

**Microsoft 365**  
**provisioning**  
with ShareGate:

**A complete guide**



**ShareGate®**

We all know how important it is to have governance rules for safe, secure, and effective use of Microsoft 365 in your organization, right?

Whether you're a seasoned Microsoft pro or just starting out, there's a whole world of governance solutions for you to discover and use in Microsoft 365. But let's zero in on one that stands out: provisioning. It's a critical aspect of Microsoft 365 lifecycle management. And you simply can't ignore it if you want to manage templates and naming conventions in a smart way.

In this guide, we'll walk you through using ShareGate to build a future-ready Microsoft 365 provisioning solution. We'll start by helping you set up your templates and then dive into all the cool features and implementation tips. Consider this guide your go-to resource for building a provisioning solution that turns Microsoft 365 into the collaborative and secure tool it should be.

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# What is Microsoft 365 provisioning?

In IT, provisioning means setting up and deploying a system.

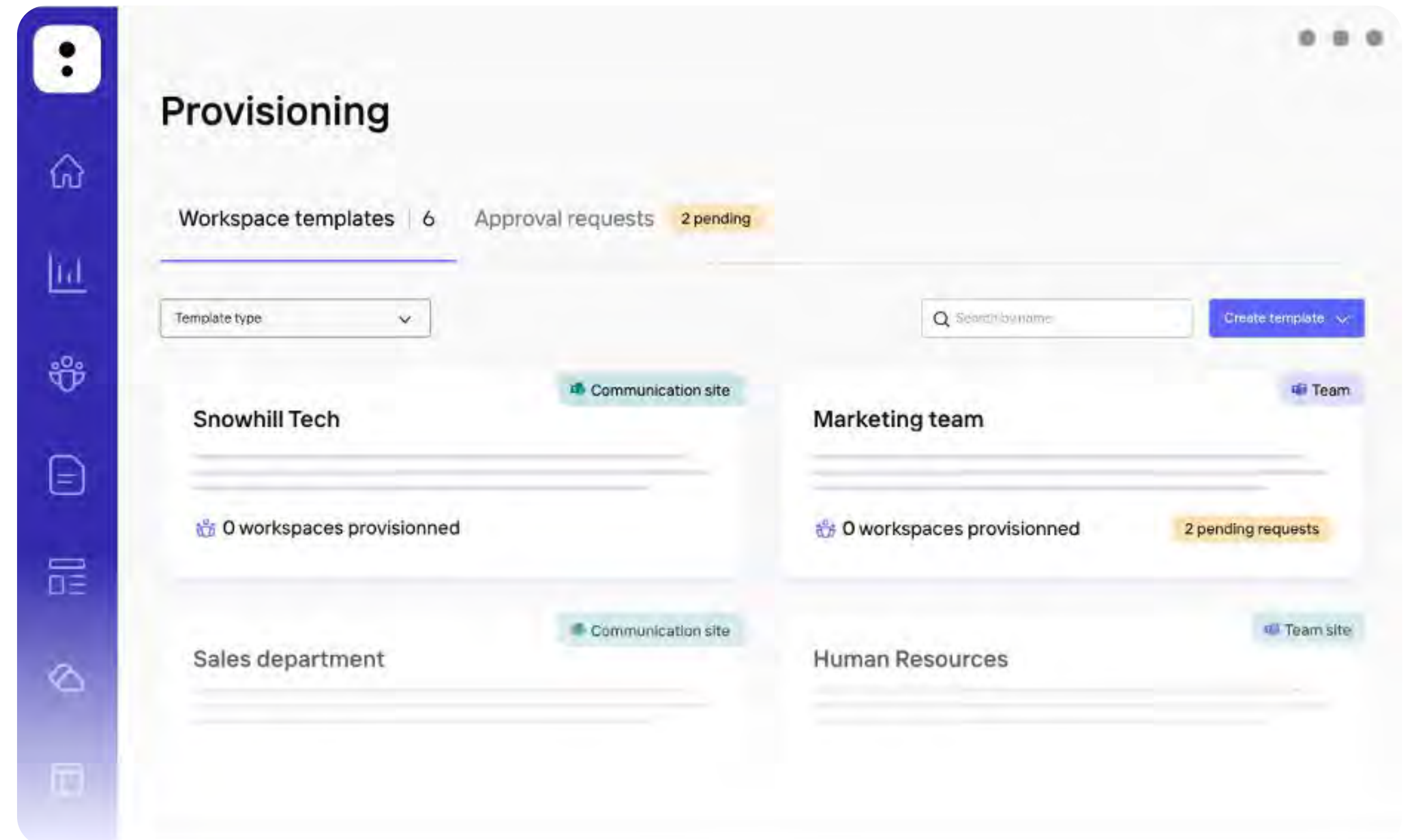
When you create an IT infrastructure for your organization, manage secure access to resources, and define user settings for the cloud, that's provisioning.

With ShareGate, you can create easy-to-use provisioning templates that guide your co-workers in creating workspaces in your Microsoft 365 environment by following the governance policies you've set for them in those templates.

Microsoft 365 provisioning enables people in your organization to create their own workspaces, like teams in Microsoft Teams, Microsoft 365 groups, SharePoint sites, etc., – without IT's help. Everyone gets the freedom to set up the workspaces they need, with IT's guardrails in place. Win-win!

## TIP

A provisioning strategy is crucial for keeping your environment organized and secure.



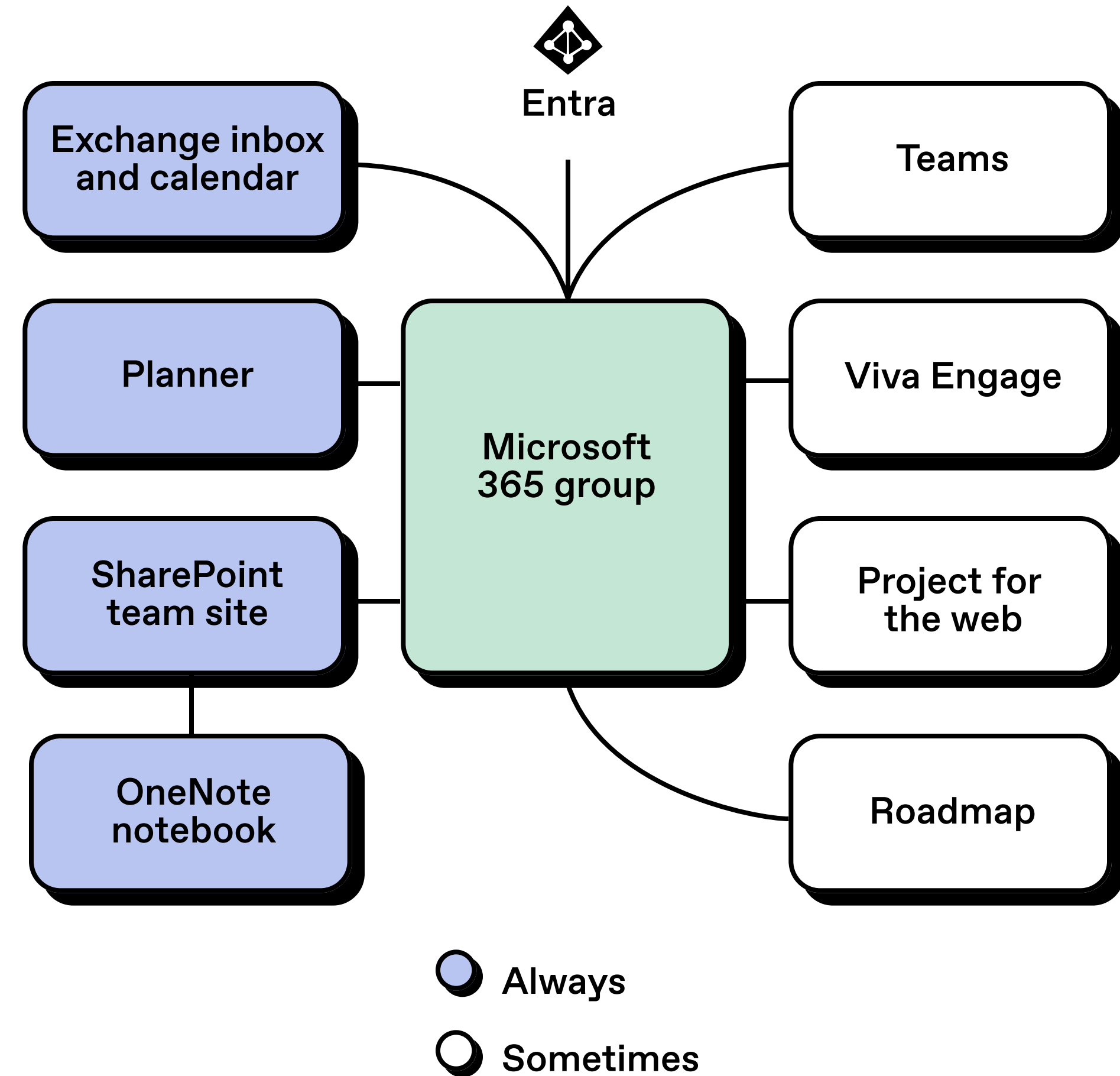
# Growing pains gains

In today's modern workplace, organizations deal with a growing volume, speed, and variety of content in their Microsoft 365 environment. The growth can go beyond sites and teams; it can happen across all Microsoft 365-related services.

Without a provisioning strategy in place for Microsoft 365, you might find yourself dealing with issues that can drain your resources, such as:

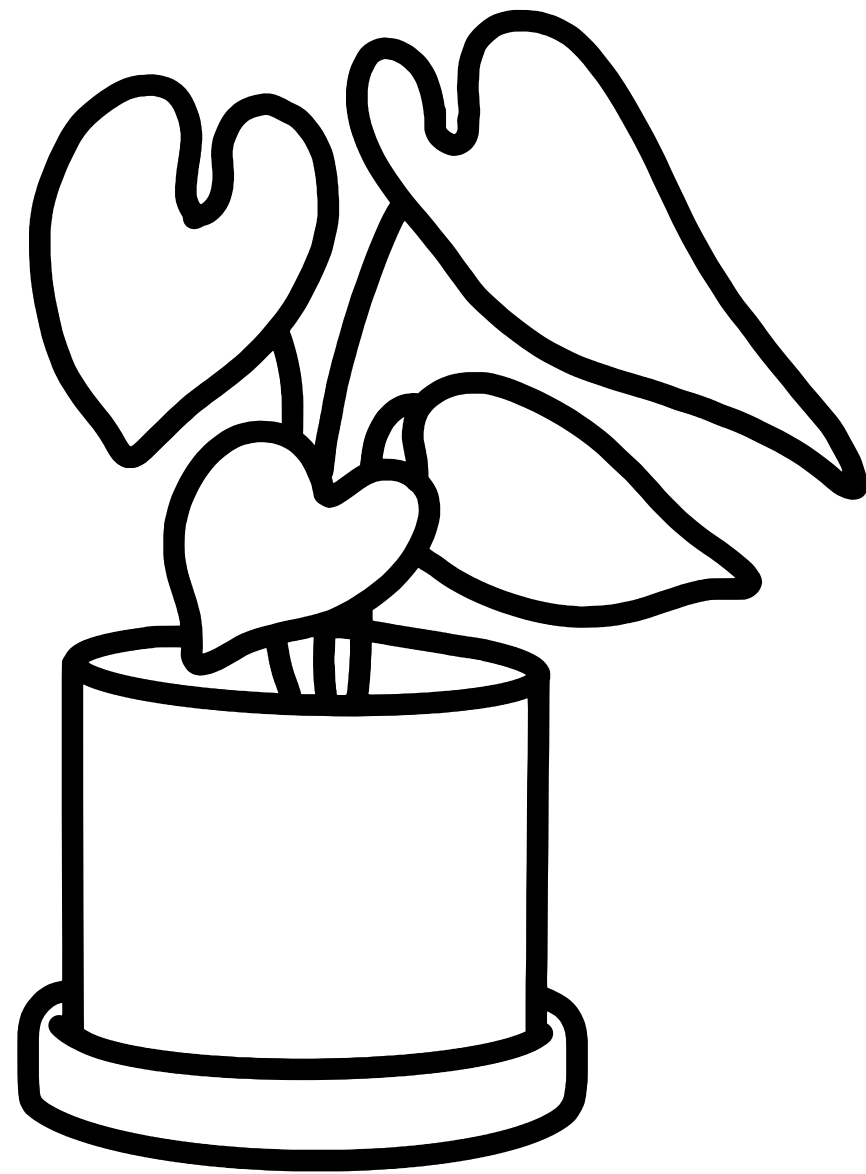
- Ineffective naming
- Owners missing
- Redundant team sites
- Data loss risks
- Loss of control
- Slower team/site start
- Inefficient navigation
- Training and adoption challenges

## Microsoft 365 Groups and related services



A Microsoft 365 provisioning strategy has advantages for your IT team and organization:

- **Boosts productivity:** Users can create and manage their own workspaces, leading to higher adoption and better teamwork.
- **Saves IT time:** IT can focus on important tasks instead of dealing with routine provisioning requests or manual, repetitive tasks.
- **Improves security:** IT sets guardrails and policies to ensure safe provisioning, reducing the risk of shadow IT and sprawl while maintaining control over what's being created.



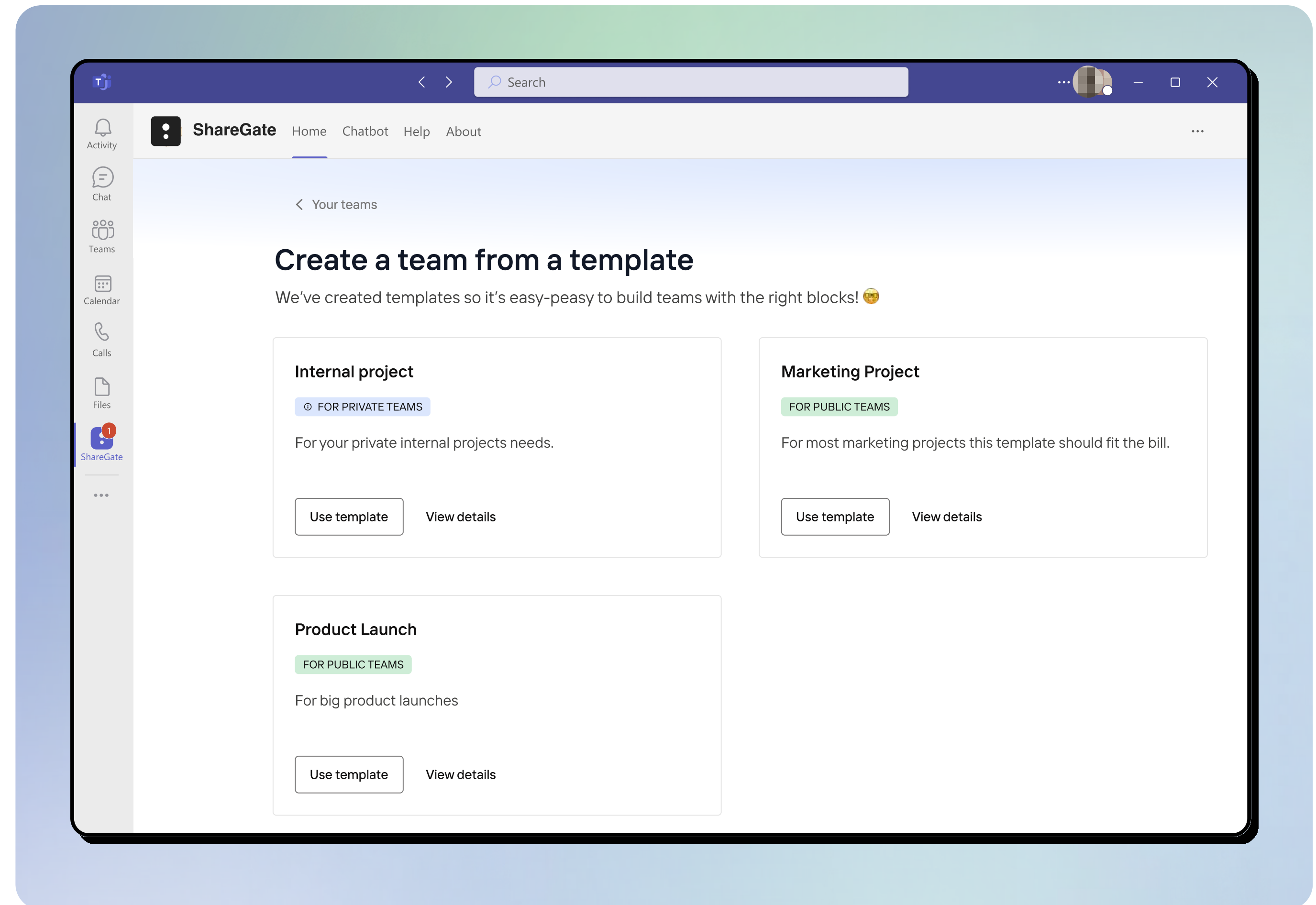
# How it works

Microsoft's out-of-the-box provisioning solution includes high-level configurations available in different admin portals. But suppose you want to customize and adapt the provisioning process to your IT team's and end users' needs. In that case, you can use PowerShell, Power Automate, or an out-of-the-box management solution for Microsoft 365 like [ShareGate](#).



# How ShareGate can help

ShareGate provides a one-stop solution for Microsoft 365 provisioning, including **template creation**, **SharePoint blueprint sites**, and the **ShareGate end-user app** in Microsoft Teams.





ShareGate helps you guide end users in creating the teams and SharePoint sites they need the right way, from the get-go.

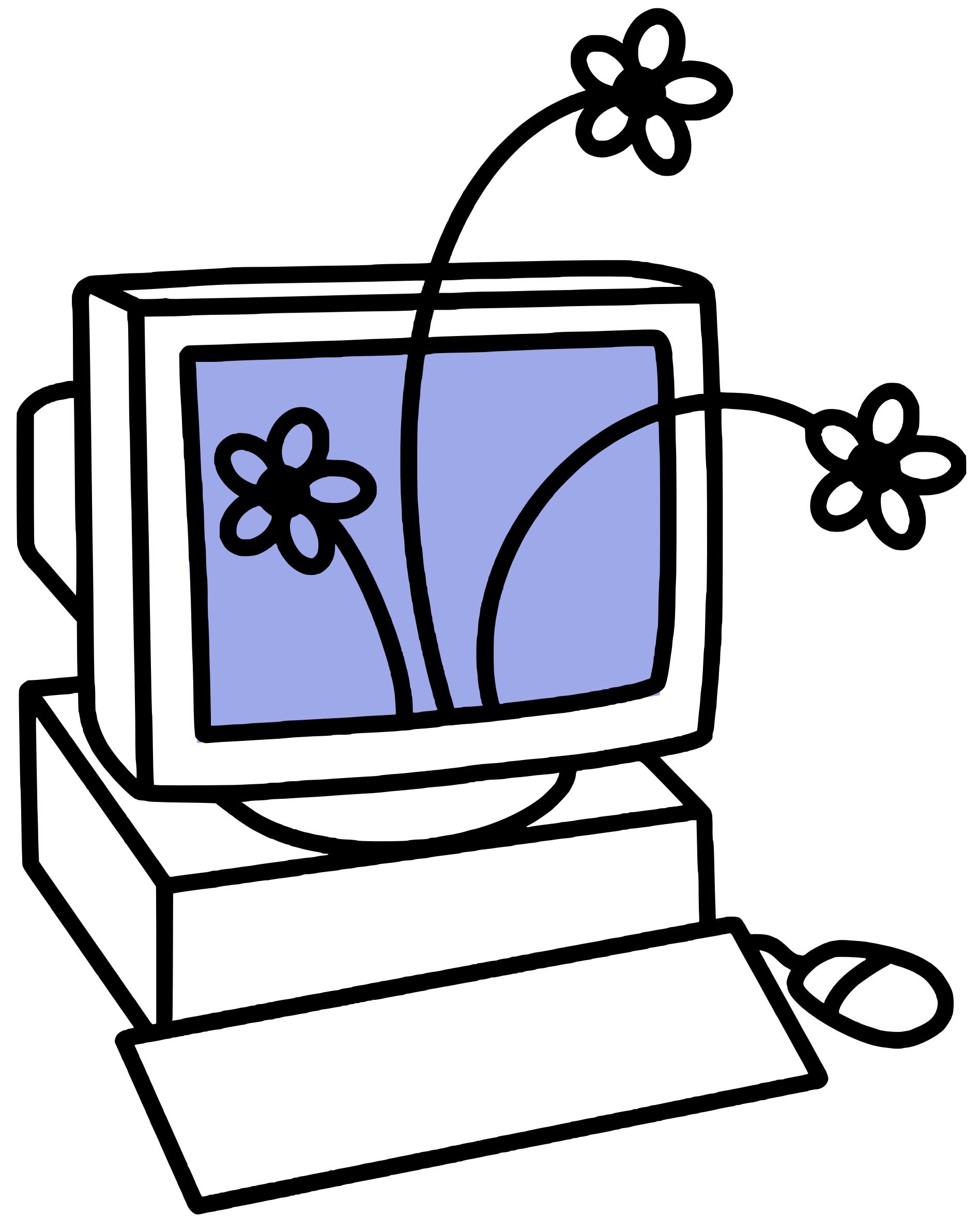
**Custom templates:** Create unlimited templates customized to the needs of your IT team and end users.

**ShareGate Blueprints:** Attach an existing SharePoint site to your provisioning templates so users get a purpose-fit site at the moment of creating their workspace.

**Dynamic templates:** SharePoint sites embedded in templates dynamically update as changes are made to the blueprint site.

**Approval workflows:** Include an approval workflow in your provisioning templates so admins maintain control of preventing duplicates and any unique compliance guidelines.

**ShareGate's end-user app:** End users create and manage their workspaces from start to finish without leaving Teams.



# Master Microsoft 365 provisioning with ShareGate, step by step

Creating an effective and efficient Microsoft 365 provisioning solution doesn't have to be complex. In fact, it can be simplified into a few straightforward steps. Here's how you can do it:

## 1 Get your templates ready

Name your template and add a description →

Add owners →

Add governance rules →

Apply governance policies →

Sync content and structure →

Set up channels →

Associate sites with a hub site →

## 2 Implement the solution

Start with a pilot group →

Get your users on board →

Group creation not allowed in your tenant?  
No problem →

# Let's get started!



# Get your templates ready



Check out our quick demo of [ShareGate provisioning in action](#). Then, keep reading to discover the steps on how to set up and implement a Microsoft 365 provisioning solution with ShareGate.

## Let's get to work.

Before creating templates, choose between a Teams or a SharePoint site template. Understand what already exists in your environment and identify any gaps that need to be filled.

- How is the workspace currently being used? Are there content types with the names "Departments", "Function", "Projects", or "Customers"? The names themselves can give you a sense of their purposes or categories.

- Identify the most common requests that your internal IT help desk receives for IT support. These requests should be prioritized when creating your templates. For example, things like "My site doesn't look right" or "I need to share a document with a guest" are common ones to address.

### TIPS

Once you have a clear idea of the template you need, start preparing **three or four templates**. And as a general rule, try to **keep the number of items in a list to seven or fewer**, since people tend to have trouble remembering more than that.

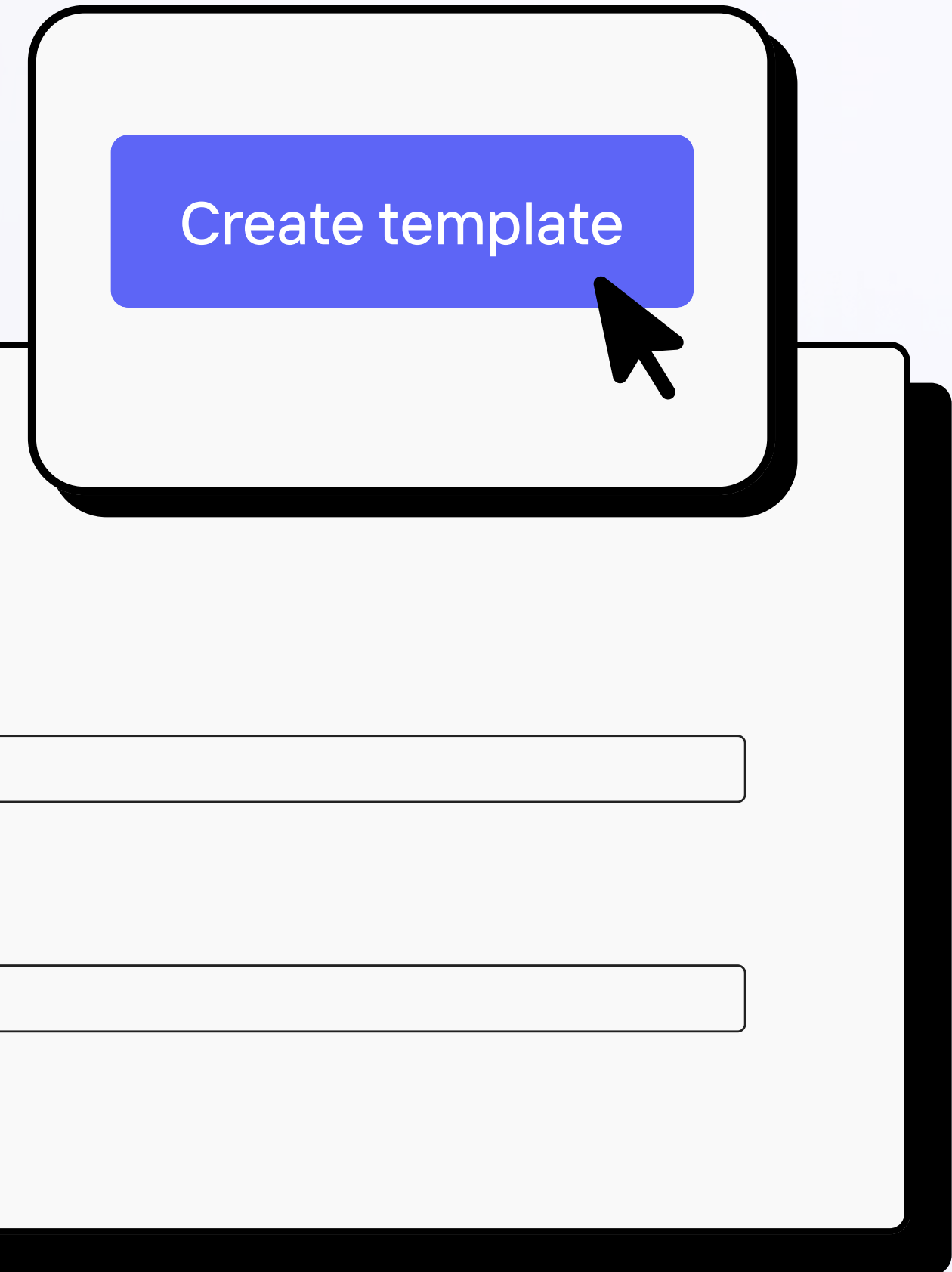
# Name your template and add a description

A well-defined template title and description will help your users understand what the template is for and how to use it. Is the template intended for event planning or product testing purposes? If so, add that info to your template!

The template description is crucial for adoption. Take the time to write the descriptions in a way that helps users choose the right template for their needs. The descriptions will also help you better understand and report on the workspaces created in your tenant.

## Things to keep in mind when writing a template description:

- Choose a clear and catchy name
- Briefly explain what the workspace's purpose or function is within the organization
- Summarize the main goals the team is working towards
- Let users know about the workspace's privacy and sharing settings, including guest or external access



# Add owners

Once you've come up with a clear title and description, think about how many owners that template should have.

Owners handle membership, guests, and settings for teams and SharePoint sites.

## TIP

It's good to assign at least two owners to share the management of each team and site. This way, if one owner leaves, there's still someone else accountable. By default, ShareGate's provisioning templates recommend having two owners.

Although you can set a minimum of two owners, users can add more than that during creation. For example, someone creating a team or site for a cross-departmental project might want to assign an owner from each department.

**84% of templates created in ShareGate have two owners.**


## How many **team owners** are required?

Team owners manage membership, guests, and settings for teams.

<input type="radio"/> 1	<input checked="" type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
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**Recommended**

## What **privacy** level do these teams need?

<input type="radio"/>  Private	<input type="radio"/>  Public
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# Add governance rules

So, you named your template, added a description, and determined the minimum number of owners. The next step is ensuring users follow business standards when creating their teams.

- Strike the right balance by implementing governance rules that are necessary, but at the same time, keep the process user-friendly and simple for everyone. The goal of these templates is to give users guidelines to follow while still providing flexibility.
- Enforce a naming convention in addition to the minimum owners requirement. Naming conventions can help you make sense of your teams and sites and avoid having multiple components with the same name.
- Depending on your needs, consider implementing an approval process. It adds an extra step to make sure teams and sites are created according to your requirements. You can even set up an approval process for workspaces created using specific templates. This helps admins maintain control of any unique compliance guidelines and prevents duplicates.

**Let's take a closer look at these governance rules** →



## Naming convention

Using a naming convention helps you maintain order and consistency. It also helps people search and discover teams.

But, implementing a naming convention can come with challenges, including:

- Getting everyone on the same page and reaching an agreement among stakeholders
- Keeping it simple and flexible
- Updating it to adapt to evolving organizational needs

One way to address this is by adding a prefix or a suffix. With ShareGate, you can add either one or both!

77% of templates created using ShareGate have an active naming convention.

### Prefix

#### Visibility

- It can make the team's and site's purpose more prominent and immediately recognizable.
- It can help distinguish teams or sites from one another, especially when viewing long lists of workspaces.

Be mindful of the Teams view inside the Teams app; the longer the prefix, the less visible the name.

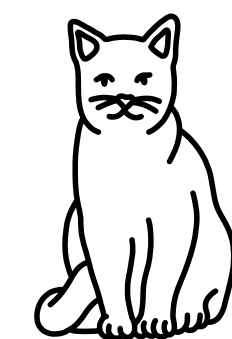
**Example:** Using PRO as a prefix for a Project template.

### Suffix

#### Readability

- Using a suffix at the end of the name can help preserve the readability of the base name by keeping it at the beginning.
- Useful when the base name is the most important part of the team's or site's identity.

**Example:** Using Project as a suffix for a Project template.



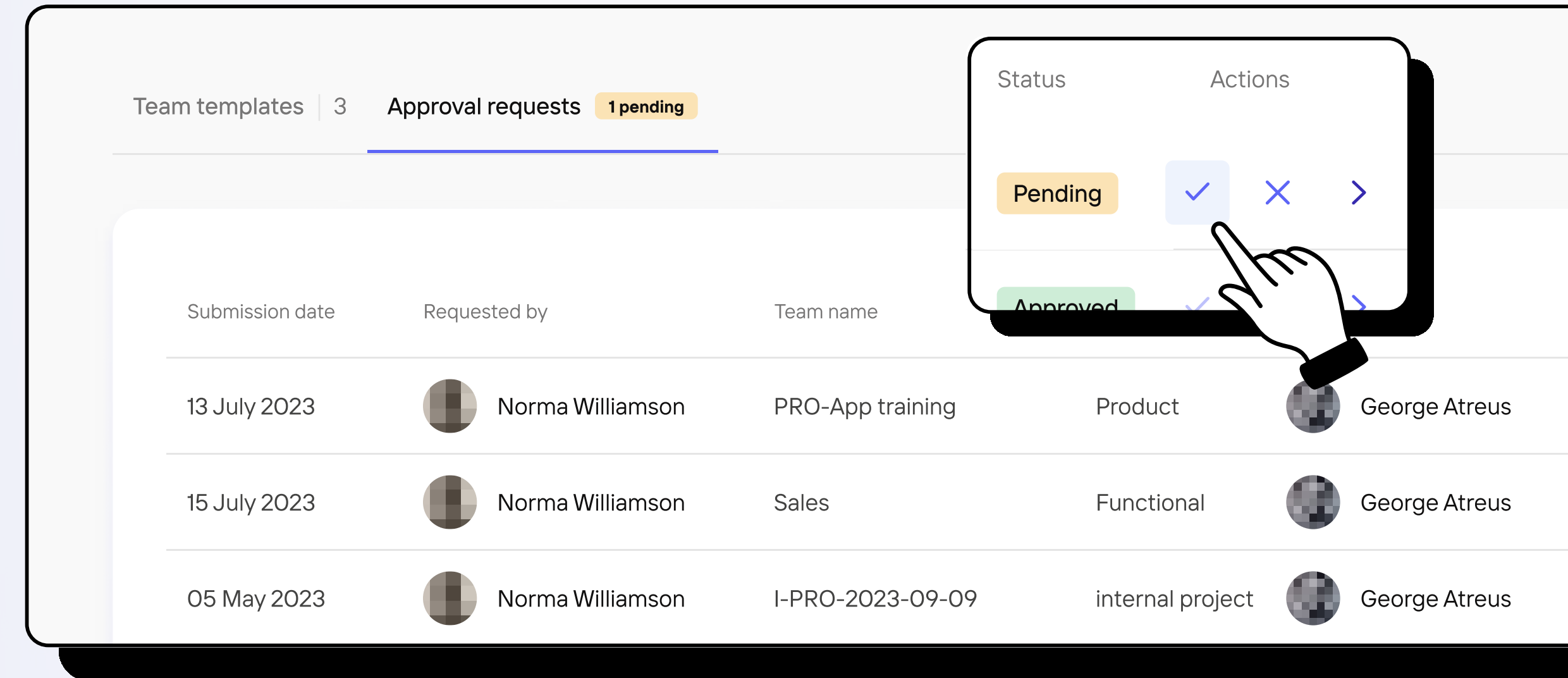


## Approval process

To create a new team or site, your users need a thumbs-up from an admin. You want to ensure no duplicates, the workspace's name is appropriate, the right owners are assigned, and security settings are in place.

Most companies aim for self-service, but it's difficult to achieve using Microsoft's out-of-the-box tools. This often leads to unorganized, duplicated, and unused sites.

With ShareGate's Approval workflows, either the admin or the end user designated by your IT team can approve a new workspace provisioned by a user.



As an admin, you have the power to approve or reject workspaces created from specific templates. This helps you monitor workspaces created with stricter security templates, ensuring their safety.

Approval requests can be located within the **Approval Request** tab.

### Do these teams require approval?

As the approver, you control which teams get created from this template. [Learn more](#)

 George Atreus (you)

# Apply governance policies

With your rules enforced within your template, you've set the guardrails for users to follow when creating workspaces. But wouldn't it also be great if your users applied the right security settings to the workspaces they create?

Governance policies are rules that keep Microsoft 365 and Teams in check. They cover workspace creation, content management, security, access control, and compliance.

Implementing governance policies from the start helps you:

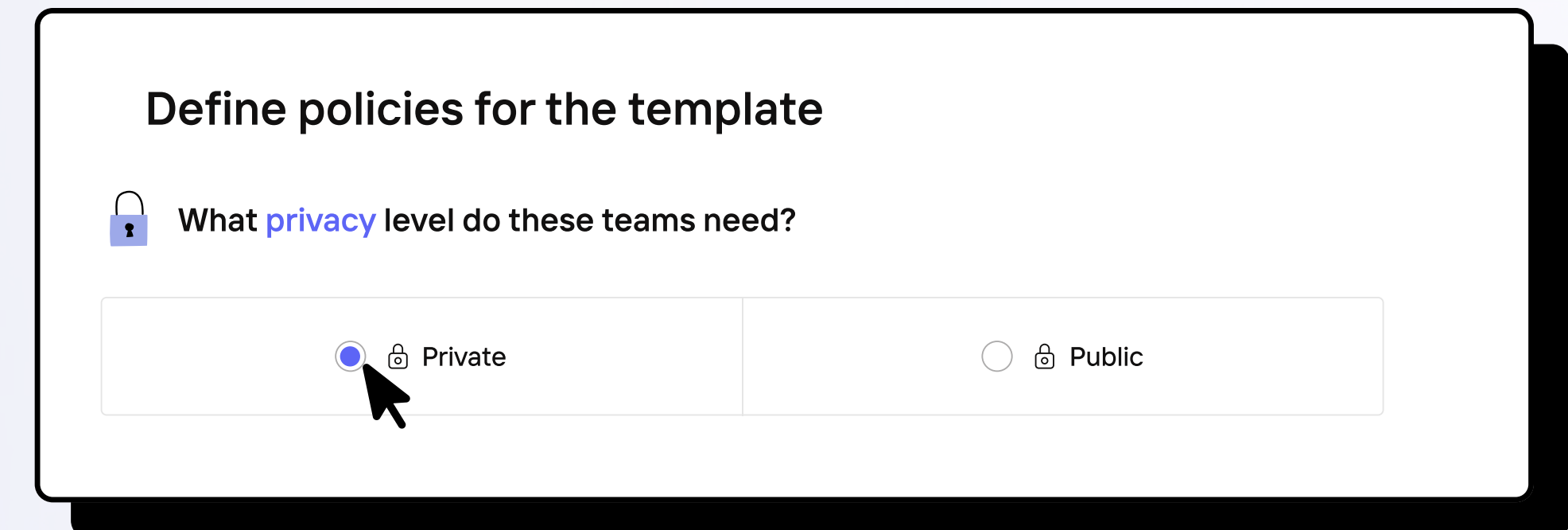
- Avoid stale content when a team becomes inactive
- Apply the right security settings
- Stay secure with automated external sharing and guest reviews

Let's explore a few policies you can define within a template that help you maintain a secure and productive environment:

## Public vs. private

What kind of team do you want it to be: a **private** or **public** team? In Microsoft

Teams, a **private** team is limited to a specific set of people. A **public** team is open to anyone in the organization to join.



For example, if you're working on a sensitive project with confidential information, you'd choose a private team. This limits access to a specific group of people involved, ensuring confidentiality. Alternatively, a public team would be more suitable if you're working on a collaborative initiative or company-wide announcement. It allows anyone in the organization to join and start a conversation.

## External sharing and guests

External sharing is about making content accessible to people outside your organization who don't have a Microsoft 365 account.

When creating a team using ShareGate, you can easily control external sharing settings using these sensitivity tags:

- Only people in your organization
- With existing guests
- With new and existing guests
- With anyone

Guests are individuals without a license from your Microsoft 365 tenant. They typically come from outside your organization, like partners, vendors, or clients. Benefits of collaborating with guests in Microsoft 365 include:

When creating a team, you can directly specify the Guest Access setting with ShareGate's sensitivity tags:

- Guest allowed
- Guest not allowed



### TIP

ShareGate's sensitivity tags have your back when it comes to assigning the best security settings for **privacy, guest access, and external sharing**. You can assign a combination of security settings—for example, you can create a *Highly Confidential* tag with the security settings *Private, Only with people in your organization, and Guests not allowed*.

## Purpose and sensitivity tags

Our user data shows that 82% of templates created using ShareGate have **purpose tags**, and 65% has **sensitivity tags**.

- **Purpose tags** help you understand why users create teams and better organize them by business purpose.
- **Sensitivity tags** help you assess how much of a security risk a team poses to your business. That way, you can apply the right security settings to each team from the get-go!

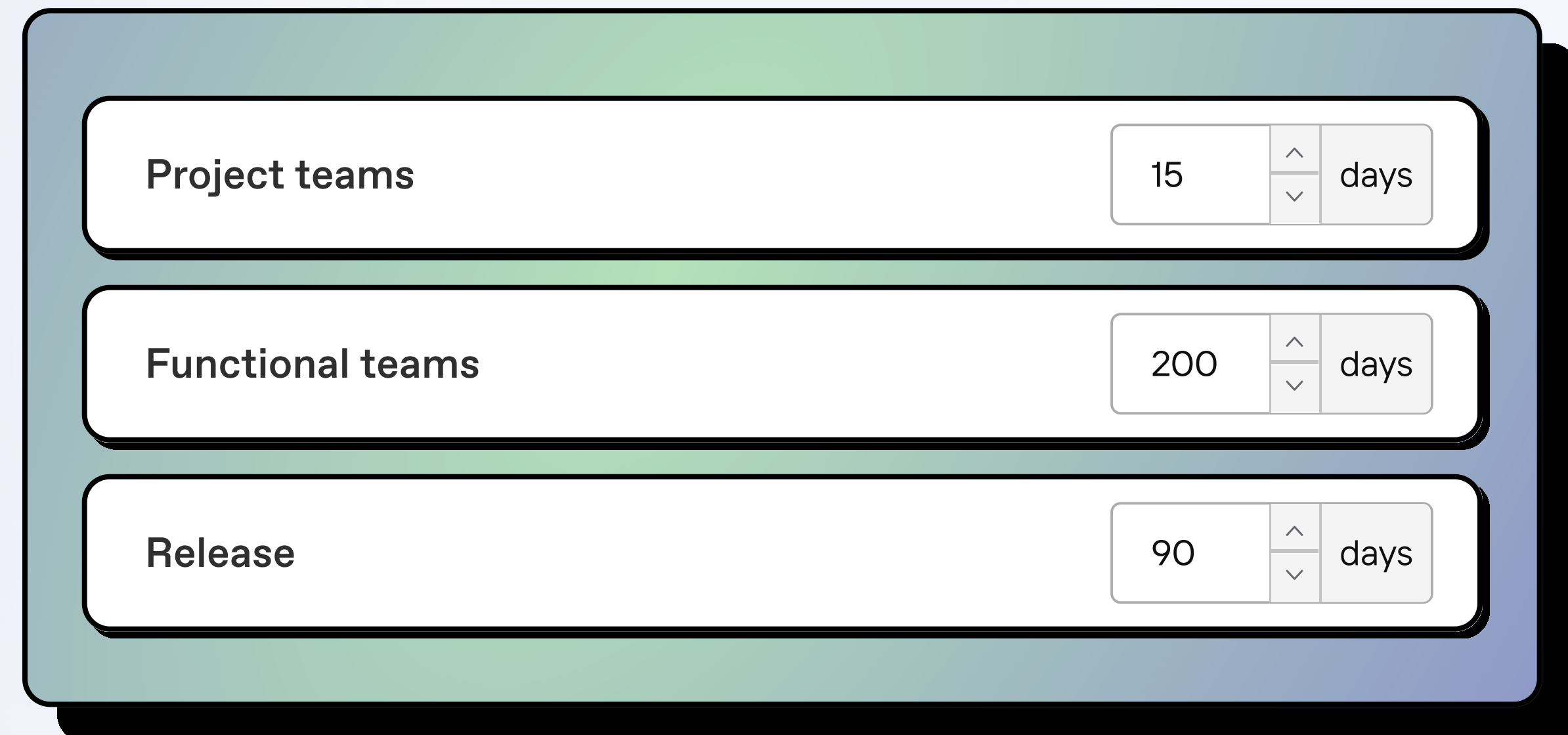
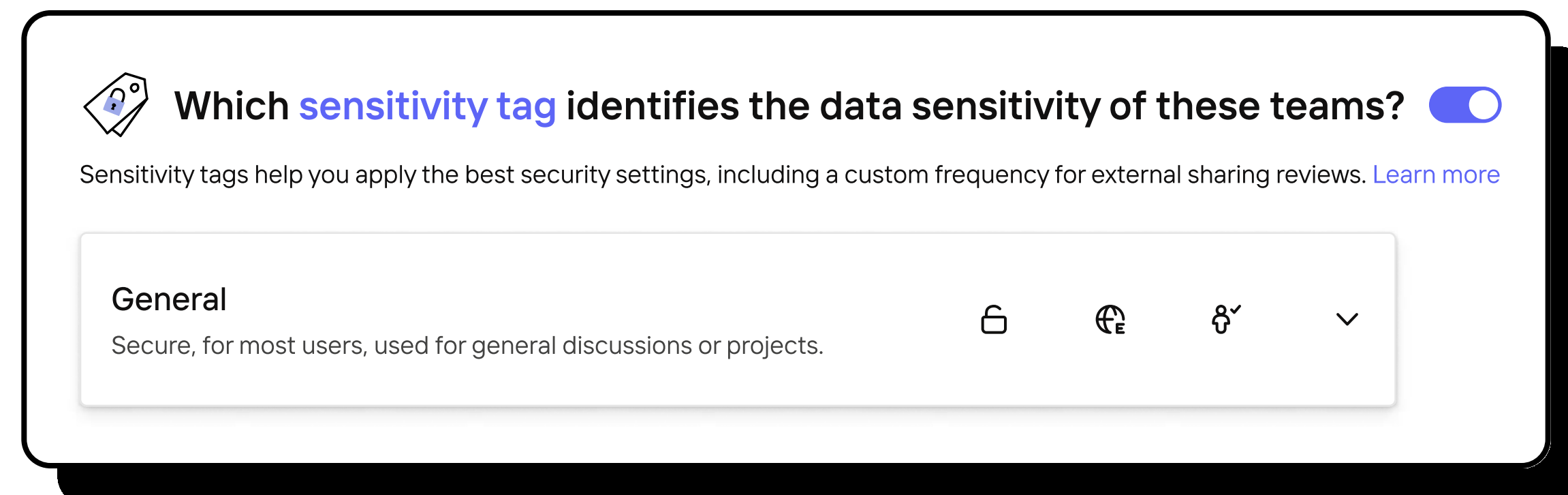
ShareGate provisioning is fully integrated with purpose and sensitivity tags you can manage from the **Policies** menu.

You can categorize teams by their level of sensitivity. By implementing **sensitivity tags** at the template level, you ensure proper review

of guest and external sharing. This guarantees that external users and guests have access only to relevant content in Teams.

When assigning **purpose tags** to a team, our goal is not to classify the content, but to allow you to determine the threshold for inactive teams. Setting a longer or shorter threshold for inactive teams helps optimize resources, keep the workspace organized, and tidy up teams based on their relevance and project status.

Here's an example of how to set up thresholds:



## More governance tools

Add and automate an inactivity policy to effectively manage the entire lifecycle of the workspace, from creation to archiving or deletion.

ShareGate's [Inactivity detection policy](#) automatically finds inactive teams and sites in your tenant, so you don't have to. And it asks the right people to take action on them, by email or via our chatbot. Which is why it's important to add at least two owners to share the management of each workspace.

The screenshot shows the 'Policies' page in the Microsoft 365 Admin Center. The page title is 'Policies' and it includes navigation links for 'Activity', settings, notifications, help, and a user profile. The main section is titled 'Inactivity detection' and includes a description: 'Teams and groups are considered inactive if no activity is detected across Sites and Teams in the time period defined.' A toggle switch for 'Automatically ask owners for the inactive policy' is turned on. Below this, there is a text box explaining that owners will be asked to keep, archive, or delete inactive teams and groups, with a 'Learn more' link. A configuration field shows 'Consider anything inactive after 90 days'. The 'Method of communication' section asks 'How would you like to contact owners for this policy?' and offers two options: 'Microsoft Teams chatbot' (with a 'GREATER RESPONSE RATE!' badge) and 'Email' (which is selected). The 'Email' option description states that ShareGate will contact team and group owners by email and provides a 'Change the email sender' link. At the bottom, there is a button labeled 'Customize email sent to owners' with an external link icon.

# Sync content and structure

With Microsoft giving more power to end users by making it easier to discover SharePoint sites associated with teams, and creating new sites thanks to Copilot, it's crucial to have a good governance plan in place. That way, you can manage the number of sites, teams, and content in your tenant.

Stay organized with **ShareGate Blueprints**! This feature lets you use an active SharePoint site as a blueprint to enable the creation of perfectly purpose-fit sites associated to your teams.

## How it works

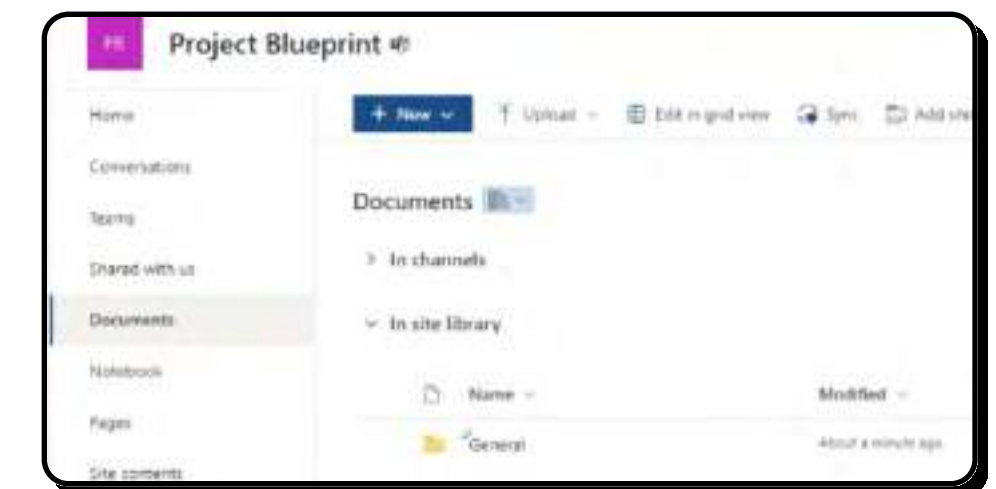
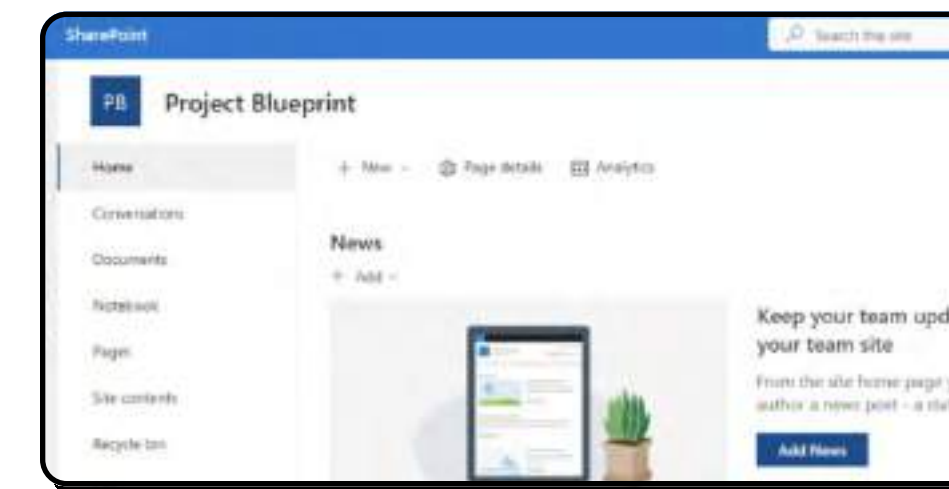
With ShareGate Blueprints, you identify an existing SharePoint site with all its web parts, components, structure, and content to embed it in your provisioning template. When a user creates a team using that template, ShareGate quickly copies the blueprint site, including all its features, within minutes of the workspace's creation.

Even better, any changes you make to the blueprint site will automatically update the provisioning template.

### TIP

Set default folder structure and documents. ShareGate Blueprints enables you to establish a folder structure and document within the general channel.

- 1 Make sure there's a teams attached to your SharePoint blueprint site.
- 2 Under the Documents library, select the General folder.



- 3 Create your own folder structure.
- 4 Customize the document library with documents, document templates or metadata.

# Set up channels

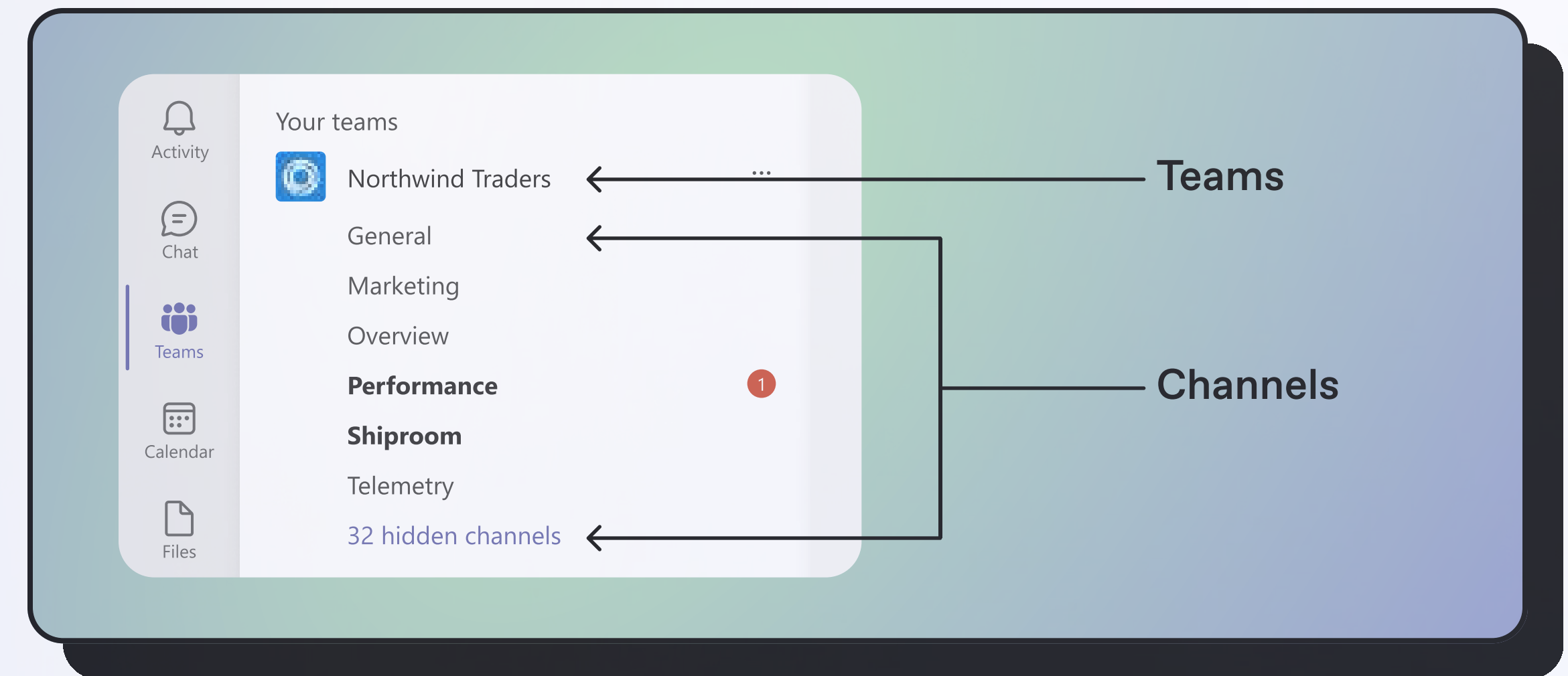
You're almost all set in getting your templates set up! Next, set up the channel structure for your teams ahead of time.

Channels are the conversations that happen within Microsoft Teams. Each can be dedicated to a specific topic, project, or department.

According to Microsoft MVP Jasper Oosterveld, it's ideal to let your end users decide the number of channels they create within their team. Alternatively, a good starting point is to have six channels, including the General channel, but users can choose any number of channels that suits their needs.

**64% of templates created using ShareGate don't have any extra channels besides the General channel.**

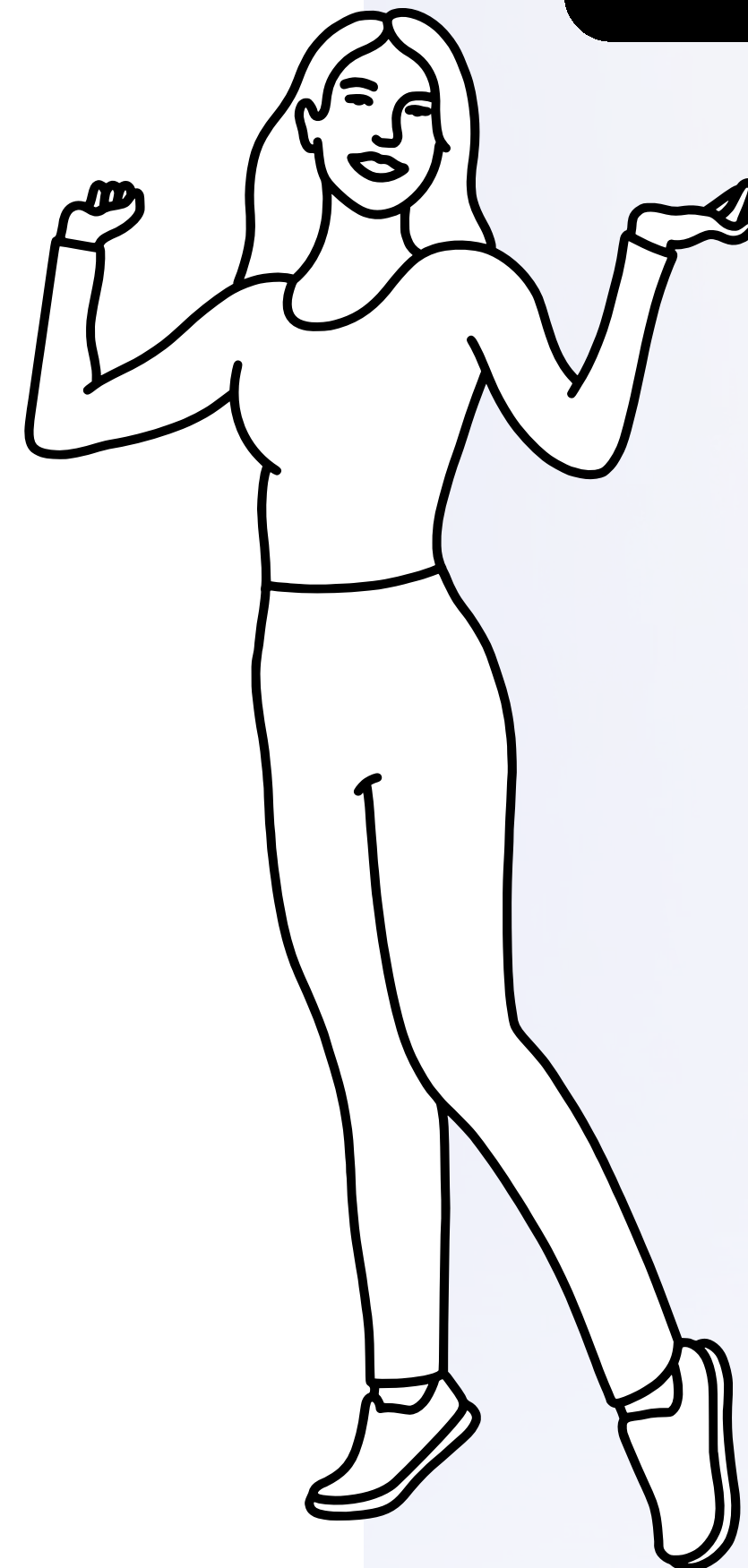
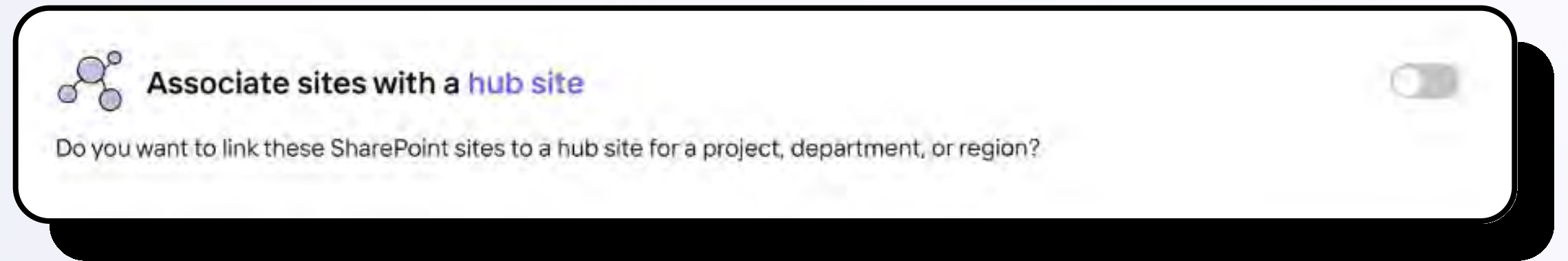
And there you have it—your templates are now ready!  
It's time to implement the provisioning solution.



# Associate sites with a hub sites

A hub site in SharePoint links together sites based on certain shared features. Associating sites with a hub site in your templates makes it easier for your users to find related content.

Click the toggle to associate provisioned sites with a hub site. If you enable a hub site, SharePoint sites created from your template will use the hub site's navigation structure and style settings.



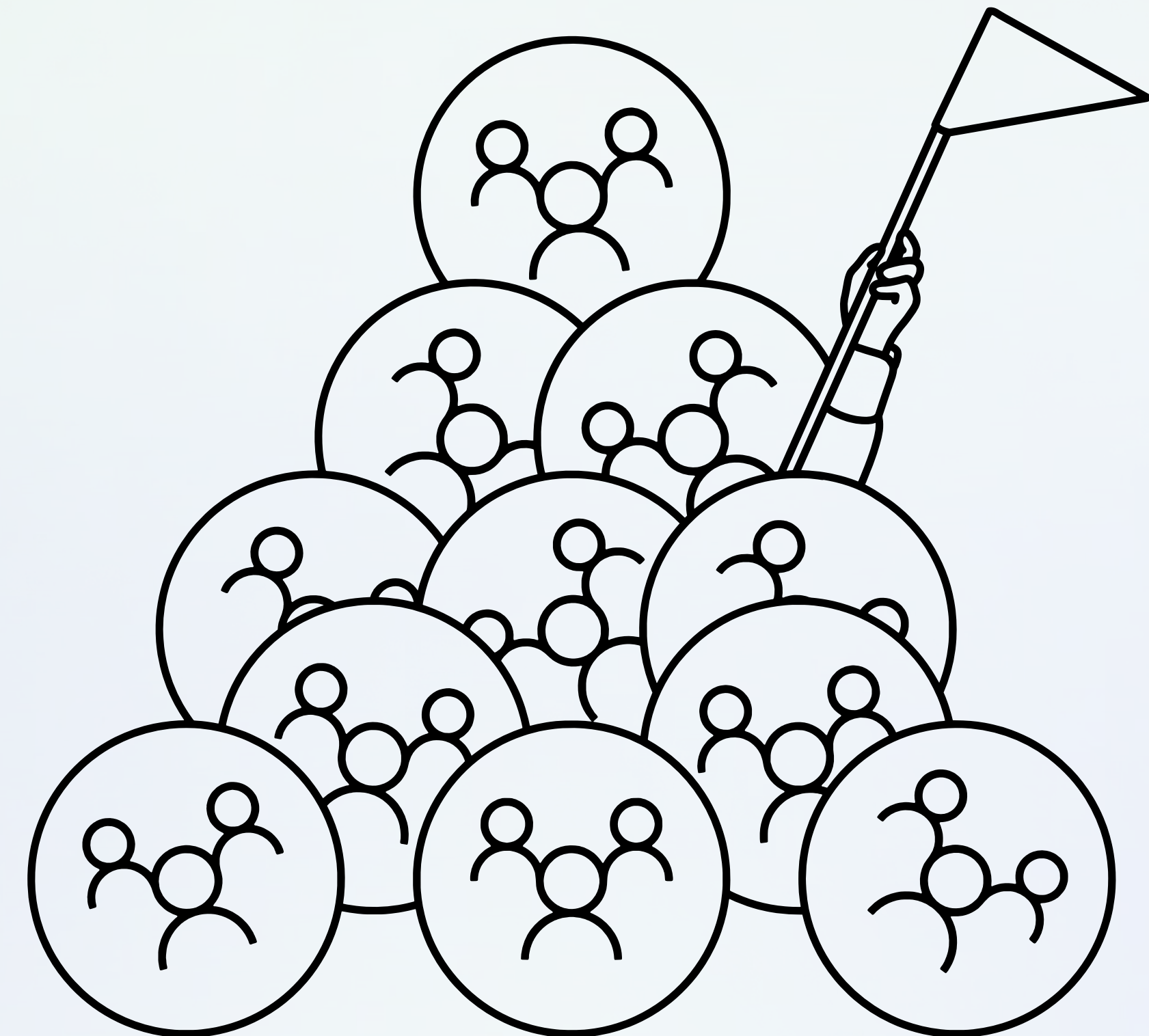


# Implement the solution

We spoke with ShareGate customers and IT admins and noticed a common trend in how companies implement workspaces in Microsoft 365.

When remote work became necessary due to the pandemic, quickly deploying tools like Teams caused issues like duplicate and inactive teams. People described it as chaotic and a nightmare. To solve this, many companies turned off self-service in Microsoft 365 and cleaned up unused teams. Now, organizations want a solution to effectively use Microsoft 365 while staying in control.

That's where ShareGate comes in!



# Start with a pilot group

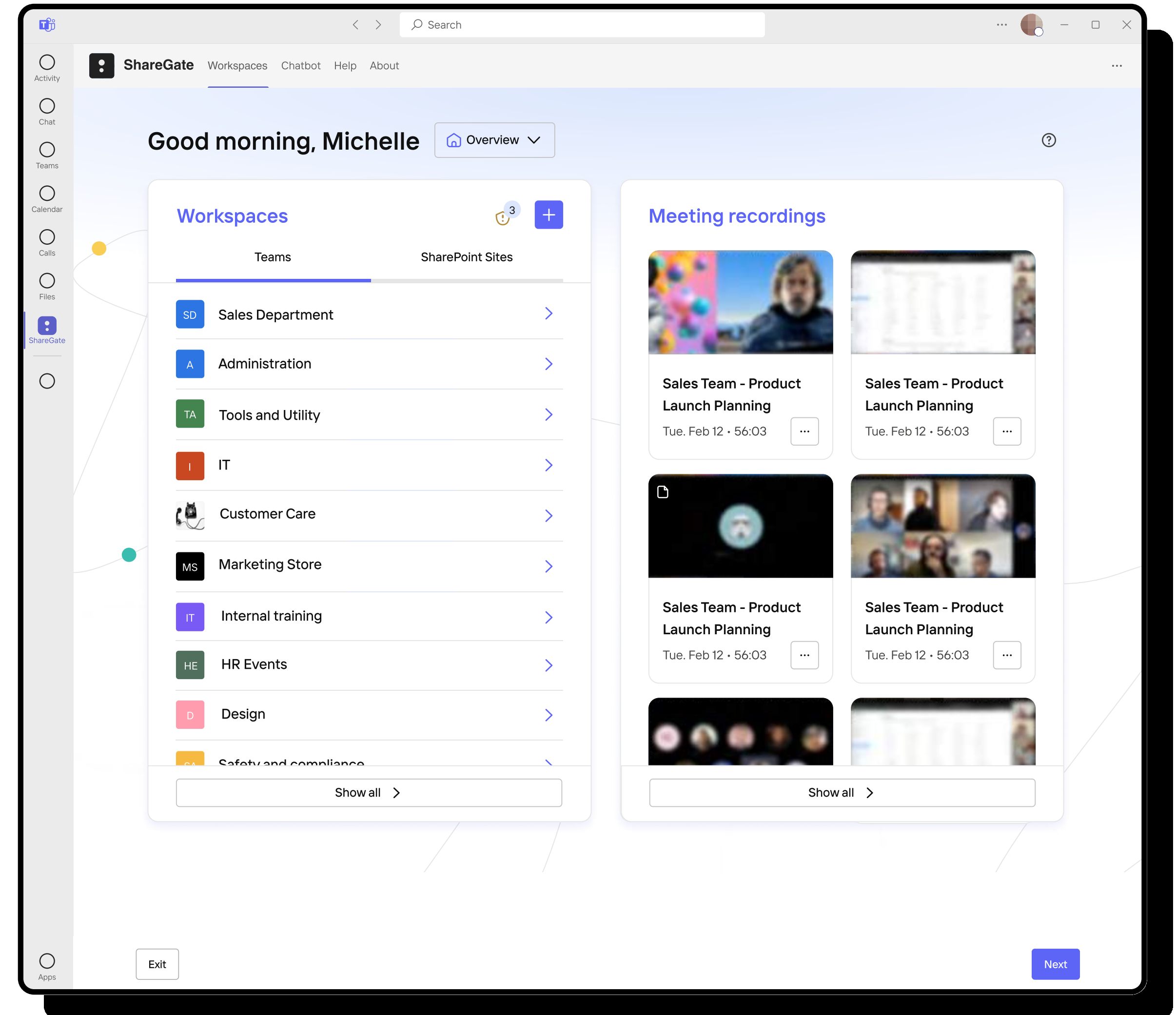
When implementing your Microsoft 365 provisioning solution with ShareGate, start small.

1. Test the process and template before introducing them company-wide. Add the necessary people to the Microsoft 365 group for testing.
2. Review feedback and make any changes before rolling out the solution to the whole company.
3. Don't forget to enable Microsoft 365 group creation for all users.

## TIP

To make your templates available to your end users, install the ShareGate end-user app in Teams and pin the app to the Teams sidebar menu for easy company-wide access.

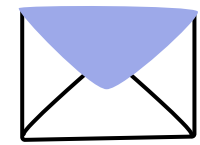
The ShareGate end-user app for Microsoft 365 provisioning is where your users can create and manage their workspaces, with your governance policies built right in-and without leaving Microsoft Teams!



# Get your users on board

How do you get your users to use new templates in Microsoft 365? How do you introduce this change within your organization? It all begins with a communication plan.

To help you tailor your communication strategy, we created a sample email that can help you start the conversation about implementing ShareGate's end-user Teams app for Microsoft 365 provisioning.



**Subject:** An easy way to create teams

Hi team,

We're excited to launch a new way to create collaborative teams in Microsoft Teams and SharePoint sites.

The new ShareGate Teams application will be available starting [date].

You'll notice the new application called ShareGate on Microsoft Teams when logging in after the above date.

## Why you should be using the ShareGate Teams App?

You know best about the security levels for your documents and teams, and who should have access.

With the ShareGate Teams app, you'll be able to:

- Create new teams and sites from IT-approved templates.
- See and manage all your teams and sites in a centralized place.
- Get notified once a team or site is no longer active to archive, keep or delete it.
- Regularly clean up externally shared links and guests.
- Classify teams by purpose and sensitivity.

## How it works

You can now create and manage your own workspaces with the ShareGate Teams app.

We have prepared some templates for you to use. If you don't see a template that fits your needs, let us know!

Please see the [step-by-step guide](#) on how to create a workspace using our organizational templates.

## Who do I contact if I need a new template?

For any questions, you can open a request with us at [IT desk contact info or process]. We hope this will make it easier for you to collaborate and keep track of your documents and conversations. Keeping our environment organized and secure is everyone's business!

IT team

# Group creation not allowed in your tenant? No problem

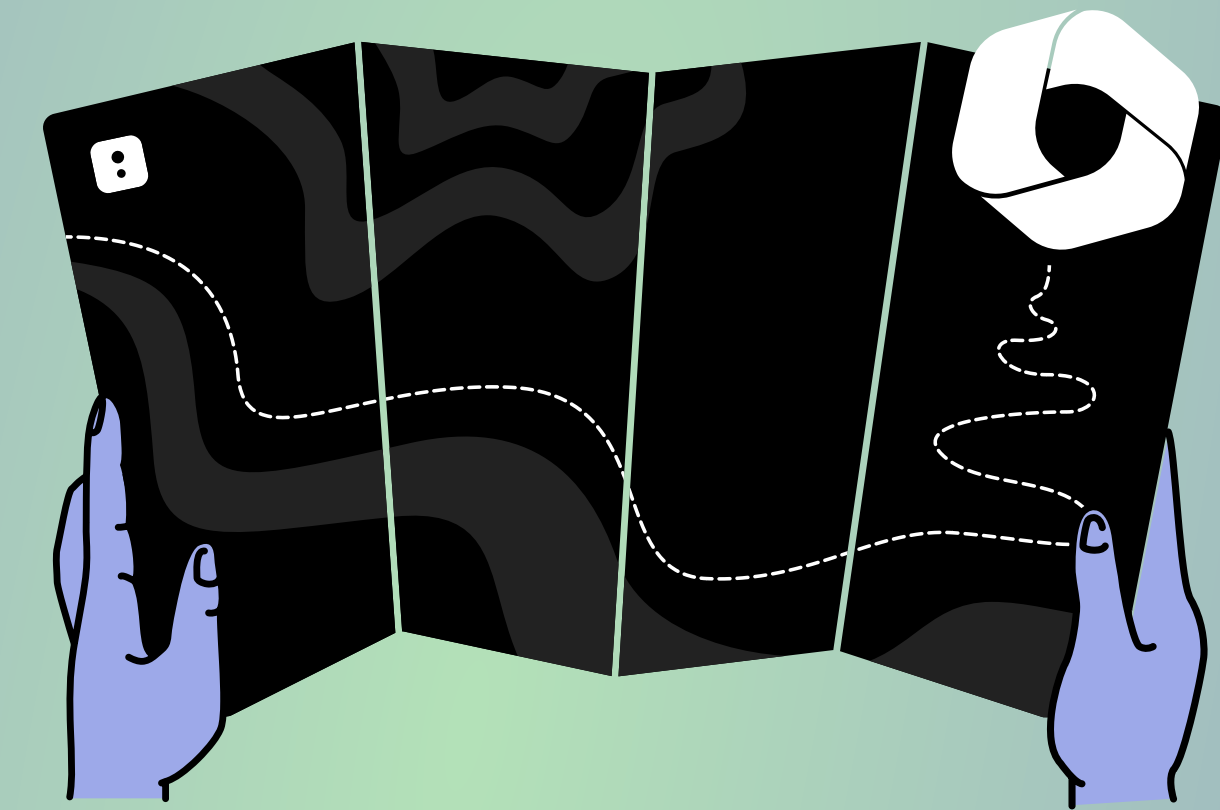
The ShareGate end-user app permissions align with your tenant's permission level. When creating teams and sites, we use the [Microsoft API with delegated permissions](#), avoiding any intrusive access that overrides tenant-level settings.

This means that ShareGate and Microsoft native solutions can work together seamlessly.

To enable ShareGate provisioning:

- Restrict the creation of Microsoft 365 groups to a select group of users. Follow the process in [Microsoft's official documentation to managing group creation](#).
- Hide the option for site creation in the SharePoint admin center.
- Enable the approval process for all ShareGate provisioning templates.

With the approval process, ShareGate can create workspaces and assign the appropriate owners afterward.



FREE MICROSOFT 365 ASSESSMENT

## Pinpoint your Microsoft 365 pain points

The first step in optimizing your Microsoft 365 environment has to be figuring out your current strengths and weaknesses. Use ShareGate's new Microsoft 365 maturity assessment tool to see where your tenant stands and get personalized advice on how to optimize it.

Assess your M365 maturity →