



Engagy Tasks User Guide

Prerequisites

- The user has the Engagy Comms Management Hub license – steps listed in *Purchase Engagy Comms Management Hub license*.
- The user is a Global Administrator, required to consent to application permissions.

Get Familiar with the Solution

The Engagy Tasks application is a productivity-boosting tool that allows you to manage your tasks related to the company's intranet.

Engagy Tasks helps you with portal expansion control by allowing you to approve or decline requests for creating new intranet areas.

It enables you to regularly access selected intranet areas and mark tasks as completed, ensuring the security and accuracy of the access.

Engagy Tasks offers an easy way to complete tasks related to preparing new areas of the intranet ensuring its quality.

Demo the Solution

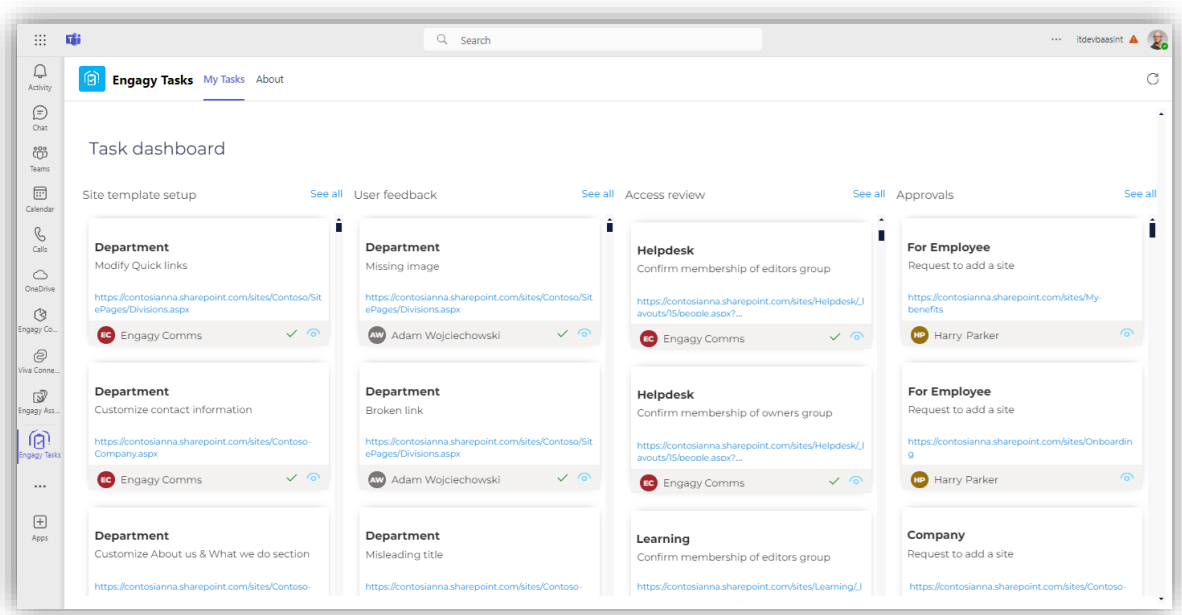


Figure 1. Main view

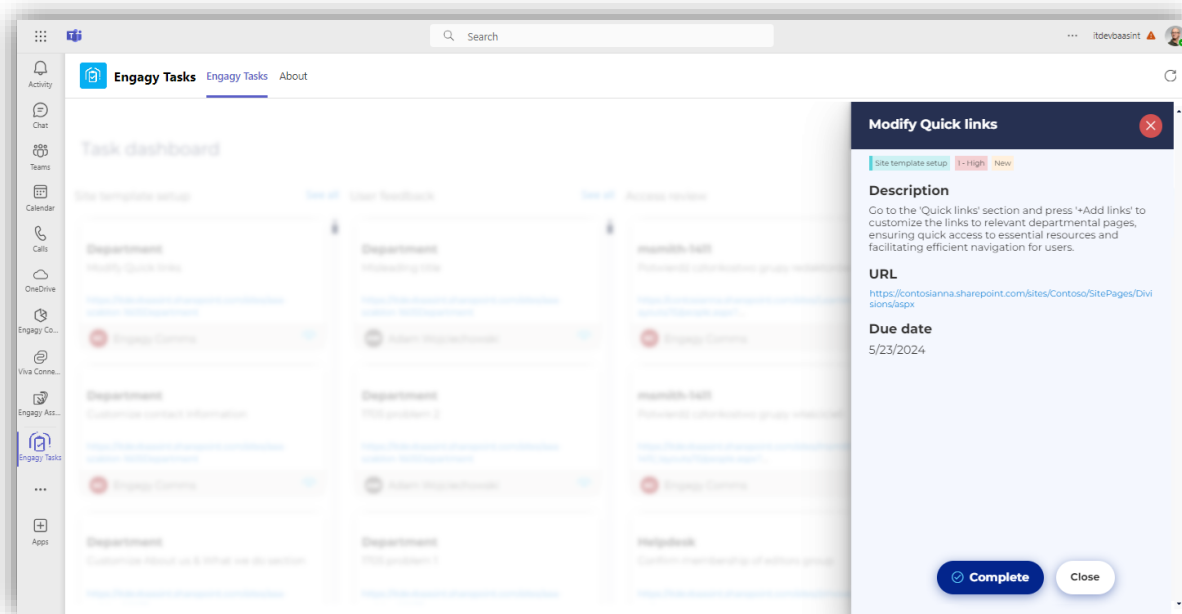


Figure 2. Task preview

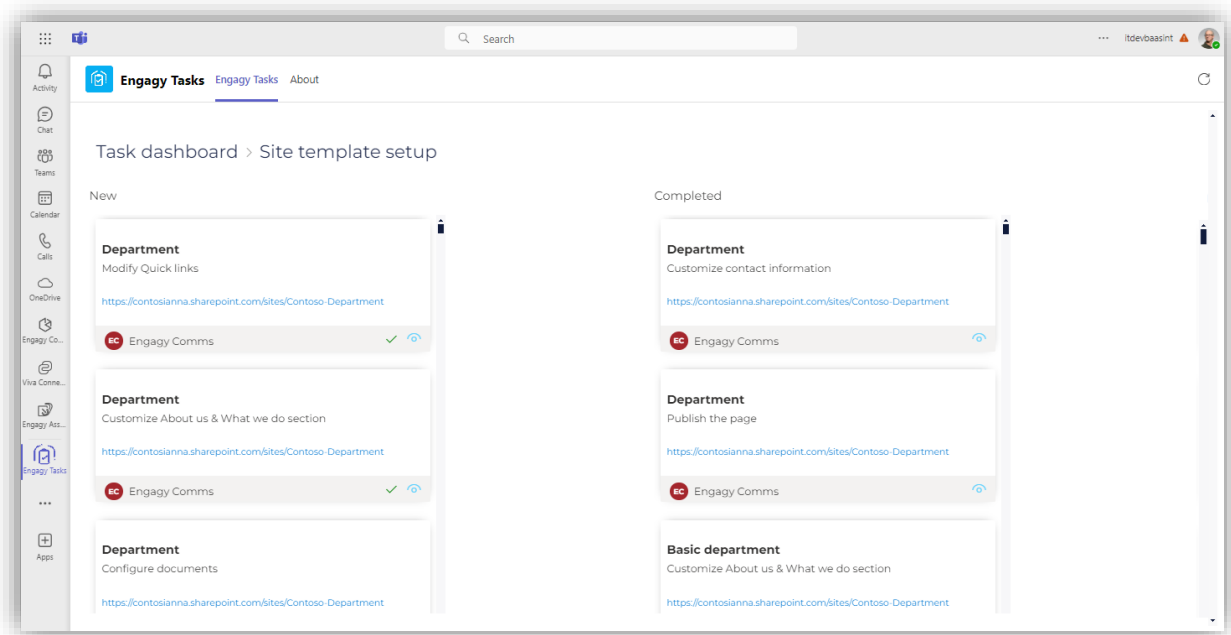


Figure 3. New and completed tasks

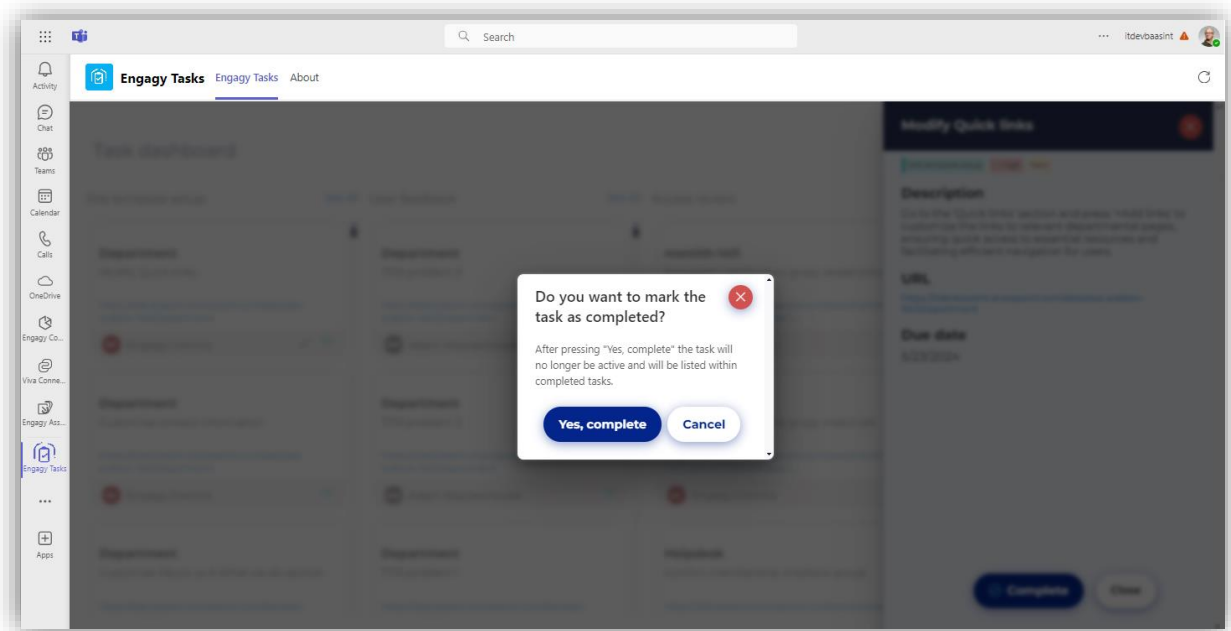
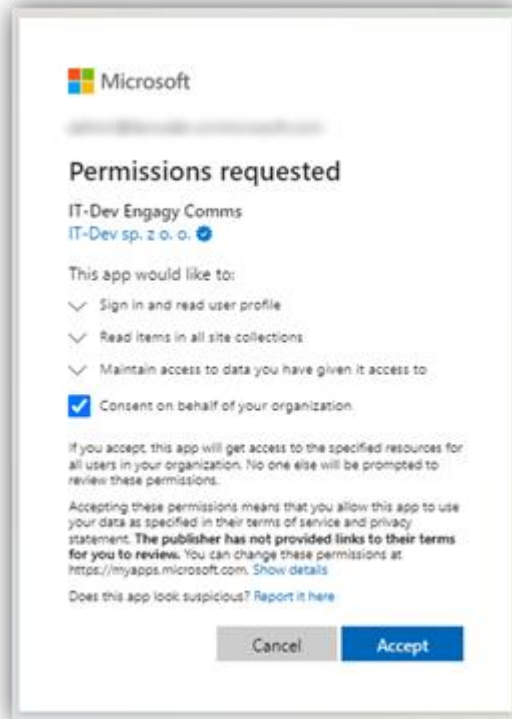


Figure 4. Completing the task

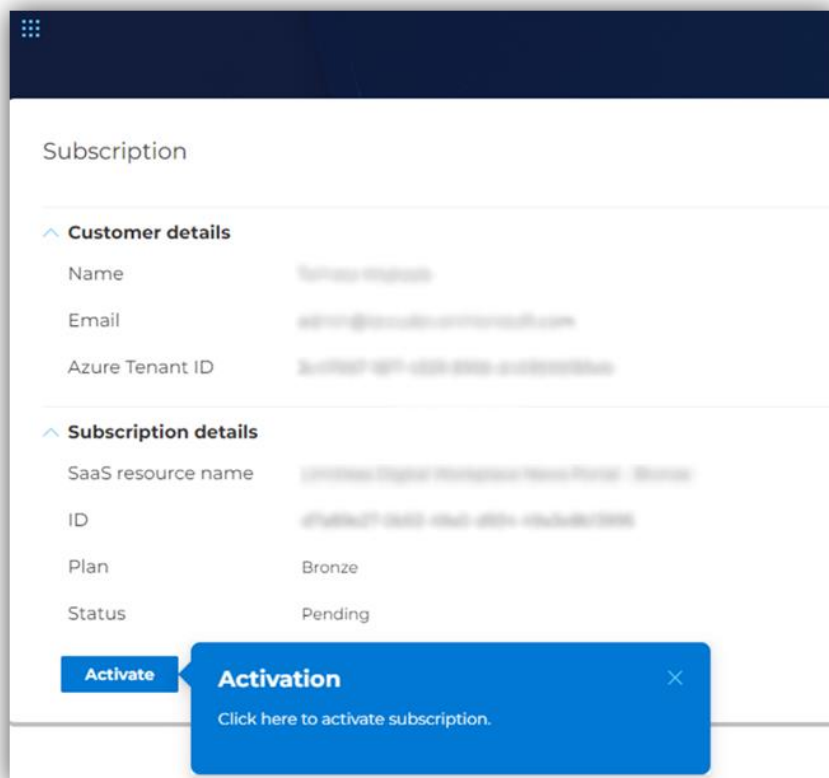
Deploy & Adopt for IT Admins

1. Guidance for Configuration Steps:

- **Purchase Engage Comms Management Hub license**
 - Go to Azure Marketplace or AppSource portal and Engage Comms Management Hub.
 - Configure your subscription.
 - Accept required permissions by pressing *Accept* button.



- o Activate your subscription by pressing *Activate* button.



- o Press *Go to service* button.

The screenshot displays a 'Subscription' page with the following details:

- Customer details:**
 - Name: Service Hub
 - Email: admin@servicehub.com
 - Azure Tenant ID: 2c7d1d1f-1111-1111-1111-111111111111
- Subscription details:**
 - SaaS resource name: Service Hub (SaaS Resource Name) - 12345
 - ID: 2c7d1d1f-1111-1111-1111-111111111111
 - Plan: Bronze
 - Status: Active

A blue notification banner at the bottom contains the text 'Subscription activated!' and a 'Go to service' button. Below the banner, it says 'Click here to start using [Service Hub](#)'.

- o Accept required permissions by pressing *Accept* button.



Permissions requested

Review for your organization

IT-Dev Engagy Comms

IT-Dev sp. z o. o. 

This app would like to:

- ✓ Read all groups
- ✓ Read items in all site collections
- ✓ Sign in and read user profile
- ✓ Read all users' full profiles
- ✓ Have full control of all site collections
- ✓ Have full control of all site collections
- ✓ Send a teamwork activity as the user
- ✓ Read all groups
- ✓ Read items in all site collections
- ✓ Read all users' full profiles

If you accept, this app will get access to the specified resources for all users in your organization. No one else will be prompted to review these permissions.

If you accept, IT-Dev Engagy Comms Service will also have access to your user profile information.

Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy statement. **The publisher has not provided links to their terms for you to review.** You can change these permissions at <https://myapps.microsoft.com>. [Show details](#)

Does this app look suspicious? [Report it here](#)

Cancel

Accept

- o Accept required permissions for IT-Dev Engagy Comms Teams Apps application. Go to page and log in using Global Administrator account https://login.microsoftonline.com/common/adminconsent?client_id=c1b58d33-1d41-4dce-a42a-2ebfccafbf66.



admin@sp.z o. o

Permissions requested

Review for your organization

IT-Dev Engagy Comms Teams Apps

[IT-Dev sp. z o. o](#)

This app would like to:

- ✓ Have full control of all site collections
- ✓ Read all groups
- ✓ Read items in all site collections
- ✓ Sign in and read user profile
- ✓ Read all users' full profiles

If you accept, this app will get access to the specified resources for all users in your organization. No one else will be prompted to review these permissions.

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Does this app look suspicious? [Report it here](#)

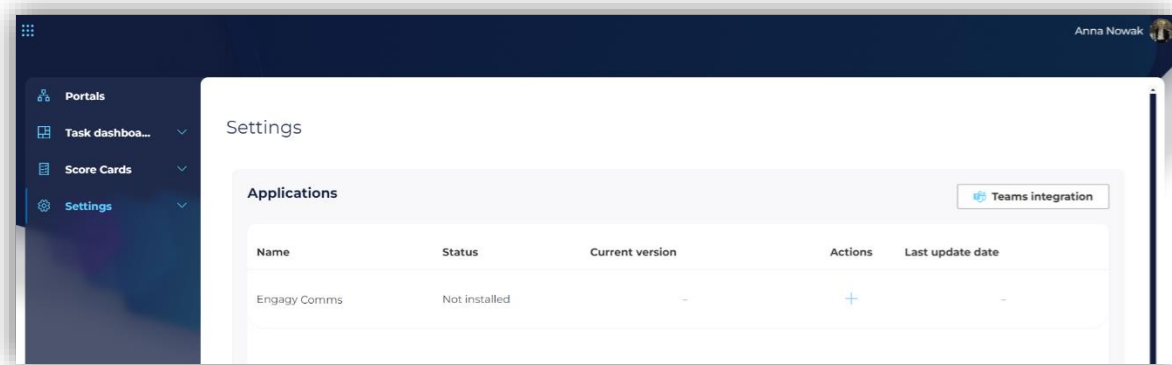
Cancel

Accept

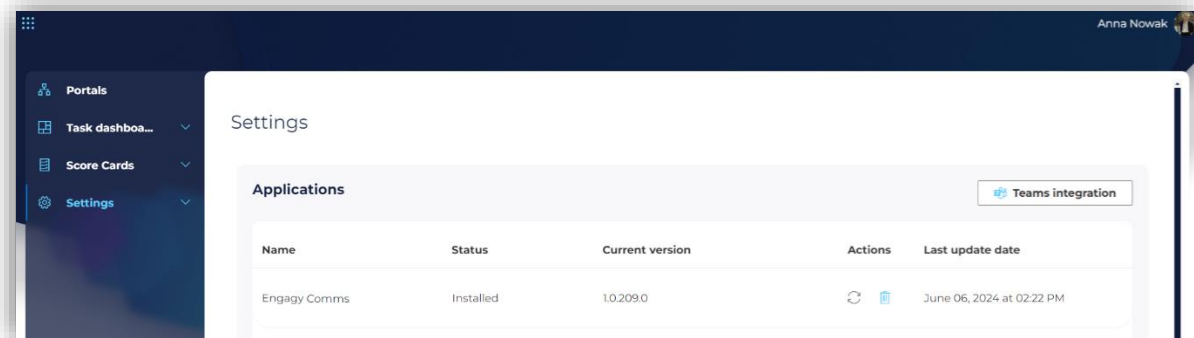
Important: After accepting the required permissions, go to Microsoft Teams admin center and distribute the app to the users.

2. Install prerequisite application

- Go to [Engagy Comms website](#).
- Find Engagy Comms app and press '+' button.



- The app will be automatically added to your tenant app catalog and all necessary API Access permissions will be accepted. It takes approximately 5 minutes to complete the operation.
- After successfully adding the app, you will see your app with status: **Installed** with info about currently installed version and last update date.



How to Use Guide for End Users

1. **Access Microsoft Teams:** Open the Microsoft Teams App on your device
2. **Search for the app:**
 - Press the *Apps* button
 - In the app search bar write *Engagy Tasks*.
3. **Add the app**
 - Press the *Add* button in the Engagy Tasks app tile.
 - Press the *Add* button again.
3. **Browsing tasks:**
 - There are 4 categories of tasks presented: Site template setup, User feedback, Access review, and Approvals.
 - The main view of the app presents active tasks in each of the categories.
 - Closed tasks can be seen after pressing *See all* button, under the *Completed* tab.
 - Previewing tasks is enabled by the 'eye' icon.
4. **Closing tasks:**
 - Each task can be mark as completed after pressing *Complete* button located on the bottom of the task's preview, or by the 'tick' button presented on the right-down side of the task tile.
5. **Reopening tasks:**

- Each completed task can be mark as active after pressing *Reopen* button located on the bottom of the task's preview.
6. **Adding new tasks:**
- User feedback: log in to the SharePoint site and report a bug using 'Report a problem' icon located in the taskbar on the top of the site. The task will be then added (it may take a couple of minutes) in the Engagy Tasks app in the User feedback category.
 - Approvals: go to Engagy Comms Portal, press your portal's name, and then press '+Add' > 'Create site from a template' button. Choose any of the given site templates and press 'Use template' button. Fill out the required fields and press 'Submit for a request' button.
 - Site setup template: log in to the Engagy Comms Portals panel and create new site from template by using '+Add' > 'Create site from template' button. Choose any of the given site templates and press 'Use template' button. Fill out the required fields and press 'Create' button. After the site is created, site setup template tasks will be added in the Engagy Task app. It may take several minutes
 - Access review: after your new site is added, go to Engagy Comms Portals panel, press the Edit icon located in the site's row and go to Site governance tab, Access review section. Press checkbox 'Owners group should be reviewed', set for every 1 day, and press 'Save' button. Approximately at 12 PM UTC +1 / Central European Time (CET) the Access review task will be added to the Engagy Task app.

How to Get Support?

For assistance with the Engagy Tasks app, use the following resources:

Email: biuro@it-dev.pl

Phone: +48717234904