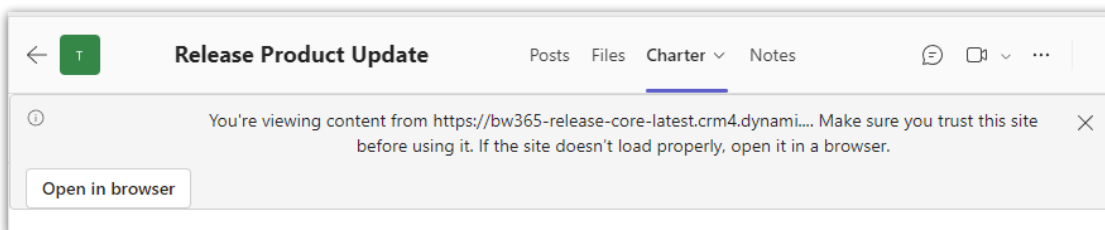# Microsoft Teams

Project Management Context

In this article we present several 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.

Interface 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 Team for a BrightWork 365 Program

In order for a Microsoft Teams Channel to be created for a Project, a Team must have been created previously for the Project's associated Program, and the Program must have been configured to use the Team.

Before creating a Microsoft Team for a BrightWork 365 program, check if one has already been created and assigned to the program:

1. In the Portfolios > Program section of the Site Map, click in the Statement tab of the relevant program and check the **Microsoft Team** field to see if there is already a Microsoft Team assigned to the program or if it is blank.

To create a Microsoft Team for a BrightWork 365 Program:

1. In Microsoft Teams create a Public Microsoft Team 'From scratch'.
2. Add the Owner of the Solution Flow **Get list of Microsoft Teams** as a Member of the new Microsoft Team; this is likely the service account used to install the BrightWork 365 solution as noted in our installation instructions.
3. In the relevant Program go to **Program Settings | Update Teams List** and switch the slider to **Yes**.
   Note: This process will run under the account of the Owner of the Solution Flow **Get list of Microsoft Teams**.

4. A process will run to populate the Teams table with the Teams that you have access to.
5. In the Program's **Statement** section choose the Microsoft Team you created; it may take a minute or so for the Team to be available for choosing.

Tip

- Every time you add a new Program ensure that it points to a Microsoft Team.
- After attaching a Microsoft Team to a program, child projects of the program will be able to create channels within that same Team.
- In newer versions of Microsoft Teams, Microsoft retired the ability to load websites inside the Teams client. These website links will open in a new browser tab instead.

Create a Microsoft Teams Channel for a Project

1. Within a Project click the **Project Settings** tab and switch the **Create Teams Channel** slider to **Yes**.
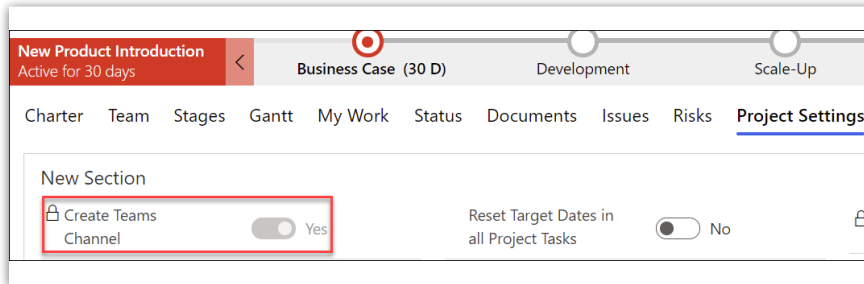
2. When the process has completed you will find the new project Channel in the Microsoft Team associated with the project's program.

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

Interface 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:
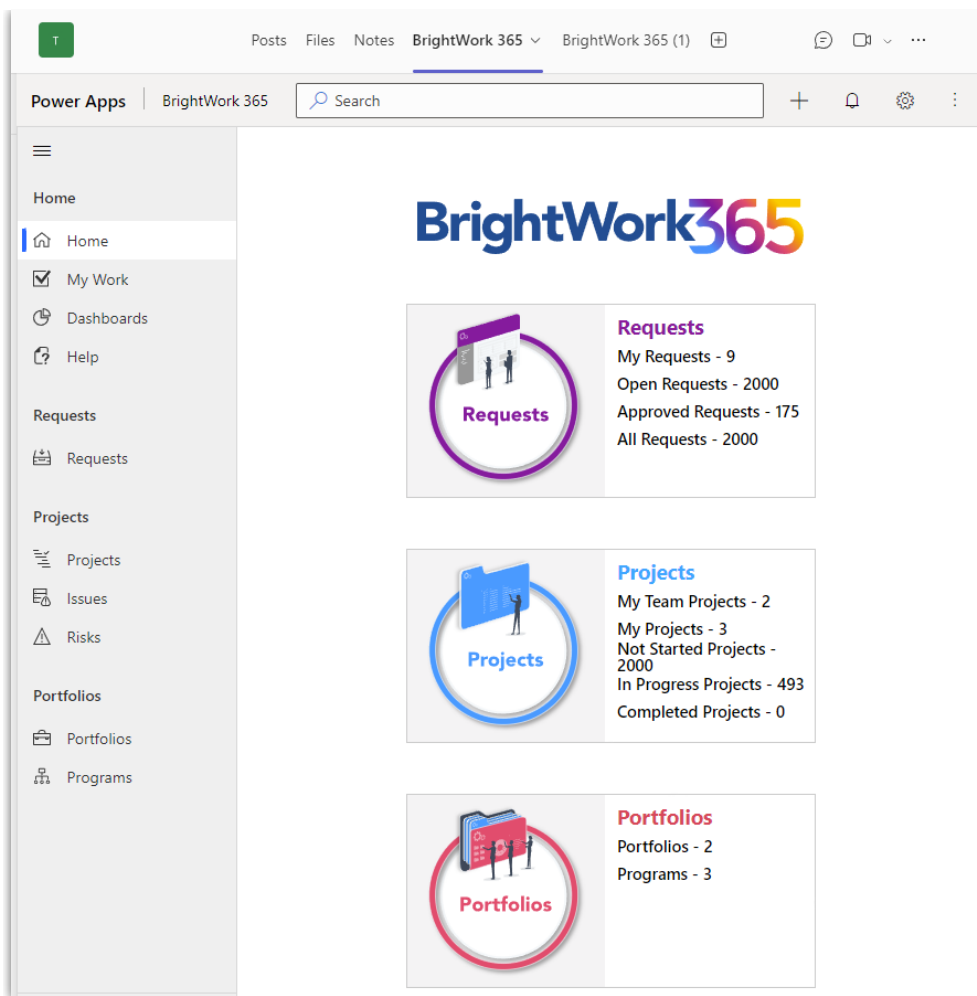
When you open a project, it appears as follows:
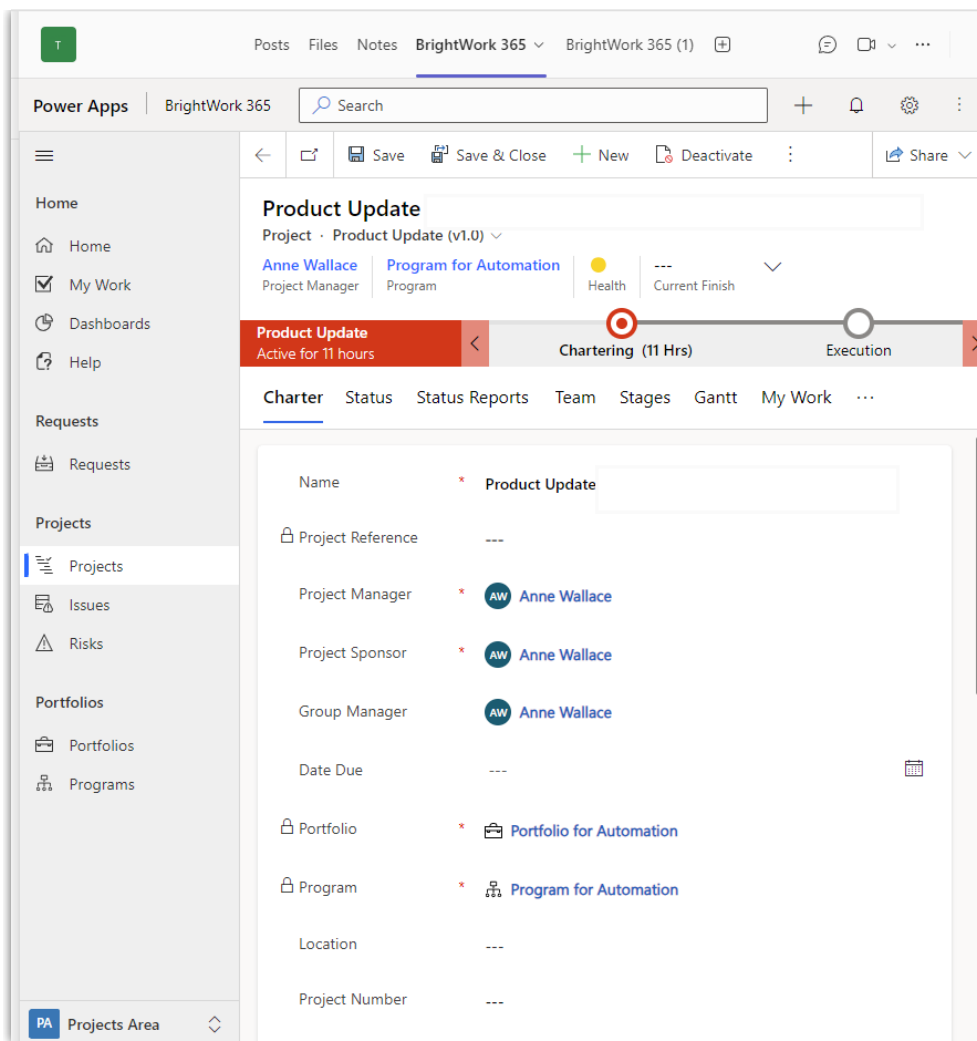
If you navigate to a different channel/team/chat etc., and then return to this app, it will restore to whatever was the last page you were on in the app.

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.

Interface Option 3 - Dynamics 365 Teams App

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.

Enable the Teams Meeting Option for BrightWork 365 Appointments
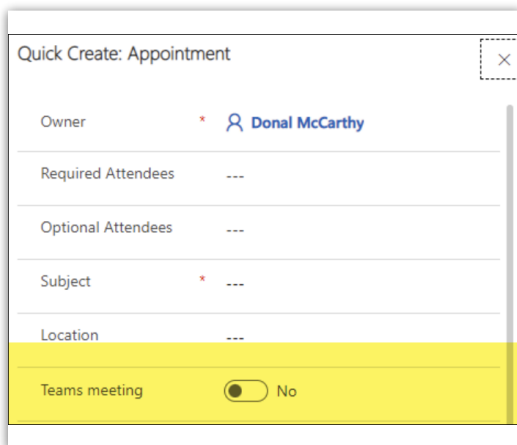
1. Navigate to https://admin.powerplatform.microsoft.com.
2. Open your environment.
3. Click Settings > Product > Features.
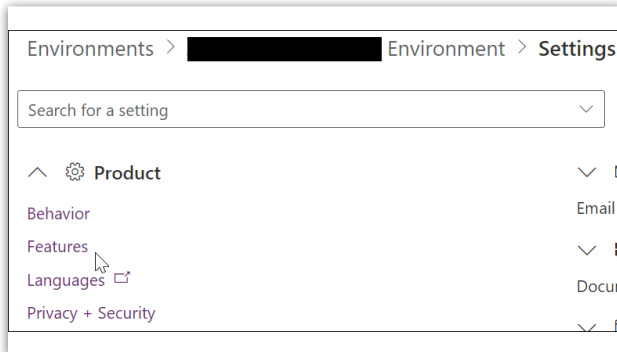
4. Turn on the Teams option.
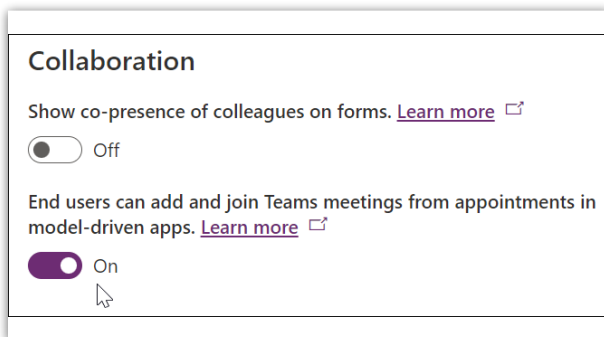
5. The **Teams meeting** option will now be available on the BrightWork 365 Appointment form.

Troubleshooting

Issue

Create Microsoft Teams Channel Flow failure.

Resolution

- Confirm the team's setting 'Allow member to create, update and remove tabs' is enabled.
- Check that the website app is not blocked - see Manage your apps in the Microsoft Teams admin center | Microsoft Learn. This needs to be done by a user with the Microsoft Teams admin role.
- Add the relevant security groups to the team.