

# Join Your ERP and Microsoft Teams at the Hip (Part 1 of 2)

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12 - 1 PM Eastern Time

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2008

Envision IT built custom Extranet solution

2010



2012

Extranet User Manager (EUM) Installer created



Office 365 support

2014

2016



Azure B2B support

User-Centric EUM Login Teams, SPFx, and Flow

2017

Partner Program launched

2019

2009



2011

Productization of code base begins

2015

EUM Brand and Website launched



2018

EUM V4 Launched



2021

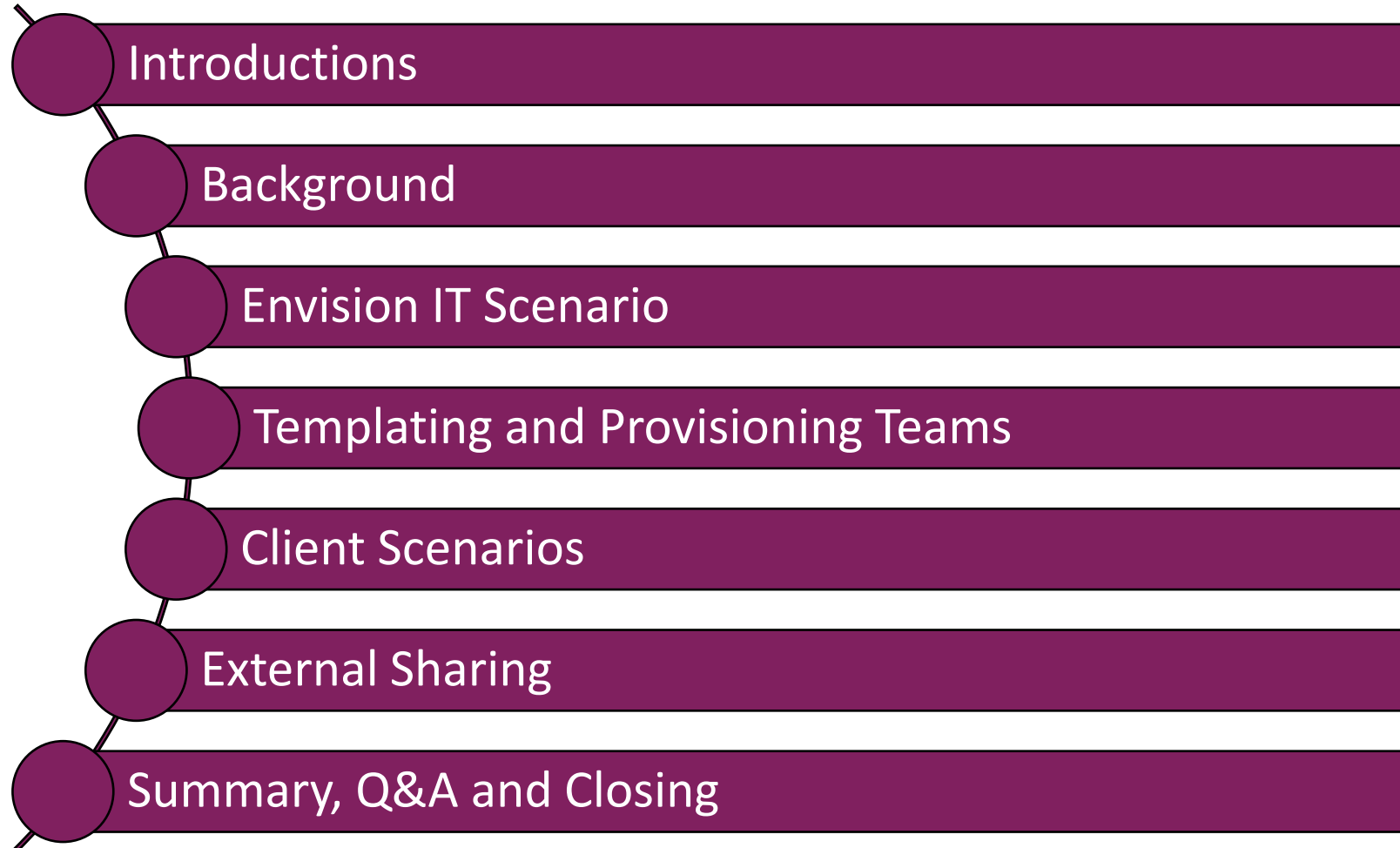
EUM Products Website Relaunched

# Customers around the Globe



100+ Customers Deployed Globally

# Agenda



# Microsoft Forms Poll



<https://bit.ly/3qhlvNy>

# Business Challenge

- **COVID and remote working has caused an explosion of Teams adoption**
- **Most of this has been unplanned**
  - No consistency between Teams or SharePoint sites
- **Self-service is important**
- **No one likes rules – don't force me to work in a certain way**

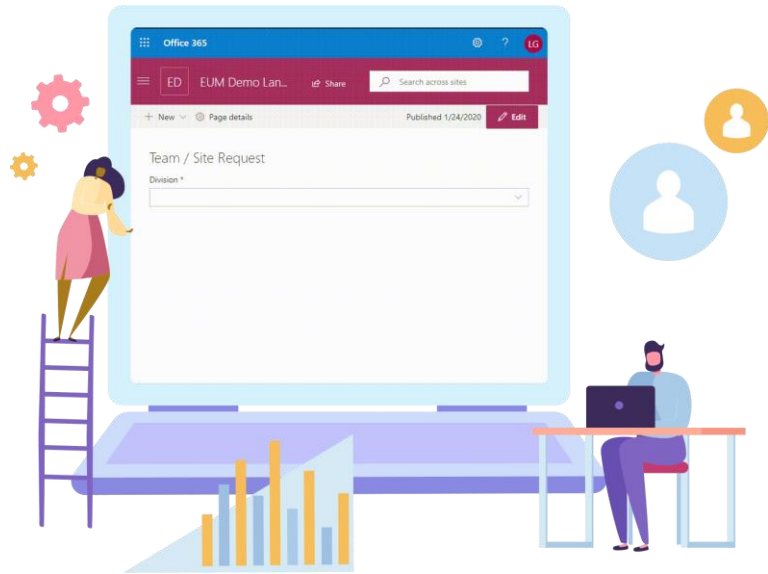
# When Creating a Team You Get



- **Microsoft Team**
  - General Channel
- **Microsoft 365 Group**
- **SharePoint Modern Team Site**
- **OneNote notebook**
- **Planner Plan**
- **Stream Group**



# Teams Governance, Templating, and Provisioning



EUM Open Source Solution  
<http://eum.co/teams>



Orchestry  
[www.orchestry.com](http://www.orchestry.com)

# Solution Highlights


- **Simple self-service request form**
- **Approvals only required if needed**
  - Requestor
  - Type of site
  - Site features such as external sharing
- **Templates applied to Teams, SharePoint, OneNote, Planner**
  - Doesn't force people to work a certain way
  - Consistency much more likely given people are not starting with a blank slate

Select Workspace

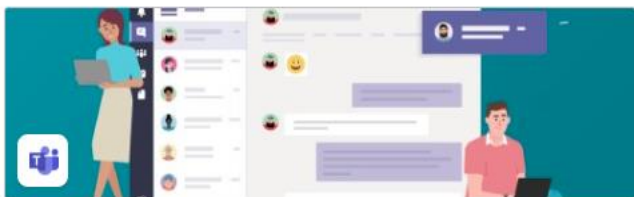
# Select Workspace

Continue →

- Select Workspace
- Customize
- Details
- Channels
- Permissions
- Confirm

 Filter

Sort by: **Featured** ▼



### Team

Communicate with your colleagues in real time by creating a Team that combines chat, documents, events and meetings through the Microsoft Teams interface.



### Team Site

Share documents, have conversations with your team, keep track of events, manage tasks, and more with a site connected to an Office 365 group.



### Communication Site

Publish dynamic, beautiful content to people in your organization to keep them informed and engaged on topics, events, or projects.



### Project Workspace Template

This Workspace provides all the features need to manage a project including tasks, documents, project contacts and communications.



# Next Challenge

- **Creating a Team or Channel is often part of a bigger business process**
- **Teams may not be the system of record**
- **What does a “Team” and “Channel” represent for your organization?**
- **How do we integrate this with our ERP, CRM, or LOB system?**

# Envision IT Scenario

- **Parent company of Extranet User Manager**
- **Microsoft Gold Partner**
- **Hundreds of clients and thousands of projects over the last 20 years**
  - Average of four projects per client, with up to 50
- **Line of Business Systems**
  - Microsoft 365
  - Dynamics 365 CRM
  - QuickBooks Online Accounting
  - In-house built time tracking and project management

# Envision IT Setup

What does a Team represent?	Client
What does a Channel represent?	Project
Private Teams?	No
Private Channels?	No
External Teams users?	Not generally
External SharePoint users?	Generally



OneNote



Client



Client Site



Planner



Stream

General

Project One

Project Two

General

Project One

Project Two



Shared Documents



General



Invoices



Project One



Quotes



Project Two



Private Documents



Budgets



Business Development



Quotes

# Envision IT Teams Governance

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



# External Sharing

# Sharing Options

- **Unstructured sharing of individual documents or folders through Microsoft 365**
- **Sharing of the entire SharePoint site through Azure AD B2B**
- **Making external users members of the Microsoft Team or Microsoft 365 Group**
- **Structured sharing through Extranet User Manager**

# Envision IT Client Sharing

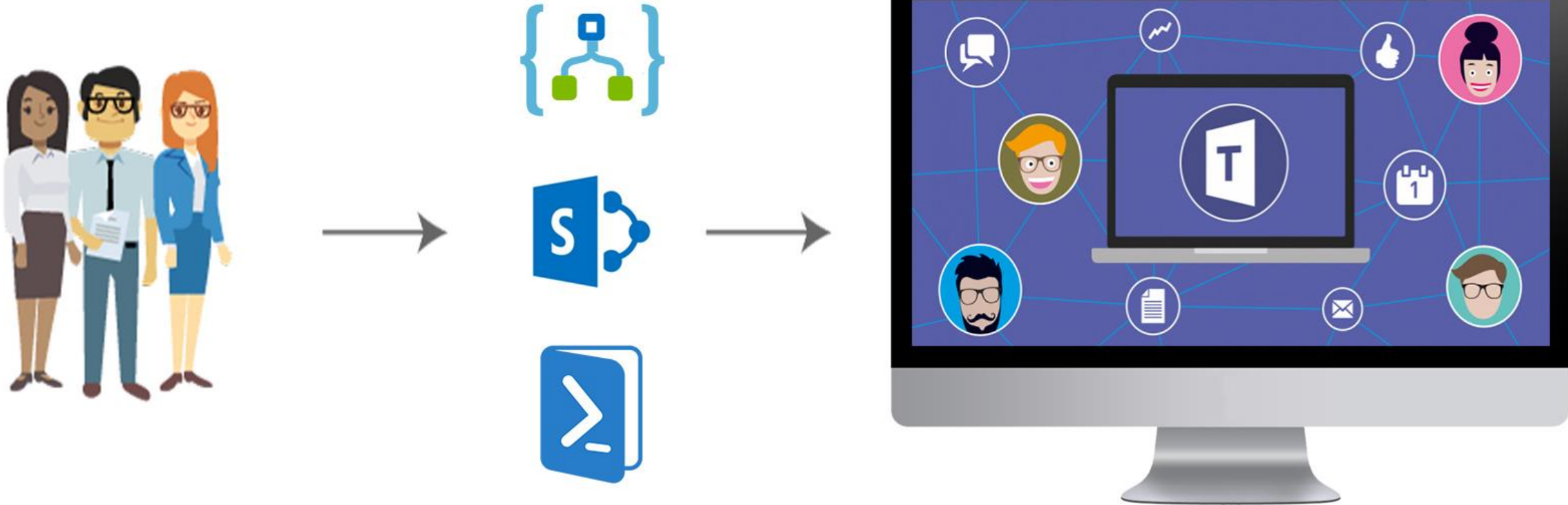
- **We share at the site level using Extranet User Manager (EUM)**
- **Setup a client group in EUM**
- **Set permissions in client site**
  - Everything shared read-only except Private Documents
  - Client Documents folder has edit rights
- **Add the Group Member web part to the site**
- **Invite client contacts to the group**

# Provisioning Teams Microsoft 365 Groups and SharePoint Sites

# Solution Requirements

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

# Supporting Technologies



# When Creating a Team You Get



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

# Requesting a Team, Microsoft 365 Group, or SharePoint Site

Team / Site Request

Division \*  
Demo

Site Template \*  
Modern Team Site

Title \*

Purpose

Alias

Public Group  
 Yes

Create Team  
 Yes





**Submit** Cancel

- **SPFx web part to make the self-service request**
- **Can be used from Teams or SharePoint**
- **Supports different Templates grouped under different Divisions**
- **Options for creating Teams, Groups, Sites, OneNotes, and Plans**
  - PnP template for SharePoint Site
  - Planner template for Buckets and Tasks
  - Templating of Tabs in Teams for above
- **Form fields are dynamically generated based on template content types**
  - Easy to add or change fields on the form – no programming required



# Sites List Web Part

Sites

 <b>Private Group - No Approvals</b>  This group is private and is not shown on the list page of all public groups. To join the group you need the invitation URL. Joining a group is done immediately with no approvals required.	 <b>Private Group with Approval</b>  This group is private and is not shown on the list page of all public groups. To join the group you need the invitation URL. Joining a group submits a request for approval before you are added to the group.	 <b>Public Group - No Approval</b>  This is a Public Group that anyone can join. It does not require approval.	 <b>Public Group with Approval</b>  This is a Public Group that anyone can request to join. The user will be notified via email once the request has been approved.
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- **Displays Sites from the Sites list**
- **Filters down to sites under a Parent URL**
- **Different views**
  - Tile
  - List
  - A – Z List

Demo Sites

- [Private Group - No Approvals](#)
- [Private Group with Approval](#)
- [Public Group - No Approval](#)
- [Public Group with Approval](#)

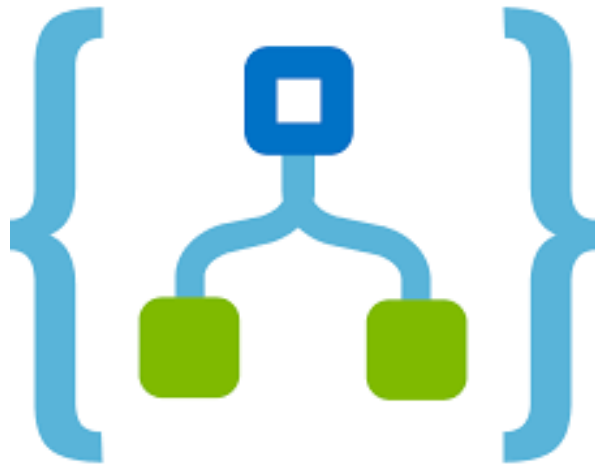
All Sites

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

—

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# Azure Logic Apps



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

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

# Project Documentation

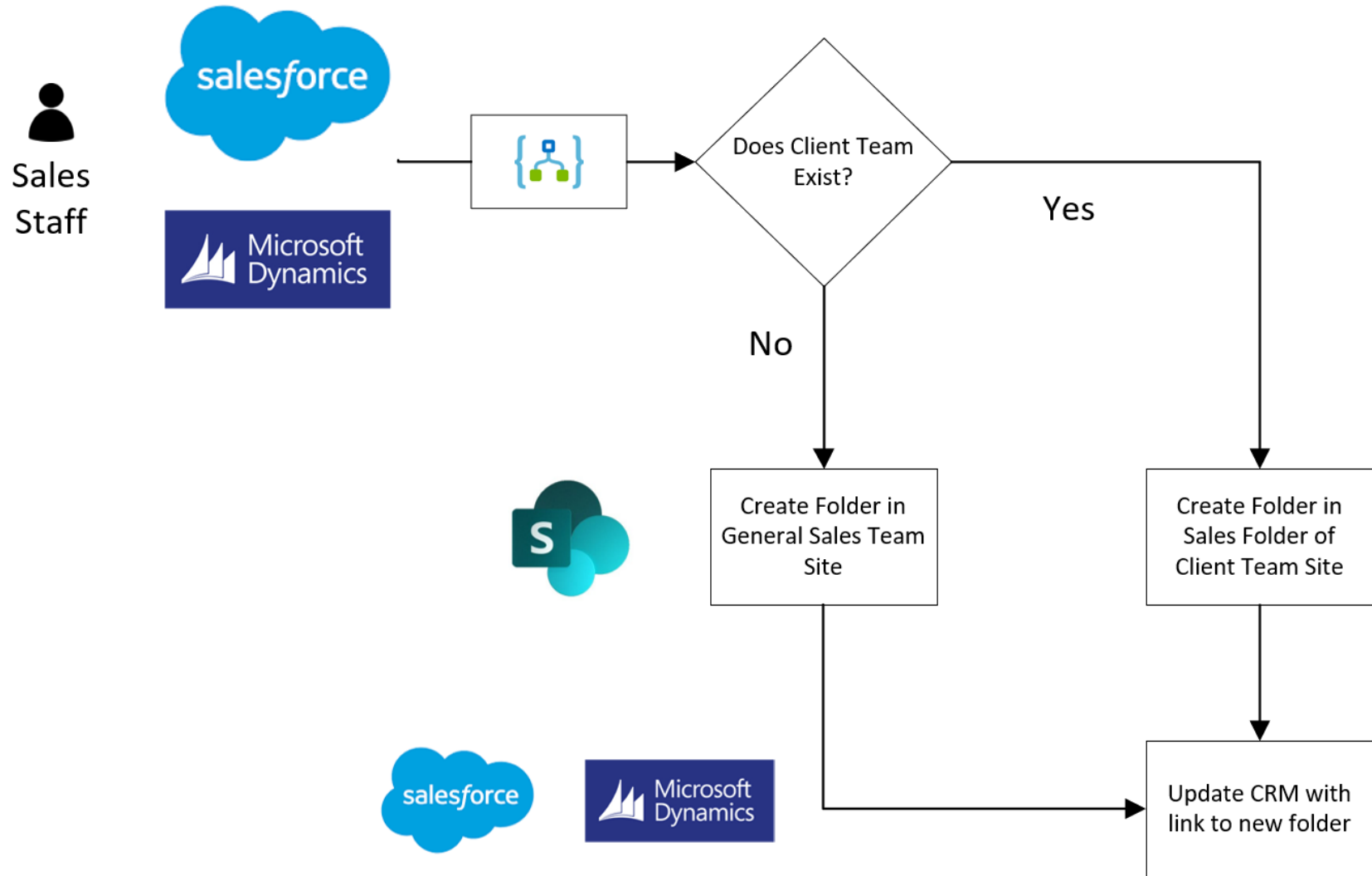
- **Source code is available on GitHub at**  
<https://github.com/petercarson/eum-sites/tree/V3>
- **Full consolidated whitepaper with step by step instructions**  
<https://www.extranetusermanager.com/resources/articles/teams-and-channels-governance-and-automation-whitepaper>

# Client Scenarios

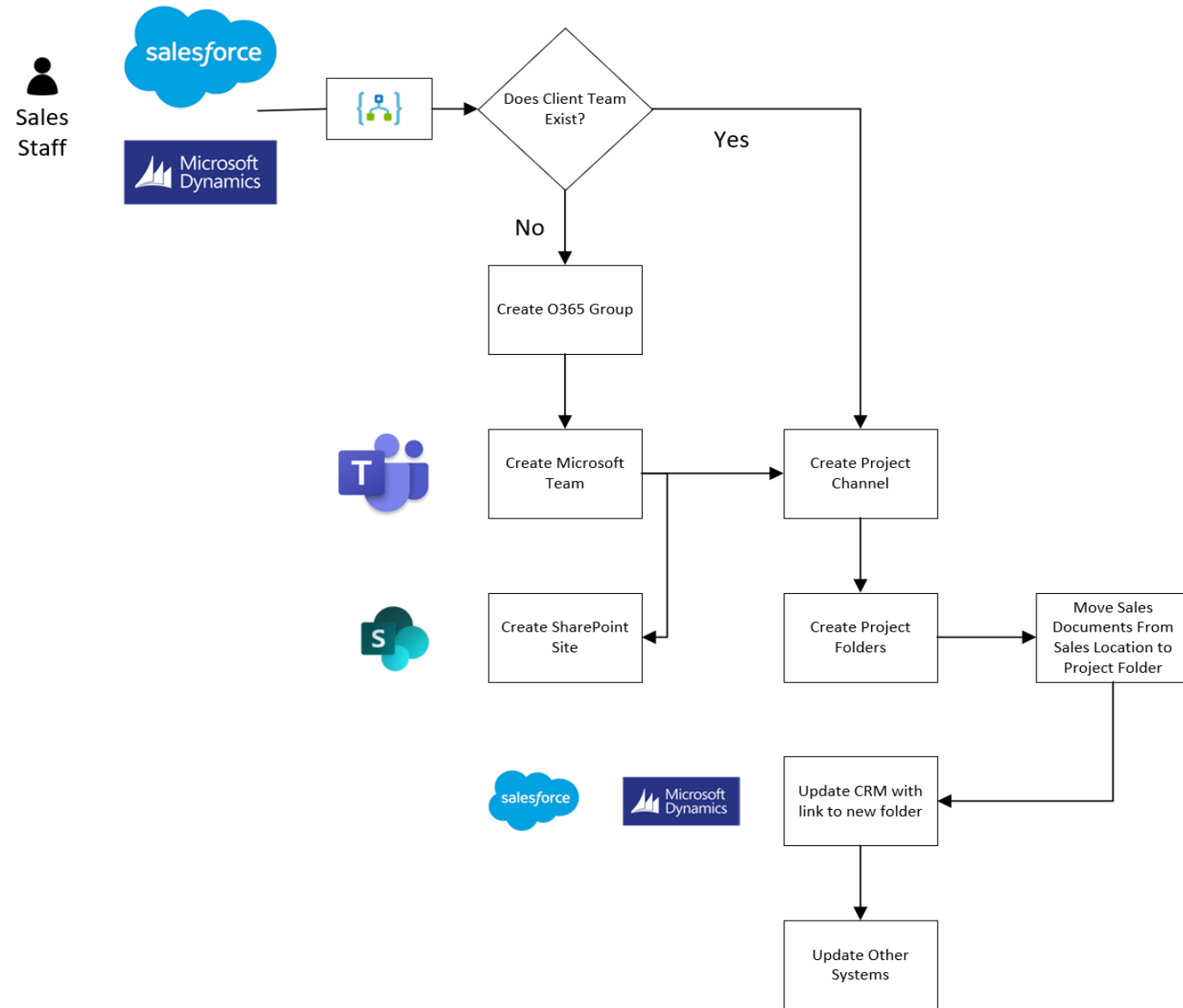
# Scenario One – Technology Consulting Firm

- **Built on EUM's Team and Site Provisioning open source solution**
  - <http://eum.co/teams-provisioning>
- **Governance around the request, approval, and provisioning of Microsoft Teams and SharePoint sites**
- **Azure Logic Apps workflow**
- **Premium connectors to Azure Automation and Salesforce**
- **No approvals required**

# New Opportunity



# Closed Opportunity

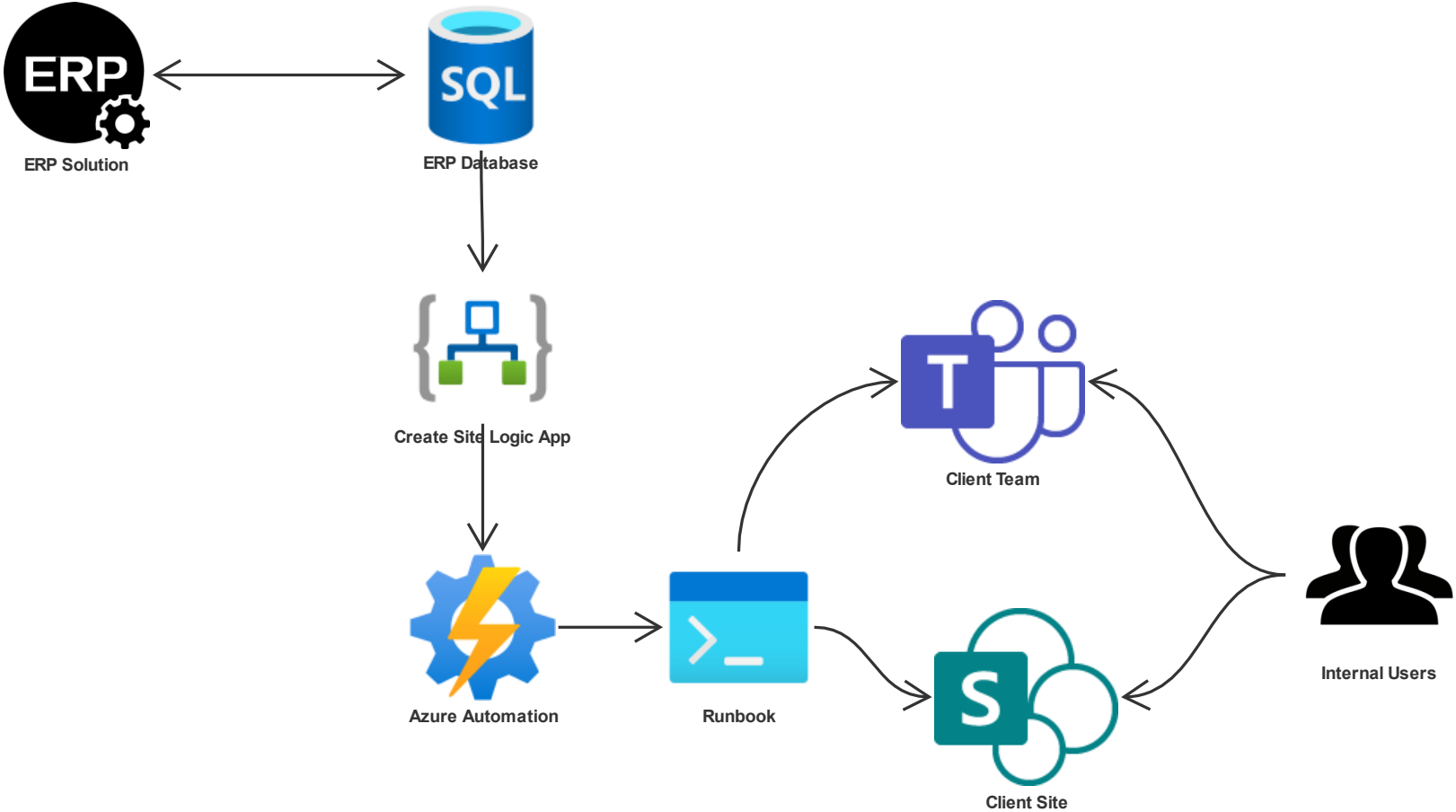


# Scenario Two – Architectural Firm

- **Built on EUM's Team and Site Provisioning open source solution**
  - <http://eum.co/teams-provisioning>
- **Governance around the request, approval, and provisioning of Microsoft Teams and SharePoint sites**
- **Directly integrated into their Enterprise Resource Planning solution**
  - **When a new entity is created in ERP, a templated Team and SharePoint site are created immediately**
  - **Channels are created to represent Projects**
- **Azure Logic Apps workflow**
- **No approvals required**



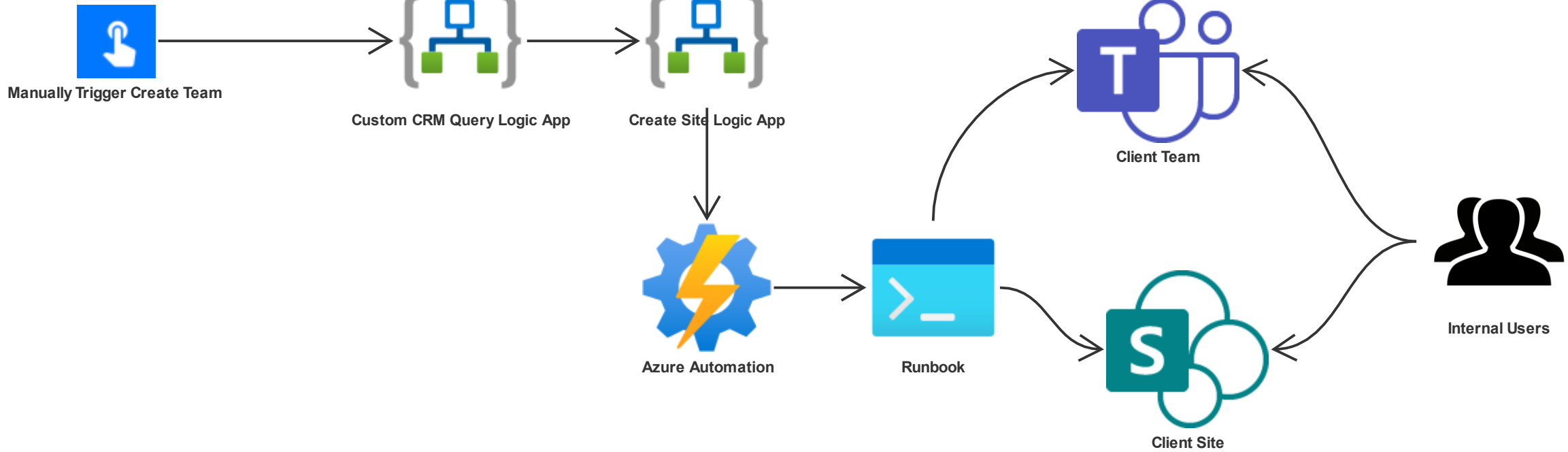
# Scenario One – Architectural Firm Teams Provisioning



# Scenario Three – Financial Services Company

- **Built on EUM's Team and Site Provisioning open source solution**
  - <http://eum.co/teams-provisioning>
- **Full account information is setup in Dynamics 365**
- **Create Team is manually triggered**
  - **Calls a Logic App to lookup account structure in Dynamics 365**
- **Account information in CRM determines underlying channel structure**
- **Also incorporated a file share migration to the new Teams structure**
- **Rich document set / metadata SharePoint structure**
- **Planning for document compliance Power BI dashboard**

# Scenario Three – Financial Services Company



# Wrap-Up Points

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

# Don't Forget to Register for Part 2!



## Join Your ERP and Microsoft Teams At The Hip - Technical Deep Dive (Part 2 of 2)

Feb 23, 2021 • 12-1 PM EST

This webinar is part two of a webinar series on joining your ERP and Microsoft Teams. Part 1 is the Join Your ERP and Microsoft Teams At The Hip Webinar.

<https://www.extranetusermanager.com/resources/events/webinar-2021-02-23-join-your-erp-and-microsoft-teams-at-the-hip-part-two>

# Open Source Updates

- **Updated to use latest version of PnP PowerShell**
  - <https://github.com/pnp/powershell>
- **Uses Azure RunAs service principal for authentication**
  - Improved security
  - No need for user accounts with MFA disabled
- **Packaged in an ARM Template for easy deployment**
- **Simplified architecture**
  - No API to deploy
  - Request webpart POSTs directly to Logic App securely
  - Hidden sites managed through item level permissions against Microsoft 365 Group's Azure AD group

# Upcoming Series – Forms and Workflows



## Building Employee Self Service Forms with Microsoft 365 (Part 1 of 3)

March 9, 2021  
12 pm – 1 pm EST



## How to Build a Microsoft Forms Leave Request (Part 2 of 3)

March 23, 2021  
12 pm – 1 pm EST



## How to Build an HTML Self Service Expense Form (Part 3 of 3)

March 25, 2021  
12 pm – 1 pm EST

Register for all upcoming events at <http://eum.co/resources/events>

# Upcoming Series – Secure Development and SDLC



**Strengthening Your Development Practices with Azure AD (Part 1 of 2)**  
April 20, 2021  
12 pm – 1 pm EST



**Microsoft 365 SDLC Best Practices (Part 2 of 2)**  
May 4, 2021  
12 pm – 1 pm EST

Register for all upcoming events at <http://eum.co/resources/events>



# Additional Webinars



## **Compliance and Document Collection with External Parties**

April 8, 2021  
12 pm – 1 pm EST



## **Integrating Multiple Planner Boards into a Power BI Dashboard**

May 20, 2021  
12 pm – 1 pm EST

Register for all upcoming events at <http://eum.co/resources/events>

# Thank you!

## Questions?

