

TD SYNEX Digital Bridge Microsoft Teams Plugin

Installation Steps

Version 1.0.1

Last Updated 1.24.25

TDS Digital Bridge - MS Teams - Install Requirements - v1.2.pdf

Access the information you need, when you need it, within the tool you use every day. The TD SYNEX Microsoft Teams Plugin brings critical data and updates to your fingertips, eliminating the need to switch to TD SYNEX EC Express. Stay connected with your TD SYNEX team and make informed decisions faster, all without leaving your Teams environment.

App features

Tabs: Add as a tab at the top of a group chat, channel, or meeting

Personal app: Keep track of important content and info

Permissions

This app will have permission to:

- Receive messages and data that I provide to it.
- Access my profile information such as my name, email address, company name and preferred language.
- Receive messages and data that team or chat members provide to it in a channel or chat.
- Access information from this team or chat such as team or chat name, channel list and roster (including team or chat member's names and email addresses) - and use this to contact them.

User Installation Steps

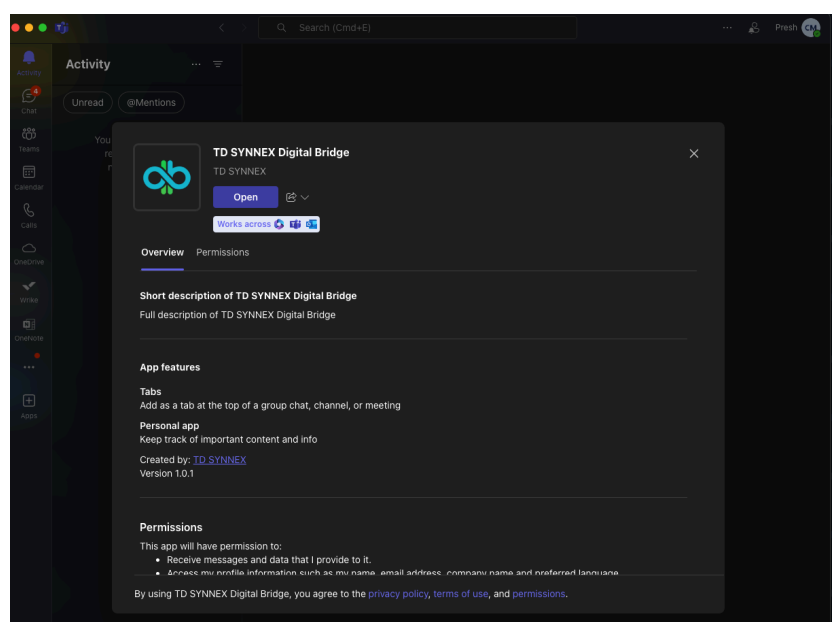
1. Accessing the App Install Page

Locate the Plugin: Open Microsoft Teams and navigate to the App Store. Search for “TD SYNEX Digital Bridge.”

Click Open: On the app install page, click the “Open” button to initiate the setup process.

Alternatively, you can use this URL to go directly to the page:

<https://appssource.microsoft.com/en-us/product/office/WA200008050>

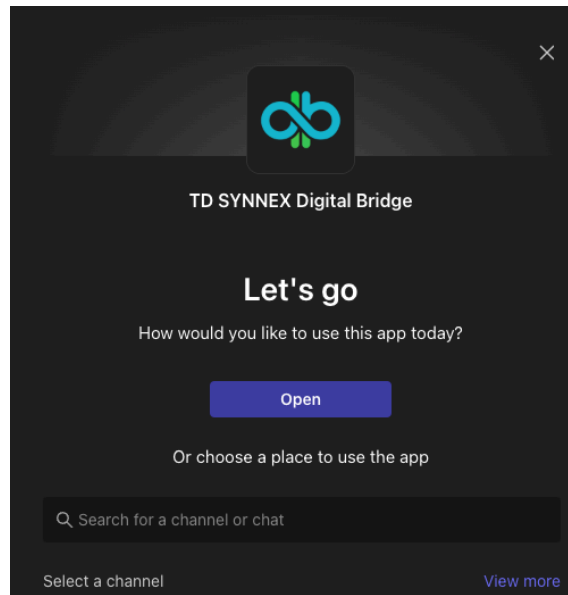


2. Setting Up the Connector

Once the app opens, follow any on-screen prompts to set up the connector. This process typically involves:

Selecting your organization.

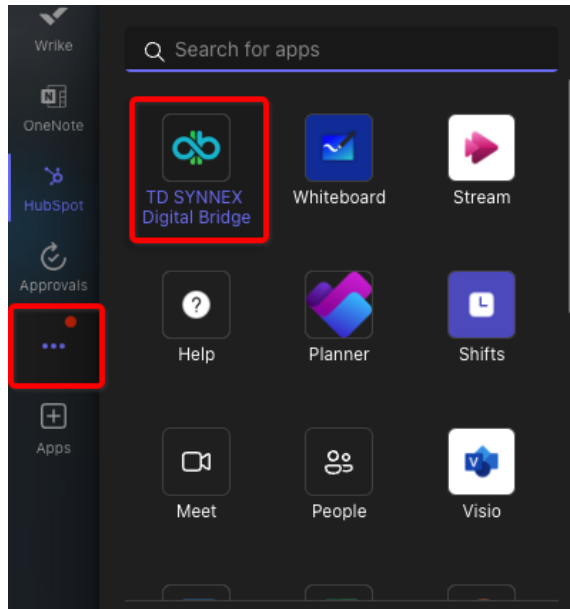
Granting permissions for the plugin to connect to your Microsoft Teams account.



3. Pinning the Plugin for Quick Access

Access the Plugin:

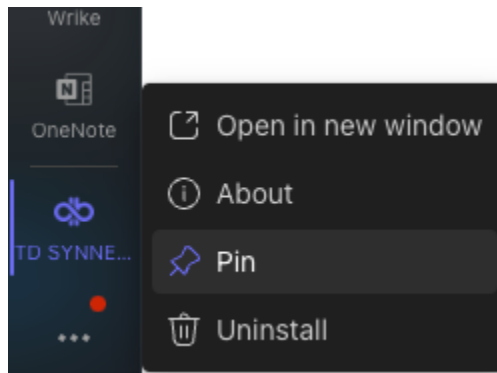
After setup, locate the plugin in your Microsoft Teams interface by clicking on the three dots (...) in the left-hand navigation bar.



3. Pinning the Plugin for Quick Access (cont.)

Pin the Plugin:

Right-click on the plugin name and select "Pin" from the context menu. This action will add the plugin to your sidebar for easy access.

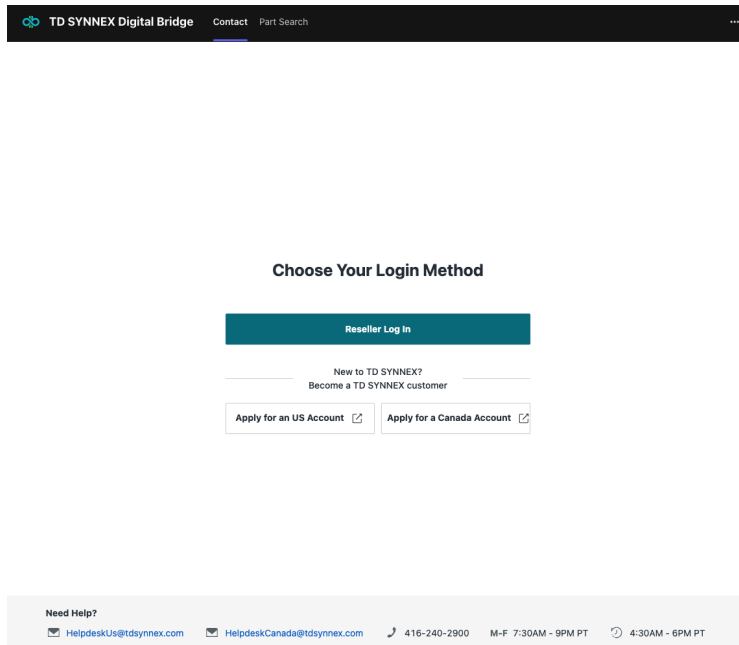


4. Authenticating with TD SYNEX

Access the Plugin:

Click the pinned plugin in the sidebar.

Click 'Reseller Log In' on the initial page.



4. Authenticating with TD SYNEX (cont.)

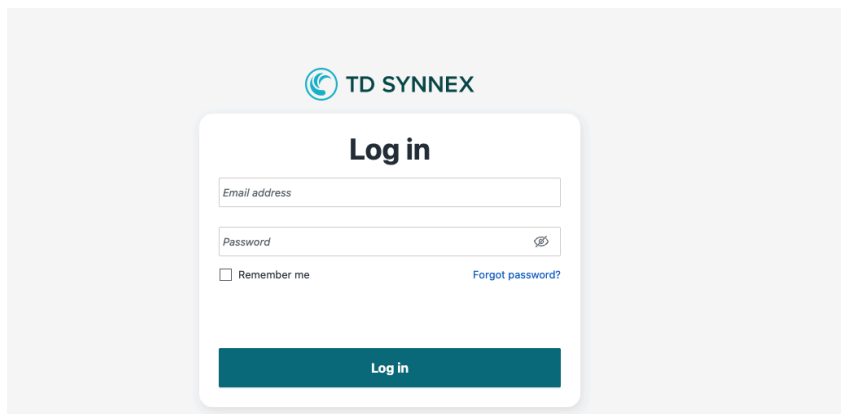
Sign-In Page:

You will be directed to the EC Express sign-in page.

Enter your login credentials associated with your TD SYNEX account.

Verify Login:

Once successfully logged in, you can begin using the app.



Microsoft Teams Admin Instructions

Steps for how you can allow the TD SYNEX Digital Bridge app for your organization in Microsoft Teams.

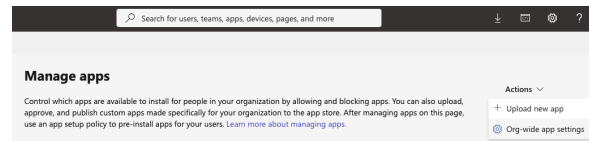
Option 1: Allow Third-Party Apps in Org-Wide App Settings

Navigate to Manage Apps in the Microsoft Teams Admin panel.

<https://admin.teams.microsoft.com/policies/manage-apps>

Access Org-Wide Settings:

- At the top of the Manage apps page, click Org-wide app settings.

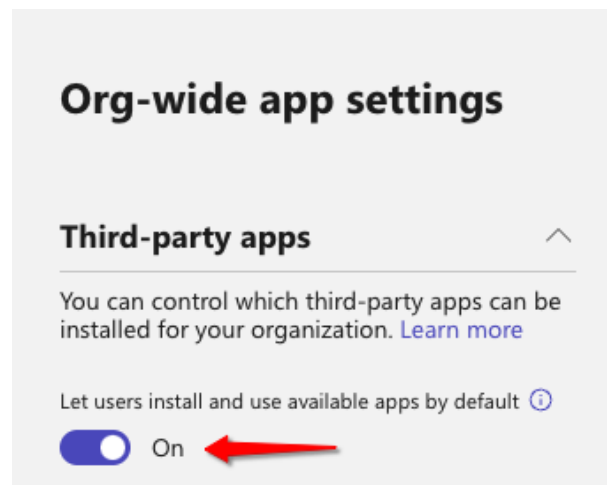


Enable Third-Party Apps:

- Toggle Allow third-party apps to On.
- (Optional) Enable Allow any new third-party apps published to the store by default to allow future third-party apps automatically.

Save Changes:

- Click Save to apply the settings.

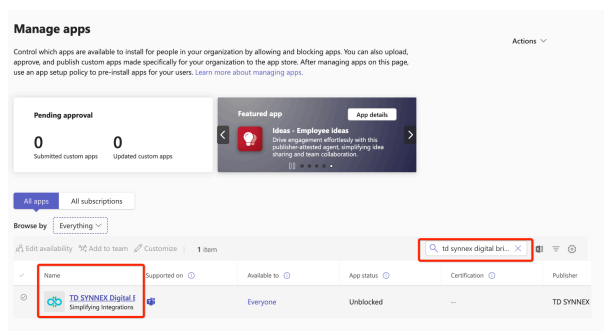


Option 2: Allow Just the TD SYNEX Digital Bridge App

This option allows only this specific app while keeping restrictions for other third-party apps.

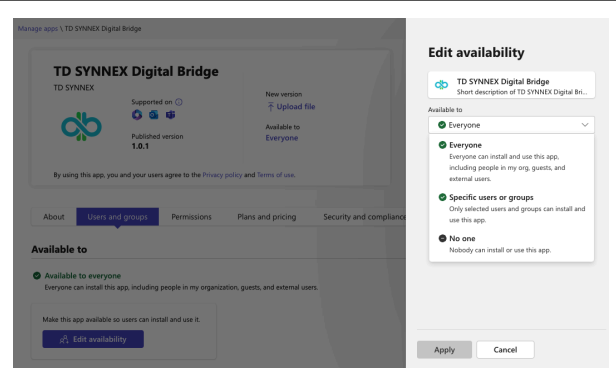
Search for the App:

- In the Manage apps page, use the search bar to locate TD SYNEX Digital Bridge.



Allow the App:

- Click on the app name in the search results to view its details.
- Select 'Users and groups'
- Select 'Edit availability'
- Select 'Everyone' or the users / groups who will have access granted



Eligibility to Add the Plugin

To install and use the TD SYNEX Digital Bridge plugin in Microsoft Teams, users must meet specific permissions and access requirements. This guide outlines the criteria for adding the plugin, including necessary permissions, organizational settings, and profile information.

User Permissions:

- Users must have the necessary permissions to install apps within Microsoft Teams.
- If organizational policies restrict app installations, only users with admin permissions or those in roles with the ability to install apps can add the plugin.

Team and Chat Settings:

- The app can be added to group chats, channels, or meetings as a **tab** at the top, so users need to have access to these functionalities in their Teams environment.
- The organization's Microsoft Teams admin center must allow third-party apps or this specific plugin to be installed.

Personal Access:

- Any individual user with standard permissions in Teams can add the plugin as a **personal app** to keep track of content and information, provided their admin hasn't restricted this feature.

Profile Information Requirements:

- Users must be willing to grant access to their profile information, including:
 - Name, email address, company name, and preferred language.
- This implies that users within the organization must use Teams with fully configured profiles to allow integration.