Orchestry

How to Use **Microsoft Teams** for Project Management

Contents

Introduction

Microsoft Teams creates a space where co-workers can chat in real-time, share and collaborate on documents, white-board ideas, meet virtually, and with Mesh, even collaborate in the metaverse with virtual avatars. While a quarter million people regularly use Microsoft Teams, most users today have only a basic knowledge of how Teams can assist with their day-to-day productivity. Our data shows that most organizations continue to leverage only a small subset of what Teams has to offer and underestimate how the platform can help them succeed – a challenge exacerbated by an environment of rapid change.

56%
Of Teams have no customization at all

78%
Of Teams only have a single ("General") channel
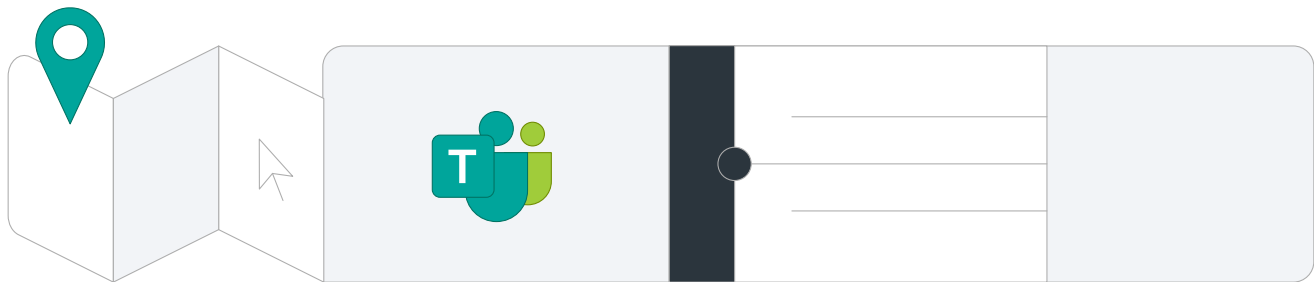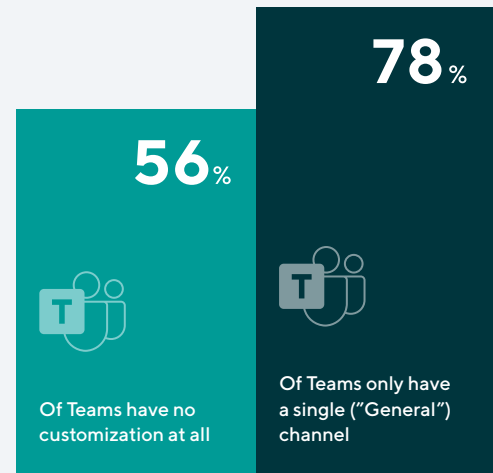
When we review trends across the industry, we see strong patterns emerging, indicating a lack of basic configuration, including:

Inconsistent naming across projects

No integration with supporting apps

No use of audience-based tags

Only a single channel ('General')

No metadata added to lists or libraries

No customization of the Welcome Page

No additional SharePoint Pages

No additional Lists created

No additional channels to organize conversations and documents

Inconsistent naming of Projects

No additional Tabs or Integrations

Team is little more than a shared folder to dump documents

No metadata added to Document Library
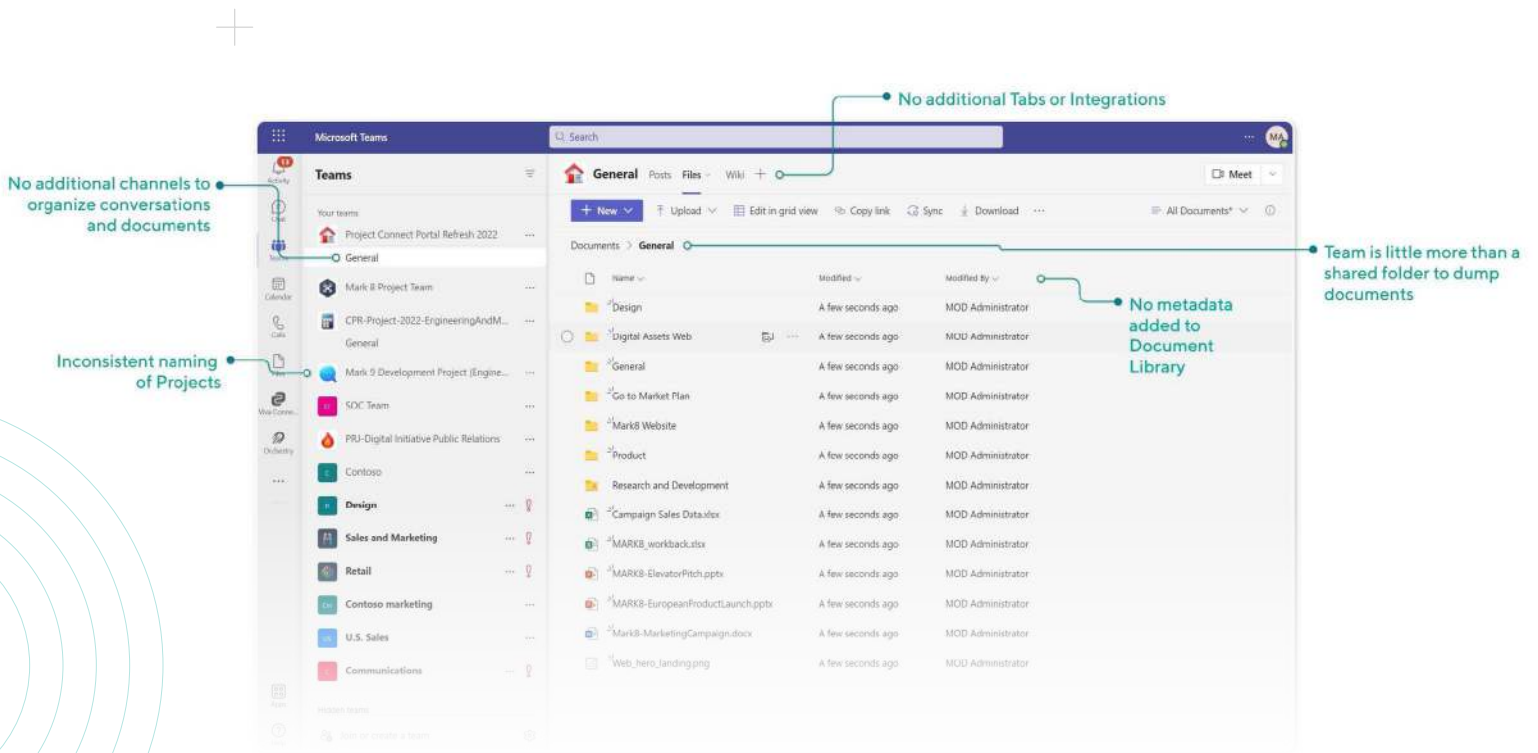
A Purpose-built Solution

Microsoft has been making aggressive investments in Teams, improving its integration with SharePoint and the rest of the Microsoft365 suite, as well as extending into many adjacent areas with its Viva Employee Experience Platform. What many organizations don't realize is that with this deep integration, as well as the increasing ways we can configure the application and its workspaces, Teams has become a truly stand-out solution for managing your organization's projects.
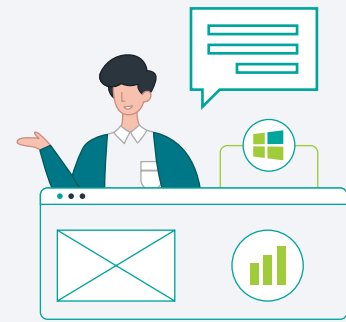
What Projects Need

To create a space to manage projects and initiatives, there are a handful of consistent building blocks or elements that essentially define the activities that the space needs to enable.

| **Task Management**	**Document Management**	**Project Health Management**	**Meeting Management**	**Communication**
Tracking and completing assigned tasks and milestones	Tracking and organizing project outputs	Defining and tracking project progress, scope and schedule	Scheduling, attending and documenting team meetings	Facilitate clear lines of communication between team members

In this eBook, we will outline how you can use Microsoft Teams to successfully deliver on the core elements above, some practical tips to keep in mind, and how Orchestry can further extend the built-in capabilities within Microsoft Teams.

Best Practices for Enabling Project Teams

Because Microsoft offers flexibility in how Teams and Channels can be organized, there are a variety of common patterns that emerge for structuring Projects – all with their pros and cons. We'll evaluate the most common patterns in this section.
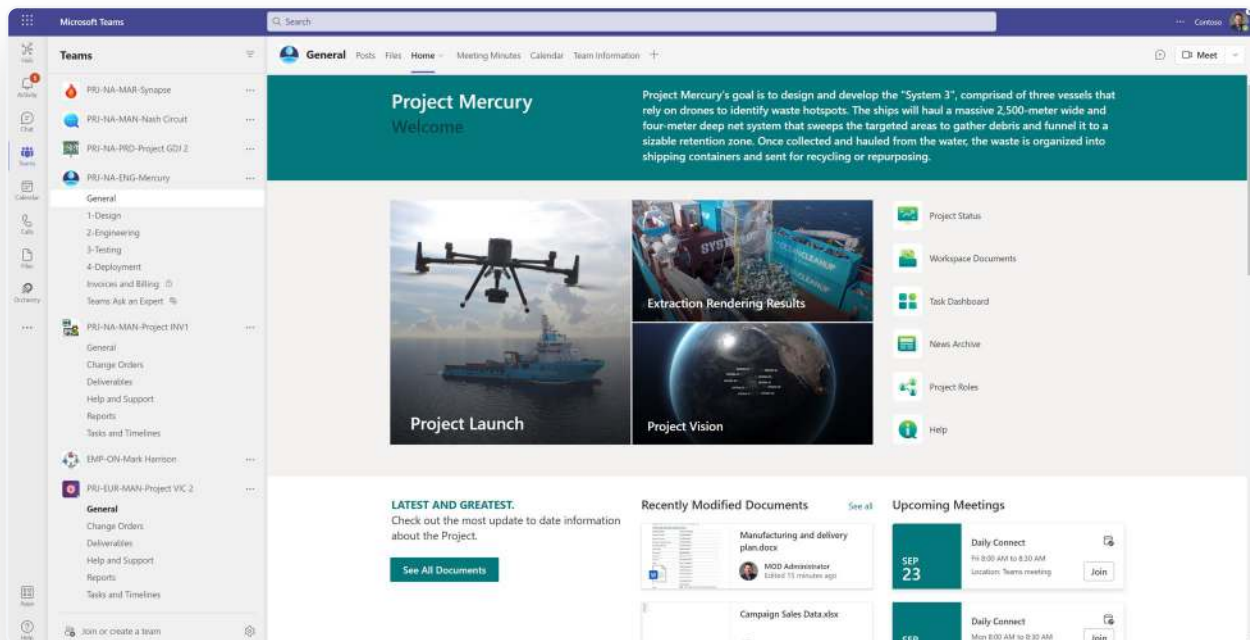
Architecting Teams for Projects

## Option 1: Every Project is its own Team

Perhaps the simplest approach is to create an entire Team – and all its associated M365 group objects – for every project.

The Advantages

⊕ Channels can be used to segregate activities and documents

⊕ Lifecycle can be managed at the team level

⊕ Users can be added and removed easily

The Disadvantages

⊖ Users end up being members of many, many teams

⊖ Discoverability of existing Projects is difficult

⊖ Using only one channel per team reduces the platform's effectiveness
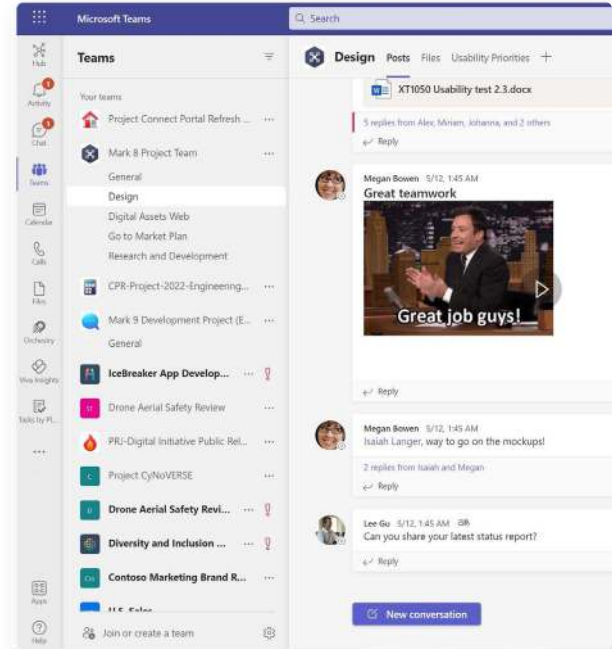
Architecting Teams for Projects

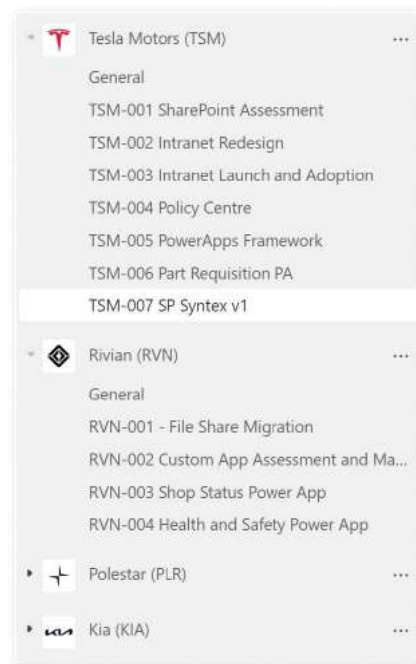## Option 2: Every Project is a Regular Channel under a Parent Team

An especially common approach for organizations that carry out several engagements that are related in some way, such as several projects for the same client, is to create a Team to represent that common relationship and a channel for each successive project within that 'group'.

The Advantages

⊕ Users end up being members of fewer Teams overall

⊕ Projects can be grouped by Client, Function, or other means

⊕ Users can be added and removed easily

⊕ Users will see all engagements for a given client, as the permissions are inherited from the parent Team (both a pro and a con, depending on the situation)

The Disadvantages

⊖ Lifecycle – i.e., the ability to archive projects – must be managed at the Team level, as there is no way to archive (or convert) an existing channel. Although this is one of the top requests on the Microsoft Feedback hub with nearly 22,000 votes, this is not currently in the cards for the short term. As a result, this may require annoying processes such as removing users when a client has no active projects.

⊖ The number of channels under a Group may grow to a point to cause user experience pains

⊖ Channels cannot be used for other purposes. This is one of the biggest downsides of this approach, as it 'reserves' the use of Channels to be used for engagements, therefore Channels cannot be used for any other organizational purposes. For large and complex projects, limiting all project conversations to a single Channel can quickly create information overload.

⊖ Users will see all engagements for a given client, as the permissions are inherited from the parent Team (both a pro and a con, depending on the situation)

Tesla Motors (TSM)
- General
- TSM-001 SharePoint Assessment
- TSM-002 Intranet Redesign
- TSM-003 Intranet Launch and Adoption
- TSM-004 Policy Centre
- TSM-005 PowerApps Framework
- TSM-006 Part Requisition PA
- TSM-007 SP Syntex v1

Rivian (RVN)
- General
- RVN-001 - File Share Migration
- RVN-002 Custom App Assessment and Ma...
- RVN-003 Shop Status Power App
- RVN-004 Health and Safety Power App

Polestar (PLR)

Kia (KIA)

Architecting Teams for Projects

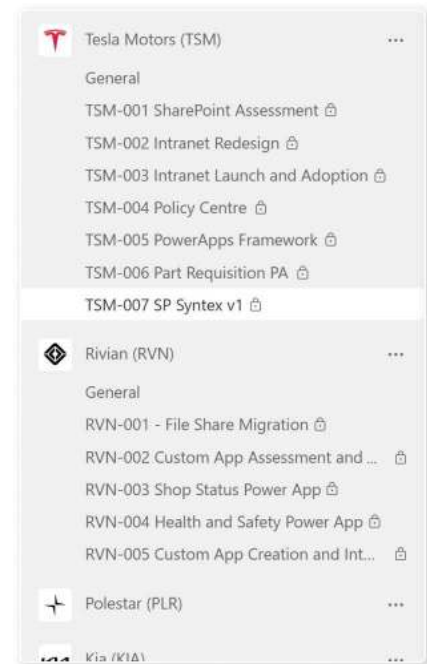## Option 3: Every Project is a Private Channel under a Parent Team

An especially common approach for organizations that carry out several engagements that are related in some way, such as several projects for the same client, is to create a Team to represent that common relationship, and a channel for each successive project within that 'group'. In contrast

The Advantages

⊕ Users end up being members of fewer Teams overall and only see the channels they need to see under a parent Team

⊕ Projects can be grouped by Client, Function, or other means

⊕ Users can be added and removed easily

The Disadvantages

⊖ Private Channels can create an architectural nightmare and users don't know they exist unless invited – potentially disrupting a more seamless flow of information

⊖ Users must be added independently to private channels, negating the advantages of a simpler inheritance model from the parent Team

⊖ Lifecycle – i.e., the ability to archive projects – must be managed at the Team level, as there is no way to archive (or convert) an existing channel. Although this is one of the top requests on the Microsoft Feedback hub with nearly 22,000 votes, this is not currently in the cards for the short term. As a result, this may require annoying processes such as removing users when a client has no active projects.

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Architecting Teams for Projects

Option 4: Team for Internal Use and SharePoint for External Use

For projects that involve both internal and external (i.e., "guests") users, a common practice is to create a Team (or a Channel) for every project with an internal-only audience, and a complementary Team Site to share documentation with both internal and external users. This approach is especially relevant when the Teams conversation features are not required for communication with an external party.

The Advantages

⊕ Keeps internal and external users completely separate, allowing for confidence in a 'safe space'

⊕ Lifecycle can be managed at the team and site levels

⊕ Guests can be disabled in Teams (if desired)

The Disadvantages

⊖ Juggling two workspaces per project means that internal users need to constantly remember where they are leaving files and what context they find themselves.

  ○ This pain can be alleviated with some tips such as adding the client-facing document Library as a tab within the internal-facing Team.

⊖ No conversations are possible in Teams with guests (but this is not always needed)

⊖ Users end up being members of many, many teams

⊖ Discoverability of existing Projects is difficult
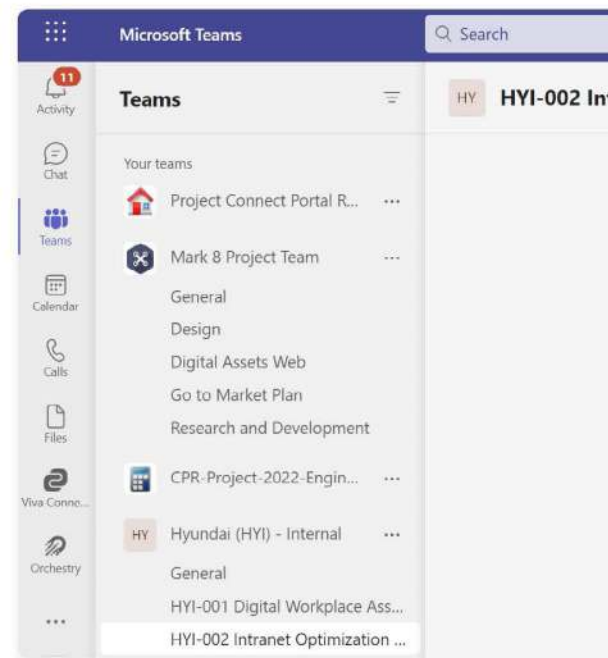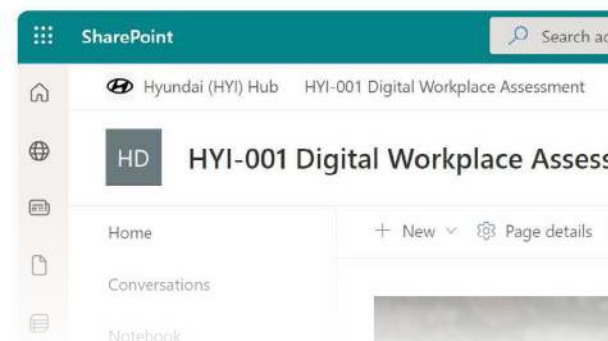
Architecting Teams for Projects
Key takeaway

> Not being able to easily discover existing projects and channels is a disadvantage shared by most Project structures we mentioned.

Pro Tip:

Orchestry solves that with an informative Workspace Directory which allows you to discover and request access to any workspace, including Microsoft Teams, SharePoint Online Sites and Outlook groups.

Task Management

Typically, you begin a project by breaking larger tasks down into smaller components that can be assigned to different people. There are hundreds of online task management tools and surveying the options can make your head spin. Ultimately, if you're managing your team's tasks inside an application that is not deeply integrated with your core collaboration and file management system, you risk decentralized and duplicated processes and creating additional work for your project team.
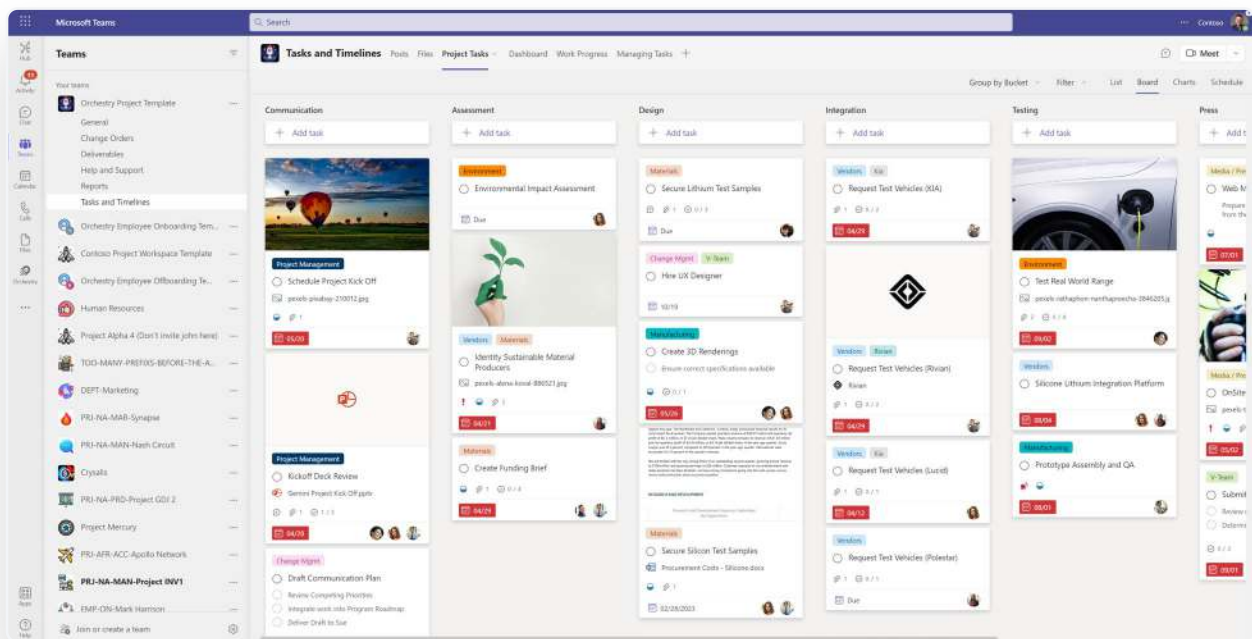
You may not realize that Microsoft 365 has many task management tools. Many of them integrate directly into Teams. Some of the most commonly-used examples are:

Planner	To Do	Outlook	Teams	Loop	Lists

Office	OneNote	DevOps	Project	D365
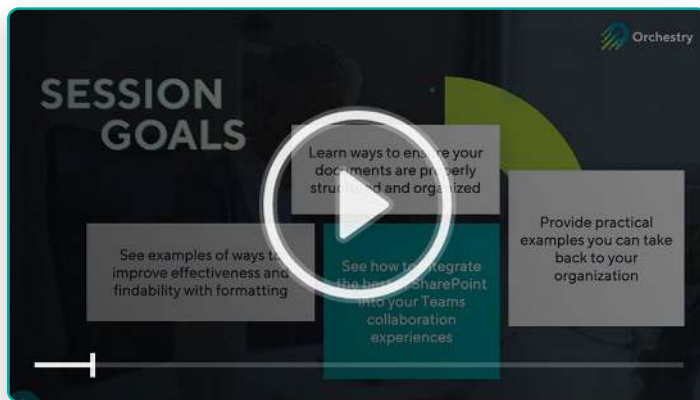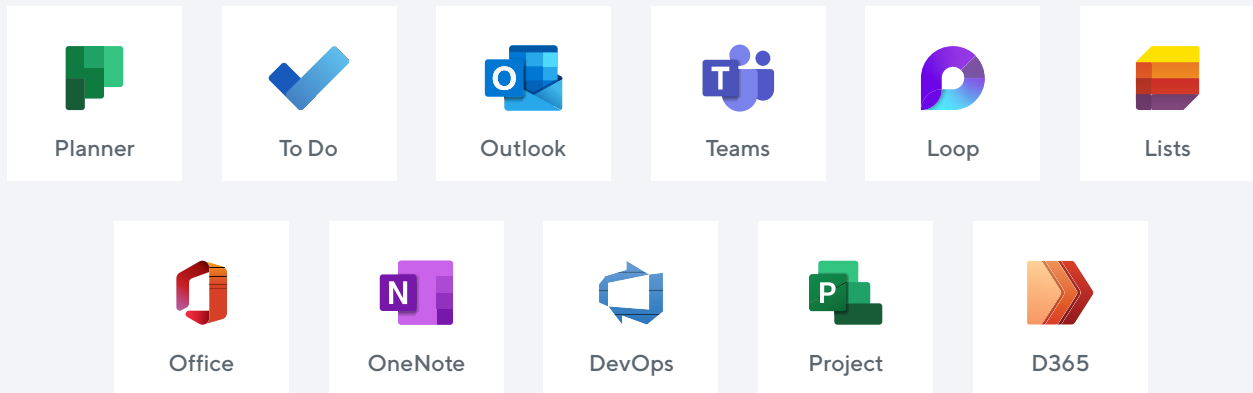
If you're interested in learning more about the apps available and to get a task management deep dive, watch the Orchestry Task Management webinar.

Watch the Webinar

What we recommend

We expect to see this wealth of choice in Task Management stick around. It can be overwhelming to navigate the landscape of tools, even within this single ecosystem. To help with this, we've grouped these applications to help you find the right fit for your teams. You can see from the image below how the various task management apps operate. Unfortunately, some of the current task management applications live as "islands" disconnected from each other, meaning they do not natively collaborate with your core productivity applications like Teams and Outlook. We recommend avoiding these options for the time being. We encourage you to leverage applications that allow for mutual communication between the tools in what we've called the "Task Hub"

Home (Welcome) Page
*created by default

Project Status Page

News Archive Page
*created by default

Document Navigation Page

Team Member Page

Help Page

Team Tasks Page
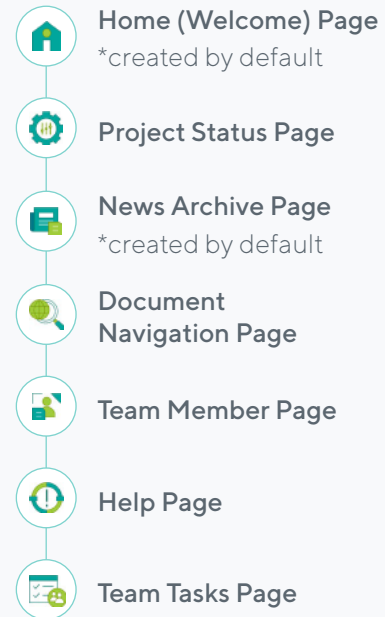
But what about Microsoft Project?

The modern, web-based Microsoft Project is a great tool for Project Managers. It's more user-friendly than it ever has been with multiple views, integration with Power BI, and road mapping for you to overlay multiple projects into a single dashboard. While it's very good, Microsoft Project has significant cost implications and does require you to purchase an additional license for every user.

Microsoft Project is intended for more thorough project management, including resourcing, scheduling, budgets, and timelines. If this is you, and you're looking for more enterprise portfolio management, costs will range between an additional USD$ 10-55 per user.

There isn't one best way to manage tasks within a project, but it makes sense to stick to one or two task management apps, so you and your team don't become overloaded and forced to monitor and maintain too many applications. This helps streamline your task management, so tasks are less likely to be overlooked or missed and reduces management overhead to the minimum amount required. If you do need to use more than one task management tool, making sure they are both available within M365 does typically create (though not always) more integration possibilities.

Document Management

When most people think of Microsoft Document Management, they picture Classic SharePoint Sites and Document Libraries. But SharePoint has become so much more than the file repositories of the early 2000s. You can now reveal more information about files, facilitate collaboration in real-time and make the same content available in Teams or OneDrive. And the formatting options inside SharePoint give you options to completely change the old file list view in favour of modern layouts.

The truth is that today SharePoint and Teams are completely integrated. All the document management capabilities are done through SharePoint, so whether you realize it or not, you automatically get a SharePoint Site that serves as the document management system for your Team.

One of the key goals of a Project workspace is to share artifacts and deliverables between team members. This process of document collaboration and sharing can take place entirely within Teams, making document management more accessible and simpler to communicate to new users.

Project Documents

Name	Document Status	Owner	Document Type	Modified
Alternatives Assessment.docx	✓ Completed	Alex Wilber	Specifications	About a minute ago
Campaign Sales Data1.xlsx	In Progress	Adele Vance	Collateral	A few seconds ago
Fabrikam3DPrinterBrochure.pptx	In Progress	Alex Wilber	Collateral	A few seconds ago
Financial Report - August 2021.xlsx	Not Started	Adele Vance	Report	A few seconds ago
Financial Report - November 2021.xlsx	Not Started	Adele Vance	Report	A few seconds ago
Financial Report - October 2021.xlsx	Not Started	Adele Vance	Report	A few seconds ago
Financial Report - September 20211.xlsx	In Progress	Adele Vance	Report	A few seconds ago
Manufacturing and delivery plan.docx	✓ Completed	Allan Deyoung	Specifications	About a minute ago
Mark 8 - FAQ.docx	In Progress	Irvin Sayers	Specifications	A few seconds ago
Mark 8 Parts and Spec List.xlsx	Not Started	Irvin Sayers	Specifications	A few seconds ago
NASRA Application.docx	In Progress	Adele Vance	Presentation	A few seconds ago
Phase 1 Test Plan.xlsx	Not Started	Lidia Holloway	Test Plan	A few seconds ago
Phase 2 Test Plan.xlsx	In Progress	Lidia Holloway	Test Plan	A few seconds ago
Phase 3 Test Plan.xlsx	Not Started	Lidia Holloway	Test Plan	A few seconds ago

Metadata

Metadata, sometimes called Tags, is simply information we append to our documents to ensure they are properly identified and categorized. while best practices for the use and implementation of metadata can fill multiple blogs easily, the benefits of metadata cannot be underestimated, as they:

• Provide a tool to organize information;

• Provide a method to logically separate content;

• Help search engines find more accurate results;

• Allow for more flexibility in how and where content is stored;

• Facilitate flexibility in navigating information based on the situation or the end user;

• Support the creation of multiple pre-set "views" of the same content (more on Views below);

• Enable a level of consistency and control over how content is labeled;

• Provide a mechanism to support good governance practices (e.g., ownership, retention, etc.).

Certain metadata is always available in SharePoint and becomes applied to content automatically, such as Created By date, Created By User, Modified By date, Modified By User, Version number, ID, and many more. Where metadata really shines, however, is when additional situation-specific metadata is applied to content in a library. Several types of metadata are supported, including Text, Choices, Numbers, Dates, People, and something called Managed Metadata which allows an organization to create a centralized dictionary of terms that are then reused across SharePoint and Teams. With these types available, metadata can be used to classify the status of a document, its type or category, its owner, and even its sensitivity or confidentiality – to name a few use cases – and this can have a big impact on findability and alignment for your team members.

What We Recommend
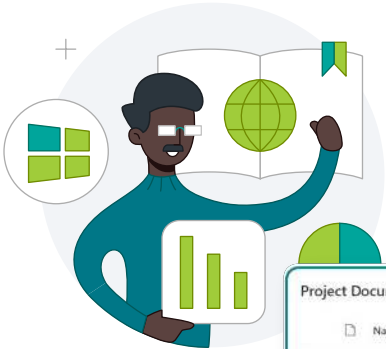
If you are not already using Content Types for this purpose, add a Document Type/Category field as a first step. You can configure this in SharePoint quite easily, either as a Choice column – or better yet – as Managed Metadata, and ensure users tag the correct category when creating or uploading a new document. To be clear, this would not capture the format of the document such as PPTX, PDF, etc.; but instead its purposes such as a Contract, Policy, Procedure, Template, or Form. This small addition can be tremendously useful as it can be used to create custom views, ad-hoc filtering and even simply for adding layers or clarity for users navigating the library's contents.
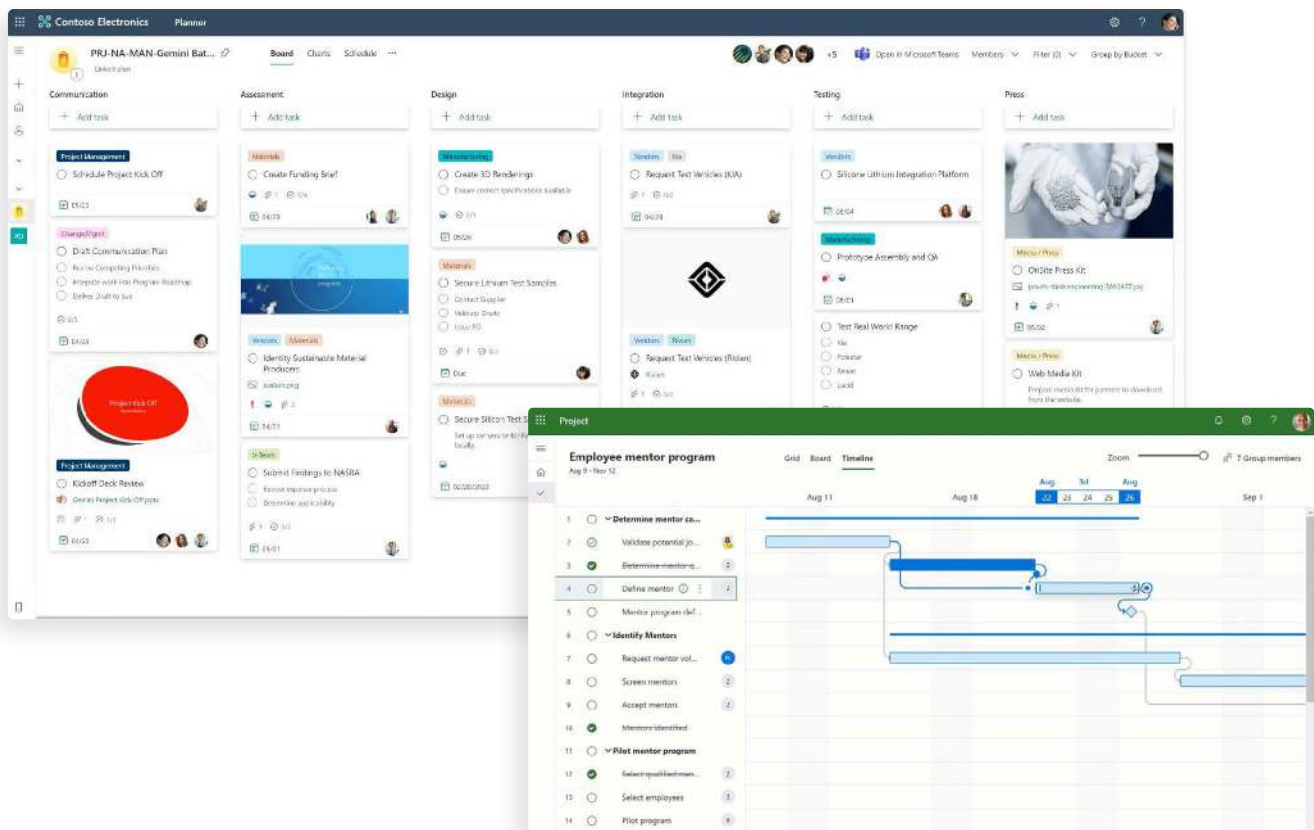
Another place to start could be with a Document Status column, and this one can be a great tool for project managers trying to keep tabs on the status of a deliverable. Depending on your organization, this can be as simple as two or three status choices (e.g., New, In Progress, Complete) or can be more granular and include statuses to capture reviews and approvals. The status can provide immediate clarity to team members about where the document currently stands, who needs to action it next, and can be a simple and effective way to communicate with others without necessitating a meeting or communication.

What We Recommend

We recommend starting your journey into metadata with a select few additional fields, with only one or two additions that are consistently applied to all your Document Libraries. To avoid friction and adoption challenges, it is better to come up with a couple of universally useful fields and apply them across all workspaces of a given type, rather than beginning with different metadata for every single workspace. Keep choices short, obvious, and mutually exclusive. If you're considering adding custom metadata, consider finding ways to Default or pre-set the field to minimize the manual intervention being asked of end users. For example, with a date field, you can default the field to Today's date, and avoid having the user populate this data unless it is an exception to the default value already selected.

Pro Tip

With Orchestry, you can save hours of adding custom metadata fields by creating project templates that are prepopulated not only with document metadata fields and default values, but also the desired document folder structure. If ever changes need to be made to the template, using Orchestry, you can apply them across all projects that share the same template, saving many more hours down the road.

Views

Document Libraries offer support for creating pre-set Views of information. A good way to think of views is a defined "lens" by which to look at the information. Views are incredibly flexible and can be Public (accessible to anyone) or Private (accessible to the user who created it). They allow for consolidating information in fewer libraries and folders by using Views to segregate content, show and hide information when it is appropriate, or simplify what information is shown about documents at a given time.

Some common and useful views include:

- Content created/modified by Me
- Content sorted by date
- Content awaiting approval
- Content flattened (without folders)
- Content grouped by a piece of metadata (e.g., show documents grouped under their current "Status")
- Content filtered to a certain type of information (e.g., show documents filtered to only "Reports")

Priority	Work item	Category	Description	Start date	Due date	Assigned to	Progress	Status
↑ High	Create Kick Off Deck	Planning	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	February 1	2/4/2022		100%	Completed
↑ High	Clean Up Backlog	Design	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	February 1	3/18/2022		25%	In Progress
⊗ Critical	Source Silicone Samples	Research	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	February 15	3/31/2022		50%	In Progress
↑ High	Prepare Battery Architecture Diagram	Design	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	February 14	2/25/2022		0%	Not Started
↓ Low	Locate QA Test Plan	Engineering	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	February 14	2/18/2022		45%	Completed
Medium	Review Health Report	Planning	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	February 21	2/25/2022		100%	Completed
↑ High	Share Kickoff Minutes	Planning	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	March 28	7/1/2022		0%	Not Started
Medium	Create Pitch Deck	Marketing	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	April 18	5/27/2022		90%	In Progress

What We Recommend

The first view we like to add for Project Managers is "Recently Modified". This View is easy to create and relies simply on the automatically–captured "Last Modified Date" that SharePoint is already tracking.

If you do opt to add a custom Document Status field, this can also be the basis for a great view that shows only documents that have been set to "In Progress", or all documents set to "Completed".

A simple way to inject some personalization into your Document Libraries is to create Views that leverage People fields (such as Created By, Owner, or Assigned To) to only show users documents that require their attention. This simple addition can help users see everything they're working on and cut through the noise when they are simply trying to quickly complete their next task.

The options above all include sorting or filtering on existing or custom metadata, but another way to improve your views is to use metadata to 'group' related content together. This small change can have a tremendous impact on findability for users scanning a large volume of assets. For example, you could easily use your Document Category column and display your Library's contents grouped by Category, with all "Engineering Drawings" together in a single section.
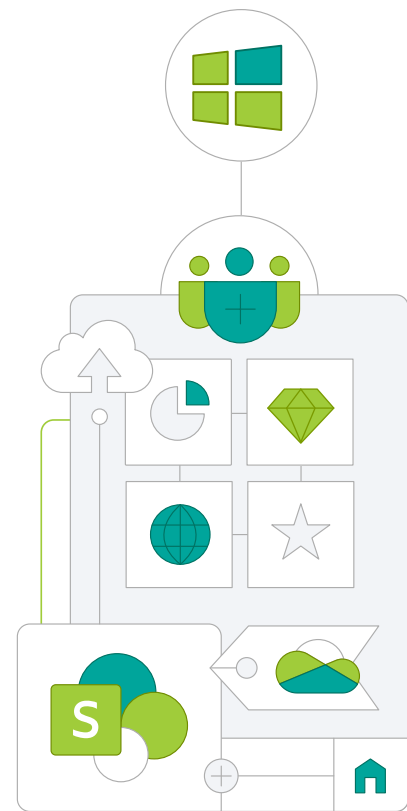
Other Document Management features we recommend for project management in Teams:

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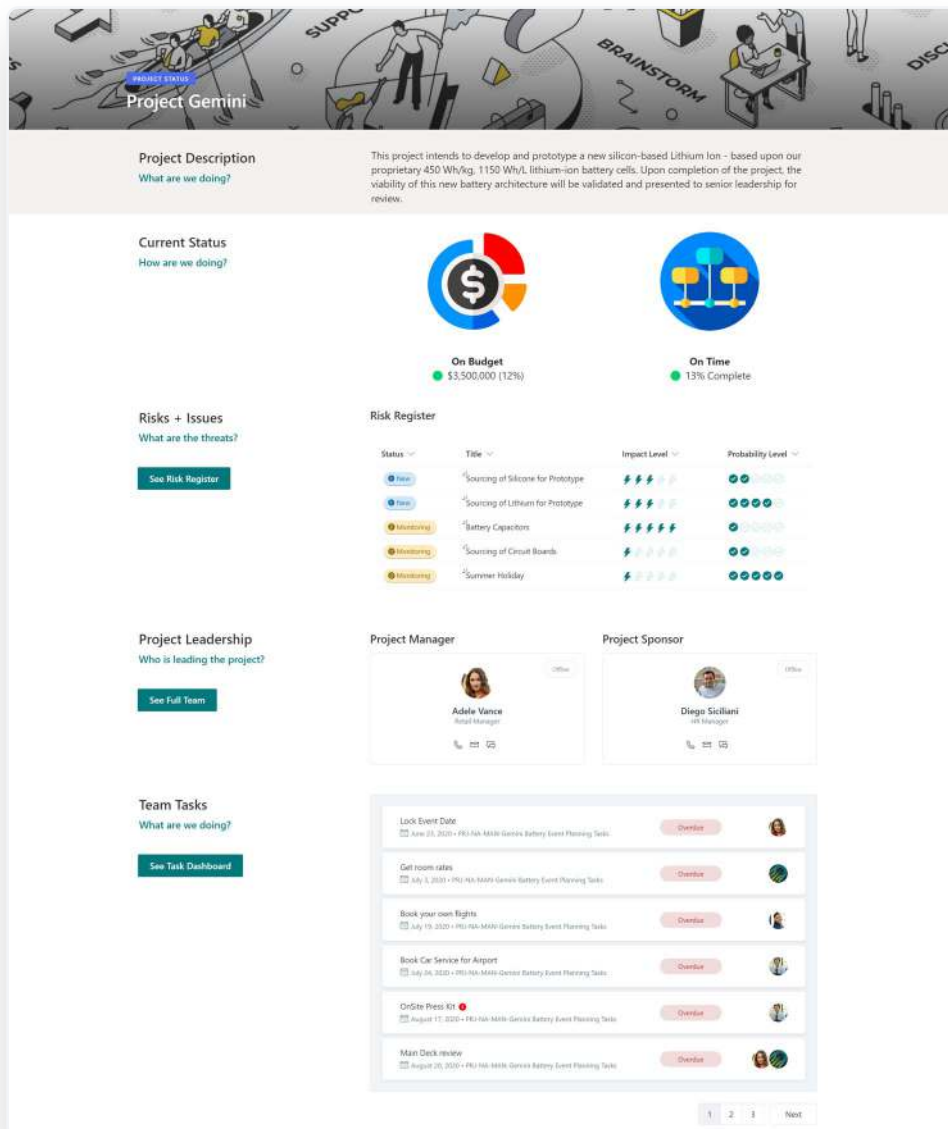
- Version history: Create a historical record of all changes, with the date/time and, user who made the change.

- Approvals: Define status criteria and use built-in features or automation to track revisions and approvals.

- Permissions: Keep content limited to a 'need-to-know' basis with customized permissions.

- Local syncing: Sync the files in your SharePoint site libraries so they're always available on your computer, even when you're offline.

- Real Time co-authoring: Allow multiple people to work on a document at a single time. In contrast, you can enable the "Require check out" option or explicitly check out a document to avoid concurrent changes.
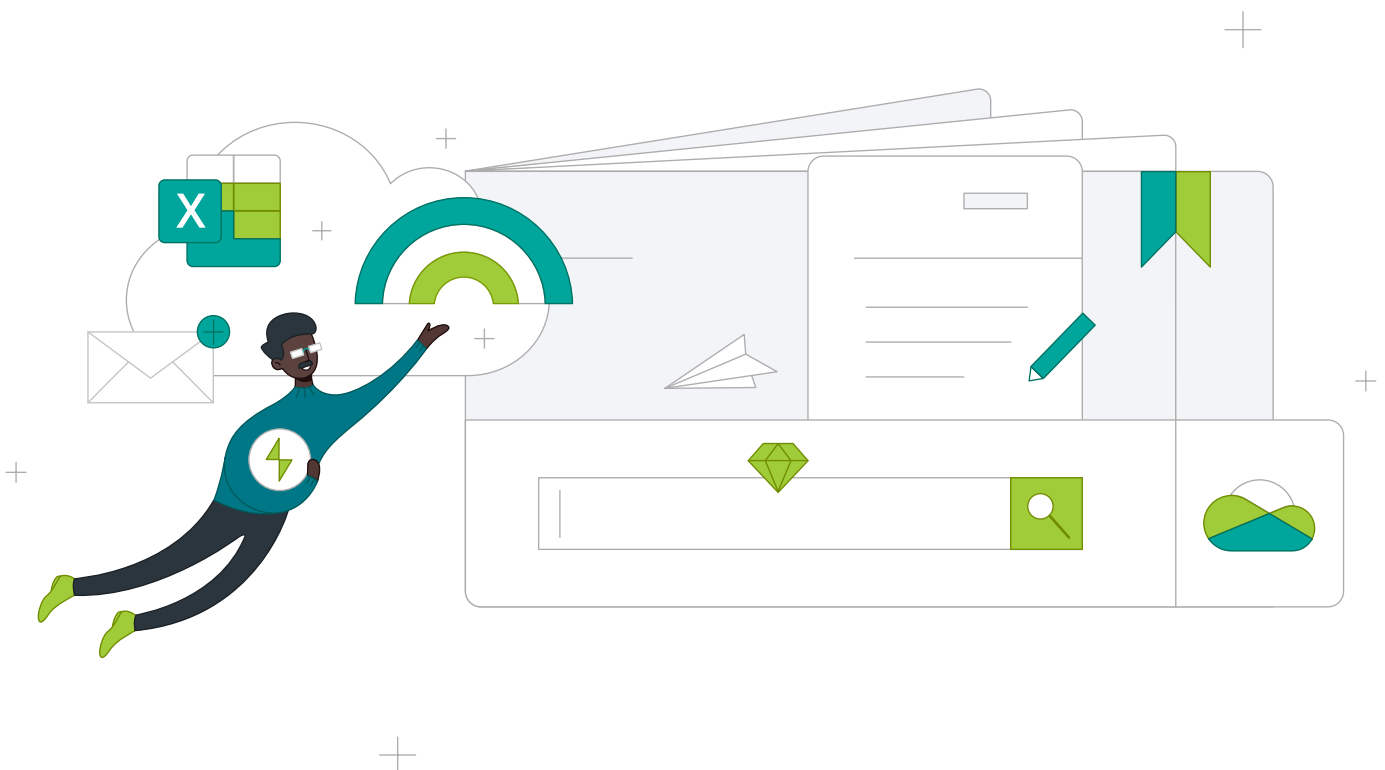
Tracking Project Health

As a Project Manager, it's your responsibility to manage the health of your projects and communicate important information to stakeholders. You'll need to share timeline, scope, decisions, and risks for all ongoing projects in real-time, outside a scrum or meeting.

There are a number of tools within M365, including SharePoint Pages and Lists, that can serve as great mechanisms from which to track and communicate project health.

What We Recommend

Microsoft Lists

For tracking project related items such as: Risks, Issues, Decisions, etc., a Microsoft List (i.e., SharePoint List) is a great flexible mechanism to log and communicate this information. Not only are they incredible easy to tailor to just the information you require, they can also be customized with formatting to tailor their appearance to your desired look and feel (e.g., as a list, as a tile, as a card, etc.).

SharePoint Pages

For tracking and sharing overall project status and timelines, a great flexible canvas for this information is SharePoint Pages. Some examples of these to consider include a Task Dashboard, showing up to date information about a Team's tasks.

Another great example is a Project Status Page with a summary of the key metrics that stakeholders need to know at any given time. This page can be configured to pull from dynamic data populated elsewhere, as well as static information updated on a regular basis, or a combination of the two.

Pro Tip:

Whether you utilize Lists or Pages, and ideally both, Orchestry templates allow your organization to easily re-use these templatized assets and have new projects benefit from their continuous evolution over time.

Meeting Management

A core function of any workspace in Microsoft Teams is as a place to host scheduled meetings and ad-hoc calls with one's team. While there is much more to good collaboration than endless meetings, some facetime with colleagues can be a great way to keep everyone informed and work through difficult challenges. A goal of any Project workspace should be to make it painless
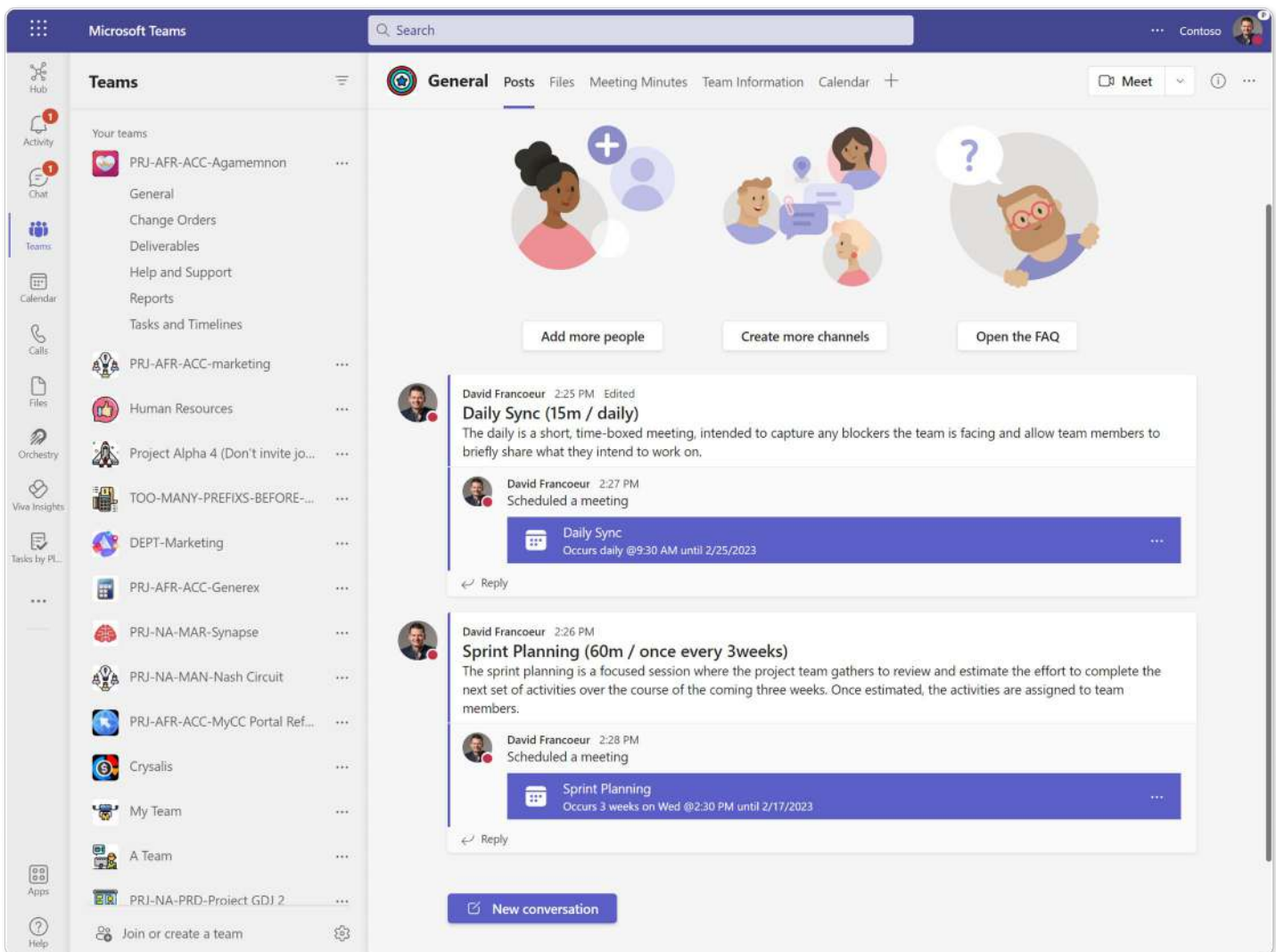
What We Recommend

Scheduling within the Team Channel

To make the most of Teams and ensure everyone is on the same page, we recommend always scheduling Team meetings within a Team channel. This automatically invites participants that belong to channel and also creates a thread in the Team's conversations that will serve as a place to discuss the meeting's topics before, during and after the meeting. Furthermore, Teams will automatically store important information such as any of the event's recordings and transcripts in-line with the history of the thread, making it simple for everyone to get back to those assets if needed.

Automatically Recording Meetings

Many Project Managers will the find the option for meetings to "record automatically" very useful because this can help ensure recordings are always available and do not rely on a user to manually kick them off. If you're in an organization that typically records your meetings, you've probably been in the situation where you've realized half an hour has gone by, and you forgot to turn on the recording. You can configure Microsoft Teams to automatically start the recording at the beginning of the call. No intervention is required.

Meeting Transcripts

The automatic recording function pairs well with the built-in transcription ability. The transcript will now identify who's speaking at a given time, allowing others to search through the transcript while understanding who is speaking when. Not only a great accessibility feature, the transcript can be useful for getting people caught up and a great tool for honing in on a particular snippet of an extended conversation.

Centralized Notekeping

An often overlooked but simple to implement technique is to centralize all meeting notes in a single place. While Microsoft is introducing new methods to take notes during meetings, we continue to recommend using OneNote, especially as we expect to see these options consolidated in the future.

Communication

Effective communication is a delicate balance in every project. You want to make sure your team is informed but not overwhelmed with irrelevant information. There are several tools you can use within M365 to help your teams communicate with both internal and external stakeholders:
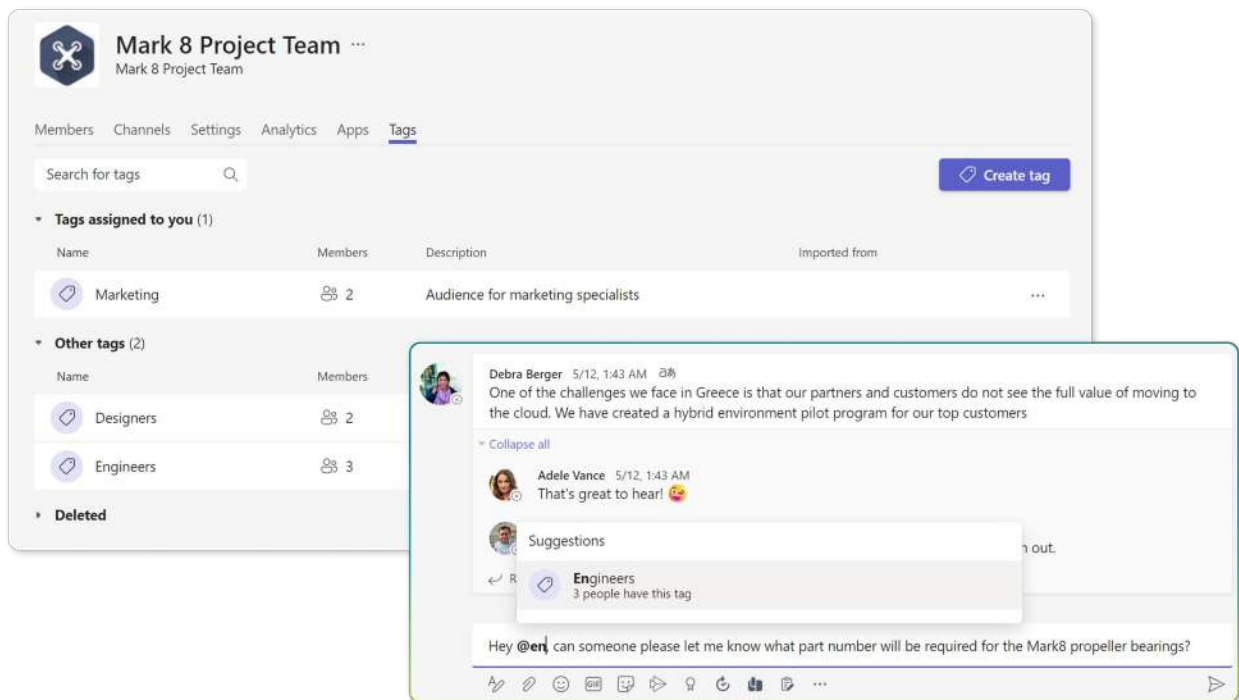
What We Recommend

SharePoint News

A valuable but under-utilized tool for the vast majority of Microsoft Teams is the ability to draft, collaborate and publish News using a flexible but powerful canvas with a wide variety of built-in components to display text, links, and a variety of other rich media. News can be a particularly effective way to summarize key project achievements with the rest of an organization. SharePoint automatically creates and maintains an up to date News Archive for every SharePoint Site, meaning you have a single place to point any user wanting to catch up on authoritative posts from the Project team.

Pinning Key Resources as Channel Tabs

We've already discussed how SharePoint Pages and Lists can be a versatile and powerful medium to communicate key information about a project. These important sources of information, among a host of others, can be pinned as Tabs to a Team's channels, ensuring that the most valuable assets are merely a click away for users of a Project Team. In addition to pinning Document Libraries, Lists, Pages, and Links to External Websites, a huge assortment of third party tools support integration as Tabs – truly turning a Microsoft Teams into a central hub for a project's information.

Pro Tip:

with pre-built workspace templates found in Orchestry, you can configure pinned Tabs for every project type, Team site, communication site and Microsoft group.

Tags

You're probably already using @ symbol, mentioning people to call attention to certain posts and documents. You can take it one step further and use tags to create different audiences within your team. For example, if a Project Manager wants to share an update with only the engineers that make up a project team, they can create a marketing tag that contains this audience and @mention it to notify the desired subset of users. This can not only save precious time, it can also avoid unnecessary noise for team members for whom certain conversations are not critical

This is just the beginning.

Microsoft Teams creates a space where co-workers can chat in real-time, share and collaborate on documents, white-board ideas, meet virtually, and with Mesh, even collaborate in the metaverse with virtual avatars. While a quarter million people regularly use Microsoft Teams, most users today have only a basic knowledge of how Teams can assist with their day-to-day productivity. Our data shows that most organizations continue to leverage only a small subset of what Teams has to offer and underestimate how the platform can help them succeed – a challenge exacerbated by an environment of rapid change.
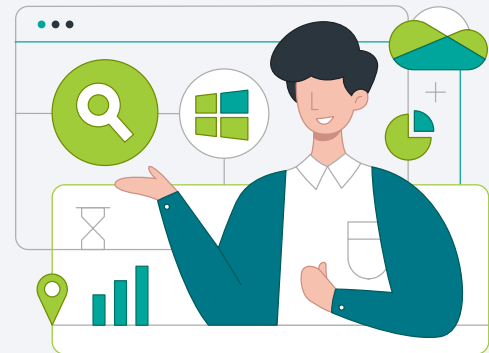
A little about Orchestry

Orchestry enables you to create reusable project templates which include all the features we've outlined so far and much more. Once configured, all projects in your organization can mirror the template and everything it contains – streamlining the provisioning process, ensuring consistency across projects and most importantly – providing a sustainable means to iteratively evolve your templates from every Lesson Learned. The Orchestry platform can be installed in minutes – allowing your team to begin creating workspaces almost immediately.
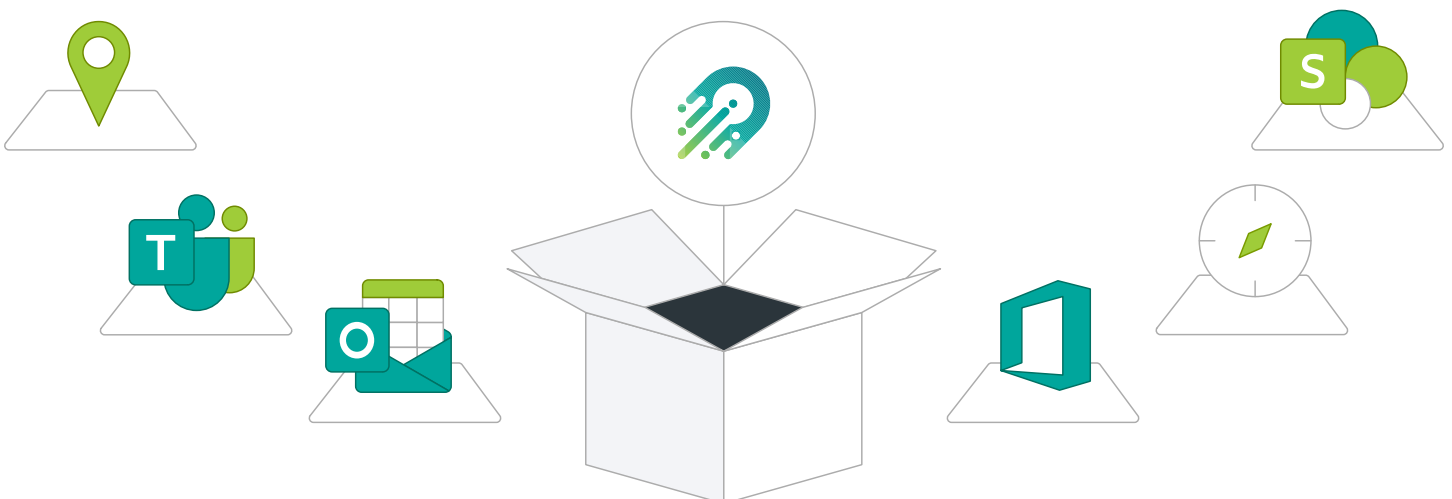
How Orchestry helps manage your projects

Templating

Orchestry is the platform for Administrators, Team Owners and End Users. By virtue of its ability to quickly create entire templated workspaces within minutes of a request, it is also of great value to Project Managers. They will benefit from Orchestry's capabilities to create a fully configured project with the click of a button, complete with all the required tools, tasks, documents, and channels – and all without the need for deep expertise in Microsoft 365.
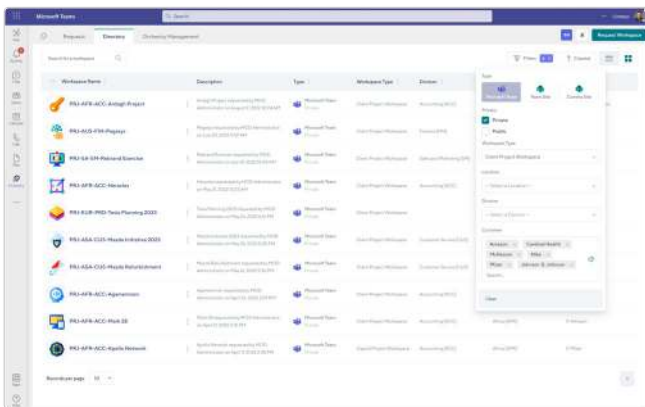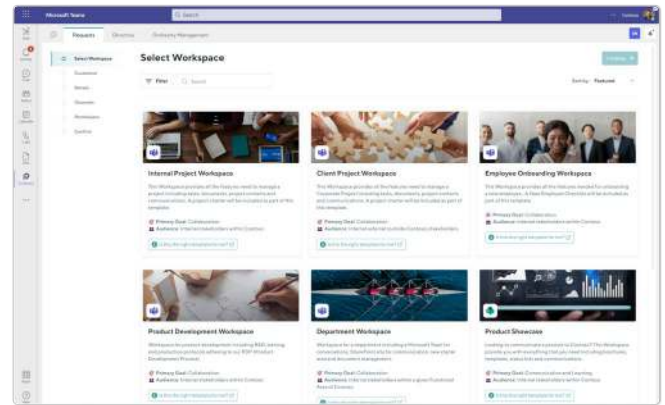
Findability

Orchestry also helps you find projects within Microsoft 365 to ensure that you are not creating duplicate projects, or creating multiples sources of truth. Via its highly configurable Workspace Directory, the platform makes for an incredibly powerful search, filter and sort experience that can help user quickly see a desired cross section of all workspaces.

Naming Conventions

You'll want to consider naming conventions and best practices for keeping track of project progress when working in Teams. With only a small thumbnail and a name to go by, an intutive naming convention can have a tremendous impact on users' ability to get to the correct Team quickly. Orchestry helps you establish robust and dynamic naming practices and enforce them seamlessly across all your projects.
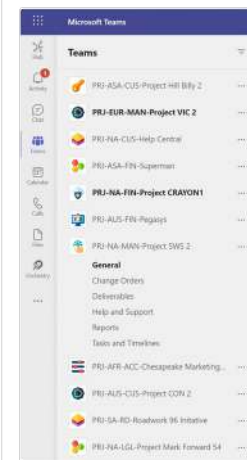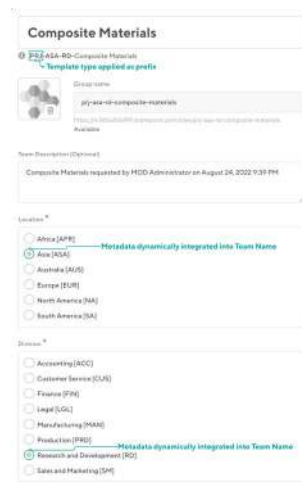
How Orchestry helps manage your projects

Lifecycle Management

Projects are typically defined by a stand and end date – but what happens when a project is completed and its members no longer need active access to the workspace and its contents?

How do you manage the endless sprawl of new projects? With Orchestry you have the tools to monitor and analyze activity across your entire workspace ecosystem, giving you detailed insights into what workspaces are being created, which are in active usage, and which could be candidates for archive. Orchestry's powerful archival and renewal policies allow administrators to effectively delegate responsibility to Team Owners or specific individuals, reducing a complex technical endeavour into a more manageable business decision. The platform's intelligent notifications are only triggered when desired or based on inactivity thresholds, and can perform a wide variety of content processing and workspace operations, all while safely retaining any desired content for future reference. By effectively taking the manual administrator and time–consuming guesswork out of the process, workspace sprawl can be a thing of the past.
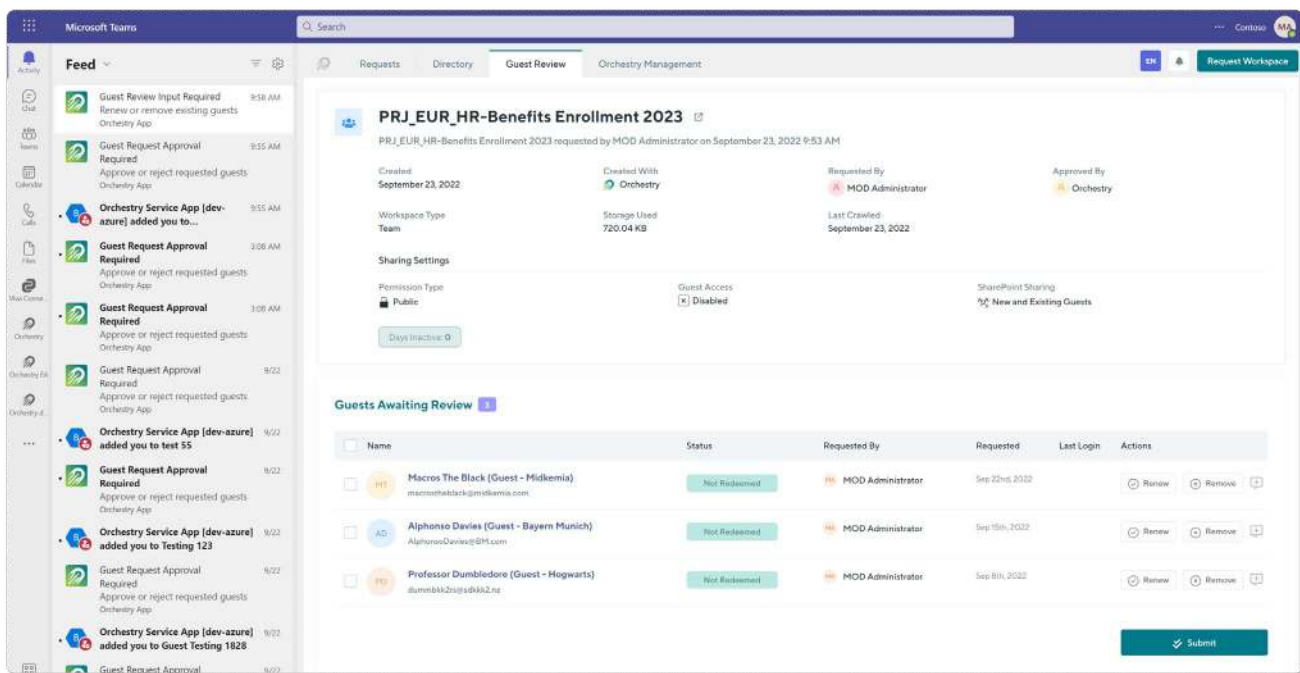
How Orchestry helps manage your projects

Guest Management

Projects oftentimes require collaborating with users outside of your organization. Orchestry's latest Guest Insights & Lifecycle Management features allow Orchestry users to collaborate effectively on projects without compromising the security of their organization. With these features you will be able to:

- Get to know the Guests in your Microsoft 365, where they came from, who invited them originally and when, what they have access to.
- Collect additional information on your guests beyond the standard Microsoft 365 requirements, including their contact details, profile picture, department, location, and more
- Empower Project Owners to manage Guests effectively
- Ensure compliance and avoid security risks and issues

Learn how Maine Source Homes standardized project management in Microsoft 365 with Orchestry and saves USD $200,000⁰⁰ + annually.

Read the case study

Orchestry

Trusted by thousands of IT admins, and leading Microsoft 365 partners worldwide

- **Fully secure** application attested by SOC2 Security certification
- **Full feature 28-day trial,** zero commitment
- **No credit card required**
- Orchestry apps installation takes **less than 15 minutes**
- **No obligation** – if Orchestry is not your cup of tea, simply delete the apps at the end of the trial and all the content you created using Orchestry will remain

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