



Installation Guide

CoreView 'How-To' Teams App

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Introduction

In this guide, you will see how to install the CoreView 'How-To' App into a Teams tenant so that all users can benefit from CoreView's Just-In-Time Learning™ for Microsoft Teams and all of Office 365. You will also see how to add the app as a tab for channels in Microsoft Teams.

NOTE: Only customers who have a subscription to the full CoreView Just-in-Time Learning solution will be able to complete the steps in this guide.

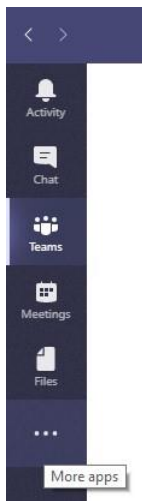
This guide has two sections. The first section steps you through installing the app as an administrator. The second section provides instructions for any Teams user to add the app as a tab for their channels.

To Install the CoreView 'How-To' App into your Teams Tenant

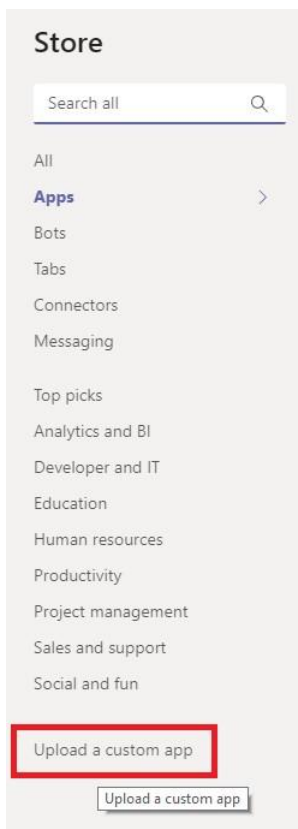
1. Download the [CoreView HowTo For M365.zip](#) file to a location on your local computer
2. Log in to Microsoft Teams with an account that is a Global Administrator in your Office 365 tenant.

NOTE: You can choose whether to use the Desktop App or the Web version of Microsoft Teams – the process is identical for either environment

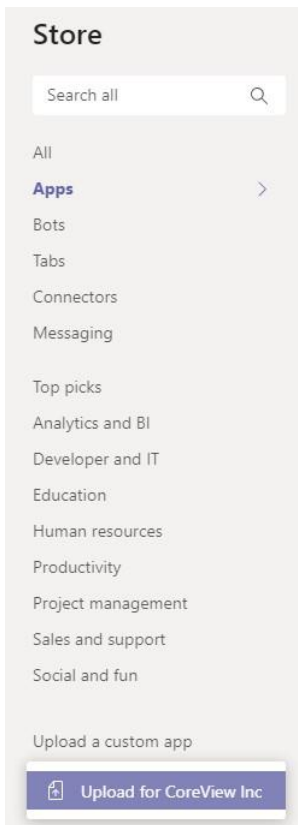
3. In the left navigation pane, click the ellipsis [...] as shown:



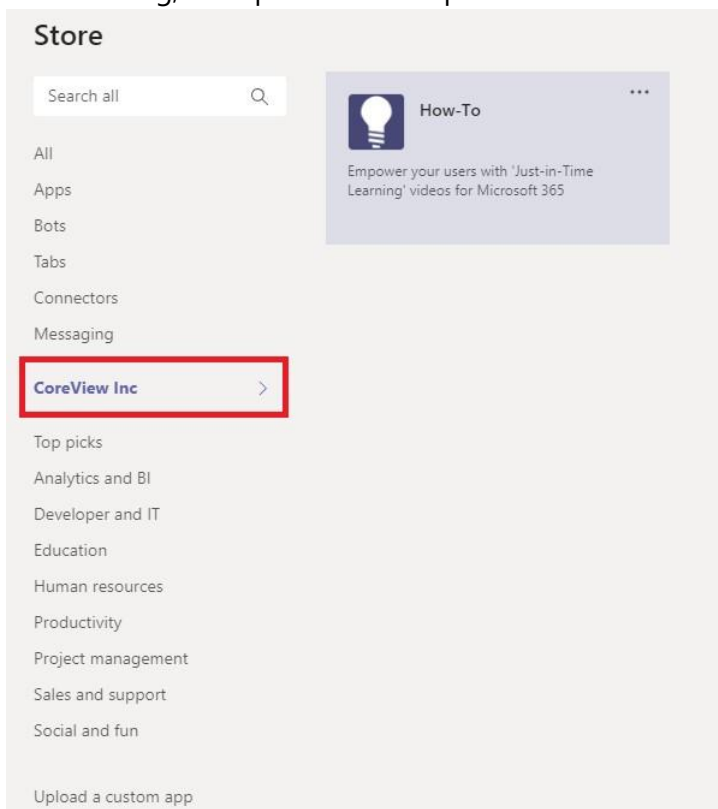
4. In the pop-up, click **Go to store**.
5. Near the bottom of the Store pane, click **Upload a custom app**.



6. In the small pop-up, click **Upload for <Organization>** where <Organization> is the name associated with your Office 365 subscription. For example, the following shows CoreView's own subscription:



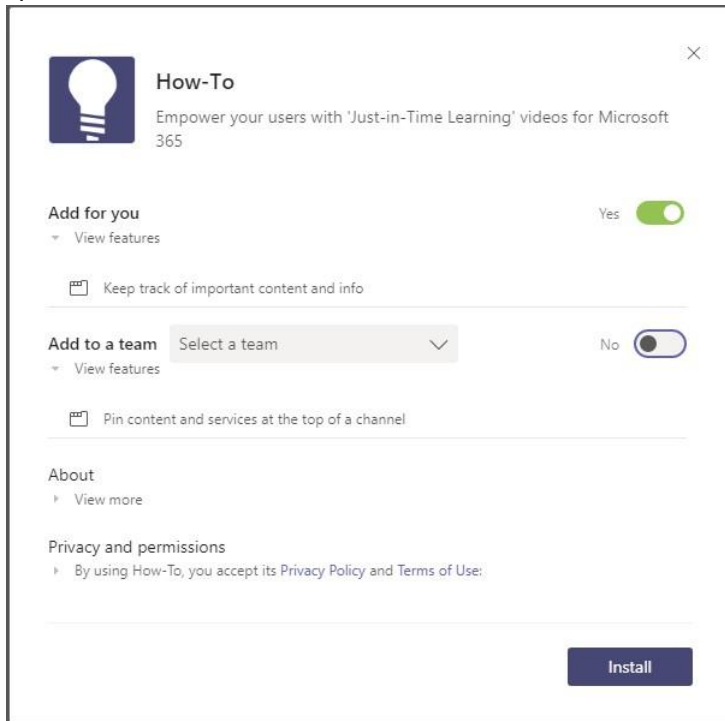
7. In the **Open** dialog box, browse to the **CoreView HowTo For M365.zip** file that you saved to your local computer in step #1. Select the file, and then click **Open**. The upload may take a few seconds to complete. When you see a screen that resembles the following, the upload has completed:



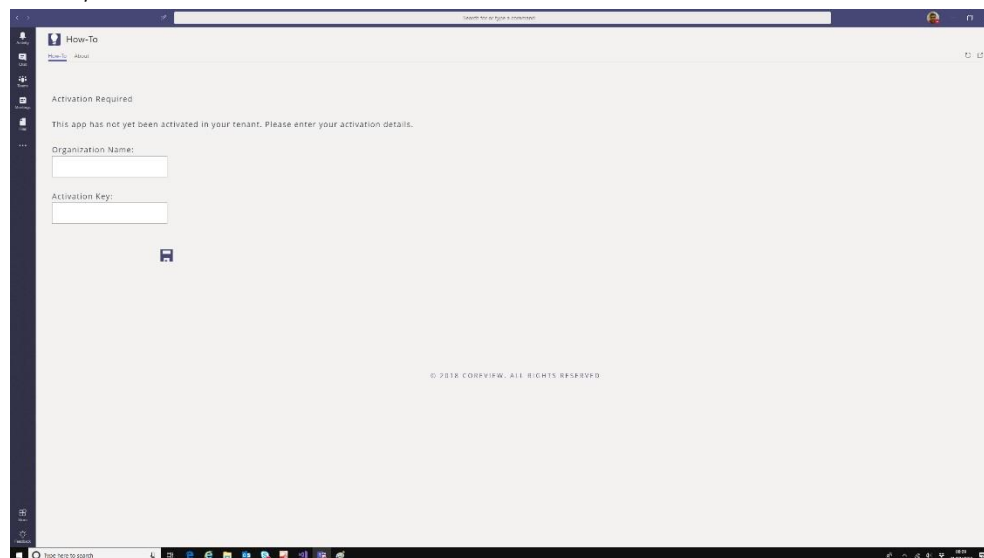
NOTE: The area indicated in red will show your organization's name, rather than CoreView Inc

8. Click the **How-To** item.
Hint: Do **not** click the ellipsis [...]

9. In the pop-up, ensure the **Add for you** option is set to **Yes**, and the **Add to a team** option is set to **No**, as shown:



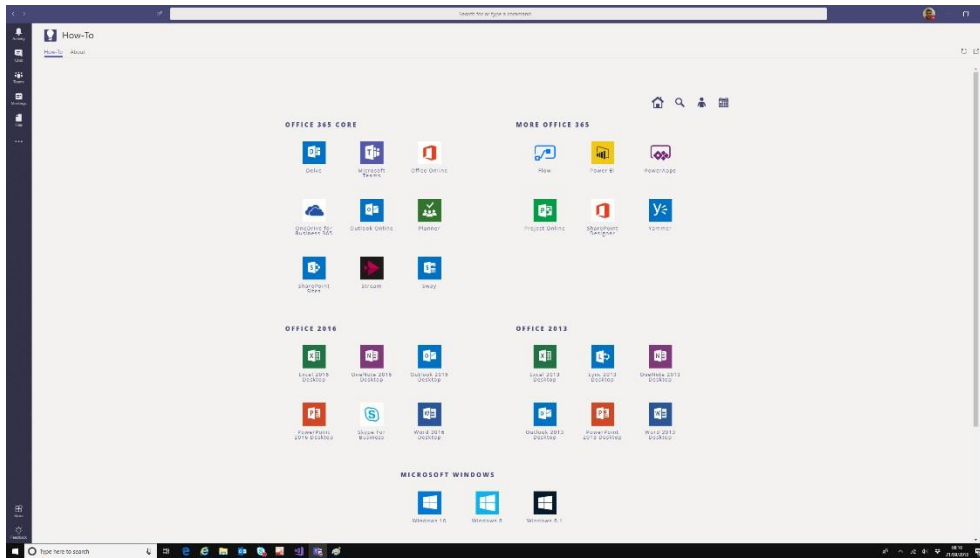
10. Click **Install**.
A new pop-up will appear.
11. In the pop-up, click **Open**.
12. If this is the first time the app has been added to your tenant, you will see an activation screen, as shown:



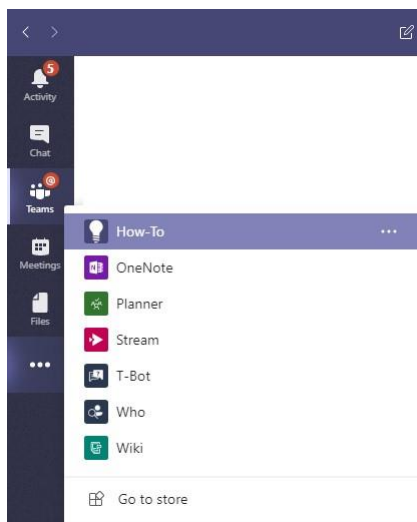
In the **Organization Name** text box and the **Activation Key** text box, type the details that were provided to you by CoreView (or one of our partners).

NOTE: These are the same credentials that you use to activate and administer the CoreView Just-in-Time Learning subscription in other environments. They are required here to ensure all users in your Teams tenant see the training in your specific subscription (including your custom content) and to ensure you have the ability to track users' consumption of training.

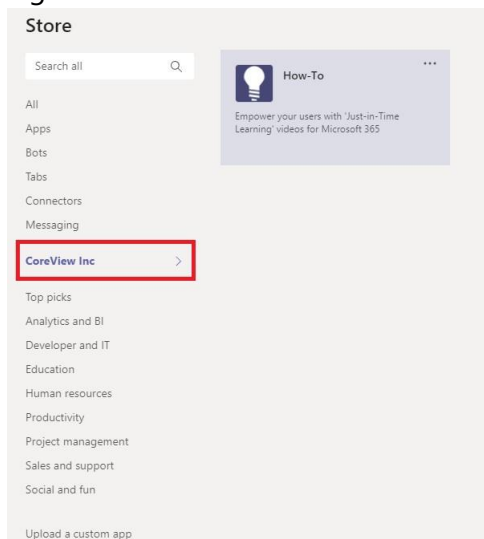
13. Click the **Save** icon.
If you have entered the correct details, you will see the learning page as shown:



14. At any time, you can access the training via the ellipsis in the left navigation pane, as shown:



15. All other users in your tenant will now be able to add the app by clicking the ellipsis [...] in the left navigation pane, and then clicking the section for your organization. For example, the following shows the CoreView organization, but your users will see your organization's name instead:



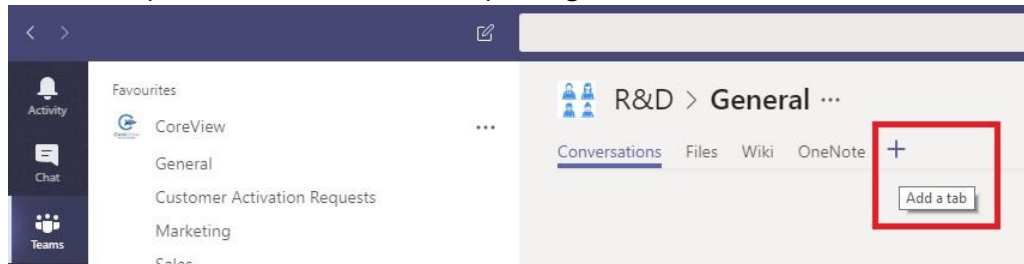
To Add the CoreView 'How-To' Tab to a Channel

You only need to be a member of a channel to perform the following operations.

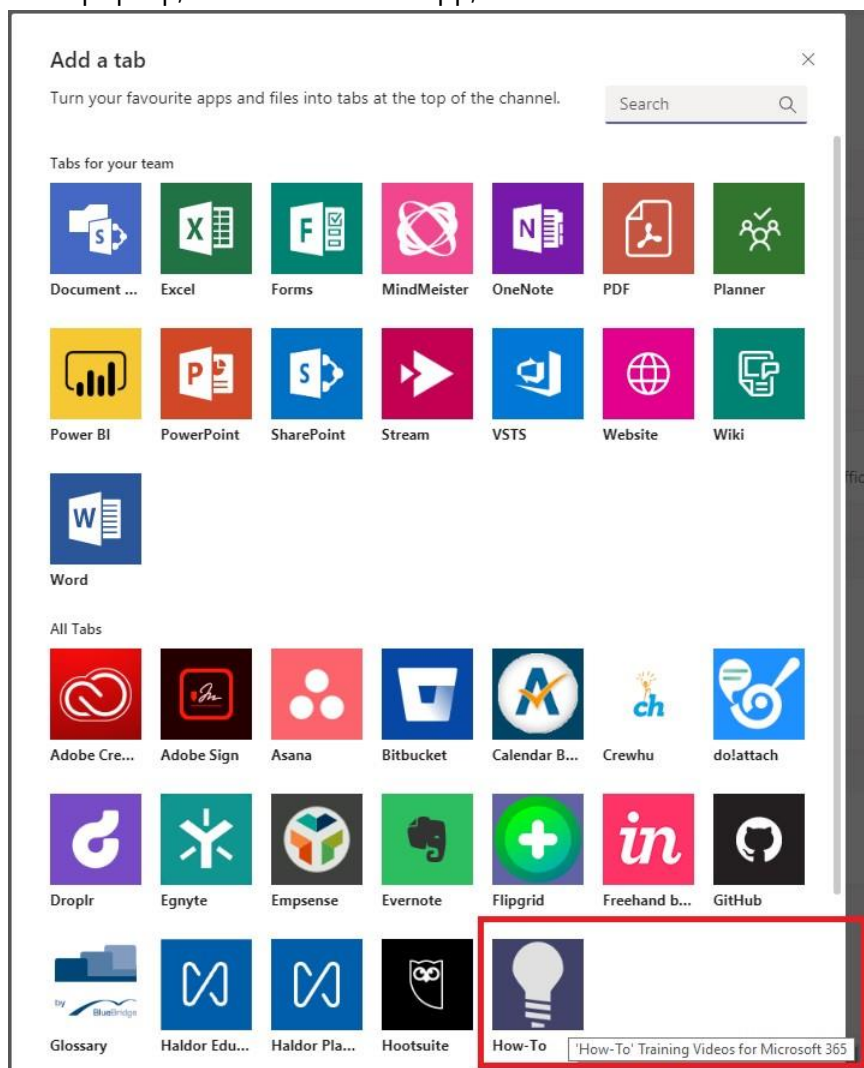
1. Log in to Microsoft Teams.

NOTE: You can choose whether to use the Desktop App or the Web version of Microsoft Teams – the process is identical for either environment

2. Browse to a channel of which you are a member.
3. Near the top of the channel, click the plus sign, as shown:



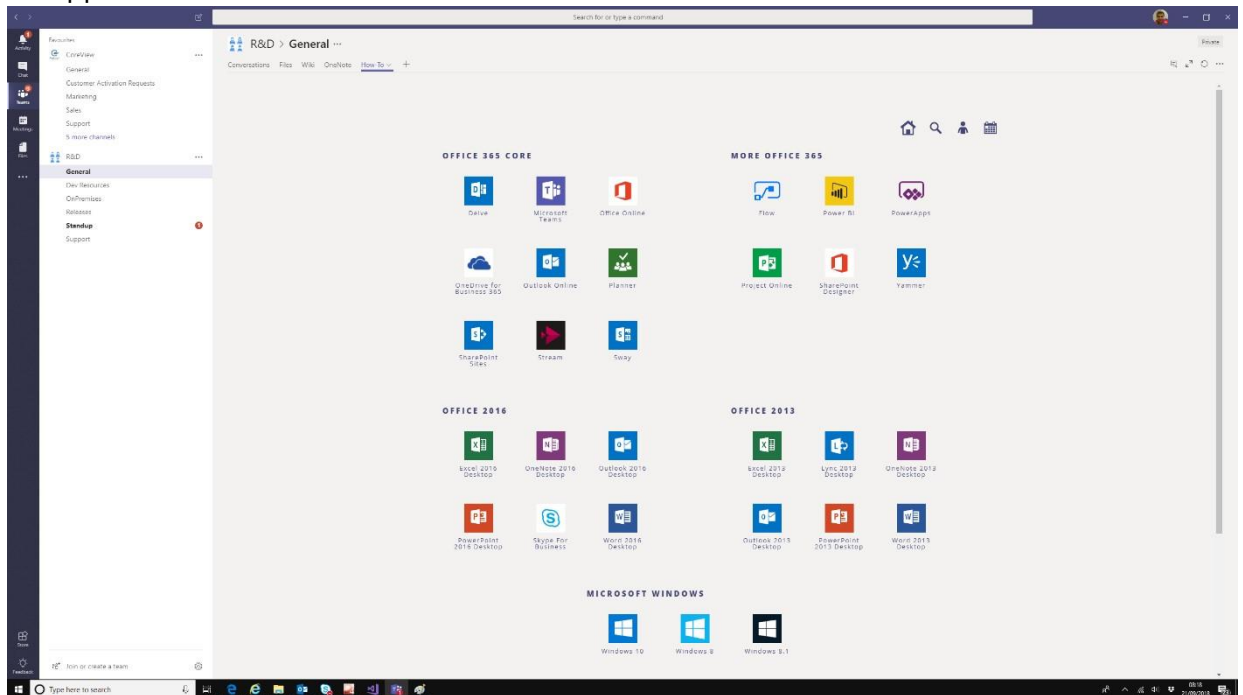
4. In the pop-up, click the **How To** app, as shown:



NOTE: It is likely that you will see different apps to those shown above, and that the How-To app will be in a different position. If you can't locate it easily, you can type **How** into the search box and you will then see the How-To app.

5. In the next pop-up, click **Install**.

- After a second or two, the dialog will change and will display a **Save** button. When that appears, ensure the **Post to the channel about this tab** checkbox is checked and then click **Save**.
- The app will be added as a channel tab, as shown:



NOTE: It will now be easy for channel members to access the training from this tab, even if they have not installed the app or added it to a channel themselves.

- If you wish, you can repeat these steps for any channel of which you are a member.

Feedback and Support

If you have any feedback or need support for installing the Teams App, please feel free to contact support@coreview.com