

P R O C E S S M A N U A L

Document Code: PM-TMI

Teams

Integration

Handle Requests for administrator access via Microsoft Teams.

 **FastTrack** Software

 **Admin** By Request

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Introduction

Microsoft Teams is a workspace for all-round collaboration, bringing together messaging, file sharing, application sharing, and video conferencing capabilities.

To date, over 1 million organizations use Teams as their go-to business communication tool, so we've created a custom Admin By Request app for Teams which enables users to handle (i.e., approve and deny) Requests for administrative access from within a dedicated Teams channel. This manual provides a step-by-step guide on how to configure the application and integrate a core Admin By Request feature into your Teams environment.

Assumptions / Limitations

The tasks described in this manual assume that the user has access to Teams, the Admin By Request User Portal, and some familiarity with both environments.

! IMPORTANT: The access provided to users through our integrations **override User Portal settings**. Once the Teams integration described in this manual is configured, all users with access to the Teams channel created in Task A will have the ability to approve or deny requests via Teams, regardless of whether they have been granted these abilities in your Admin By Request User Portal Sub-Settings. Ensure you only add the integration to internal channels and reserve access for authorized users.

Prerequisites

To complete this integration, you first need to download the application .zip file by clicking the **Download** button on our Teams documentation webpage:

A red rectangular button with rounded corners and the text "Download App" in white.

Breakdown of Tasks

Four tasks are covered in this manual:

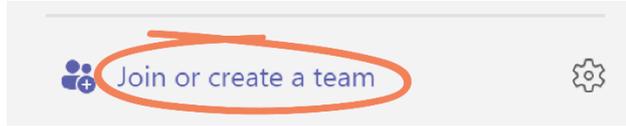
1. Task A: Create a Team
2. Task B: Upload the App File
3. Task C: Submit API Key
4. Task D: Manage Requests

Integration Tasks

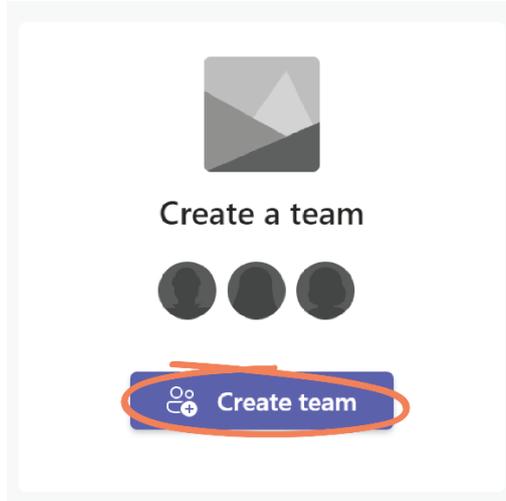
Task A: Create a Team

This integration requires a dedicated Admin By Request Team for Requests to be sent to, and managed from.

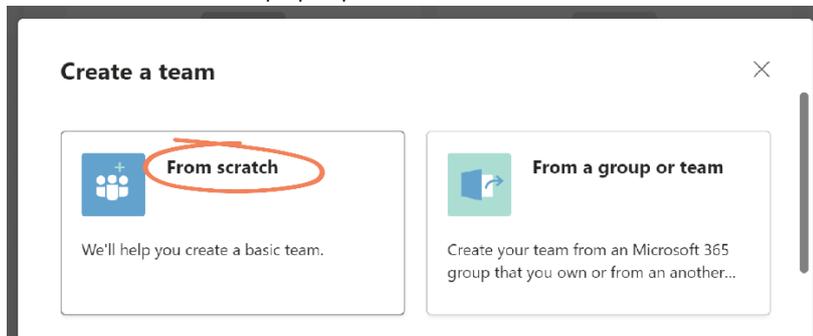
1. In Microsoft Teams, select **Join or create a team** from the bottom of the left-hand menu:



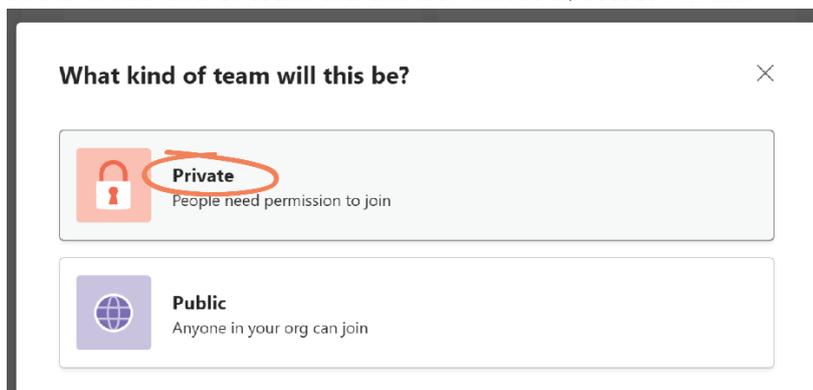
2. Select the **Create team** button in the *Create a team* option:



3. In the *Create a team* pop-up window, click **From scratch**:



4. In the *What kind of team will this be?* window, select **Private**:



! **IMPORTANT:** Choosing **Private** means users need permission from you to join the team. If you do not select **Private** for this team, anyone in your organization can join the channel and will have the ability to approve or deny Requests.

5. Give your new team a **Team name** (and optional **Description**) in the next window:

The screenshot shows a dialog box titled "Some quick details about your private team" with a close button (X) in the top right corner. Below the title, there are two input fields. The first is labeled "Team name" and contains the text "Admin By Request". The second is labeled "Description" and contains the text "Approve or Deny Requests for elevated privileges via this Teams channel." There is a checkmark icon to the right of the team name field.

📝 **NOTE:** In this example, our Team channel is named *Admin By Request* and our description reads, *Approve or Deny Requests for elevated privileges via this Teams channel*.

6. Click **Create**:

Create

7. **Skip** adding members for now:

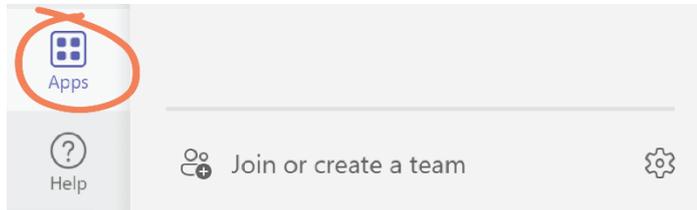
Skip

! **IMPORTANT:** Remember that this integration **overrides User Portal settings**, so all users with access to the Team channel created above will have the ability to approve or deny requests via Teams, regardless of whether they have been granted these abilities in your Admin By Request User Portal Sub-Settings.

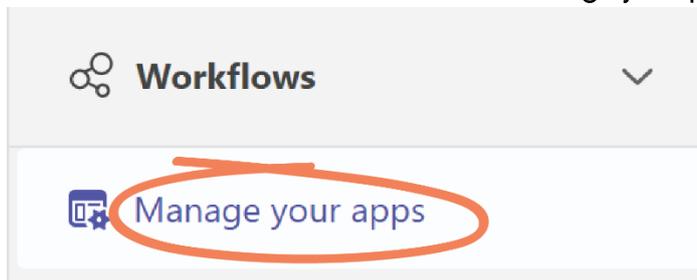
Task B: Upload the App File

The app used in this integration comes preconfigured and ready to 'plug-in-and-go'. This Task involves uploading the app folder obtained in the Prerequisite section of this manual and adding it to the Team created in Task A.

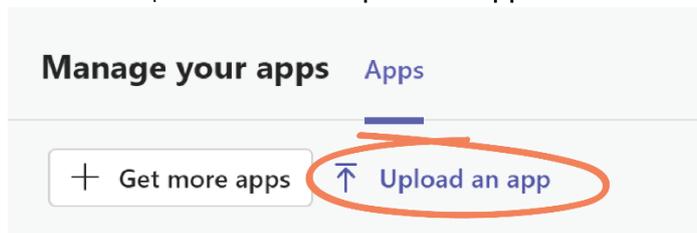
1. Select **Apps** from the bottom left-hand corner:



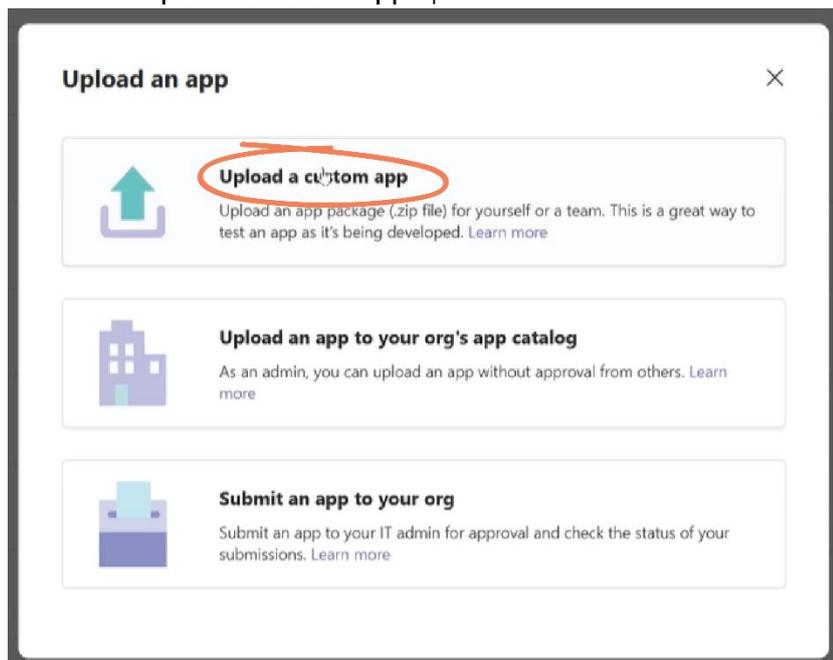
2. From the bottom left-hand menu, select **Manage your apps**:



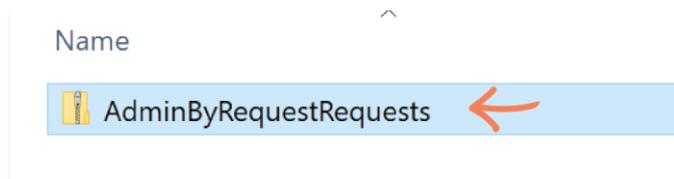
3. From the top menu, select **Upload an app**:



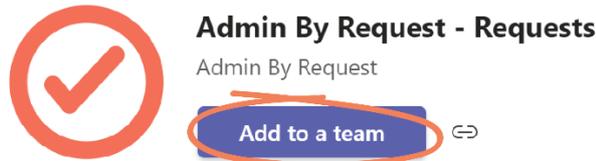
4. Select the **Upload a custom app** option:



5. Locate and select the *Admin By Request .zip folder* downloaded in the Prerequisite section of this document:



6. Select the **Add to a team** button:

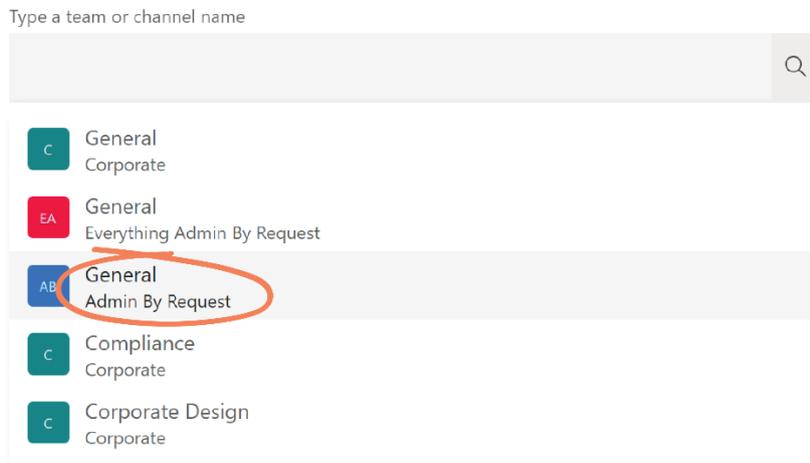


7. Use the search box to locate and select the team created in Task A of this process manual (i.e., *Admin By Request*):



Add Admin By Request - Requests to a team

Admin By Request - Requests will be available for the entire team, but start by setting it up in a channel. The app may post messages here; you can also @mention Admin By Request - Requests to chat with it.



8. Select the **Set up a bot** button:



Task C: Submit API Key

The app used in this integration comes preconfigured and ready to 'plug-in-and-go'. This Task involves adding the app from you Admin by Request User Portal and allowing it to form a connection to the Slack channel.

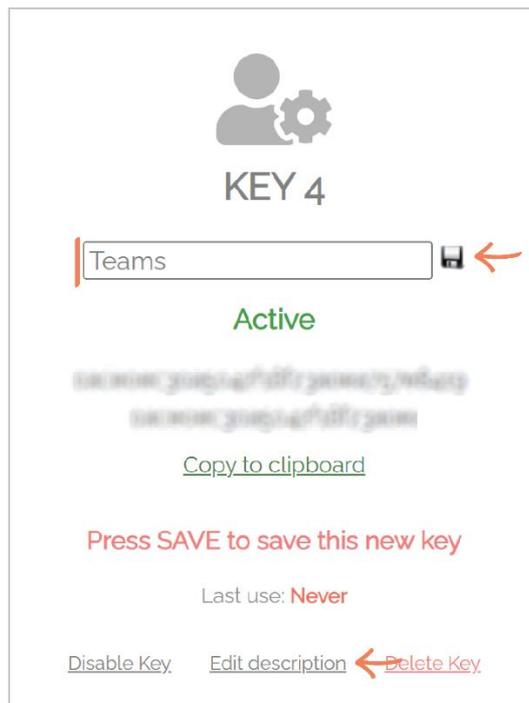
1. In your Admin By Request User Portal, navigate to **Settings > Windows Settings > Data > API Keys**:



2. Select the **Add New** button:



3. Click the **Edit Description** button, type *Teams* as the description, and click the **Save** icon:



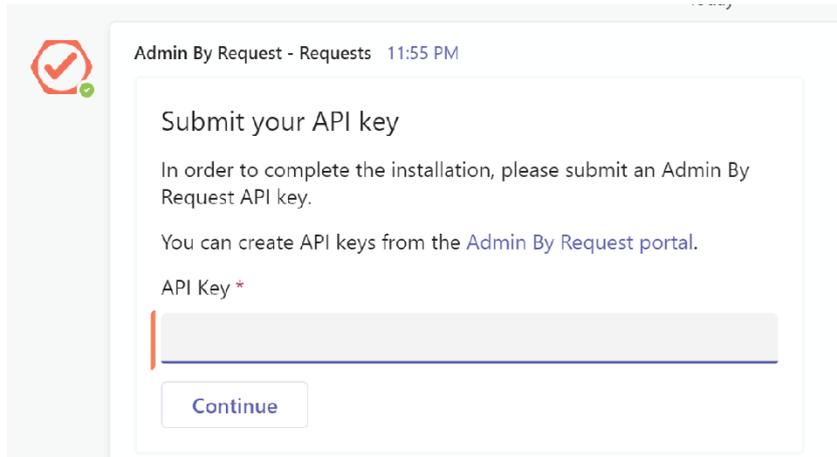
- !** **IMPORTANT:** After adding a new API Key you must then ensure you click the general Save button (i.e., outside of the individual API Key):



4. For the new API Key just created, select **Click to show**, and then **Copy to clipboard**:



5. Navigate back to Teams and paste the copied **API Key** into the *API Key* field in the Teams channel:



Admin By Request - Requests 11:55 PM

Submit your API key

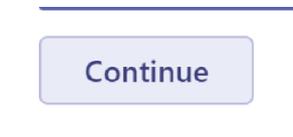
In order to complete the installation, please submit an Admin By Request API key.

You can create API keys from the [Admin By Request portal](#).

API Key *

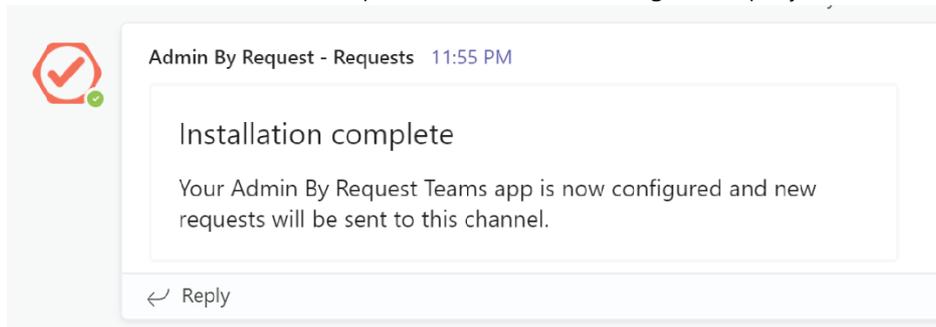
Continue

6. Click **Continue**:



Continue

7. When the connection is complete, a success message is displayed:



Admin By Request - Requests 11:55 PM

Installation complete

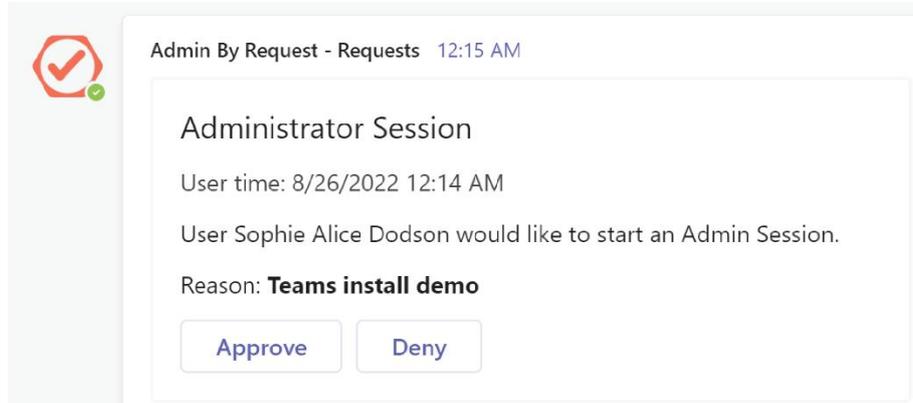
Your Admin By Request Teams app is now configured and new requests will be sent to this channel.

← Reply

Task D: Manage Requests

This Task demonstrates how to use the new Teams channel to approve or deny Requests made by your users.

1. New / pending Requests now appear in Teams, in our newly created channel displaying the time the request was made, the name of the user, and the reason provided for making the Request (if the Reason feature is enabled in your ABR settings):



2. Click **Approve** or **Deny** – the same way you would in the Requests page of your Admin By Request User Portal:



 **NOTE:** The chosen action is reflected in the channel:

