

# Setting Up Agiloft for Microsoft Teams

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Consult this page for information about how to set up Agiloft with Microsoft Teams.

## Preparing Your KB

Before you can properly install and use Agiloft in Microsoft teams, there are a few things that need to be done in your KB. If you've set up ConvoAI, chances are you've already completed these steps.

1. Go to **Setup > System**. Then, click **Manage Global Variables**.
2. Click the Variables with Default Values tab and search for Hotlink Server Root URL with your browser's Find tool (Ctrl+F).
3. Edit the variable.
4. Copy the base URL, which starts with `https://` and ends with `.com/` for your KB and input it in the Global Variable Value section.

Use this input to enter the value of this global variable or constant.

Global Variable Value:

`https://example.agiloft.com/`

Default Value:

5. Click Finish.
6. Go to **Setup > Integration**, and then click **Deploy** under Agiloft Bot. When the deployment finishes, the window will refresh and you will see an option to Resubmit, which you don't need to click.

Now, add your users to the Agiloft Bot Users group.

1. Navigate to the People table.
2. Search for a user you'd like to add.
3. Edit the user record and scroll down to Group.
4. Click the search icon next to Group and select Agiloft Bot Users.
5. Click OK.
6. Click Save.
7. Repeat for all ConvoAI users.

Now, it's time to make the app available in Teams.

# Adding Agiloft to Microsoft Teams

Follow these steps to install the app individually. Admins can install the app for groups of users by following the directions at this [Microsoft web page](#). Admin installation should still use the zip file from step 1 below.

1. Download the [agiloftbot.zip](#) file.
2. Open Microsoft Teams.
3. Click Apps in the left pane.
4. Click Manage your apps.
5. Click Upload an app.
6. Click Upload a custom app in the bottom left-hand corner and choose the [agiloftbot.zip](#) file. However, if the Upload a custom app option doesn't appear, a user in your organization with admin credentials in Team must grant your account permission to install custom apps. For information about this, visit [Microsoft support](#).
7. Click Add.

When you have added the app successfully, it will appear on the left-hand sidebar of Teams. If it doesn't appear, you might need to click the three-dot menu to view the app.

## Connecting to Agiloft from Teams

Follow this method to make a specific team or channel appear as a recipient for a MS Teams Notification action in your KB.

1. Once the bot is set up, you can then connect with Agiloft in your team or channel. Open a channel you'd like to use with Agiloft, and begin to type @Agiloft in the conversation box. Select the Agiloft icon when you see it, and then begin to type `connect`. You should see a prompt about connecting to a KB. Click the prompt and then send the message.
2. Click Sign In and enter your KB credentials.
3. Click OK. In Teams, you should receive a message that says you have successfully logged in to Agiloft.
4. Repeat steps 1 through 3 in each channel you'd like to appear as a recipient for MS Teams Notification actions.

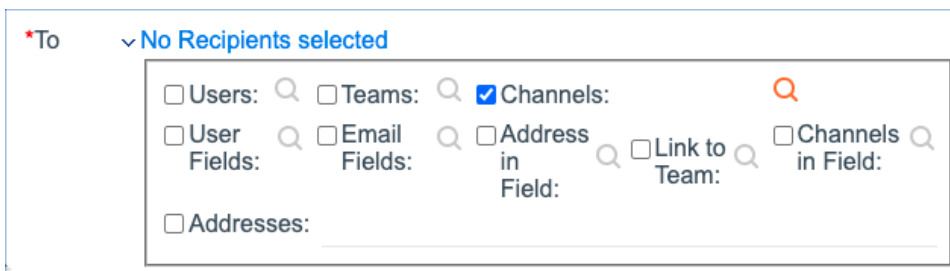
The Agiloft app is now connected with the specified team. You can now select the team as a recipient when creating Notification actions.

# Configuring Actions

Once Agiloft has been set up in Teams, it's time to tell it what to do. Agiloft for Teams uses specific Notification actions configured within the KB to determine how the Teams bot behaves.

Follow the steps below to create a Notification action for Teams.

1. Create an action. For Teams notifications, this is likely from within a rule.
2. Click Create Notification Action.
3. On the General tab, make sure to select Send Microsoft Teams Message under Delivery Method.
4. Click Next.
5. Under Contract MS Teams Templates, click New.
6. In the To field, choose your recipient type. This options determines who receives the notification you are about to configure. You can send notifications to users and teams, similar to email templates, or you can select Microsoft Teams channels. To notify specific users, make sure they use the same email address in Teams and in their KB profile. Users must have previously connected to Agiloft in Teams to receive Teams messages. Each option is described below the image:



\*To    ▾ No Recipients selected

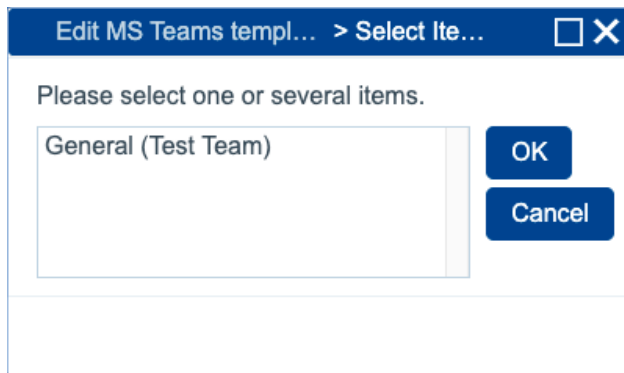
☐ Users:    ☐ Teams:    ☒ Channels:    🔍

☐ User Fields:    ☐ Email Fields:    ☐ Address in Field:    ☐ Link to Team:    ☐ Channels in Field:    🔍

☐ Addresses: \_\_\_\_\_

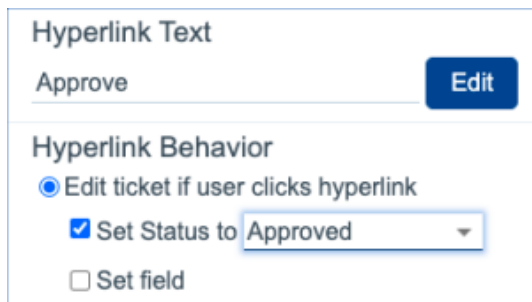
- a. Users: Sends a notification to the users selected in the field.
- b. Teams: Sends a notification to the users in the Agiloft teams selected in the field.
- c. Channels: Sends a notification to the Microsoft Teams channel selected in the field.
- d. User Fields: Sends a notification to the users populated in the selected Agiloft user field.
- e. Email Fields: Sends a notification to the emails populated in the selected Agiloft email field.
- f. Address in Field: Sends a notification to the emails that are populated in the selected Agiloft text field.
- g. Link to Team: Sends a notification to the users in the Agiloft teams that are populated in the selected Agiloft Team field.
- h. Channels in Field: Sends a notification to the Microsoft Teams channels that are populated in the selected Agiloft text field.
- i. Addresses: Sends a notification to the designated email address.

7. For Microsoft Teams messages, you are likely going to select Channels. After clicking the look-up icon, the channels that appear in the multi-choice list depend on which teams you have connected to your KB using the steps in Connecting to Agiloft from Teams.



The screenshot shows a dialog box titled "Edit MS Teams templ... > Select Item...". Inside, it says "Please select one or several items." Below this is a list box containing "General (Test Team)". To the right of the list box are two buttons: "OK" and "Cancel".

8. In the Content field, add the message that you'd like the notification in Teams to display, such as "Click to approve the contract."
9. You can add fields and buttons to the notification as well. For example, to add a button that allows you to automatically Approve a record:
  - a. Click View Record, Edit Record.
  - b. Click New Button.
  - c. Name the button Approve and set the Status to Approved.
  - d. Click Finish.



The screenshot shows a configuration window for a "Hyperlink Text" button. The "Hyperlink Text" section has the text "Approve" and an "Edit" button. The "Hyperlink Behavior" section has two options: "Edit ticket if user clicks hyperlink" (selected with a radio button) and "Set field" (unselected with a checkbox). Under the selected option, there is a checkbox labeled "Set Status to" followed by a dropdown menu currently showing "Approved".

10. Click Next.
11. Name the template and click Finish.
12. Select the new Contract MS Teams Template record and click Next.
13. On the Options tab, determine whether or not you want this notification to overwrite a previous notification of your choosing. For example, once a Contract record has been approved, you may want to send a notification message saying "The contract has been approved." that updates the original "Click here to approve the contract." message.
14. Once you've made your choices, click Finish.

Once the notification action has been created, you can attach it to action buttons or rules that can notify the appropriate user or group of users as the workflow progresses.

