Microsoft SHAREPOINT WEEK 16–20 MAY

One Unmissable Week of Free Online SharePoint Learning

Bridging the gap: making the transition to Teams for SharePoint users

Making the most of SharePoint + Teams

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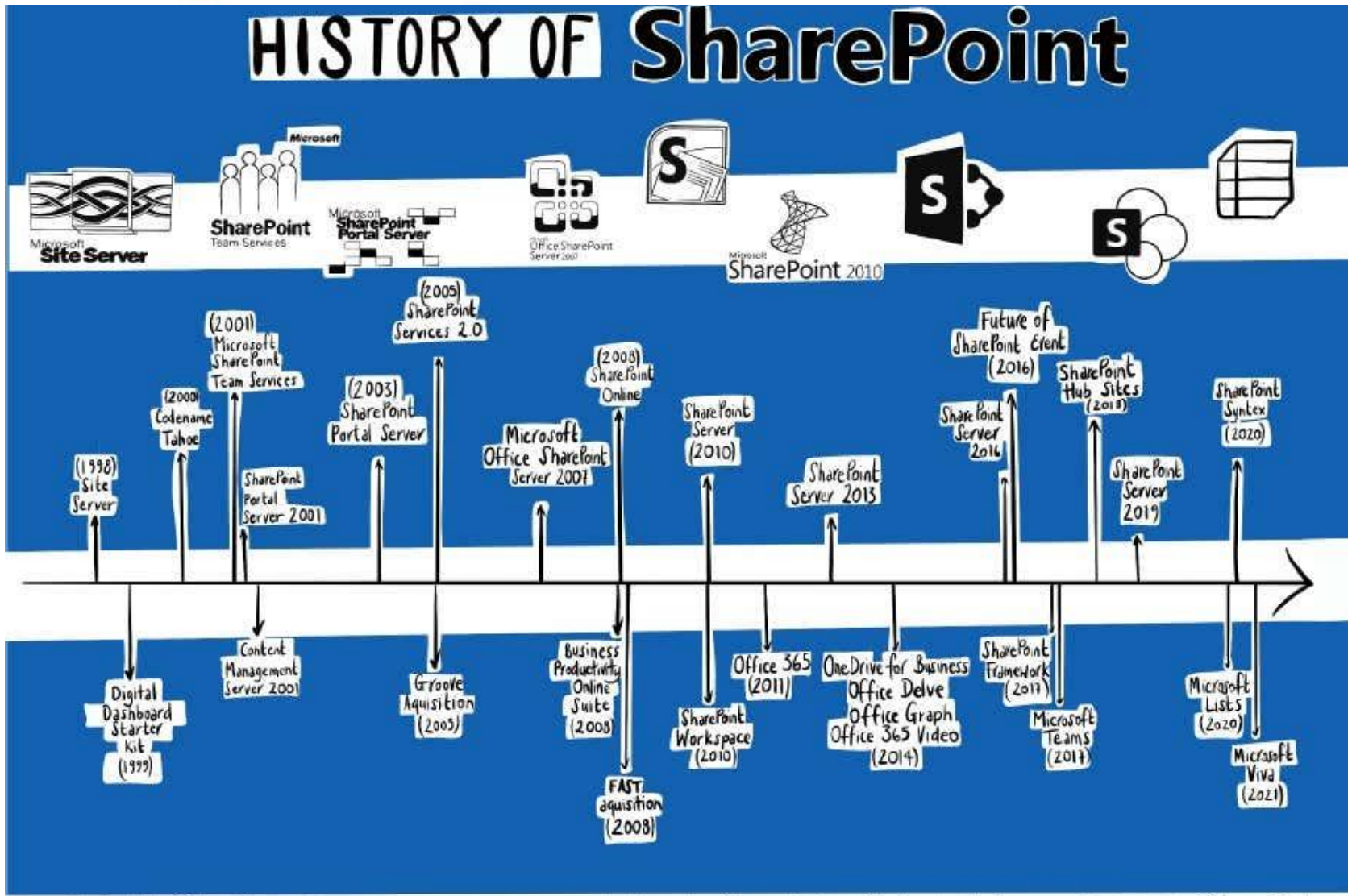
Microsoft® MVP Most Valuable Professional


HISTORY OF SharePoint
Microsoft Site Server
SharePoint Team Services
Microsoft SharePoint Portal Server
Office SharePoint Server 2007
Microsoft SharePoint 2010
(1998) Site Server
(2000) Codename Tahoe
(2001) Microsoft SharePoint Team Services
SharePoint Portal Server 2001
(2003) SharePoint Portal Server
(2005) SharePoint Services 2.0
Microsoft Office SharePoint Server 2007
(2008) SharePoint Online
SharePoint Server (2010)
SharePoint Server 2013
Future of SharePoint Event (2016)
SharePoint Server 2016
SharePoint Hub Sites (2018)
SharePoint Server 2019
SharePoint Syntex (2020)
Digital Dashboard Starter Kit (1999)
Content Management Server 2001
Groove Aquisition (2005)
Business Productivity Online Suite (2008)
FAST aquisition (2008)
SharePoint Workspace (2010)
Office 365 (2011)
OneDrive for Business
Office Delve
Office Graph
Office 365 Video (2014)
SharePoint Framework (2017)
Microsoft Teams (2017)
Microsoft Lists (2020)
Microsoft Viva (2021)
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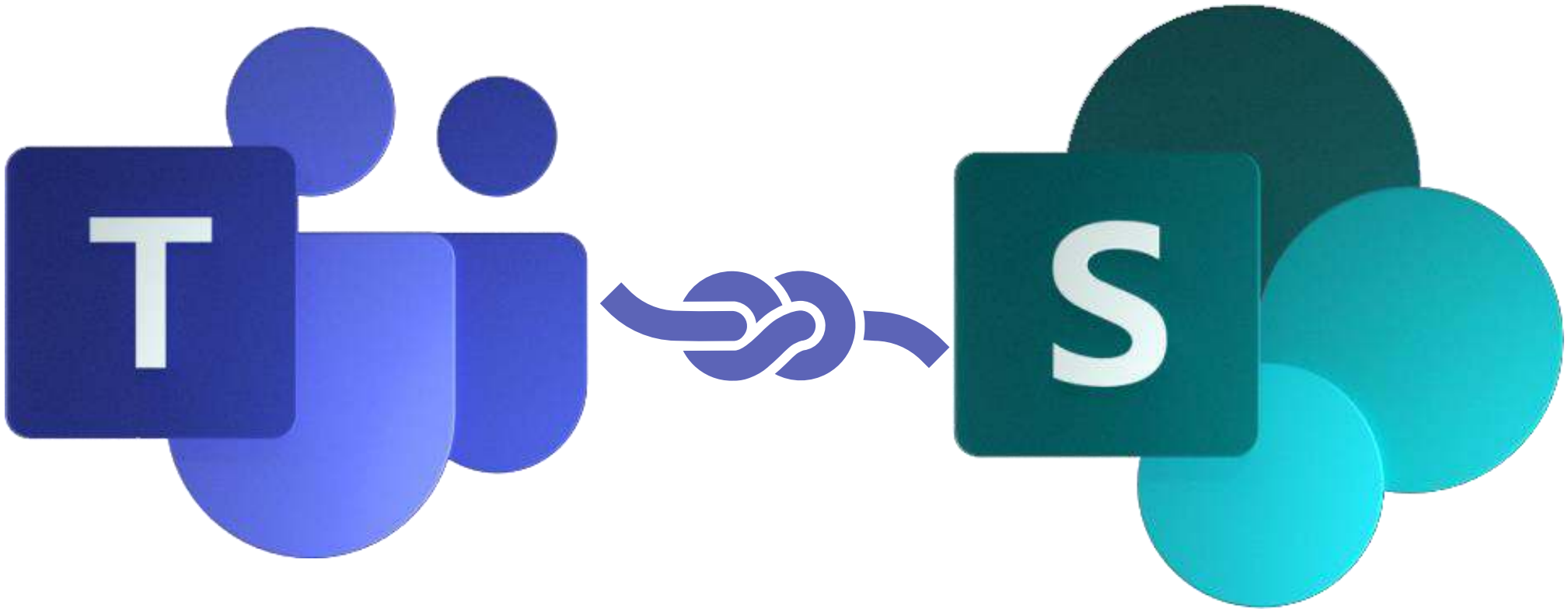
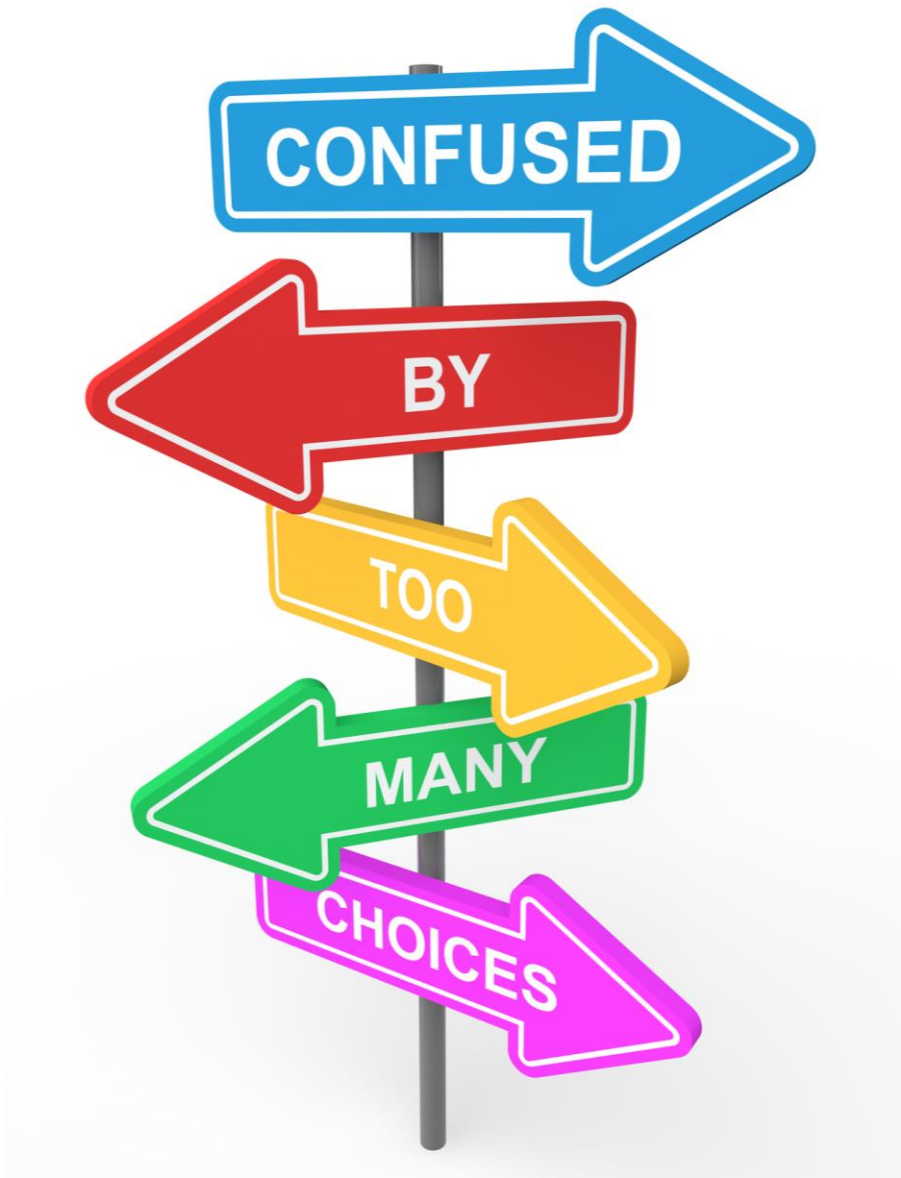
Written by Susan Hanley & Mark Kashman
Illustrated by Rebecca Jackson

2020



All in one
It's All Here
one-stop shop
all you need
get it All
Full Service
Battle
Everything


CONFUSED
BY
TOO
MANY
CHOICES

Finding and collaborating may now be harder

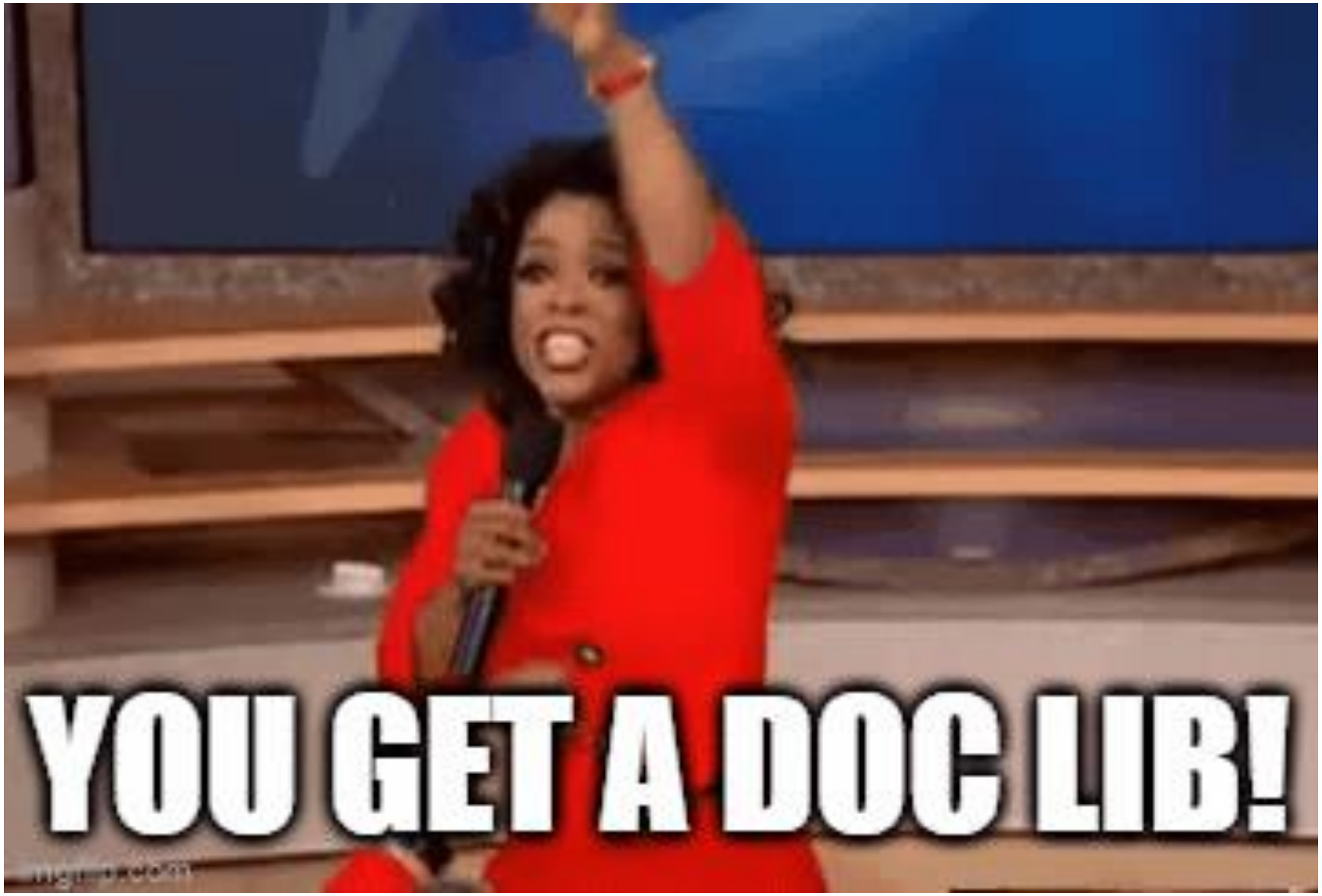
- Where do I find my file? SharePoint or Teams?
- Where do I store my file?
- Where IS my file?

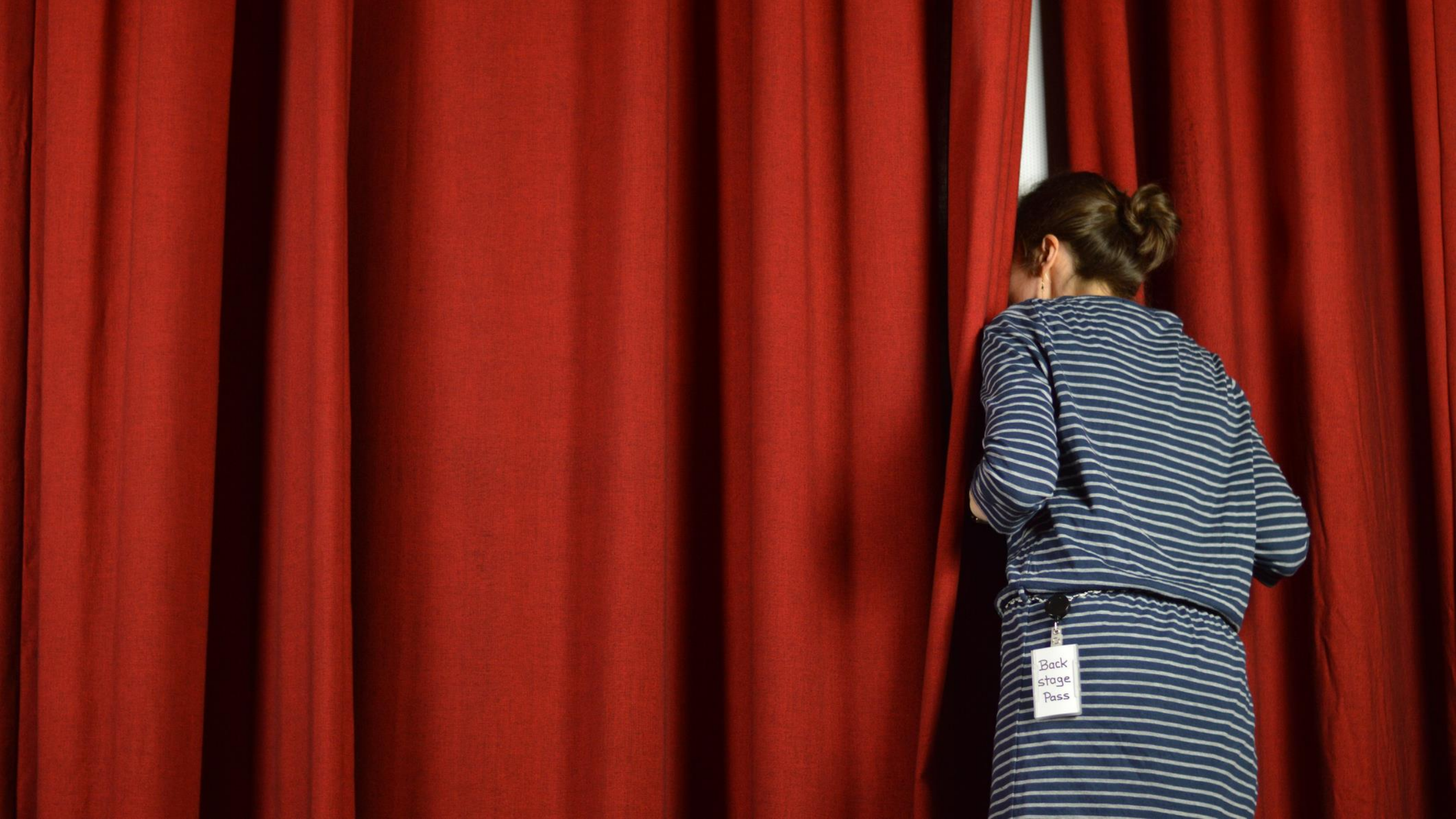
Topics

- Explaining the Teams-SharePoint connection
- Planning your Team channels and content migration
- Getting started from modern team sites in SharePoint online
- Getting started from classic team sites in SharePoint online
- Getting started from SharePoint on prem
- Understanding Teams vs. SharePoint concepts
  - Channels
  - Meetings
- Helping users with the transition

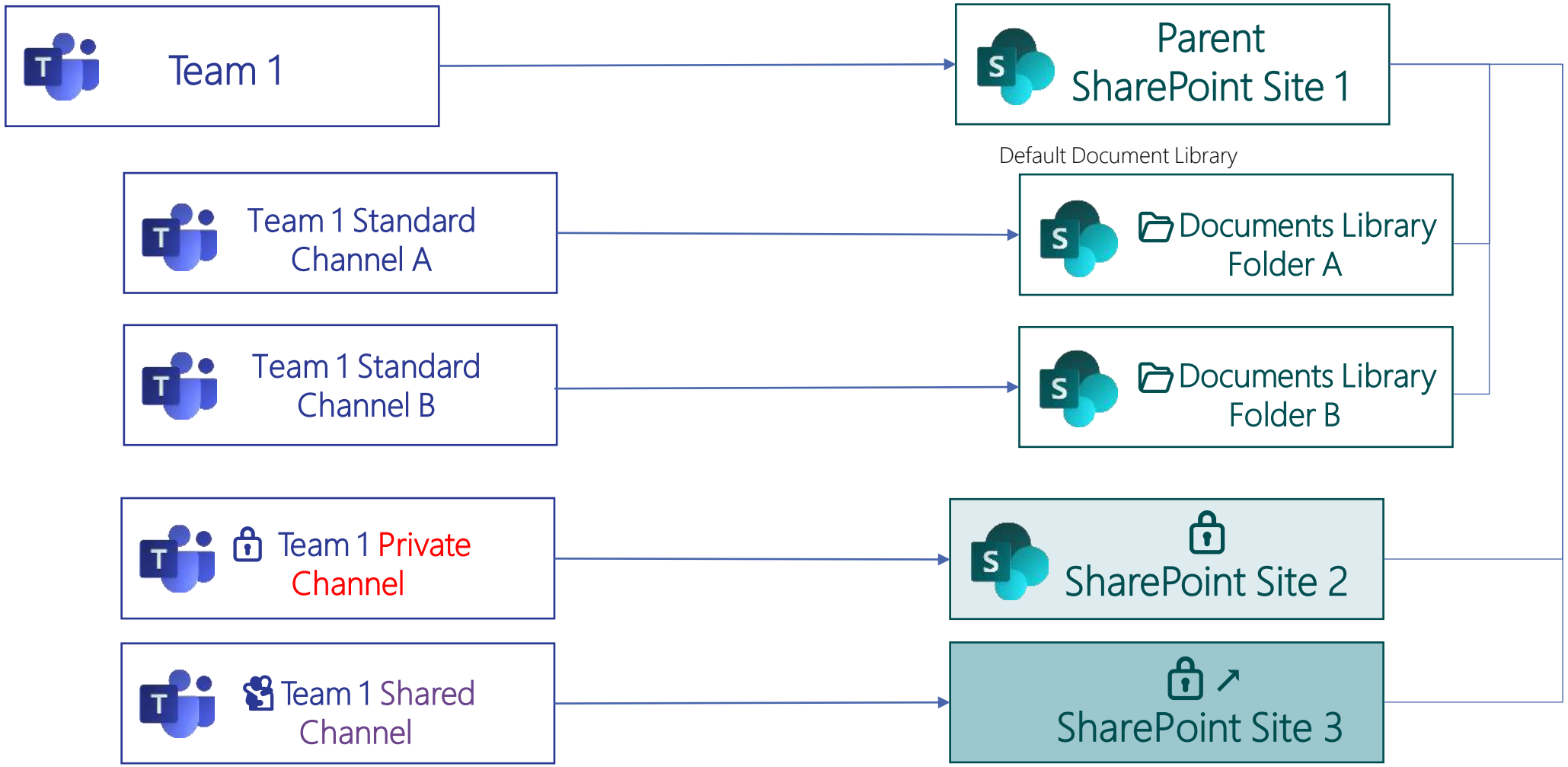
Teams is not a *container* for files

Teams Files are stored in SharePoint

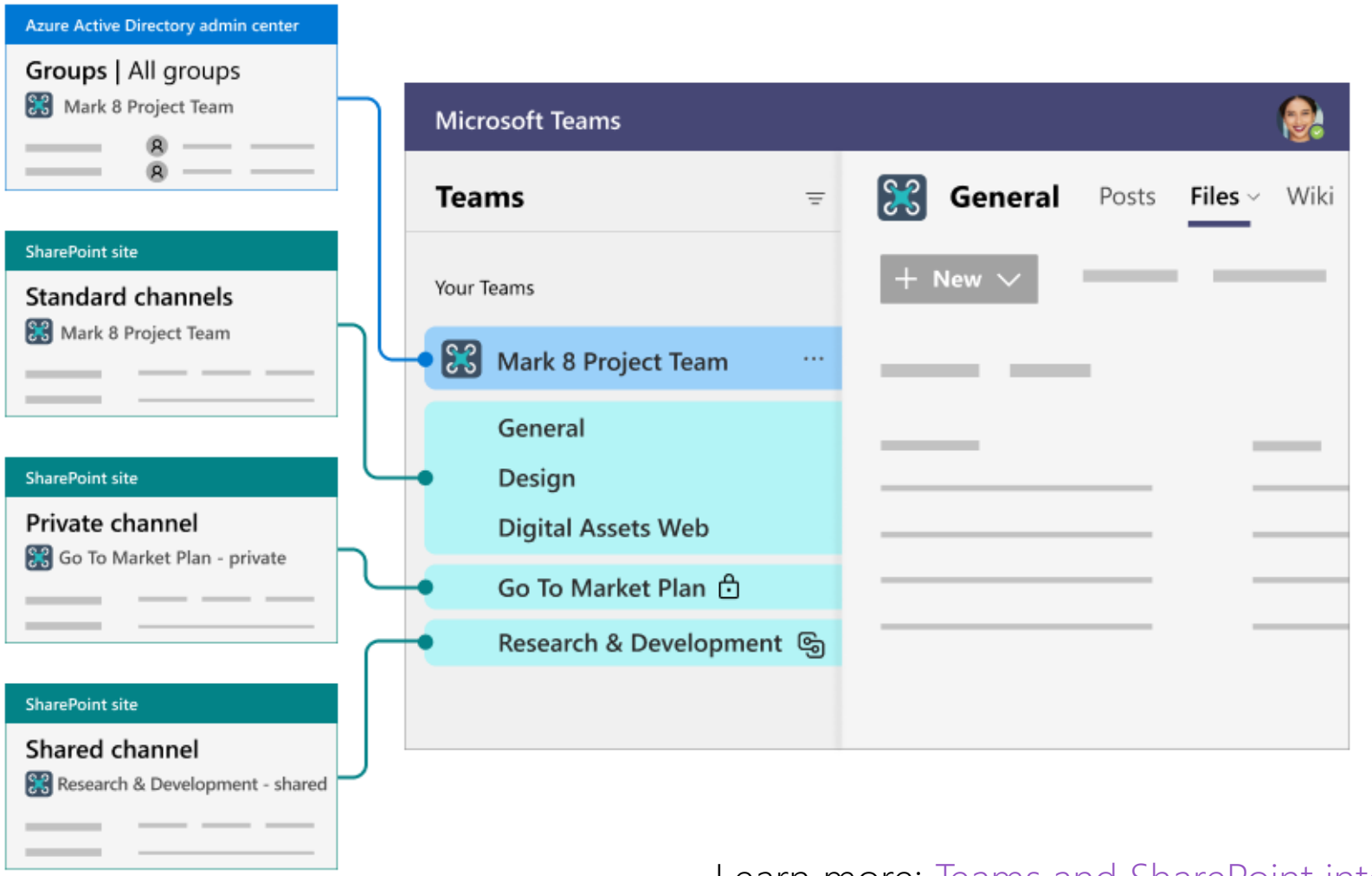



Back
stage
Pass

Teams channels = SharePoint folders (ish)



Teams channels in Teams



Learn more: [Teams and SharePoint integration - SharePoint in Microsoft 365 | Microsoft Docs]

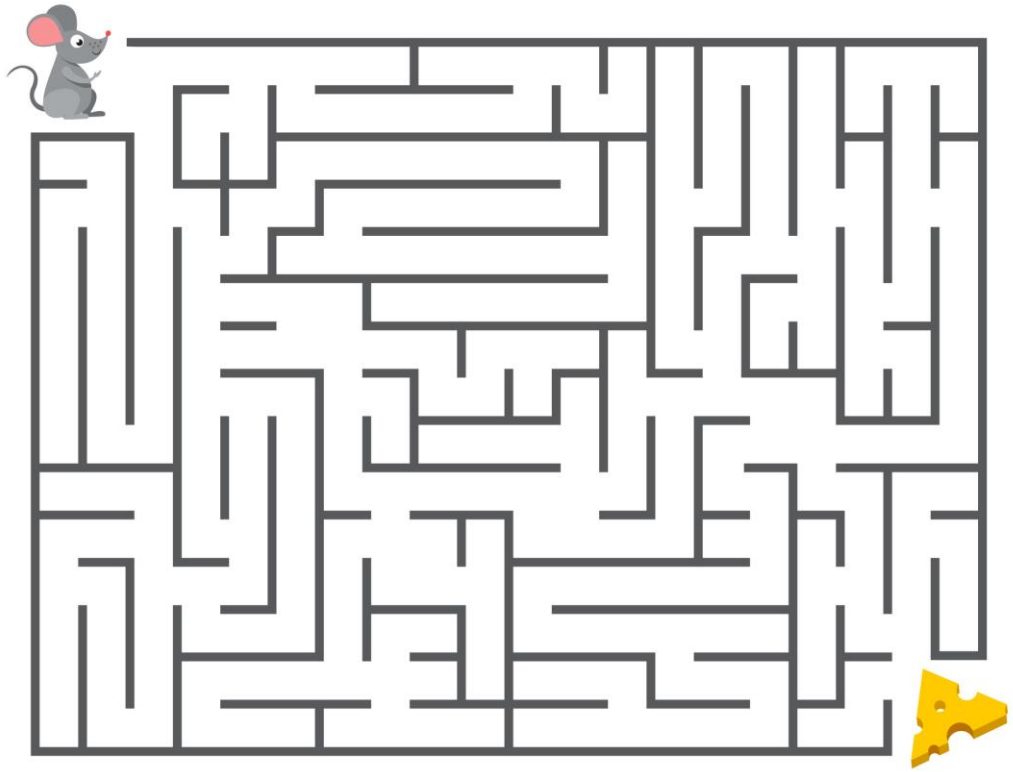
Building blocks in Microsoft 365

Team sites	Communication sites	Hubs
Department	Initiative, campaign or event	Family of related sites
Team	Function or organization	Share common navigation
Project	Community of practice or interest	Roll up news
Extranet (Partner, Customer)	Training and policies	See site activity for the family
Committee (Planning, Executive)	Updates and reports	Search scope
Collaborate	Communicate	Connect

You can start your SharePoint to Teams journey from different places

No matter where you start, adding a Team to your site will change your site and perspective!

- People are *using* the site – you will be moving their cheese!
- The front door of SharePoint is a page – the front door of a Team is chat
- Your existing folder structure is going to get disrupted – Teams is going to add a folder called **General** to your default Document Library
- If you have more than one library that you are using for files, you will need to figure out how to showcase them in Teams
- Your current folders may or may not align with Teams channels



Think about some initial channels

- Think about the primary topics for your project or work group
- Don't try to cover every possible topic that you could possibly talk about - just the major categories of work – or documents
- Discuss the primary categories with your team members and get a consensus on the label for the topic
- Channels in Teams are always displayed in alphabetical order (Use leading zeros if you use numbers!! 01, 02, 03, etc.)
- Use the General channel for announcements and topics that don't fit for other channels.
  - Share an overview of what the team wants to achieve such as a **project charter** or **who's who in the team**
  - New team member **onboarding**
  - Use it for announcements or configure the **SharePoint News** connector to post your modern status reports to this channel
  - **Meeting notes (OneNote)**

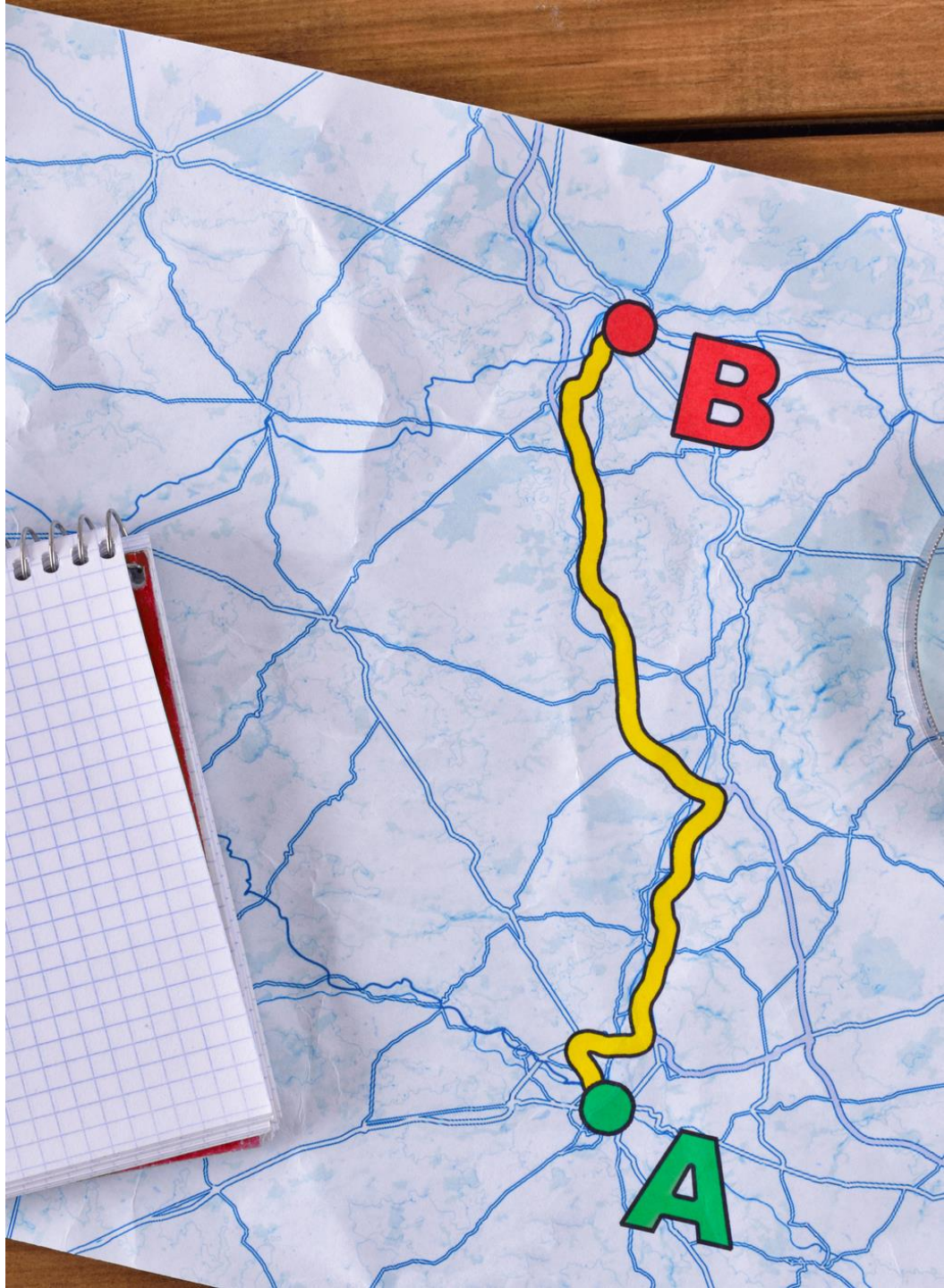
Review your current files – especially in the default Documents library

- Can you clean up what you aren't using?
- Do you have any "main" topics represented in your folder structure? (These may be good candidates for channels.)
  - Are the folders based on the workstreams in your project?
  - Do they map to topics about which you might have conversations?
  - Do you have a folder for each team meeting? If so, consider creating a channel called Meetings and a sub-folder for each meeting date. Add your OneNote for meeting notes as a tab.

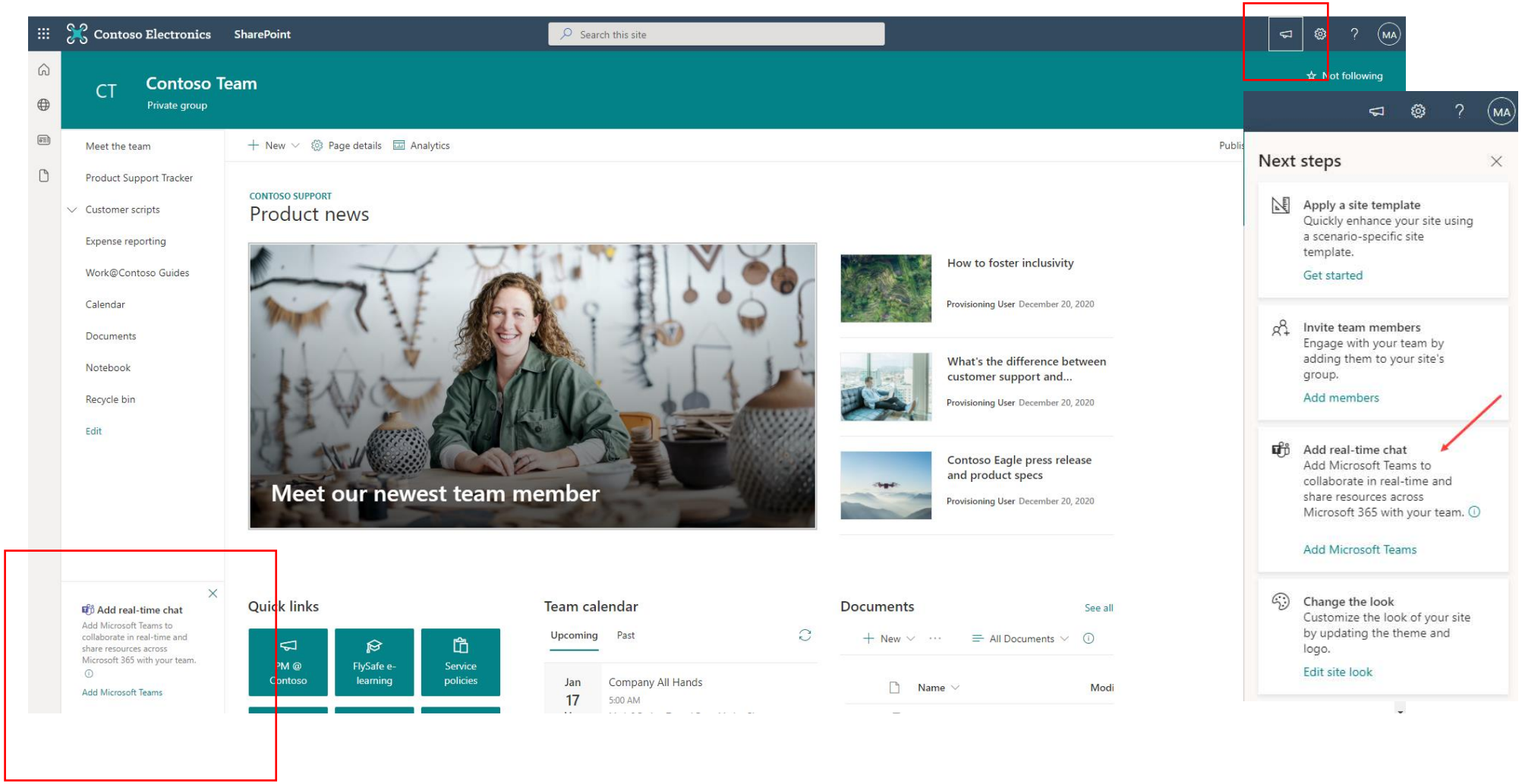
Plan how you will map existing content to your channels

- Start thinking about how you might map your existing content to your proposed channels
- Make sure all folders in your Documents library are mapped to a channel. (Don't use non-channel folders.)
- Do you want to move inactive files that won't be mapped to a channel to a new document library?
  - Tip: Add this library as a Tab in your General channel – use the SharePoint app

SharePoint

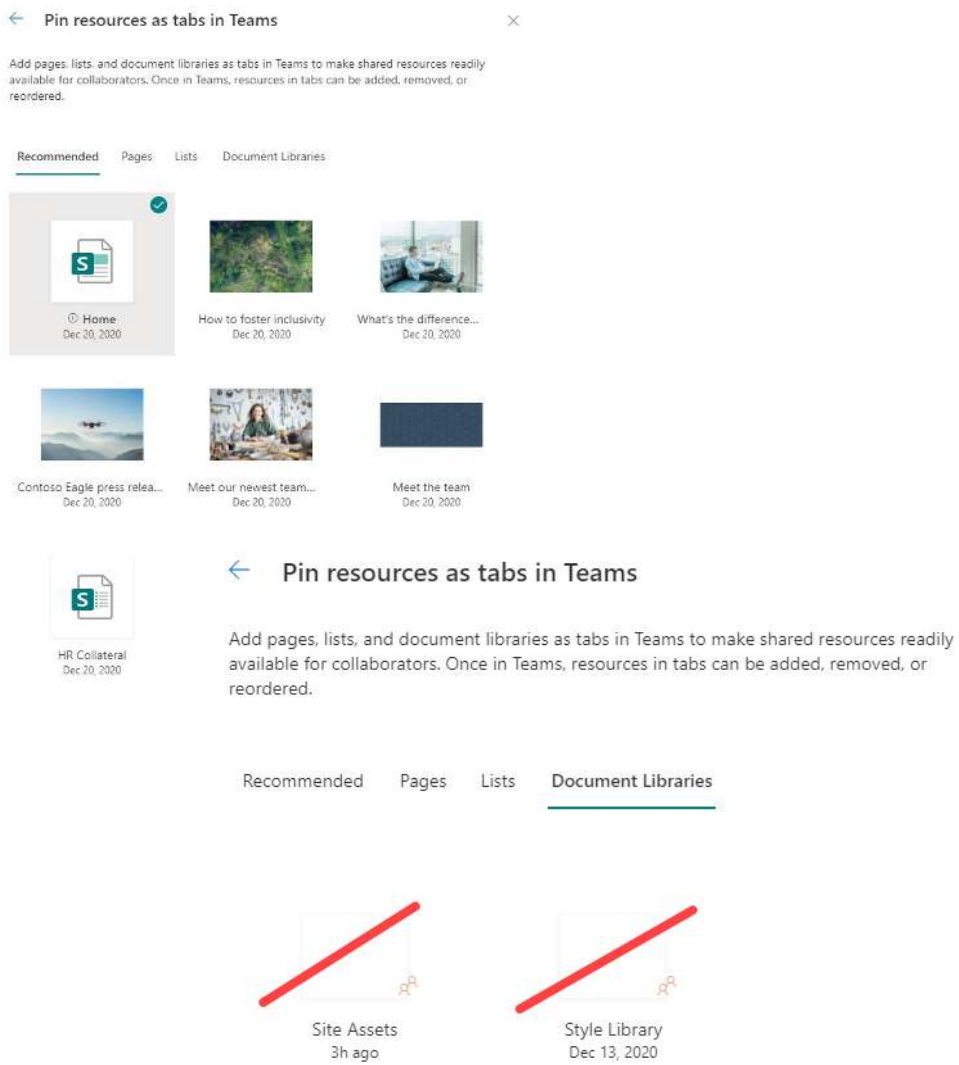


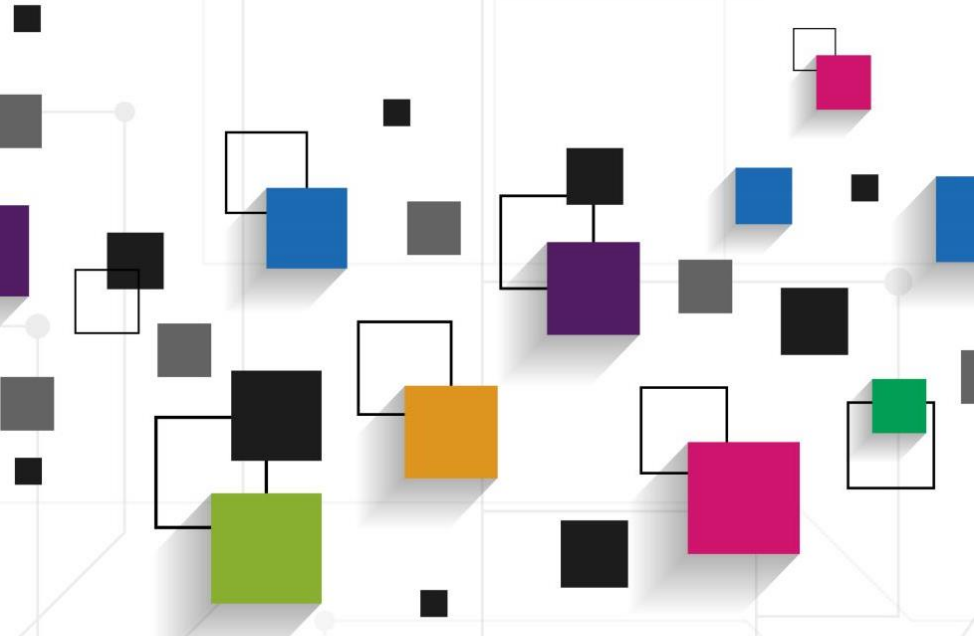
In the cloud with modern team sites? Teamify!



What happens when you Team-ify?

- The wizard prompts the Site Owner to make some decisions – but they probably won't know how to make them unless they have done some planning first
- Resources recommended to pin as tabs (they will go to the General channel)
  - Home page
  - Lists
  - Do not pin the Style Library or Site Assets
  - Possibly YES to other libraries





In the cloud with “classic” team sites? Groupify, review, then Teamify

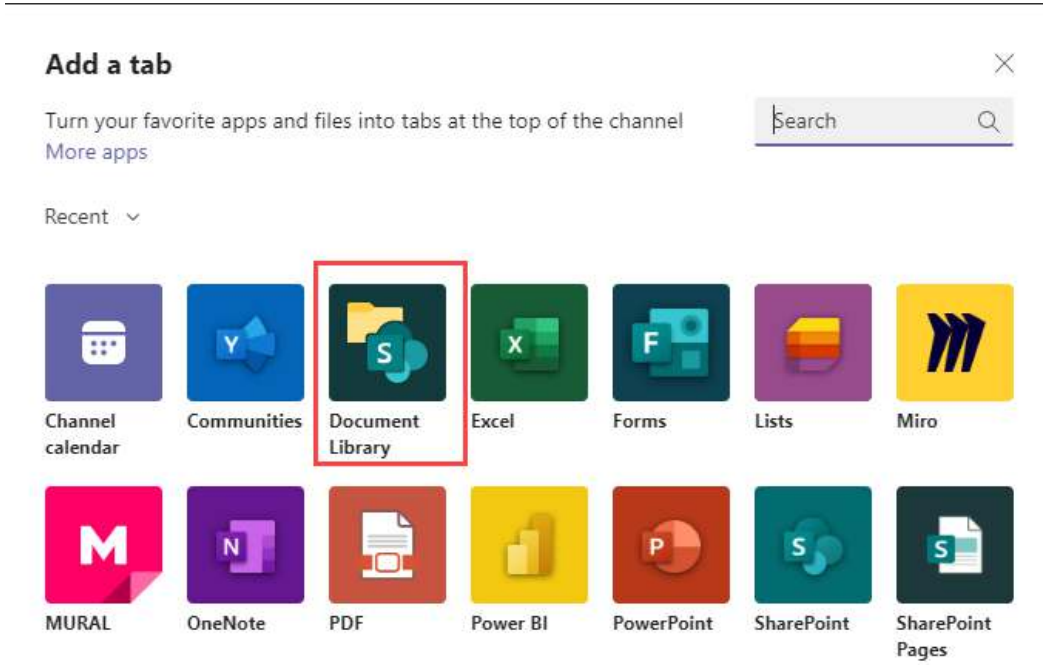
- Connect to new Microsoft 365 group - keep your content, permissions, and customizations intact without having to migrate content
  - A new Microsoft 365 group is created, group is connected to your site collection
  - A new modern home page is created on your site and set as site home page
  - Group’s Owners are now the site collection administrators
  - Group’s Owners are added to your site's Owners group
  - Group’s Members are added to your site's Members group

Learn more: Connect to a Microsoft 365 group | Microsoft Docs

On prem? Flatten, then migrate!

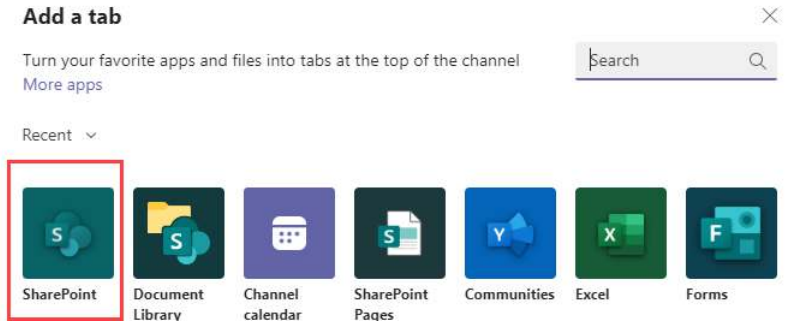
Moving content to your new channels

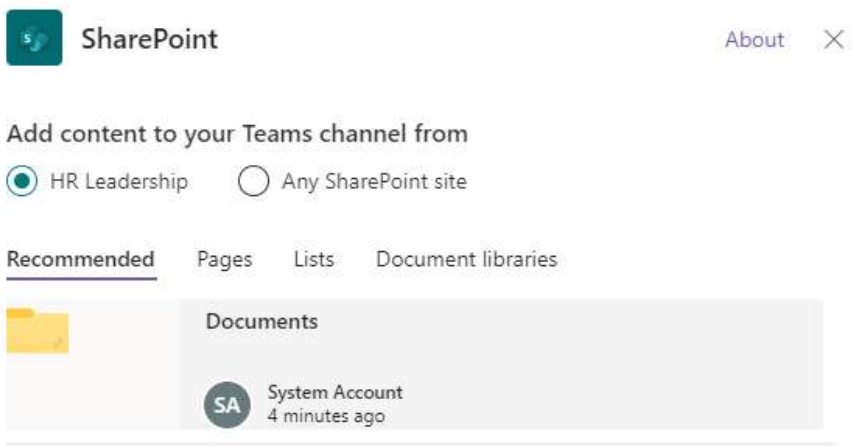
- **Start by creating the channels you need in Teams** 💡
  - This will create "Team-ified" folders in SharePoint
  - Then go to the SharePoint site and move existing content to the relevant Team-ified folders
- What about the content that doesn't map to a channel?
  - Consider creating a new document library and adding the library as a tab
  - Note: Add a library from any site you have access to



Other set-up steps

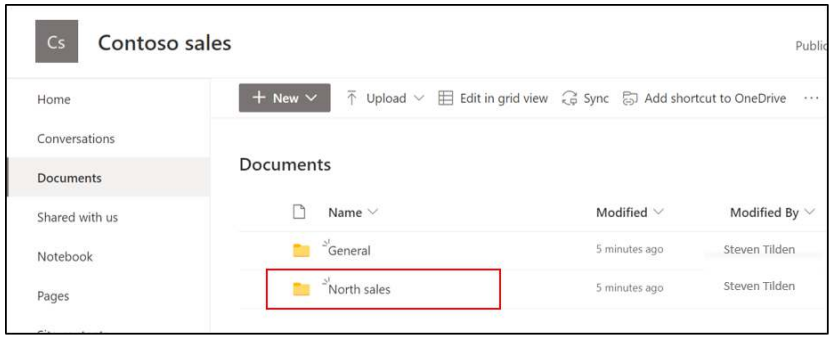
- Add the home page as a tab in the General channel. Also consider:
  - News
  - Who's who
  - Welcome to the Team
- Add Lists as tabs in appropriate channels
  - Make sure ALL lists are added as tabs!
- Teams is now managing the folders in the default Documents library – renaming starts in Teams, not SharePoint (May-June 2022)



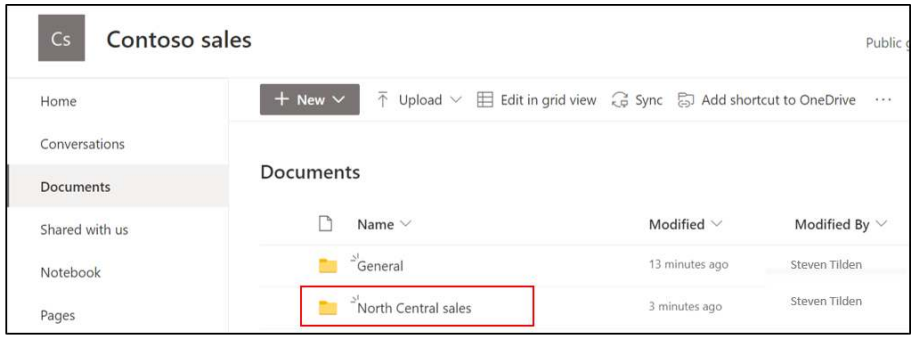


When you change the name of a channel in Teams …

- Standard channels – corresponding folder in SharePoint is renamed
- Private channels – corresponding folder in SharePoint is renamed
- Teams channels that were renamed prior to the feature rollout (May – June 2022) – no change in experience
  - When a legacy channel is renamed after the release, it will simultaneously rename the corresponding SharePoint folder
- If you were syncing to OneDrive:
  - Name change will only be updated if you are syncing the entire library
  - When only the channel folder is sync'ed, the new name is not reflected in the OneDrive sync client



Prior



Now

Do I need a new Team or a Channel in a Team?

Scenario	Recommended Approach
I am working on a new initiative with different people.	• New Team

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I am working on a new initiative with the same people.	• New Team - if you have multiple topics to discuss for the initiative • Channel in the same team if there is only one topic

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I want to focus conversations or files within a project or work group on a specific topic - but everyone on the team has access to the content.	• New Channel in the same Team

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I want to focus conversations or files within a project or work group on a specific topic - but everyone on the team has access to the content.	• New Channel in the same Team
I want to create a private space within an existing Team for just the Team Leadership (or other **subset of the Team membership**) to collaborate privately.	• Private Channel in the same Team • If you have multiple topics to discuss, consider multiple private channels (up to 30).

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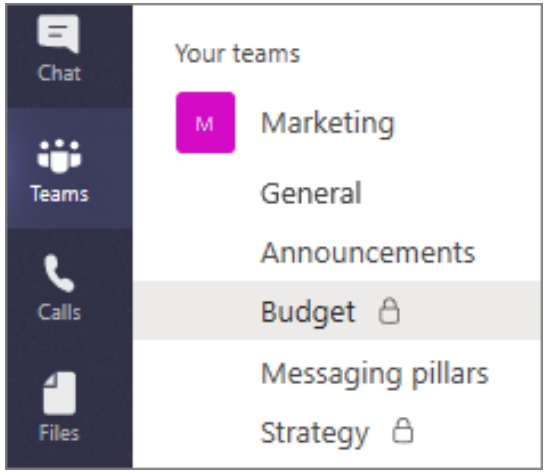
I want to create a collaboration space within my Team to work with people who are not on my Team - while allowing those users to work in their own external tenant or in their own internal Team.	• Shared Channel (up to 50 per team)

Private Channels

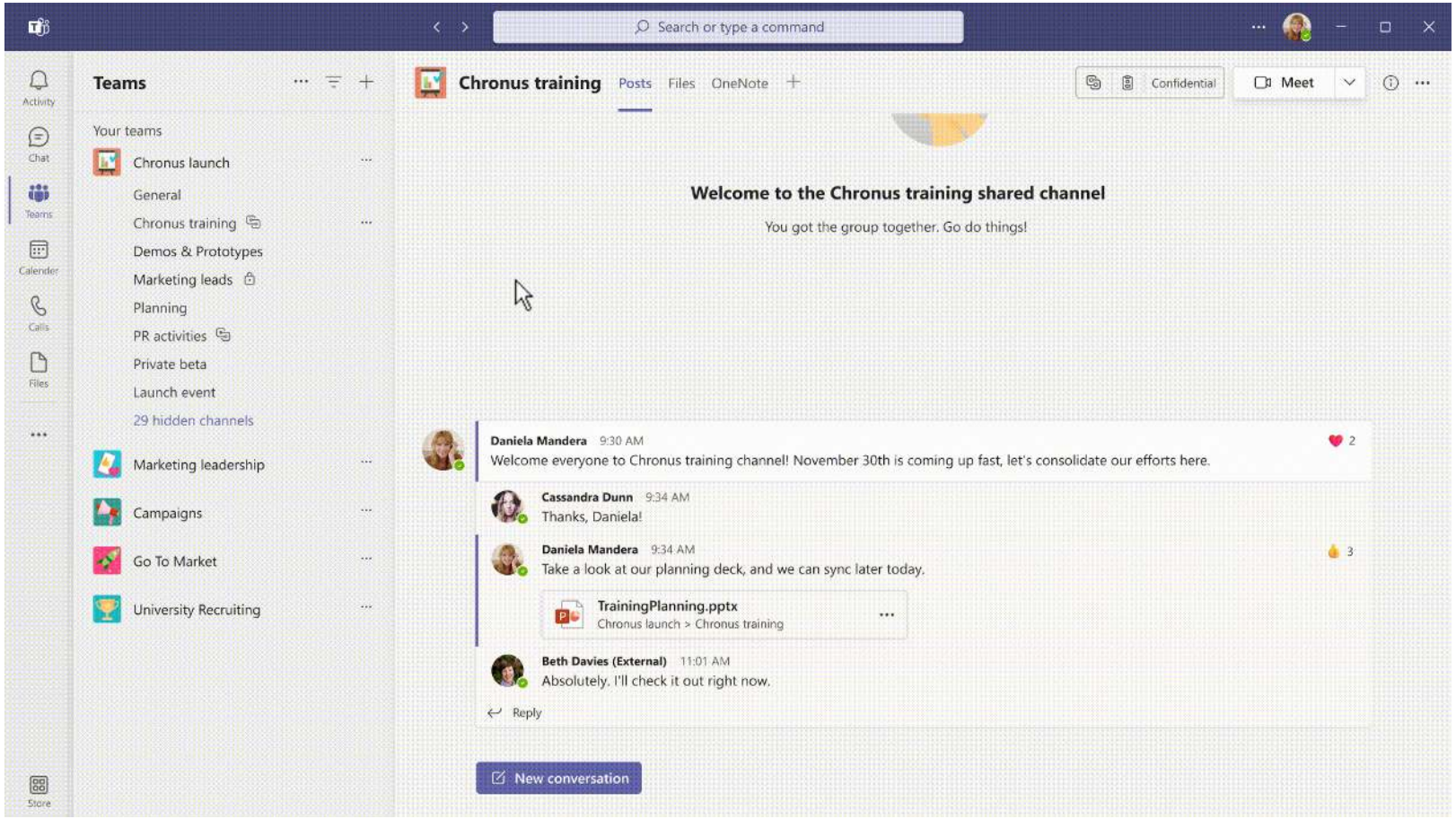
- Focused spaces for collaboration within your Team
- You must be a member of the Team to be added to a Private Channel
- Guests can be added as members if they are already members of the team
- By default, any non-guest team owner or team member can create a private channel
- Up to 30 per Team, up to 250 members per Private Channel
- Each private channel has its own SharePoint site
- Site permissions for a private channel site can't be managed independently through SharePoint
- No channel meetings in Private Channels



Learn more: [Private channels in Microsoft Teams | Microsoft Docs]

Shared Channels – Teams Connect

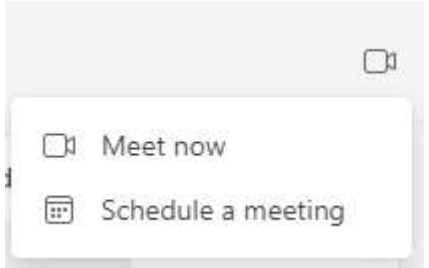
- Schedule a meeting, collaborate in real-time on apps, and share channels with up to 50 teams and as many organizations as you need
- Members of a Shared Channel do not have to be members of the Team
- Public preview March 2022
- Learn more: [Shared channels in Microsoft Teams | Microsoft Docs]



Teams Meetings

- Channel meetings
- Regular meetings

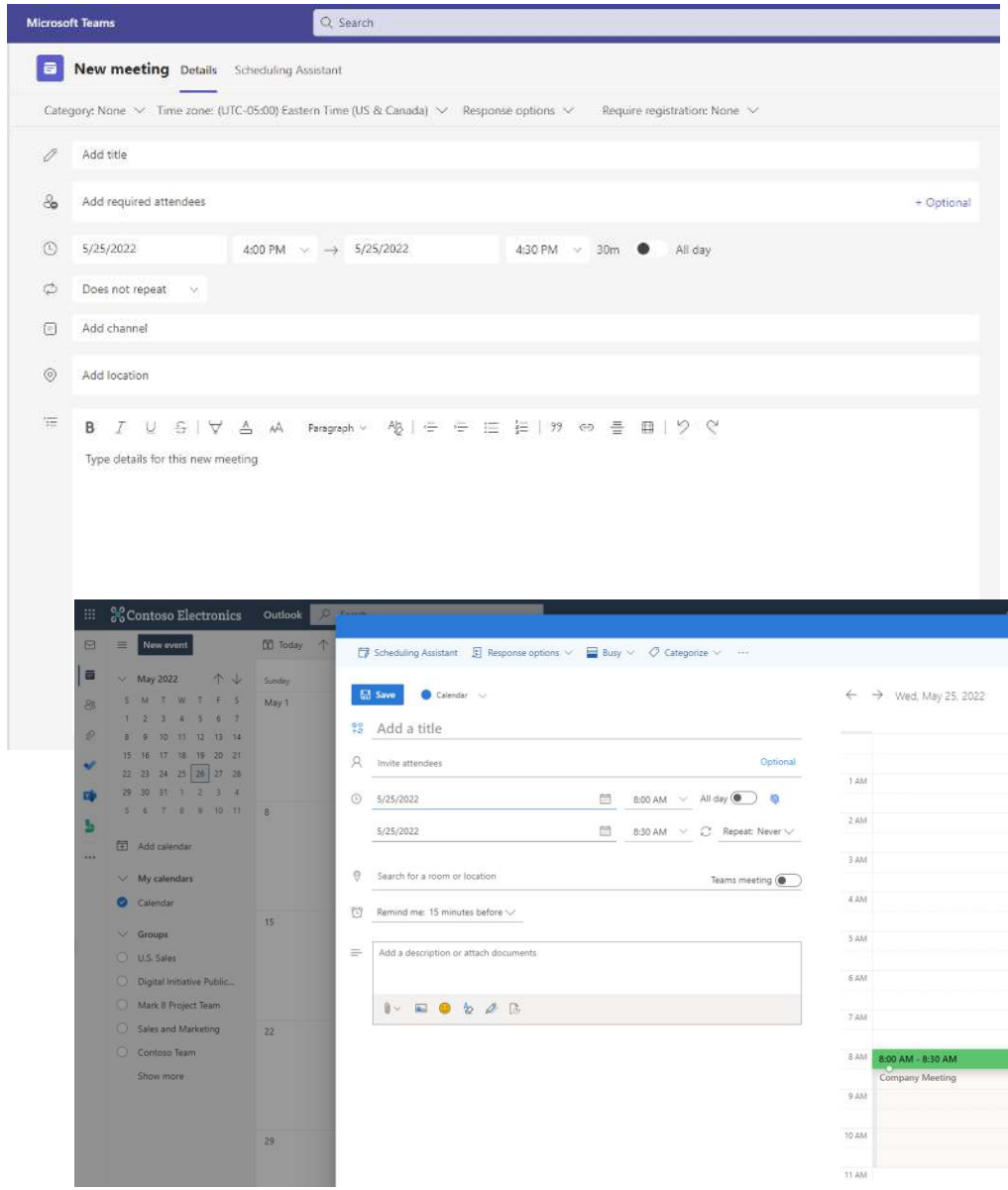
Channel Meetings



- Channel meetings are inclusive; everyone can see the meeting and join if desired, even if not specifically invited
- Can only be scheduled from Teams
- Channel meetings show in the channel where they were scheduled – and in the Channel Calendar and in the Group calendar web part in SharePoint
  - Private channels do not support scheduled meetings – just "Meet now"
- Anyone in the Team can join the meeting
- Internal Team members will not receive meeting *invitations* for scheduled meetings unless you specifically invite them (add to required attendees) **– but Guests will!**
- Members can add channel meetings to their personal calendars even if they are not explicitly invited
- No chat, transcript, or meeting recordings available for people who are not members of the Team
- Recordings stored in the Files tab for the channel (in a folder called Recordings)
- Who can see the recording? Permissions are inherited from the owners and members list in the channel
- Try to use detailed meeting names for channel meetings – so team members know whether they should plan to attend
- If you need certain people to attend, add their names as Required

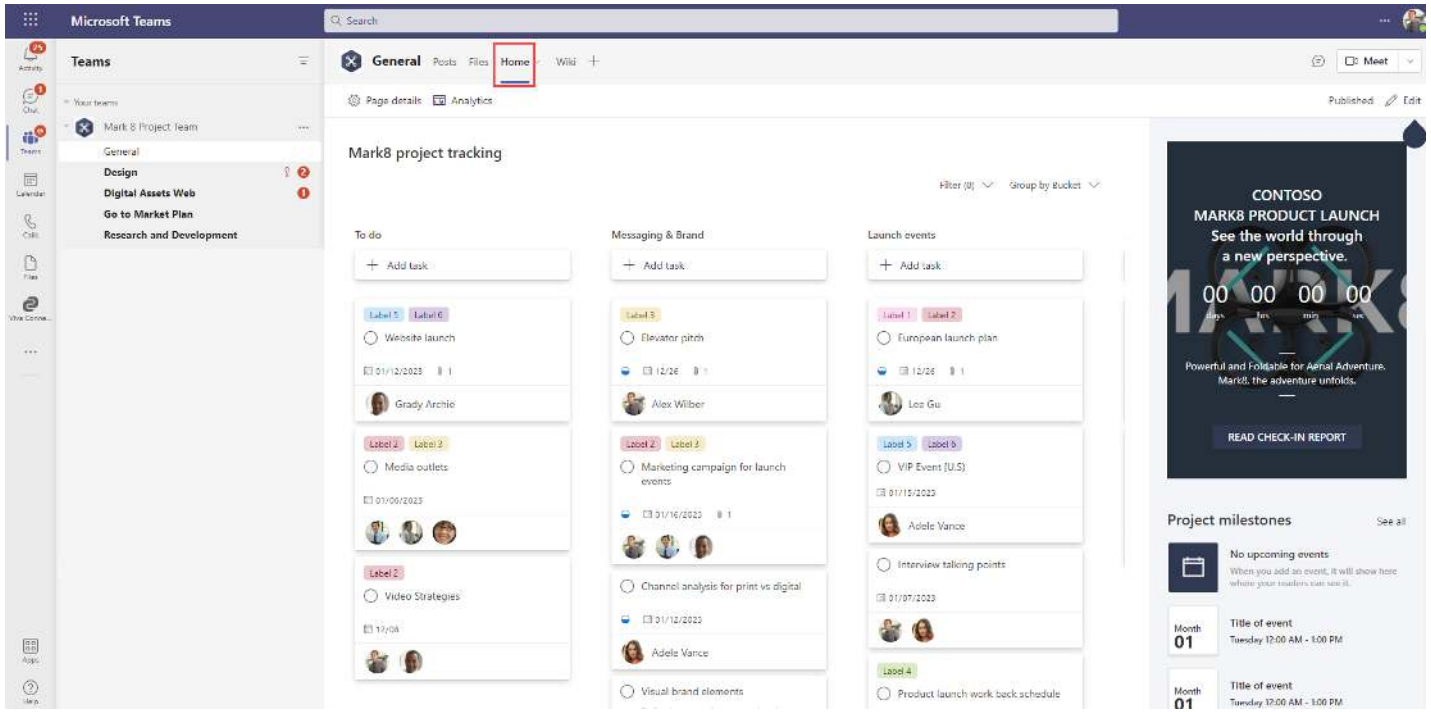
Standard Meetings

- Only invited members can participate – and receive invitations
- Schedule from Outlook or Teams
- Chat, transcript, and recording available to all attendees
- Recording stored in the personal OneDrive for the person who starts the recording
- Who can see the recording?
  - All meeting invitees, except for external users, will automatically get a personally shared link
  - External users will need to be explicitly added to the shared recording by the meeting organizer or the person who started the meeting recording
- Standard meetings are private – only organizer and people invited know about it
- Standard meetings don't show up on a channel calendar



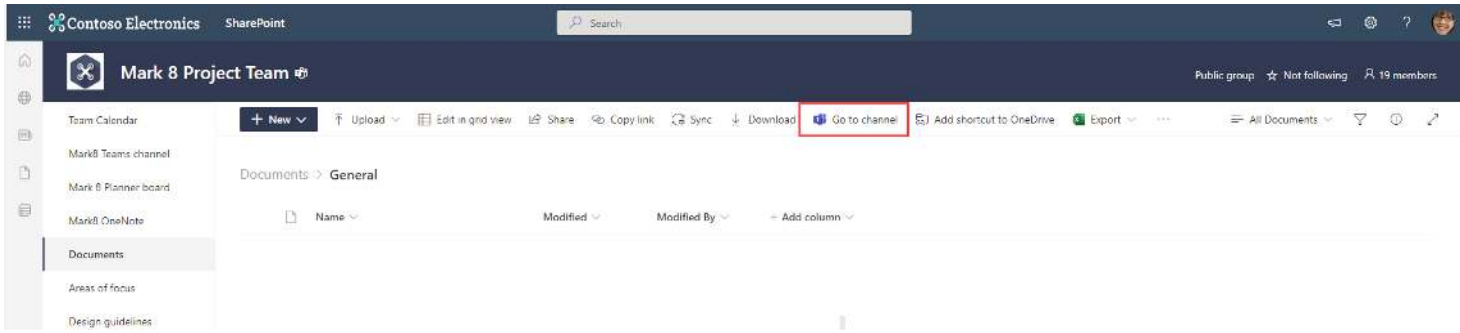
Help users with the transition | Start in Teams – we'll bring SharePoint to you

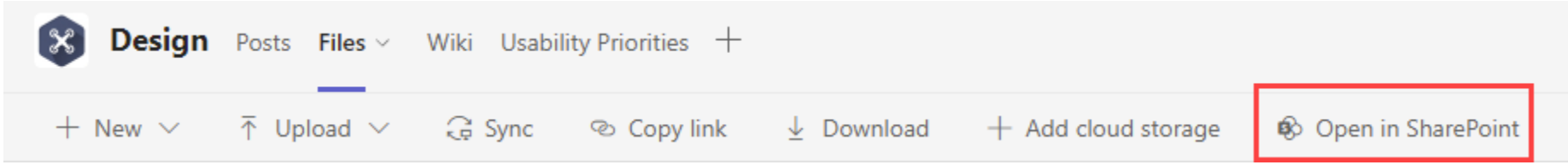
- Make the home page a a tab in the General channel
- Add Lists as tabs in appropriate channels
- SharePoint site navigation is not displayed when you bring a page into Teams – add important links directly on the home page of the site



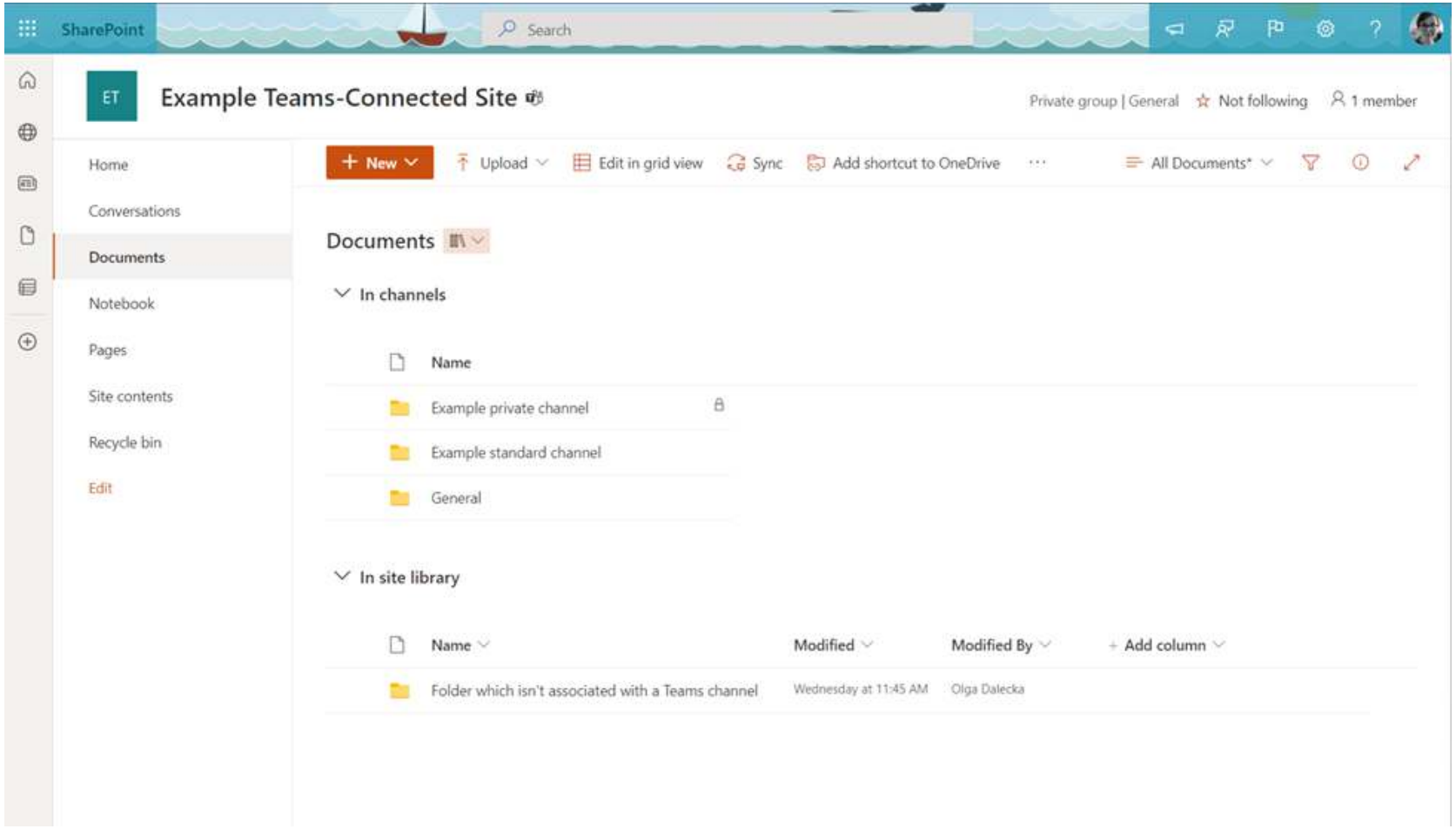
Help users with the transition | Navigating

- Teams-connected sites show the connection
- Channel connected folders in SharePoint help you get back to Teams
- Channel Files tab in Teams helps you get to SharePoint



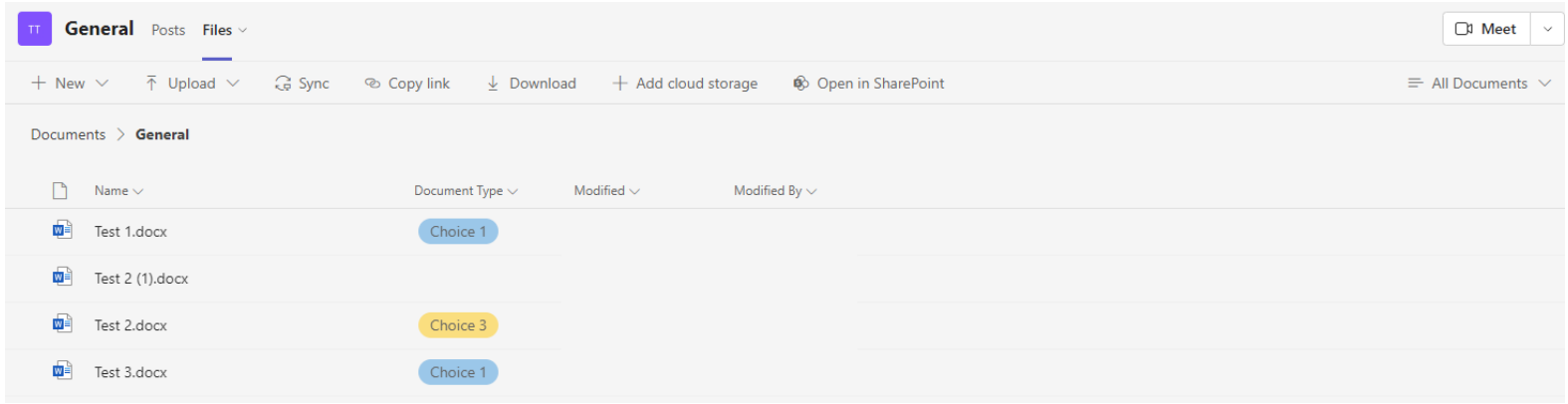


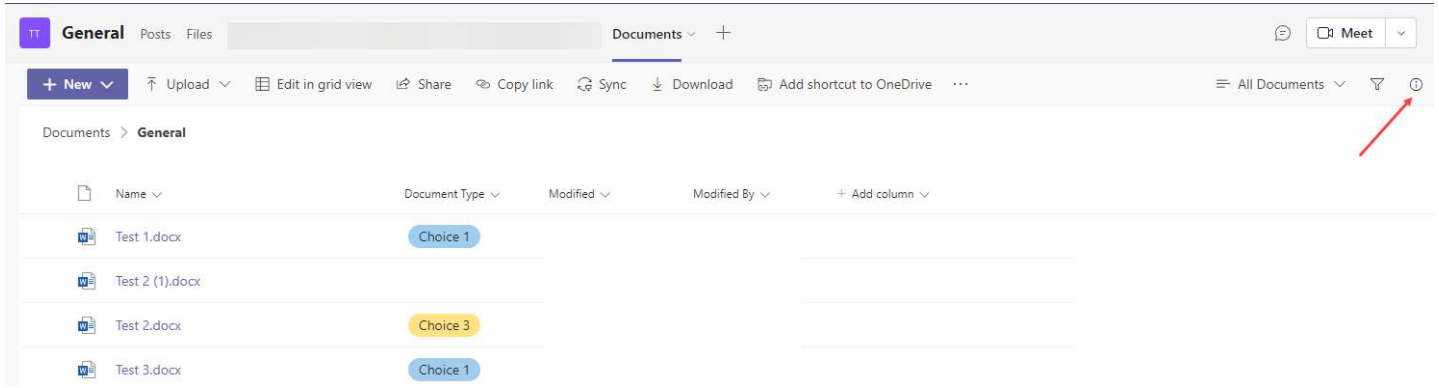
Help users with the transition | File discovery

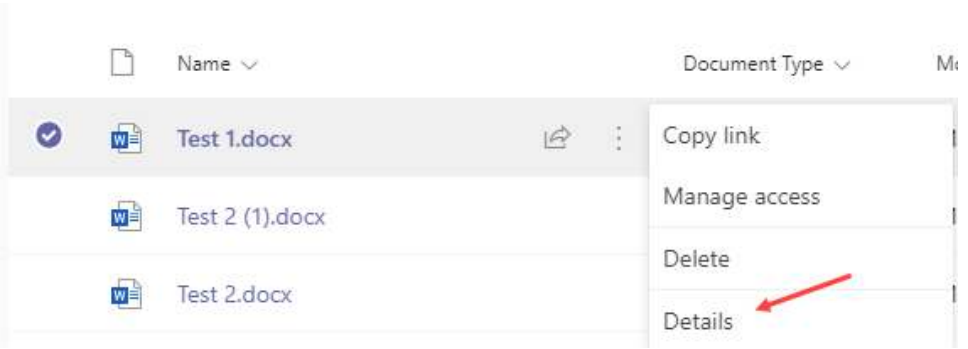


Help users with the transition | File metadata

- Files tab shows metadata – but doesn't let you edit it
- Add the Document Library directly using the SharePoint app
  - Metadata can be edited!



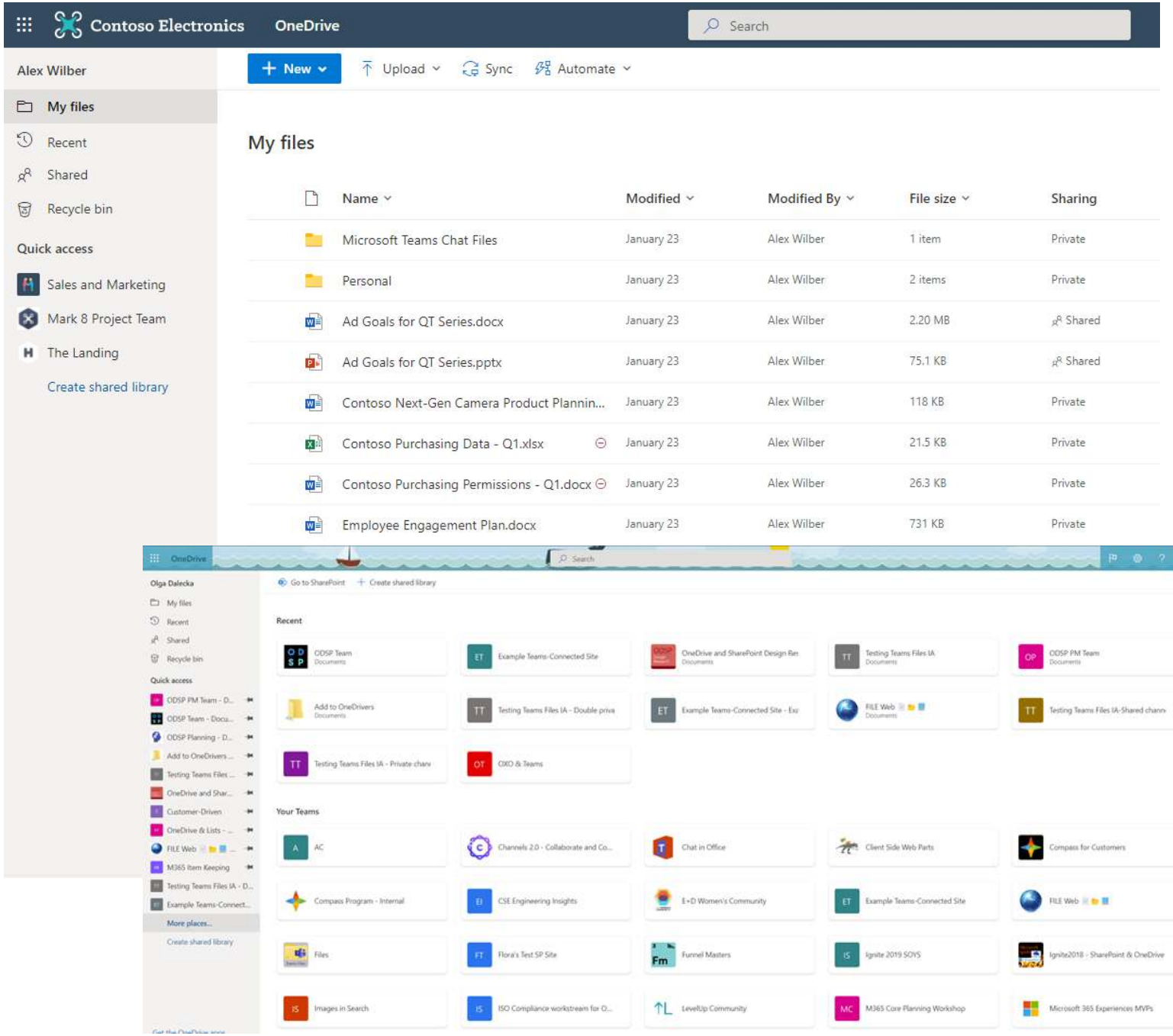




Help users with the transition | Files in chat

- Attaching a file in 1:1 chat – stored in your OneDrive
- Attaching a file in a group chat – stored in your OneDrive
- Attaching a file in a Teams channel – stored in the SharePoint folder for the Teams channel

How can I view all my files in one place? OneDrive!



Additional tips for new Teams users

- It's OK to use folders to organize your team content, but try not to use more than 2 levels of folders
- If you use OneNote, delete the Wiki tab in all channels
- Meet with your Team to discuss your "collaboration contract“

Key take-aways | how to get started

- Identify your team sites in SharePoint that don't have a connected Team
- Is there a Team?
  - Move the files from your legacy SharePoint site to the new one
  - Delete the legacy site
- Do you want to Teamify?
  - Do some planning
  - Groupify, then Teamify
- Are you on prem?
  - Plan Teams
  - Clean up legacy content
  - Migrate
- Help users understand the connections
- Learn more: Teams and SharePoint integration - SharePoint in Microsoft 365

Once you make the transition, you can live happily in Teams!

Susan Hanley

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www.computerworld.com/blog/essential-sharepoint

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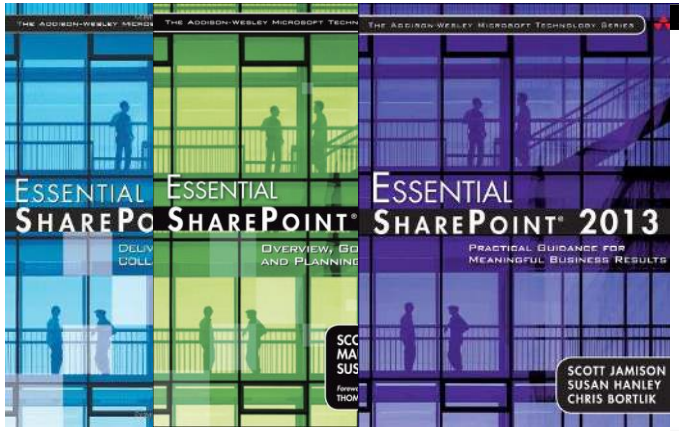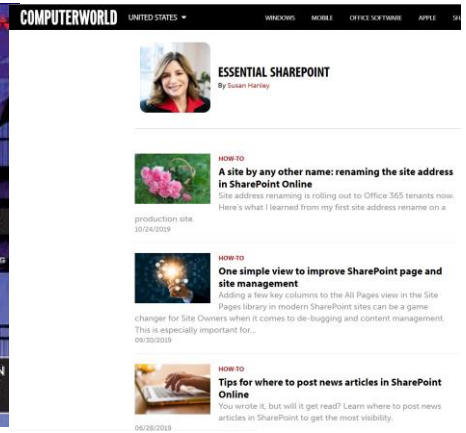
- Information Architecture
- User Adoption
- Governance
- Metrics
- Knowledge Management
- Intranets & Collaboration Solutions