AvePoint

Empower Hour: Teams Templates & Top Tips

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AvePoint
CMO

Agenda

Why Teams Templates

Using Microsoft Teams Client

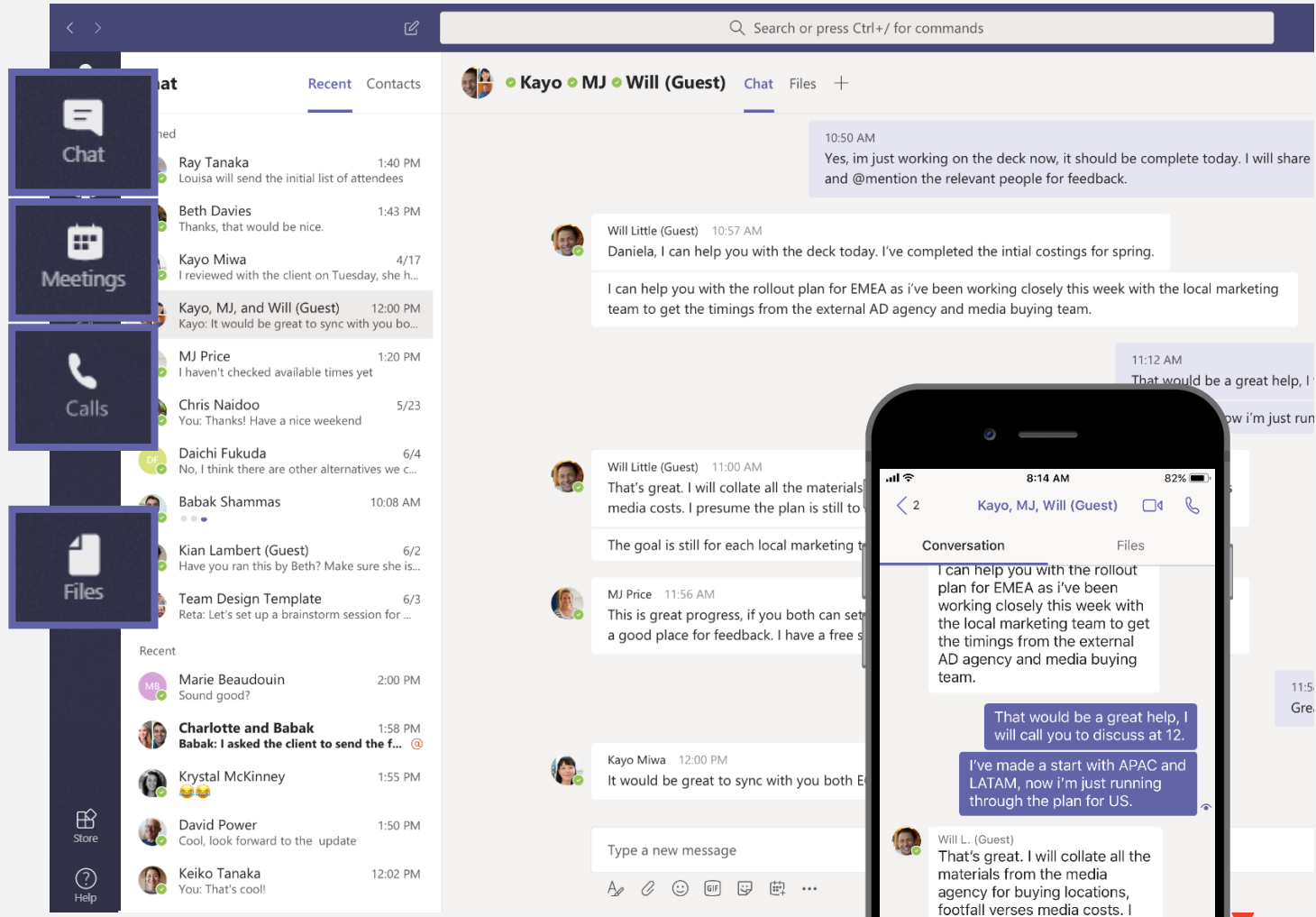
Programmatic Creation

Advanced Solutions

Microsoft Teams

The hub for teamwork in Microsoft 365

- Persistent 1:1 & Group Chat
- Enhanced Collaboration
- Enterprise Communications
- Customize & Extend



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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

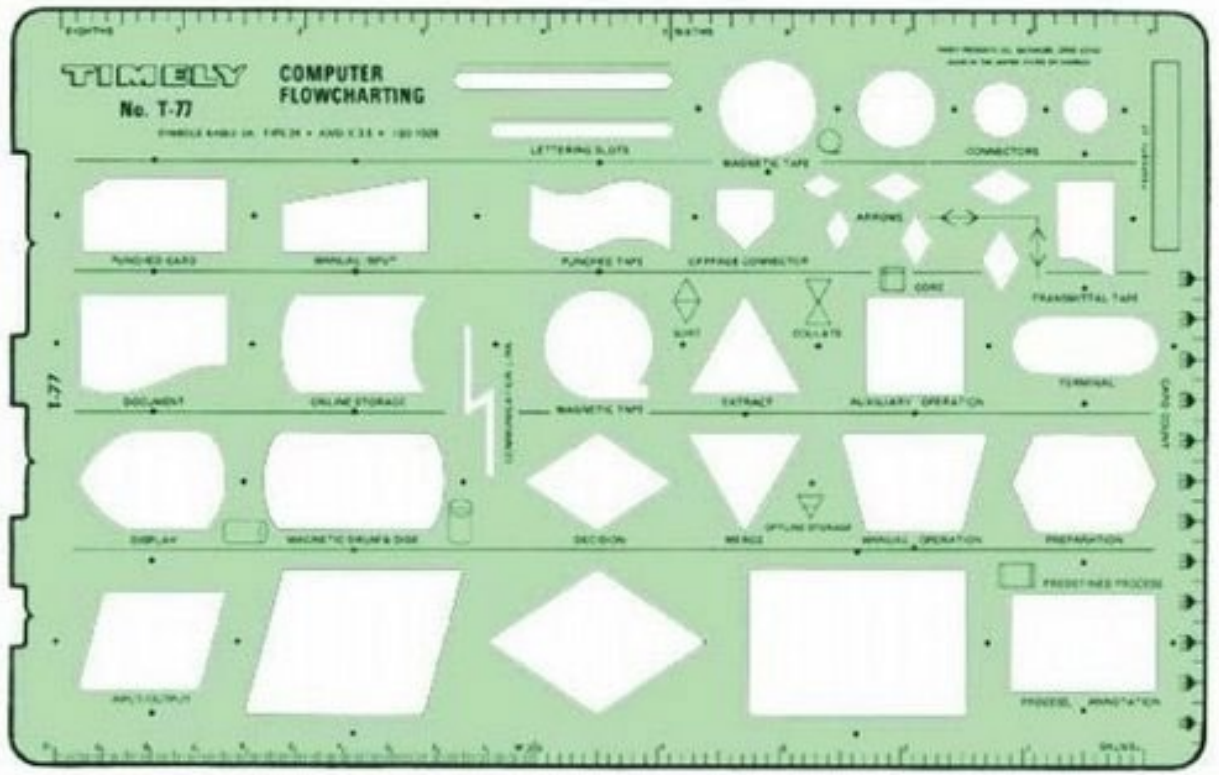
   - something that serves as a model for others to copy.
     "the plant was to serve as the template for change throughout the company"

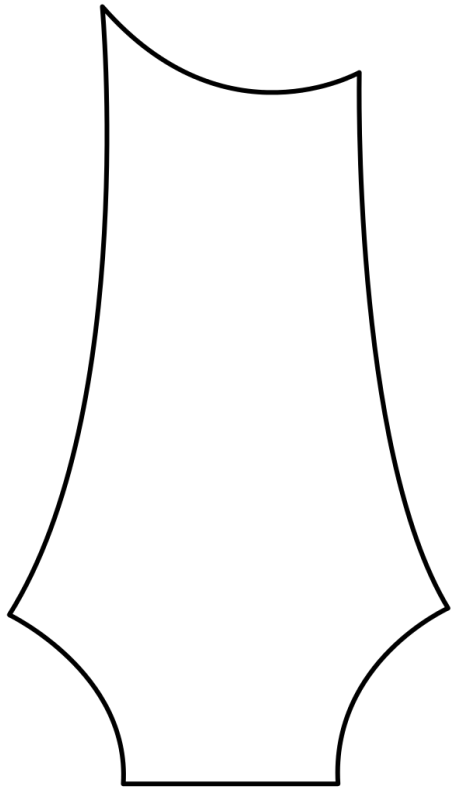
     synonyms: model · pattern · blueprint · archetype · prototype · sample · example · [more]

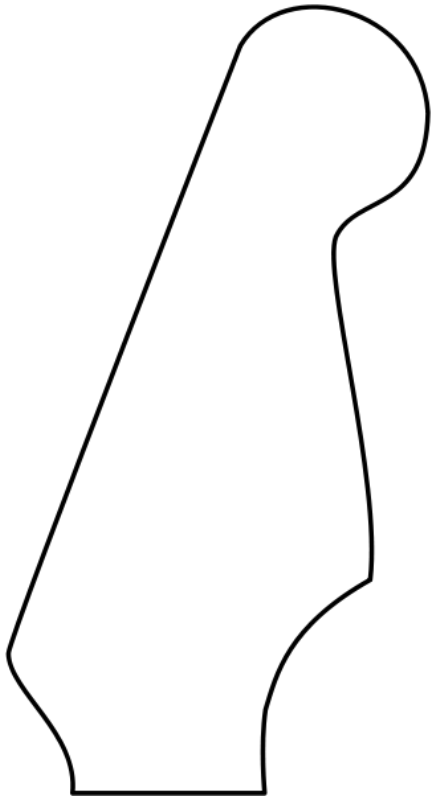
   - *computing*
     a preset format for a document or file, used so that the format does not have to be recreated each time it is used.
     "a memo template"

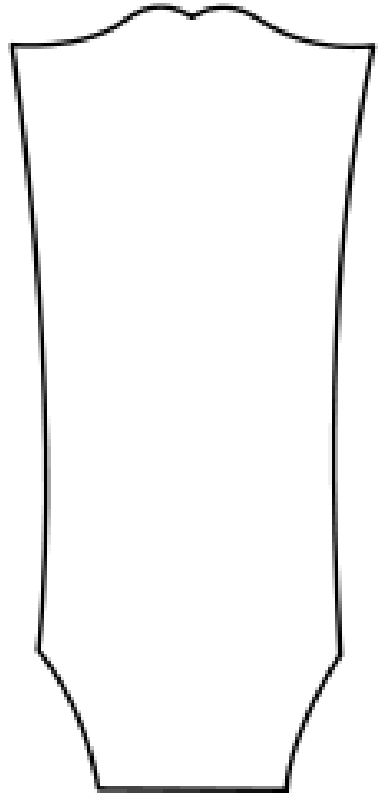
2. a timber or plate used to distribute the weight in a wall or under a support.

Mike's first template



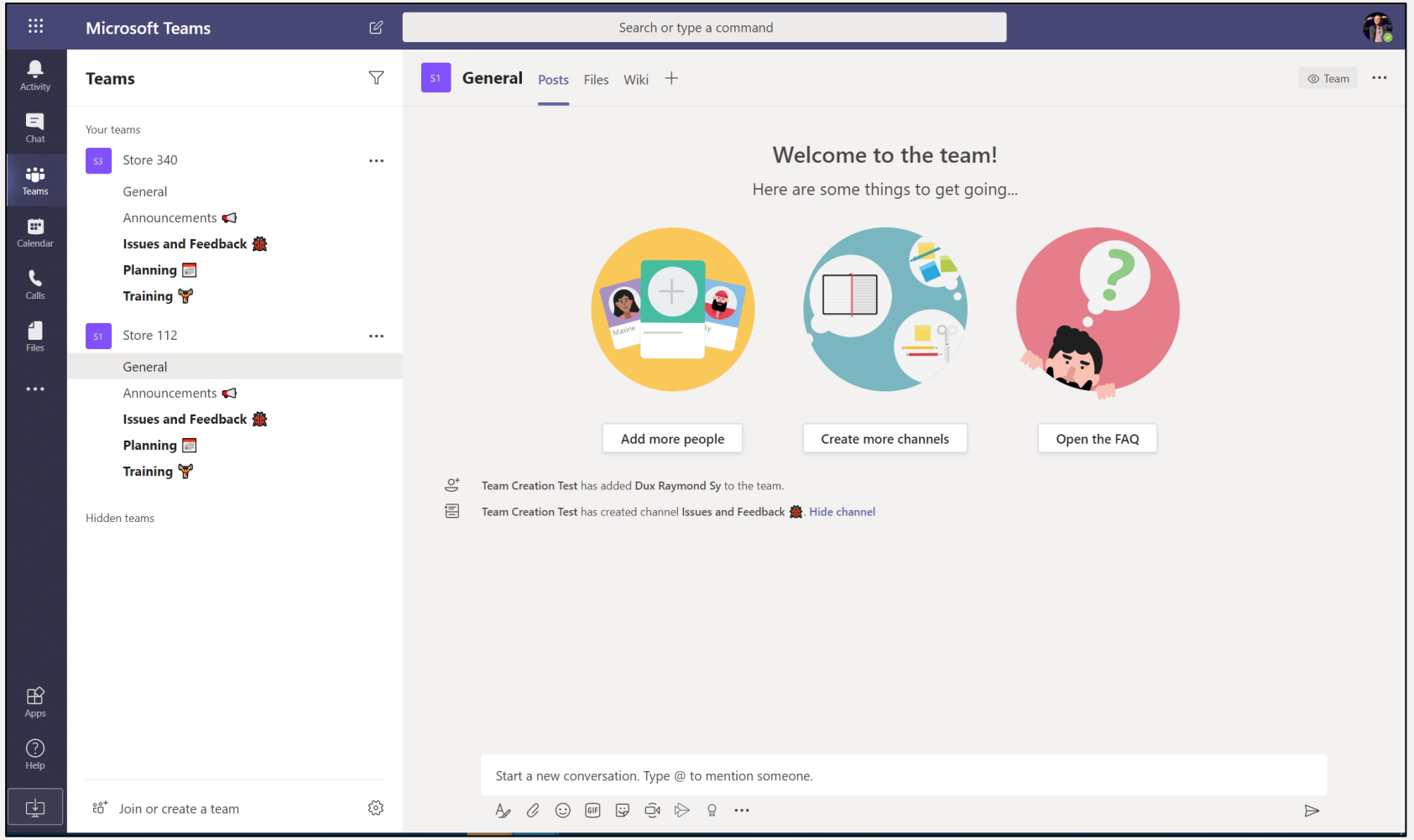






Templates

Microsoft Teams Templates



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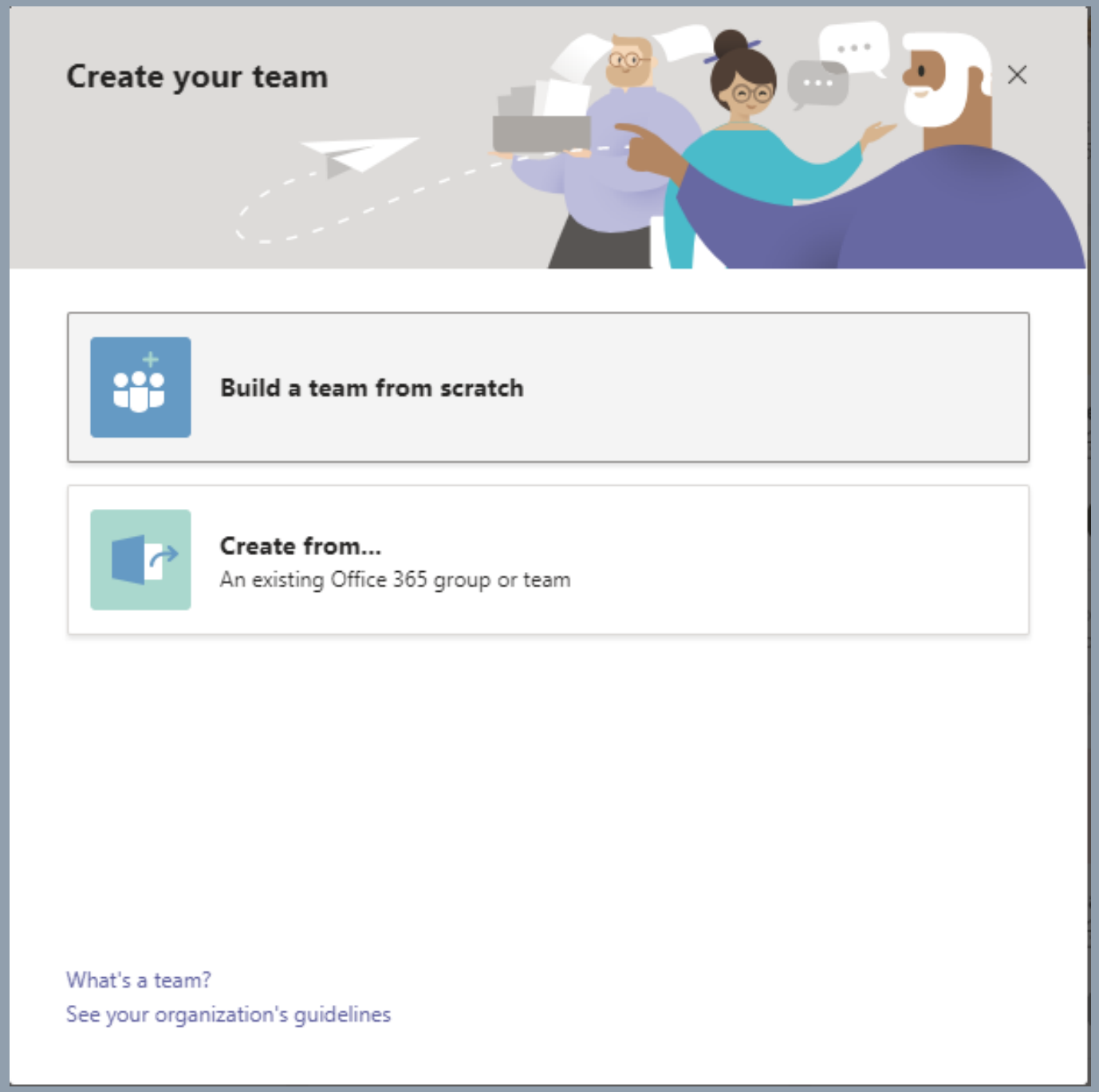
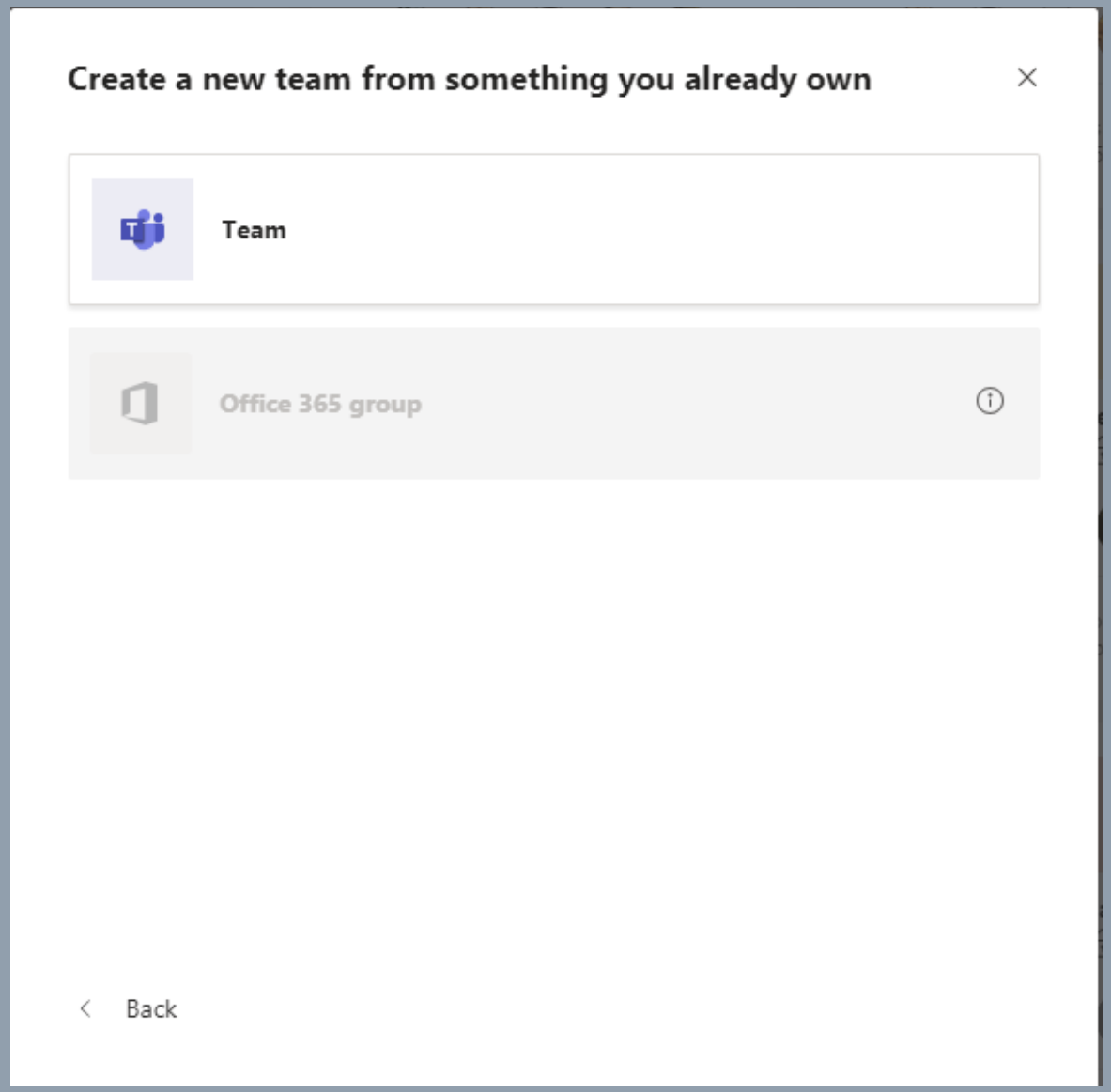
Leverage Microsoft Teams Client

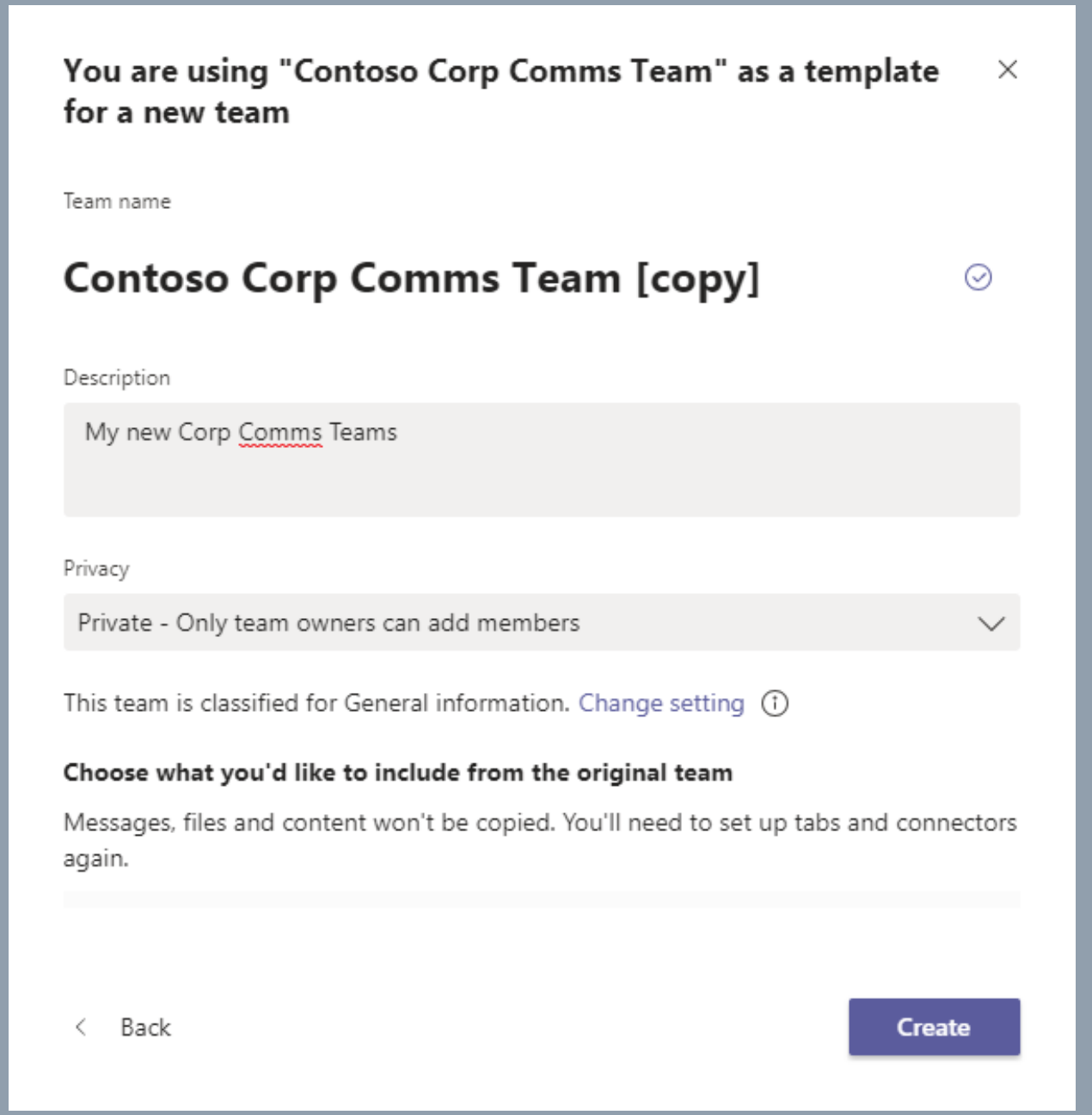
Create a Team



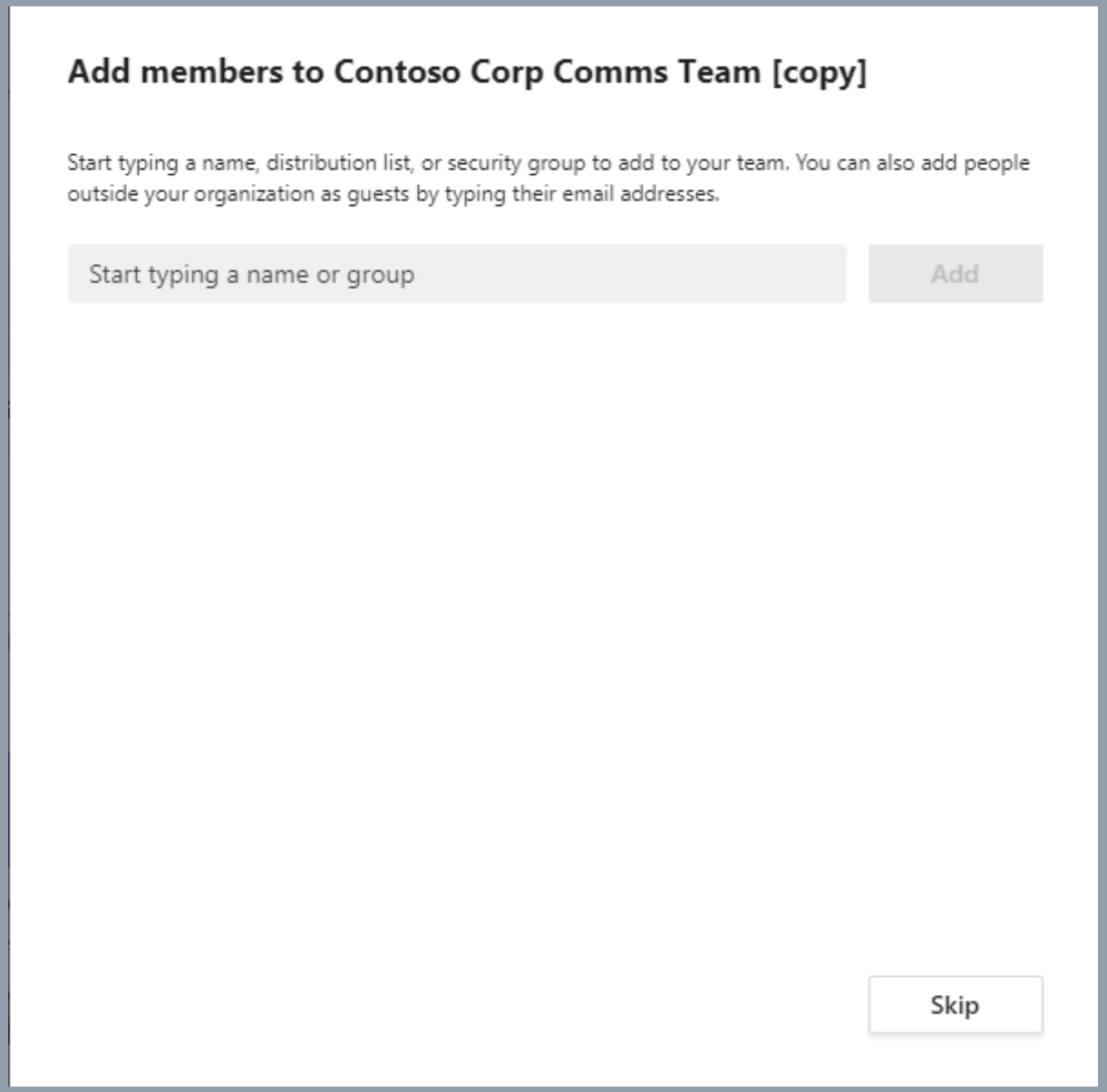
Create from an existing Office 365 group or team



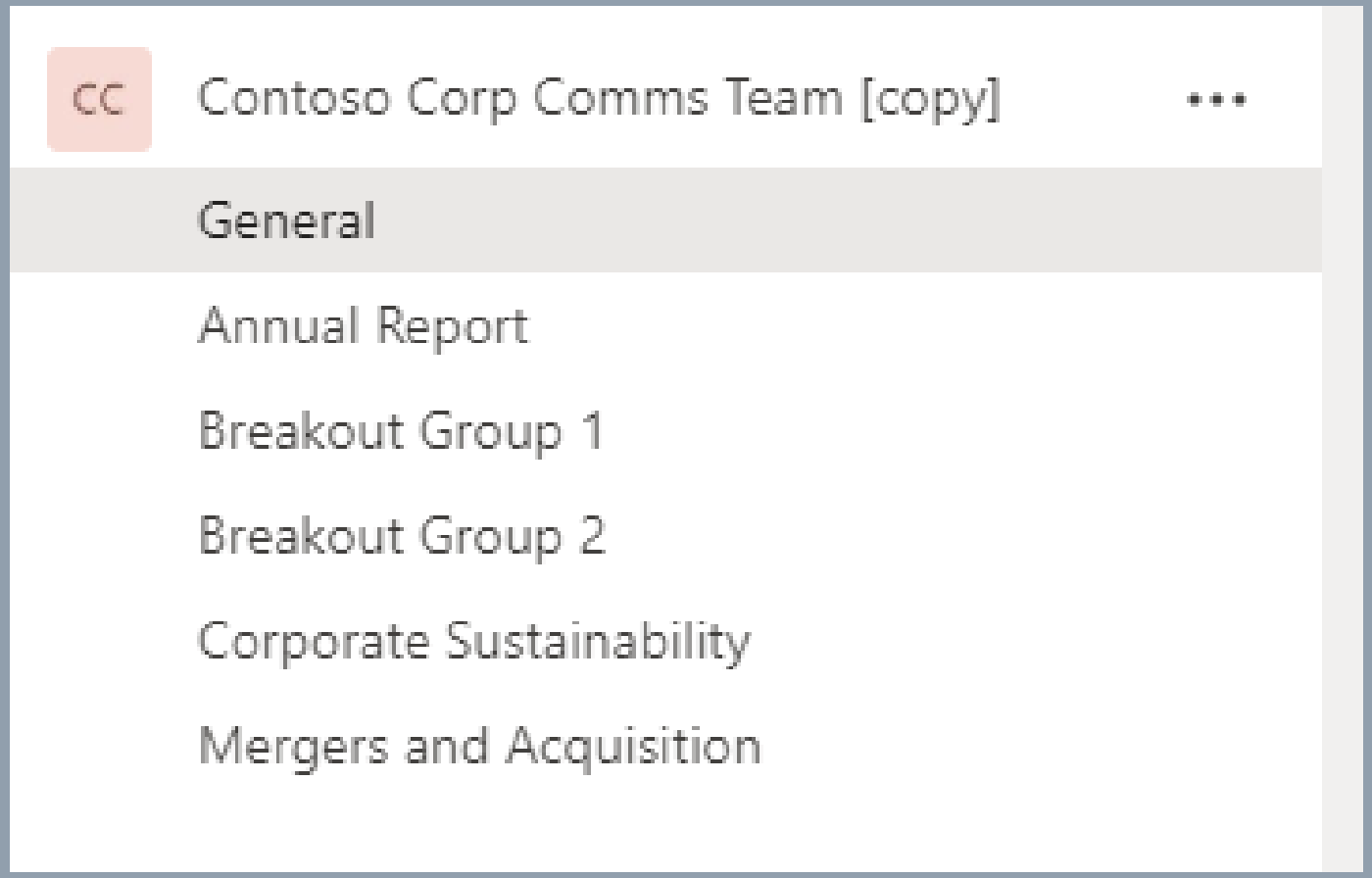
Let’s use existing Contoso Corp Comms Team as a template



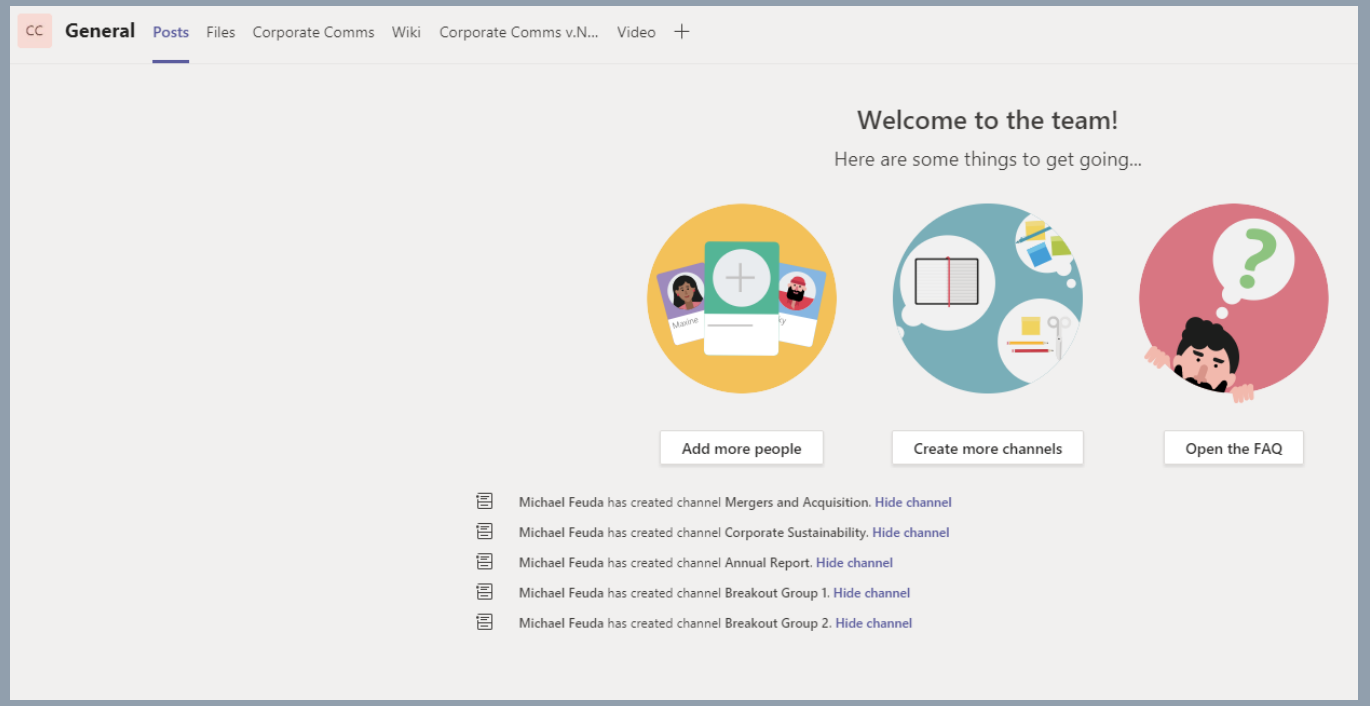
Add members


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.
Start typing a name or group
Add
Skip

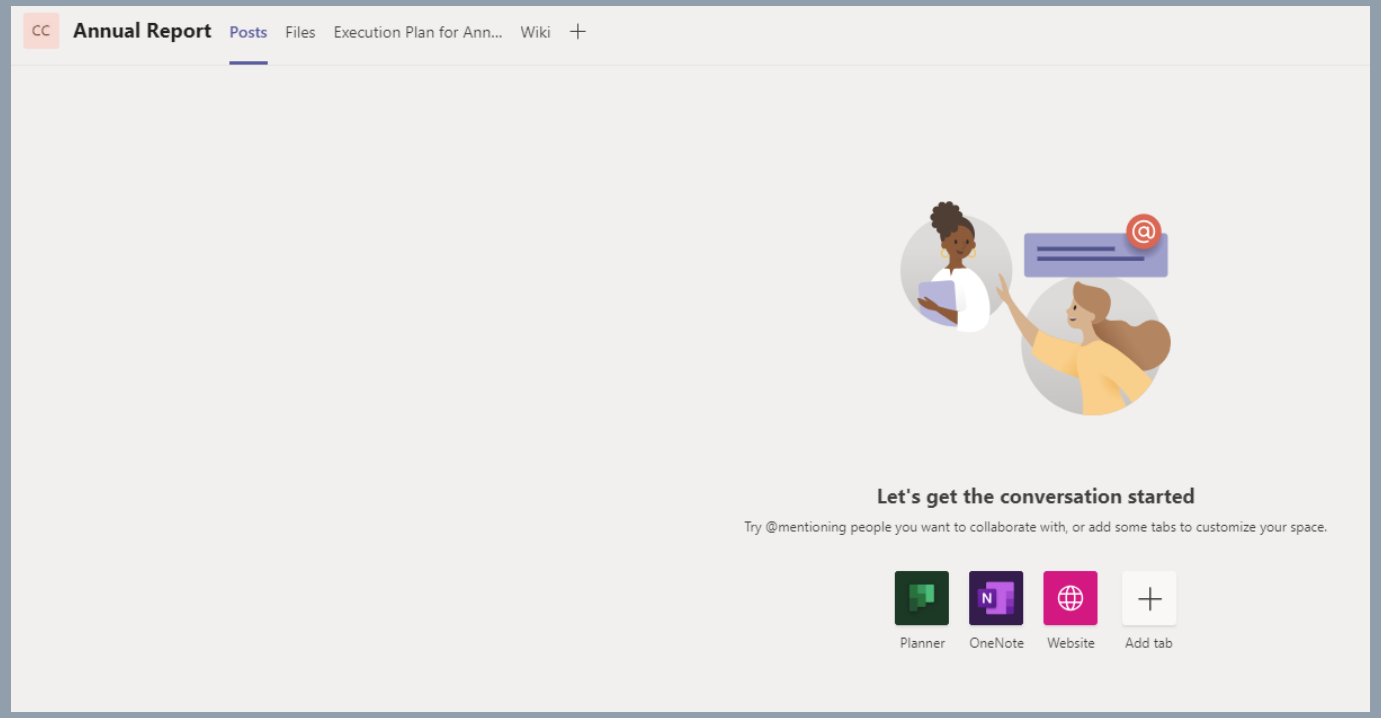
Channels are pre-defined



Tabs are predefined

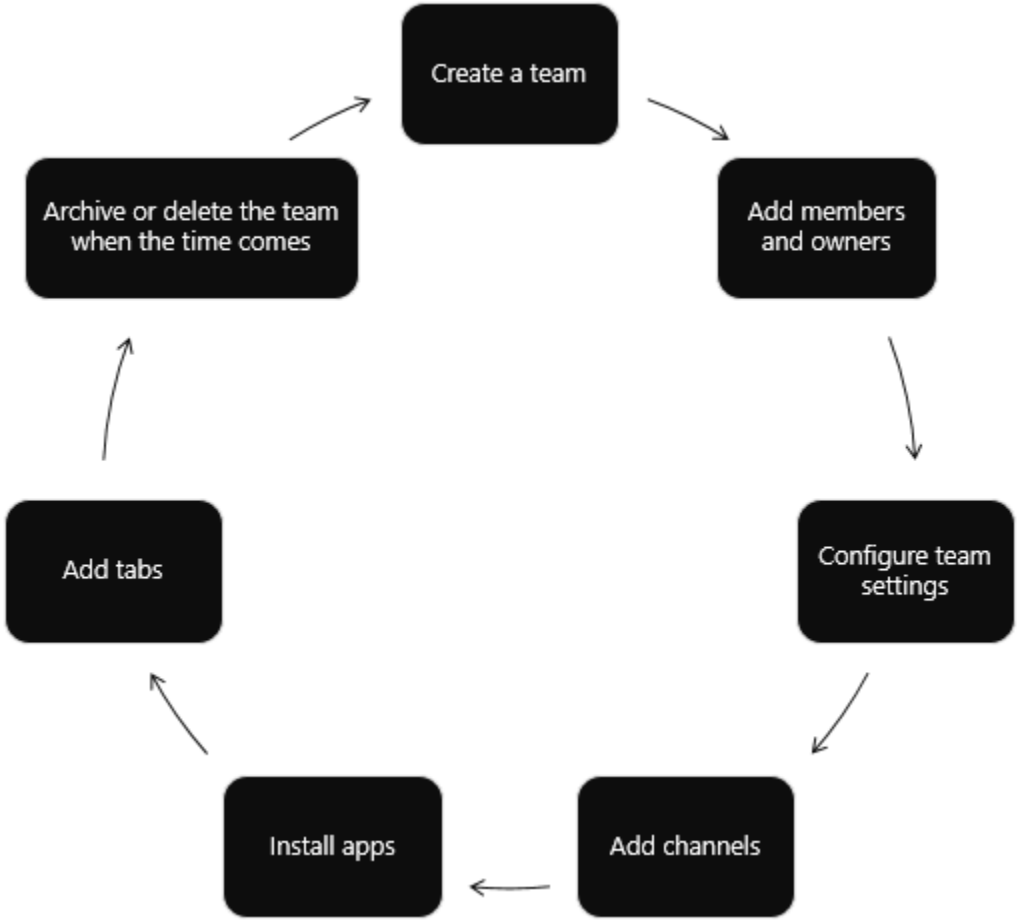


Conversations start fresh



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.

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DEMO

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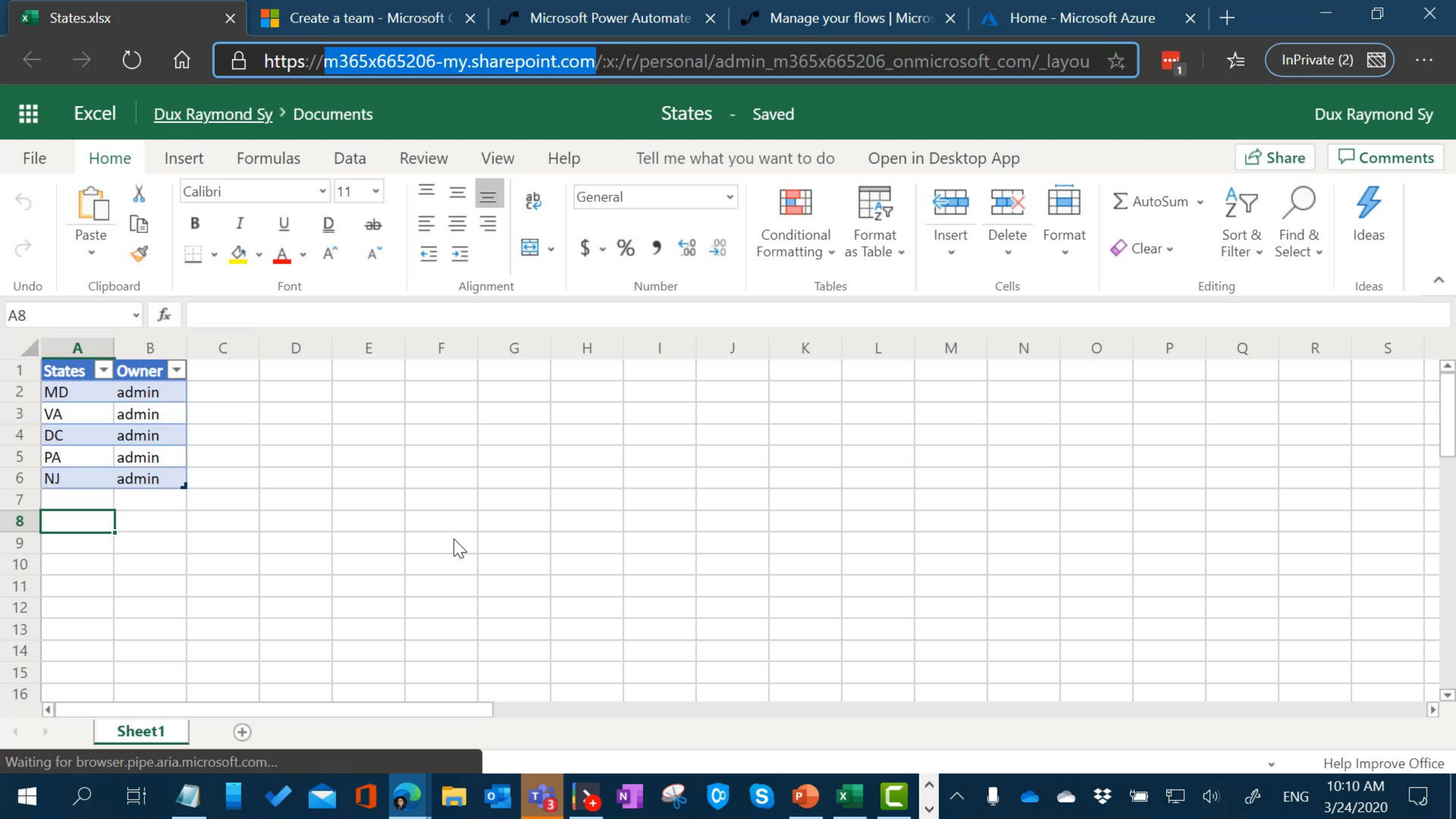
States.xlsx
Create a team - Microsoft
Microsoft Power Automate
Manage your flows | Micros
Home - Microsoft Azure
https://m365x665206-my.sharepoint.com/:x:/r/personal/admin_m365x665206_onmicrosoft_com/_layou
InPrivate (2)
Excel
Dux Raymond Sy › Documents
States - Saved
Dux Raymond Sy
File Home Insert Formulas Data Review View Help Tell me what you want to do Open in Desktop App
Share
Comments
Paste
Calibri
11
General
Conditional Formatting
Format as Table
Insert
Delete
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AutoSum
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Sort & Filter
Find & Select
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Tables
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MD admin
VA admin
DC admin
PA admin
NJ admin
Sheet1
Waiting for browser.pipe.aria.microsoft.com...
Help Improve Office
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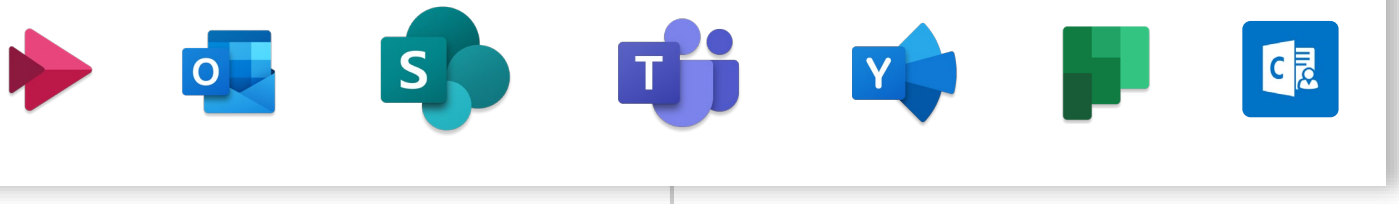
Advanced Solutions

Office 365 Groups Powers Microsoft 365 Collaboration

Membership service for Microsoft 365 teamwork apps

22+ Apps



Advanced sharing

Office 365 Groups

Partner ecosystem

atwork

AvePoint

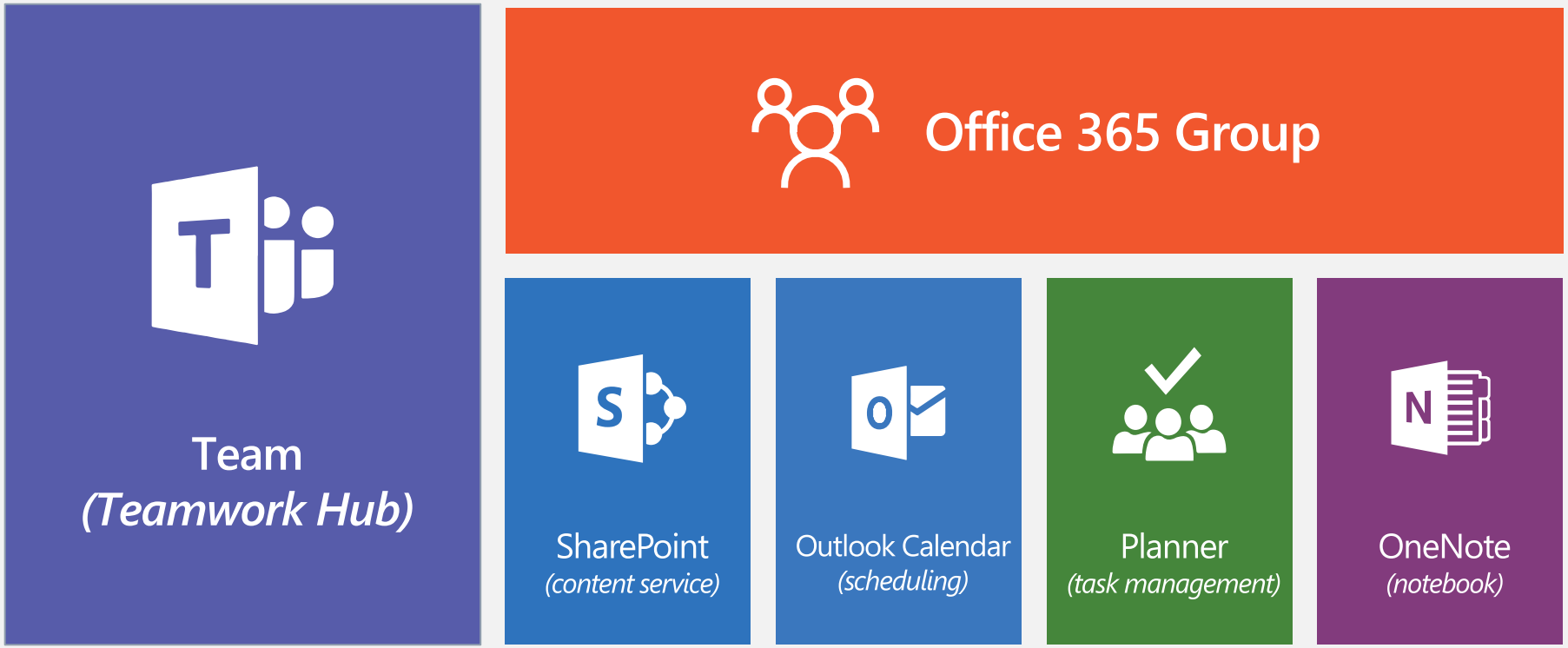
LawToolBox.com

ShareGate

Centrally managed, secured, and governed

Azure Active Directory

Example: When Creating a Team …



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Establish Governance Foundation

For collaborative workspaces, you need to govern:

How are Teams requested, approved and created	How do I ensure that policies are enforced?	How do I retain/expire/dispose of Teams as appropriate
Provisioning	*Management*	*Lifecycle*

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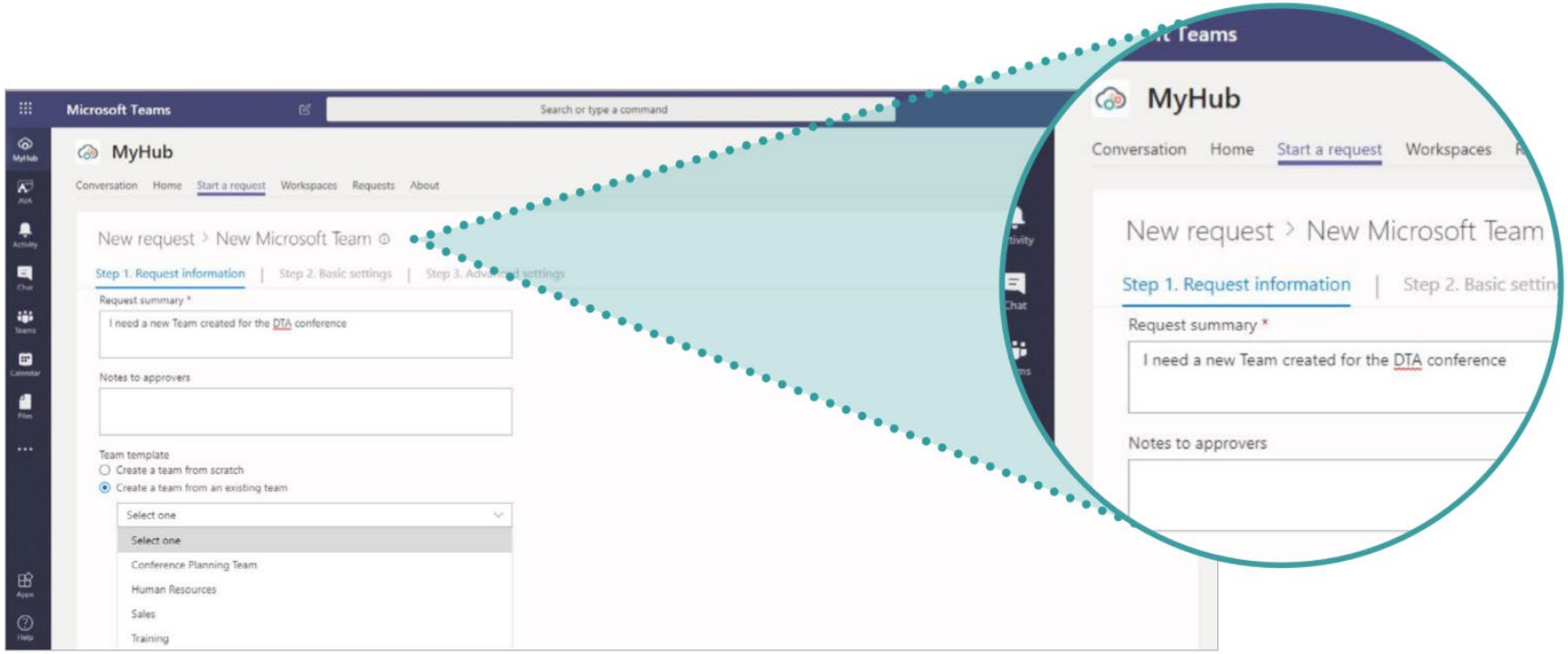
Make It Easy for People to Do the Right Thing

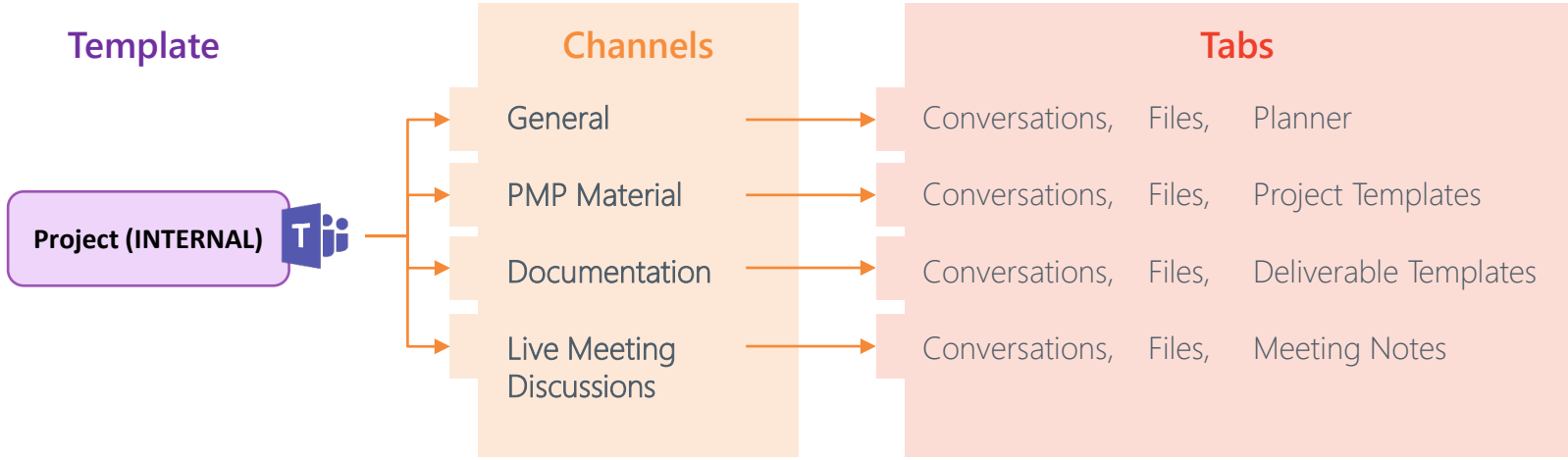
EXAMPLE

	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





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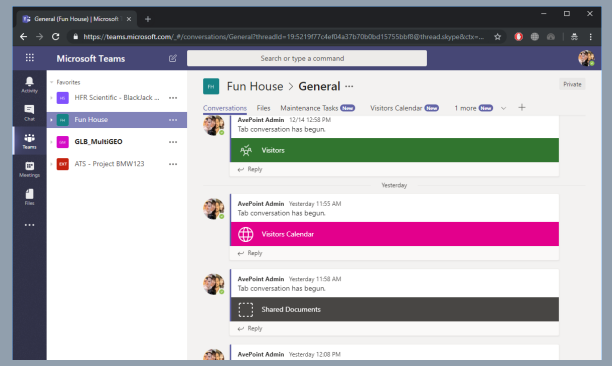
"Templates" are more than just channels and configuration.

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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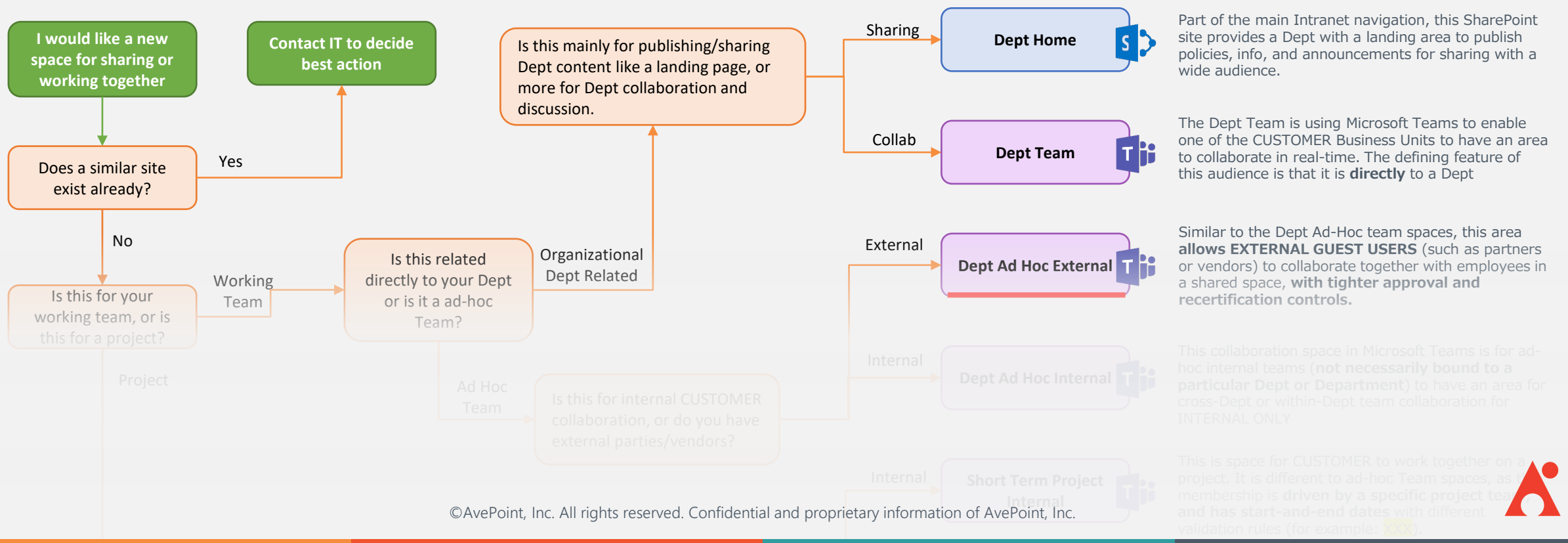
Decision Trees Map the Business to the Templates

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



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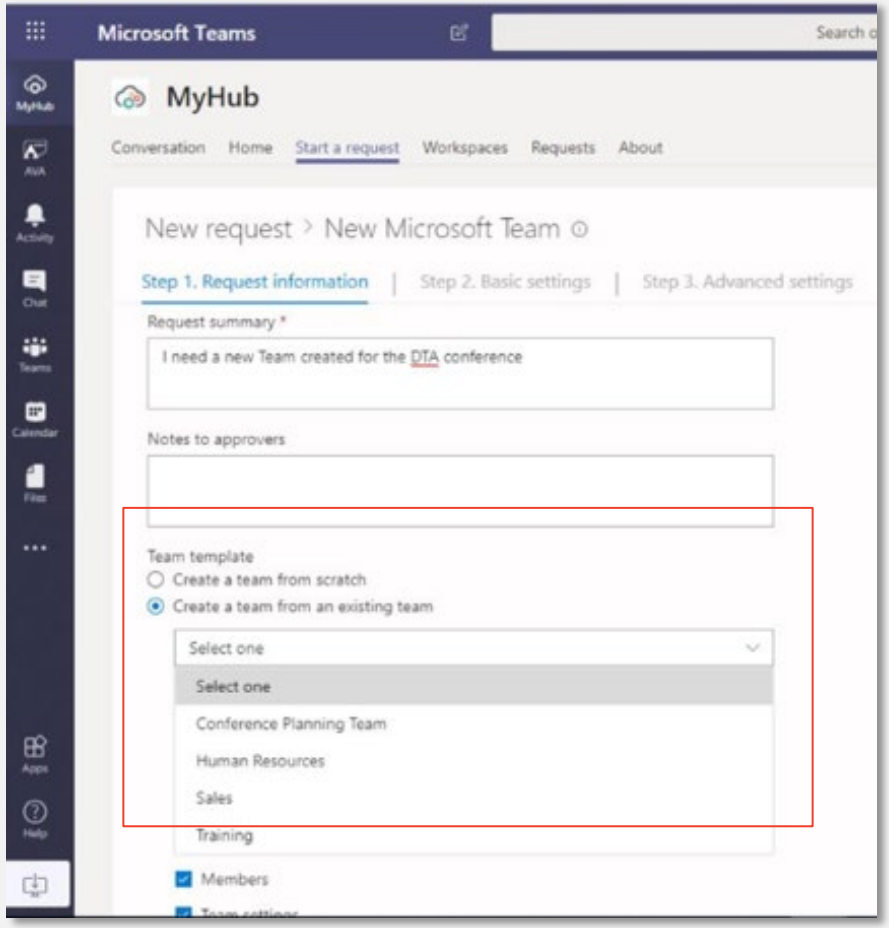
Example: Request and Track Workspaces



- 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**.

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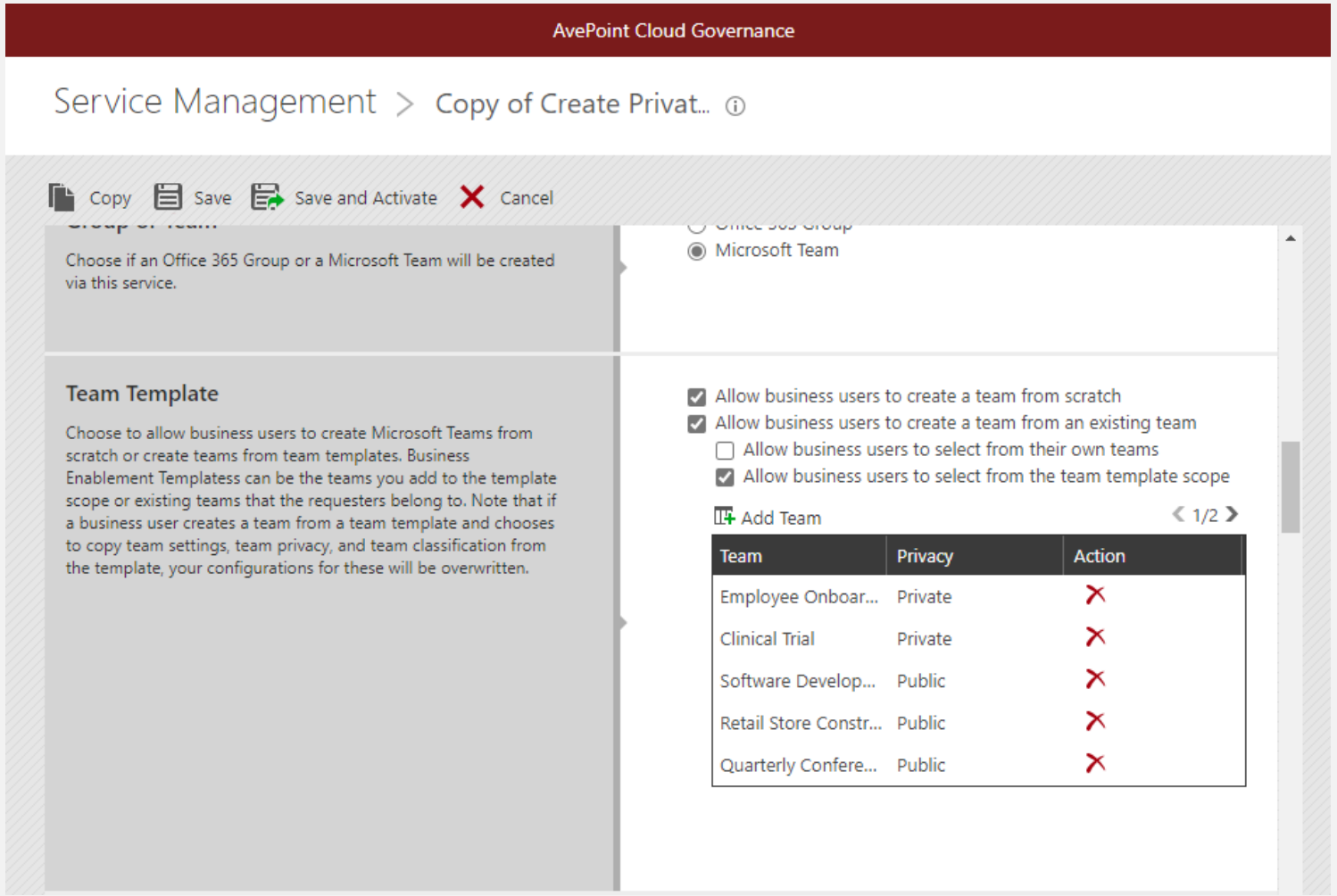
Example: Defining Template



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Bringing It Together

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

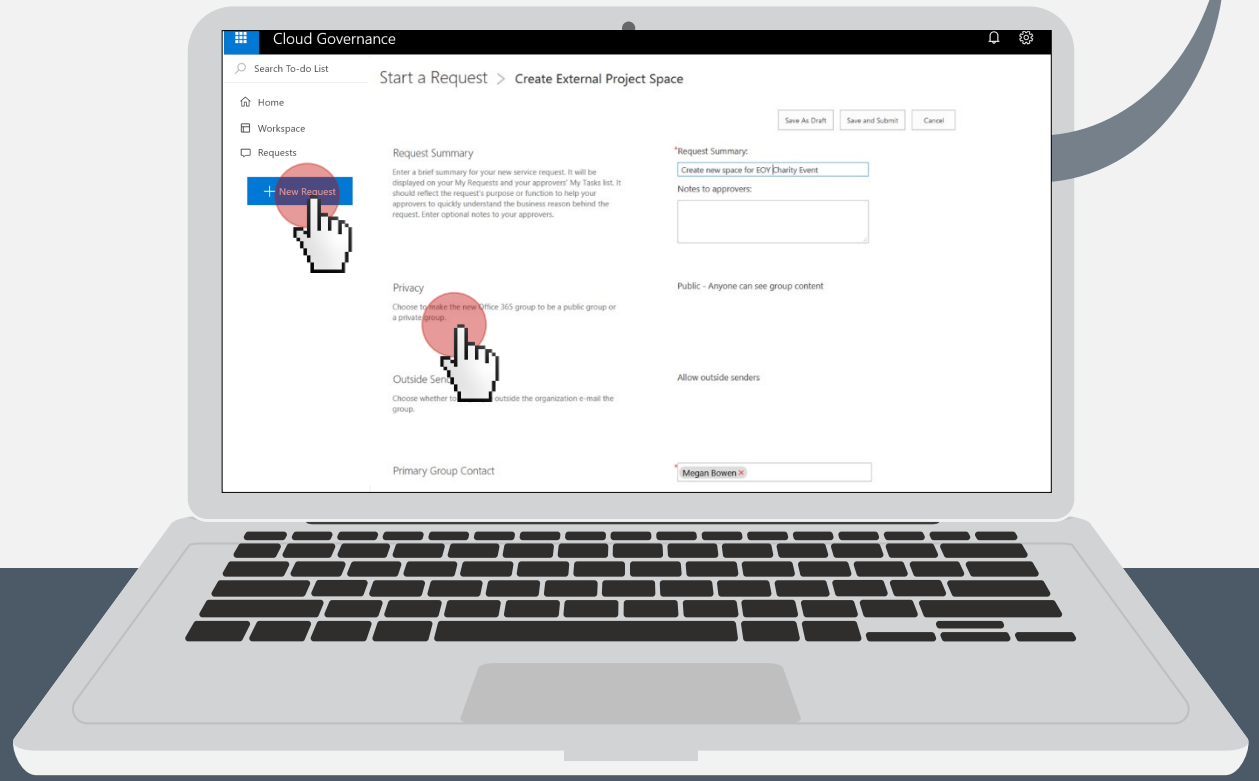
Backup: All
External Users: Yes
Recert: 6 Months
Reporting: Annual
+
Default Labels
Metadata Presets

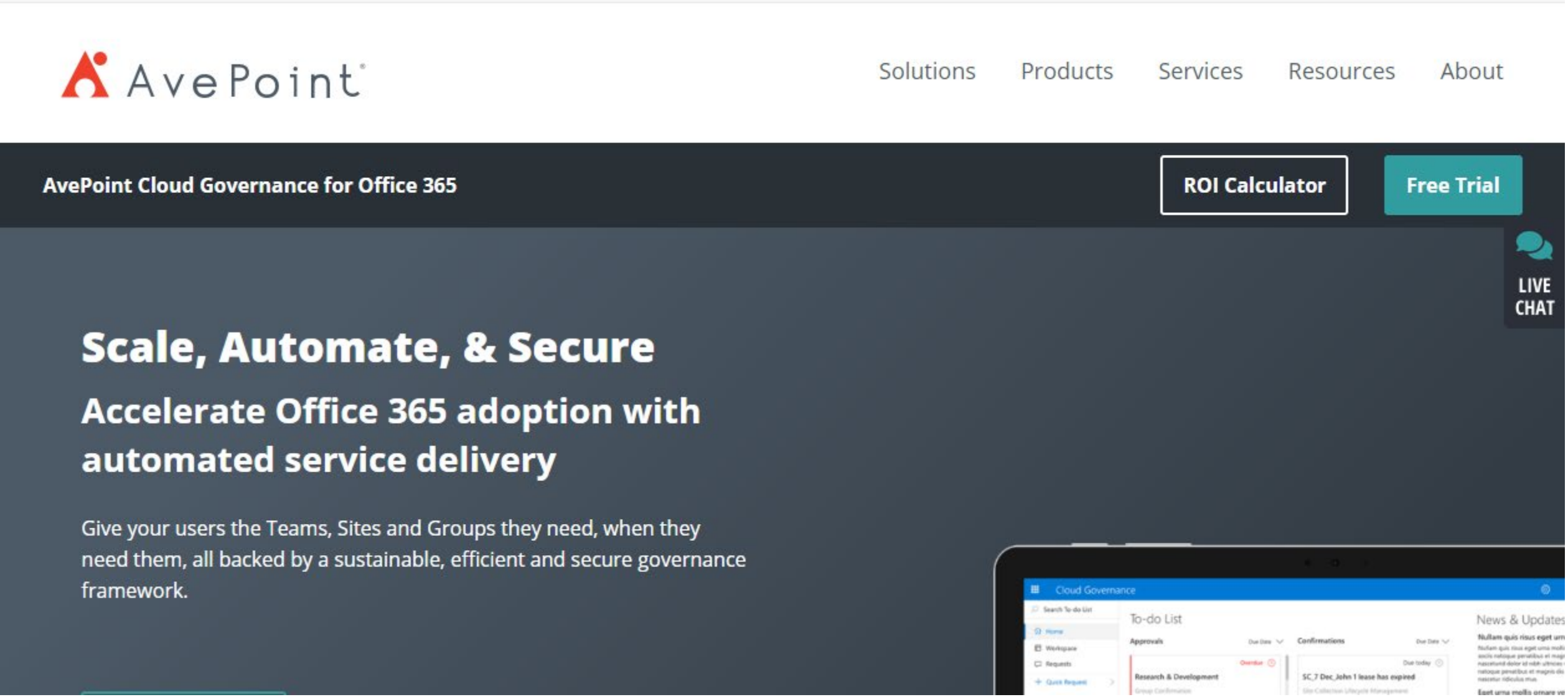
EOY Charity Event

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

LABELLED

TAGGED





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*

Prudential

AvePoint

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)

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Let's Connect

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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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