AvePoint®

Tailoring Microsoft Teams For Maximum Productivity

Create Teams templates and customize rules for different departments across your organization

Unleash the Power of You

https://www.avepoint.com/events/webinar/tailor-teams-productivity

Accessible content is available upon request.

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Where we're going…

- Teams as the "hub" for teamwork
- Tailoring: Making the team "fit"… for purpose"
- "Template" options for Microsoft Teams and beyond
- How do I get started?
- What users see is just the beginning…

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Microsoft Teams – The Hub for Teamwork

Communicate: Chat, calls & meetings for today's teams

Collaborate: Deeply integrated Office 365 apps

Customize & Extend: 3rd party apps & existing systems

Work w/ Confidence: Enterprise security, compliance & manageability

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“Team | Work”

Share Files

Plan meetings and events

Send and receive emails

Track tasks

Social engagement

Chats and conversations

Look familiar?

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The basic "shape" of a Team…

CHANNEL = Focus area & "attention" boundary

TEAM = Security boundary, O365 Group membership

TABS= Resources to support the Channel

Channel: General
- (TAB) Conversations
- (TAB) Files
- (Tab) Conference task Planner

Channel: After Hours
- (TAB) Conversations
- (TAB) Files
- (TAB) OpenTable Site

Conference Team

Channel: Logistics
- (TAB) Conversations
- (TAB) Files
- (TAB) Logistics doc
- (TAB) Rooming worksheet

Channel: Marketing Communication
- (TAB) Conversations
- (TAB) Files
- (TAB) Photos DocLib
- (TAB) Hootsuite site
- (TAB) LinkedIn

Channel: Meeting Management
- (TAB) Conversations
- (TAB) Files
- (TAB) Meeting OneNote
- (TAB) Meeting worksheet

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The “hub” … in action!

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Tabs: Docs and applications in your Team channels…

*Note: GCC environments and private channels may have reduced Tab selection

Even citizen developers can get in on the App act…

A simple Power App exposed through a Teams Tab

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Taking this to the next level…

https://docs.microsoft.com/en-us/MicrosoftTeams/teams-adoption-define-usage-scenarios

Best-practice, business-specific "templates" for Teams…

Microsoft Teams use cases for every scenario

Customer Support
- Enable continuous knowledge sharing between shifts
- Provide visibility into customer escalations
- Search for solutions across conversations
- Speed up issue resolution with various subject matter experts

Engineering
- Enable continuous discussion across a distributed team
- Discuss ideas and requirements, gather inputs in the open
- Store standard documentation and files
- Integrate with developer tools like Jira

Finance
- Prepare earnings release with cross-functional stakeholders
- Streamline data consolidation and analysis
- Store budgeting documentation and files
- Share economic trends and news

Human Resources
- Drive alignment on job descriptions and streamline interview processes
- Plan and prepare new employee onboarding
- Engage distributed employees in training
- Share department resources and documentation

Marketing
- Coordinate campaigns and event tasks
- Share the latest content drafts for feedback
- Get automated reports from analytics tools
- Prepare marketing launch across multiple stakeholders

Sales
- Get quick answers from PMs and Sales Ops
- Share key customer wins
- Get lead notifications and deal mentions
- Share latest company, product and competitor news

Operations & Project Management
- Streamline project communication and tools
- Provide status updates, get feedback, coordinate tasks
- Share files and collaborate on deliverables
- Get new project members up to speed quickly

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"Template" example-- Education

Microsoft Teams

Search or type a command

Teams

Join or create team

The TEAM

The Team's CHANNELS

All teams

Algebra

General

Extra credit corner

Homework help

Subjects

Units

General Posts Files Class Notebook Assignments Grades +

Channel TABS

Team

Cara Coleman 4/6 3:08 PM

Can anyone tell me what a variable is? Please give an example in the form of a simple word problem.

5 replies from Alex, Cara, Fatima, and Marsha

Reply

Marsha Davenport 4/6 3:08 PM

2

Hey @Algebra, I've been using this site for awhile now and it's really useful for learning new concepts.

https://www.wolframalpha.com/examples/mathematics/algebra/

Wolfram|Alpha Examples: Algebra

Interactive algebra calculators for solving equations, polynomials, rational functions, simplification, vectors, matrices, linear algebra, quaternions, finite groups, finite fields, domain & range.

www.wolframalpha.com

3 replies from Rosie, Samuel, and Cara

Reply

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How does this actually work? (today)

Methods available to create repeatable, pre-configured Teams

Teams Templates

- Provision the team programmatically using one of the available "Base Templates" MSFT provides *(limited options, can't create your own)*
- Programmatically add and configure Channels, Apps and Tabs
- *Requires scripting/coding expertise*
- *Any changes to templates require skilled coding/scripting*

https://docs.microsoft.com/en-us/microsoftteams/get-started-with-teams-templates

"Cloning" a Team

- Create a Team based off an existing team, copying Channels, Tabs, Settings, Apps, etc
- Can be done by an end user or programmatically
- *"Configuring" Tabs requires additional scripting/coding expertise*
- *Easy to change your reference Teams to make changes to the template*

https://docs.microsoft.com/en-us/graph/api/team-clone?view=graph-rest-1.0&tabs=http

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Microsoft Teams

Search or type a command

Activity

Chat

Teams

MyHub

Calendar

Files

Apps

Help

MyHub Chat Home Start a request Workspaces Requests About

New request > Create Private Team

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

Request summary *

Need a workspace for the new clinical trial

Notes to approvers

Please approve ASAP!

Team template

- ○ Create a team from scratch
- ◉ Create a team from an existing team

Select one

Select one

Board Meeting

Clinical Trial

Clinical Trial

Employee Onboarding

Performance Review

Quarterly Conference

Retail Store Construction

AvePoint Cloud Governance

Service Management > Copy of Create Privat...

Copy Save Save and Activate Cancel

Team Template

Choose to allow business users to create Microsoft Teams from scratch or create teams from team templates. Business Enablement Templatess 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 from the template, your configurations for team settings will be overwritten.

- [x] Allow business users to create a team from scratch
- [x] Allow business user to create a team from template
- [ ] Allow business users to select from their own teams
- [x] Allow business users to select from the team template scope

Add Team 1/2

Team	Privacy	Action
Employee Onboar...		✕
Clinical Trial		✕
Software Develop...		✕
Retail Store Constr...		✕
Quarterly Confere...		✕

What about additional customizations?

Service Management > Copy of Create Crisis ...

Copy | Save | Save and Activate | Cancel

Group Team Site Design

Select a site design for Office 365 group team sites created via this service, or allow business users to select this in the request form.

Public Sector customer tracking

Assign by IT Admin

Show as Read-Only to Business User

Hide from Business User

Service Management > Creat

Copy | Save | Save and Activate

Custom Action

Specify the desired custom actions to execute via publishe
Services. Custom actions can be initiated during pending r
validation, before request approval, after request approval,
request execution, and/or upon error task generation.

- Pending validation - After requesters save and submit the
specified custom action will be executed to validate the re
request is valid, a task will be generated and assigned to a
- Before approval - After requesters save and submit the re
specified custom action will be executed. Then, a task will
and assigned to an approver.
- After approval - After requesters save and submit the requ
be generated and assigned to an approver. After the appr
the task, the specified custom action will be executed.
- After execution - After requesters save and submit the req
the settings configured in this service are executed, the specified custom
action will be executed.
- Upon error task generation - After requesters save and submit the
request, the specified custom action will be executed if an error task is

Power Automate | Search for helpful resources

Demo - Creating a new Team and automatically create a new item in SPO list

- Home
- Action items
- My flows
- Create
- Templates
- Connectors
- Data
- AI Builder
- Solutions
- Learn

When a request is completed

MyHub

Search connectors and triggers

Triggers | Actions

- When a request is rejected — MyHub
- When a request is submitted — MyHub
- When an approval task is assigned — MyHub
- When an end user completes a governance details confirmation task — MyHub
- When an error task is generated — MyHub

So, where do I start?

KEY 1: GET INFORMED

Uncover what's possible

https://docs.microsoft.com

What is on the roadmap?

https://www.microsoft.com/en-us/microsoft-365/roadmap

What can be automated / templated?

Know your limitations

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KEY 2: PLANNING – SET UP FOR SUCCESS

Talk to your end users

Find and work with pilot team(s)

Define what collaboration and communication spaces are needed

Find champions or work with existing BU's / champions

Define success

Budget including time, resources, and go-live dates

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IDENTIFY BUSINESS SCENARIOS

Source: Microsoft

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KEY 3: PROTOTYPING

Begin building working solutions manually

Work with champions or pilot team to validate and refine

Incl. Teams teams, SharePoint sites, 1st/3rd party tools, etc.

Always consider what is / is not possible to templatize

Test workflows

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KEY 3: PROTOTYPING: REFINEMENT

Get feedback from your pilot teams

Refine channels, tabs, default pages, all aspects of spaces

Consider naming conversions for the long term

Use interviews, feedback forms, workshops, etc.

Refine now before templatization

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KEY 4: TEMPLATIZATION

Repeatable, automated processes promote adoption

- Prescribed solutions with documented outcomes

Microsoft 365 provides multiple temptation technologies

- Graph, PowerShell, Teams templates, PnP provisioning

Proper path dependent on budget, time, and resources

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KEY 5: END-USER REQUEST PROCESS

Planning / architecture: IT & Management of Provisioning

- Who will be allowed to provision?
- What are the requirements?
- How will someone provision?

Interface

- Microsoft Forms, Power Apps, AvePoint MyHub, custom applications, SPFX / Teams app in tab, email, bots, teams channels

Process: Automated, semi-automated, or manual approval / provisioning processes

- Power Automated, Logic Apps, 3rd party

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KEY 6: TEST, QA, & REFINE

Validate solutions based on requirements and processes

Defect Management – track issues and resolutions

Set criteria for pass/fail

- Risks & Contingencies – have secondary collaboration options

Extended testing – include broader data evidence

- What has been tested
- What was not tested enough

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KEY 7: NEVER STOP THE EVOLUTION

Encourage and support feedback during rollout and beyond

- Keep listening to end users, champions, and provisioning managers
- Empower your champions
- Keep processes updated based on feedback and experiences
- Focus on training, support, updates, and reports

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BONUS KEY: STAY CURRENT

Stay up-to-date on what's possible for constant improvement

- docs.microsoft.com
- Microsoft 365 roadmap
- Microsoft 365 Champions program
- Find reliable tech blogs
- Find reliable podcasts
- Follow AvePoint / PixelMill Webinar series
- "Attend" ShiftHappens, Microsoft Ignite, and other digital workspace conferences

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Teams Templates will be getting more interesting soon…

https://techcommunity.microsoft.com/t5/microsoft-teams-blog/cre

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"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	X No external sharing
EXPIRATION/ RETENTION	6 Months after last accessed
WHO CAN CREATE	All requests through Central IT
RECERTIFY MEMBERS	after 3 Months

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Decision Trees Map the Business to the Templates

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

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Microsoft Teams

Search or type a command

Activity

Chat

Teams

MyHub

Calendar

Files

Apps

Help

MyHub Chat Home Start a request Workspaces Requests About

New request > New Workspace Request

Are you working on a project with more or less than 5,000 people involved?

Less than 5,000 Users

Do you already have access to a workspace for the collaboration required?

No

Do you require chat based functionality to communicate with your team? Or is email functionality more appropriate for communication?

Chat Based Is Needed

Do you need to work with individuals that don't work for our company? These individuals may be contractors or other outside laborers.

Select one

Internal Only

Outside Access Required

Outside Access Required

Questionnaire Management > Workspace Re...

1 2 3

Save As Draft | Save and Activate | Cancel

Please drag your desired questions and services from the left pane onto the workspace to configure the question order and logical branches in the right pane. You can view the step-by-step guide for reference.

Questions

Are you working on a project with more or less than 5,000 people involved?

Do you already have access to a workspace for the collaboration required?

Does your project require custom development to display information?

Services

Add End Points Automatically

Change Management(2)

Change Site ownership

Change SharePoint Quota

Create(15)

View: 75%

Start

Are you working on a project with

More than 5,000 Users

Less than 5,000 Users

Do you need to share one file? Or c

Do you already have access to a wo

I need to share one file

I need to share many files

Yes

No

If you requir

Do you require chat based function

Please consi

Does your project require custom d

Chat Based Is Needed

Email Collaboration Is Preferred

Do you need to work with individua

Do you need to work with individua

Yes

Is your primary purpose to collabor

Internal Only

Outside Access Re

Create External Private Group

Yes

No

Modern Team Site

Internal Only

No

Create Internal Private Group

Outside Access Required

Publishing Site

Create External Team

Create Private Team

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Learn more here!

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Using and Tailoring Microsoft Teams for Your Organization

How to handle surging activity in Teams and boost security and compliance

Claim My Free eBook

Make Teams More Productive For Your Organization

Microsoft Teams has seen an unprecedented surge in adoption and usage since March 2020 due to an increase in remote work and its use as being the premier hub for collaboration and teamwork. However, with this surge organizations are realizing that they cannot set and forget their Teams deployment as issues can begin to arise.

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Chapter 1: Introduction

Chapter 2: Introductory Overview of Teams Components

https://www.avepoint.com/ebook/tailoring-microsoft-teams

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Request a demo!

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

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thank you

Gracias	ευχαριστώ	Danke	Grazie	благодаря
Hvala	Obrigado	Kiitos	شكراً	Tak
Ahsante	Teşekkürler	متشكرم	Salamat Po	감사합니다
Cám ơn	شكريه	Terima Kasih	Dank u Wel	Děkuji
நன்றி	Köszönöm	ありがとうございます	ขอบคุณครับ	Dziękuję
谢谢	Tack	Mulţumesc	спасибо	Merci
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