 365 Group or a Microsoft Team will be created via this service.

Office 365 Group

Microsoft Team

Team Template

Choose to allow business users to create Microsoft Teams from scratch or create teams from team templates. Business Enablement Templates can be the teams you add to the template scope or existing teams that the requesters belong to. Note that if a business user creates a team from a team template and chooses to copy team settings, team privacy, and team classification from the template, your configurations for these will be overwritten.

Allow business users to create a team from scratch

Allow business users to create a team from an existing team

Allow business users to select from their own teams

Allow business users to select from the team template scope

+ Add Team < 1/2 >

Team	Privacy	Action
Employee Onboar...	Private	✗
Clinical Trial	Private	✗
Software Develop...	Public	✗
Retail Store Constr...	Public	✗
Quarterly Confere...	Public	✗





Team Space

- Distinct group of users, collaborating and storing common info
- Generally part of organizational teams

Backup: All
External Users: No
Recert: Annual
Reporting: Ad-hoc
 +
Default Labels
Metadata Presets



Project Space

- Dynamic Group
- Spanning different org hierarchies
- Exist only during life of project
- Typically follows a structure

Backup: All
External Users: No
Recert: Annual
Reporting: Ad-hoc
 +
Default Labels
Metadata Presets



Extranet Space

- Securely share and collaborate with external parties
- Audited and controlled

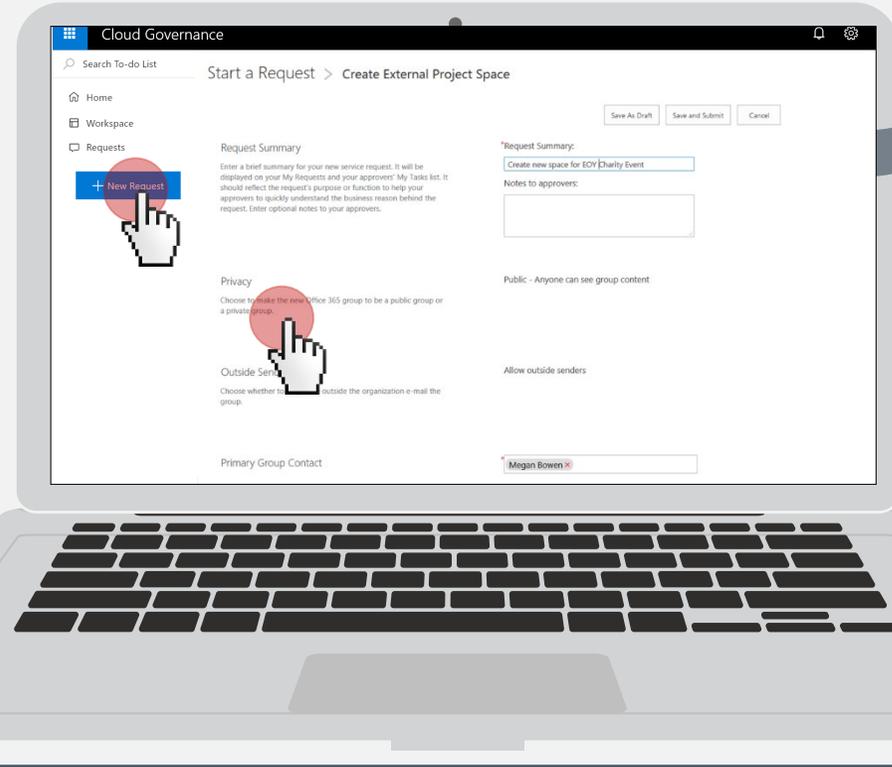
Backup: All
External Users: Yes
Recert: 6 Months
Reporting: Annual
 +
Default Labels
Metadata Presets



EOY Charity Event

- External Sharing: On
- Recertification / Reporting: On
- URL: /sites/PROJ_EOYCharityEvent

LABELLED
TAGGED



Bringing It Together

AvePoint Cloud Governance for Office 365

ROI Calculator

Free Trial

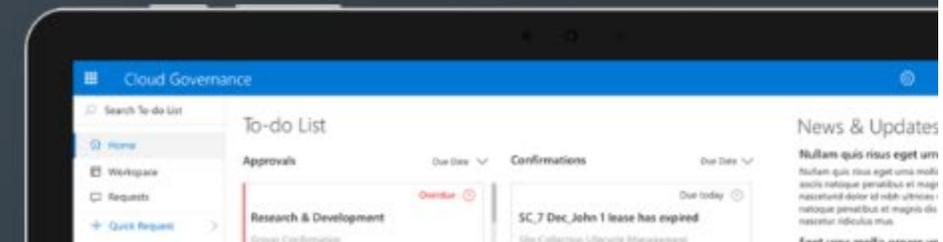


LIVE
CHAT

Scale, Automate, & Secure

Accelerate Office 365 adoption with automated service delivery

Give your users the Teams, Sites and Groups they need, when they need them, all backed by a sustainable, efficient and secure governance framework.



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



Financial Industry Solutions

A Teams industry solution developed by AvePoint for Prudential.

Problem: IT compliance and management burden related to broad employee Teams creation and oversight across 60k employees.

Solution: Backend Teams process to provide enhanced control over Microsoft Teams creation, site sprawl and compliance management at an employee level across a Fortune 500 Enterprise.

Impact: Mitigation of IT burden with quick reports on Group ownership and permission driving employee and IT Productivity. Increased speed of rollout and adoption of Microsoft Teams through solving governance concerns.

“We knew we needed help with multiple things – reporting, governance, management, etc. – and AvePoint was the only provider to really cover it all.” Robert Young, IT Engineer Prudential



The Bottom Line
Manual Site & Team Provisioning requests decreased from 35 to 3!

What We Covered

Why Teams Templates

Using Microsoft Teams Client

Programmatic Creation

Advanced Solutions



How We Can Help You

Teams Governance Workshop

Define and Clarify Governance in the context of Teams, help identify goals of Teams in the organization. With this tailored and interactive workshop, understand Teams best-practices and get started on the right path with a pointed recommendations summary.

- Workshop Materials
- Meeting Notes

Teams Governance Assessment

In addition to Teams Governance Workshops, AvePoint will help provide a Starter Teams Governance Policy outline, along with a Best Practices Assessment and a mapping exercise of 3x Business Units to Governance policies for Teams use cases.

- Completed Workshops
- Summary Meeting Notes
- Executive Summary (PPT)
- Best Practices Assessment (DOC)
- Starter Governance Policy Outline

Teams Governance Pilot

Provide a detailed analysis of the current state and the tools and techniques to implement IT governance. Map key business units to our analysis of IA, O365 tools, and governance recommendations. Execute a Governance Pilot/POC using O365 and AOS.

- Completed Workshops
- Summary Meeting Notes
- Executive Summary (PPT)
- Strategic Roadmap (DOC)
 - Breakdown of O365 Tools
 - Info Architecture Analysis
 - User Adoption Methodology
 - Governance Policy Outline
 - Roadmap and Recommendations
- Governance POC (O365 and AOS)



Let's Connect

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Dux Raymond Sy

<http://linkedin.com/in/meetdux>

thank you

Gracias

ευχαριστώ

Danke

Grazie

благодаря

Hvala

Obrigado

Kiitos

شكراً

Tak

Ahsante

Teşekkürler

متشكراً

Salamat Po

감사합니다

Cám ơn

شكريه

Terima Kasih

Dank u Wel

Děkuji

நன்றி

Köszönöm

ありがとう
ございます

ឧបត្ថម្ភគ្រប់

Dziękuję

谢谢

Tack

Mulțumesc

спасибо

Merci

תודה

多謝晒

дядкую

Ďakujem