

# MS Teams: Guest Access



Please remember that information you record on Teams could be disclosed in response to a freedom of information request or to someone you refer to in Teams chat. Consider the appropriateness of what you record. If you are unclear about how and where to appropriately record information, please contact the Information Governance Team at [dpa@abdn.ac.uk](mailto:dpa@abdn.ac.uk).

## Inviting an External Guest

### Step 1: Confirm UPN of External Guest

There is an authentication issue when external guests are invited to UoA Teams using their display email address, as opposed to their UPN (User Principal Name) or username.

Therefore, it is vitally important **prior** to inviting guests to your Team that you confirm with them what their UPN/username is - i.e. what email address format do they normally use to log on to their own organisations resources with?

i.e. for the University of Aberdeen, staff log on with their UPN, in these formats:

- [s09jb9@abdn.ac.uk](mailto:s09jb9@abdn.ac.uk)
- [abc123@abdn.ac.uk](mailto:abc123@abdn.ac.uk)

But their outward facing email address is in one of these formats:

- [joe.bloggs@abdn.ac.uk](mailto:joe.bloggs@abdn.ac.uk)
- [joebloggs@abdn.ac.uk](mailto:joebloggs@abdn.ac.uk)
- [jbloggs@abdn.ac.uk](mailto:jbloggs@abdn.ac.uk)
- [j.bloggs@abdn.ac.uk](mailto:j.bloggs@abdn.ac.uk)
- [joe.bloggs1@abdn.ac.uk](mailto:joe.bloggs1@abdn.ac.uk)

Therefore, University of Aberdeen staff should be invited to other organisation with their UPN (s09jb9@abdn.ac.uk) and **not** their email address.

### Step 2: Invite External User(s) to a Team

1. Navigate to your Team,
2. Click the **ellipses** beside the Team name,
3. Click **Add Member**.
4. Copy and paste their UPN into the **Type a name or email** box,
5. Select the **Add [UPN] as a guest?** box when it appears,
6. Click **Add** (*note external users can only be added as Guests - you cannot add them as a Member*).

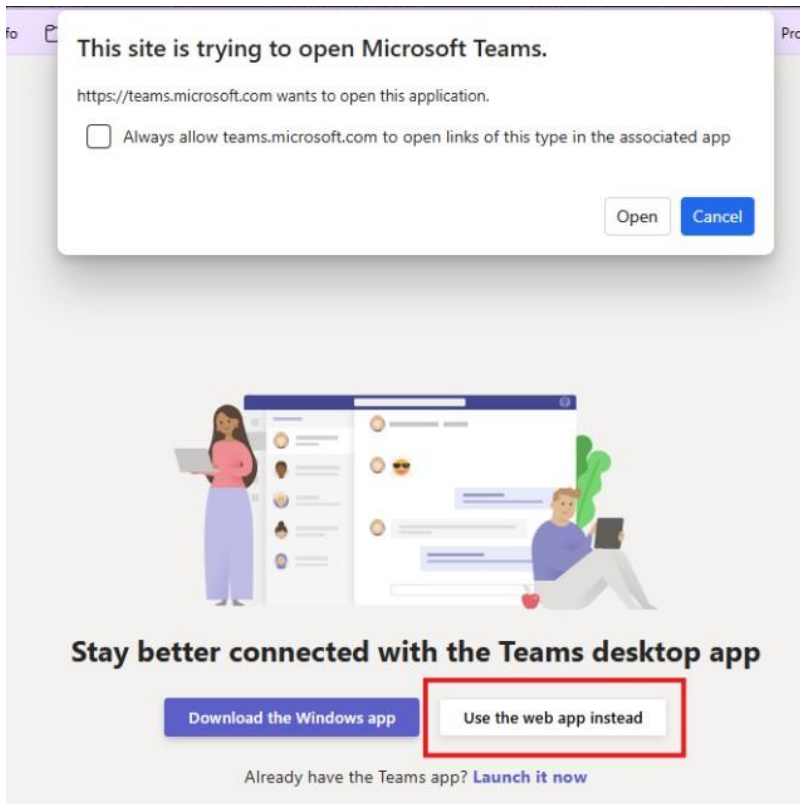
If you are not the Owner of the Team you can still add a Guest (in the same way) except the **Add** button will be called **Send Request**.

The Owner of the Team will need to review and approve before the guest is invited.

# Being Invited as an External Guest

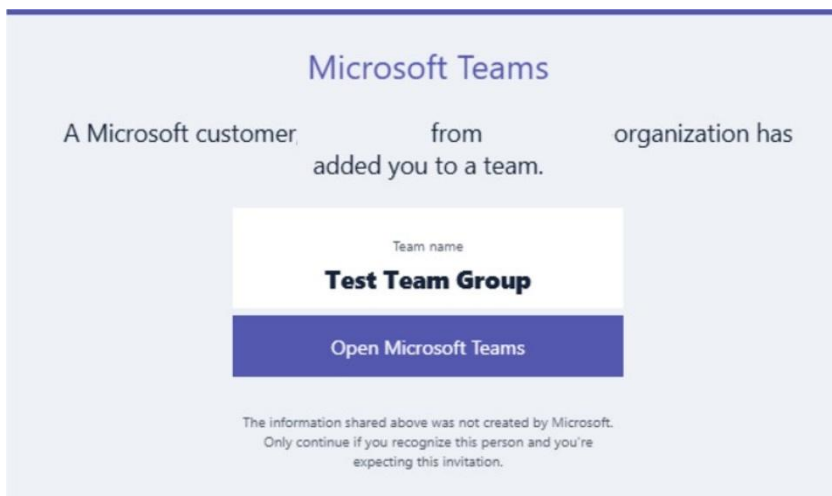


Ensure, whenever prompted, that the **web version** of Teams is used for the initial set up. Cancel any pop-up asking to open Microsoft Teams and choose “Use the web app instead”



## Step 1: Locate the Invite and Initiate Set Up Process

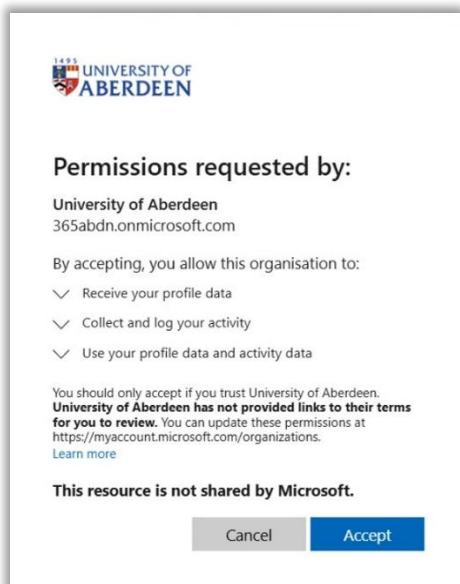
- As a guest, you will receive an email with the subject “You have been added as a guest to [Team Name] in Microsoft Teams” with a purple button labelled **Open Microsoft Teams**,



- Click on the **purple Open Microsoft Teams** link,
- If prompted, ensure the **web version** of Teams is used.

## Step 2: Review and Accept Permissions

- The first part of the set up process asks for permissions to be accepted (see screenshot below for what the screen may look like - it may differ slightly, if Microsoft update their log in screens).
- Select **Accept** on the Review permissions screen.



If the permissions are **not** accepted, it will prevent access to the Team.

## Step 3: Set up MFA for the University of Aberdeen

- The next part of the process requires an MFA (multi-factor authentication) method to be set up for the University of Aberdeen.
- **This is separate to any MFA you may have for your own organisation and must be completed before you can access University of Aberdeen resources.**
- Select **Next** on the “Let's keep your account secure” or the “More information required” screen,
- You may be prompted to enter your password.
- Follow the online prompts to set up your preferred method of MFA - it can be via authenticator app (the default option) or by telephone/text message (select **Set up a different way to sign in**).
- It should ask you to test out your method once chosen.
- Once completed, click **Finished** or **Done** (the button label is dependent on which method has been set up).

## Step 4: Review and Accept Guest Terms of Use

- The last step of the set up requires you to read and accept the University of Aberdeen's Guest terms of use.
- This screen may appear directly after setting up MFA **OR** it may prompt you to open the Teams app - you **must** ensure you select **Use the web app instead** to complete this step.
- It may prompt you to log in again.
- The screen will redirect and display the **University of Aberdeen Terms of Use**.

- Click on **Guest terms of use** to expand them, read through and click **Accept**.



If you decline the Guest terms of use, it will prevent access to the Team.

- If a pop-up appears asking if you wish to stay signed in - you can click either **No** or **Yes** depending on your preference.
- You will now be logged into the **University of Aberdeen's Team app** on the web and should see the Team you were invited to in your Teams list.

## Step 5: Navigating between your Organisation and another Organisation's Teams

To switch between your organisations list of Teams, and another organisation's list of Teams, you can utilise the **Account Switcher** feature in Teams (see below for example).

This features exists in both the web version of Teams, and the desktop App. However, it only will appear in the desktop app version after you have set up correctly via the web.

- Click your **profile circle** located at the top right of your Teams screen,
- The name of the organisation that you are currently viewing will be displayed at the top and beside your profile circle.
- Underneath your availability status, work location etc. you will see all the other organisations that you are either a member of, or a guest of.
- Selecting these will then let you see and work with all the Teams you are a part of for that particular organisation.



You will not be able to view your organisation and other organisations Teams at the same time - you will always have to use the Account Switcher feature to navigate between them

- If the Account Switcher does not appear on the desktop app, you should Quit Teams and restart it (right-click the Teams icon in the toolbar and select **Quit**).



## Account Switcher

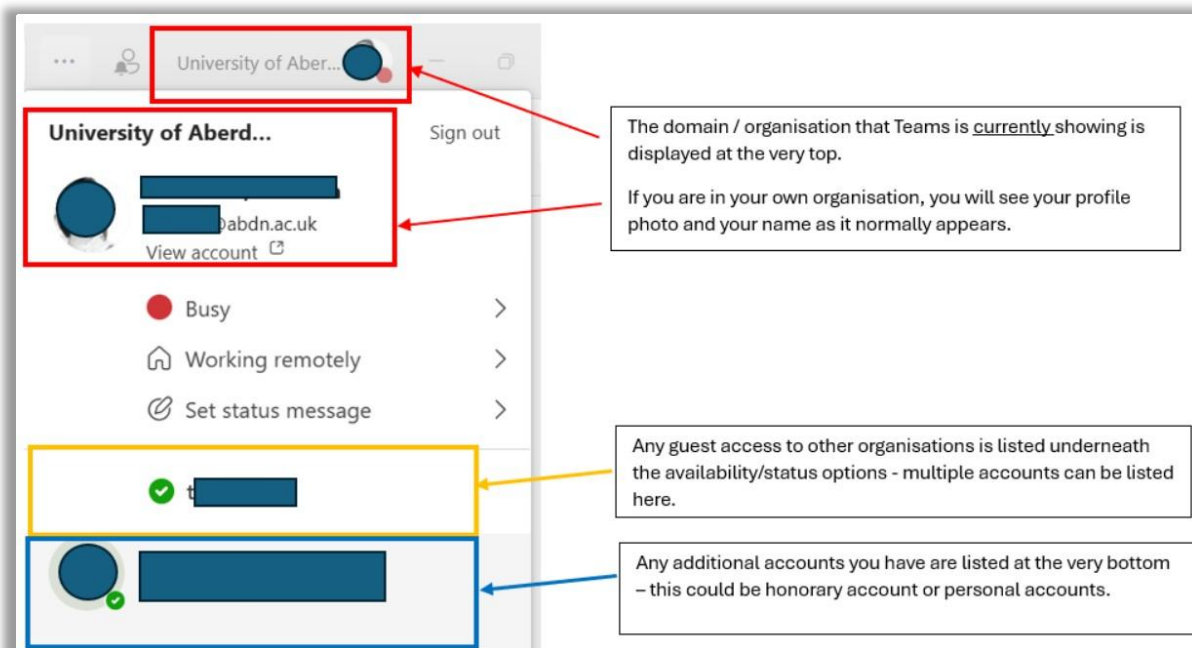
There can be issues when locating a Team after someone has been invited to and successfully set up access to and often is just a case of locating and using the Account Switcher ([see page 5 for details](#)).

## Potential Pitfalls & Risks

- Users should ensure that the Guests email is properly entered when inviting a guest to a Team.
- Users should ensure they are inviting Guests with their UPN and not their display email address.
- Guests should ensure initial set up is fully completed via a web browser and not the Teams app. Permissions, Guest terms of use must be accepted and an MFA method must be set up.

- Where Guests no longer need access, their access to the Team should be removed immediately.

## Account Switcher view when viewing from your own organisation:



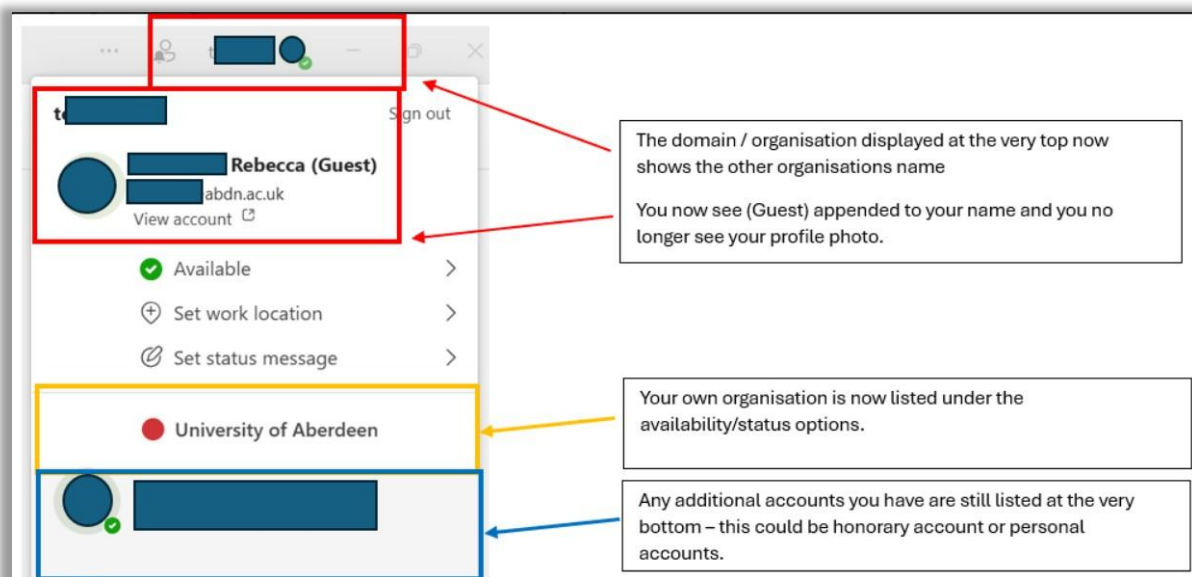
The domain / organisation that Teams is currently showing is displayed at the very top.

If you are in your own organisation, you will see your profile photo and your name as it normally appears.

Any guest access to other organisations is listed underneath the availability/status options - multiple accounts can be listed here.

Any additional accounts you have are listed at the very bottom - this could be honorary account or personal accounts.

## Account Switcher view when viewing another organisation:



The domain / organisation displayed at the very top now shows the other organisations name

You now see (Guest) appended to your name and you no longer see your profile photo.

Your own organisation is now listed under the availability/status options.

Any additional accounts you have are still listed at the very bottom - this could be honorary account or personal accounts.

## Further information and help

See [Guides and Links](#) in our **MS Teams** resource on Toolkit, or contact the IT Service Desk: [myit.abdn.ac.uk](http://myit.abdn.ac.uk).