Microsoft Teams

Project Management Context

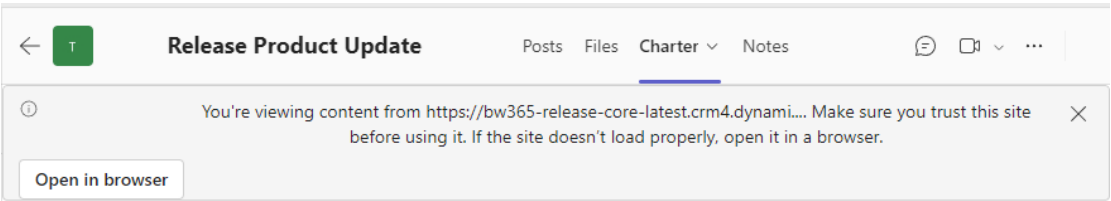
In this article we present options available for integrating your BrightWork 365 app with Microsoft Teams. With the integration of these two robust products, you'll have alternative methods for your team to stay connected, keep your projects organized, and for that all-important team collaboration. Providing various entry points for team members to work with the projects relevant to them will better ensure consistent and meaningful engagement throughout the execution of your projects.

Tip Your Customer Success Partner can help you decide and implement the option that makes the most sense for your organization's requirements and level of comfort with the technical configuration required.

Option 1 - Microsoft Teams Channel Charter Tab

From a BrightWork 365 project's Charter tab you have the option to create and associate a Microsoft Team Channel for each project, allowing for a logical segmentation of collaborative activities.

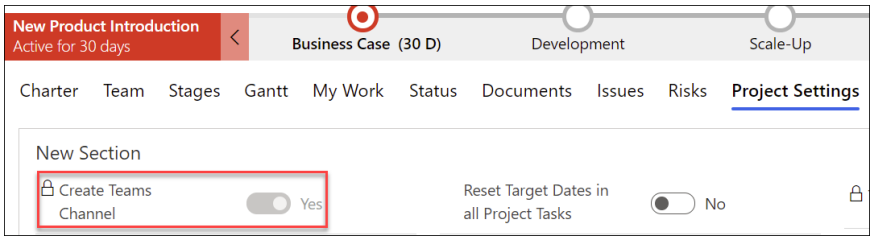
BrightWork 365 surfaces the project form in a Teams channel tab using the Teams Website app. However, since the Website app is no longer supported by Microsoft, the Project Charter tab will render as follows, and the app will need to be opened separately in a browser:



Create a Microsoft Teams Channel for a Project

Note In order for a Microsoft Teams channel to be created for a project, a Team must have been created previously for its associated program, and the program must have been configured to use the Team.

1. Within a project click the **Project Settings** tab and switch the **Create Teams Channel** slider to **Yes**.



2. When the process has completed you will find the new project Channel in the Microsoft Team associated with the project's program.

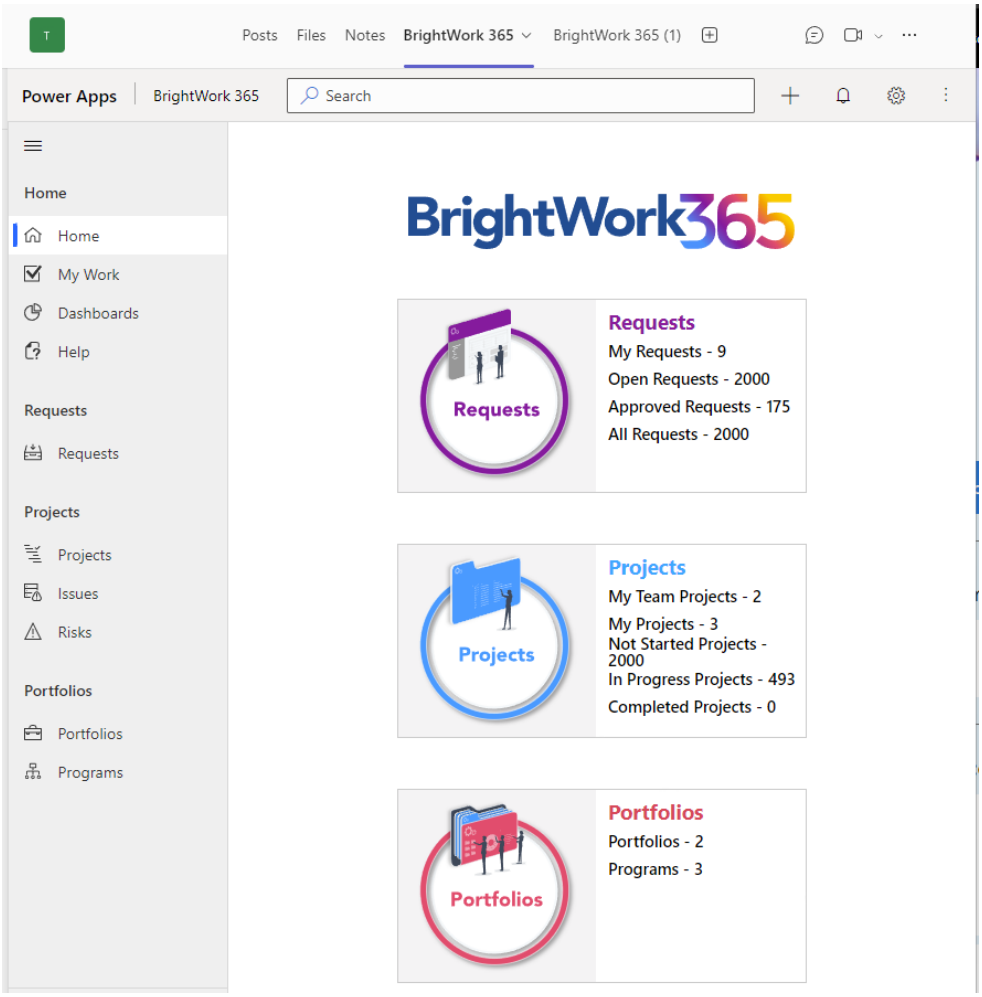
> **Tip** See the Document Management article for information about using the Microsoft Teams Channel 'Files' tab.

Option 2 - Power Apps Tab App

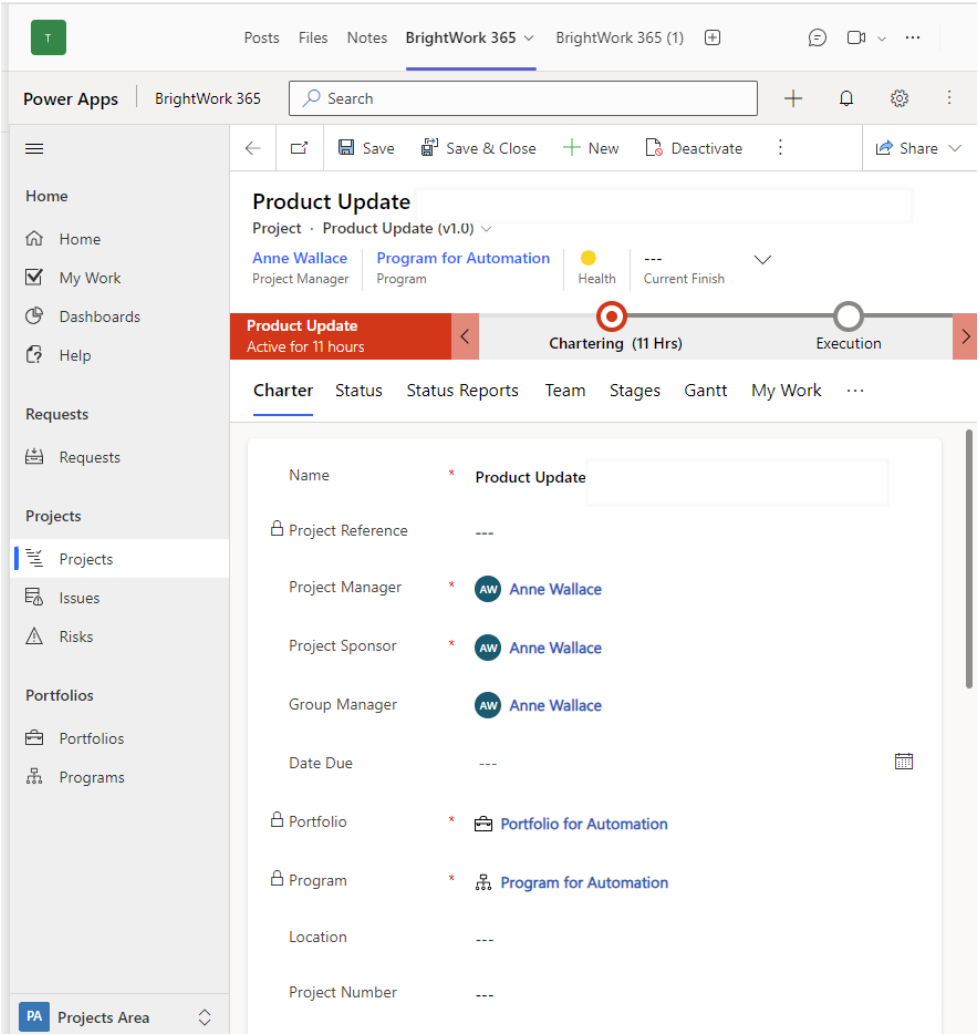
The Power Apps Tab app option allows you to surface BrightWork 365 into Teams. This option does not default to a specific record or view, however it can remember the last record or view you used.

For configuration steps, see Embed a model-driven app as tab app (preview) - Power Apps | Microsoft Learn.

The following is the initial state of the app when loaded for the first time:



When you open a project, it appears as follows:



If you navigate to a different channel/team/chat etc., and then return to this app, it will restore to whatever was the last page you were on in the app.

Option to Publish an App to the Local Teams App Store

There is an option in Teams to publish an App to your local tenant Teams App Store - for details see Publish Model-driven Power Apps to Microsoft Teams - Forward Forever .

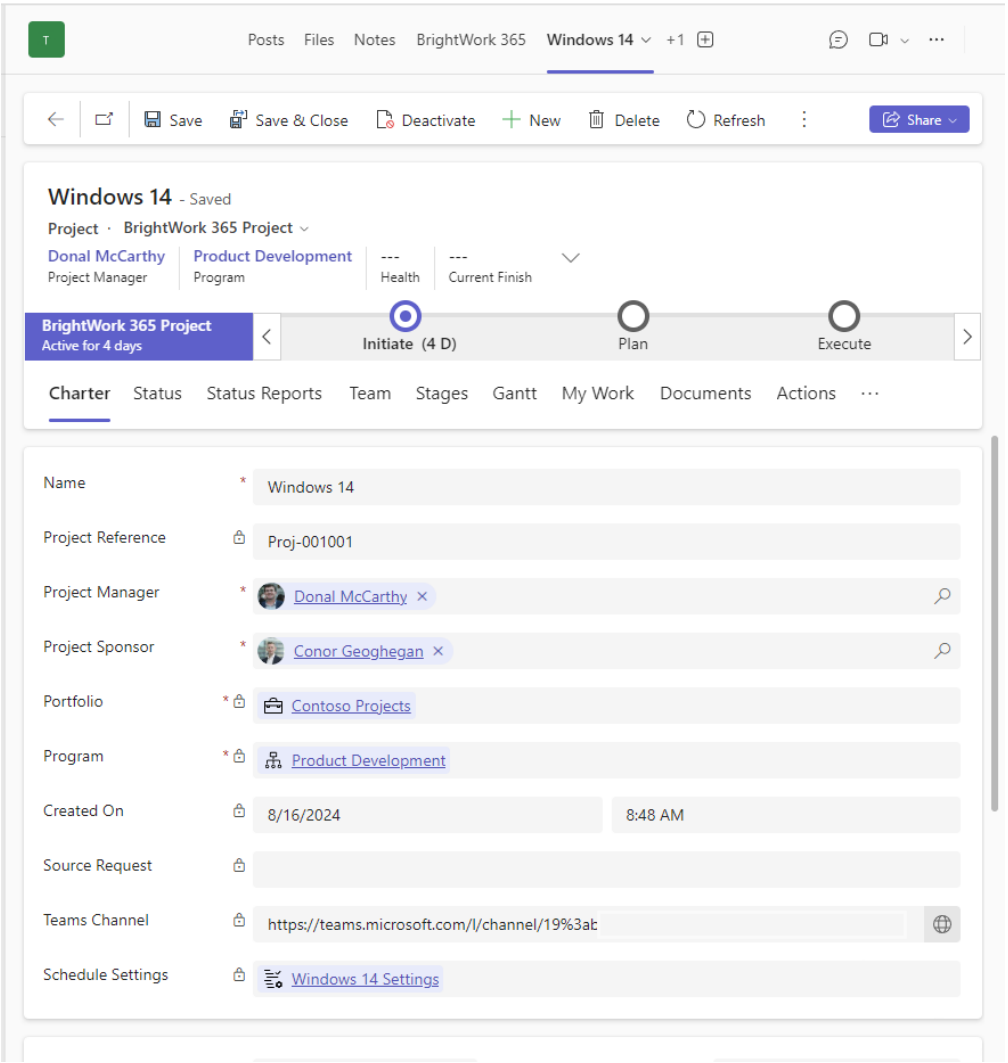
This can be a useful way to surface the App in Teams without users having to go through the process of adding the Power Apps app, selecting the Environment and then selecting the BrightWork 365 app. It publishes a Power Apps Tab App preconfigured with the Environment URL and AppId to a Teams package which can be uploaded and published on the local Teams App store.

Option 3 - Dynamics 365 Teams App

Caution

- The Dynamics 365 app only works against environments that had the "Enable Dynamics 365" option selected when the environment was created - this is not an option that can be enabled after the environment is created.
- Users need to have a Dynamics 365 license to use the Dynamics 365 Teams app. See https://learn.microsoft.com/en-us/dynamics365/sales/teams-integration/enable-record-linking#license-and-role-requirements

Note For additional technical details see:

- Overview of Microsoft Teams integration with Dynamics 365 apps | Microsoft Learn
- Basic Collaboration for Microsoft Teams with Dynamics 365 app | Microsoft Learn

With the Dynamics 365 Teams app it is possible to default to a record or project in BrightWork 365. For example, using the Dynamics 365 Tab app the following Teams tab is configured to point to a BrightWork 365 project record in the selected environment.