

Admin Guide.

Installation and Activation



ShortPoint Installation and Activation for Microsoft Teams

ENVIRONMENT

This guide is for ShortPoint for Microsoft Teams users

SHORTPOINT VERSION

This guide is suitable for installing ShortPoint for Teams version 6.x.x.x and higher

Version 1.2

October 20, 2022



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Section 1

Before We Begin

This section discusses the required permissions you will need before you proceed with the installation process. Follow the instructions carefully to get started.

Global Office 365 Admin

You must have **Global Office 365 Admin** access to install the ShortPoint App for Teams. This admin access is required to create and/or use an App Catalog. The App Catalog is where you will upload the ShortPoint SPFx file.

To check if you have permission, use the URL below and replace the **tenantname** with the name of your tenant:

<https://tenantname-admin.sharepoint.com>.

For example, contoso is your tenant's name. The URL will be rewritten as:

<https://contoso-admin.sharepoint.com>.



If you are redirected to the SharePoint admin center, it means that you are the Office 365 Global Admin and you can proceed to the next section. Otherwise, contact your IT department to help you upload ShortPoint for Teams to the App Catalog.

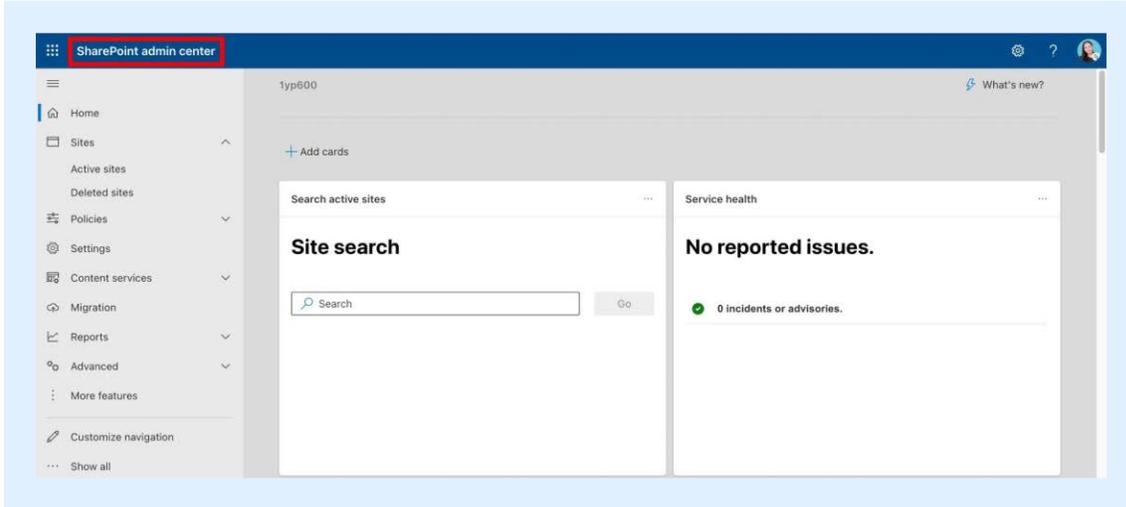


Figure 1.1 SharePoint Admin Center

Section 2

Download ShortPoint for Teams

This section describes how to download the latest version of the ShortPoint App for Teams.

Go to <https://www.shortpoint.com/> and select **Download** at the top right corner.

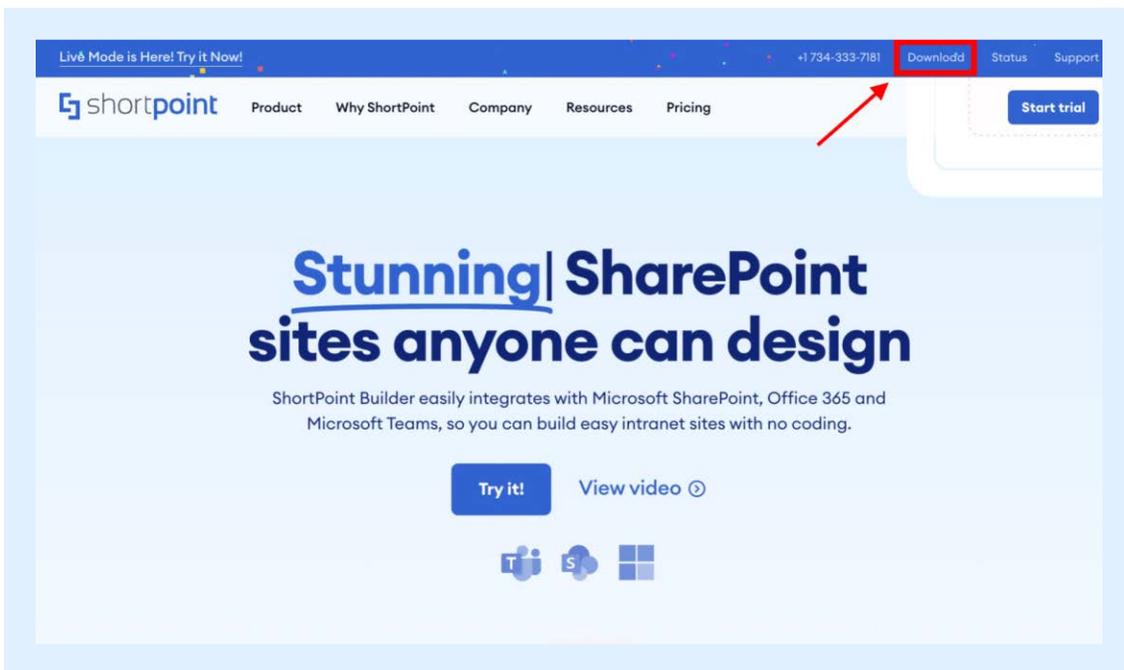


Figure 2.1.1 Download button

Scroll down and choose **Microsoft Teams**.

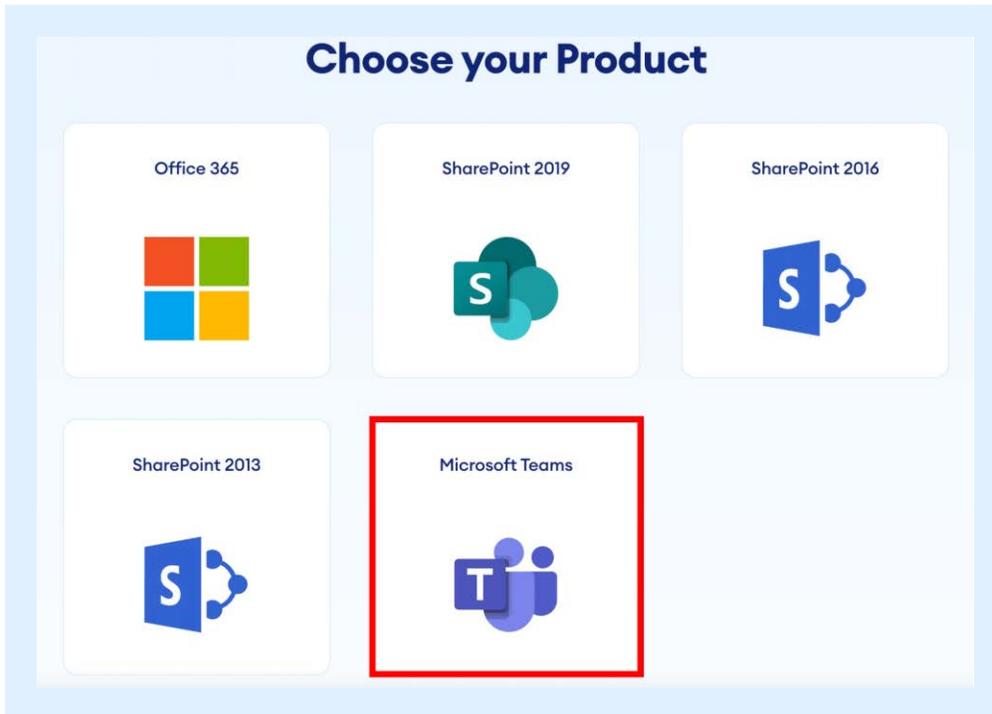


Figure 2.1.2 Microsoft Teams

Click the **Download** button.



Figure 2.1.3 Download button

If you are using the Chrome browser, you will see a ZIP archive at the bottom of your screen after clicking the download button. If you are using another browser, look for the file in your downloads.

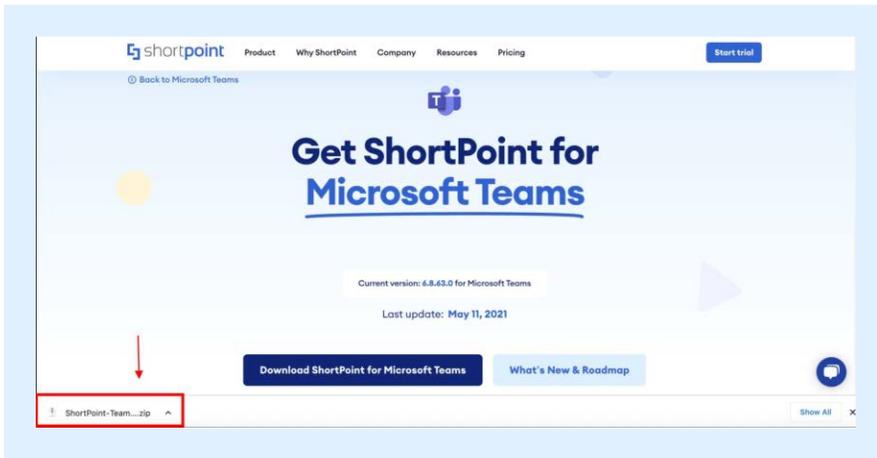


Figure 2.1.4 ShortPoint ZIP archive

Extract the file **ShortPoint-Teams_XXXX.zip**.

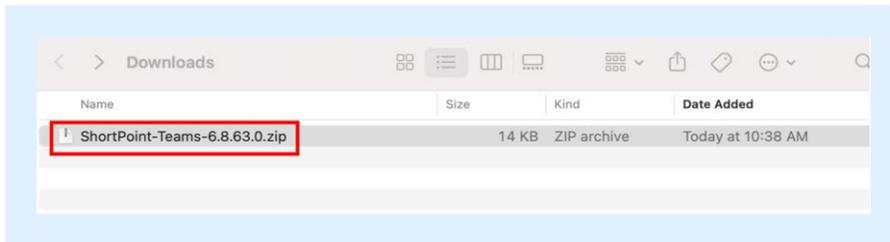


Figure 2.1.5 Extract the ShortPoint ZIP archive

After extracting, make sure you have the following files:

- shortpoint-spx-teams.sppkg
- teams.zip

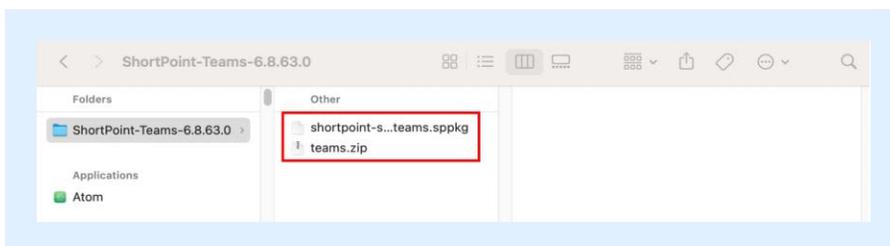


Figure 2.1.6 ShortPoint files

Section 3

Upload the ShortPoint App to the Tenant App Catalog

This section describes how to upload the ShortPoint App for Teams to the Tenant App Catalog in Office 365. Check out the steps below to learn how.

3.1 Uploading to Tenant App Catalog

Sign in to office.com with your Global admin account and from your side panel, select **Admin**.

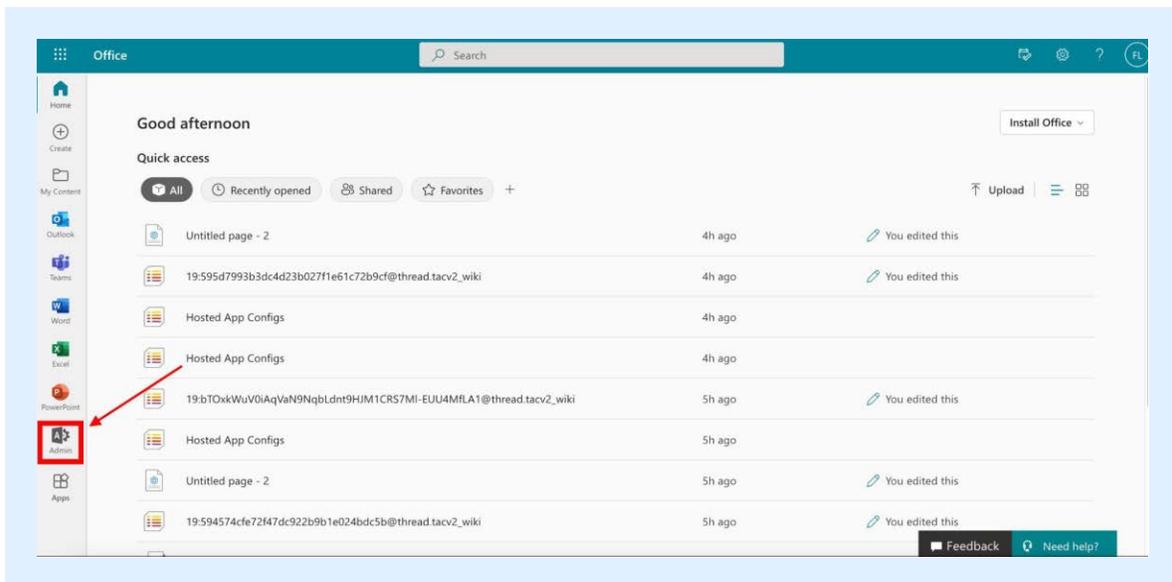


Figure 3.1.1 Admin button

Click the **ellipsis** button to show all admin content.

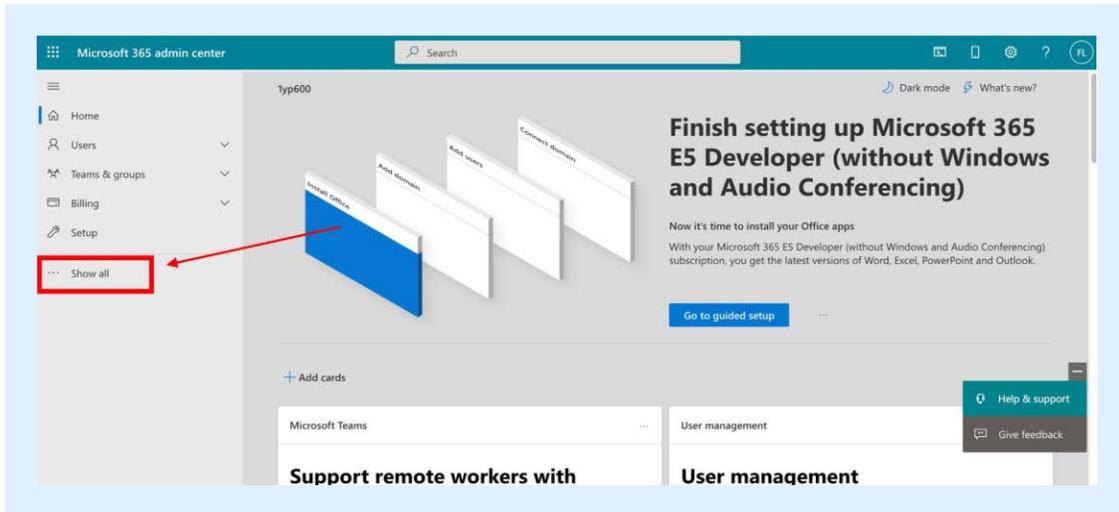


Figure 3.1.2 ...Show All button

Scroll down until you see Admin centers in the side panel. Click **SharePoint**.

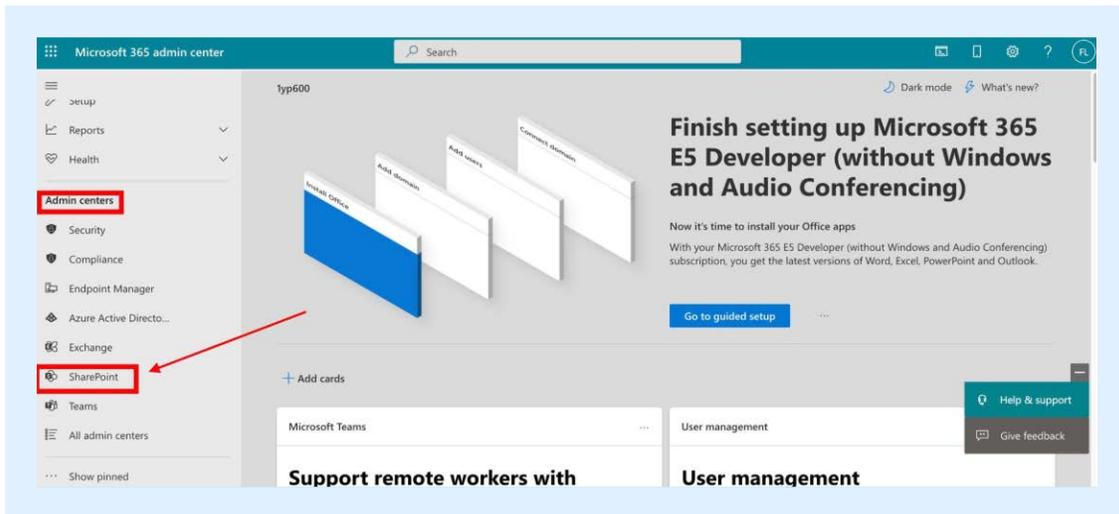


Figure 3.1.3 SharePoint button

Once you are in the SharePoint admin center, click **More features**.

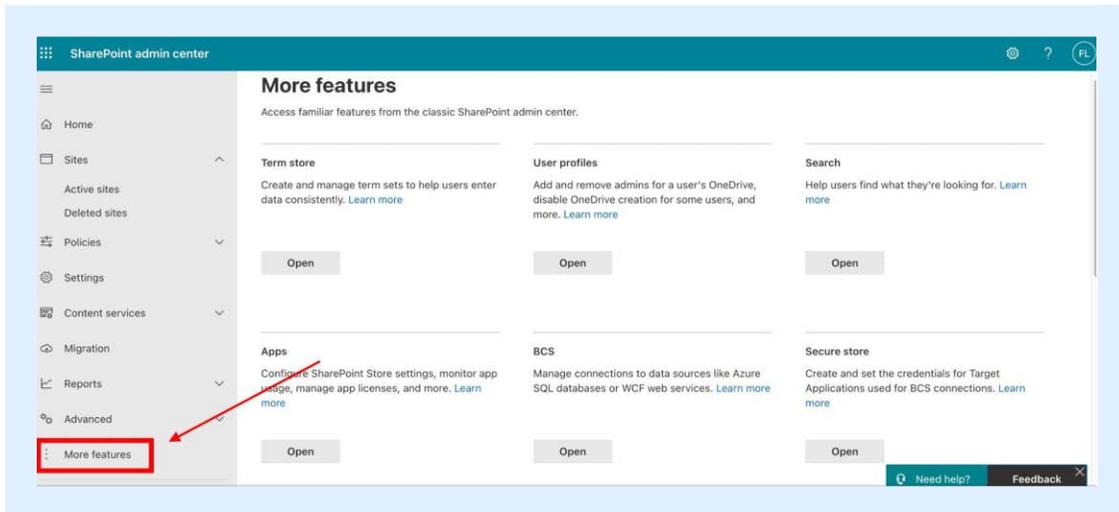


Figure 3.1.4 More Features button

From the More features page, look for Apps and click **Open**. This will take you to the App Catalog page.

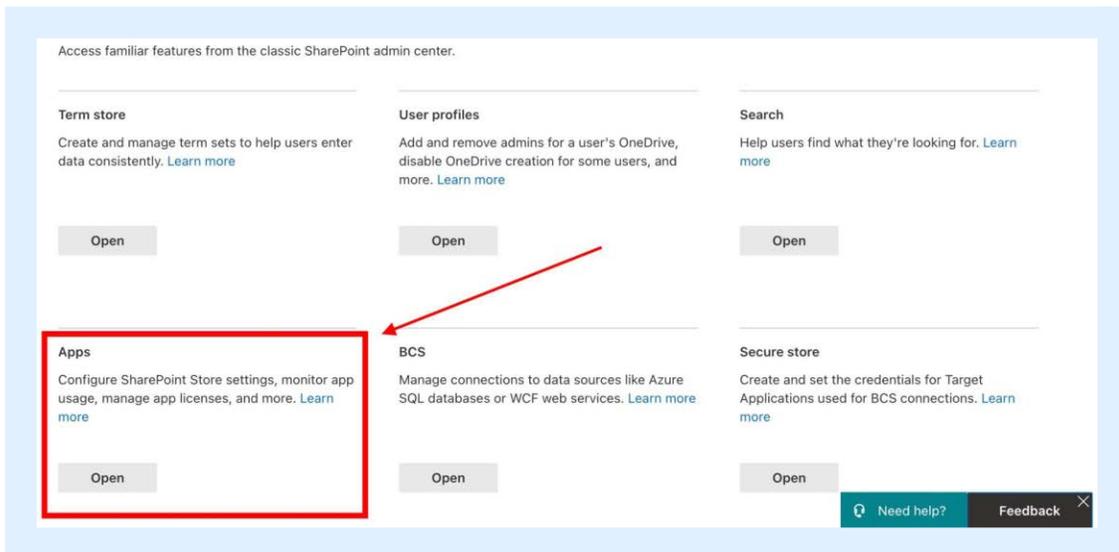


Figure 3.1.5 Open button

If you have created an App Catalog before, you will see this.

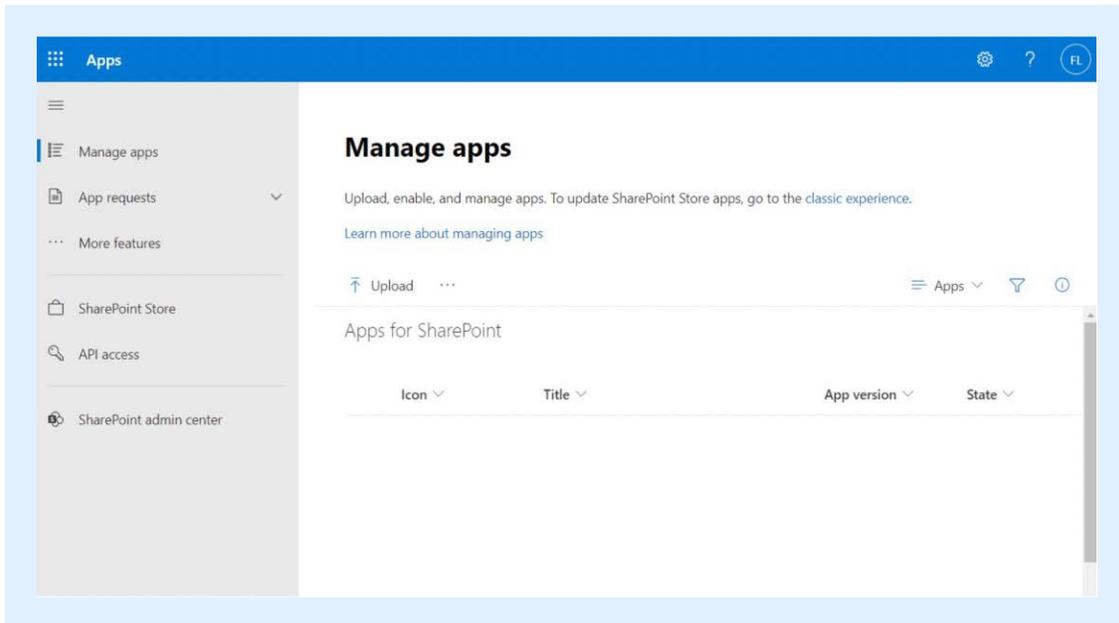


Figure 3.1.6 Tenant App Catalog

Otherwise, SharePoint will take a few minutes to create an App Catalog for you.

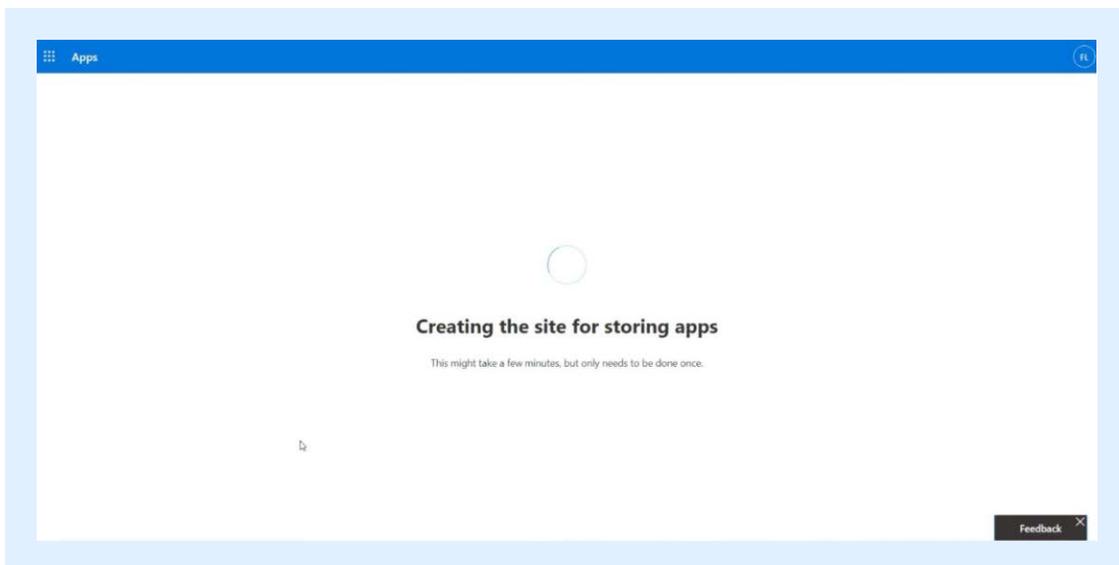


Figure 3.1.7 Creating Tenant App Catalog

After it is done, you will see this. Click **Got it**.

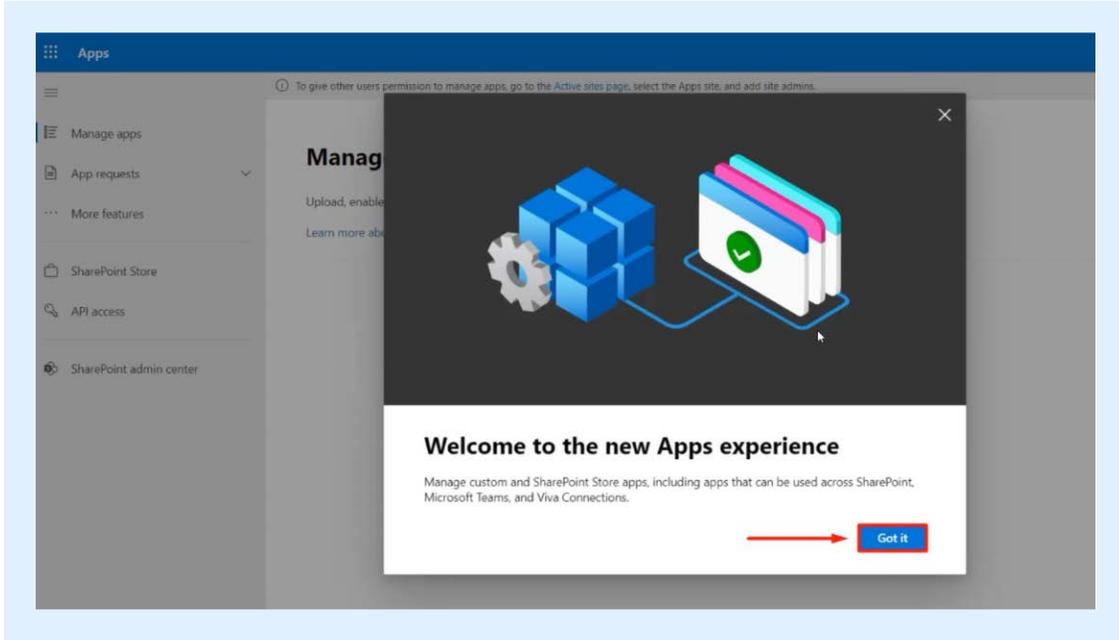


Figure 3.1.8 Got it button

On the App catalog, click the **Upload** button.

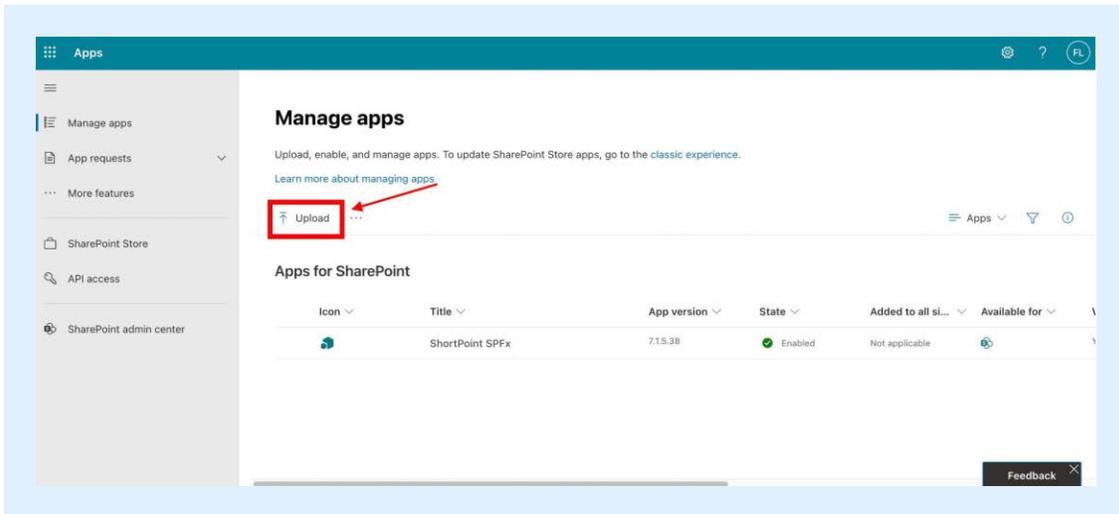


Figure 3.1.9 Upload button

From your files, find the extracted ShortPoint Teams folder and select the **shortpoint-spfx-teams.sppkg** file, then press **Open**.

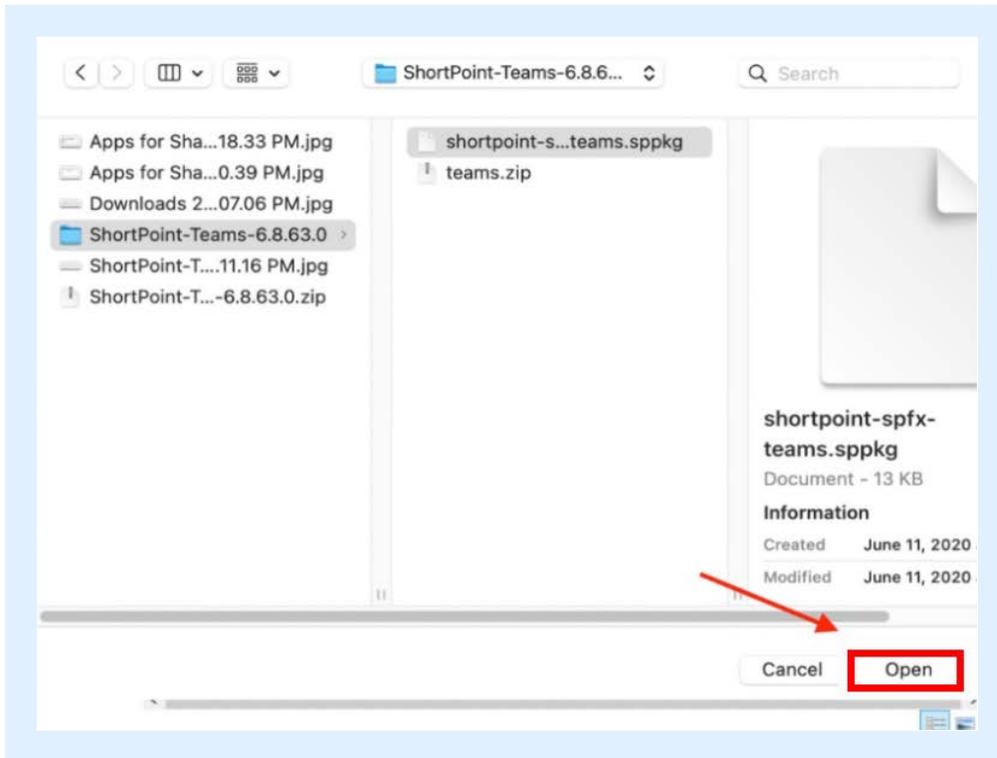


Figure 3.1.10 Open button

You will then get a prompt asking if you want to enable ShortPoint for Teams. Click **Enable app**.

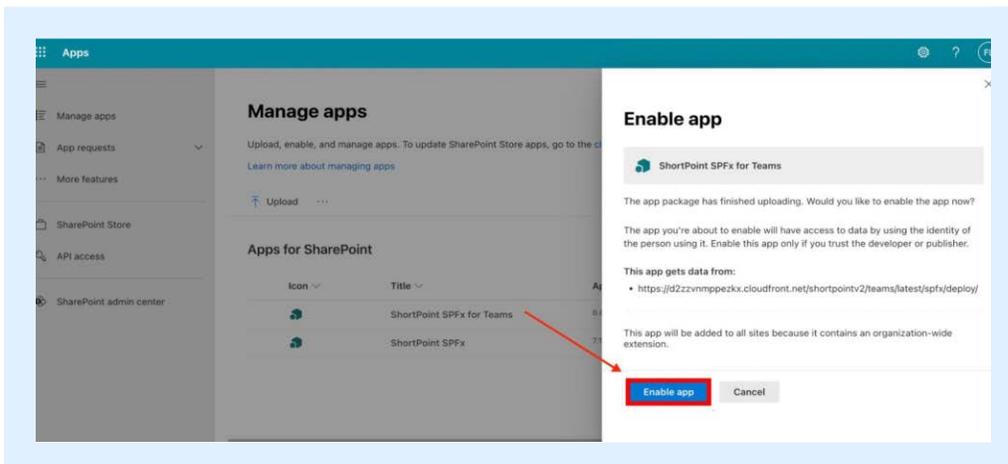


Figure 3.1.11 Enable app button

A notification stating that the app has been enabled will appear. Click **Close**.

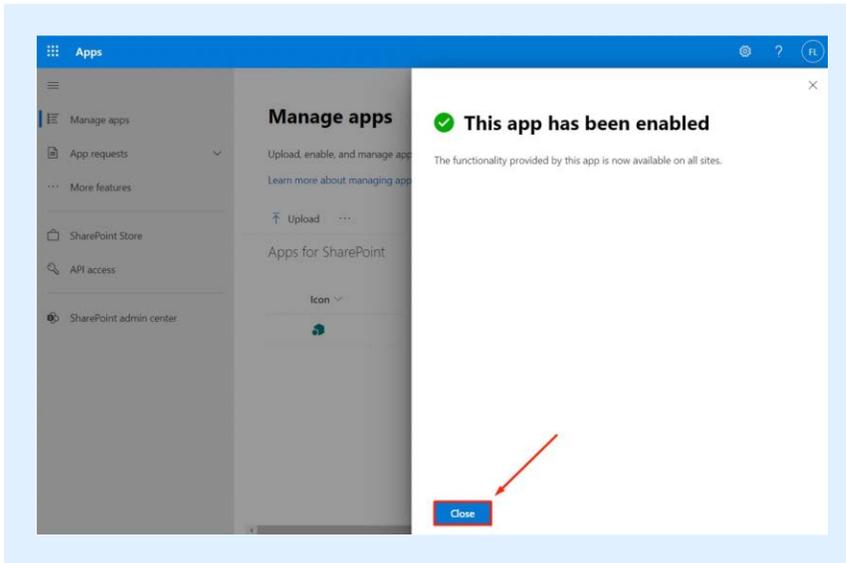


Figure 3.1.12 Close button

NOTE: If you see the error: “I cannot add the new package to App Catalog”, follow the steps in this article to fix the issue: [I Can Not Upload ShortPoint App to SharePoint App Catalog](#).

3.2 Checking if the ShortPoint App for Teams is Enabled

You must also ensure that your ShortPoint for Teams is enabled successfully. To do so, check the *State* column under *ShortPoint SPFx for Teams*. If you see **enabled**, it has been added successfully.

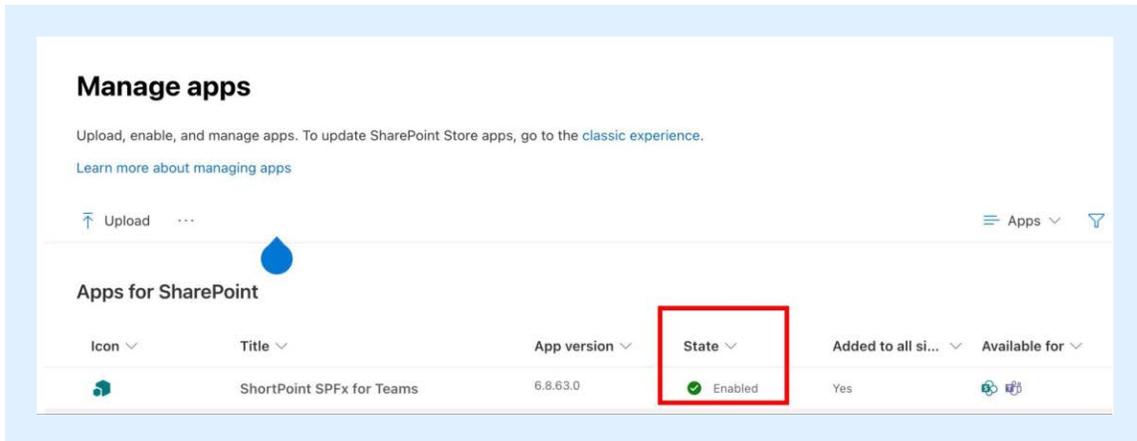


Figure 3.2.1 Enabled state

NOTE: If the app is disabled, check out [Known Issue: ShortPoint SPFx App Deployment Error - Deployment Failed. Correlation ID.](#)

Congratulations! You have successfully added the ShortPoint for Teams to the Tenant App Catalog. You may now proceed to the next section.

Section 4

Upload the ShortPoint App to the Teams App Catalog

This section shows how to upload the ShortPoint App to your Teams App Catalog. Check out the steps below to accomplish this section successfully.

To get started, open Microsoft Teams. You may use either the desktop app or the web browser.

Desktop:

Find the Microsoft Teams app from your list of desktop applications and select it to open.

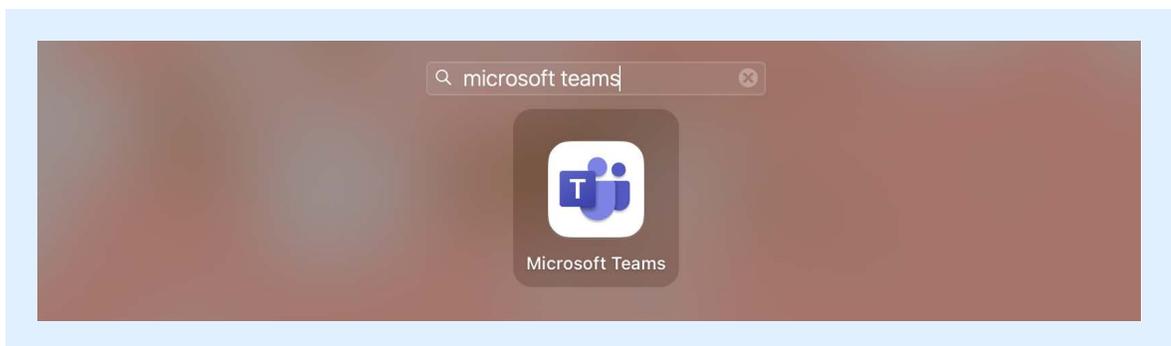


Figure 4.1.1 Microsoft Teams desktop app

Browser:

Go to teams.microsoft.com and log in to your account.

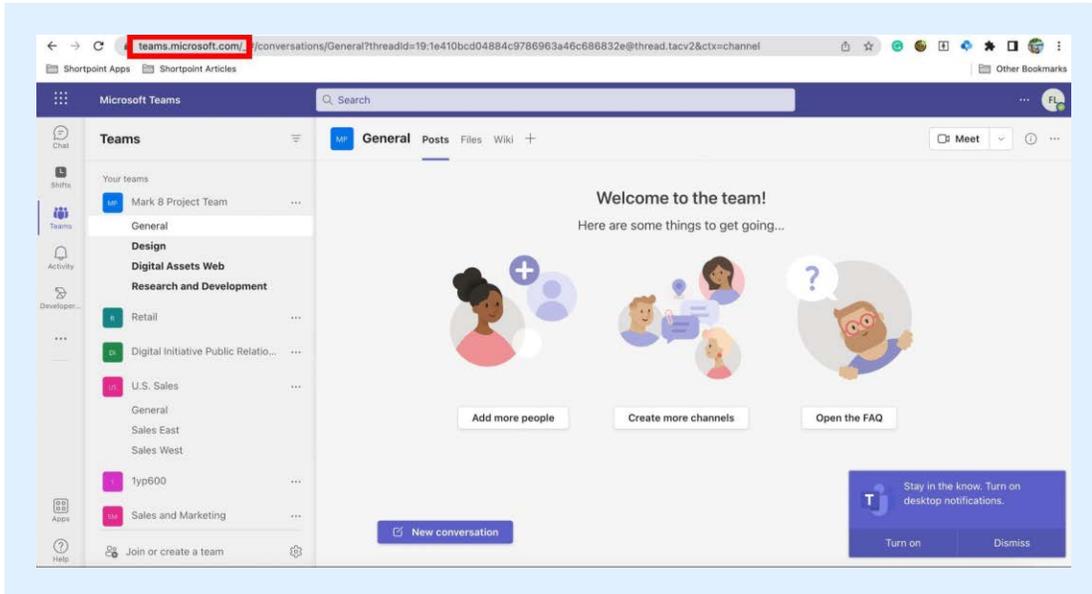


Figure 4.1.2 Microsoft teams web browser

Then, from the side panel, click **Apps**.

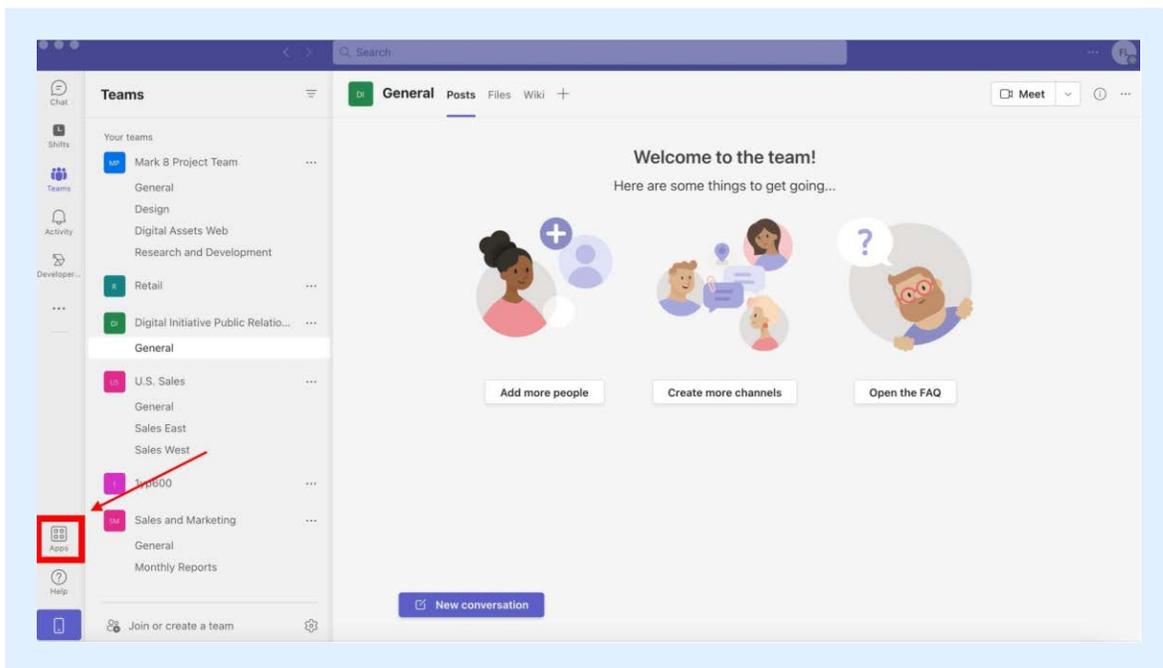


Figure 4.1.3 Apps button

Click the **Manage your apps** button from the side panel. This will take you to all your apps in Microsoft Teams.

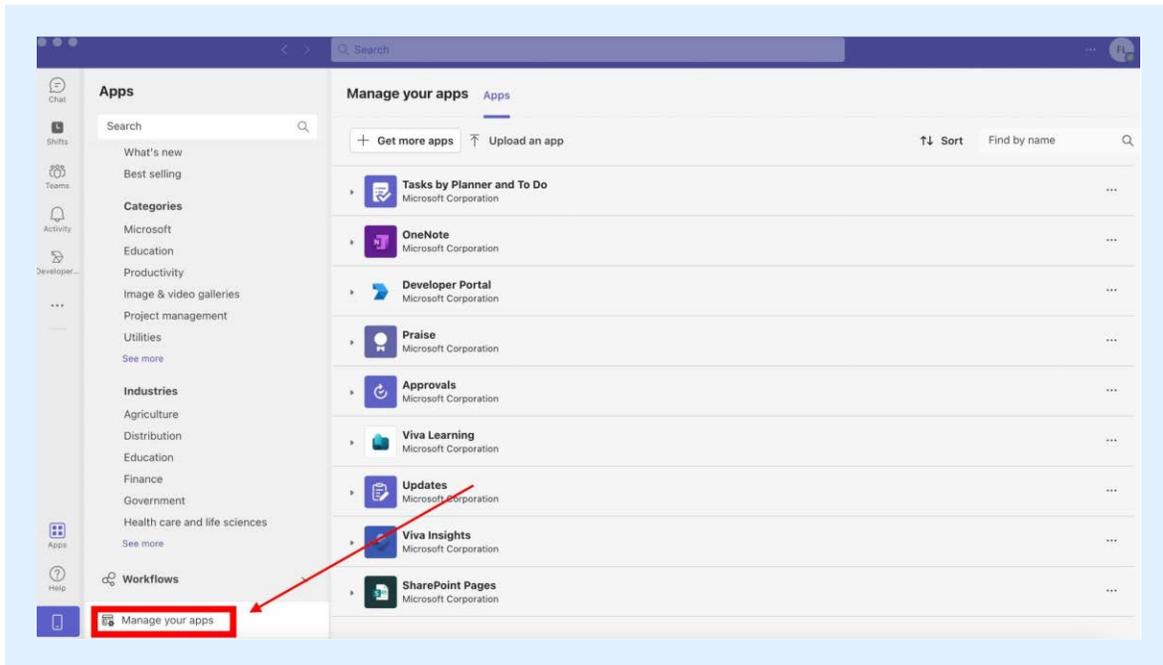


Figure 4.1.4 Manag your apps button

Click **Upload an app**.

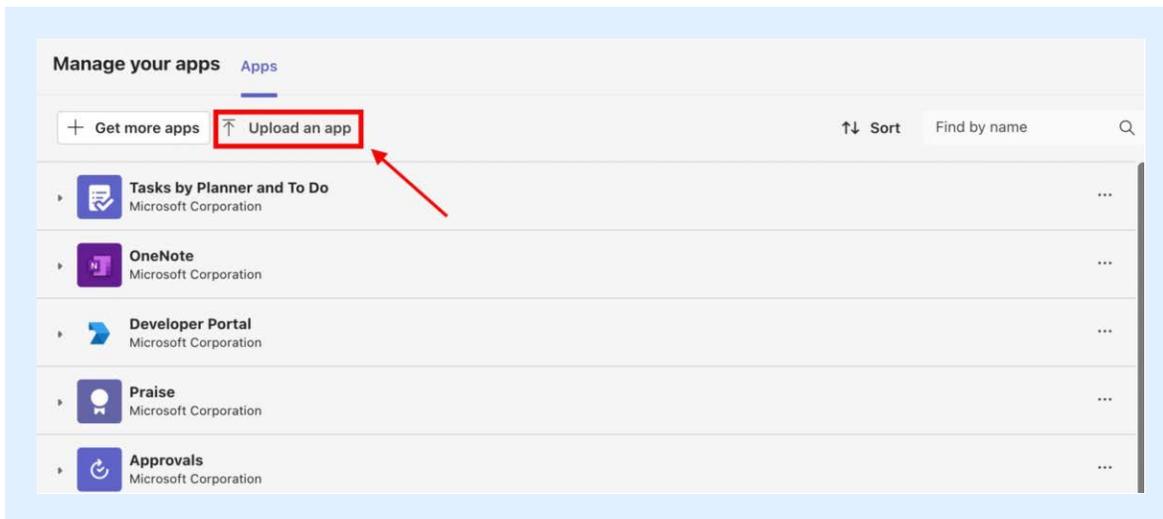


Figure 4.1.5 Upload an app button

Upon clicking, a pop-up window will appear. Choose to **Upload a custom app**.

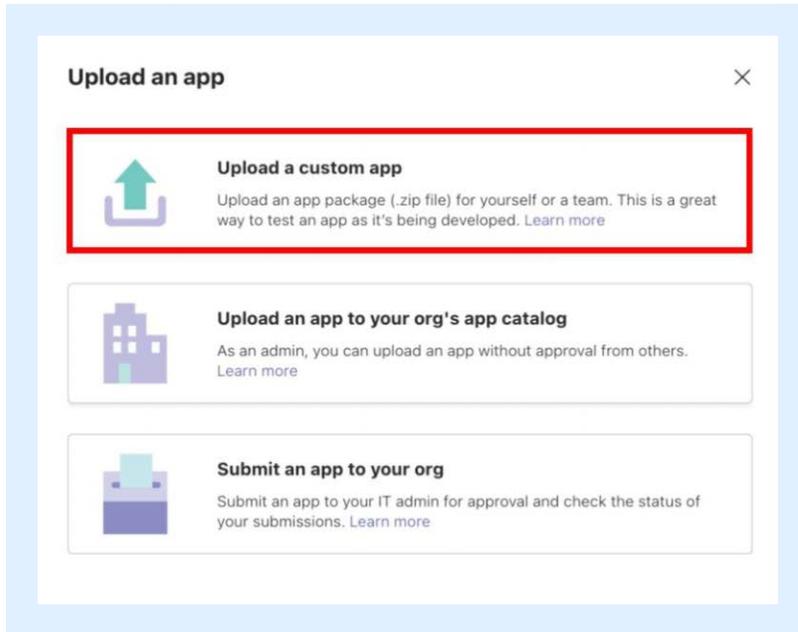


Figure 4.1.6 Upload a custom app button

Find the ShortPoint Teams folder you extracted earlier, select **Teams.zip**, and click **Open**.

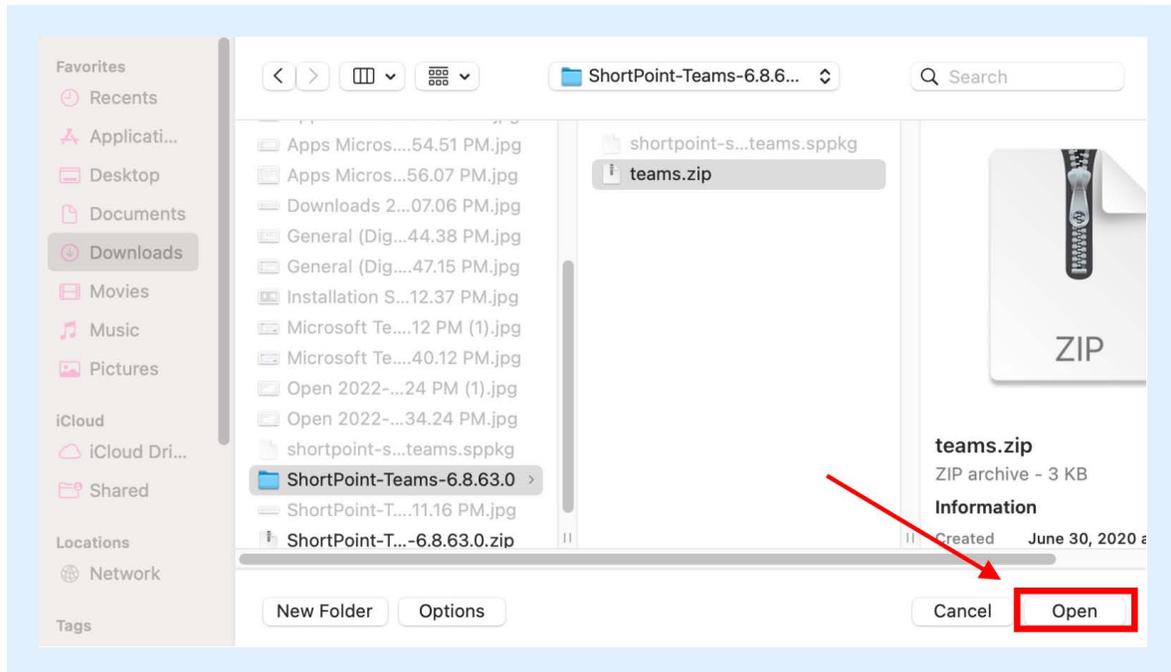


Figure 4.1.7 Open button

After opening teams.zip, another pop-up window will appear. Click **Add to a team**.

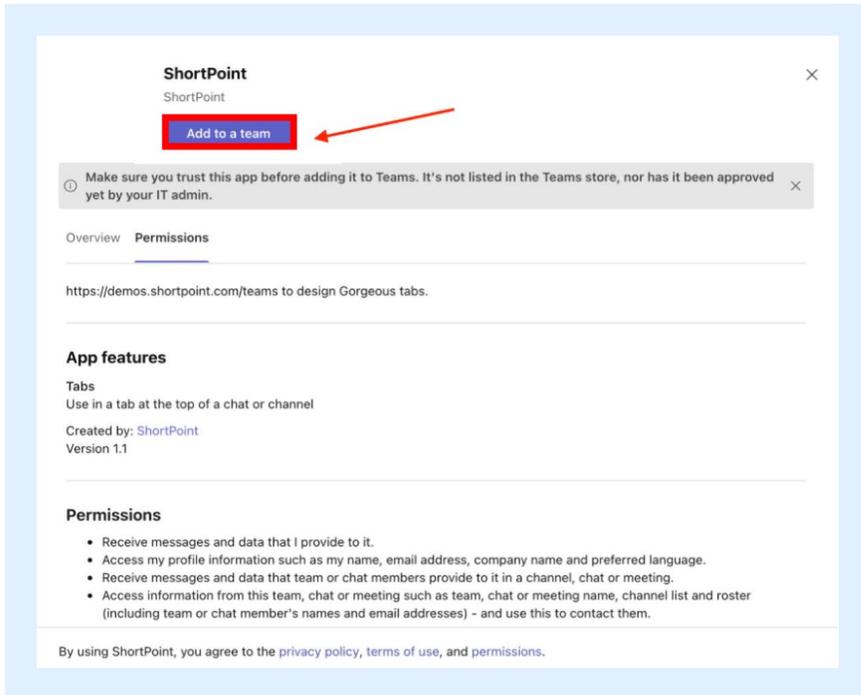


Figure 4.1.8 Add to a team button

This will prompt you to add ShortPoint to any of your Teams channels. Select any channel you prefer.

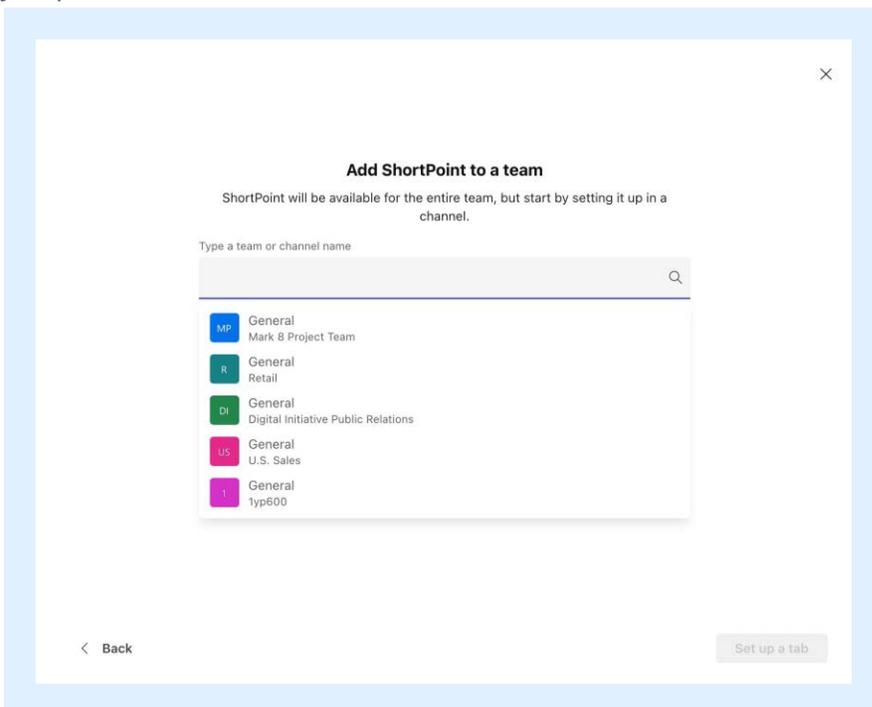


Figure 4.1.9 Teams channel list

After selecting a Teams channel, click **Set up a tab**.

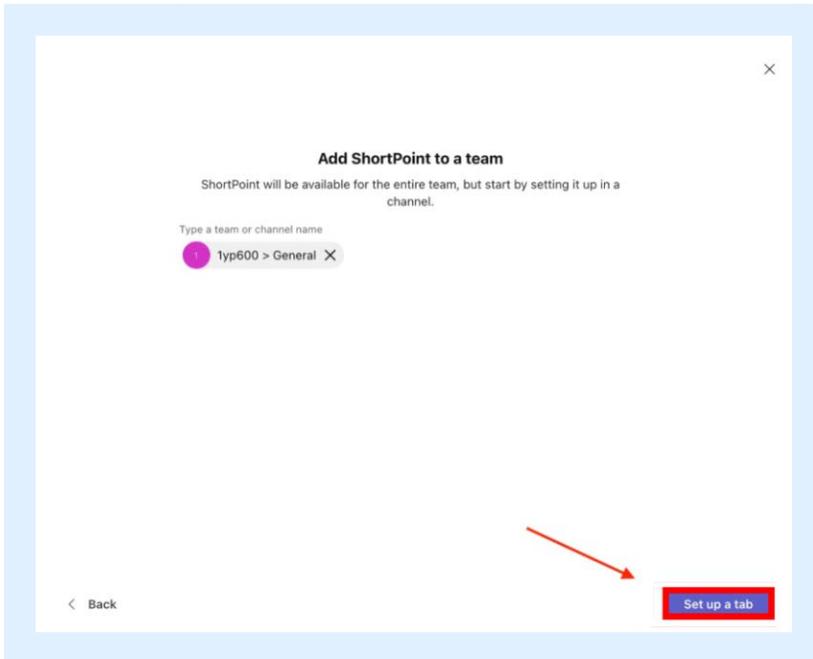


Figure 4.1.10 Set up a tab button

You will then be prompted to **Save**.

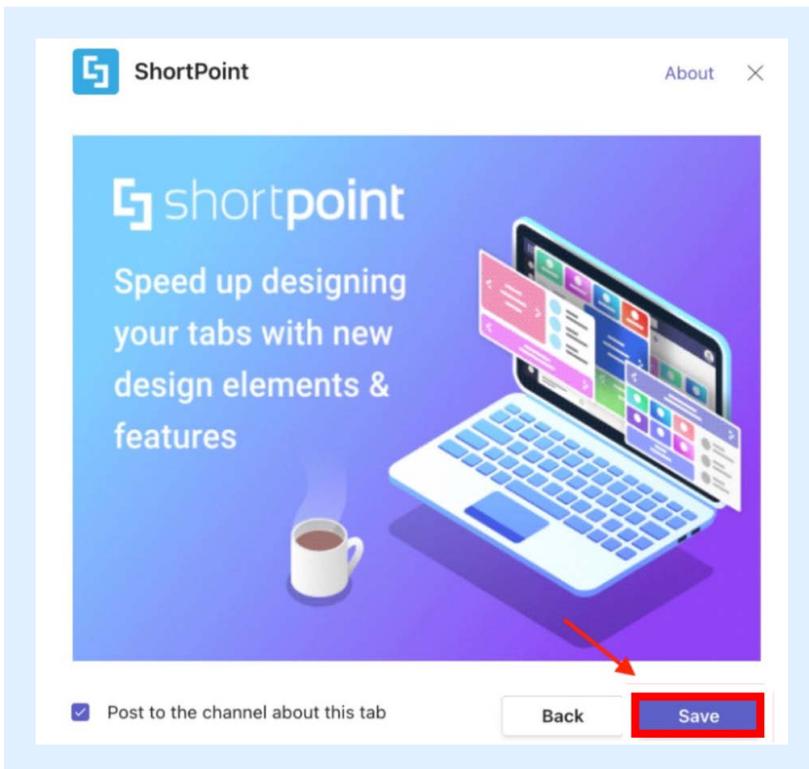


Figure 4.1.11 Save button

After saving, you will notice a **ShortPoint tab** on the Teams channel you selected earlier.

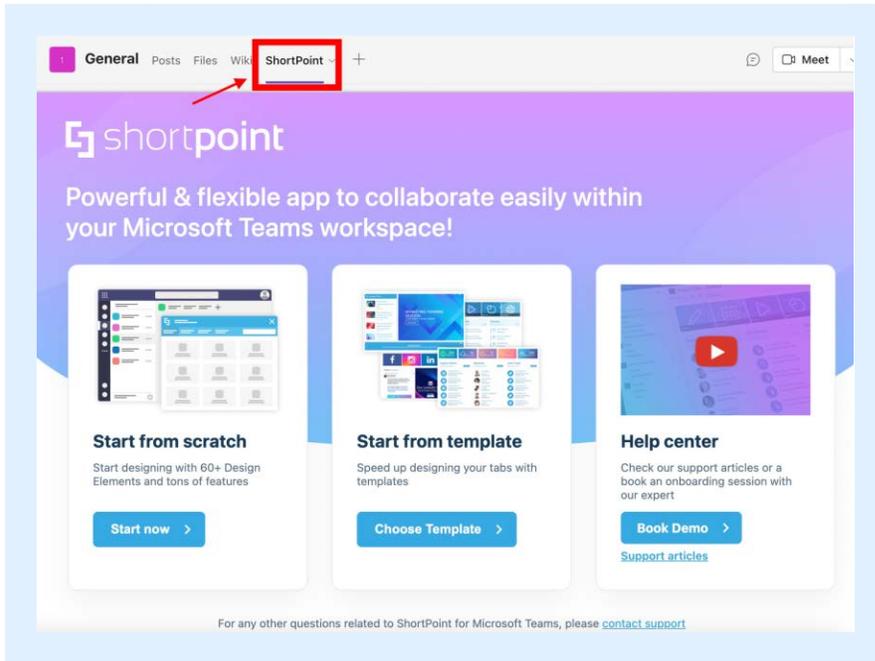


Figure 4.1.12 ShortPoint tab

You will also see the **ShortPoint custom app** on your Apps menu.

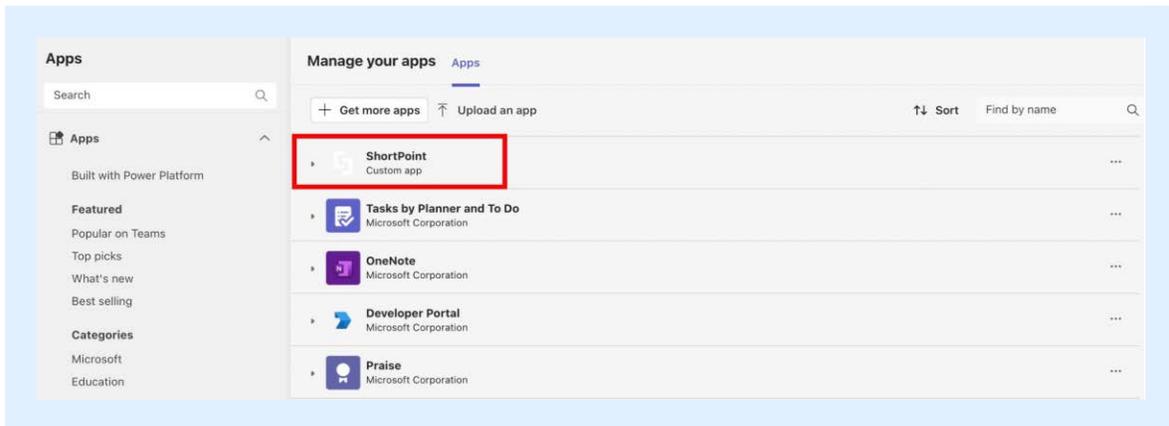


Figure 4.1.13 ShortPoint Custom app

You have now added the ShortPoint App to your Teams App Catalog. You may now proceed to the next section.

Section 5

Add ShortPoint Tab to Teams Channel

This section will discuss the two ways to add the ShortPoint tab to your Teams channel. Proceed with the option you are most comfortable with.

5.1 Option 1: Adding the ShortPoint Tab using Manage Your Apps

Open Microsoft Teams and from the side panel, select **Apps**.

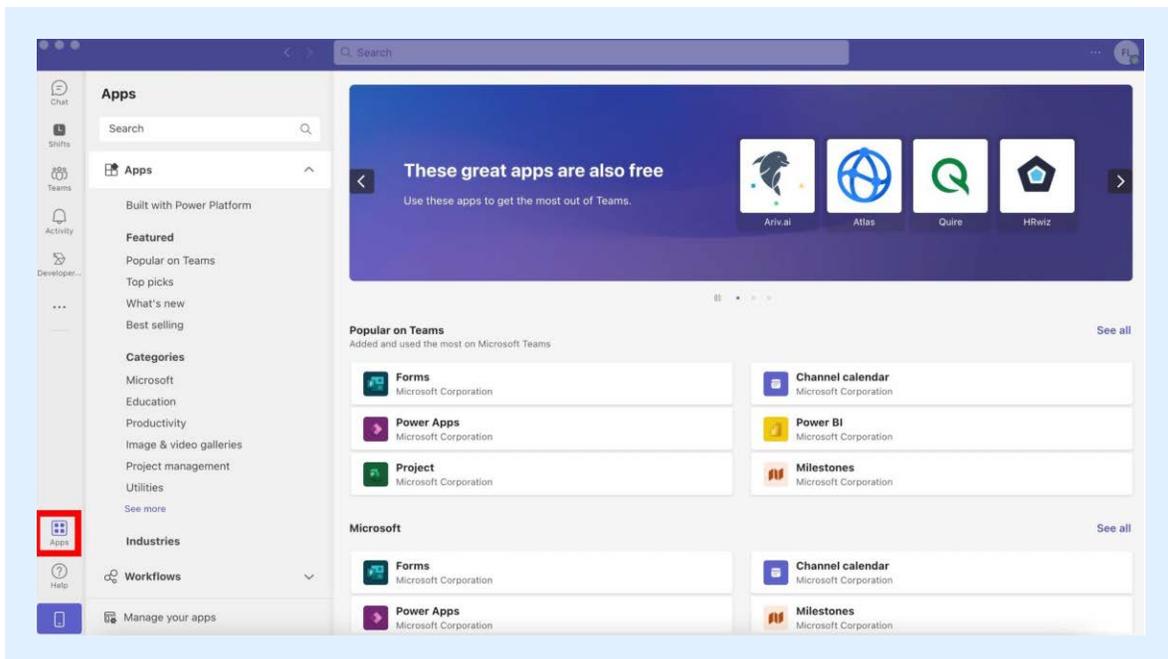


Figure 5.1.1 ShortPoint Custom app

From the Apps side panel, select **Manage your apps**.

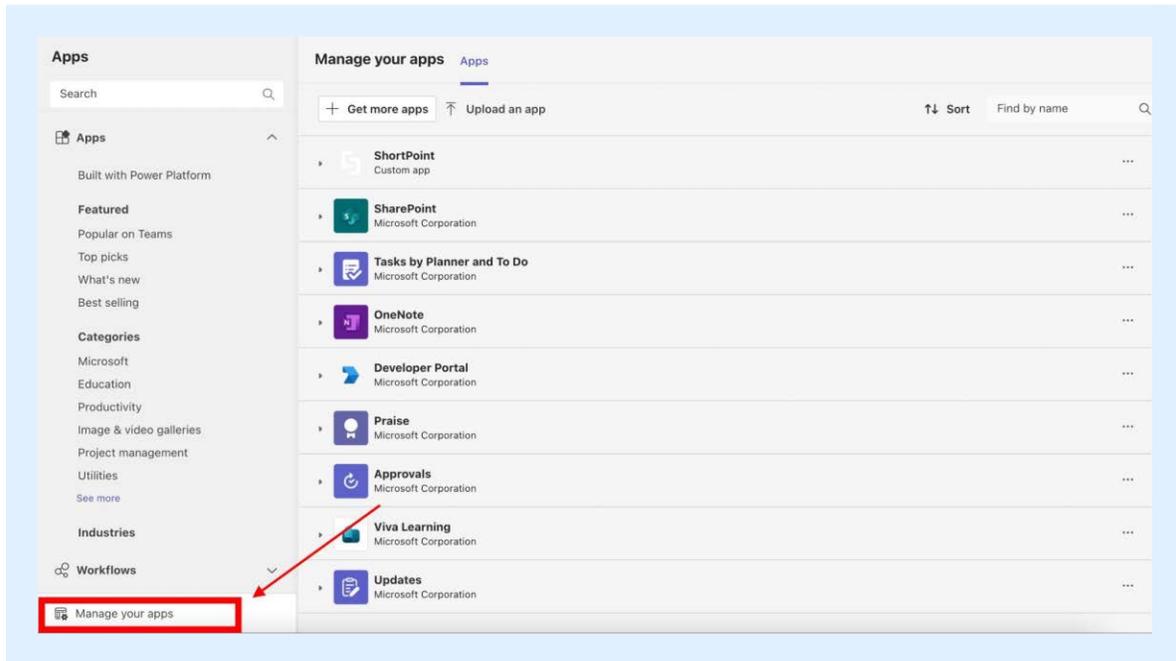


Figure 5.1.2 ShortPoint Custom app

Use the search bar to find the **ShortPoint custom app** and click it. It will expand to show all the Teams channels that currently have the ShortPoint tab.

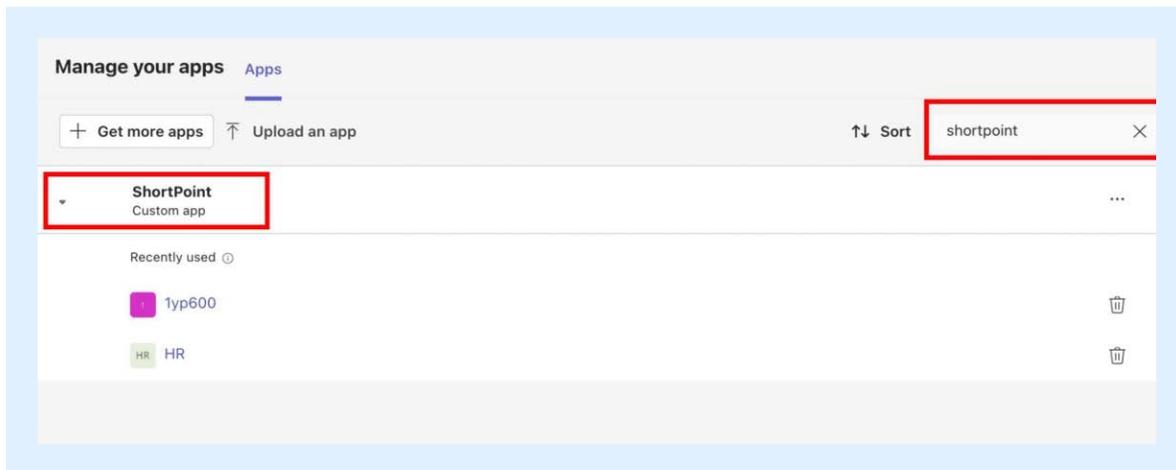


Figure 5.1.3 ShortPoint Custom app

Press the **ellipsis** on the right side of the screen and click **View Details**.

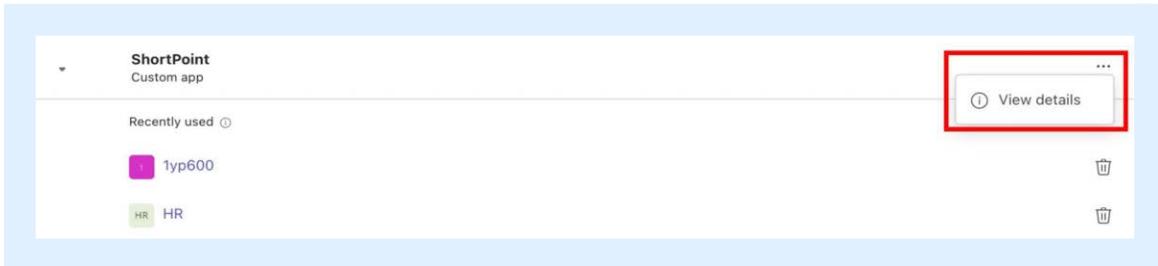


Figure 5.1.4 ShortPoint Custom app

A pop-up window will appear containing more details about the ShortPoint app. Click **Add to a team**.

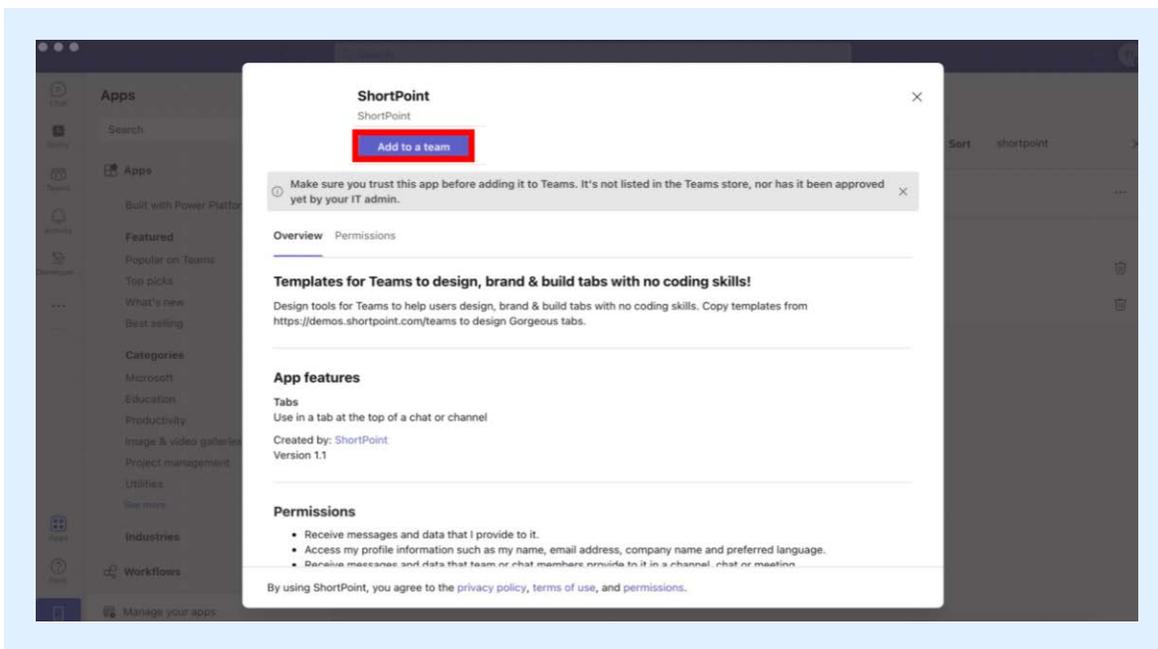


Figure 5.1.5 ShortPoint Custom app

The Teams channel you previously added will appear. Click the **cross** button.

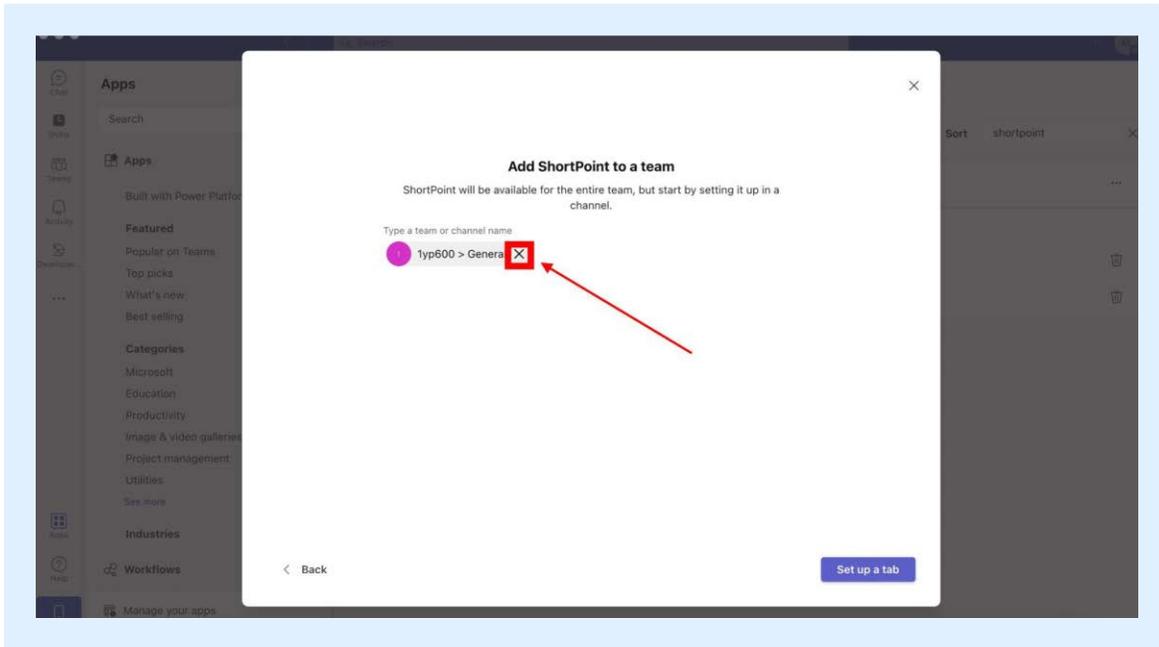


Figure 5.1.6 ShortPoint Custom app

Use the search bar to find the Teams channel you want ShortPoint to be added.

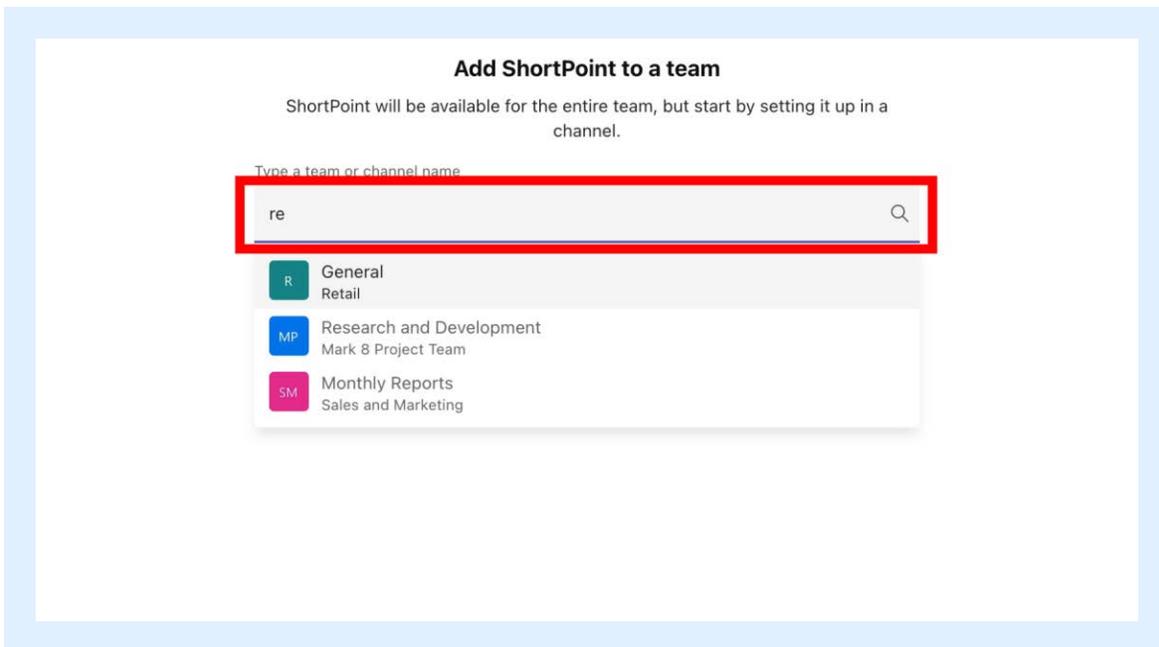


Figure 5.1.7 ShortPoint Custom app

Then, click **Set up a tab**.

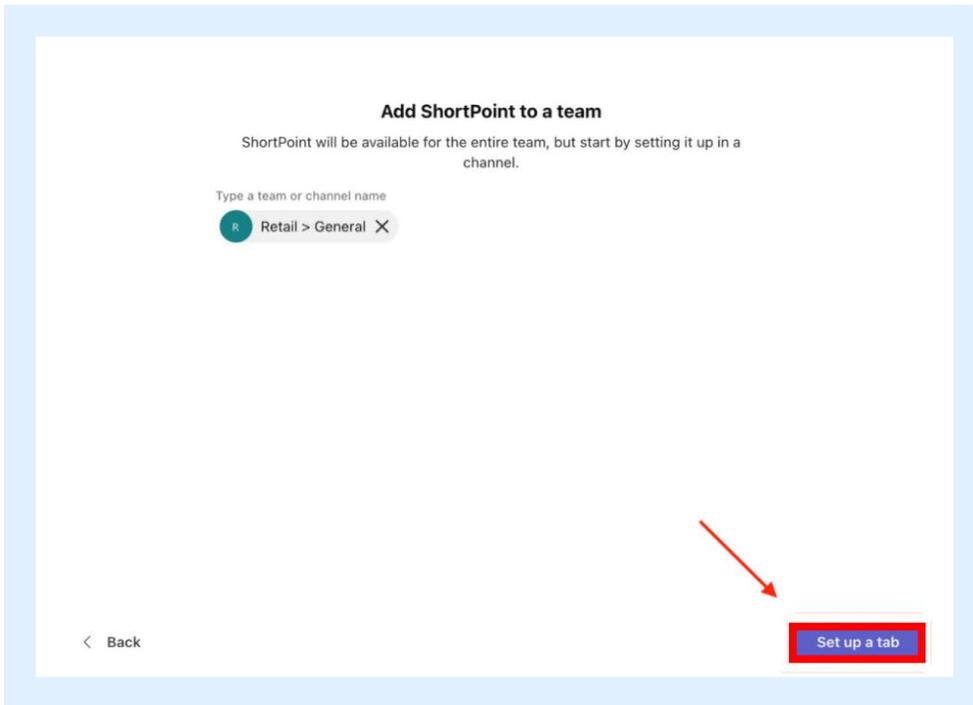


Figure 5.1.8 ShortPoint Custom app

A prompt to save will appear. Click **Save**.

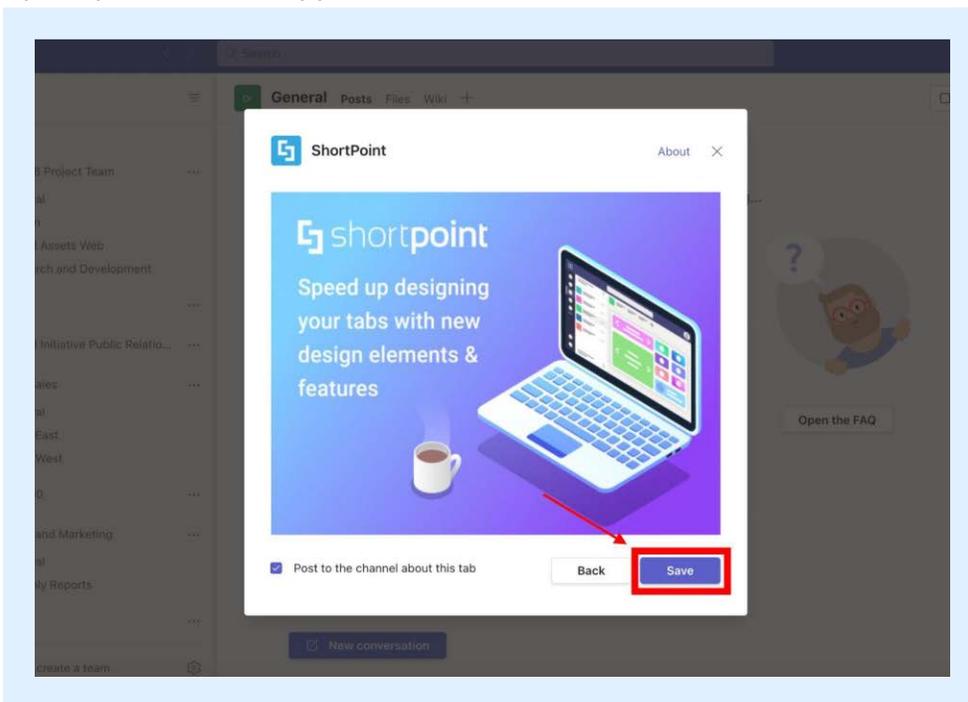


Figure 5.1.9 ShortPoint Custom app

Done! You can now see the ShortPoint tab on your Teams channel.

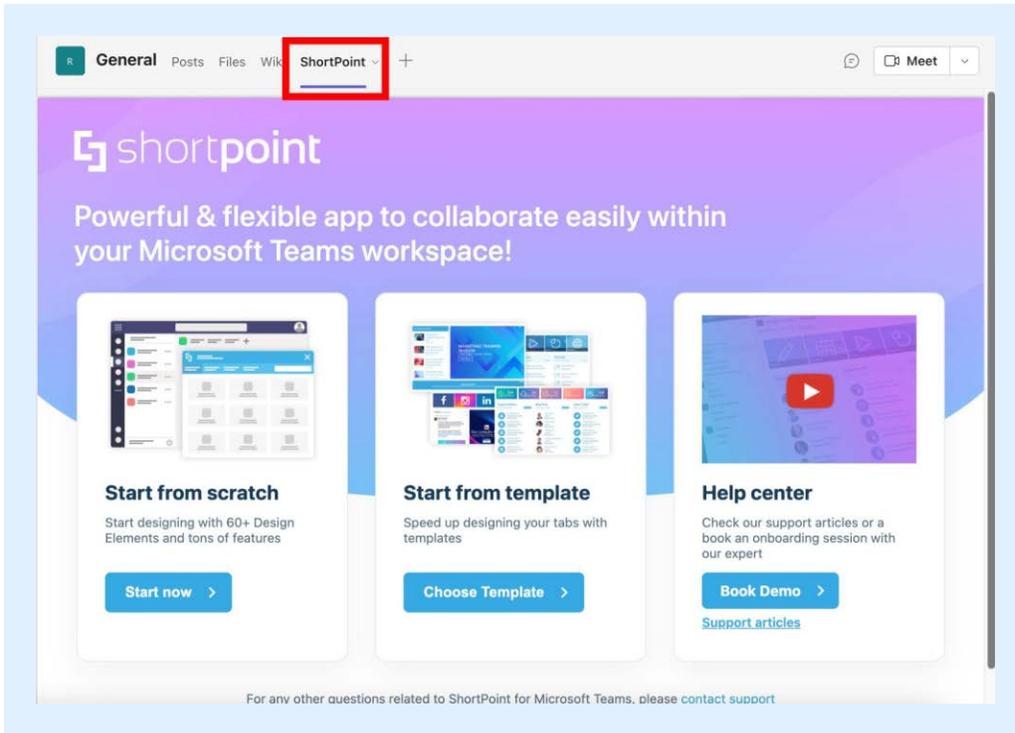


Figure 5.1.10 ShortPoint Custom app

5.2 Option 2: Adding the ShortPoint Tab using Teams

Open Microsoft Teams and select **Teams** from the side panel.

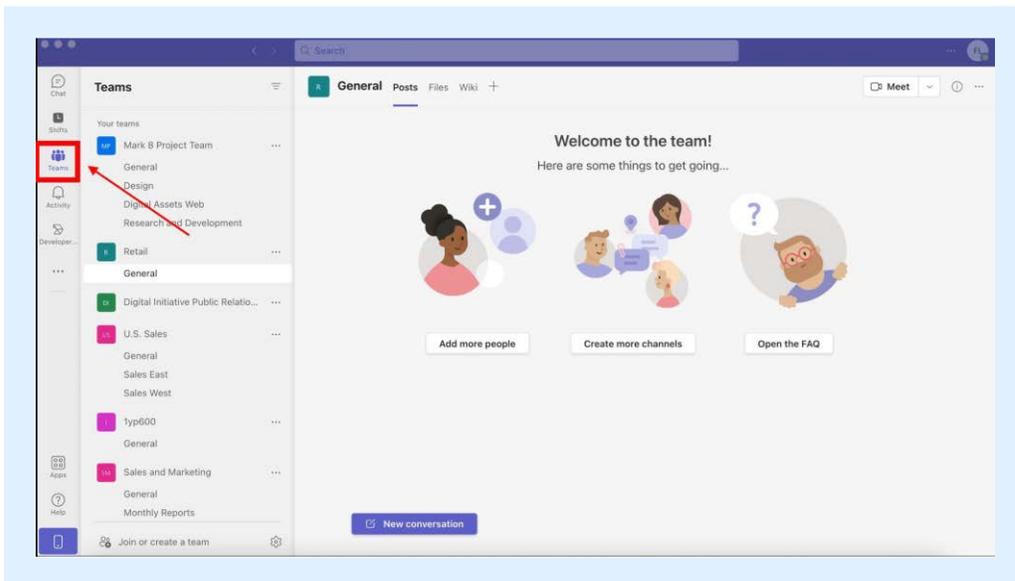


Figure 5.2.1 ShortPoint Custom app



From *Your teams*, choose any channel where you want ShortPoint to be added.

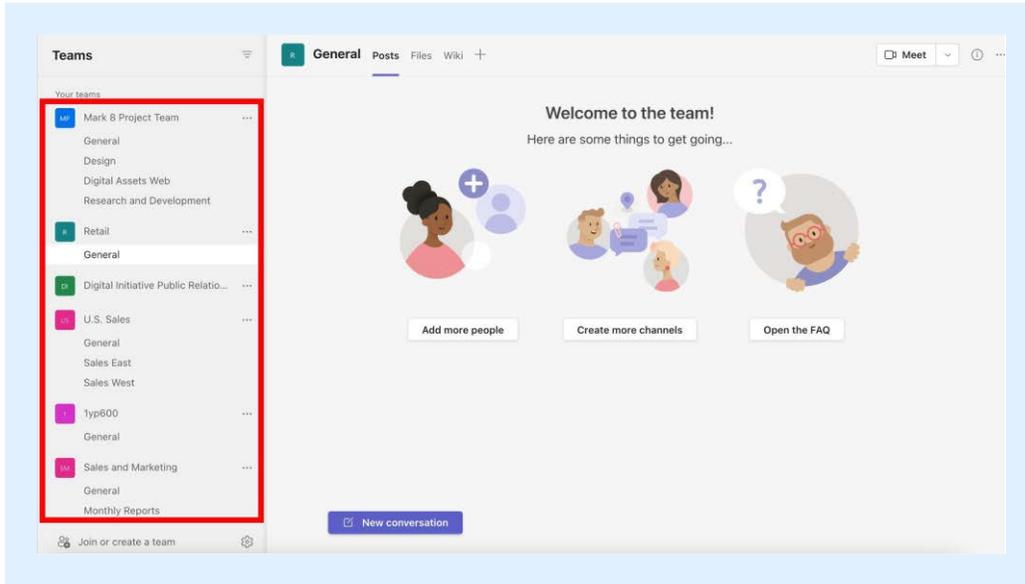


Figure 5.2.2 ShortPoint Custom app

Once you have selected a channel, click the **plus** button at the top of the page to add a new tab.

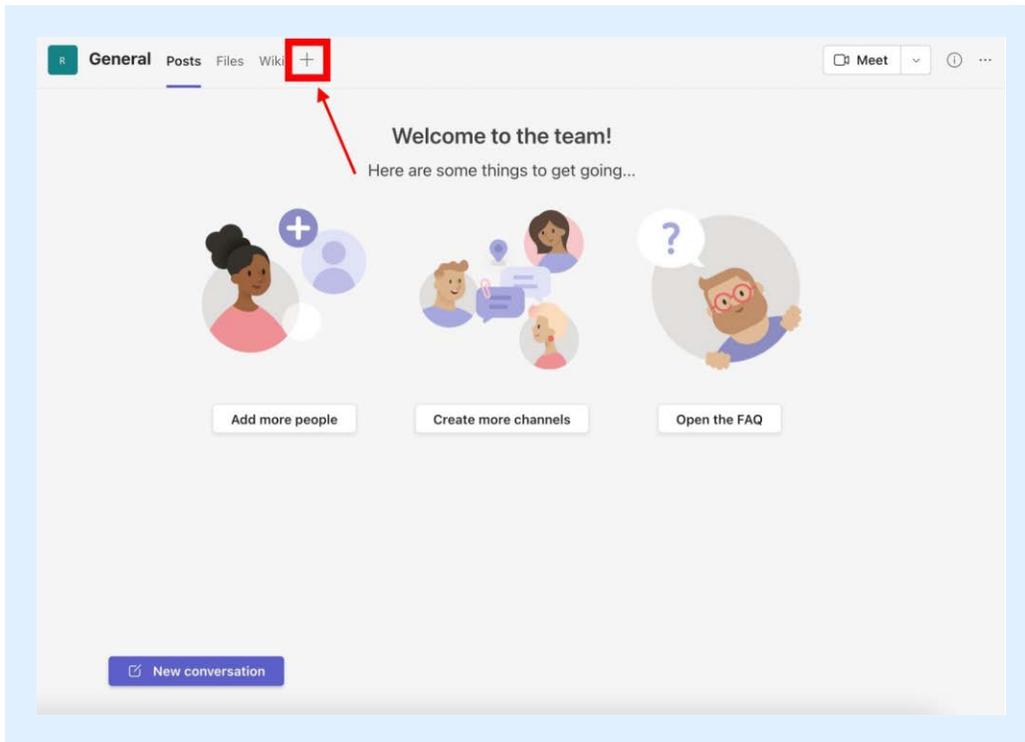


Figure 5.2.3 ShortPoint Custom app

A pop-up window will appear. Search for ShortPoint using the search bar and click the **ShortPoint app** to add it as a tab.

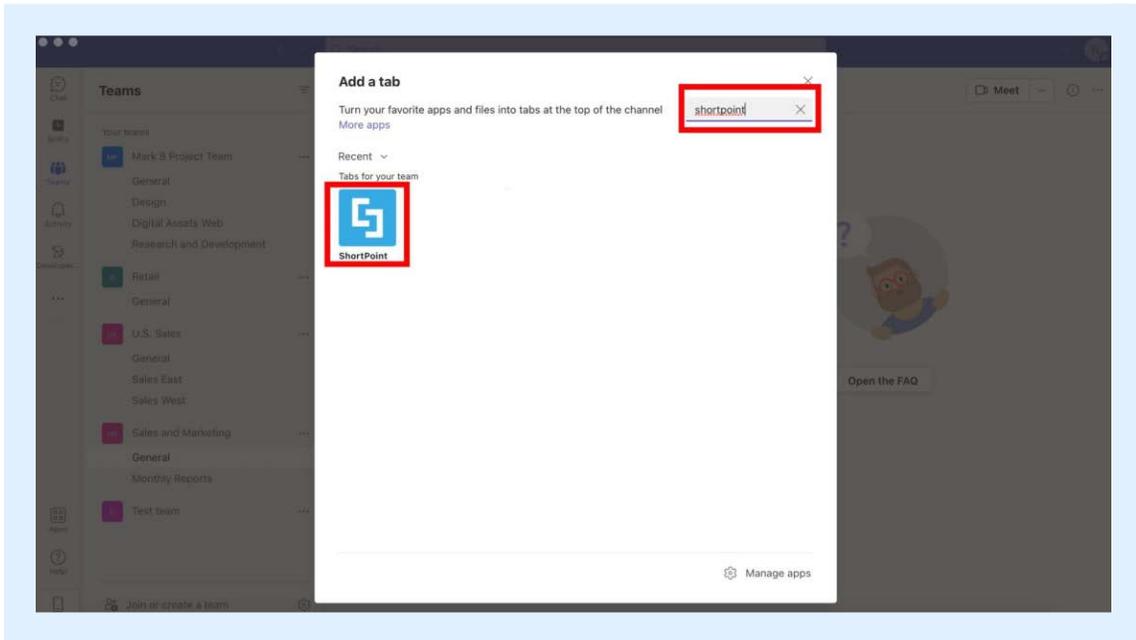


Figure 5.2.4 ShortPoint Custom app

A prompt to save will appear. Click **Save**.

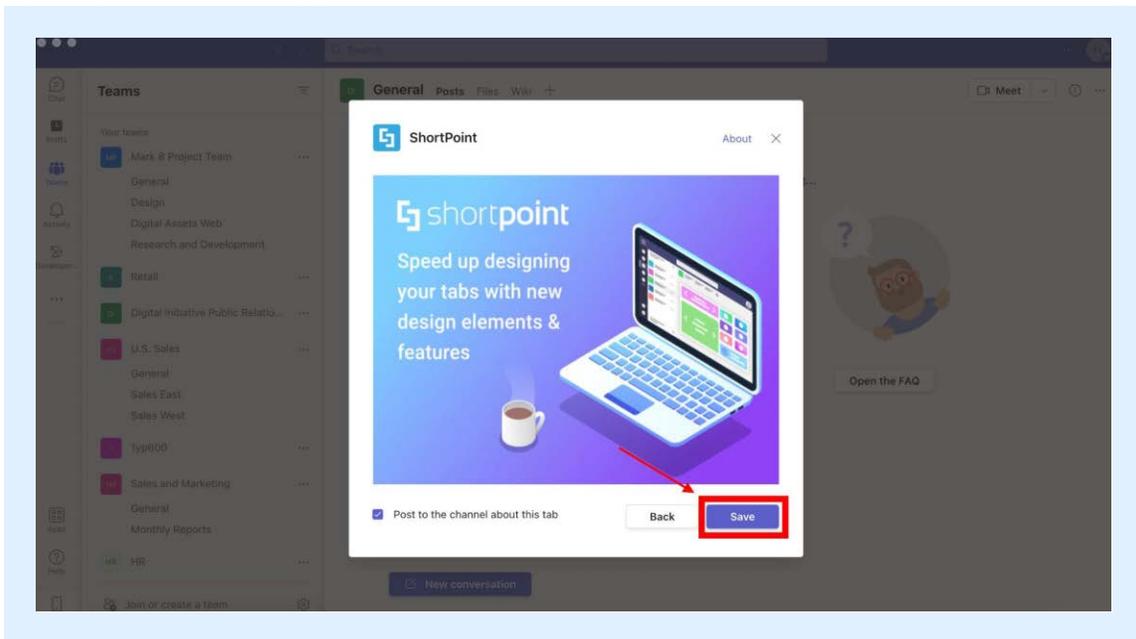


Figure 5.2.5 ShortPoint Custom app



And you are done! Congratulations, you have successfully added the ShortPoint tab to your Teams channel.

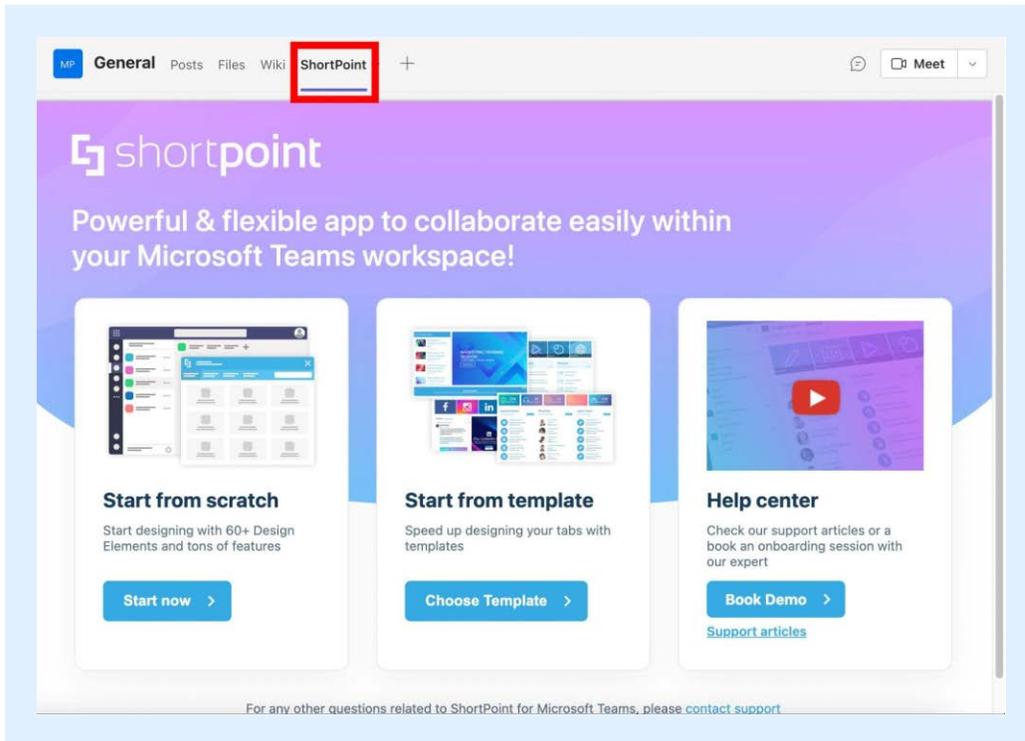


Figure 5.2.6 ShortPoint Custom app



Section 6

Post-Installation

This section describes how to activate your license after purchasing one and how to assign ShortPoint Designers.

6.1 License Activation

After purchasing a Full License from ShortPoint, the license will automatically be activated. You do not need to do anything on your end to activate.

If you want to check the status of your license, go to any ShortPoint tab. Click the *down-arrow* icon (1) and select **Settings** (2) from the drop-down.

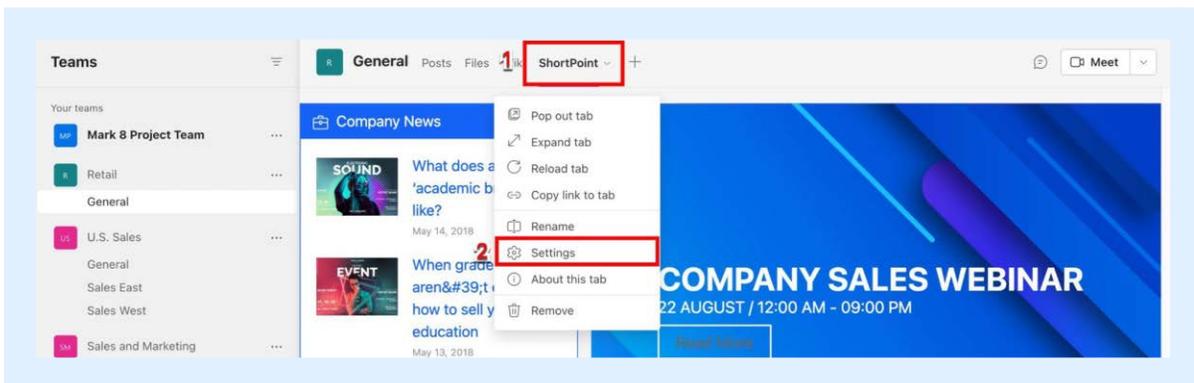


Figure 6.1.1 ShortPoint tab

You will be redirected to the Page Builder. From there, click the **cogwheel** button.

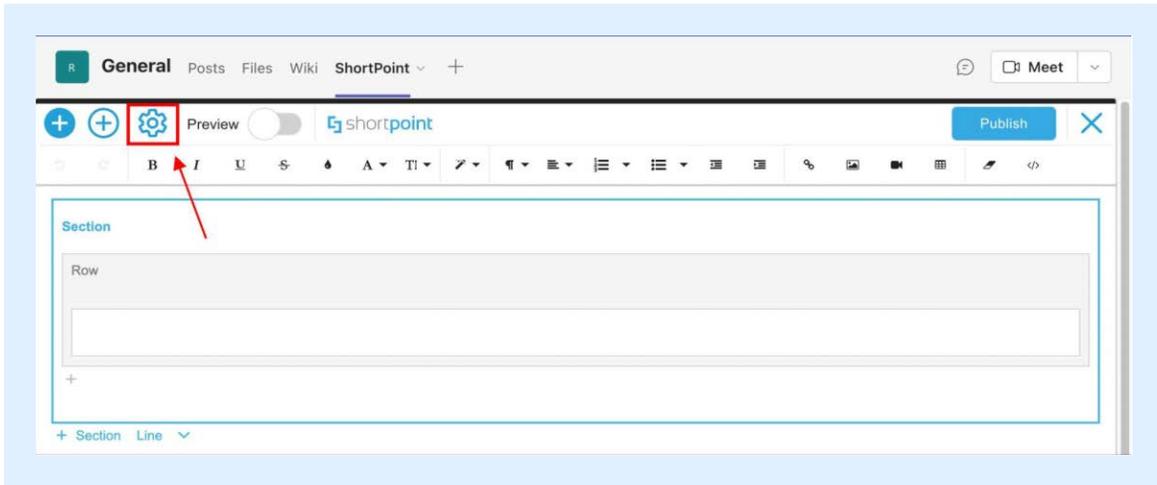


Figure 6.1.2 Cogwheel button

From the pop-up page, switch to the **License** tab. You will see your license status and the number of days left before renewal.

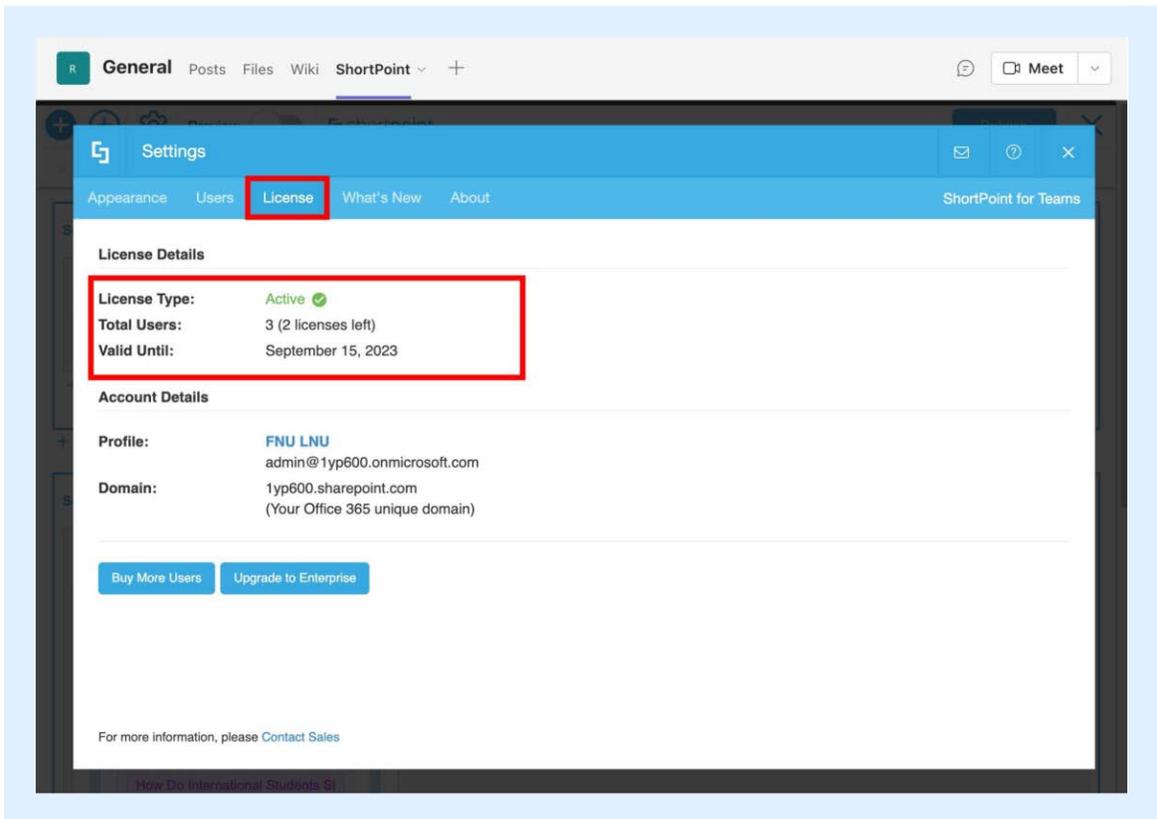


Figure 6.1.3 License tab

6. 2 Assigning Users

NOTE: Only the ShortPoint License Manager is allowed to assign ShortPoint Designers. By default, ShortPoint assigns the user who requested the ShortPoint for Teams trial as the ShortPoint License Manager.

To assign ShortPoint designers, go to any ShortPoint tab. Click the *down-arrow* icon (1) and select **Settings** (2) from the drop-down.

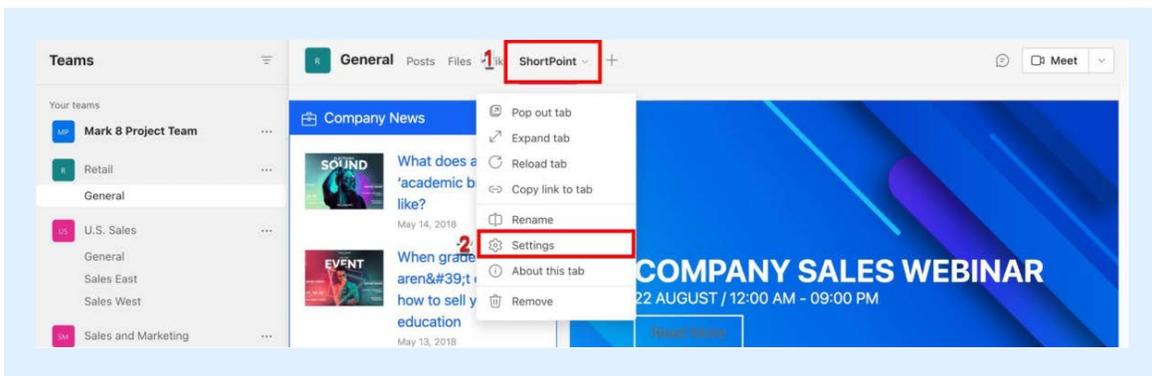


Figure 6.2.1 ShortPoint tab

You will be redirected to the Page Builder. From there, click the **cogwheel** button.

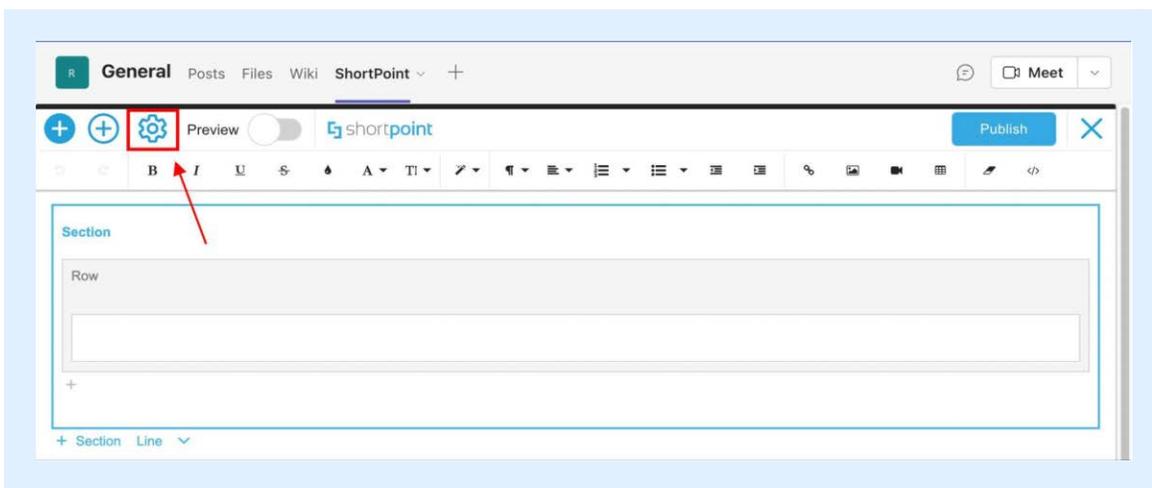


Figure 6.2.2 Cogwheel button

From the pop-up page, switch to the *Users* tab (1) then click **Assign New User** (2).

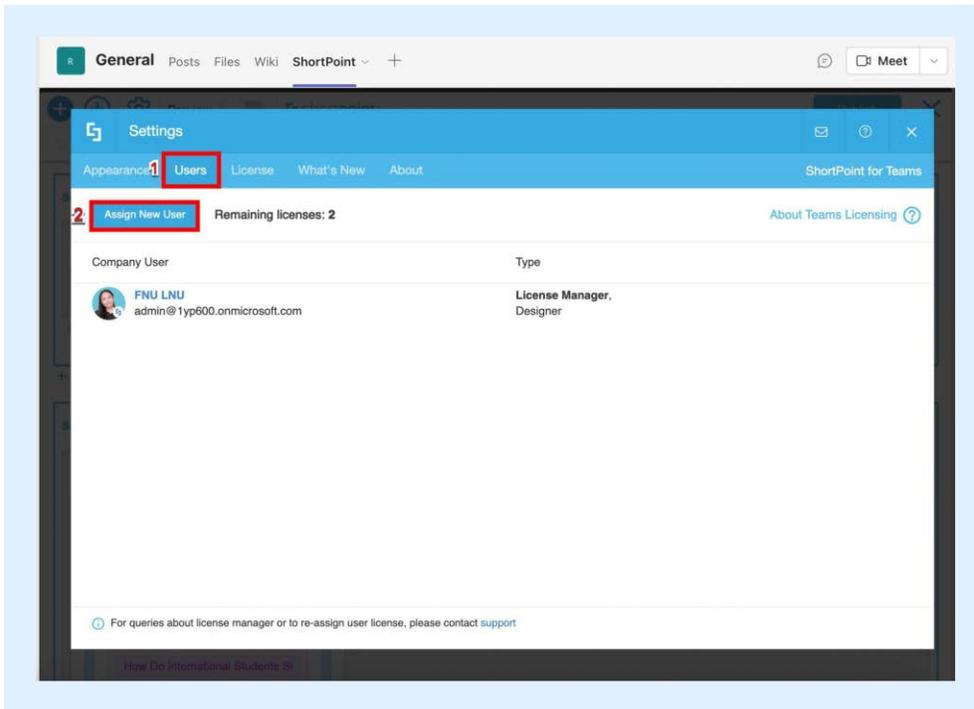


Figure 6.2.3 Users Tab

Type the email address of the co-worker you want to assign as a ShortPoint Designer. Then, click **Assign License**.

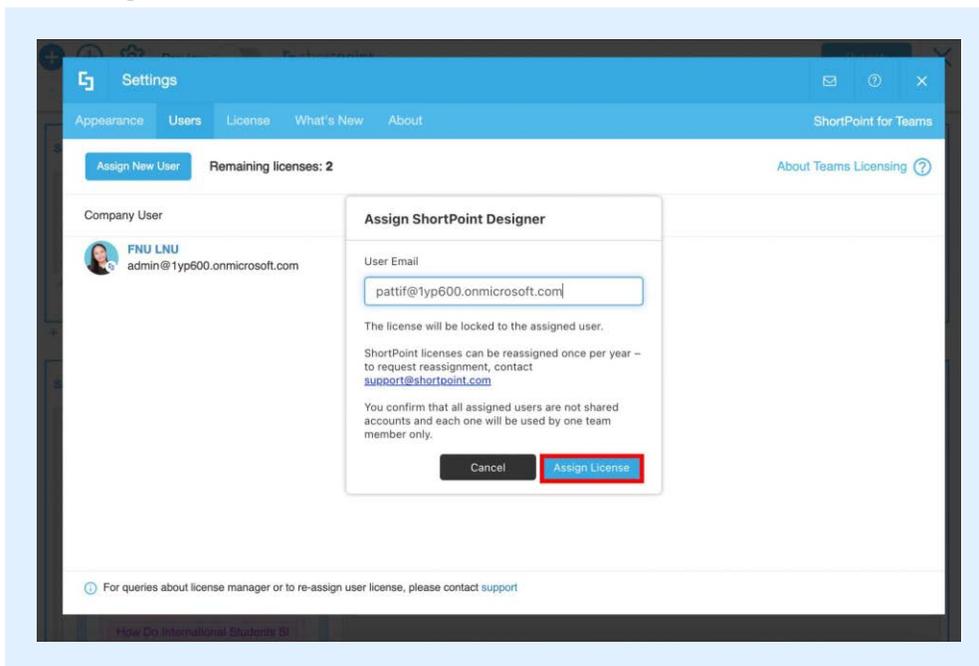


Figure 6.2.4 Assign License button

You will now see the profile of the assigned user on your Users tab.

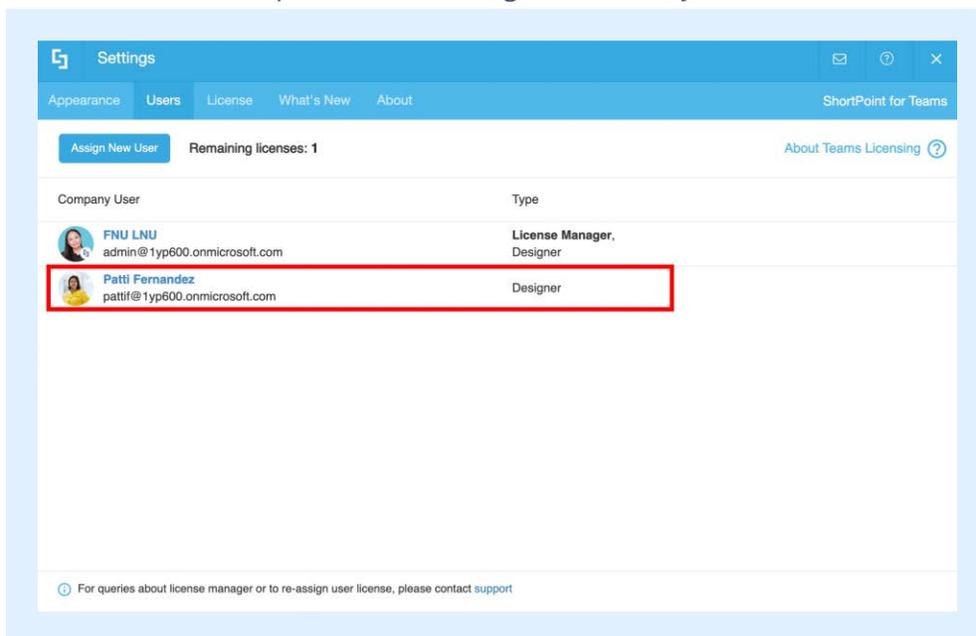


Figure 6.2.5 List of ShortPoint Users

That's it! You now have ShortPoint installed.

Final Remarks.

You have now reached the end of this guide. Thank you for installing ShortPoint for Microsoft Teams.



If you need further assistance, you may reach out to us through the following methods:

-  Email - support@shortpoint.com
-  Knowledge Base - support.shortpoint.com
-  Website - shortpoint.com

Elegant Intranet sites
anyone can design.