Microsoft Teams setup guide

Connect Avistrata to Microsoft Teams and Outlook

For IT administrators and Avistrata users · Avistrata 2.2

With the Teams integration, Avistrata can **create and start Teams meetings** from Program Management and Business Development, with invitations sent from the organizer's Outlook calendar. It can also **send alerts to people in Teams**, such as AOG, overdue items, assignments, QC and shared task updates, each with an *Open in Avistrata* button. And you can **chat, call or meet** with your colleagues in Teams from Avistrata.

Setup takes about 15 minutes. Your Microsoft 365 administrator does two one-time steps for the whole organization. After that, each person connects their own account in Avistrata.

IT ADMIN · ONCE	IT ADMIN · ONCE	EACH USER	EACH USER
1. Approve Avistrata	**2. Add the Teams app**	**3. Connect Microsoft 365**	**4. Add the app in Teams**
Grant admin consent in Microsoft Entra ID.	Upload the Avistrata app in the Teams admin center.	In Avistrata, open My Preferences, then Microsoft Teams.	Then choose how alerts arrive.

Before you start

- **Microsoft 365 work or school accounts.** Each person needs a Teams license and an Exchange Online mailbox. Personal Microsoft accounts (outlook.com, hotmail.com) are not supported.
- **An administrator role.** Steps 1 and 2 need a *Global Administrator*, *Privileged Role Administrator* or *Cloud Application Administrator* for consent. Uploading the app needs a *Teams Administrator*.
- **Avistrata sign-in.** People's email address in Avistrata should match their Microsoft 365 address. This lets Avistrata match them to their Teams account automatically.

1 Approve Avistrata for your organization IT ADMIN

Avistrata asks Microsoft for a small set of *delegated* permissions. It acts only as the signed-in person and only for things that person starts. Your organization approves these once, so users aren't stopped by a "Need admin approval" message.

1. Sign in to a browser as a Microsoft 365 administrator.
2. Open this link:
   `https://login.mrotracker.com/teams/admin-consent`
3. Review the permissions Microsoft lists for **Avistrata** (the table below explains each one), then click **Accept**.
4. You return to Avistrata with the message "*Avistrata is approved for your organization.*" If you aren't an Avistrata user, you'll see the sign-in page instead. Consent is already recorded either way.

> **Another way:** an administrator who also uses Avistrata can click **Connect Microsoft 365** in step 3. On Microsoft's consent screen, tick **Consent on behalf of your organization** before clicking Accept. The result is the same.

Permission (Microsoft Graph, delegated)	**Why** Avistrata needs it
User.Read	Sign in and read the person's name and email, so their Microsoft account can be matched to their Avistrata user.
Calendars.ReadWrite	Create, update and cancel the Outlook calendar event for a meeting scheduled in Avistrata. This is what sends the invitations. Avistrata changes only the events it created.
OnlineMeetings.ReadWrite	Make that event a Teams meeting with a join link, including "start now" meetings.
offline_access	Keep the connection between sessions, so a meeting can be created without signing in to Microsoft every time.
openid, profile, email	Standard sign-in permissions.

Avistrata does not ask for application-wide (daemon) permissions. It cannot read mail, files, chats or other people's calendars.

2 Add the Avistrata app to Teams

TEAMS ADMIN

The Teams app is how Avistrata alerts reach people in Teams. Your organization installs it as a custom app.

Download the app package

1. Sign in to Avistrata at `https://login.mrotracker.com`.
2. Open **My Preferences** and scroll to **Microsoft Teams**.
3. Under *For IT admins*, click **download the MRO Tracker Teams app**. This saves `MRO-Tracker-Teams-app.zip`. Don't unzip it.

If the person uploading the app has no Avistrata login, a colleague can download the file and send it to them.

Upload it in the Teams admin center

1. Go to `https://admin.teams.microsoft.com` and open **Teams apps → Manage apps**.
2. Click **Actions → Upload new app** (in some tenants it's **+ Upload new app**), then **Upload**, and choose the zip file.
3. Find **Avistrata** in the list and make sure its status is **Allowed**.
4. Check that custom apps are allowed: in **Manage apps**, open **Org-wide app settings** (or **Actions → Org-wide app settings**) and confirm *Let users interact with custom apps* is on. If you use app permission policies or app-centric management, make sure the people who use Avistrata are allowed to use it.

> **Optional: install it for everyone.** In **Teams apps → Setup policies**, edit the policy your users have, add **Avistrata** under I*nstalled apps* and, if you like, under *Pinned apps*. People then get the app without adding it themselves. Policy changes can take a few hours to reach everyone.

3 Connect Microsoft 365 EACH USER

Each person who wants to create Teams meetings from Avistrata does this once.

1. In Avistrata, open **My Preferences → Microsoft Teams**.
2. Click **Connect Microsoft 365** and sign in with your work account.
3. You come back to Avistrata, which shows "*Microsoft* **365** *connected as you@yourcompany.com*."

To stop, click **Disconnect** in the same place. Avistrata deletes its stored access to your Microsoft account right away.

4 Add the app in Teams and choose your alerts EACH USER

1. In Teams, click **Apps**, then **Built for your org** (some versions call it *Built for [your company]*). Open **Avistrata** and click **Add**. If your admin installed it for everyone, it's already there.
2. Avistrata sends a welcome message in a chat with the app. From then on, your alerts arrive there as cards with an **Open in Avistrata** button.
3. Choose how you receive alerts in Avistrata under **My Preferences → My Info**:
   - **Email, text or both**: alerts also show up in Teams as long as Teams alerts are on.
   - **Microsoft Teams only (email if Teams can't reach me)**: alerts go to Teams only, with email as the backup so nothing is missed.

Type this in the Avistrata chat	What it does
help	Shows what Avistrata does in Teams.
stop	Pauses Avistrata alerts in Teams. You still get them the way you chose in My Info.
start	Turns Teams alerts back on.

You can also pause or resume alerts with the switch under **My Preferences → Microsoft Teams**.

Creating Teams meetings from Avistrata

Program Management

Meetings in **Program Management** (Programs → a program → *Meetings*) come with Teams buttons once you've connected Microsoft 365.

1. Open a Program Management meeting, or create one, and enter the title, date and time, length, attendees and agenda.
2. Click one of these:
   - **Create Teams meeting**: schedules it for the date and time you entered.

- **Start Teams meeting now**: starts it immediately and opens Teams.

3. Avistrata adds the meeting to **your** Outlook calendar, and Outlook sends the invitations to the attendees. The join link is saved in the meeting's *Call or link* field, and a **Join Teams meeting** button appears.
4. If you change the time, title or attendees and save, the Outlook event and invitations are updated. If you delete the meeting, it is cancelled in Outlook and attendees are notified.

Business Development

1. On a lead, opportunity or account, click **Log activity** and set *Type* to **Meeting** or **Demo**. A *Teams meeting* box appears.
2. Pick the contact, set *When* and the length, and add anyone else under *Also invite* (colleagues or outside people, by email).
3. Click **Save and create Teams meeting**, or **Start Teams meeting now**. The contact and everyone you added get the invitation from your Outlook calendar, and the activity is saved on the timeline with a **Join Teams meeting** button.
4. On the timeline, the organizer can **Reschedule** (attendees get the updated invitation) or **Cancel meeting** (attendees get a cancellation; the activity stays, marked cancelled).

> **Good to know:** the person who creates the meeting is its organizer in Teams and Outlook, and only they can change or cancel it from Avistrata. If someone else edits a Program Management meeting, Avistrata tells them whom to ask. External attendees get a standard Teams invitation and can join from a browser, depending on your organization's Teams meeting policies.

Chat, call or meet with Avistrata users

Once you've connected Microsoft 365 or added the Avistrata app in Teams, a **people** button appears at the top of Avistrata, next to My Preferences. It is also in **My Preferences → Microsoft Teams** (*Chat or meet in Teams with Avistrata users*).

1. Click it and pick one or more people from your organization in Avistrata. Use the search box to find them.
2. Click **Chat** to open a Teams chat with them (with your message filled in, if you typed one), **Call** or **Video call** to call them in Teams, or **Meet now** to start a Teams meeting that sends them an invitation.

Chat and calls open in the Teams app or Teams on the web. People in another Microsoft 365 organization can be reached when both organizations allow external access in Teams.

Troubleshooting

What you see	What to do
"Need admin approval" or "Your organization's Microsoft 365 admin needs to approve Avistrata first"	Step 1 hasn't been done for your organization. Ask your IT admin to open the admin consent link.

What you see	What to do
Avistrata isn't in Teams under Built for your org	Step 2 hasn't been done, the app is blocked, or a permission policy hides it. Ask your Teams admin to check *Manage apps* and your app policies.
"Connect your Microsoft 365 account first?" when creating a meeting	Do step 3, then try again. You'll also see this after you disconnect, or if your organization revokes Avistrata's access.
No alerts in Teams	Check that you added the app in Teams (step 4), that you haven't typed *stop*, and that Teams alerts are on in My Preferences. Your Avistrata email has to match your Microsoft 365 address. If it doesn't, connect Microsoft 365 (step 3) and Avistrata links your accounts.
"Microsoft 365 connected", but with a *Last problem* note	Usually your Microsoft password changed or your access expired. Click **Disconnect**, then **Connect Microsoft 365** again.
Personal Microsoft account refused	Use your work or school account. Personal accounts can't host Teams meetings for an organization.

Security and data

- **Least privilege.** Avistrata uses delegated permissions only, and acts only for the person who connected.
- **Encrypted tokens.** Microsoft access tokens are encrypted before storage and never sent to the browser. Disconnecting deletes them.
- **What goes to Microsoft.** For meetings: the title, time, attendee addresses and agenda you enter. For Teams alerts: the alert's subject, a short summary and a link back to Avistrata. Records stay in Avistrata, so people open the link and sign in to see details.
- **Verified messages.** Avistrata checks the signature on every message Microsoft Teams sends it, so nothing else can pose as Teams.
- **Removing access.** An administrator can remove Avistrata at any time in the Microsoft Entra admin center: *Enterprise applications → Avistrata → Properties → Delete*. Block or remove the app in the Teams admin center as well.

Reference	
Application name	Avistrata
Application (client) ID	`a21b50b9-3db2-4ac5-84fc-eb223571cc69`
Publisher	Leesburg Aviation LLC
Sign-in reply address	`https://login.mrotracker.com/.netlify/functions/ms-callback`
Admin consent link	`https://login.mrotracker.com/teams/admin-consent`

Need help? Email **support@avistrata.com** and we'll walk your IT team through the setup. · www.mrotracker.com