



Microsoft Teams Integration

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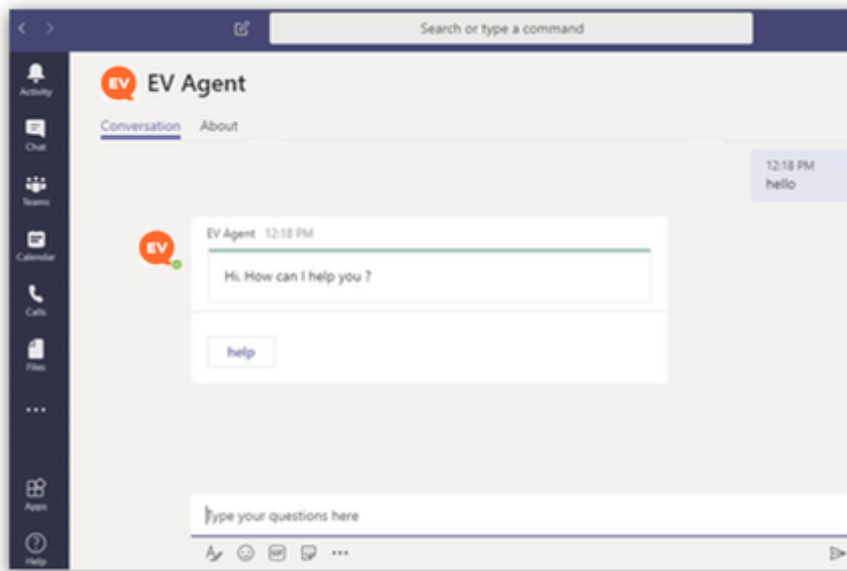
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Caution: Use the Teams Developer Portal to deploy your *Azure Bot* app in MS Teams. This is because App Studio has been phased out by Microsoft from **31 December 2021** onwards.

To help you set up this integration, you can download the relevant documentation. [See List of files to download](#)

OVERVIEW OF THE INTEGRATION

Microsoft Teams integration enables you to add a [Service Bots](#) virtual agent to Microsoft Teams. Users and corporate employees will both be able to communicate with this virtual agent.

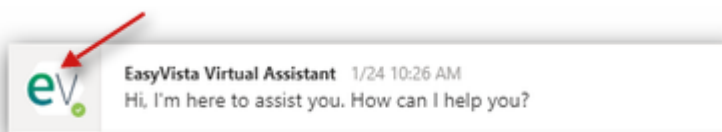


This is performed via two products.

- [Azure Bot Service](#): [Microsoft Azure](#) service specially designed for developing bots using *Azure Bot* apps. Bots are connected to channels in order to make them available in different solutions, including the MS Teams platform.
- [Microsoft Teams](#): A collaborative platform that enables discussions among users or teams within a given company. These discussions can also be with a bot, and in particular with the Service Bots virtual agent.

NOTES

- The avatar of the Service Bots virtual agent in MS Teams has a hexagonal shape that is easily identifiable.



- Users can search for the virtual agent by name in the search field at the top of the MS Teams window if they belong to a team where the *Azure Bot* app is installed. If this is not the case, they can search for the virtual agent in the MS Teams app catalog and run the *Azure Bot* app.
- Depending on the scope of the *Azure Bot* app, the virtual agent may be mentioned in a team discussion using the *@shortname* instruction.

CAUTION

- The integration requires a configuration outside Self Help and Service Bots.
 - You must first ensure that the different platforms are able to communicate.
 - Proxies may prevent the integration from working correctly.

INTEGRATION PROCESS

You can integrate a Service Bots virtual agent in Microsoft Teams in four steps:

- **Step 1:** Create an *Azure Bot* app in Azure Bot Service
- **Step 2:** Associate the Service Bots virtual agent with the *Azure Bot* app in Self Help
- **Step 3:** Test the Service Bots virtual agent in MS Teams
- **Step 4:** Deploy the *Azure Bot* app in MS Teams

STEP-BY-STEP INTEGRATION PROCESS

Prerequisites

1. The Service Bots virtual agent must first be created.

 See [How to create a virtual agent](#)

2. The [Self Help projects](#) associated with the Service Bots virtual agent must be accessible to the user, *AuthenticatedUser*.

3. The different platforms used in the integration must be able to communicate.

Create an *Azure Bot* app in Azure Bot Service

Step 1: Create a new *Azure Bot* app

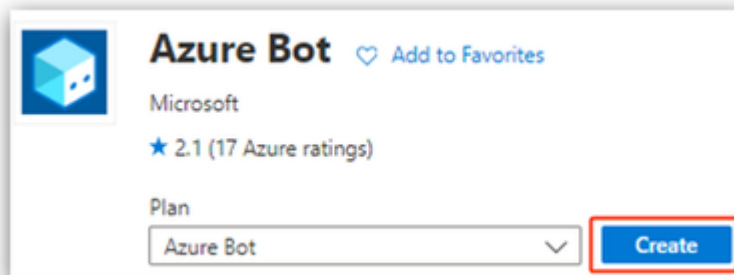
1. Log in to the [Microsoft Azure portal](#).

2. Click *More services* to the right of the services displayed. Next, select *Categories > AI + Machine Learning* in the menu pane.

3. Select *Bot Services* in the right pane and click + *Create* in the toolbar.

4. Click *Load more* at the bottom of the page and select the *Azure Bot* service.

5. Click *Create*.



The window for creating the new app will appear.

Step 2: Enter information on the new Azure Bot app

1. Enter information on the app.

Create an Azure Bot ...

Basics Tags Review + create

Project details

Select the subscription to manage deployed resources and costs. Use resource groups like folders to organize and manage all your resources.

Bot handle *

Subscription *

Resource group * [Create new](#)

Pricing

Select a pricing tier for your Azure Bot resource. You can change your selection later in the Azure portal's resource management. Learn more about available options, or request a pricing quote, by visiting the [Azure Bot Services pricing](#)

Pricing tier * Free [Change plan](#)

Microsoft App ID

A Microsoft App ID is required to create an Azure Bot resource. If your bot app doesn't need to access resources outside of its home tenant and if your bot app will be hosted on an Azure resource that supports Managed Identities, then choose option User-Assigned Managed Identity so that Azure takes care of managing the App credentials for you. Otherwise, depending on whether your bot will be accessing resources only in its home tenant or not, choose either Single tenant or Multi tenant option respectively.

Type of App

An App ID can be automatically created below or you can manually create your own, then return to input your new App ID and secret in the open fields. [Manually create App ID](#)

Creation type Create new Microsoft App ID Use existing app registration

[Review + create](#) < Previous Next : Tags >

Bot handle: Unique ID of the bot.

ezvsample

- You cannot modify this value once the bot is created.
- Copy the ID and paste it in your text editor in order to store it temporarily. It will be required when specifying the [Service Bots endpoint](#) and when [associating the virtual agent with the Azure Bot](#) app.

Subscription: Name of your subscription to the Azure service.

Resource group: Resource group associated with the Azure solution.

- You can click [Create new](#) to create a new one.

Pricing tier: Pricing tier of your subscription to the Azure service.

- F0: Free-of-charge usage.
- S1: Usage with an SLA.

Microsoft App ID:

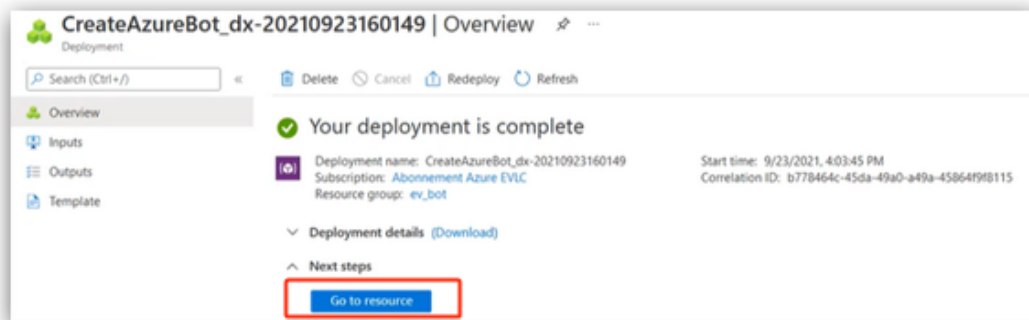
- Type of App:** Select the relevant option, i.e. *Multi Tenant* or *Single Tenant*.
Note: If you select *Single Tenant*, the tenant ID will be required when [associating the virtual agent with the Azure Bot](#) app.
- Creation type:** Select *Create a new Microsoft App ID*.

2. Click Review + Create.

- Correct the errors, if any.

3. Click Create.

- A summary of the information will appear.

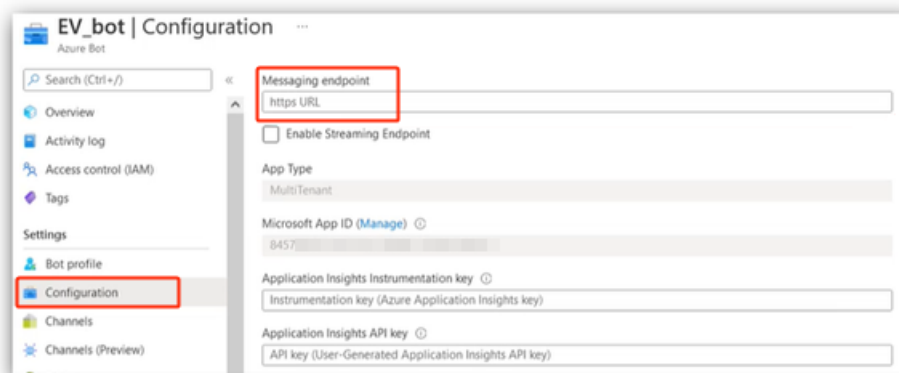


- The *Azure Bot* app ID and secret (password) will be generated.
- The *Azure Bot* app will be deployed on the Azure portal.

Step 3: Specify the Service Bots endpoint

1. Click Go to resource.

2. Select *Configuration* in the menu pane.



3. Specify the **Messaging endpoint** field.

Replace the values highlighted in **yellow** with the values of your environment.

- **{ServerAddress}**: Address of the Self Help server where the Service Bots virtual agent was created.
- **{BotHandle}**: Bot ID. Copy and paste the ID you stored in your text editor when creating the app in [step 2](#).

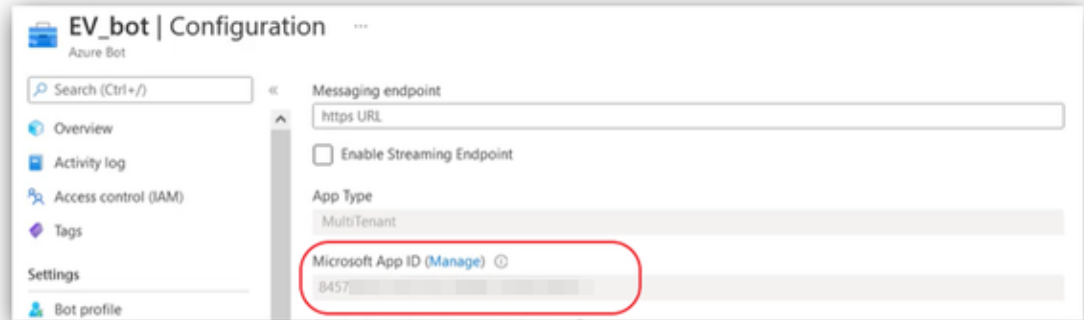
```
https://{ServerAddress}/selfhelp/api/servicebots/msteams-agents/{BotHandle}
```

4. Click OK.

Step 4: Retrieve the new *Azure Bot app ID and secret (password)*

Step 4.a: Retrieve the app ID

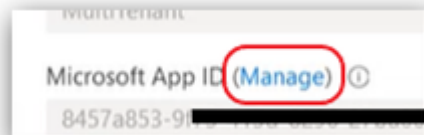
1. Copy the *Azure Bot* app ID in the **Microsoft App ID** field and paste it in your text editor in order to store it temporarily. It will be required when [associating the virtual agent with the *Azure Bot*](#) app and when [deploying the app in MS Teams](#).



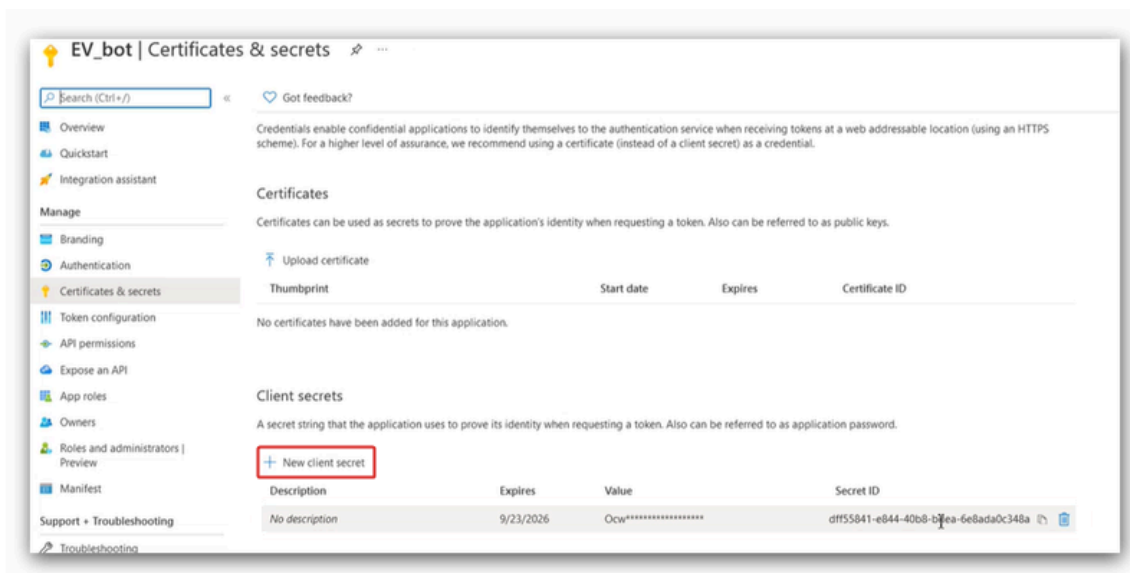
Step 4.b: Generate and retrieve the client secret

Note: The client secret that was automatically generated when the new *Azure Bot* app was created cannot be copied. You must create a new one.

1. Click *Manage* next to the **Microsoft App ID** field.



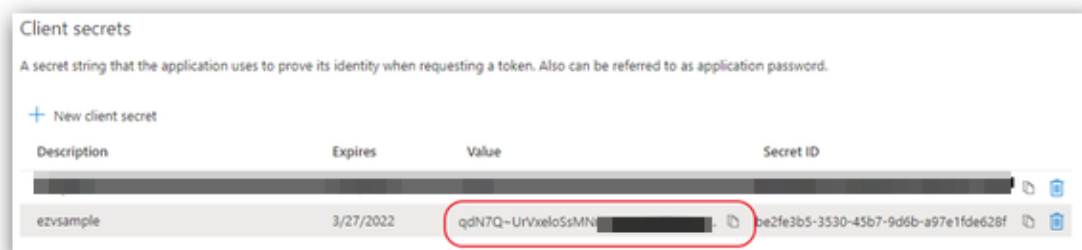
- Click + *New client secret* at the top of the **Client secrets** section.



The window for creating a client secret will appear.

The 'Add a client secret' dialog box is shown. It has a title bar with a close button. The 'Description' field contains 'ezvsample'. The 'Expires' field is a dropdown menu showing 'Recommended: 6 months'. At the bottom, there are 'Add' and 'Cancel' buttons.

- Enter the description and expiry date of the new client secret.
- Click Add.
 - The client secret of the new *Azure Bot* app will be generated.
 - The window for creating the client secret will close.
 - The new client secret will appear in the list of client secrets.
- Copy the client secret displayed in the **Value** field and paste it in your text editor in order to store it temporarily. It will be required when [associating the virtual agent with the Azure Bot](#) app.



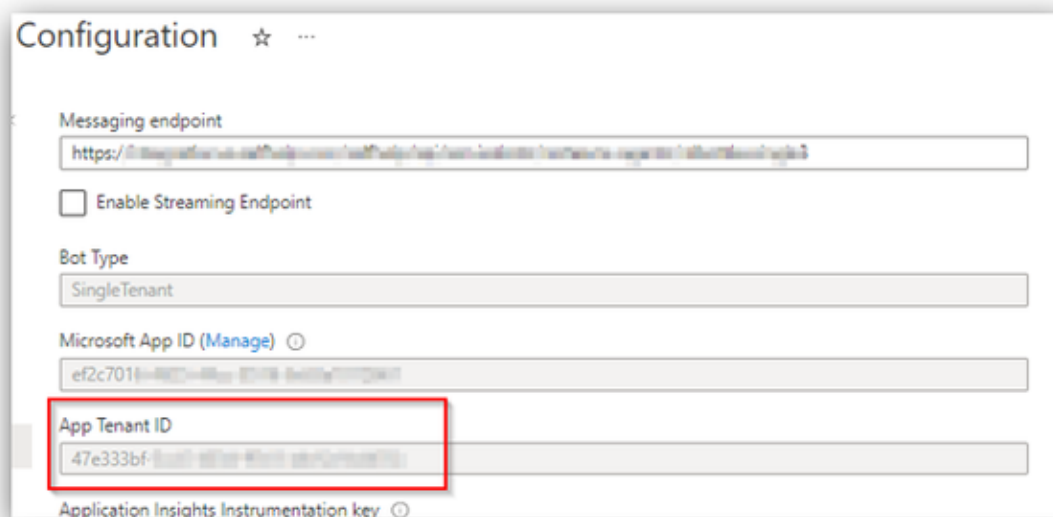
6. Return to the window for creating the new *Azure Bot* app.

Step 4.c: Retrieve the *Azure Bot* app tenant ID

Note: Only if you selected the *Single Tenant* option in the **Microsoft App ID > Type of App** field.

1. Select *Configuration* in the menu pane.

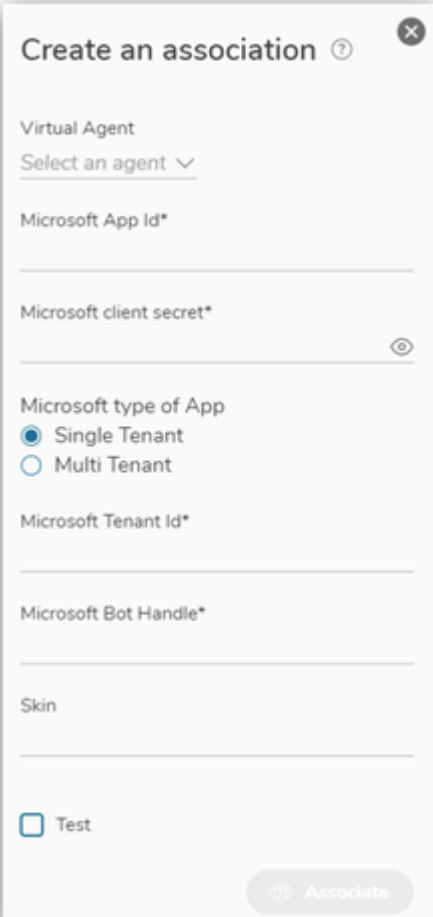
2. Copy the tenant ID in the **App Tenant ID** field and paste it in your text editor in order to store it temporarily. It will be required when [associating the virtual agent with the *Azure Bot*](#) app.



The screenshot shows the 'Configuration' window for an Azure Bot app. The 'App Tenant ID' field is highlighted with a red box. The 'Microsoft App ID (Manage)' field is also visible, containing the value 'ef2c701f-4d22-44e9-8718-6411e77702d1'. The 'Bot Type' is set to 'SingleTenant'. The 'Messaging endpoint' is a long URL starting with 'https://'. The 'Enable Streaming Endpoint' checkbox is unchecked. The 'Application Insights Instrumentation key' field is partially visible at the bottom.

Associate the Service Bots virtual agent with the Azure Bot app in Self Help

1. Select [Channels > MS-Teams](#) in the [Online Studio](#) menu.
2. Click Create an association.
3. Specify the information related to the new *Azure Bot* app.



The screenshot shows a 'Create an association' dialog box with the following fields and options:

- Virtual Agent:** A dropdown menu labeled 'Select an agent'.
- Microsoft App Id*:** A text input field.
- Microsoft client secret*:** A text input field with a toggle icon for visibility.
- Microsoft type of App:** Radio buttons for 'Single Tenant' (selected) and 'Multi Tenant'.
- Microsoft Tenant Id*:** A text input field.
- Microsoft Bot Handle*:** A text input field.
- Skin:** A text input field.
- Test:** A checkbox.
- Associate:** A button at the bottom right.

Virtual Agent: Select the Service Bots virtual agent you want to associate with MS Teams.

Microsoft App ID: Copy and paste the *Azure Bot* ID you stored in your text editor when creating the app in [step 4.a](#).

Microsoft client secret: Copy and paste the client secret you stored in your text editor when creating the *Azure Bot* app in [step 4.b](#).

Microsoft Type of App: Select *Single Tenant* or *Multi Tenant* depending on the option you selected when creating the *Azure Bot* app in [step 1.2](#).

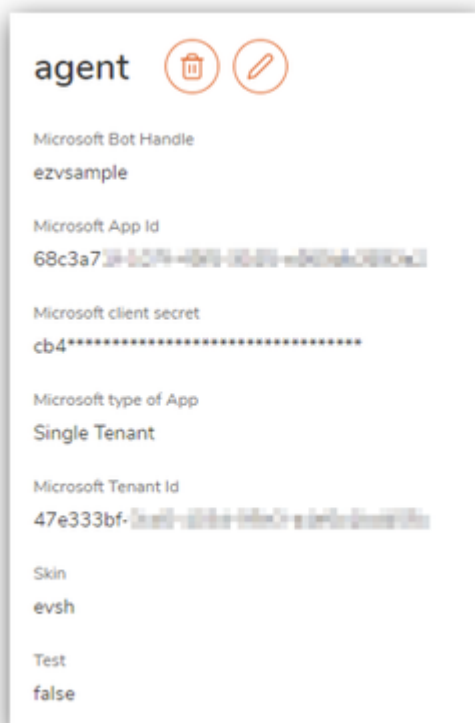
Microsoft Tenant Id: (Note: Only if you selected the *Single Tenant* option) Copy and paste the tenant ID you stored in your text editor when creating the *Azure Bot* app in [step 4.c](#).

Microsoft Bot Handle: Copy and paste the bot ID you stored in your text editor when creating the app in [step 2](#).

Skin: Skin used for [Self Help procedures](#) that are displayed in the virtual agent's side pane ([Dialog Friendly metadata](#) = *False*).

4. Click Associate.

- The virtual agent will be associated with MS Teams via the *Azure Bot* app.
- Information on the *Azure Bot* app will appear in the Details pane when you click the name of the virtual agent.

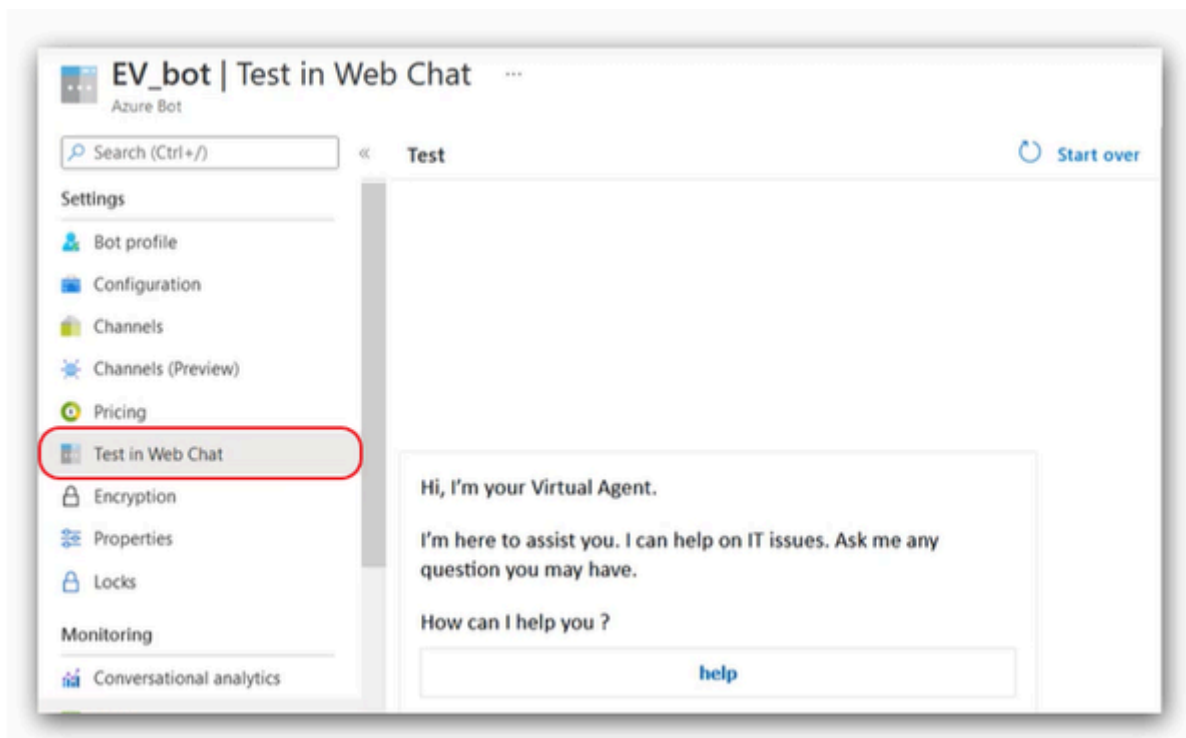


Test the Service Bots virtual agent in MS Teams

Step 1: Test the virtual agent using the *Web Discussion channel*

1. Go to the Azure portal.
2. Select the new *Azure Bot* app.
3. Click *Test in Web Chat*.

A conversation panel will appear to the right.

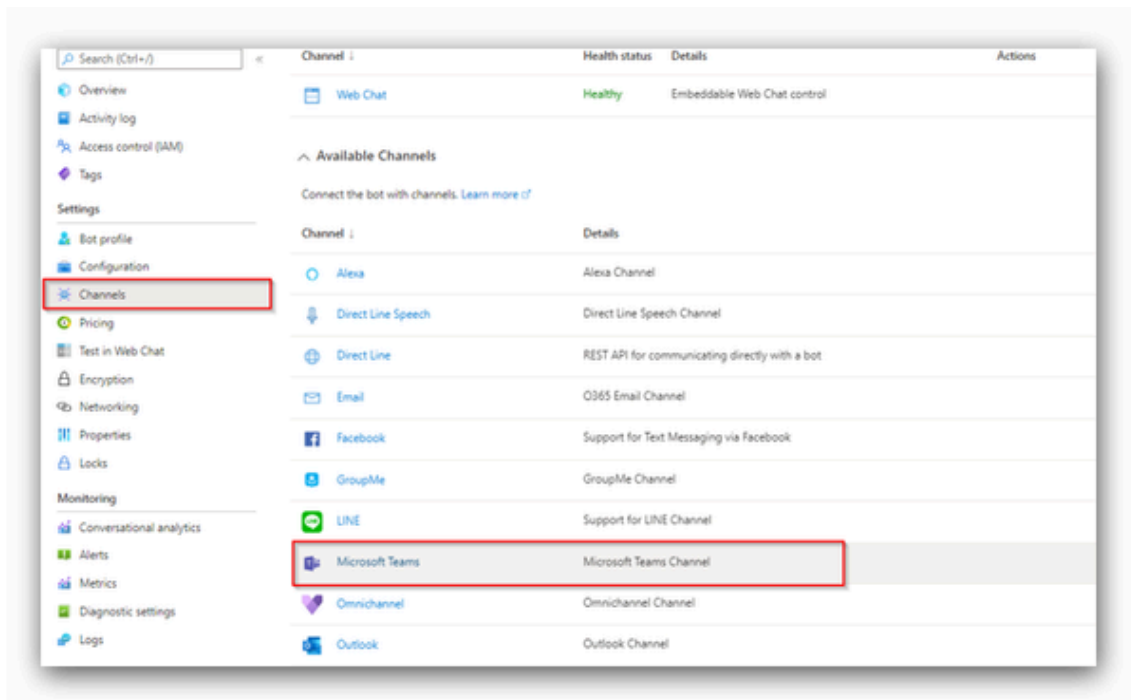


4. Check that the *Azure Bot* app interacts correctly by typing different messages in the conversation panel.

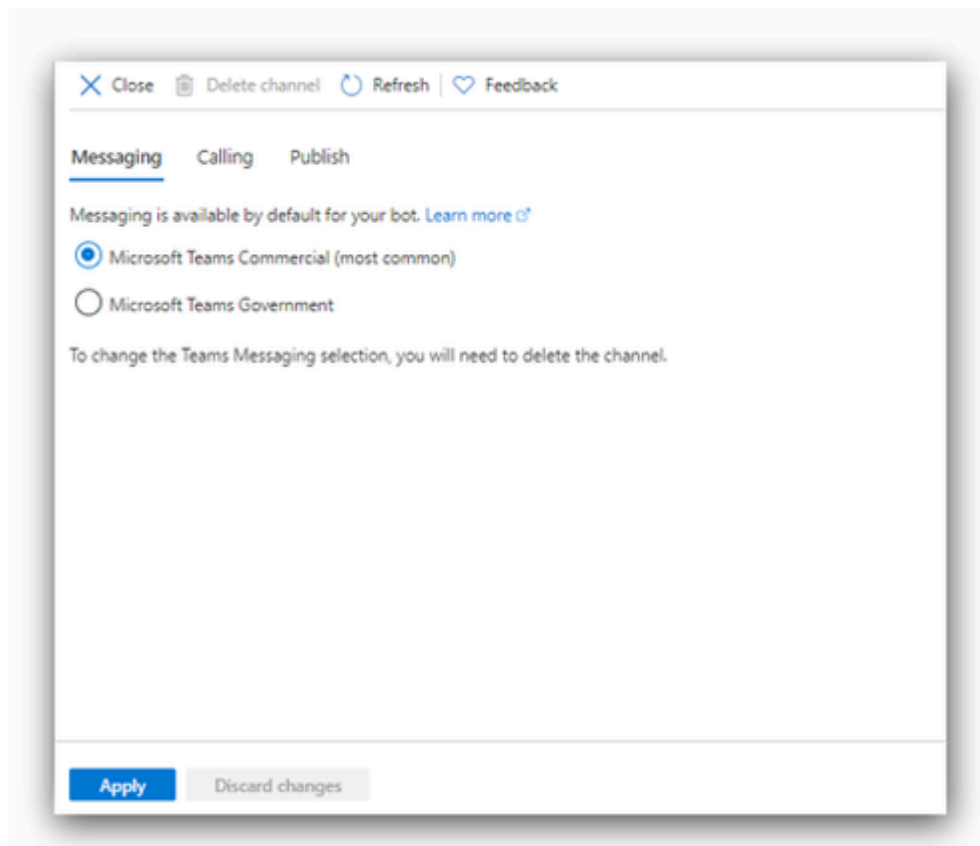
Step 2: Test the virtual agent using the *MS Teams channel*

1. Add the *MS Teams* channel to the list of channels.


- Select *Channels* >  *Microsoft Teams*.





- Read the terms of use and click Accept.
- Select the *Microsoft Teams Commercial* option and click Apply.



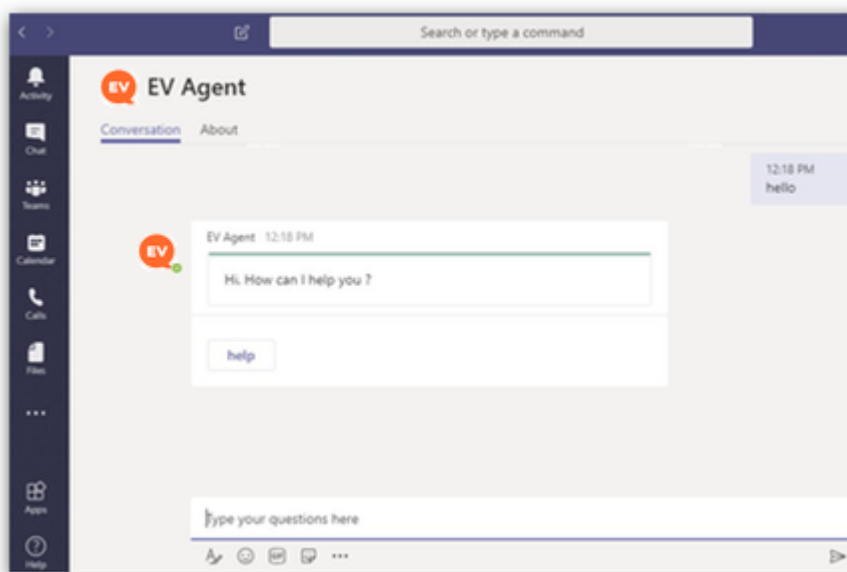
2. Display the new *MS Teams* channel.

- Return to the overview in the *Channels* window.
- Click *Open in Teams* in the *Microsoft Teams* channel .

Channel	Health status	Details	Actions
 Microsoft Teams	Healthy	Microsoft Teams Channel	Open in Teams
 Web Chat	Healthy	Embeddable Web Chat control	

A discussion will open in the Teams app or Online Teams.

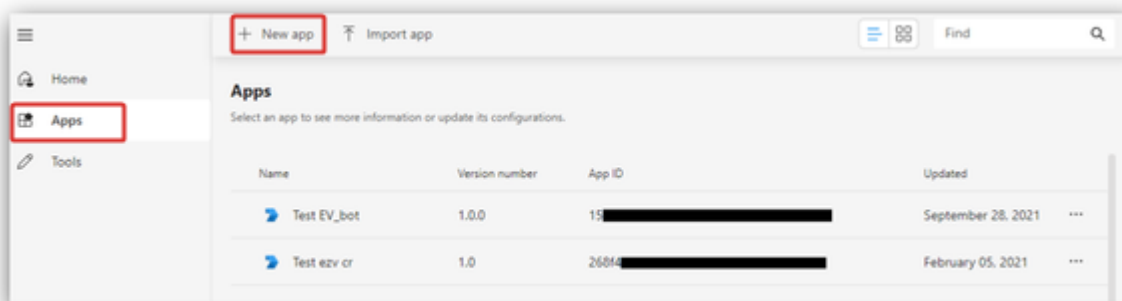
3. Check that your virtual agent is able to interact correctly by initiating a team conversation.



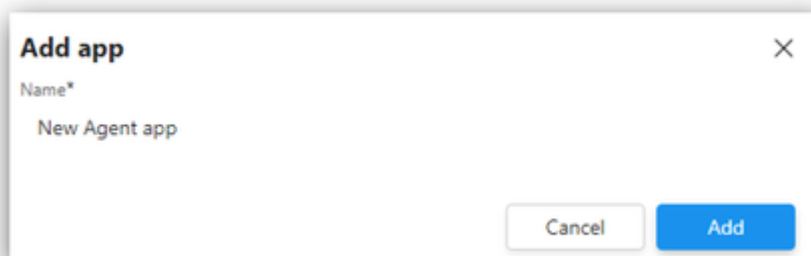
Deploy the *Azure Bot* app in MS Teams

Step 1: Create a new Teams app associated with the *Azure Bot* app

1. Log in to the [Teams Developer Portal](#).
2. Select *Apps* in the menu pane and click + *New app* in the toolbar.



The window for creating the new Teams app will appear.

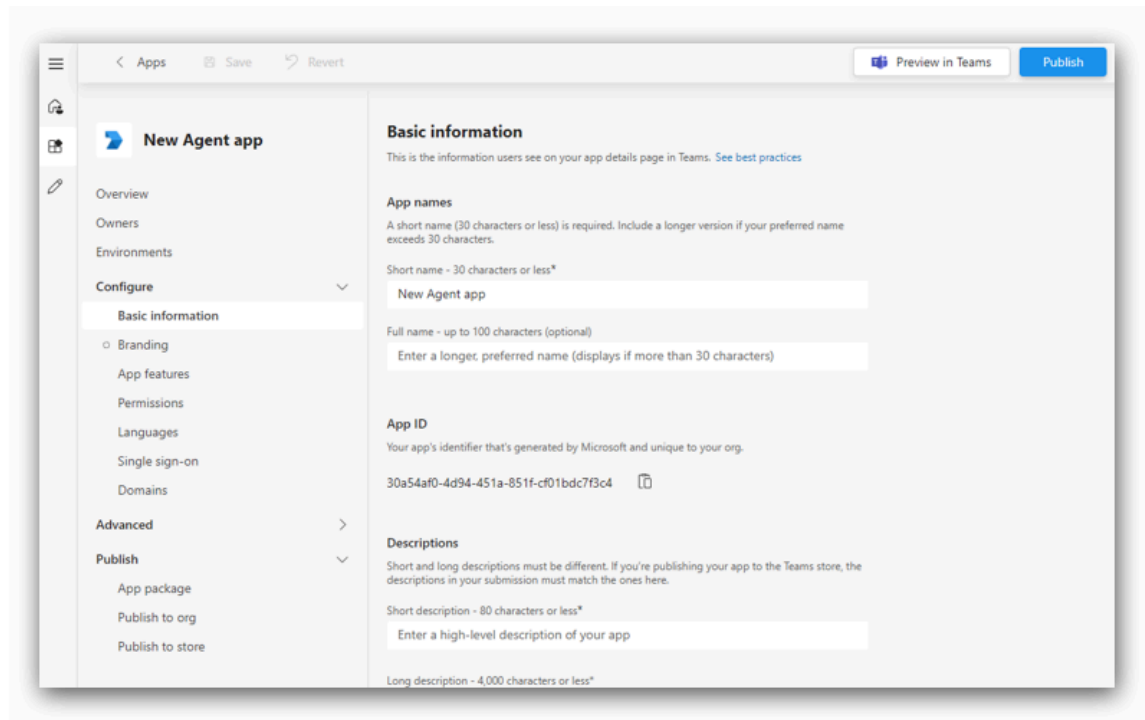


3. Enter the name of the new Teams app.
4. Click Add.

Step 2: Configure the new Teams app

Step 2.a: Specify general information

1. Specify the information on the new Teams app.



App names:

- **Short name:** Name of the Teams app displayed in the MS Teams search. This is similar to the name of an employee.
- **Full name:** Text displayed after the name. This is similar to the job title for an employee.

App ID: Automatically generated unique ID of the Teams app.

Descriptions: Long and short descriptions of the Teams app. This will be displayed in the app catalog.

Version: Version number of the Teams app.

Developer information:

- **Developer or company name:** Name of the Teams app developer.
- **Website:** URL of the website associated with the Teams app. Note: URLs must use the SSL protocol.

App URLs: URLs of pages displaying the privacy statement and terms of use. Note: URLs must use the SSL protocol.

Application (client) ID: Copy and paste the *Azure Bot* app ID (**Microsoft App ID**) you stored in your text editor when creating the app in [step 4.a](#).

Microsoft Partner Network ID (optional): Specify the ID of the partner in the Microsoft Partner Network (MPN).

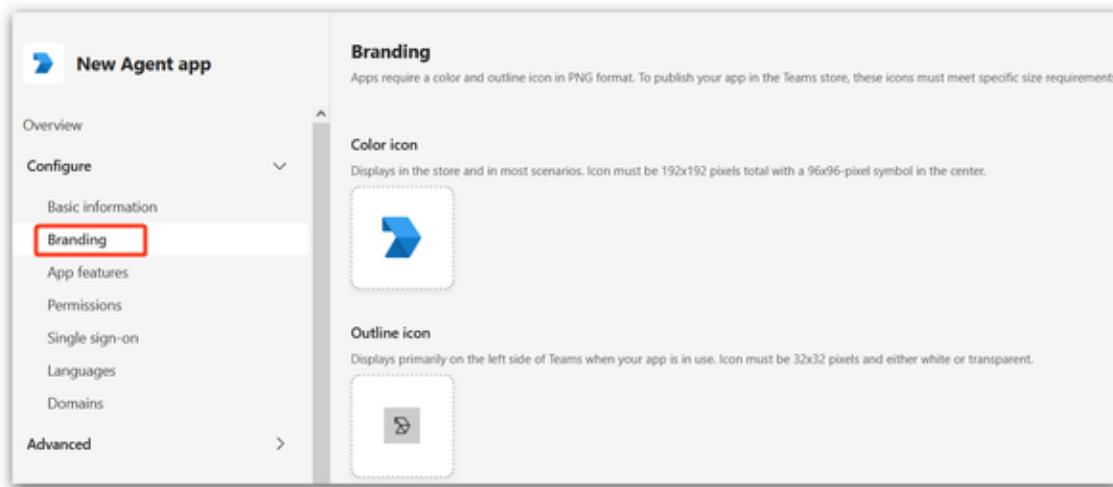


Enter ID 5377006 to identify your new Teams app as an EasyVista app in Microsoft. This will enable you to enjoy Microsoft monitoring and support.

2. Click Save.

Step 2.b: Configure the visual identity of the virtual agent

1. Select *Configure > Branding* in the menu pane.



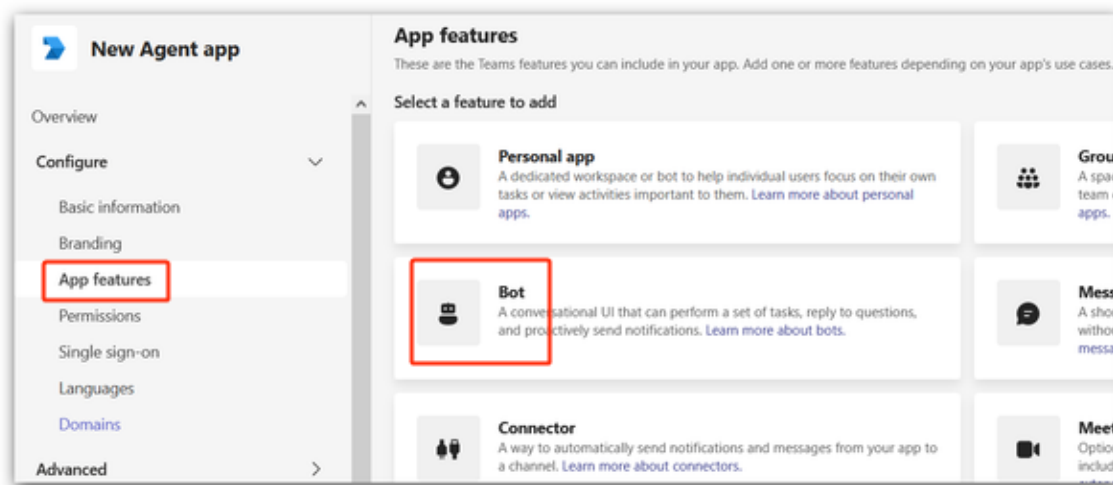
2. Define the virtual agent icon, shape and background color.

3. Click Update to download the files.

Note: Files must be in PNG format.

Step 2.c: Configure the bot functionality

1. Select *Configure > App features* in the menu pane. Click *Bot* in the right pane.



The configuration window will appear.

< Bot

Bots are conversational apps that perform a specific set of tasks. They communicate with users, respond to their questions, and proactively notify them about changes and other events. [Learn more about designing Teams bots.](#)

Identify your bot

Select an existing bot

Select an existing bot

[Create a new bot](#)

Enter a bot ID

cb4cfffdf-ba06-44b5-8fcc-8183de57629b

What can your bot do?

Upload and download files

Only send notifications (one-way conversations)

Support audio calls

Support video calls

Select the scopes in which people can use this command

Personal

Team

Group Chat

Save Revert

2. Specify the information on the bot in Teams.

Identify your bot: Select the *Enter a bot ID* option. Copy and paste the bot ID (bot handle) you stored in your text editor when creating the app in [step 2](#).

What can your bot do?: Select the actions your bot can perform.

Select the scopes: Select the relevant options for the bot's scope.

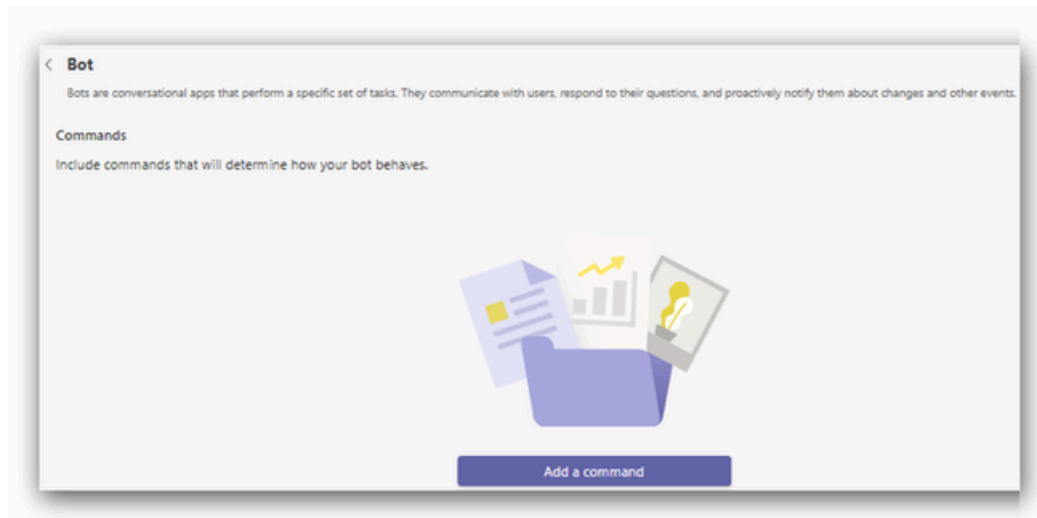
- *Personal:* This enables users to have a direct conversation with the virtual agent.
- *Team:* In team channels where the Teams app is installed, this enables users to mention and communicate with the virtual agent using the *@shortname* instruction.
- *Group Chat:* In a conversation with several participants, this enables users to mention and communicate with the virtual agent using the *@shortname* instruction.

3. Click Save.

4. (optional) Enter the predictive text that will be suggested to users.

Note: The predictive text will be suggested to users in the conversation panel and will trigger actions when clicked.

- Click Add a command.

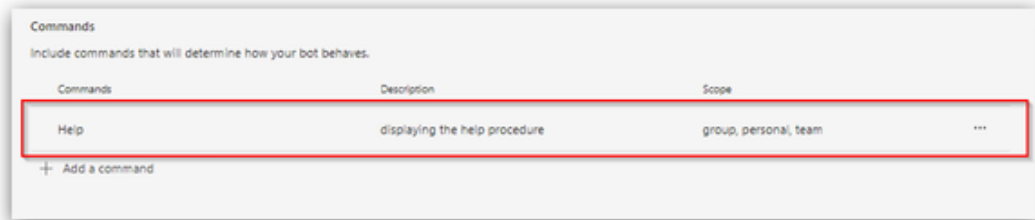


The window for configuring the command will appear.

- Specify the information on the new command.
 - **Command:** Enter the predictive text, i.e. text displayed in the conversation panel.
example Help
 - **Description:** Description of the action triggered by the command.
example Display help procedure
 - **Select the scopes:** Select the relevant options for the bot's scope.
 - *Personal:* This enables users to have a direct conversation with the virtual agent.
 - *Team:* In team channels where the Teams app is installed, this enables users to mention and communicate with the virtual agent using the @shortname instruction.
 - *Group Chat:* In a conversation with several participants, this enables users to mention and communicate with the virtual agent using the @shortname instruction.

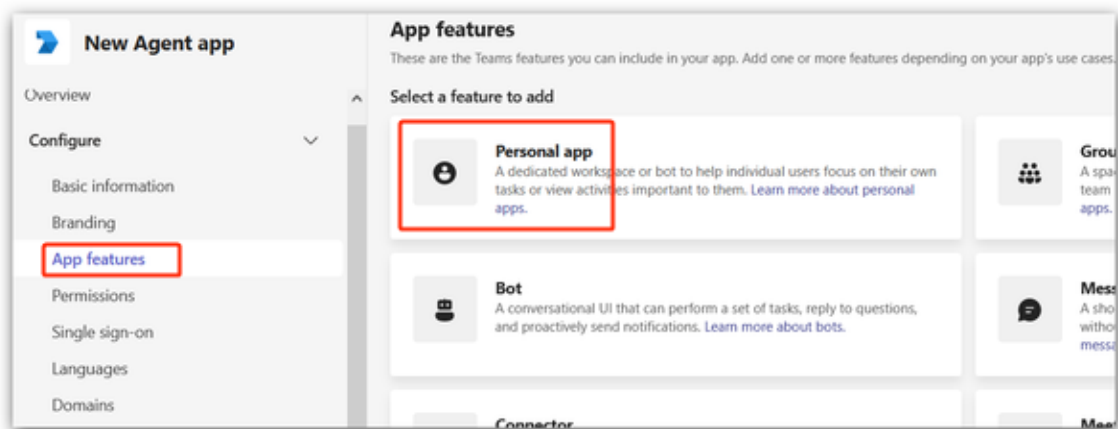
- Click Save.

The new command will be added to the list.

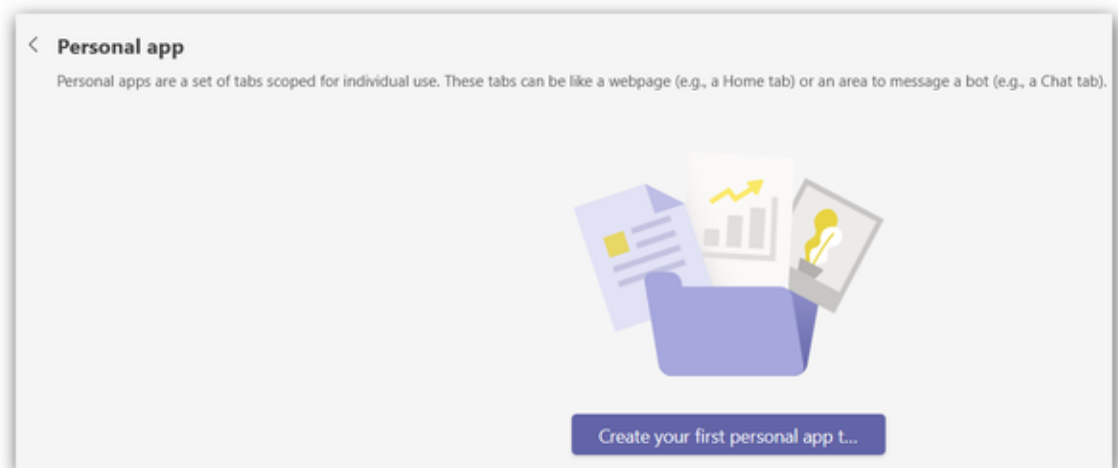


Step 2.d (optional): Integrate the portal in a Teams conversation tab

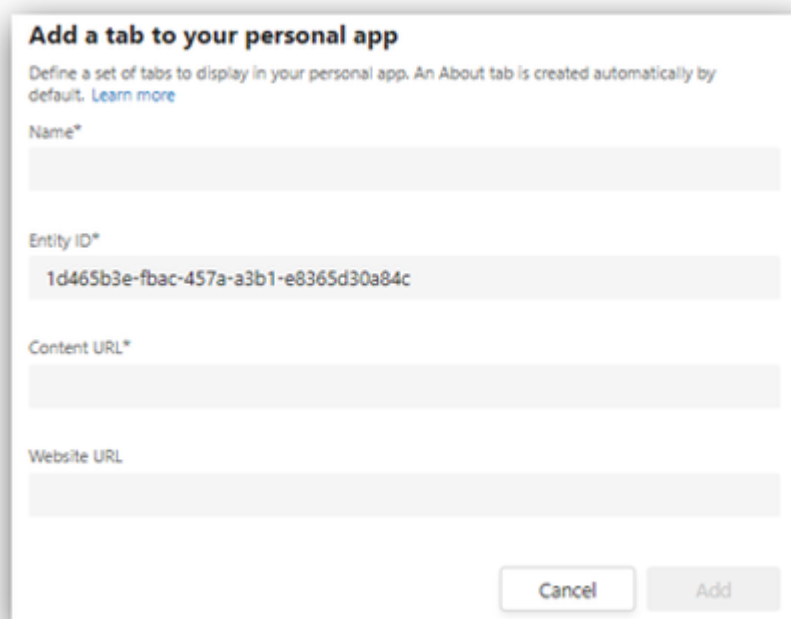
1. Select *Configure > App features* in the menu pane. Click *Personal App* in the right pane.



2. Click Create your first personal app tab.



The window for configuring the tab will appear.



Add a tab to your personal app

Define a set of tabs to display in your personal app. An About tab is created automatically by default. [Learn more](#)

Name*

Entity ID*

Content URL*

Website URL

Cancel Add

3. Specify the information on the new tab.

Name: Name of the tab in the Teams conversation.

Entity ID: Automatically generated unique ID of the tab.

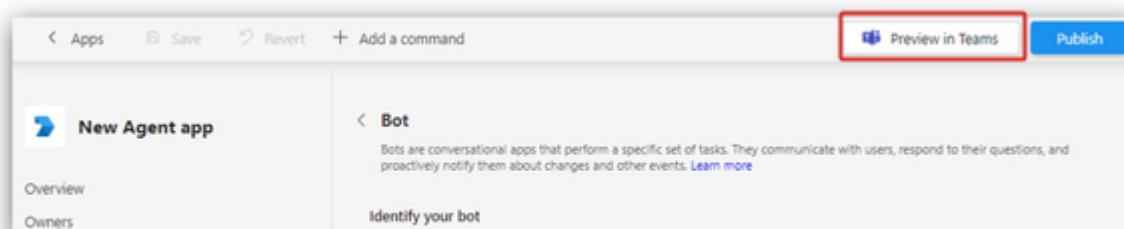
Content URL: URL of your portal.

Website URL (optional): URL of your website.

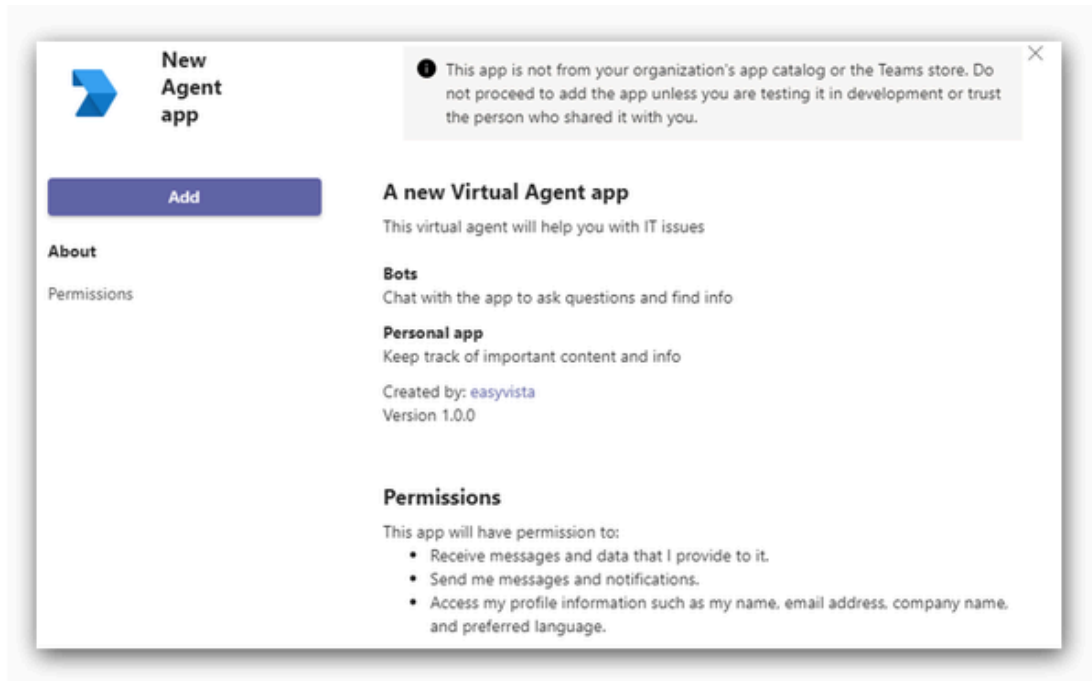
4. Click Add.

Step 3: Install the Teams app and test the bot

1. Click  *Preview in Teams* in the toolbar.

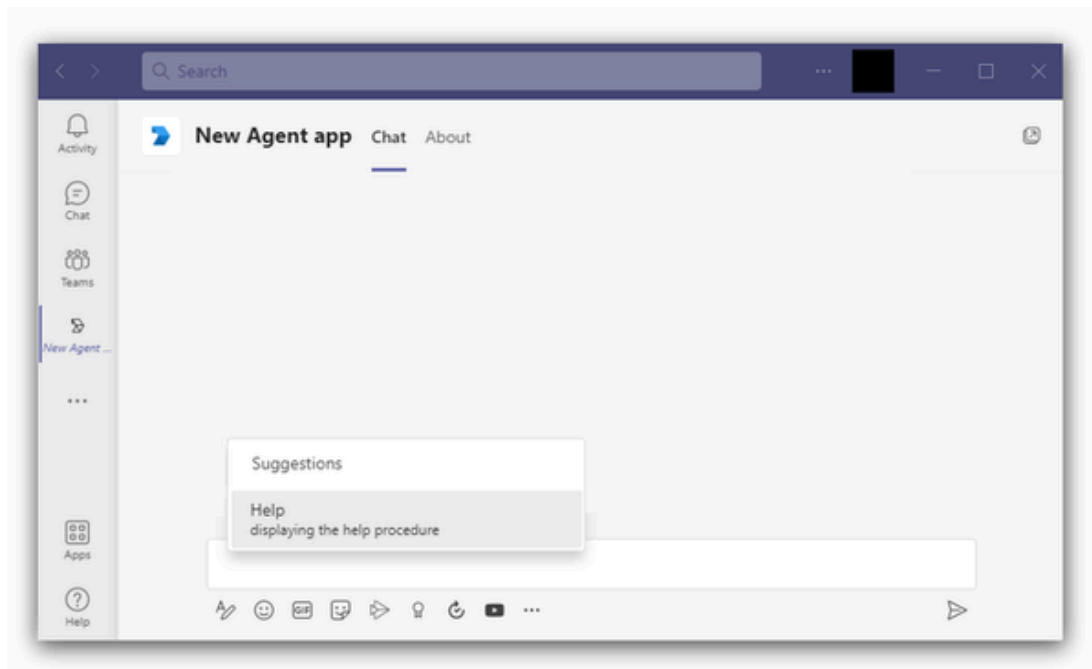


- The Teams app or Online Teams will run.
- The window for installing the app will appear.



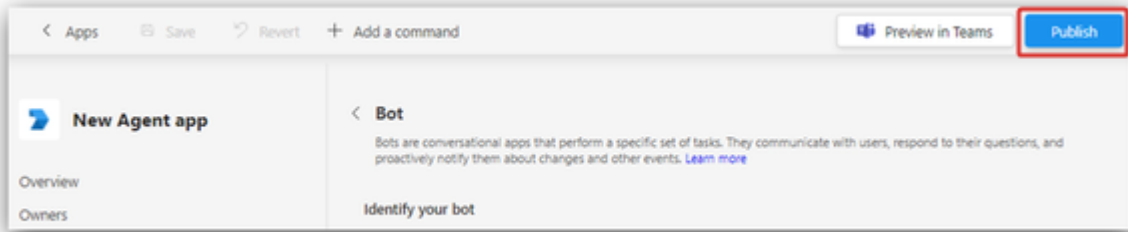
2. Click Add.

- The chat window of the virtual agent will appear.
- The predictive text command will be displayed.

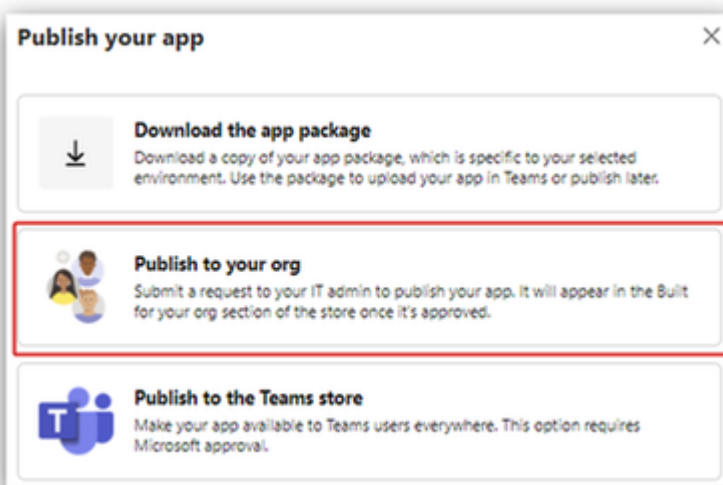


Step 4: Add the new Teams app to the list of Teams apps for the company.

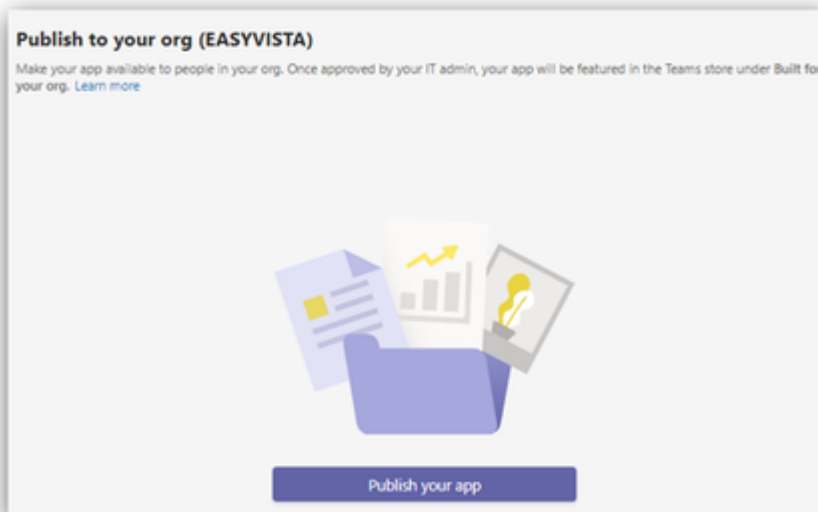
1. Click Publish in the toolbar.



2. Select *Publish to your org*.



The publication window will appear.



3. Click Publish your app.

- The publication process will run.
- The request status will be displayed.

Publish to your org (EASYVISTA)	
Make your app available to people in your org. Once approved by your IT admin, your app will be featured in the Teams store under Built for your org. Learn more	
Version	Status
1.0.0	Submitted

4. Ask the Teams administrator to validate the Teams app and make it available to all company employees.

📄 See [Microsoft documentation](#) > Validate

Microsoft Teams admin center

Manage apps

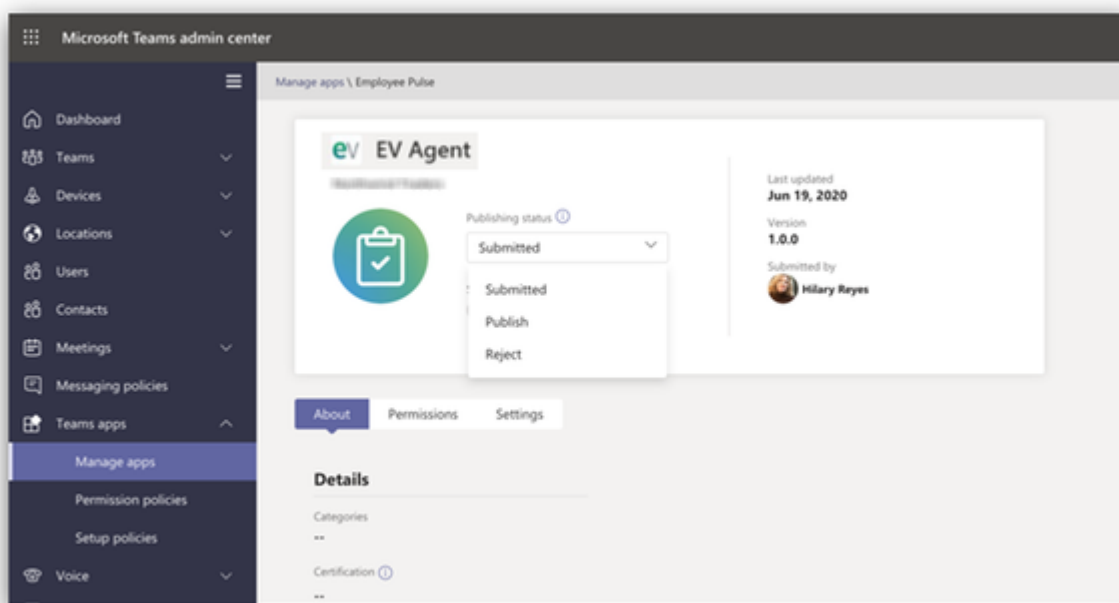
When you are managing apps for your organization, you are controlling what apps are available to users in your organization's app store. You can then use app permission and app setup policies to configure what apps will be available for specific users. [Learn more](#)

Pending approval

2 Submitted custom apps 1 Updated custom apps

+ Upload Allow Block Add to team 679 items Search by name

Name	Certification	Publisher	Publishing status	Status	Custom app	Permission
Edubase Reader	--	--	--	Allowed	No	--
Egnyte	--	--	--	Allowed	No	--
etmah.io	--	--	--	Allowed	No	--
EV Agent	--	--	Submitted	Blocked	Yes	View de



LIST OF FILES TO DOWNLOAD

- [Integration PDF file](#)