



2021

SharePoint, Teams and Viva!

Creating a Modern Teams-First Employee Experience Intranet

Module 1: Team and Site Design

Speaker: Geoff Ables



LISTEN



UNDERSTAND



KNOW



CONNECT



C5insight

Creating a Modern Intranet

Module 1: Teams and SharePoint Site Design



START WITH A TEAM

Creating and Working With Microsoft Teams



DESIGNING TEAM SITES

Configuring the Sites Behind Your Microsoft Teams



WORKING WITH HUB SITES

Creating Hubs and Associating Child Sites



CREATING YOUR HOME SITE

Setting up a Site as Your Organization's Intranet Home



START WITH A TEAM

Creating and Working With Microsoft Teams

CREATING A TEAM

A soccer ball is shown hitting a goal net. The background is a dark green color with a white hexagonal pattern, resembling a soccer field or a goal net. The soccer ball is white with black hexagonal panels. The goal net is white and is partially visible on the left side of the image.

- Create 2 Project Teams
 - Use the “Manage a Project” Template
 - Team 1: Digital Employee Experience Planning
 - Team 2: Dynamics 365 Cloud Migration

Walk Thru – 2:16

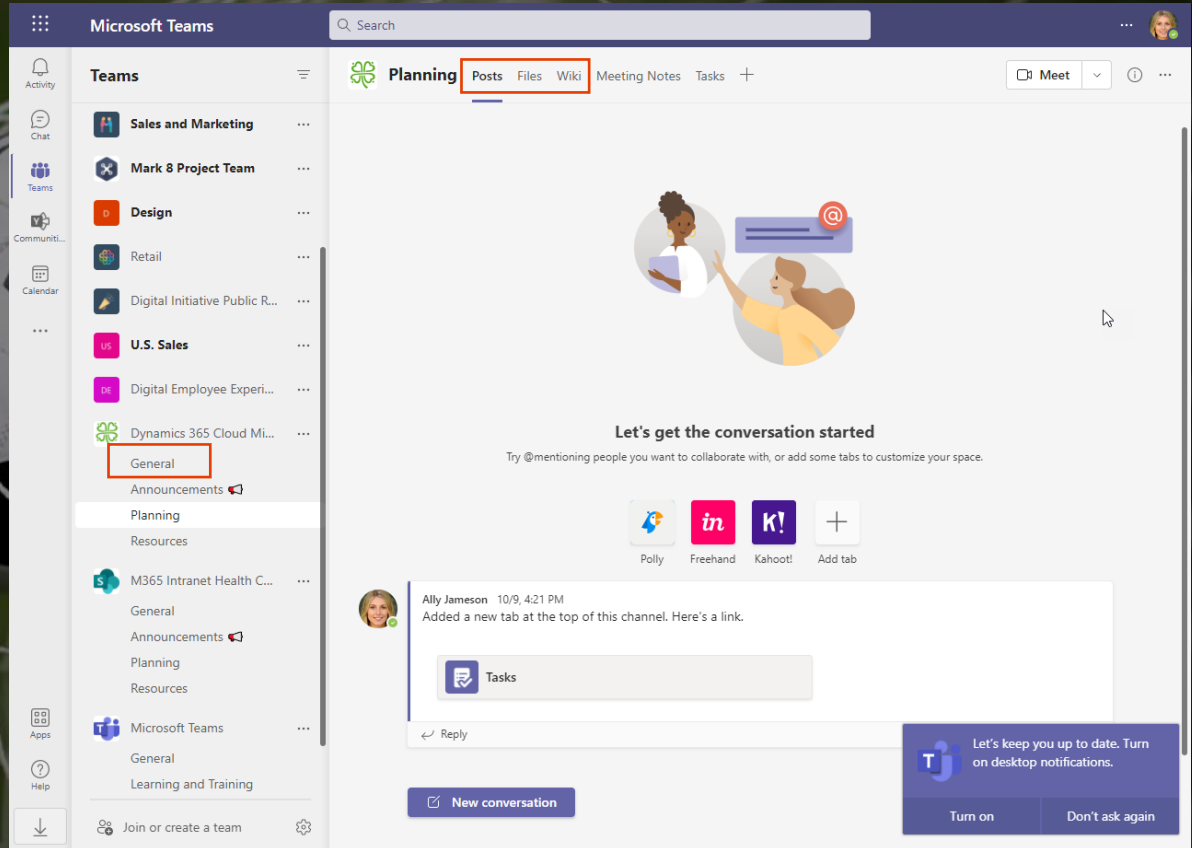
ABOUT TEAMS

Team

- A container for channels
- Every team gets a “General” channel

Channel

- Every channel gets a Posts, Files and Wiki tab
- Posts are where conversations take place
- Files tab is SharePoint (channels are folders)
- Wiki tab can be deleted



TAILORING YOUR TEAMS

A soccer ball is shown hitting a goal net, with the net's hexagonal pattern visible in the background. The scene is dimly lit, with the ball and net being the primary focus.

- Sync channels / folders
- Show hidden channels
- Every team gets a “General” channel
- Team picture
- Setting up a OneNote
 - Inverse date sequence to make finding recent notes easier
- Adding Tasks by Planner and To Do

Walk Thru – 4:23

PRO TIPS

A soccer ball is shown in the process of hitting a goal net. The ball is white with black pentagonal panels. The net is white and has a hexagonal pattern. The background is a dark green field.

- Your organization may have turned off ability to create Teams – Ask Your Admin
- Use Images
 - Teams Pictures
 - Emoji's in channel names
 - Windows Key + “.”
 - Our brains process images more efficiently than words, so this can be really helpful for quickly finding teams and channels



DESIGNING TEAM SITES

Configuring the Sites Behind Your Microsoft Teams

SHAREPOINT SITE NAVIGATION

- Open the Team in SharePoint
- Navigating the SharePoint Site
- Folder Updates Don't Sync to Channels
- Outlook Groups and Conversations
- Editing SharePoint Navigation
 - Removing Links
 - Moving Links
 - Creating Sub-Links
 - Adding Links (Planner)

Walk Thru – 3:46

SHAREPOINT PAGE DESIGN

- Working With: Sections, Columns, Web Parts
- Simplifying our Site Home Page
- Adding the Planner Web Part
- News Web Part
 - Reformatting
 - Creating a News Post
 - Creating a News Post Template

Walk Thru – 7:52

SHAREPOINT SITE TEMPLATES

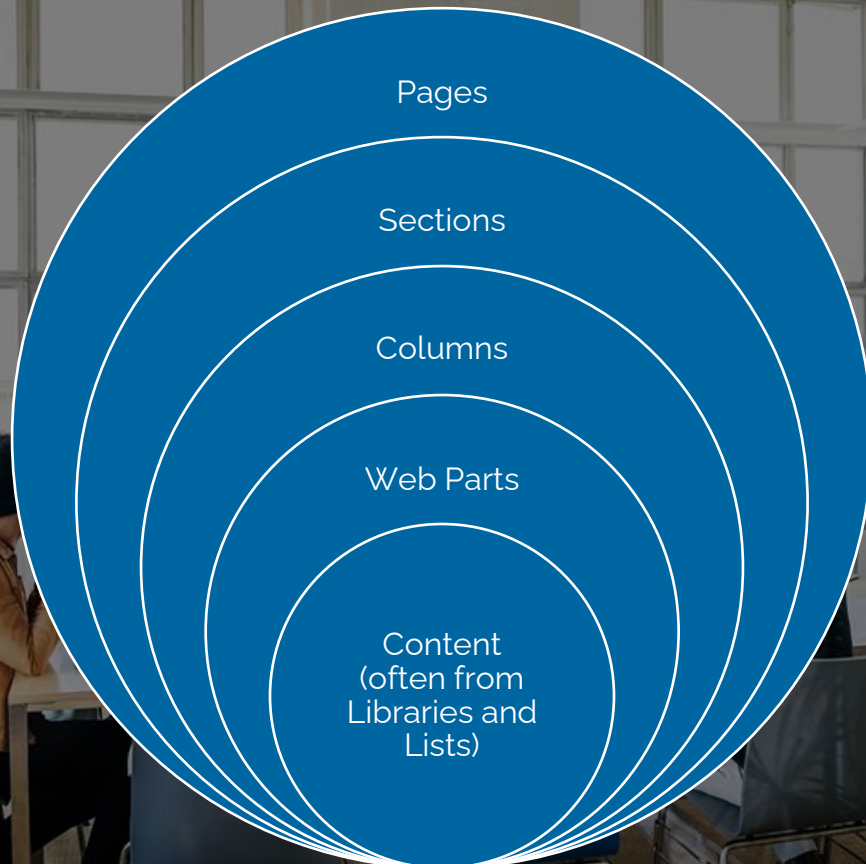
- Previewing Templates
- Selecting and Understanding a Template

Walk Thru – 4:33

SHAREPOINT SITE TEMPLATES

- Our Template Included
 - Faux Content
 - Hero Web Part
 - Microsoft Lists
 - News Templates
 - Event Calendar
- You can add/remove anything after selecting the Template (just like when we designed a site from the base template)

SHAREPOINT SITE HIERARCHY



PRO TIPS

- Theme colors can be further customized – Ask an Admin



WORKING WITH HUB SITES

Creating Hubs and Associating Child Sites

HUB SITE LAYOUT



- Creating the Project Management Office Home (PMO)
- Site Branding – color, thumbnail, logo
- Navigation – megamenu or cascading
- Add a Document Library
- Creating a Page Layout
 - Delete all and start from scratch
 - Add sections: full width, standard and vertical sections
 - Section colors
 - Adding web parts
 - Images
 - Hero
 - News
 - Events
 - Sites
 - Highlighted Content

Walk Thru – 6:12

DESIGN BEST PRACTICES



- Plan your information architecture
 - What information goes where?
 - Sites > Libraries > Folders
 - Teams vs SharePoint vs OneDrive
 - “Site Map” = “WorkSpace Map” (hierarchical listing of sites)
- Design your pages
 - At least the home page for each site
 - Home
 - Templates: Departmental, Team (by Type)
 - Sections, Columns, Web Parts

CONVERT TO HUB SITE



- M365 Admin Center > SharePoint Admin Center
- Active Sites > Find the Site
- Hub > Register as a Hub Site
 - Hub Site Association Permissions

Walk Thru – 1:23

ABOUT HUB SITES



- Not a formal part of the Teams/SharePoint Hierarchy
- Binds multiple “associated sites” to a “hub”
- Can share
 - Theme/branding
 - Navigation
 - Search
 - Respects security of each associated site
- Not to be confused with legacy “Sub-Sites”

ASSOCIATING SITES TO THE HUB



- Add some video files to our example Teams
- Site > Gear > Site Information > Hub Site Association
- Associated Sites Impacts
 - Branding
 - Navigation
 - Search

Walk Thru – 2:02

CONFIGURING HUB SITE



- Prepare
 - Gather some links (PMO library, PMO Mission article, Project Management Academy)
- Gear > Hub Site Settings
 - Logo, Hub Name, Associated Site Approval
 - Configuring Site Navigation vs Hub Site Navigation
- Working with Megamenu Navigation
- Configuring the Web Parts
- Sharing Associated (Child) Site Content:
 - News, Events, Sites, Highlighted Content

Walk Thru – 10:18

AUDIENCE TARGETING



- Navigating to Associated (Child) Sites
- Audience Targeting
 - Enabling
 - Audience to Target

Walk Thru – 2:40

PRO TIPS



- A SharePoint Administrator can turn off the ability for a user to create a new Site
- At present there is no option to “display all associated sites” automatically in navigation
- Logo Dimensions
 - Site Logo - 192x64
 - Site Thumbnail - 64x64
 - Extended Layout Logo - 300x64
- Types of Sites
 - Team Sites
 - Communication Sites
 - Hub Sites (can be a Team or Communication Site)
 - Home Site (only 1 per organization)
- Hub-to-Hub Associations are Now Available



CREATING YOUR HOME SITE

Setting up a Site as Your Organization's Intranet Home

CREATING A HOME SITE

A silver key and a green house-shaped keychain are positioned on a wooden surface. The key is on the left, and the house-shaped keychain is on the right. The house has a heart-shaped cutout in its center. The background is a textured wooden surface.

- Setting a Site to Home Site
 - Copy URL
 - M365 Admin Center > SharePoint Admin Center
 - Settings (Gear) > Home Site
 - Paste URL > Save
- Global Navigation
 - Home Site
 - Gear > Global Navigation
 - The SharePoint App Bar

Walk Thru – 2:31

PRO TIPS

A silver key with a green paper cutout of a house shape attached to its ring, set against a wooden background. The key is positioned diagonally from the top left towards the bottom center. The green paper cutout is a simple house shape with a heart-shaped hole in the center, and it is attached to the key's ring. The background is a textured wooden surface.

- Home Site Allows You To
 - Search content across your intranet
 - Official source for organizational news
 - Enable global navigation to the SharePoint App Bar
 - Use the site for Viva Navigation in Teams
- Making Home your Root Site
 - [Modernize your root site - SharePoint in Microsoft 365 | Microsoft Docs](#)

MODULE 1: HELPFUL LINKS

A green four-leaf clover is positioned on the right side of the slide, resting on a dark, textured wooden surface. The clover's leaves are vibrant green and clearly defined against the background. The overall aesthetic is clean and natural.

- <https://lookbook.microsoft.com>
- [Apply and customize SharePoint site templates](#)
- [Guided Walkthroughs: Creating sites for your organization](#)
- [Get started creating SharePoint site designs and site scripts](#)
- [Change the look of your SharePoint site](#)
- [SharePoint site theming](#)
- [How to create and deploy a Modern SharePoint Theme with PowerShell](#)
- [Designing SharePoint sites with beautiful headers](#)
- [Target content to a specific audience on a SharePoint site](#)
- [Set a site as your home site - SharePoint](#)
- [Plan, build, and launch a home site for your organization - SharePoint](#)
- [Modernize your root site - SharePoint in Microsoft 365](#)
- [Legacy Page Transformation to Modern](#)



C5insight

Dynamics 365 | Power Platform | Microsoft 365
Digital Customer and Employee Engagement

geoff.ables@c5insight.com
704.802.7484



REFRESH & RECHARGE