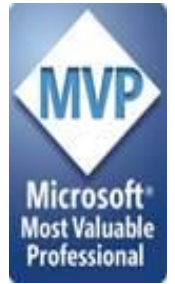# Teams, Channels, Groups and Site Governance, Automation, and External Sharing

Tuesday January 21, 2020

Peter Carson

- President, Extranet User Manager
- Office Apps and Services Microsoft MVP
- peter.carson@extranetusermanager.com
- blog.petercarson.ca
- www.extranetusermanager.com
- Twitter @carsonpeter
- President Toronto SharePoint User Group

MVP
Microsoft®
Most Valuable
Professional

Logan Guest

Sales

- e: logan.guest@extranetusermanager.com
- p: (647) 265-8256

Customers around the Globe

85+ Customers Deployed Globally

Agenda

- Introductions
- Background
- Provisioning
- Demo
- External Sharing
- Summary, Q&A and Closing

http://eum.co/resources/teams-provisioning
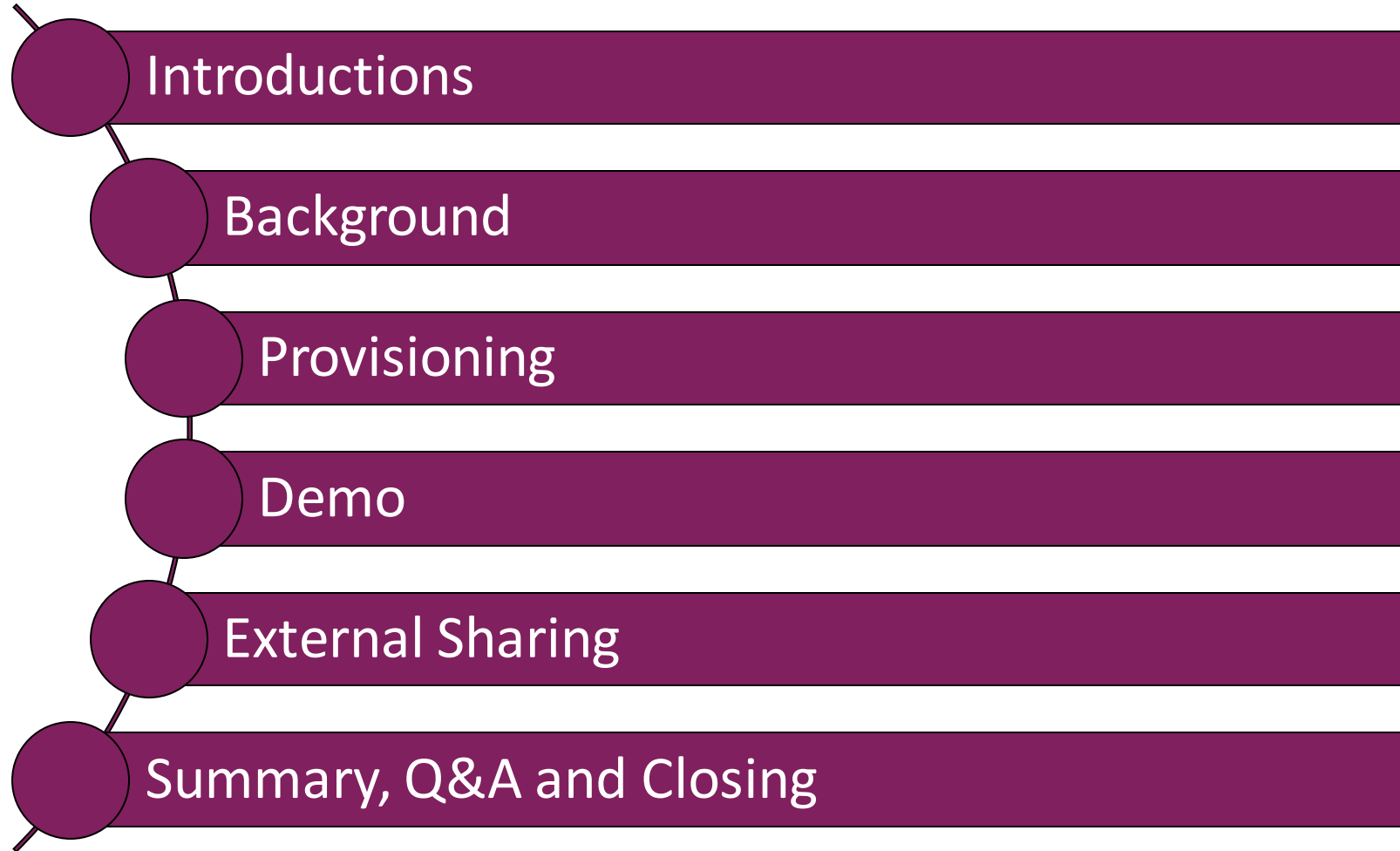
Whitepapers & eBooks

### Coming Soon – Teams, Channels, Groups and Site Governance, Automation White Paper

The next evolution of our white paper on deploying our open source provisioning solution, supporting the following:

- Team and Team Channel request form web parts that work in Teams and SharePoint
- Azure Logic Apps workflow and Azure Automation provisioning
- Templating of OneNote and Planner as part of new Teams and Channels, and Teams tabs setup

Site Provisioning Whitepaper

This open source solution from Extranet User Manager empowers business users to create sites, Teams, and Office 365 Groups with appropriate structure and governance, without waiting on IT administrators to complete process. With this foundation in place the solution is completely automated within SharePoint Online, Microsoft Flow, and Azure Automation, saving users valuable time while also maintaining control over the environment.
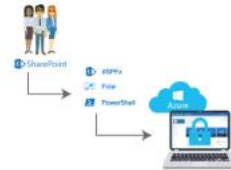
Articles

Coming Soon – Teams Resources

This article has a great set of links and resources for Teams Adoption, both for end users and admins.

The Business Case for Site Provisioning

When left unchecked Office 365 groups can get out of hand very quickly. On the other hand, if you restrict users access too much to groups then they will never adopt them, and they are a very powerful tool for organizations. In this blog we discuss some of the business goals that will be solved by our site provisioning solution, how it is built, and the major takeaways for business users.

Upcoming Events

Webinar: Teams, Channels, Groups and Site Governance, Automation, and External Sharing

With the overwhelming interest in our existing Open Source Site Provisioning solution, we had no choice but to extend its current capabilities. Initially focused on SharePoint site creation, it is now also a Microsoft Teams solution. Not only does it provide governance and automation around the creation of new Teams, but it also manages the channel creation process, including setting up the appropriate tabs in Teams, sections in OneNote, Planner buckets and tasks, and structure in SharePoint.

Register for Webinar

Webinars

Microsoft Teams, Office 365 Groups, and SharePoint Sites Provisioning

While Microsoft's modern experience has really come together, there are so many ways to create sites, groups, and Teams. Learn how to standardize both the approach and the result with an open source request form (SPFx), approvals (Flow), and provisioning process (PowerShell, PnP, Azure Automation). This open source solution from Extranet User Manager empowers business users to create Sites, Teams, and Office 365 Groups with appropriate structure and governance, without waiting on IT administrators to complete the process.

Microsoft Teams, Office 365 Groups, and SharePoint Sites Provisioning

Tuesday, September 10, 2019
12 – 1 PM Eastern Time

Poll – Which do you use today?

Office 365

SharePoint On Premises

Microsoft Teams

Microsoft Flow / Logic Apps

Microsoft PnP (Patterns and Practices)
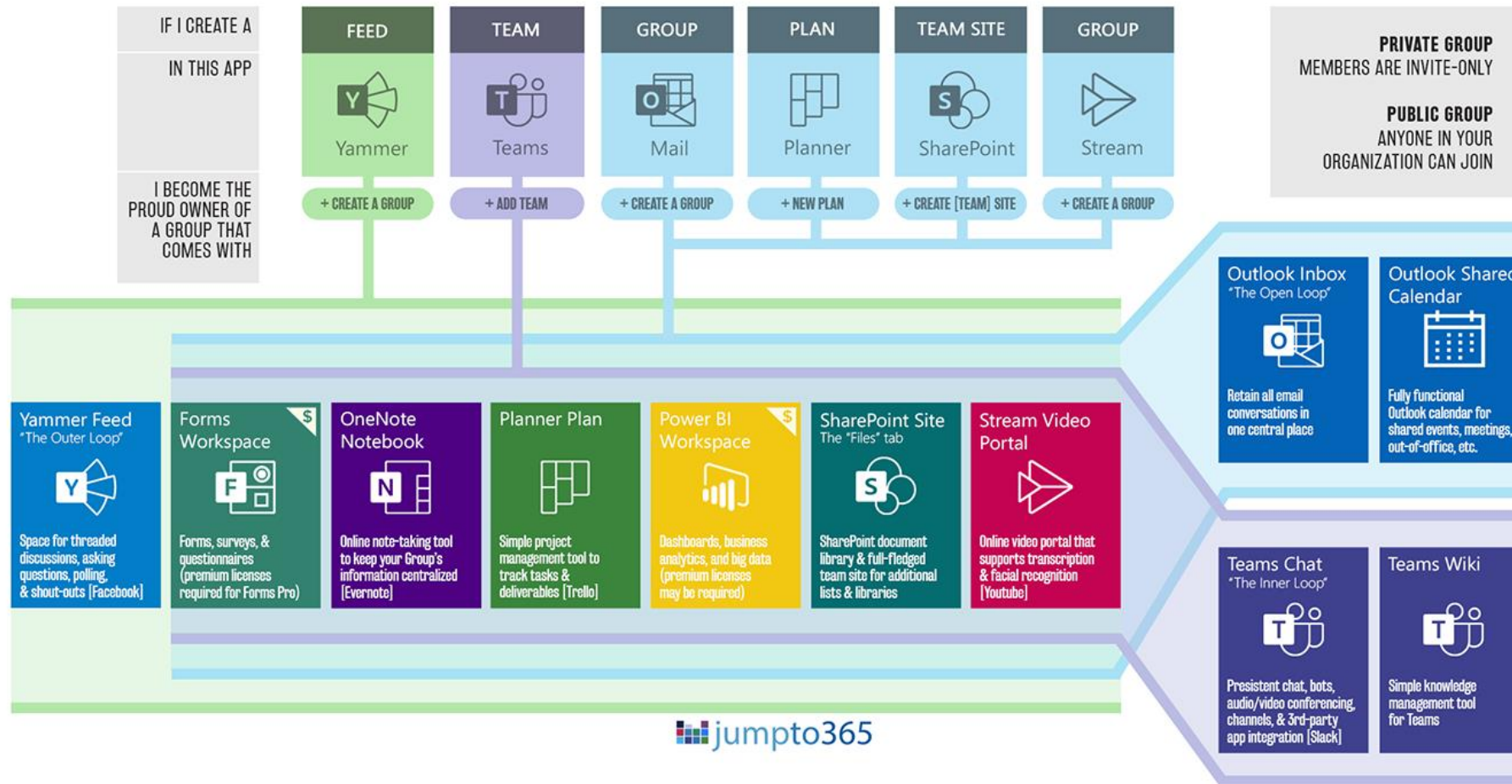
Microsoft Teams

- **Replacing functionality of Skype for Business:**
    - Persistent chat
    - Presence
    - Audio and video calls
    - Online meetings and sharing
    - Files (SharePoint)
- **Org wide channel eliminates need for Yammer for most organizations**
- **Microsoft has positioned Teams as the launchpad to O365 services**
- **Each Team is connected to an O365 Group**

https://products.office.com/en-us/microsoft-teams/group-chat-software

Office 365 Groups

Matt Wade - https://www.jumpto365.com/infographics/everyday-guide-to-office-365-groups

SharePoint Online

- **Communicate and Collaborate**
- **Corporate Intranet**
- **Team Sites**
- **Forms and Workflows**

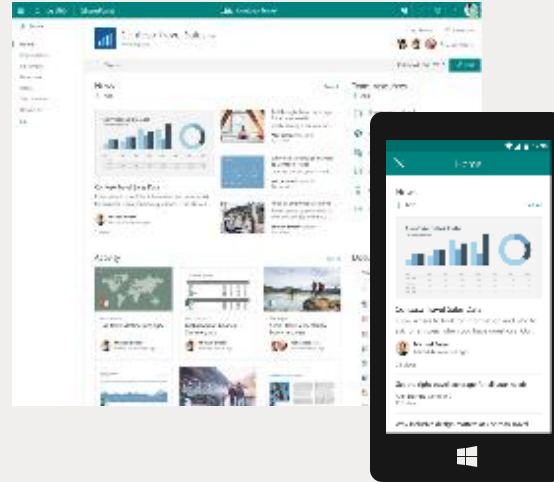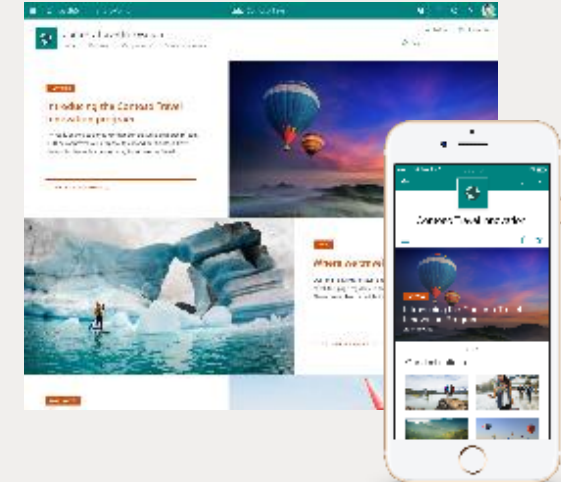# Three places to work

Personal files

Team sites
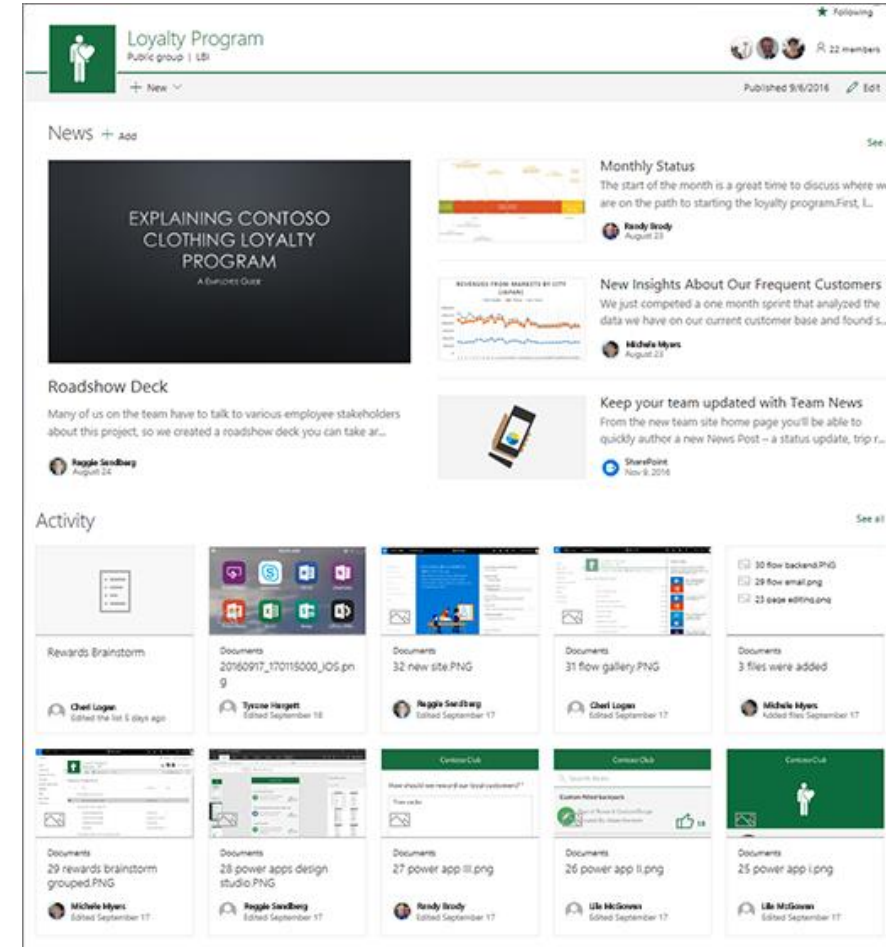
Communication sites
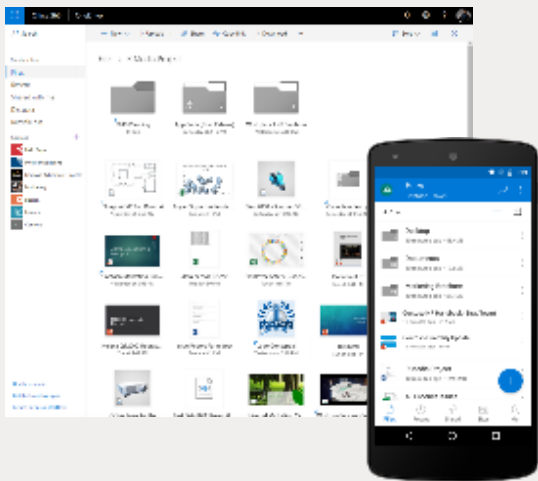
Private by default

Share content with your group

Inform and engage a broader audience

SharePoint – Team Sites

- By default, all members are content authors
- Department, Committee, or Project Collaboration
- External Sharing with Clients, Vendors, or Partners
- Collaboration-focused

Project Sites

Project Management Wish List

- **Microsoft Teams for project member communication**

- **Templated SharePoint Team Site**
  - Full SharePoint document libraries
  - Custom lists - Tasks, Issues, Risks, Decisions
  - Sharing with External Users

- **OneNote for ad-hoc note taking**

- **Planner for simple task management**

- **Stream for conference call recordings**

- **Exchange email and calendar support for external communication**

- **External systems**
  - Financial, time tracking, bug tracking

Notebook/OneNote

- **Tool for unstructured, free-form note taking**
- **Create Sections and Pages**
- **Add text, images, audio, video, hyperlinks, etc...**
  - Embeded Video cannot be added in OneNote Online, but once embedded can be played in OneNote Online
- **Can be opened in OneNote application and synchronized**
- **Multiple people can edit the same notebook simultaneously**

https://products.office.com/en-us/onenote/digital-note-taking-app

Planner

- **Simple task management tool**
- **Plan is created with each Office 365 Group**
  - Conversely, an Office 365 Group will be created for each Plan
  - If either is deleted, both are deleted
  - Additional Plans can be created for a Group
- **Plans consist of Buckets and Tasks**
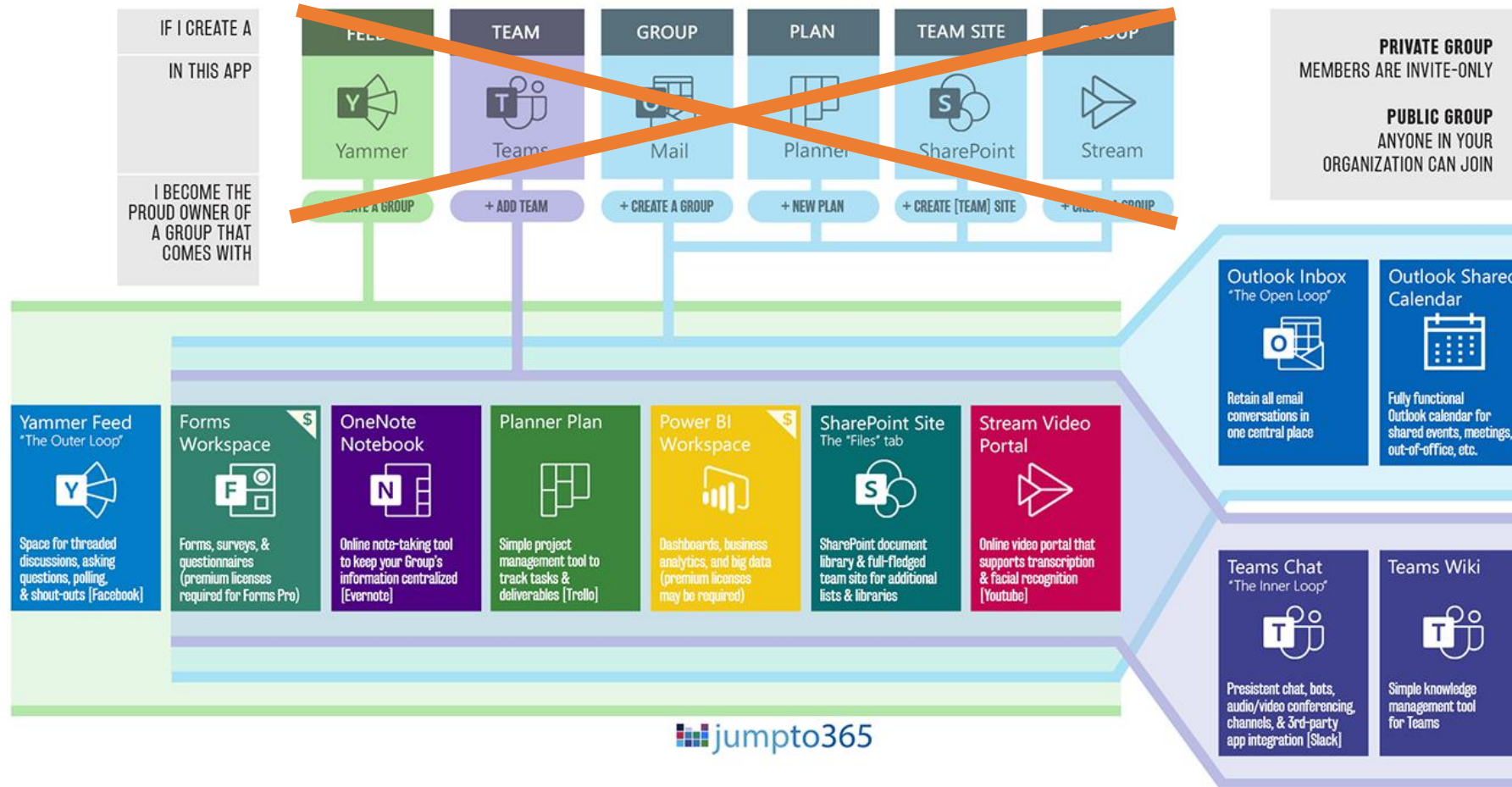- **Tasks may be assigned, contain checklists, due dates, attachments, description and comments**

https://products.office.com/en-us/business/task-management-software

Stream

- **Live and on-demand events in Office 365**
- **Teams puts recordings into Stream automatically**
- **Groups and Channels**
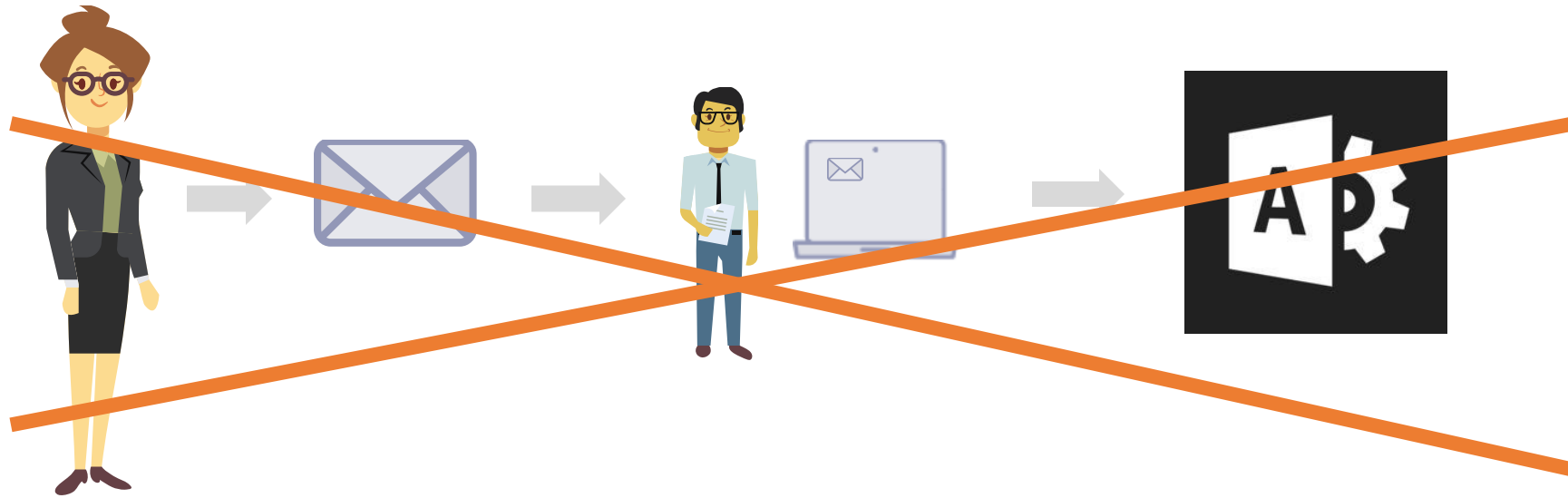- **Speech to text, auto-generated closed captions, and face detection features**

https://products.office.com/en-ca/microsoft-stream

Provisioning Teams Office 365 Groups and SharePoint Sites

Office 365 Groups
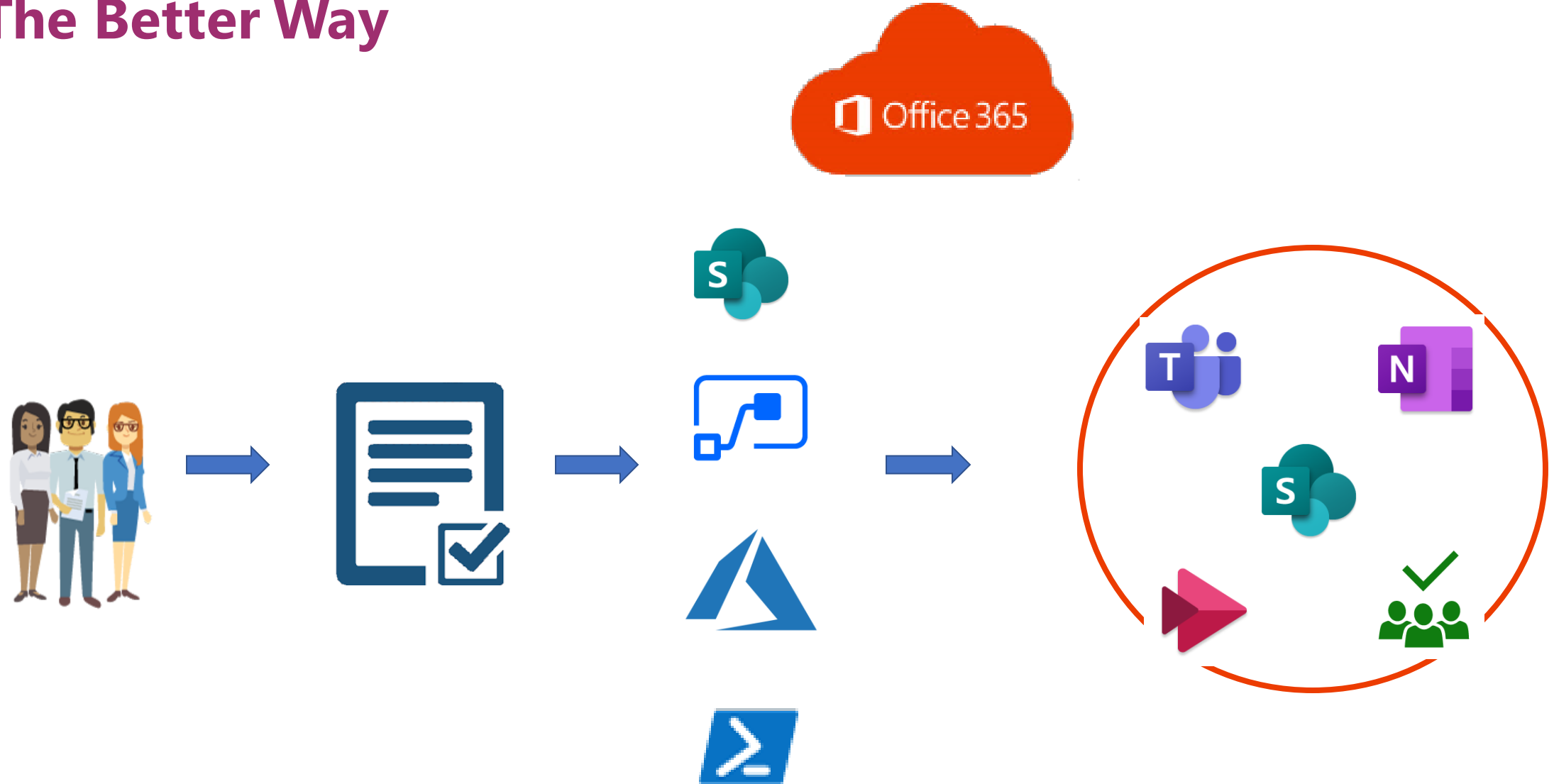

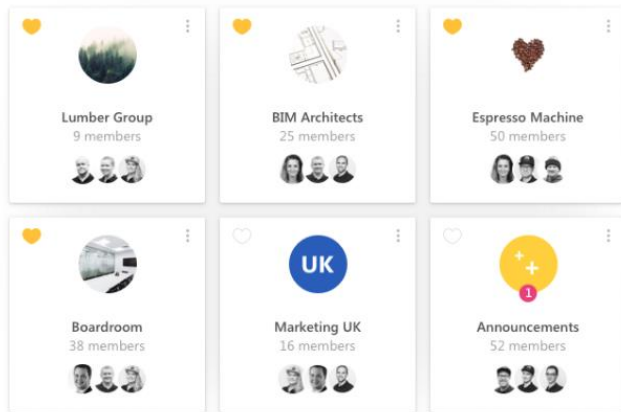Matt Wade - https://www.jumpto365.com/infographics/everyday-guide-to-office-365-groups

Manual IT Provisioning

The Better Way

Third Party Alternatives

Valo Teamwork

https://www.valointranet.com/teamwork/

AvePoint CLOUD GOVERNANCE

Provisioning

Management   Lifecycle

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

SG:Apricot

12 unused groups detected   Entrust all

Marketing Team   1 owner
Test group please ignore   4 owners
John's office baby shower   3 owners
Test   8 owners
HR Recap 2017   6 owners

https://sharegate.com/products/sharegate-apricot
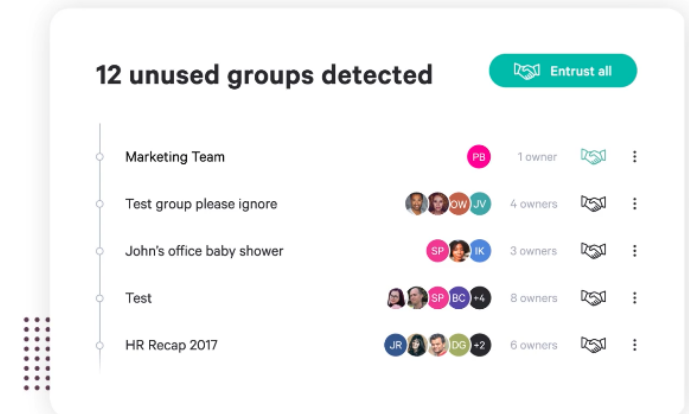
Solution Requirements

- Self service form for end users
- Approvals if required
- Easily extensible and customizable for each organization's requirements
- Leverage out of the box and customized site templates
- Support for Modern sites, Office 365 Groups, and Microsoft Teams
- No Visual Studio or compiled code needed. PowerShell and configuration that IT Pros can get their heads around

Supporting Technologies
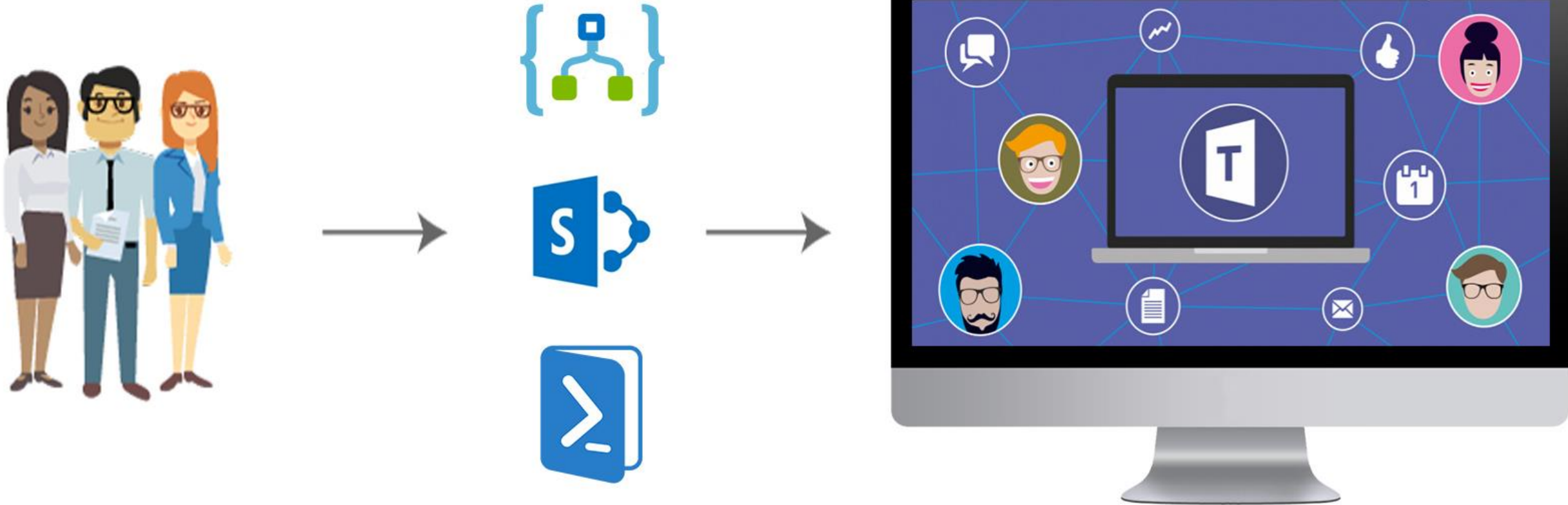
Envision IT Teams Governance

- **Create a Microsoft Team, Office 365 Group, and Modern Team Site for each client**
  - Includes a OneNote notebook, Stream Group, and Planner Plan
- **As new projects are started**
  - Create a channel in the Team
  - This creates a folder in SharePoint
  - Create a new Section in OneNote
  - Create a new Channel in Stream
  - Create a new Plan in Planner
  - Setup the Tabs in Teams to connect everything

When Creating a Team You Get

- **Office 365 Group**
- **SharePoint Modern Team Site**
- **OneNote notebook**
- **Planner Plan**
- **Stream Group**

Requesting a Team, Office 365 Group, or SharePoint Site

Team / Site Request

Division *
```
Demo                                                    ⌄
```

Site Template *
```
Modern Team Site                                        ⌄
```

Title *
```
```

Purpose
```
```

Alias
```
```

Public Group
🔘 Yes

Create Team
🔘 Yes

Submit **Cancel**

- **SPFx web part to make the self-service request**

- **Can be used from Teams or SharePoint**

- **Supports different Templates grouped under different Divisions**

- **Options for creating Teams, Groups, Sites, OneNotes, and Plans**
  - PnP template for SharePoint Site
  - Planner template for Buckets and Tasks
  - Templating of Tabs in Teams for above

- **Form fields are dynamically generated based on template content types**
  - Easy to add or change fields on the form – no programming required

Sites List Web Part

Sites

Private Group - No Approvals	**Private Group with Approval**	**Public Group - No Approval**	**Public Group with Approval**
This group is private and is not shown on the list page of all public groups. To join the group you need the invitation URL. Joining a group is done immediately with no approvals required.	This group is private and is not shown on the list page of all public groups. To join the group you need the invitation URL. Joining a group submits a request for approval before you are added to the group.	This is a Public Group that anyone can join. It does not require approval.	This is a Public Group that anyone can request to join. The user will be notified via email once the request has been approved.

Demo Sites

Private Group - No Approvals
Private Group with Approval
Public Group - No Approval
Public Group with Approval

All Sites

A B C E F H I K L M N O P R S T V W

About Us
Annual reports

- **Displays Sites from the Sites list**
- **Filters down to sites under a Parent URL**
- **Different views**
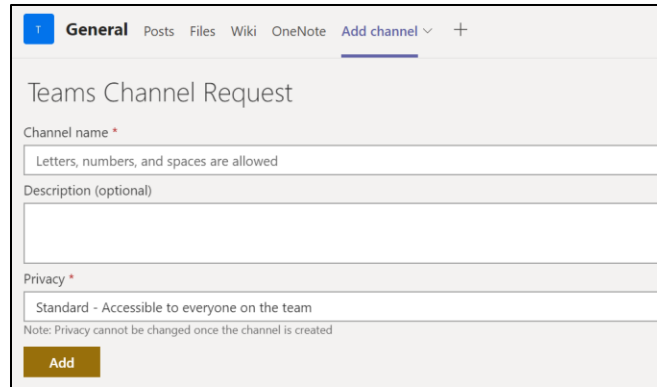 - Tile
  - List
  - A – Z List

Teams Provisioning Demo

When Creating a Team Channel You May Want

- **New OneNote Section**
- **New Planner Plan**
- **New Stream Channel (different than a Teams channel)**
- **Tabs to each of these**

Office 365 Group Elements

Teams - Create New Channel - **Tabs**

SharePoint - Document Library Folder

OneNote - Add Notebook Section

Stream - Create Group Channel

Planner - Add Multiplan

Team Channel Provisioning Demo

Solution Overview

- **SharePoint list is used to track existing sites and new site requests**

- **SPFx webpart form used to enter requests**

- **Microsoft Flow is triggered when new requests are added**

- **Approval workflow can be part of this**

- **Azure Automation is used to run the PowerShell scripts and create the SharePoint site, Microsoft Team, EUM Group, and wire everything together**
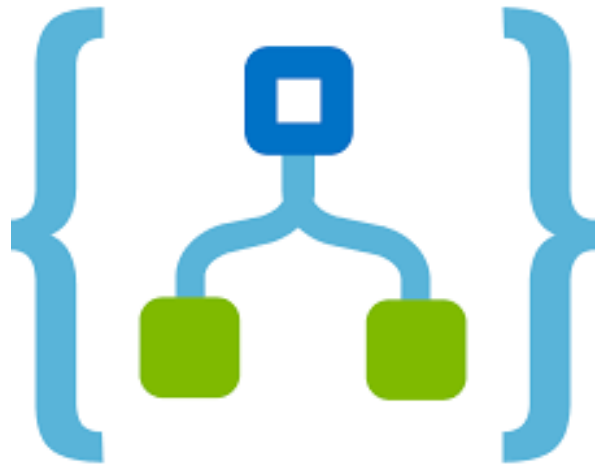
Power Automate (Flow)
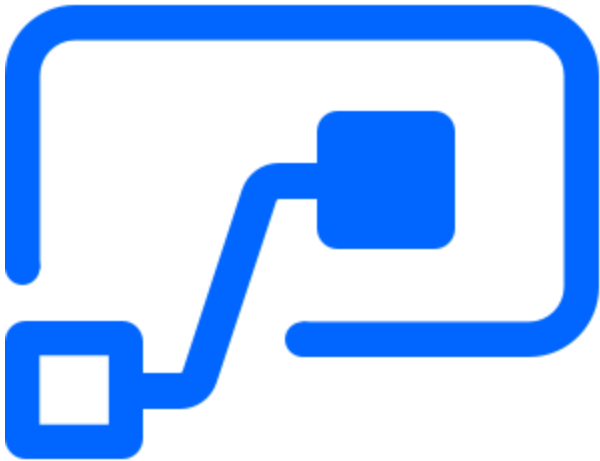
- **Create automated workflows between your favorite apps and services**
- **Get notifications, synchronize files, collect data, and more**
- **Connect Triggers with Actions**
- **Supports both Microsoft and third party apps**
- **Standard connectors used in this solution**
  - SharePoint Online
  - Approvals
  - Azure Automation
  - Office 365 Outlook
- **Custom connectors can connect to any system**
  - EUM

https://flow.microsoft.com/en-us/

Azure Logic Apps

- **Platform underneath Power Automate**
- **Same designer**
- **Slightly different set of actions**
  - No pre-built approval
- **Visual Studio integration**

https://azure.microsoft.com/en-ca/services/logic-apps/

Power Automate vs. Logic Apps

Power Automate

- **Simpler for citizen developers**

- **Using standard connectors leverages built-in Office 365 licensing**

- **Premium and custom connectors need premium licensing**

- **https://flow.microsoft.com/en-us/pricing/**

Logic Apps

- **Azure portal and Visual Studio and be daunting**

- **Uses the same connectors**

- **Pay per action executed can be much cheaper**

- **https://azure.microsoft.com/en-us/pricing/details/logic-apps/**

Power Automate vs. Azure Logic Apps Licensing

Power Automate

- **700 * number O365 subscriptions runs per month**
- **Standard connectors only – just O365**
- **Per user plan - $19 per user/month CDN**
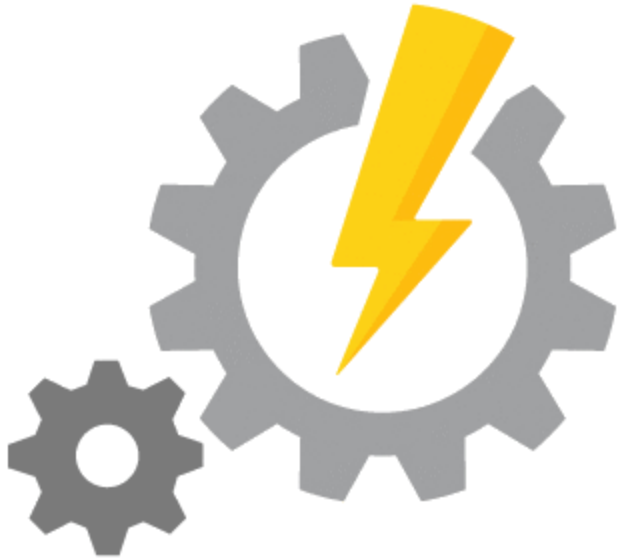- **Per flow plan - $611 per flow**
  - Minimum 5 flows

https://flow.microsoft.com/en-us/pricing/

Azure Logic Apps

- **$0.000032 per Action**
- **$0.00016 per Standard Connector**
- **$0.00128 per Enterprise Connector**

https://azure.microsoft.com/en-us/pricing/details/logic-apps/

Azure Automation

- **Run PowerShell scripts in the cloud**
- **No management of the VM needed, Azure takes care of that**
- **Very cost effective**
  - 500 minutes of runtime included free per month
  - $.002/minute USD after that

https://azure.microsoft.com/en-ca/services/automation

SharePoint Patterns and Practices

Code samples

Reusable components and solutions

Guidance documentation

Monthly community calls

Case Studies

SharePoint Framework

SharePoint add-ins

Microsoft Graph, Office 365 APIs etc.

Remote provisioning and client side development

http://aka.ms/SharePointPnP
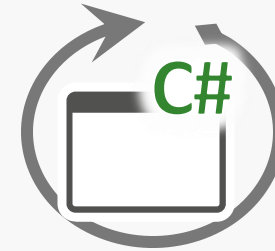
PnP Provisioning Engine

Part of the SharePoint PnP initiative deliverables

- Open source, community-driven

Released originally spring 2015

Can be used using managed code or with PnP PowerShell

Extract templates from existing sites and optional serialization

C#

Available as NuGet package for code and also from PnP PowerShell

Connectors

Connectors to store templates and potentially assets to file system, SharePoint or Azure storage.
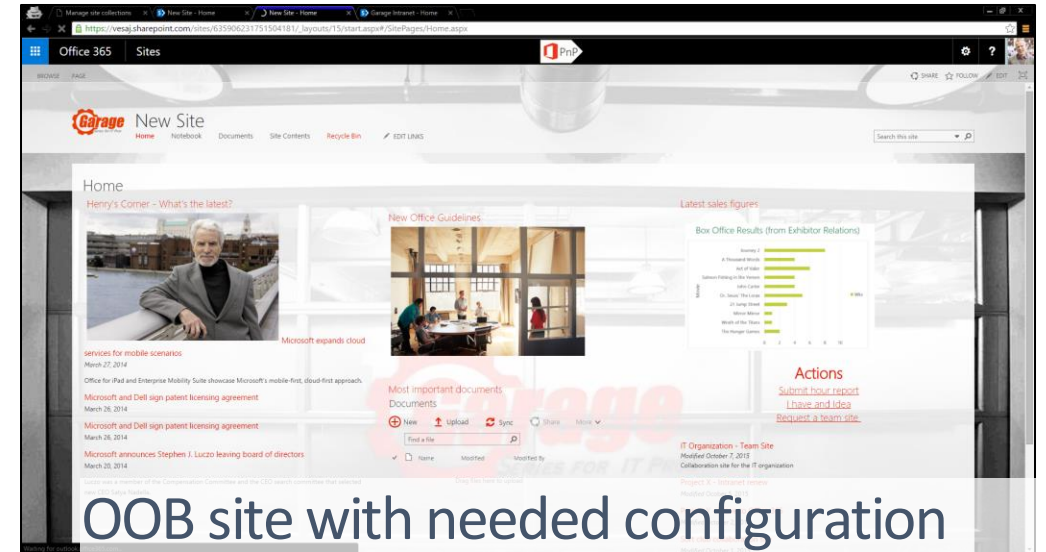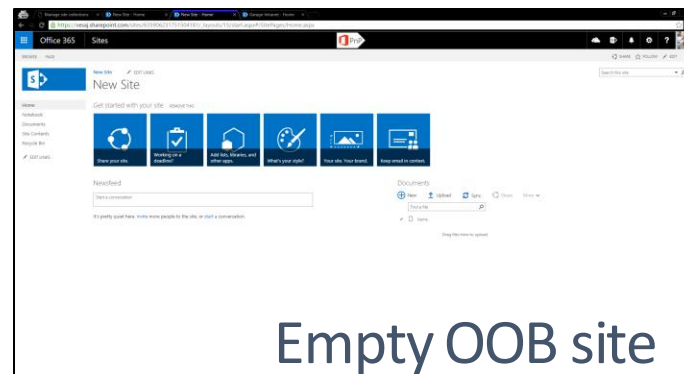
JSON   XML

You can use code to create and apply templates, but you can also serialize them, if needed
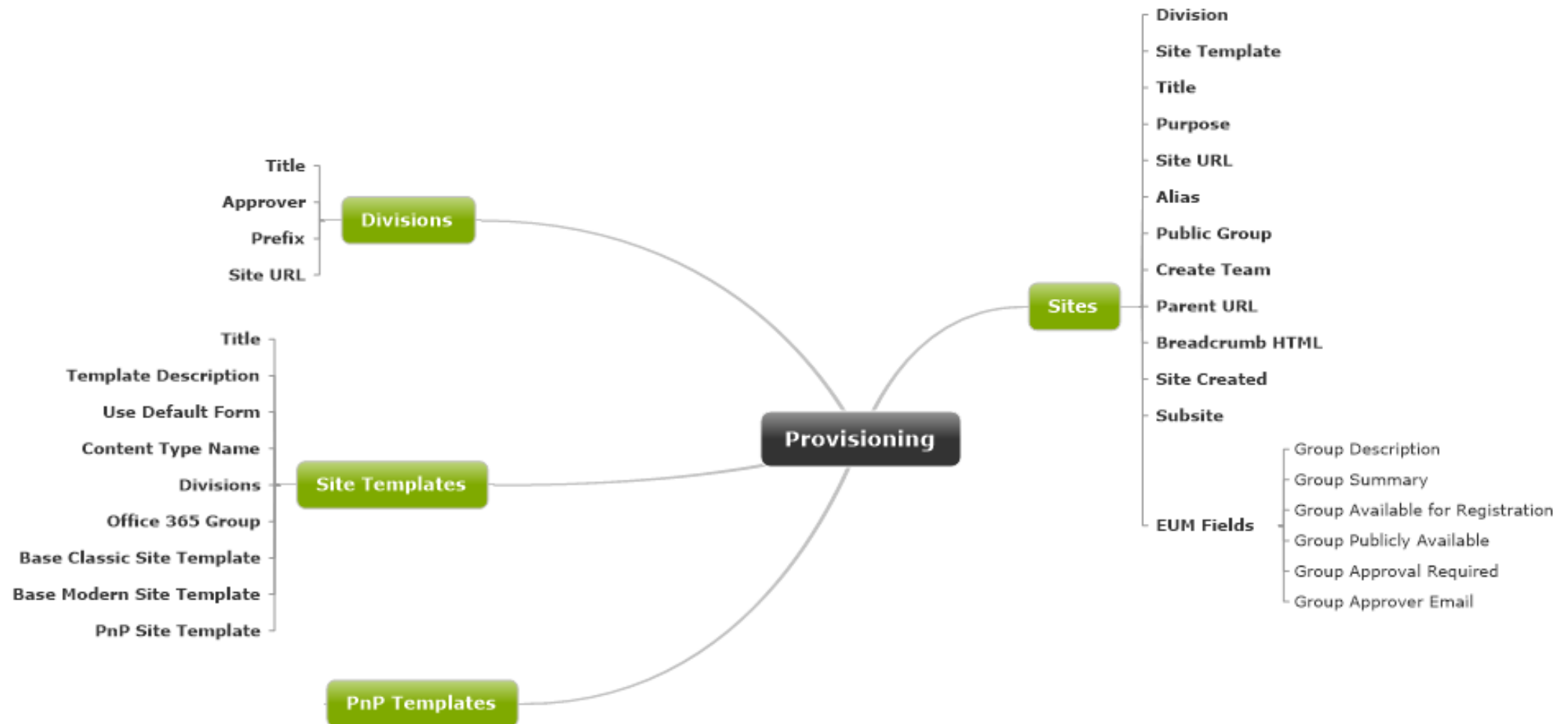
.pnp

OpenXML based template with configuration and assets, like images or theme definitions

PnP Provisioning Engine – Export/Import

Template site

+

Empty OOB site

=

OOB site with needed configuration

Information Architecture

Project Documentation

- **Source code is available on GitHub at** https://github.com/petercarson/eum-sites/tree/V3

- **Full consolidated whitepaper with step by step instructions** https://www.extranetusermanager.com/resources/articles/site-provisioning-whitepaper-v2

External Sharing

Sharing Options

- **Unstructured sharing of individual documents or folders through Office 365**

- **Sharing of the entire SharePoint site through Azure AD B2B**

- **Making external users members of the Microsoft Team or Office 365 Group**

- **Structured sharing through Extranet User Manager**

Envision IT Client Sharing

- **We share at the site level using Extranet User Manager (EUM)**

- **Setup a client group in EUM**

- **Set permissions in client site**
  - Everything shared read-only except Private Documents
  - Client Documents folder has edit rights

- **Add the Group Member web part to the site**

- **Invite client contacts to the group**

Additional Resources

Extranet User Manager Past Webinar
Unstructured vs. Structured Extranets in Office 365

Eum.co/resources/events/collabtalk-unstructured-vs-
structured-extranets-in-office-365

Eum.co/resources/events/archived-events

Extranet User Manager Test Drive

Eum.co/test-drive

Wrap-Up Points

- **Microsoft Teams and Office 365 Groups are a great way to manage projects**
  - Teams, SharePoint, email, calendar, OneNote, Planner
- **You don't need to start with everything, choose what makes sense for your organization**
- **Be prepared for change, Office 365 is changing quickly**
- **Decide which conversation formats make sense for your teams**
  - Outlook, Yammer, Teams (persistent chat)
- **Put your governance in place**
- **What is your external user policy?**
- **Figure out your Information Architecture and site templates**
- **Build a provisioning process**

Upcoming Events

Extranet User Manager Webinar
Power Automate (Flow) vs. Azure Logic Apps
February 25, 2020
12 pm – 1 pm EST

Eum.co/events

May 19-21, 2020
Las Vegas

https://sharepointna.com/

June 8-10, 2020

https://www.collabsummit.eu/

Thank you!

Questions?