Microsoft

check.it for Microsoft Teams

Deployment guide

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1. Introduction

This document provides guidance for Microsoft 365 administrators to deploy check.it in Microsoft Teams. This document also includes information for Teams users to get started with check.it.

1.1 Overview of check.it in Teams

- check.it allows organizations to create templated checklists that can be shared amongst internal and external teams, chats, and groups. The templates can be used to track progress during repetitive processes such as employee onboarding or training
- Using check.it is a simpler alternative to traditional tracking methods such as spreadsheets. It increases productivity and reduces time wasting
- Once a check list has been shared with a chat, members can easily make edits. Once a task has been completed, the employee simply checks it, and it will show the rest of the chat that it is complete and who has carried it out

# 2. Deployment guidance for Microsoft 365 administrators

2.1 Prerequisites

Prior to deploying check.it in Microsoft Teams, ensure that you have:
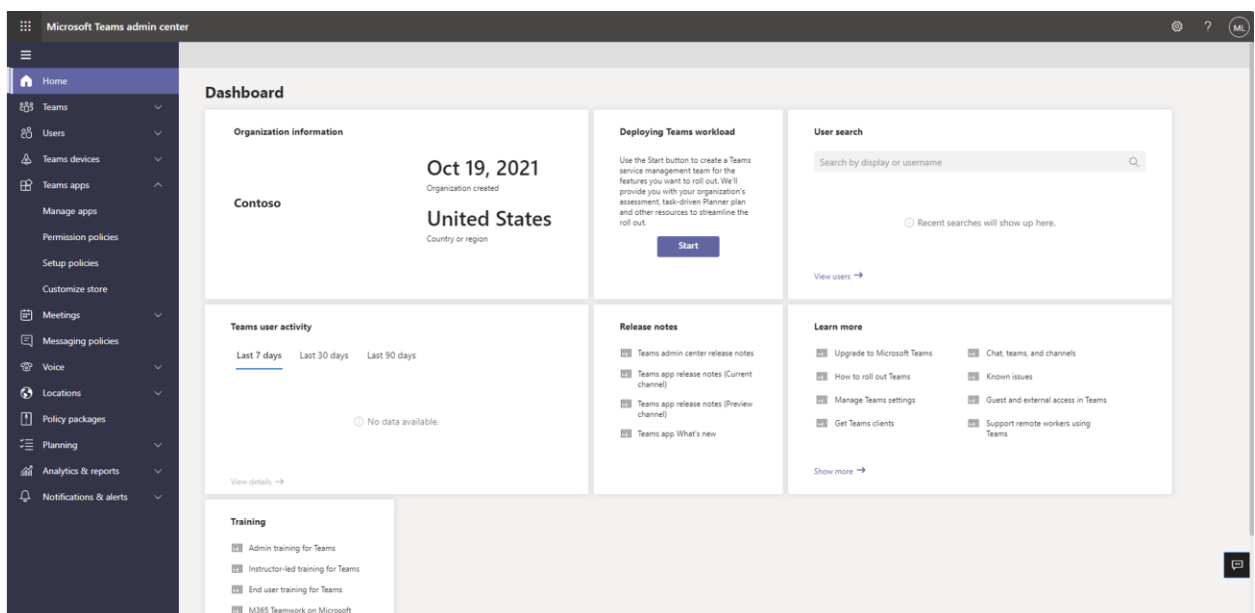
- An active Microsoft 365 subscription
- Access to a Microsoft 365 administrator account
- Activated Microsoft Teams for your organization
- An active Cloud Cover IT/check.it subscription

2.2 Sign into the Microsoft Teams admin center

1. Go to https://admin.teams.microsoft.com/

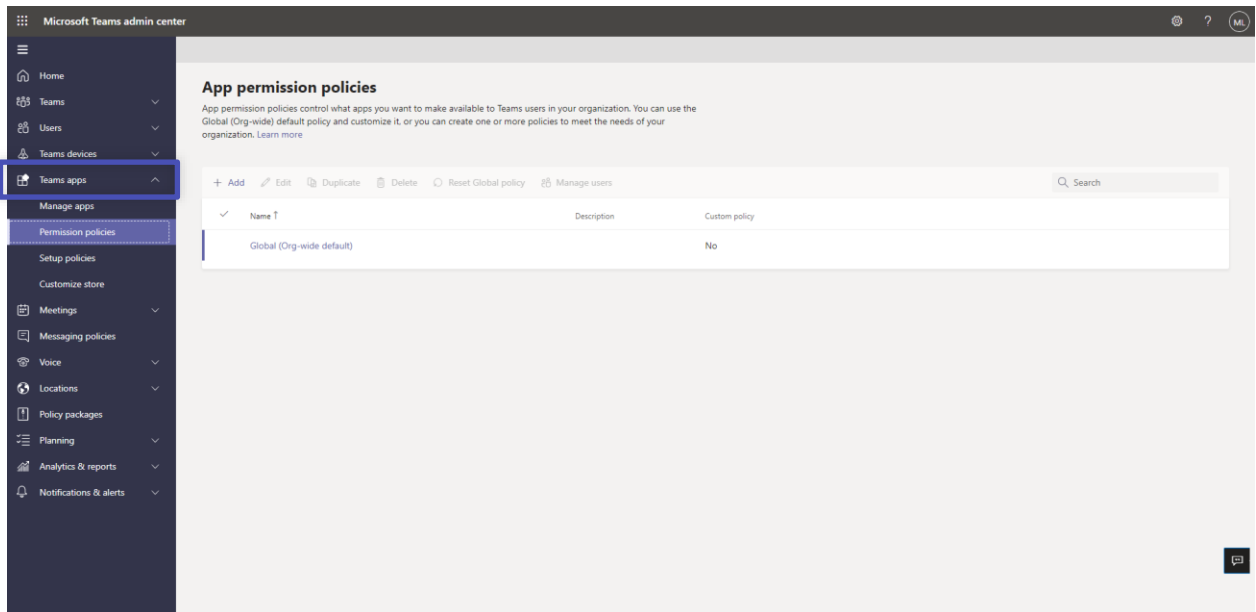2. Enter your administrator credentials
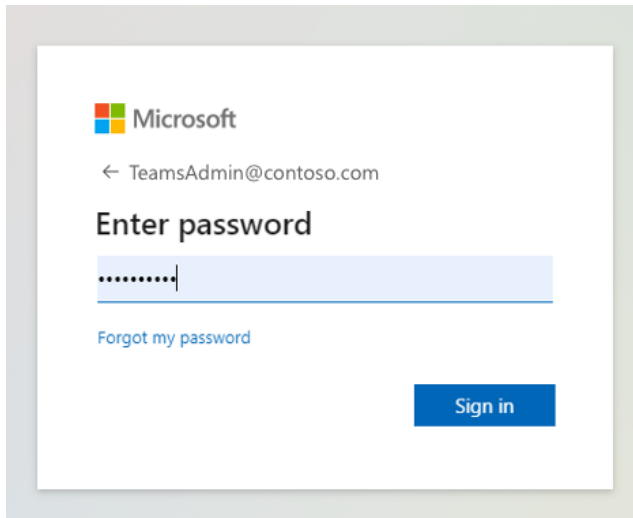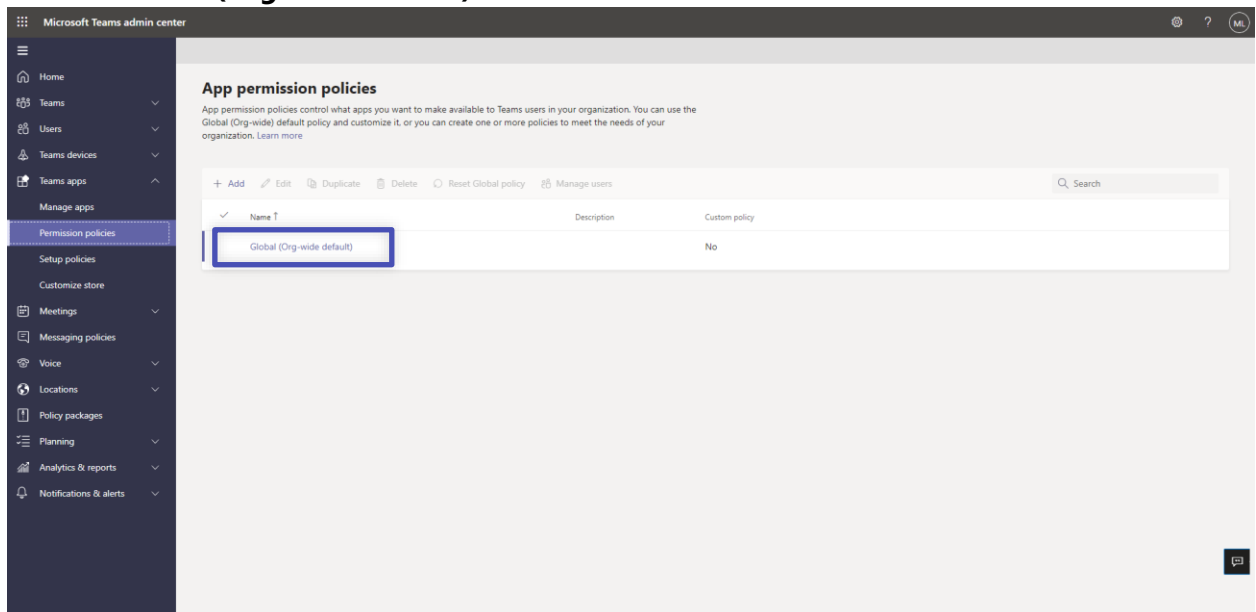
3. Access the Teams admin center dashboard.

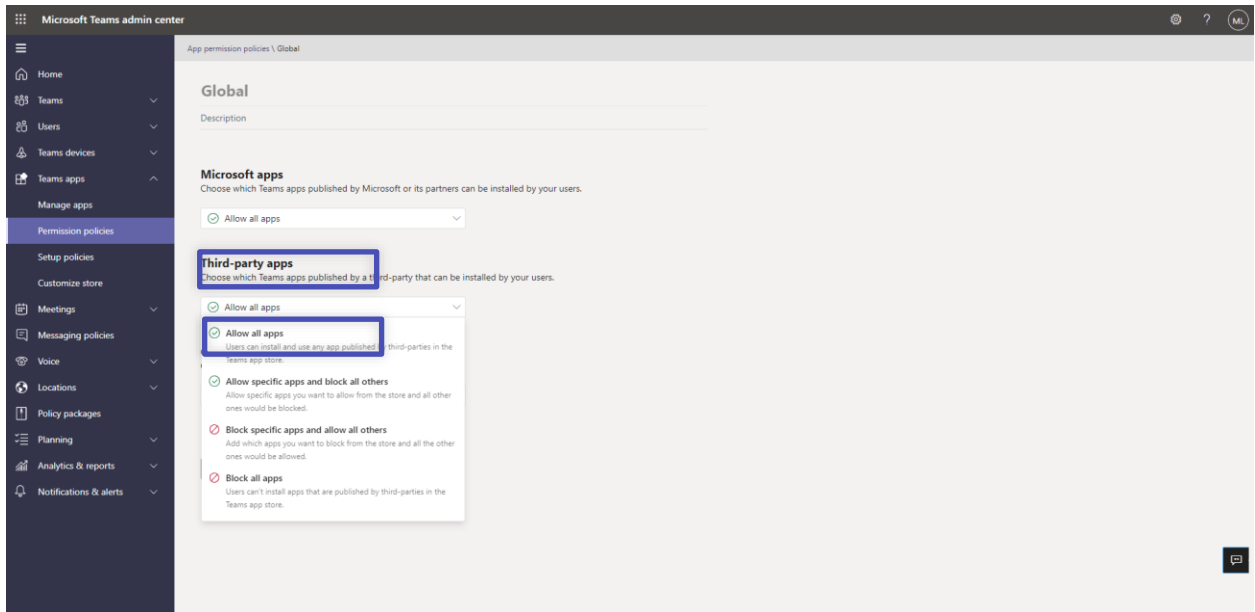## 2.3 Set Global (org-wide) app permission policies

4. Select the **Teams apps** dropdown followed by **Permission policies.**
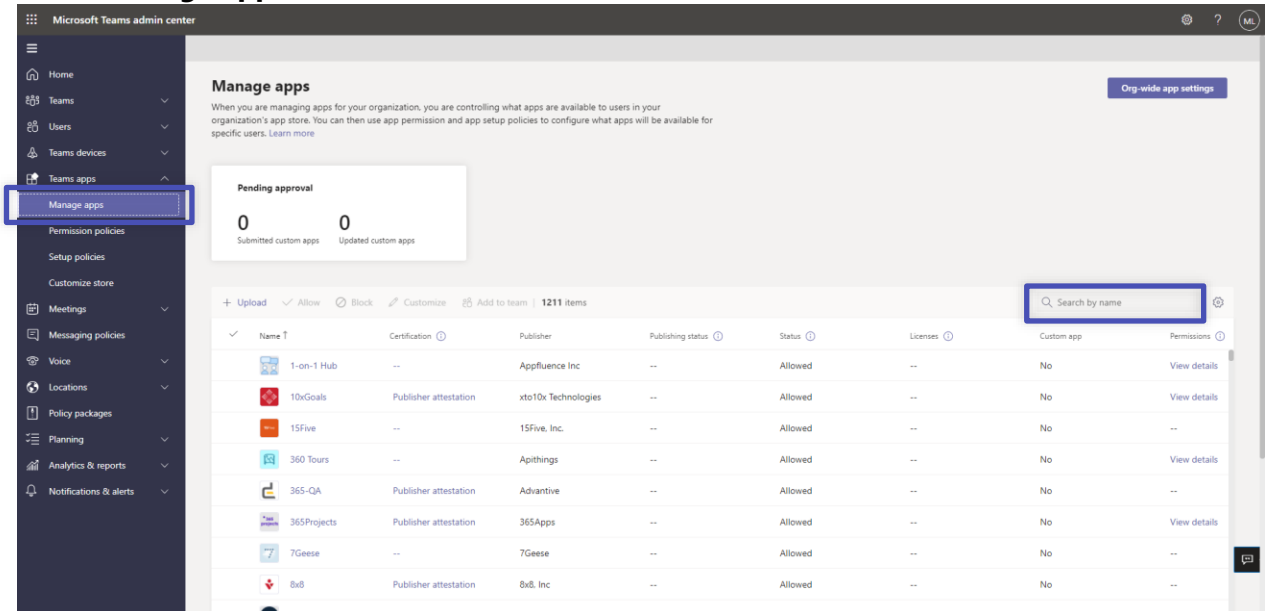
5. Click on **Global (Org-wide default)**

6. Under **Third-party apps**, ensure that **Allow all apps** is selected. Or, choose **Allow specific apps and block others** and search for check.it to add it to the list of approved apps.
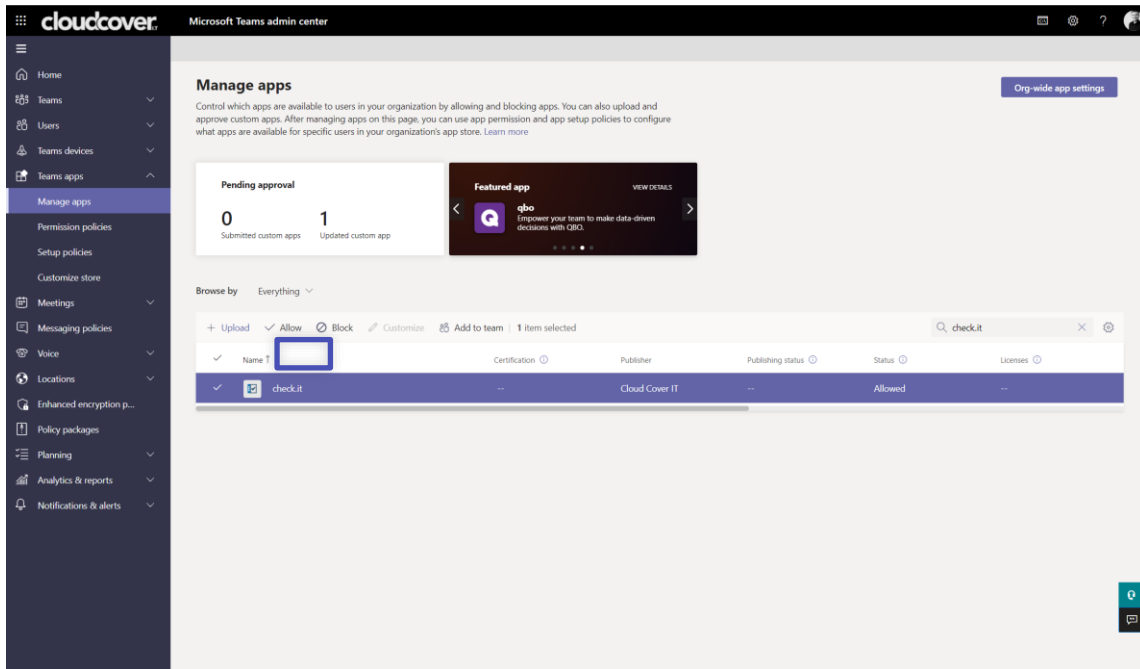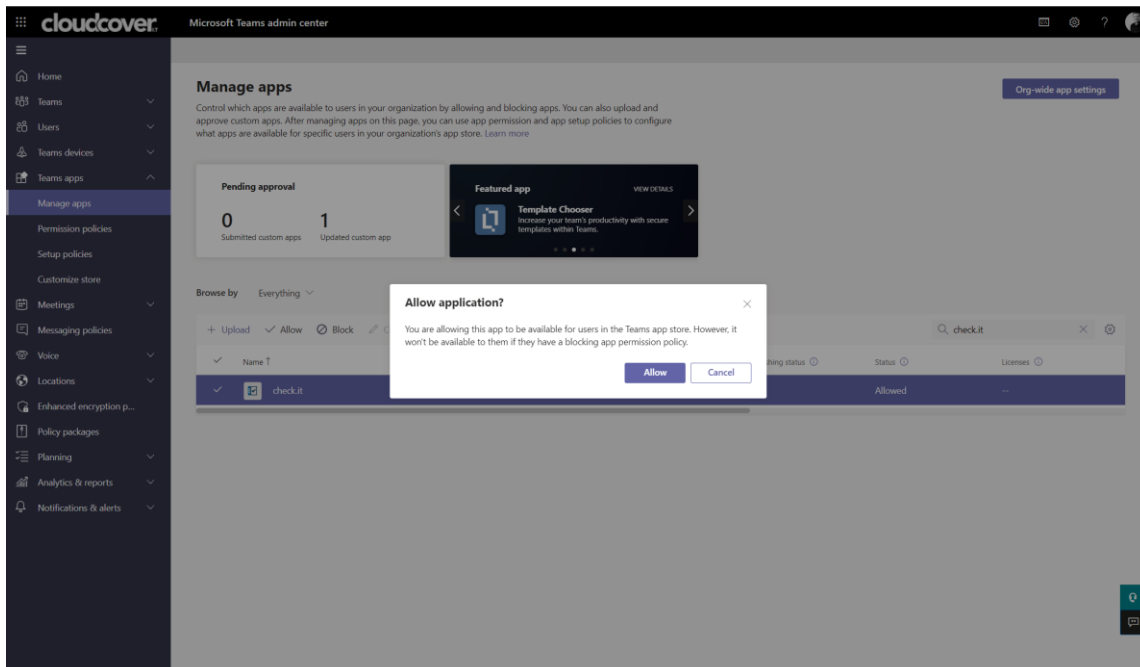
2.4 Activate check.it in Teams

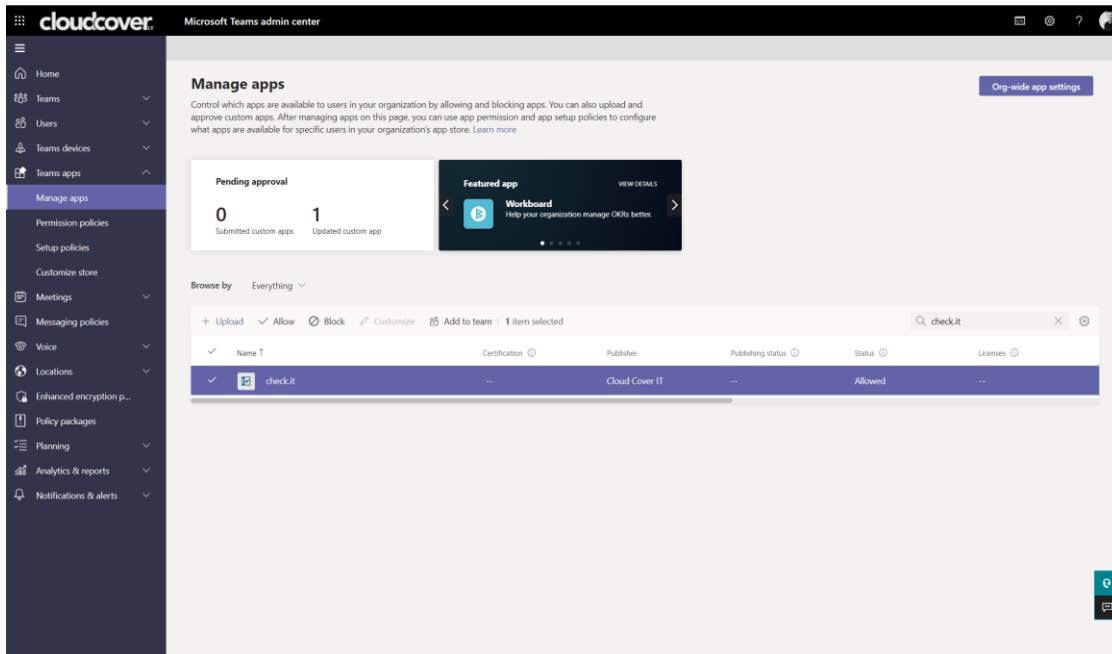7. Select **Manage apps** and search for check.it

8. Click on the check mark next to check.it and select **Allow**.

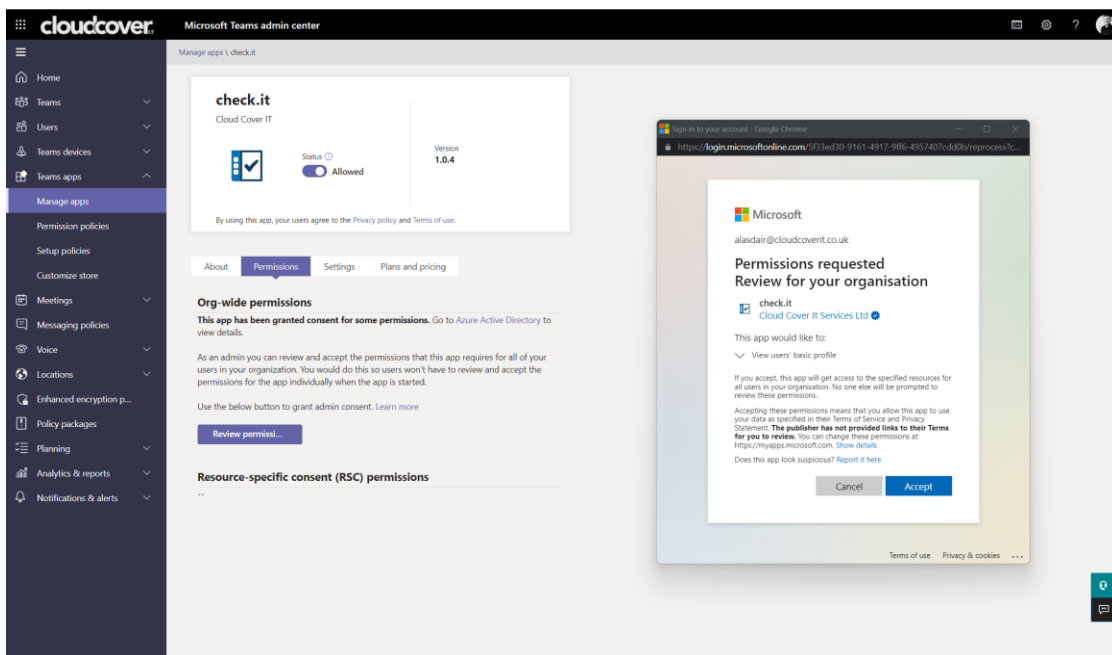Copyright ©2021 Microsoft Corporation.

9. Click **Allow** to let users access the application in Teams.

10. Click on the application to review the permission policies.

11. Click on **Permissions**, then **Review permissions** to launch a new window with the requested permissions. Click **Accept**.

12. If necessary, review the **Settings** for the application.

2.5 Troubleshooting and additional resources

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1. If you experience any issues, please reach out to us via sales@cloudcoverit.co.uk
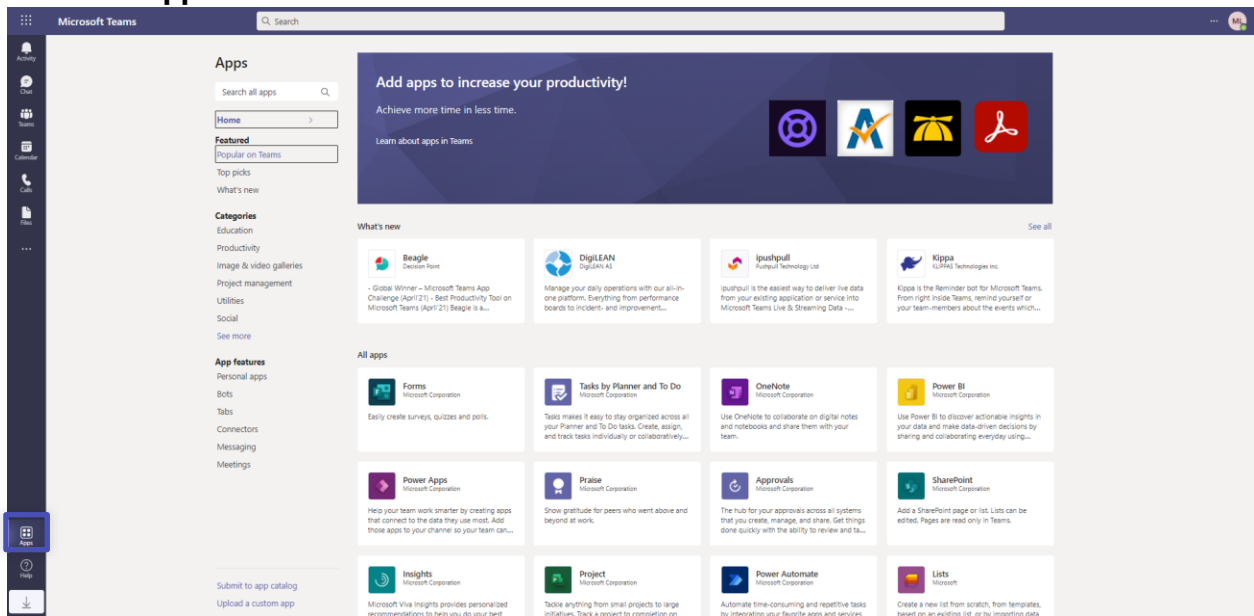
3. Deployment guidance for Teams users
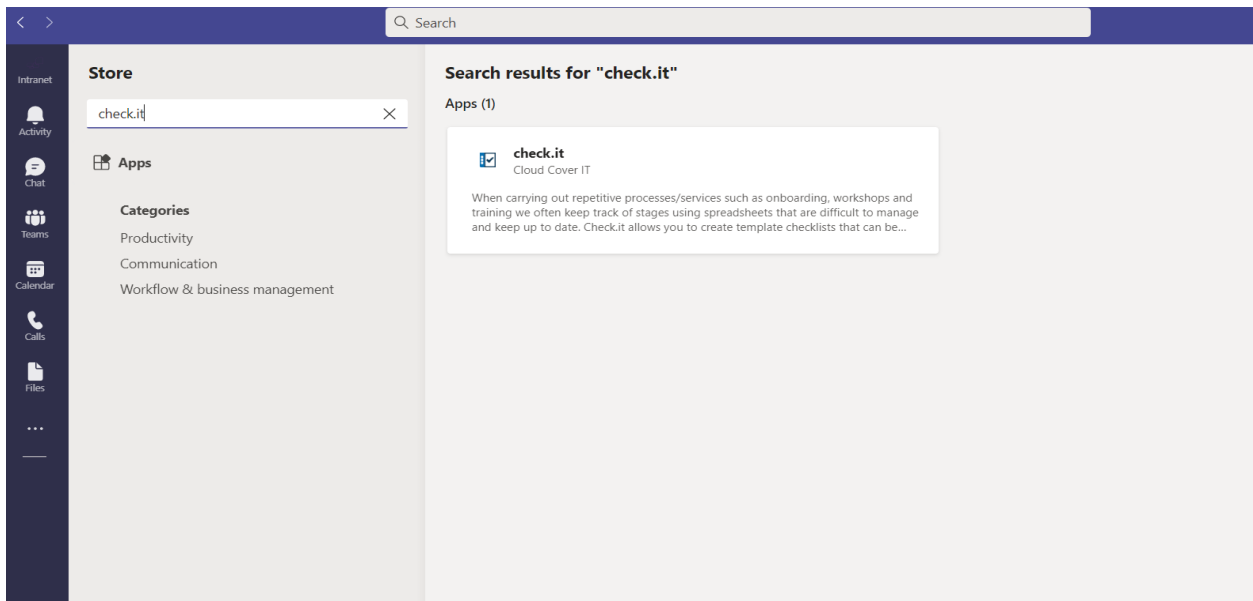
3.1 Prerequisites

- Active Teams account
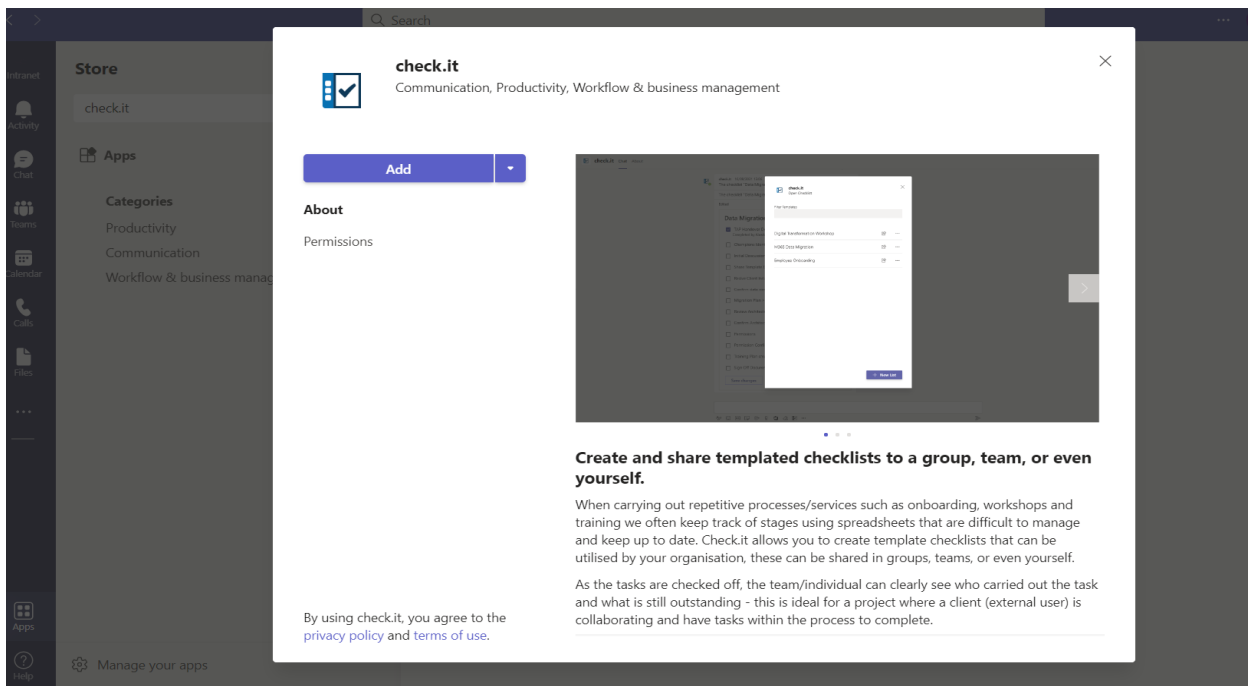
3.2 Add check.it to Teams

1. Open Teams and sign in.

2. Select the **Apps** icon on the left rail of the Teams window.

3. Search for check.it

4. Click on the application and press the **Add** button.

3.3 Start using check.it

5. Create companywide templates for repetitive business processes
6. Share the checklist within the relevant team, channel, or group

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7. Once someone has completed a task, instruct them to check it off the list. Everyone else in the chat will be able to see that the task has been completed, and who did it
8. Complete the checklist once all tasks are complete

3.4 Additional resources

9. To learn about the other products and services we offer, visit www.cloudcoverit.co.uk