Microsoft Teams

Power secure collaboration in Microsoft Teams

Tailored solutions built for government

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Disclaimer

Bring government employees, experts, and citizens together using apps in Microsoft Teams

Connect everyone with collaborative apps tailored for state and local government. Apps in Teams help everyone better meet the demands associated with meeting, collaborating virtually, and sharing documents between government employees, community supporters, and citizens.

Scenarios

- Onboard an individual
  - Create an individual onboarding plan.
  - Invite a support team made up of internal and external collaborators—(like coaches, officers, and staff).
  - Set and manage meetings.
- Empower individuals to participate
  - Give individuals visibility into their onboarding plan and process via a unified space for sharing and collaborating.

For each scenario

- Scenario vision
- Primary persona
- Scenario storyboard
- Solution design best practices
- Solution architecture

Scenario vision

Context

Coordinator Daniela works for the Department of Correction (DoC). Her primary role is to onboard qualified individuals into a release program.

Individual Aaron Buxton was recently qualified for the DoC release program and needs a personalized onboarding plan.

Current state

Coordinator Daniela kicks off a multi-step onboarding process to support Aaron.

⚠️ Daniela assembles the onboarding team, reaching out to other members of the DoC, Aaron's parole officer, community supervisors, and other external support staff. She relies on one-off phone calls and emails to bring everyone together.

⚠️ Daniela collects Aaron's onboarding documents and case information. She uses a combination of database searches, paper files, and information shared through 1:1 emails. As there is no official process, Daniela made up her own file system to keep everything together.

⚠️ Without a central, secure space to communicate and share documents, the onboarding team relies on text messages, phone calls, and even unsanctioned social or chat platforms to share information.

⚠️ Using ad-hoc, siloed communication, the team misses key updates and essential information. Continued errors and oversights cause Daniella to rework documents and result in a negative experience for Aaron.

Future state

**Coordinator Daniela** follows a standardized, secure process to onboard newly released individuals.

✓ Daniela opens an onboarding app in her Microsoft Teams workspace and quickly creates a new Team dedicated to Aaron's onboarding.

✓ She assembles Aaron's support team, including parole officers, community supervisors, etc. and invites them to a Teams site.

✓ To securely post updates, share information, files, and notes with Aaron and the onboarding team, Daniela creates a Teams channels to support different workstreams.

✓ Aaron's onboarding plan is set up in Teams! In a single dashboard view, Daniela can:
  - ✓ Assign team member roles and add/remove current members from the Team
  - ✓ Check channel meetings to make sure Aaron is scheduled for all steps in his onboarding journey
  - ✓ Schedule a new meeting with a customized task module, knowing it won't conflict with something already set up
  - ✓ Request a new meeting with Aaron
  - ✓ Chat 1:1 or 1:many with anyone added to the Team
  - ✓ Archive the Team when the onboarding process is complete

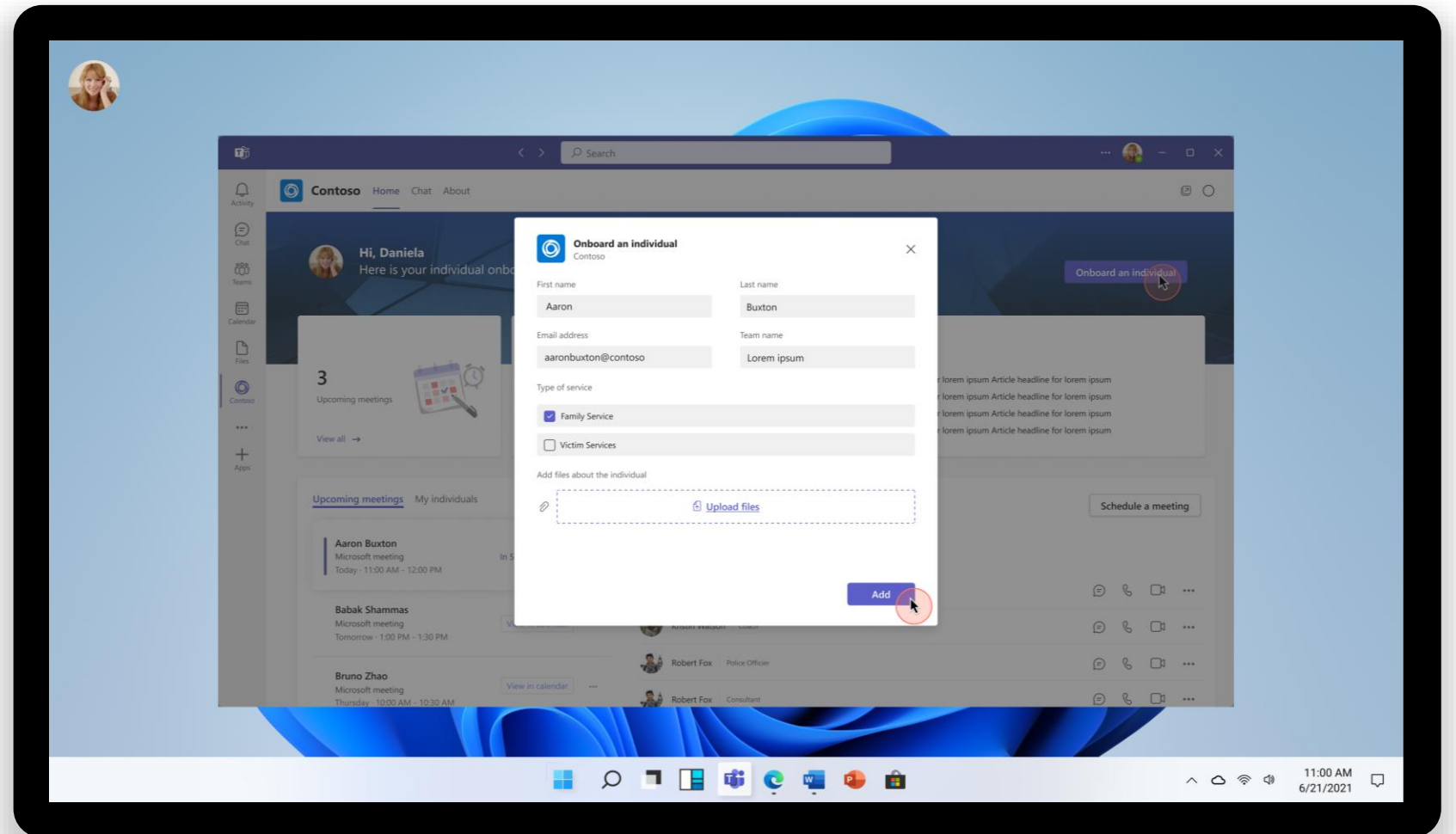Government/SLG teamwork solutions

Onboard an individual

Government – Onboarding an Individual

Track all active onboarding plans and easily create a new onboarding plan from a central, secure dashboard
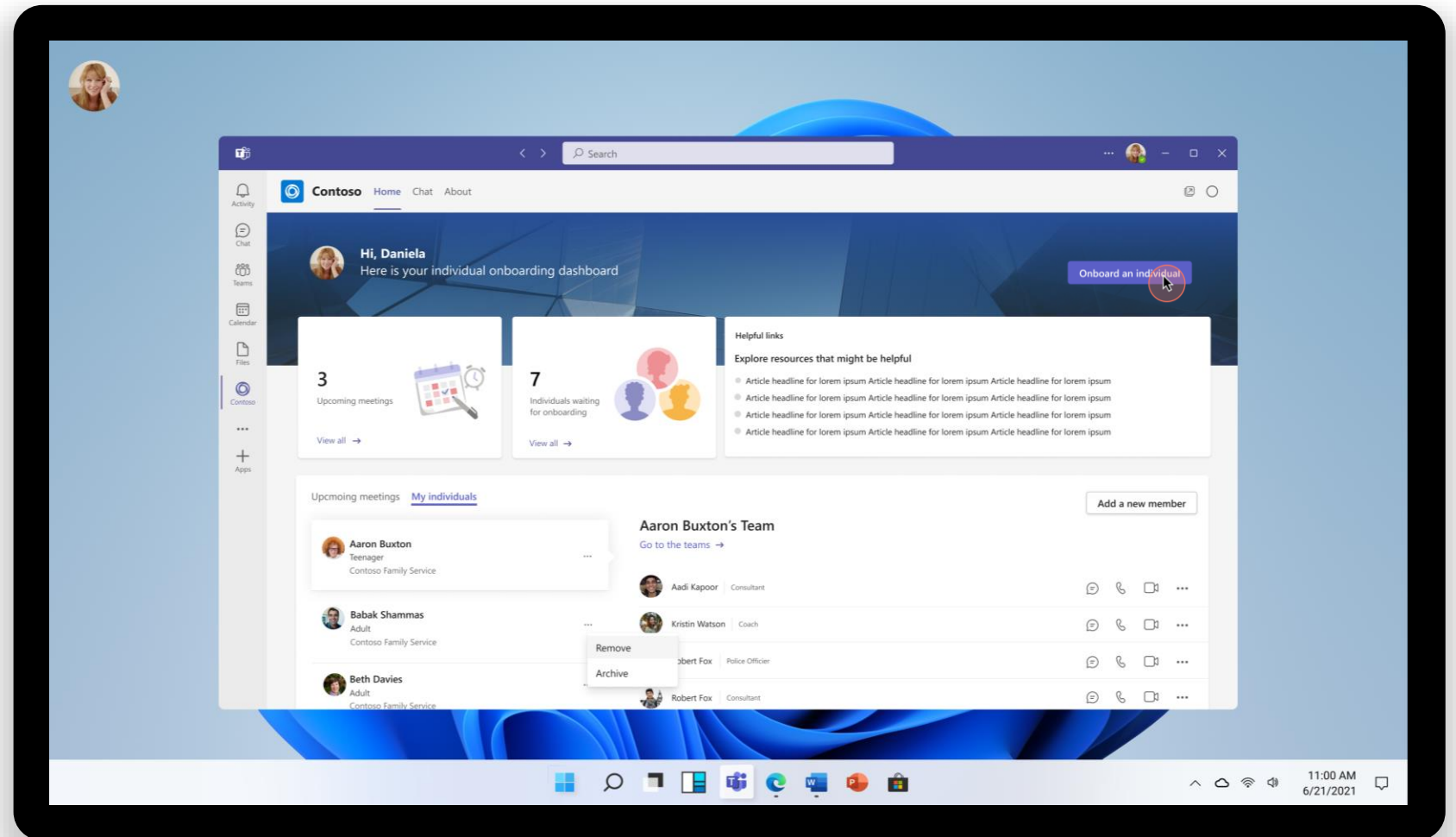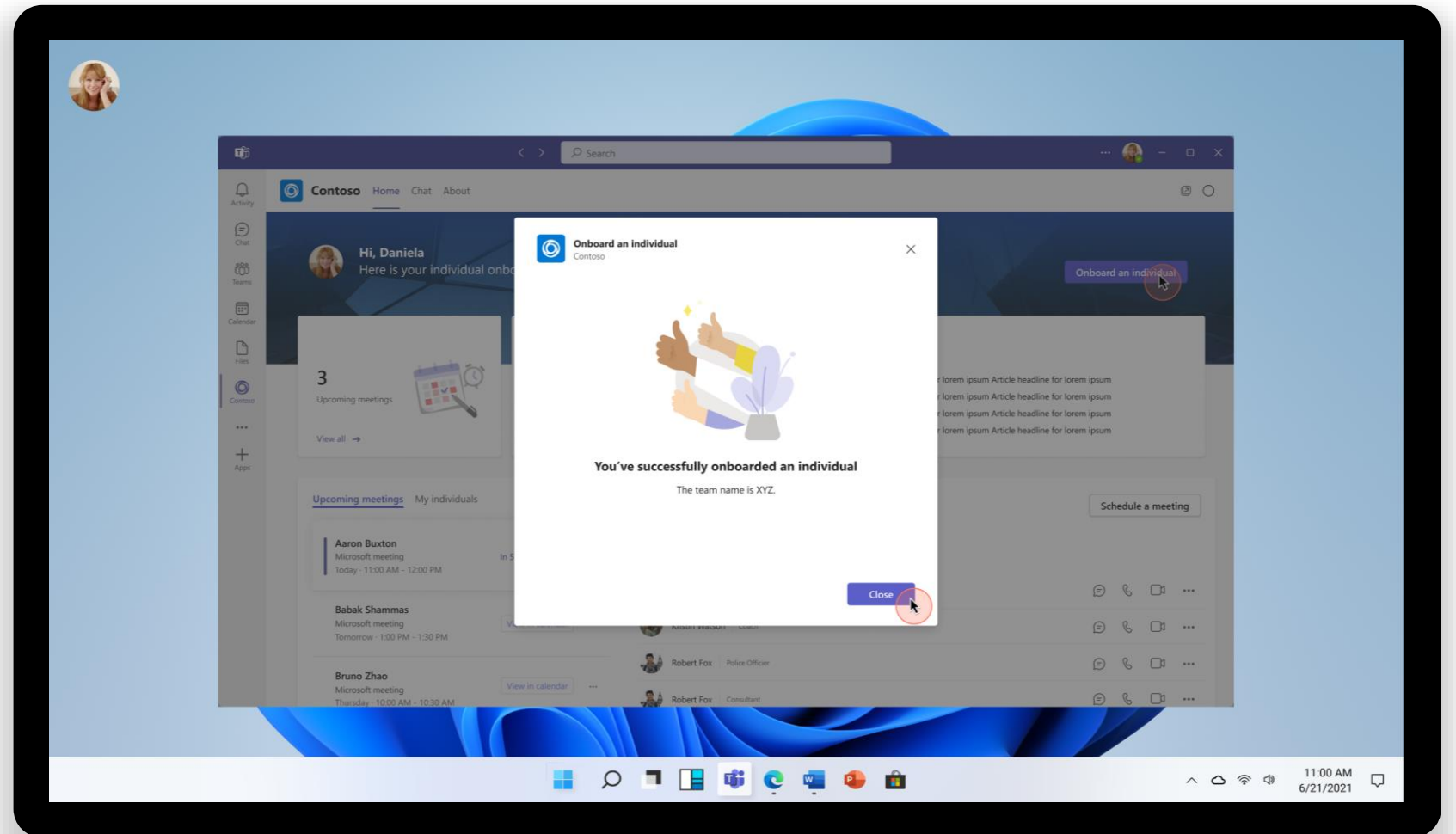
Government – Onboarding an Individual

Provide consistency across individuals and coordinators using preset, standardized fields
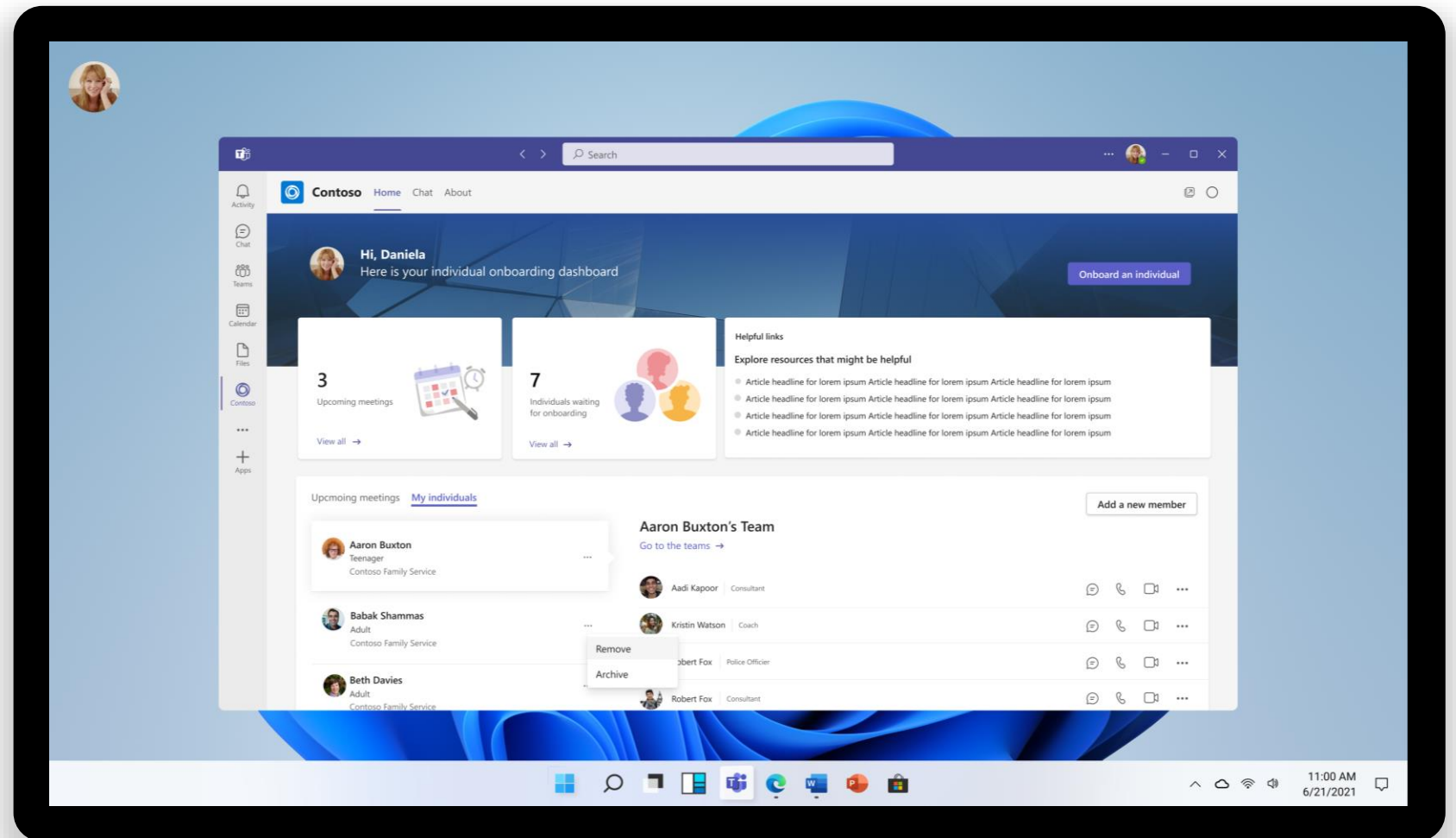
Government – Onboarding an Individual

Receive instant confirmation when a plan is created

Government – Onboarding an Individual

# Manage the entire support team from one dashboard

- Add the individual and support team as guest users. Once added, guests receive an email invitation that they must accept to access the onboarding plan.

- Assign team member roles.

Government – Onboarding an Individual

Help ensure the individual is set up for success

- **Schedule a new meeting**
- **Review their scheduled meetings**
- **Join a current meeting** on desktop, web, or on the go via the Teams app
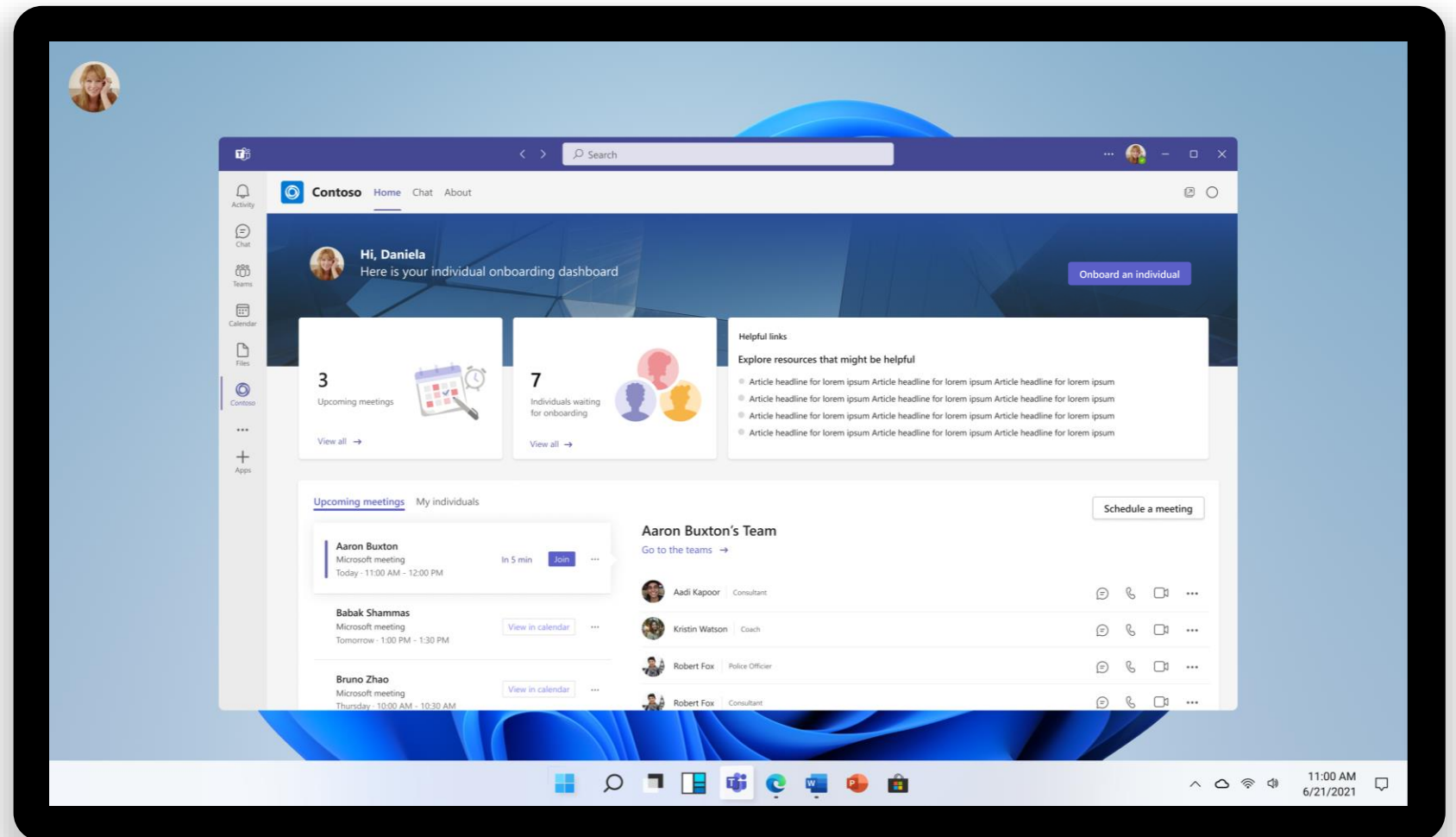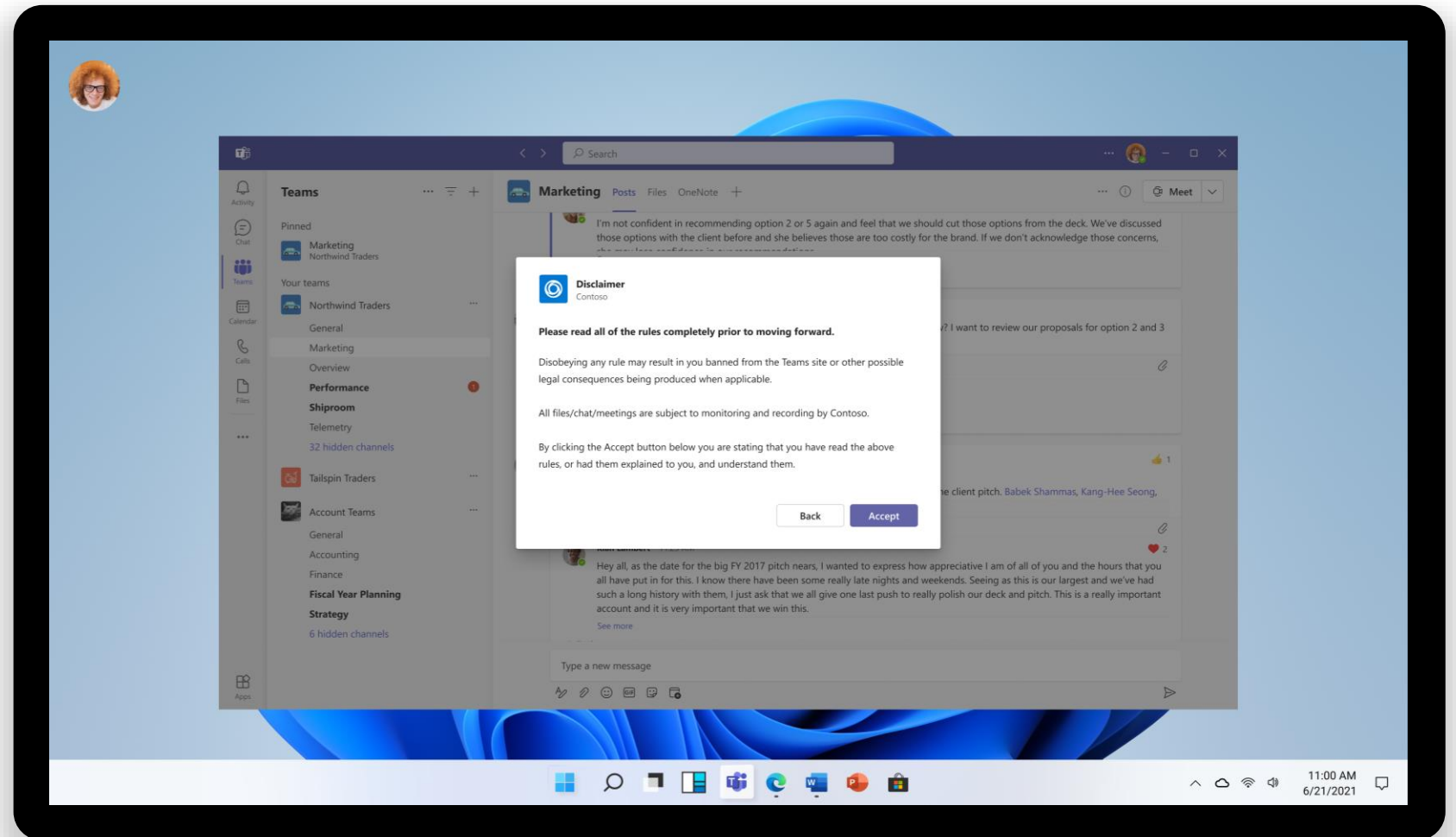
Government/SLG teamwork solutions

Empower the individual to participate

Government – Onboarding an Individual

Provide individuals an automated disclaimer to establish Teams use and onboarding best practices.
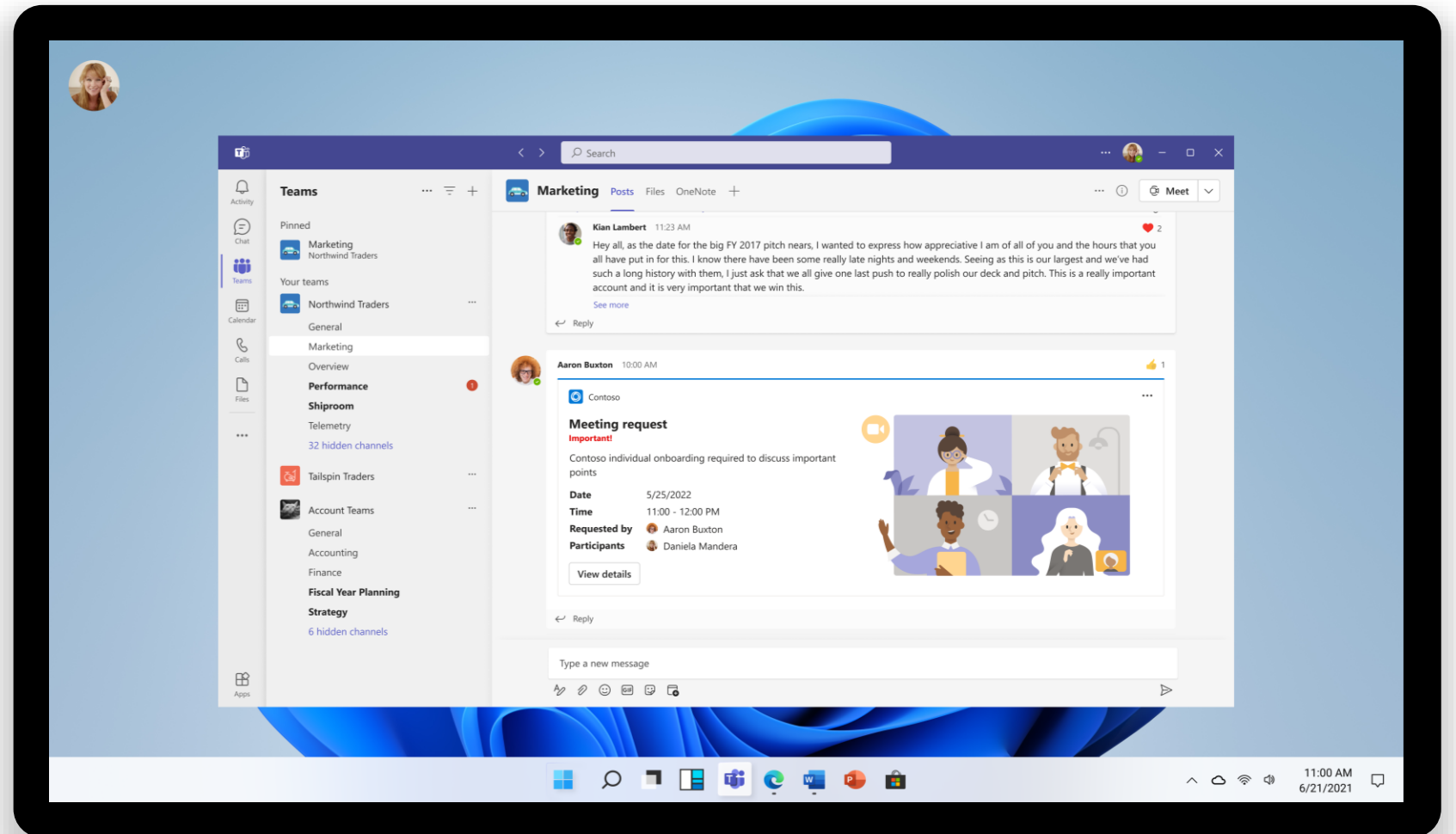
Government – Onboarding an Individual

Enable individuals to connect with anyone on their support team right from the dashboard

- Start a chat, audio, or video call
- Review or join a meeting
- Request a meeting
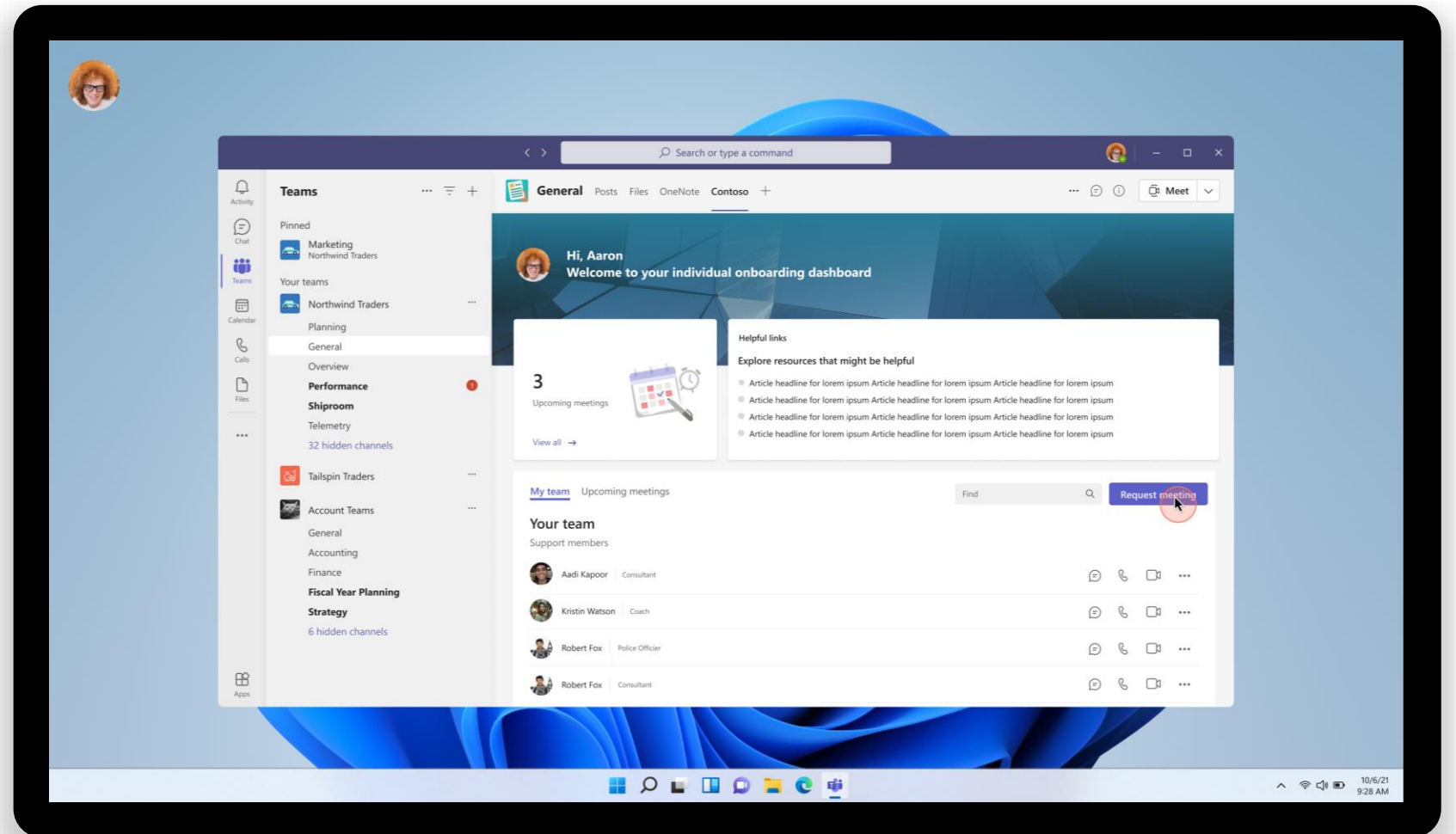
Government – Onboarding an Individual

Increase transparency between the individual and team members with channel posts

Solution highlights – best practices

Key solution design considerations

Platform extension points

- **Personal scoped app** operates via personal scoped tab and a channel scope bot.
  - **Personal tab** is the preferred way to handle most requests. Coordinators onboard users, schedule meetings, view dashboards, etc.
  - **Channel scope** provides a channel tab in the Team, accesses the dashboard, and views, checks, and requests meetings.
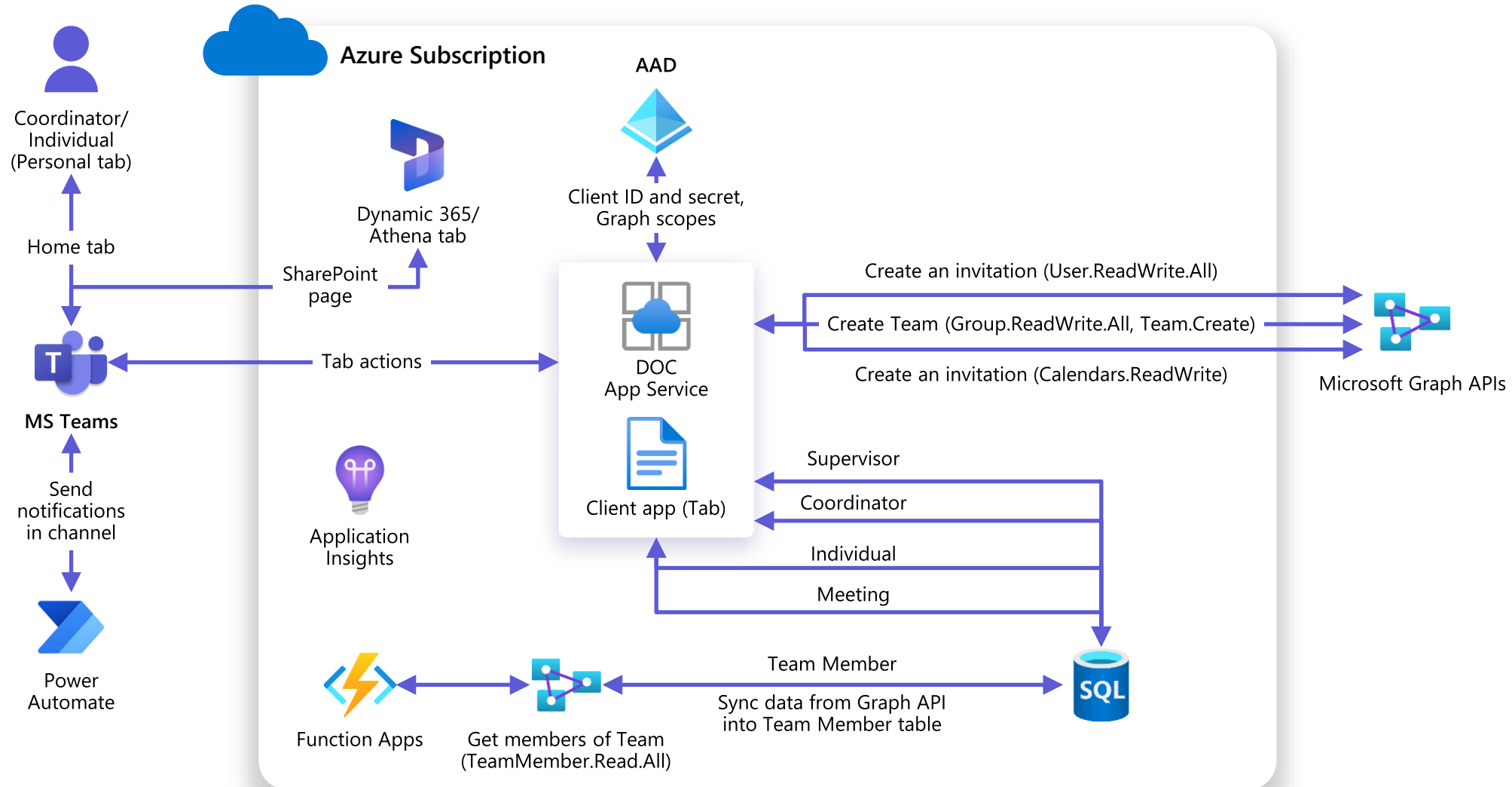- **Task module** are used extensively to onboard new individuals.

User experience

- The app uses tabs and task modules to visually present information, and provides a dashboard view users check to look for individual Teams and upcoming appointments.
- Individuals can check their meetings, request meetings from the Teams tab application, and share images and documents.

Graph API

- The app leverages Microsoft Graph APIs to schedule meetings, get upcoming meetings, create user accounts, and add/remove members.

Solution architecture

Thank you