Working with those external to the University in Microsoft Teams

It is possible to work with those external to the University in various ways using Microsoft Teams. More information about guest and external access is available on the Microsoft support page: Call and chat with users from other organizations in Microsoft Teams.

There are several things to consider depending on what you are trying to achieve.

Lancaster University IT accounts

You can find out who is entitled to Lancaster University IT accounts with an @lancaster.ac.uk email address at: University IT account types. If you wish to meet or collaborate with someone who is entitled to a University IT account, you should ensure they are aware of their University account details and always use their Lancaster University IT account to add them to meetings or to a team space, by typing in their name and selecting them from the directory. This ensures they get the best possible experience and minimises the risk of issues.

They should then always use their Lancaster University login details when accessing Teams meetings or collaborative team spaces.

They can still do this even if they also use Teams as part of another organisation; they may just need to use the organisation switcher at the top right to switch to Lancaster University. Note that the organisation switcher drop down may not appear for up to 24 hours after they have accepted an invite to the team.

Anyone with a University IT account can access full training and support for Teams at: Microsoft Teams help and training.

The rest of the advice on this page relates to working with external people who are not entitled to a Lancaster University IT account with an @lancaster.ac.uk email address. This includes most partnership staff and all partnership students.

Meetings and live events

If you are holding a one-off meeting or live event, you can invite those external to the University to the meeting in a number of ways (e.g. emailing them the invite). For further information and training on this, see: Microsoft Teams help and training.

There is no need to set up a Team space just to hold a one-off meeting or event, and it would not be advisable to set up a team unless one is needed for a specific reason.

External people should always be able to join meetings as a guest without needing to sign up for an account or log in. It doesn't matter whether they are from an organisation that uses Teams or not. In the case of live events, if an external person needs to present, they will need to have been added to any Lancaster University team beforehand.

It is advisable to send guests you invite to meetings this help link: Joining online meetings, webinars and other events in Microsoft Teams.
Ongoing collaboration in teams

If you want to collaborate on an ongoing basis by adding an external person to a team, whether or not people use Teams in their own organisation, you should always add them to the team by using the Add members option and entering their external organisational or personal email address in the box.

Add members to Grp-Digital Skills Training Team
Start typing a name, distribution list or security group to add to your team. You can also add people outside your organisation as guests by typing their email addresses.

test@gmail.com

Add test@gmail.com as a guest

In order to access the team, the person will need to click the link in the email they automatically receive from Microsoft (you should not manually send them any links to the team as these may confuse matters and may not work). If they can’t see the email, advise them to check their Junk or Spam folder. What happens when they click on the link may differ depending on whether they have used Teams before.

It is advisable to send guests you invite to Teams this help video about the process they need to follow: Microsoft video: join a team as a guest.

You can view more information about what the email they receive looks like, as well as additional information about what guests can and cannot do in your team, on the Microsoft support page: Guest experience in Teams.

Troubleshooting common issues

- You should avoid emailing links to specific files, channels or teams to external guests. Instead, it is preferable to keep all of your communications within Teams itself. For example, instead of sending an email with a link to meeting agendas or minutes stored in Teams, it would instead be preferable for you to do a tagged announcement in the Posts tab of your team, attaching the file directly to the post. They will be notified by email of this anyway, but as it is sent by the system, they will always be able to use the link to access your post/file. If you manually send links via email, they are liable to not work reliably for all external guests. You can find out more about tagged posting at: Microsoft Teams help and training.

- If the external person sees a login screen like the one below, either in Teams or in a browser, they must enter their own Microsoft account details to sign in - they don’t need a University username and password. On the first screen, where it prompts for username@lancaster.ac.uk, they should instead enter either their organisational or personal email address (depending on which you used to invite them to the team), and then they should follow the further instructions to log in with their own credentials.

- If the external person is already using Teams as part of their own organisation, they will need to use the drop-down menu at the top right of the Teams interface to switch from their own organisation to Lancaster University and back again as required. They won’t be able to see Lancaster teams they are a member of in their list of teams unless they switch
organisation. Note that the organisation switcher drop down may not appear for up to 24 hours after they have accepted an invite to the team.

- If the external person has an issue accessing your Team in their Teams app, they can instead try on the web by following the link you send them (they should see an option to access on web rather than in the app).
- If the external person continues to experience issues, it is advisable for them to attempt to access your team in an incognito or private browser window. This helps by ensuring previous logins and cookies that might have been set do not interfere with access.

Calling and chat

In addition to the ability to meet on a one-off basis with external people and add them to team spaces, you can also directly call and chat with any Skype user and many Teams users from other organisations (as long as they have enabled open federation in their organisations Office 365). To do this, just search for the persons external username/email address in the Teams search bar. You will then be able to call and chat with them in the normal way. External people can also search for you in their Teams using your @lancaster.ac.uk email address.

For more information about this, please see the Microsoft support page: Native chat experience for external (federated) users

Further help

For more detailed help guides on the specific topic of working with externals in Teams, please see the Microsoft support page: Call and chat with users from other organizations in Microsoft Teams.

General training and support for Lancaster University staff and students is available at: Microsoft Teams help and training.

If you can't find the information either on this page or the Microsoft support pages to help with your problem, you can report a problem with Teams. When you do this, it is important you include as many details as possible to help diagnose the issue, such as:

- What team you have added the external person to;
- What email address you used to do this;
- Screenshots of any errors they received;
- As many details as possible of what they were trying to do when they experienced the issue.