



Creately for Microsoft Teams

Deployment guide

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1. Introduction

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

1.1 Overview of Creately in Teams

- Application description

Creately is a work management platform that runs on a smart visual canvas. Teams use it to brainstorm, plan, manage projects, and capture knowledge in a single space. It connects and centralizes work items from multiple apps, docs, and people in a central location. This makes it easier for teams to ideate, map out processes, add in-depth details, and build the systems to execute the processes right inside Creately.

Creately combines visual collaboration and diagramming, workflow and project management, wiki and note-taking together to provide a no-code environment where users can build and model their own operating system for work.

Creately is trusted by over 8 million users and is used by teams at leading organizations including Netflix, Amazon, NASA, Disney, and PayPal.

- Key benefits

Infinite space to visually create and organize any structure.

Create custom databases for any kind of information from tasks, HR personnel records to matters for law firms.

Work remote or hybrid with real-time cursor tracking, in-built video chat and proper in-context comments and tasks.

Create docs and notes to go deeper from the high-level visual views. Two-way link to other docs, shapes or data with @mentions.

Built-in agile project management tools and integrations to popular project management systems.

1000+ specially-designed shapes and connectors for intuitive diagramming.

Visuals that are backed by databases, update once, reflect in multiple view types of workflows.

Every change is recorded separately. Name versions in history to keep track of key points in the evolution of the workspace. Branch out from an earlier version if needed.

- Features

- Visual Workspaces
- Custom Databases
- Task Management
- Multi-player Collaboration
- Wiki & Notes
- Modeling and Diagramming

2. Deployment guidance for Microsoft 365 administrators

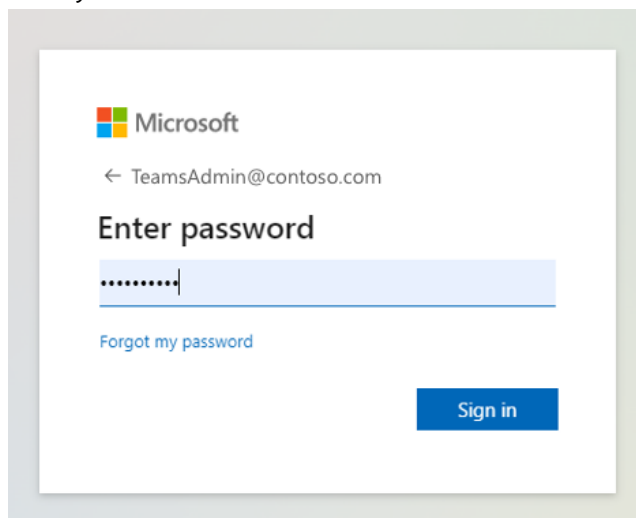
2.1 Prerequisites

Prior to deploying Creately in Microsoft Teams, ensure that you have:

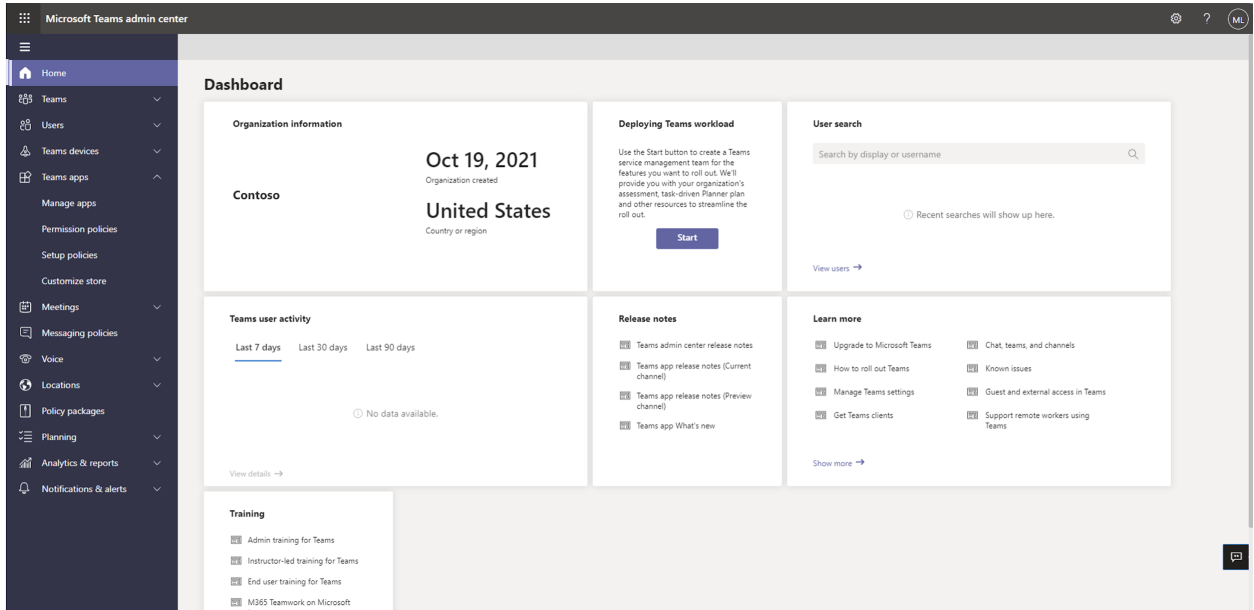
- An active Microsoft 365 subscription
- Access to a Microsoft 365 administrator account
- Activated Microsoft Teams for your organization

2.2 Sign into the Microsoft Teams admin center

1. Go to <https://admin.teams.microsoft.com/>
2. Enter your administrator credentials

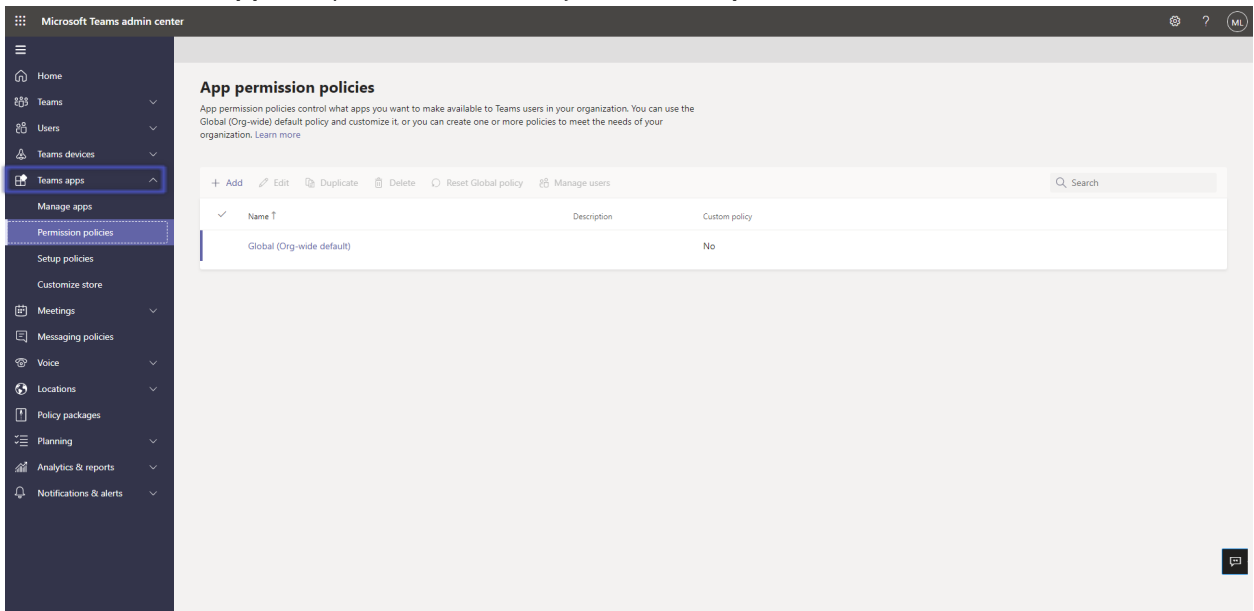


3. Access the Teams admin center dashboard.

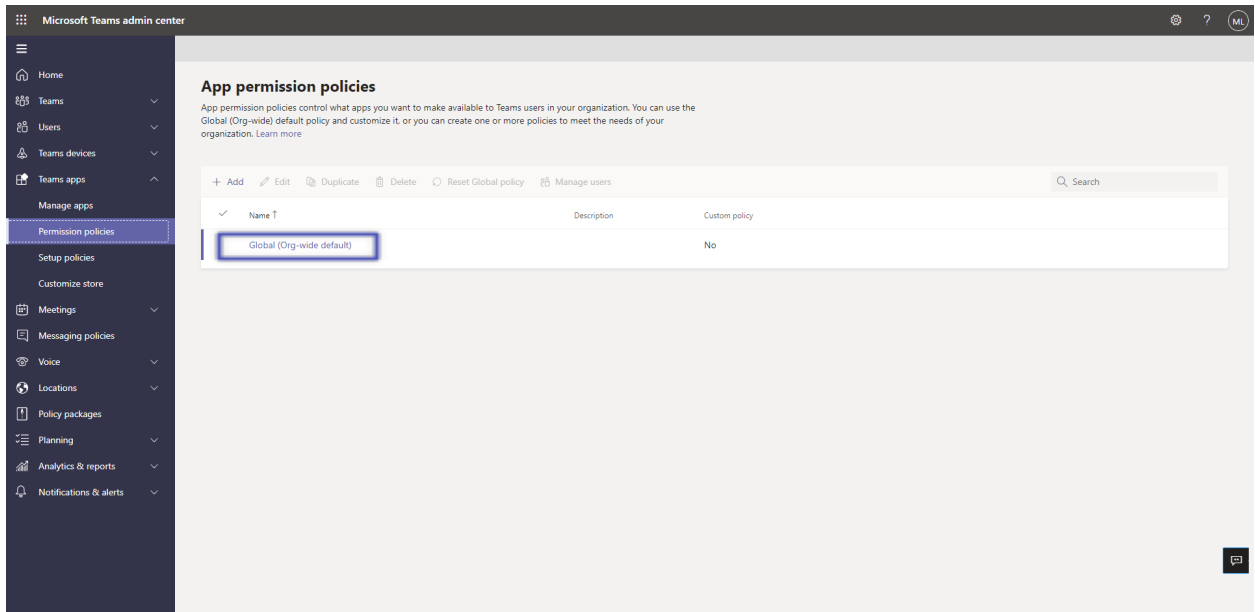


2.3 Set Global (org-wide) app permission policies

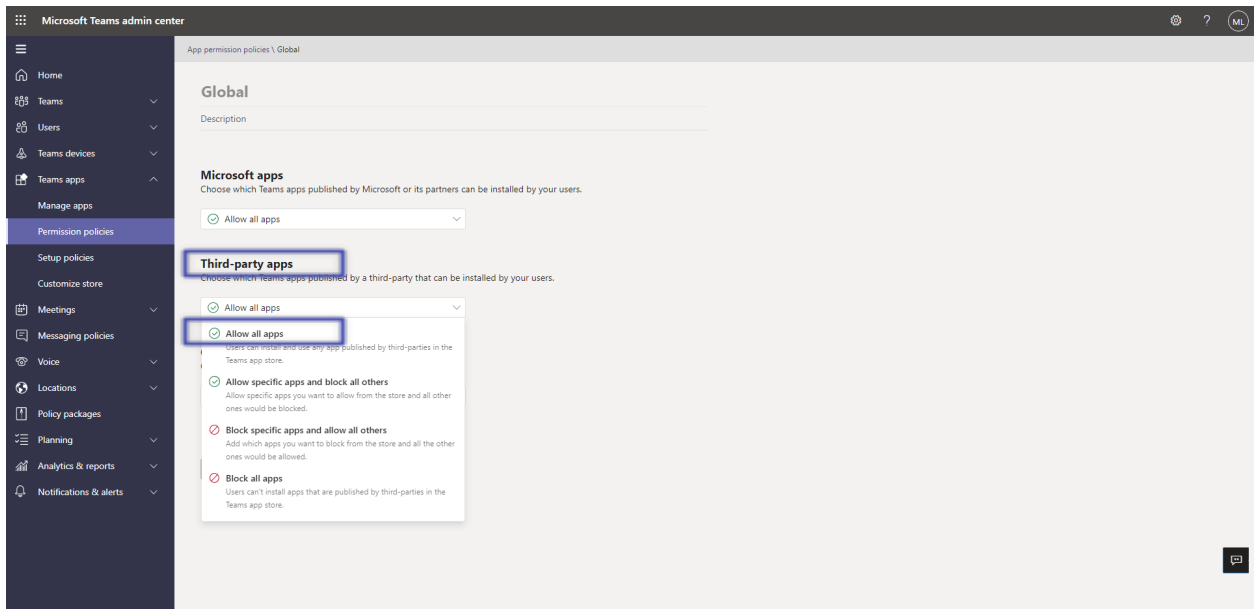
4. Select the **Teams apps** dropdown followed by **Permission policies**.



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 Creately to add it to the list of approved apps.



2.4 Activate Creately in Teams

7. Select **Manage apps** and search for Creately

Microsoft Teams admin center

Manage apps

When you are managing apps for your organization, you are controlling what apps are available to users in your organization's app store. You can then use app permission and app setup policies to configure what apps will be available for specific users. [Learn more](#)

Pending approval

0 Submitted custom apps 0 Updated custom apps

Org-wide app settings

Search by name

Name	Certification	Publisher	Publishing status	Status	Licenses	Custom app	Permissions
1-on-1 Hub	--	Appluence Inc	--	Allowed	--	No	View details
10xGoals	Publisher attestation	xto10x Technologies	--	Allowed	--	No	View details
15Five	--	15Five, Inc.	--	Allowed	--	No	--
360 Tours	--	Apthings	--	Allowed	--	No	View details
365-QA	Publisher attestation	Advantive	--	Allowed	--	No	--
365Projects	Publisher attestation	365Apps	--	Allowed	--	No	View details
7Geese	--	7Geese	--	Allowed	--	No	--
8x8	Publisher attestation	8x8, Inc	--	Allowed	--	No	--

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

Microsoft Teams admin center

Manage apps

Control which apps are available to users in your organization by allowing and blocking apps. You can also upload and approve custom apps. After managing apps on this page, you can use app permission and app setup policies to configure what apps are available for specific users in your organization's app store. [Learn more](#)

Pending approval

0 Submitted custom apps 0 Updated custom apps

Featured app [VIEW DETAILS](#)

MyHub
Enable your organization to create and manage M365 workspaces in one place.

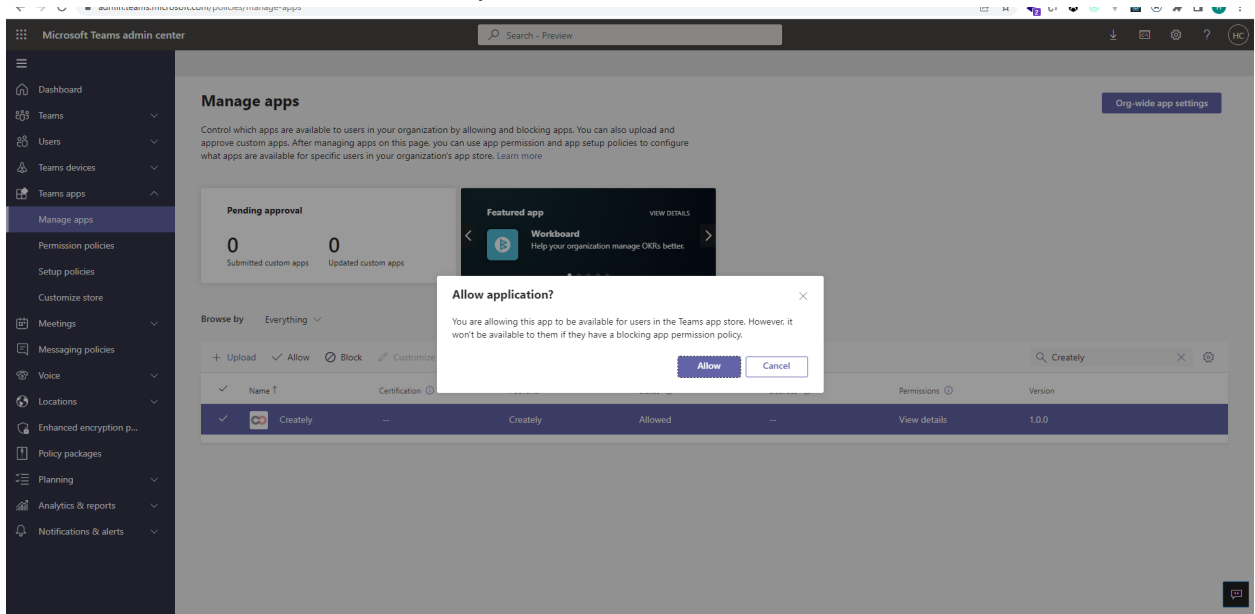
Browse by Everything

1 item selected

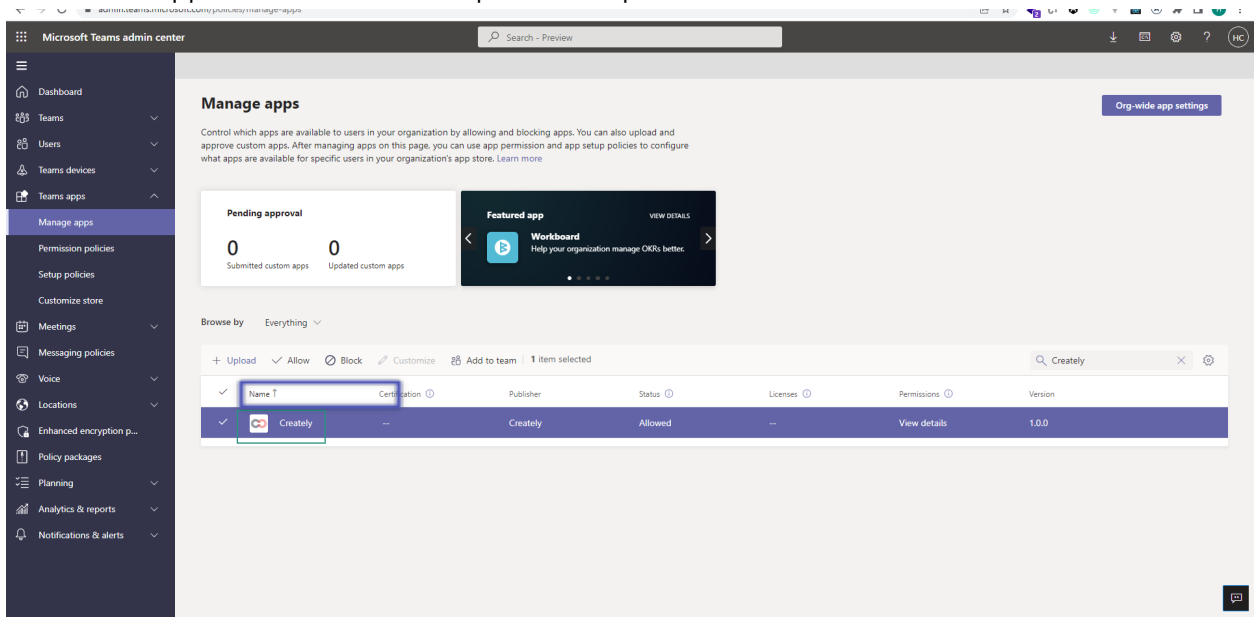
Search: Creately

Name	Certification	Publisher	Status	Licenses	Permissions	Version
<input checked="" type="checkbox"/> Creately	--	Creately	Allowed	--	View details	1.0.0

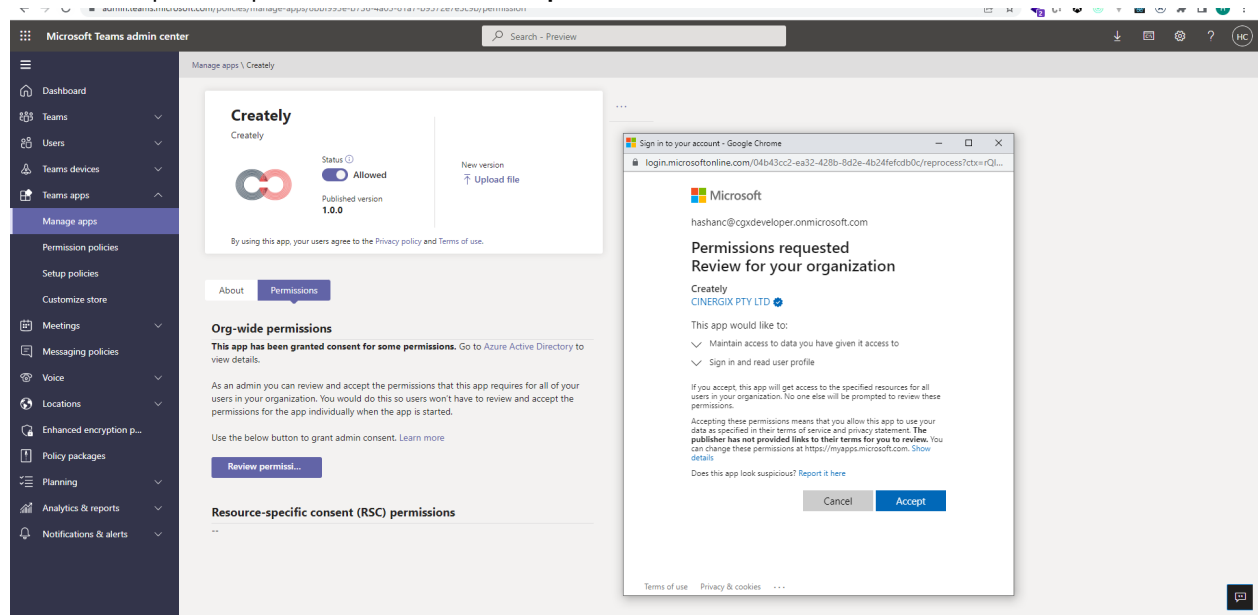
9. Click **Allow** to let users access Creately in Teams.



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.

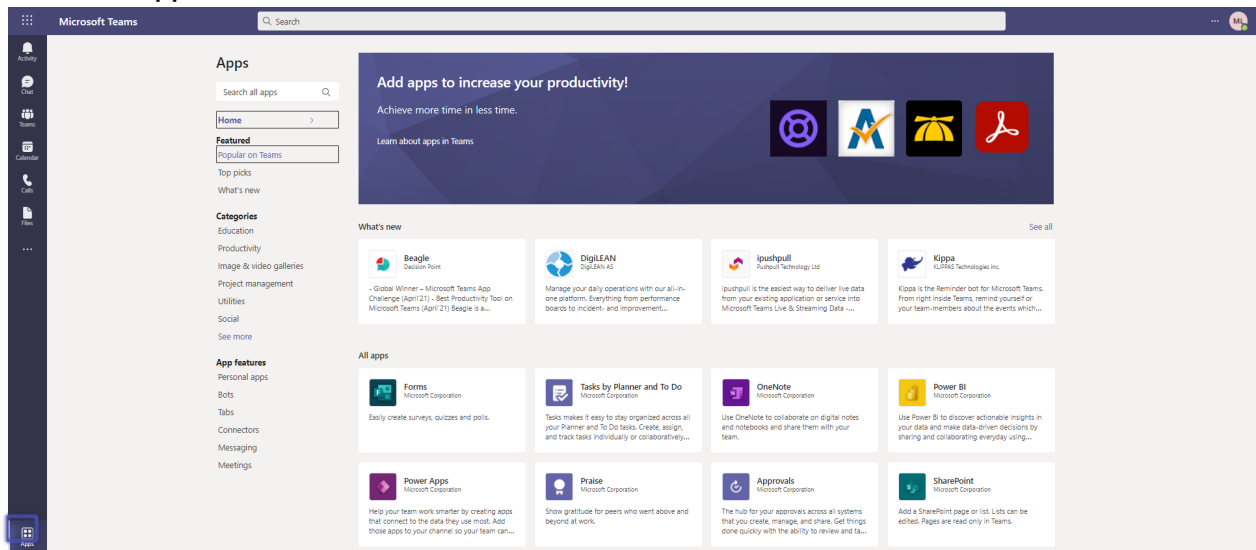
3. Deployment guidance for Teams users

3.1 Prerequisites

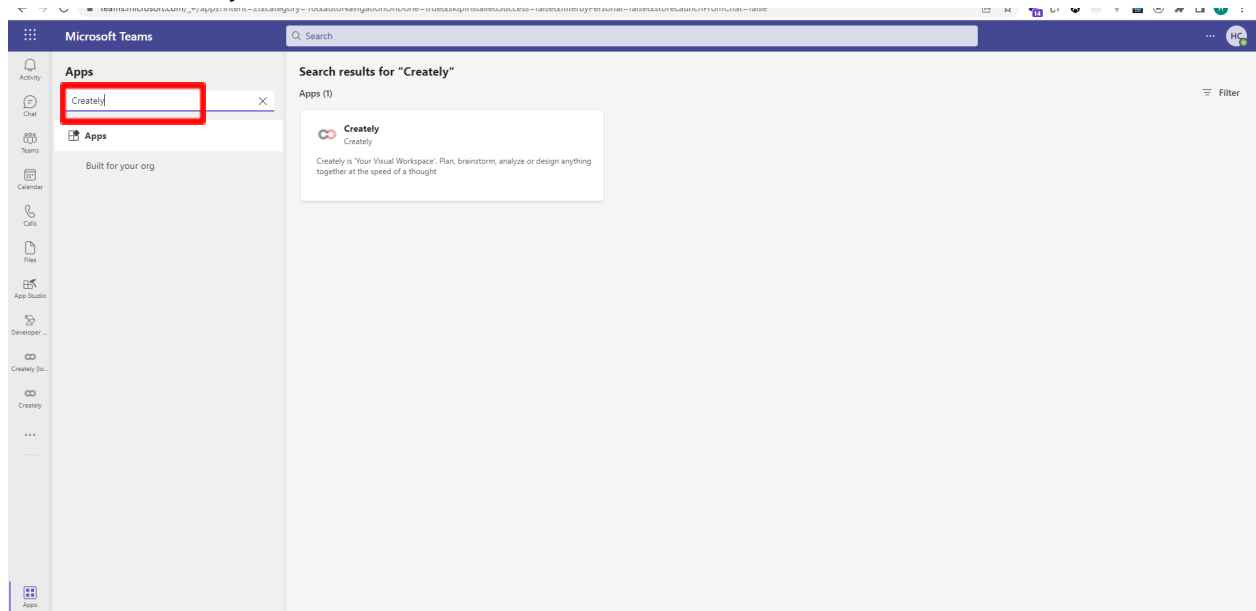
- Active Teams account

3.2 Add Creately to Teams

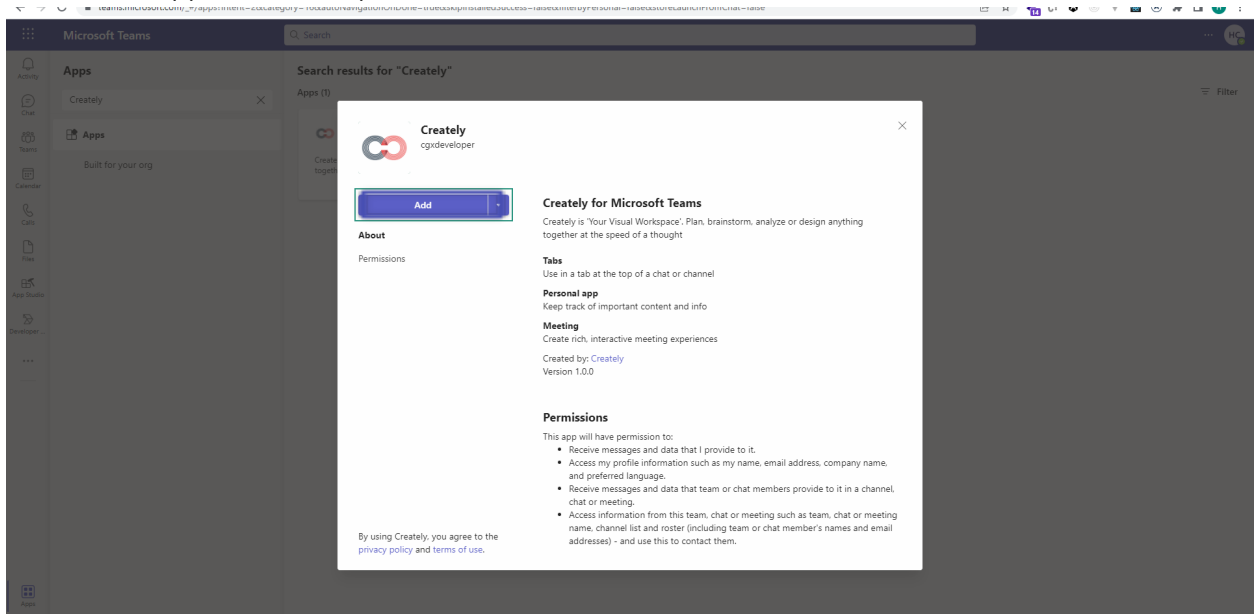
1. Open Teams and sign in.
2. Select the **Apps** icon on the left rail of the Teams window.



3. Search for Creately



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

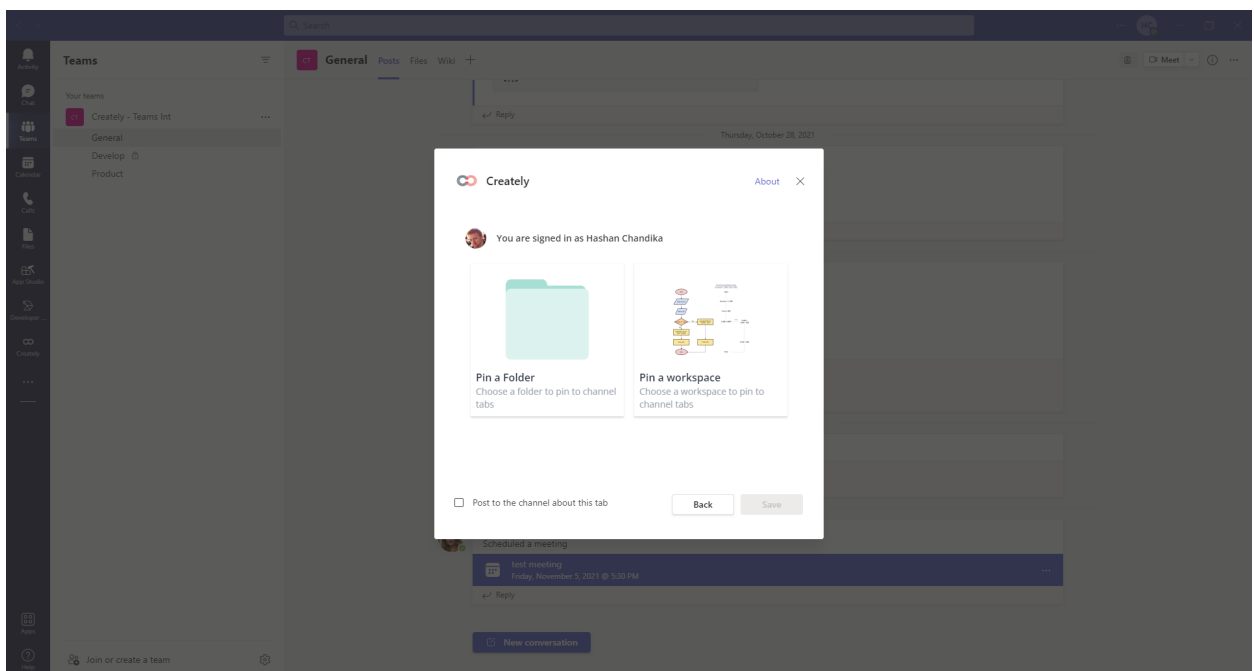


3.3 Sign into Creately

5. If necessary, list steps and include screenshots for signing into the application and getting started

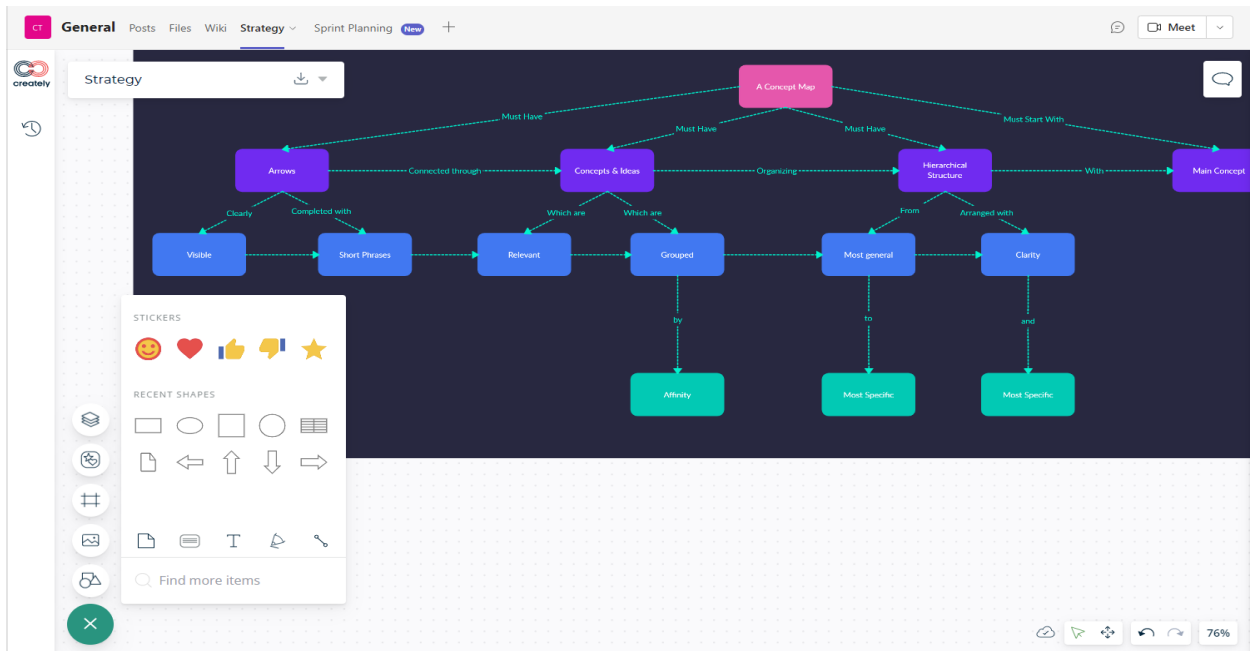
3.4 Start using Creately

6. Pin a folder



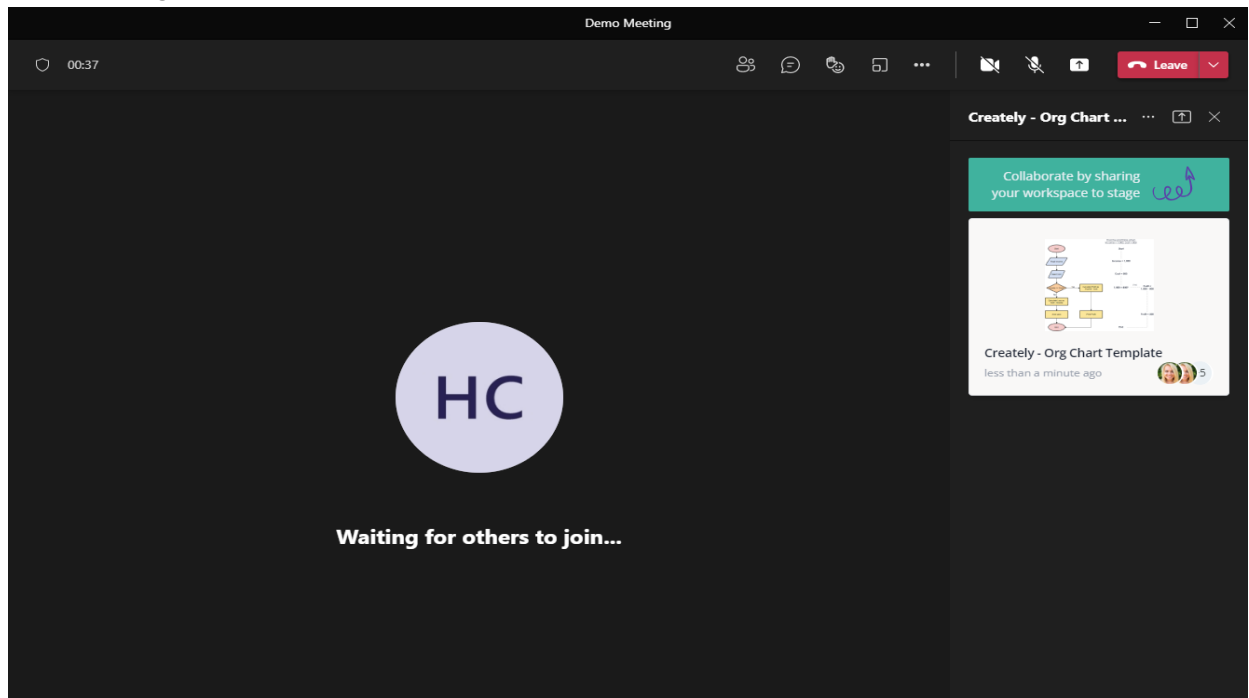
- a. Go to any chat or channel and click on “+” icon on the navigation bar.
- b. Select Creately from the app menu.
- c. You can either pin a folder or workspace

7. Edit Creately workspaces in MS Teams



- a. Once you have pinned a folder or workspace from Creately, it will appear on the navigation bar.
- b. To rename the tab, simply click on the “drop down” icon next to the name of the tab and click “Rename.”
- c. Type a name of your preference.
- d. Team members in Microsoft Teams will be able to access and edit the folder or workspace based on the access permissions allowed on Creately app.

8. Share to Stage



- a. When in a live meeting, click on the “+” button on the top right corner to add Creately as an app.
- b. Click on the drop down menu and select “Add an App” to add Creately as an app to a meeting.
- c. Once you have added Creately, click on “Share to Stage” on the right sidebar to present a workspace to a meeting.

3.5 Additional resources

9. Include links to additional resources, best practices, and tips
 - a. Click [here to read more on how to set up Creately in MS Teams](#)