

Microsoft Teams

Secure information
management with
workgroup automation



SOLU365

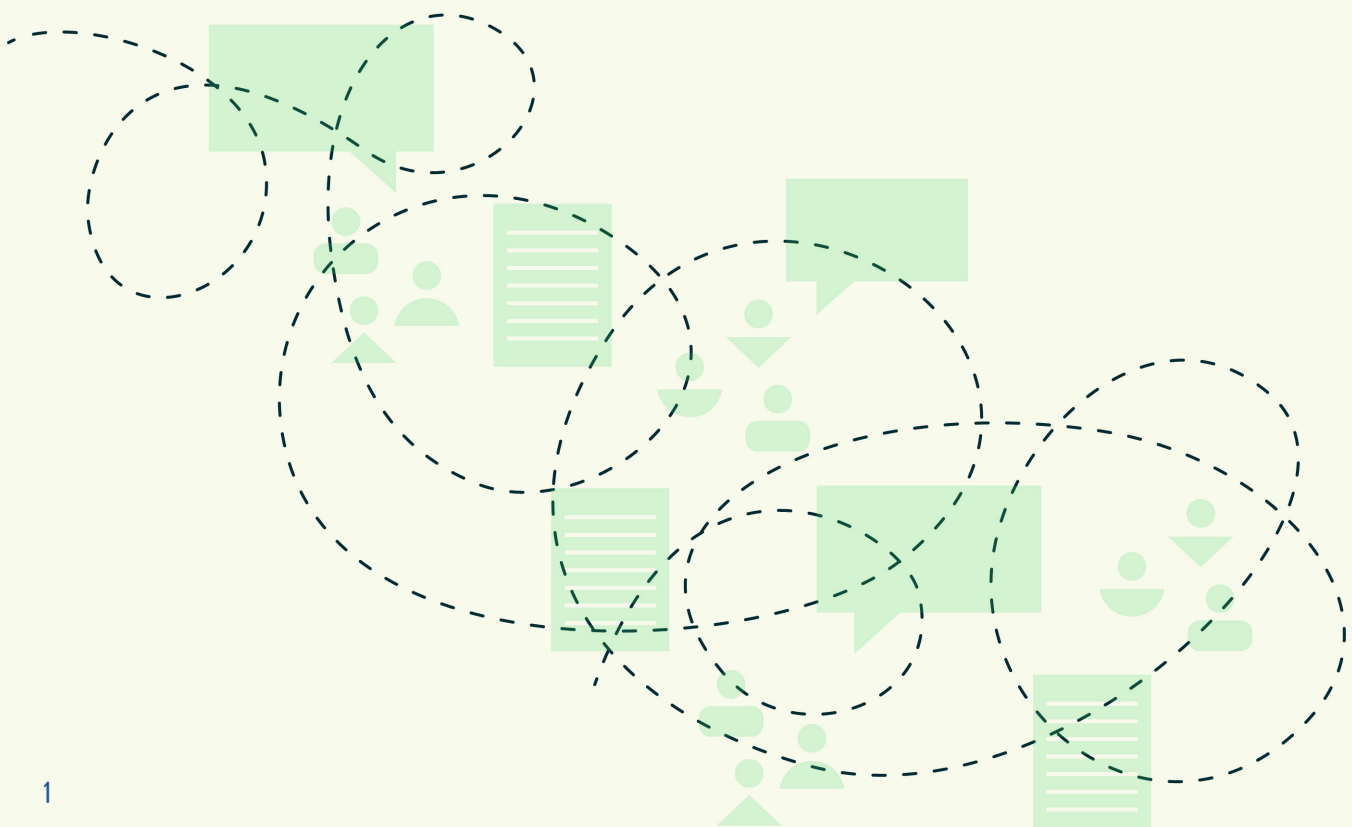
Microsoft Teams – secure information management with workgroup automation

People in different organizations and roles, and sometimes also doing the same job, use Teams in different ways; creating new projects, producing, and sharing new information, and collaborating with others can become inconsistent, confusing, or uncertain. Information is shared uncontrollably, making it difficult to access, use, share and protect.

This makes the organization less collaborative, inefficient, and less productive, as well as vulnerable to many security risks.

At Solu, we believe that one of the keys to a successful organization is efficient and secure data processing. We believe that the fruits of collaboration, such as discussions, documents, to-do lists, and videos, are created for the common goals of your organization. That's why we developed the Solu 365 for Teams group lifecycle management automation.

Our guide to consistent and systematic management of Microsoft Teams groups will help you understand the potential of Teams workgroup automation to strengthen your organization's own data model. At the end of this guide, you'll find our helpful checklist to make it easier and more secure to manage Teams groups throughout your organization.



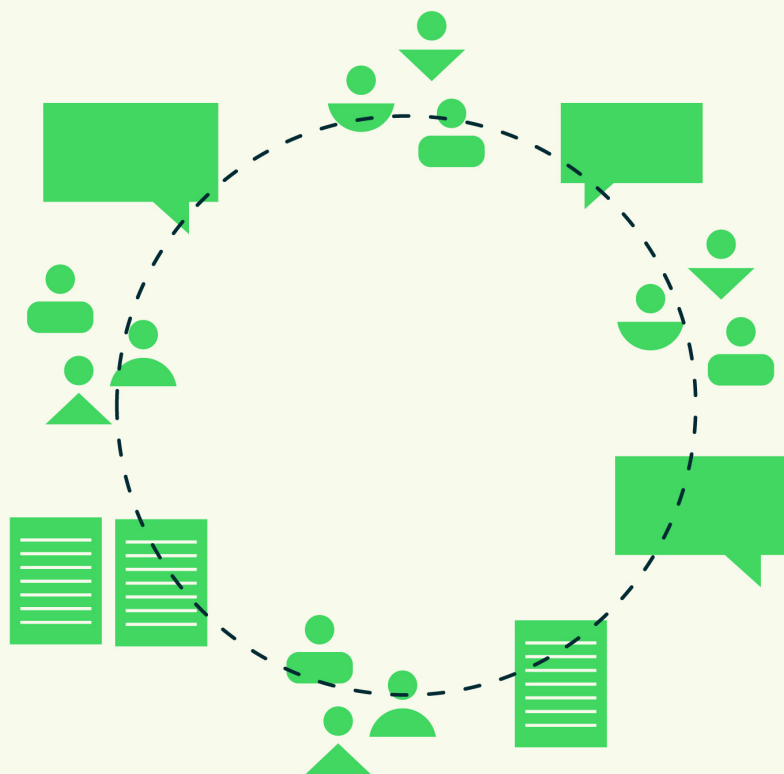
Boost your use of Microsoft Teams and Microsoft 365 with automation

Automation makes it easier for both end users and IT personnel to manage Teams groups. For example, the creation and archiving of Teams groups can be automated in a user-friendly way without compromising security.

Solu 365 is a tool for improving work efficiency and productivity that facilitates communication and collaboration in Teams and Office 365 groups between internal and external organizations. It allows each user to manage and share information, documents, and other resources easily and securely to the right people in the right channels and groups.

Solu 365 streamlines work and helps employees focus on the essentials of their work:

- A clear and simple process for creating Teams groups
- Transparent and easy navigation to Teams and Microsoft 365 groups
- Secure group management
- Manageability and transparency for Office 365

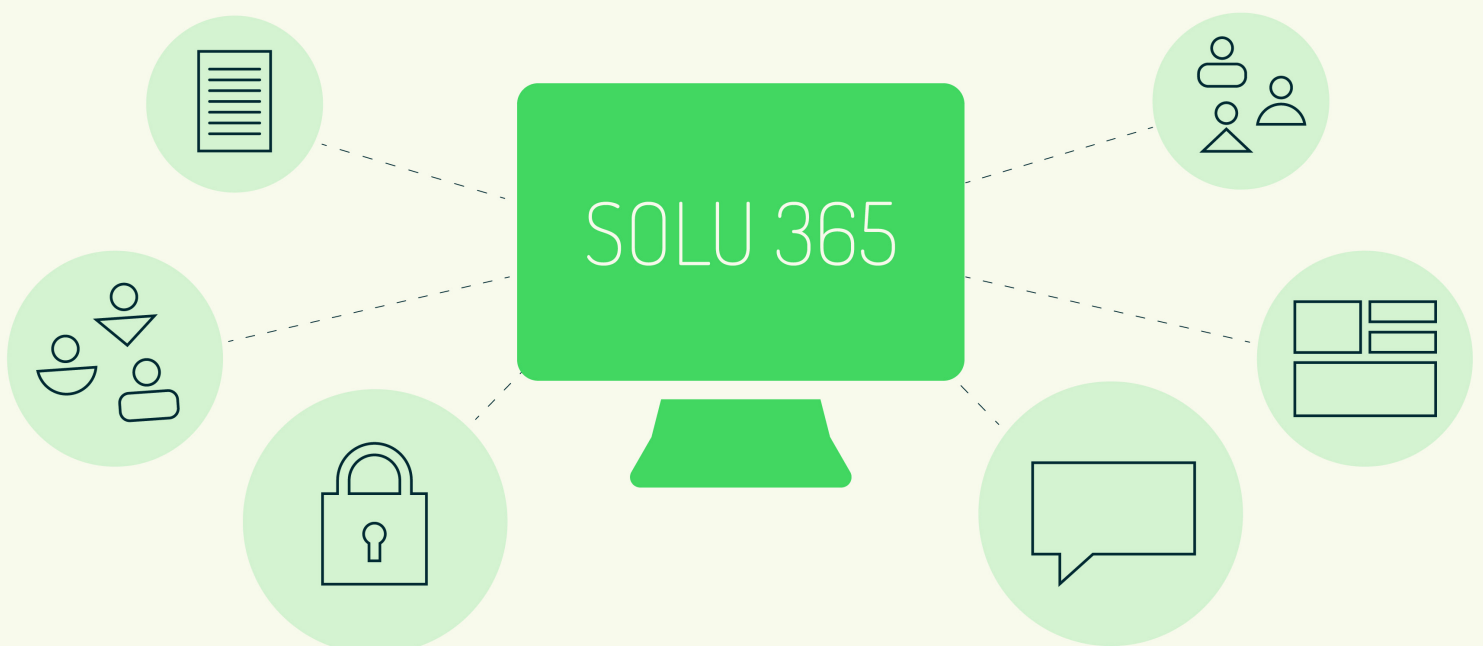


Speed up work and make it easier for users and your organization with Solu 365

With Solu 365, information management can:

- Create use case-based Teams groups and enhance group lifecycle management
- Manage the external sharing of sensitive documents at the Teams group level
- Use real-time templates for updating use cases
- Monitor orphan and inactive user groups via the reporting view
- Efficiently automate metadata into document libraries.

- Information management is improved with automatic metadata.
- Groups and data are no longer duplicated.
- Search of information speeds up and data discoverability improves.
- The transparency of information is improved, and consistent, goal-oriented information work is made more efficient.
- The organization's information security and lifecycle manageability are improved.



With Solu 365, end users can:

- Create ready-made, pre-defined Teams groups that meet all the requirements of the organization with an easy and user-friendly form
 - Channel structures
 - File folder structures
 - Templates for files
 - Task containers
- Browse all Office 365 and Teams groups in your organization from an accurate portfolio view with systematic sorting
 - Creating an overview is easier
- Benefit from improved search filters for organizing metadata
- Manage Teams groups with simple functions from the portfolio view

The screenshot shows a form titled 'Identity' with a 'Users' tab. The form contains the following fields:

- Name ***: Input field with 'Project xyz' and a help icon.
- Site url and group email ***: Input field with 'project-xyz' and a help icon.
- Description**: Text area with a help icon.
- Process**: Dropdown menu with a help icon.

In groups created with Solu 365, users can structure information and control how it is shared with specific users. An easy and simple form with instructions to guide the user through the steps clarifies the process for Teams groups and information management.

The screenshot shows a 'My Groups' portfolio view with a search bar and a table of groups. The table has the following columns: Title, Type, Process, ProjectName, ProjectNumber, Sharing, and EndDate.

| Title | Type | Process | ProjectName | ProjectNumber | Sharing | EndDate |
|--------------------------|----------------|-------------------|--------------------|---------------|----------|-----------|
| EXT-OD-Heinäkuun t... | Fixed-duration | Order-Delivery OI | Heinäkuun tapaht | 648392 | External | 31.7.2021 |
| MG-Kesäprojekti | Fixed-duration | Management MG | Kesäprojekti | 94823 | Internal | 31.8.2021 |
| EXT-CE-Kesän suunni... | Fixed-duration | Customer Engage | Kesän suunnittelu | 123123121-A | External | 1.9.2021 |
| EXT-SD-Kaupunkitap... | Fixed-duration | Service Developm | Kaupunkitapahtui | 748392 | External | 31.8.2021 |
| EXT-SD-Vaikuttava tii... | Fixed-duration | Service Developm | Vaikuttava tiimi | 234234234 | External | 4.7.2021 |
| EXT-SD-Projektinhalli... | Fixed-duration | Service Developm | Projektinhallintay | 745739 | External | 30.9.2021 |
| EXT-SD-Toimipaikan ... | Fixed-duration | Service Developm | Toimipaikan uudi | 37488 | External | 31.7.2021 |

Take effective advantage of Teams with a common management model for your organization

To prepare for the deployment of Microsoft Teams and the smooth use of the application, you should prepare by defining a management model for creating and naming Teams groups for lifecycle management with the appropriate security classification and archiving.

Establish Teams group management for the use cases defined for the organization

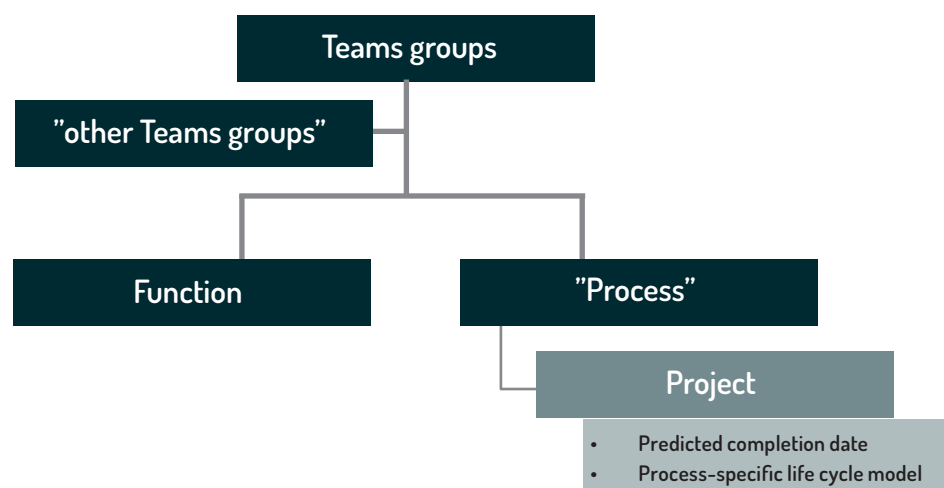
The automation of the Solu 365 tool is based on different use cases that determine the privacy settings of Teams groups, the sharing of information and documents externally and internally, and the permanence or timeliness of the group lifecycle. The definition of use cases is based on the needs of the organization and users.

Example of use case-based models for Teams groups

| Project team | Internal team | External team |
|--|--|--|
| <ul style="list-style-type: none">• Role-specific access to a group• Project process as tabs• Project document templates and project metadata in document libraries• Further development: task containers and tasks (Planner)• Further development: project reporting (Power BI) | <ul style="list-style-type: none">• Can only invite internal users• The name of the group as metadata for the group document library• Automatic group expiration | <ul style="list-style-type: none">• Can invite internal and external users• In the group naming practice, the prefix EXT is automatically set• The name of the group as metadata for the group document library• Automatic group expiration |

Among other things, the creation of groups and channels based on hierarchy is possible with the help of work group automation. Teams groups in projects can be automatically linked to a process and can be browsed, for example, in a function's Teams group on the Projects tab.

Example of a group work classification model



Secure the process of Teams groups creation

Solu 365 instructs users to select the correct settings for their groups. Sharing with users outside the organization is either allowed or permanently disabled, depending on the purpose and classification of each group, so that information and documents can be securely shared only with those who need to know about them.

Use case-based group templates can also be pre-defined with group channel structures as well as file folder structures, templates for files, Planner task containers, and OneNote notes.

- It is possible to create document templates, documents, and folders in a workgroup template. The columns in the Files view can be configured to meet the needs of, for example, project teamwork.
- Pre-defined containers and tasks can be created in the Planner. The Teams tab can be pre-configured for use.
- OneNote tab can also be created pre-configured for use.

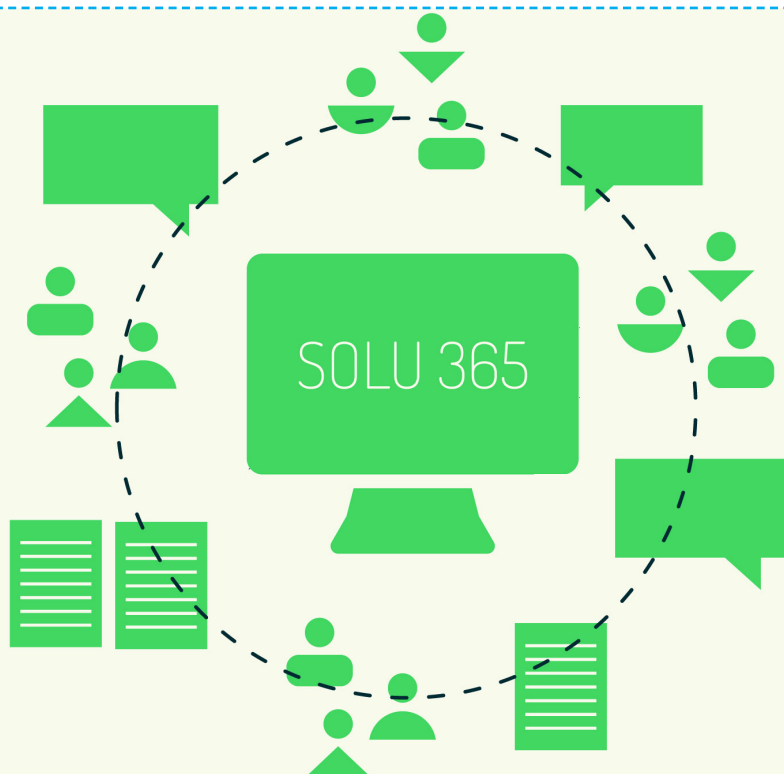
With the help of workgroup automation, a separate Teams group can be created for each supplier outside the organization, in which, for example, a private channel is automatically created for internal users of the organization.

Facilitate group lifecycle management with group archiving

The Teams group archiving feature in the Solu 365 Portfolio keeps information about active groups up to date. Archived groups do not appear in the Solu 365 Portfolio or Teams standard interface but can be easily restored.

Using Microsoft Azure's scheduled feature, Solu 365 notifies the workgroup in advance of the archiving date by sending an e-mail to the workgroup owner. Using the email buttons, the owner can choose whether to extend the group's lifecycle or allow it to be archived by date.

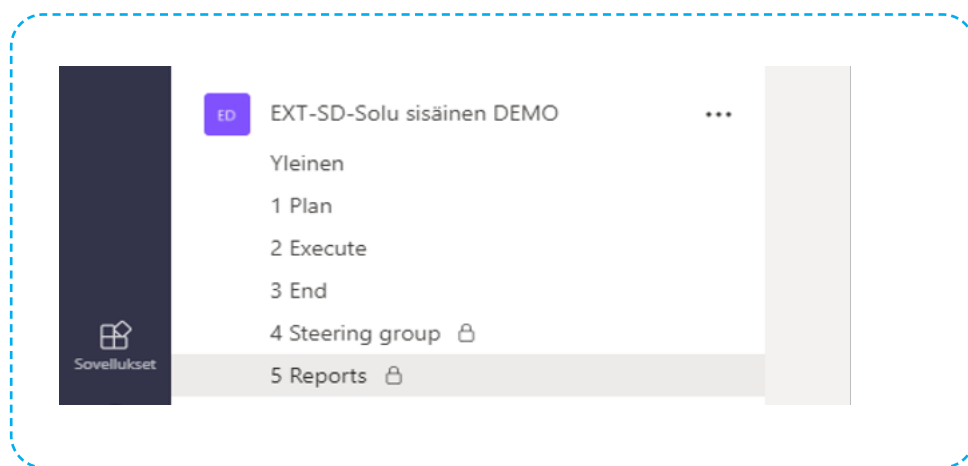
Metadata according to the lifecycle model can be defined when creating a project Teams group and can be updated during the project. The metadata can be, for example, a selection list and / or the planned end date of the project.



Define naming conventions to support the management model

Teams group naming conventions can be easily managed using the Solu 365 tool. Automating group naming logic ensures consistent channel structures based on the use case of the group.

For example, a group for external use starts with the symbol EXT in the beginning of the group name. The name SD = service development can then be specified in the name. For example, a group name can end in accordance with the naming conventions used throughout the organization.



Clarify metadata management with automation

Each document stored in the group's SharePoint document library is automatically assigned a group name and category as metadata without further action. The organization's unique way of parsing data is effortlessly stored as document metadata in a consistent manner.

Track the activity of Teams groups with the reporting function

Solu 365 provides the ability to track the number of groups, group activity, and users, such as external users. The reporting view also allows you to see where in each group an individual user is. Clear visual reports are implemented with Microsoft Power BI.

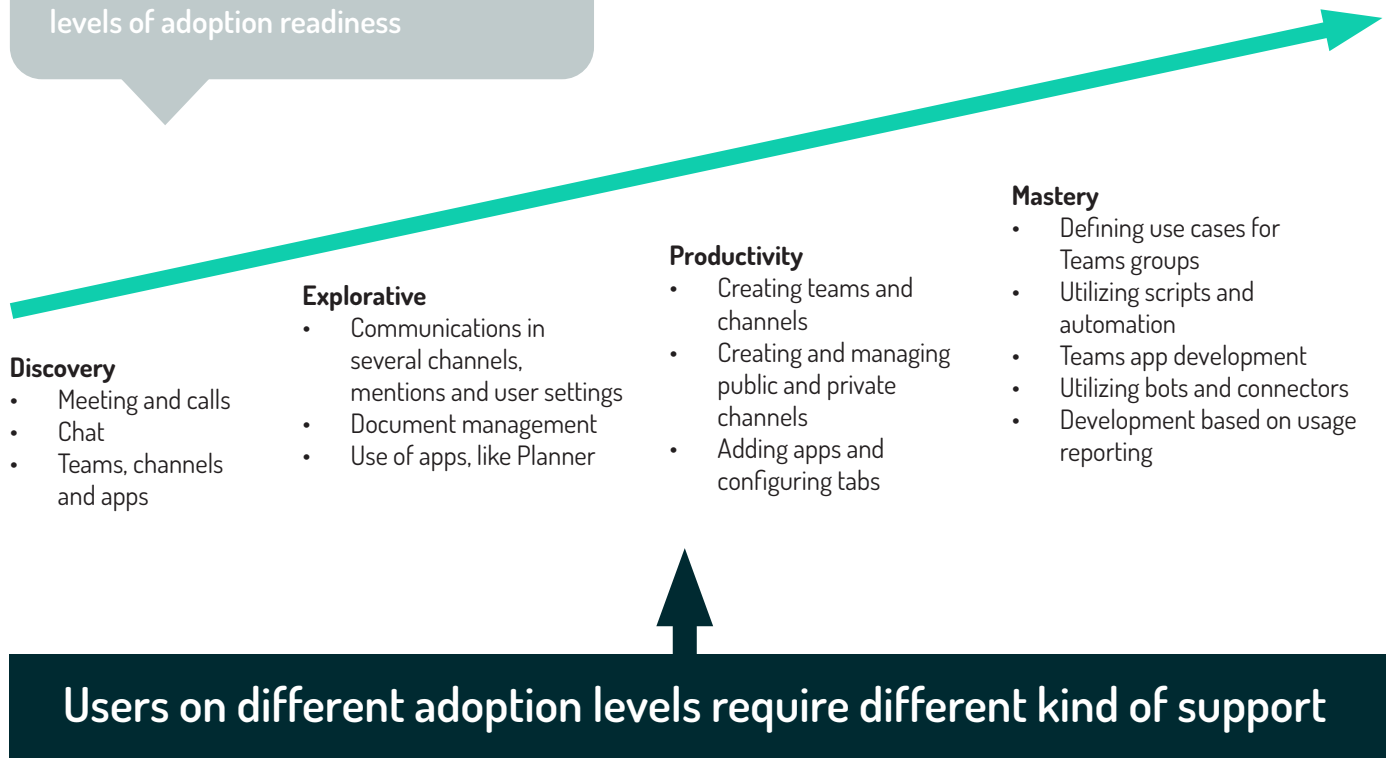
Monitor and manage guest users effortlessly

Allowing or blocking invitation of guest users is defined during the group creation process. In the user addition phase, guest users can be invited using the person's email address.

Visiting users can be removed from the Teams group, which can be updated so that visitor users cannot be invited if, for example, it is necessary to change the workgroup from external to internal and use the group's resources as a database.

Consider user proficiency levels when deploying Teams

Typically, end users are found on all levels of adoption readiness



The deployment and smooth use of Teams can be solved by the continuous development of personnel's skills. The organization should consider a comprehensive deployment and training plan for Teams to support all users in achieving a certain level of expertise.

A successful delivery project of a technical solution with different needs for a change in operating methods requires a thorough survey and situation analysis:

- The needs, challenges, and goals of the organization to support remote work and virtual collaboration
- The real needs and pain points of the end users of the tools in the current work, the IT skills levels and the training and communication methods.

Checklist for smooth management of Teams and information management with workgroup automation

Secure information management on Microsoft Teams with workgroup automation

- Make your organization more committed, efficient, and productive, and protected from security issues with efficient and secure data processing.
- Leverage the fruits of collaboration, such as discussions, documents, to-do lists, and videos, for the common goals of your organization.

Boost your use of Microsoft Teams and Microsoft 365 with automation

- Make it easier for both users and IT personnel to manage Teams groups with automation in a user-friendly way and without compromising security.
- Facilitate communication and collaboration in Teams and Office 365 groups between internal and external organizations with automation.

Speed up work and make it easier for users and your organization with Solu 365

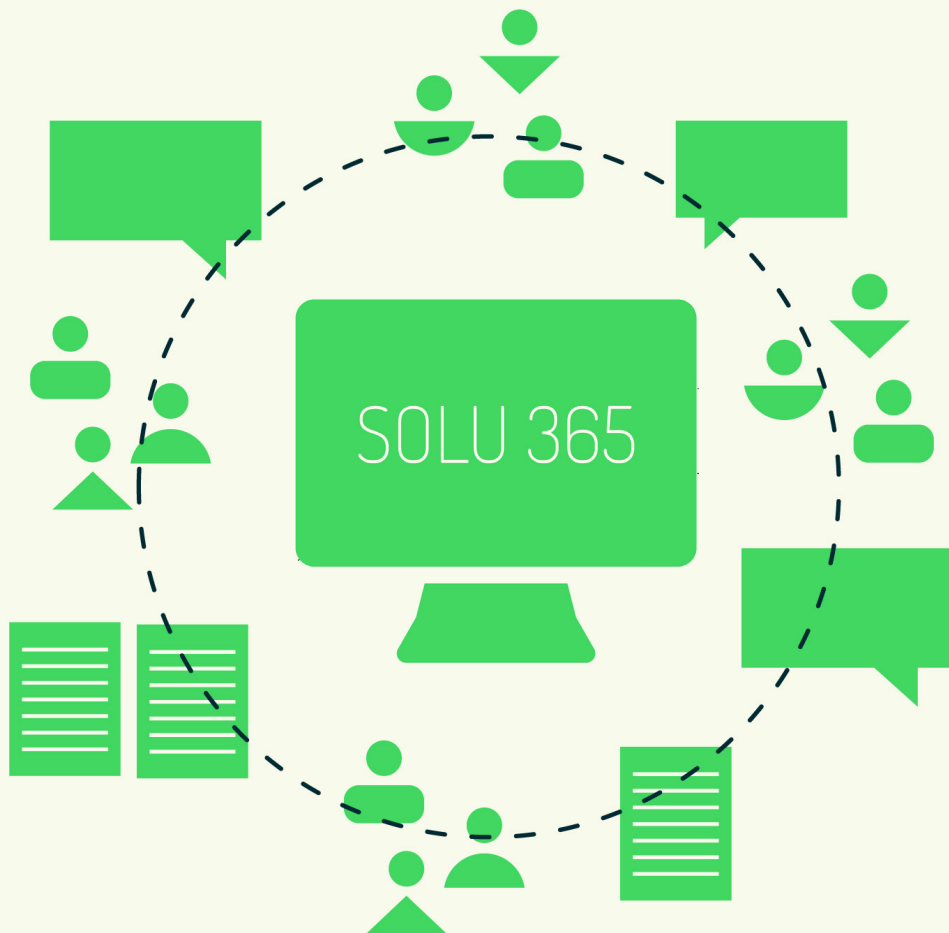
- Improve information management with automated metadata.
- Eliminate duplication of Teams groups and information from everyday life.
- Speed up information retrieval and improve data discoverability.
- Improve team-specific security with information in the right place for the right people.
- Improve the security of your organization when external users have limited access to groups.

Take effective advantage of Teams with a common management model for your organization

- Establish Teams group management for the use cases defined for the organization.
- Secure the process of Teams groups creation.
- Facilitate group lifecycle management with group archiving.
- Define naming conventions to support the management model.
- Clarify metadata management with automation.
- Track the activity of Teams groups with the reporting function.
- Monitor and manage guest users effortlessly.

Consider user proficiency levels when deploying Teams

- Consider the different user groups, each with their own needs for using the tool, developing their own IT skills, and different forms of training, from written instructions to online courses and training videos.



Contact us

If you would like to discuss more about this topic, please contact:

Solu Digital Oy

info@soludigital.fi

+358 (0)9 3154 6677

www.soludigital.fi