

MICROSOFT TEAMS: A GUIDE FOR GUEST USERS

University of Waterloo | Alumni Relations

INTRODUCTION

We are using Microsoft Teams to provide information and updates to our global volunteers through a shared, interactive platform. Volunteers can also use this platform to communicate their new ideas, event updates, news, etc.

This guide has been created to help volunteers get comfortable with using this platform as guest users. This guide will take you through the process of setting up Microsoft Teams, and becoming familiar with its functionalities as a guest user.

If you have any questions while reviewing this guide, or encounter any technical difficulties, please feel free to reach out to: alumnivolunteer@uwaterloo.ca.

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GETTING STARTED

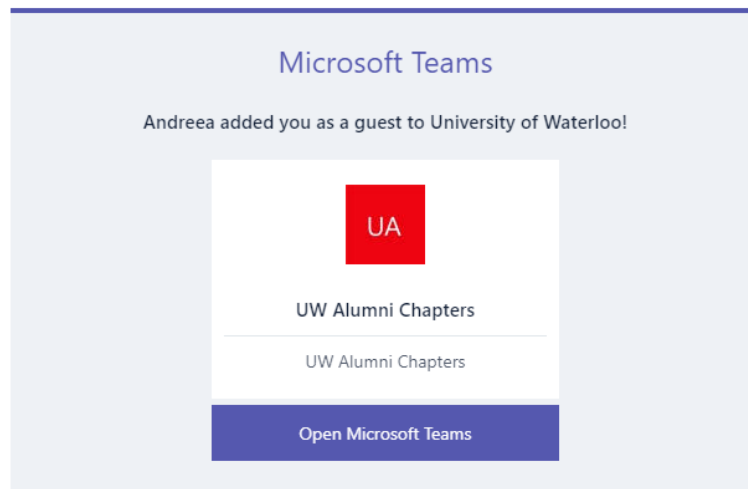
Note: Please do not sign up using an existing Microsoft Teams account (ex. from your business). We need to set up with a guest user account.

1. You will receive an email invitation to access Microsoft Teams:

You have been added as a guest to University of Waterloo in Microsoft Teams Inbox x

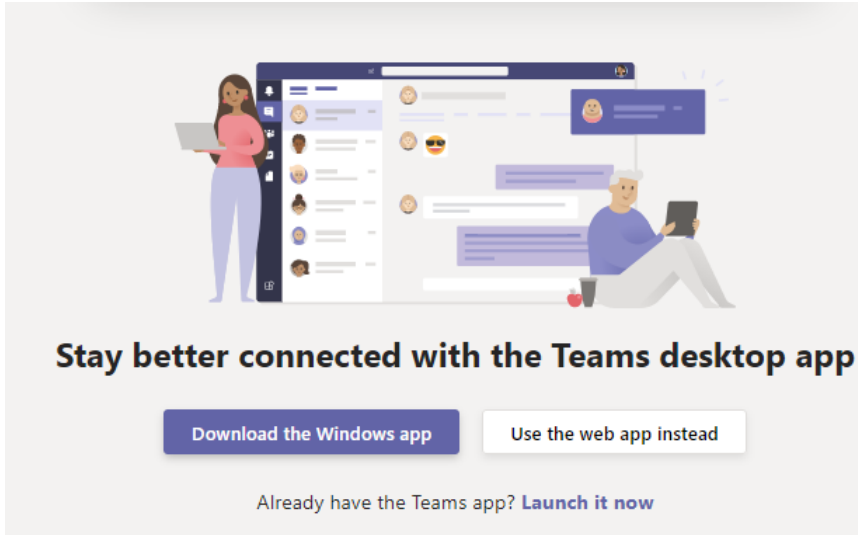
Microsoft Teams <noreply@email.teams.microsoft.com>
to uWaterlooalumni ▾

Fri, May

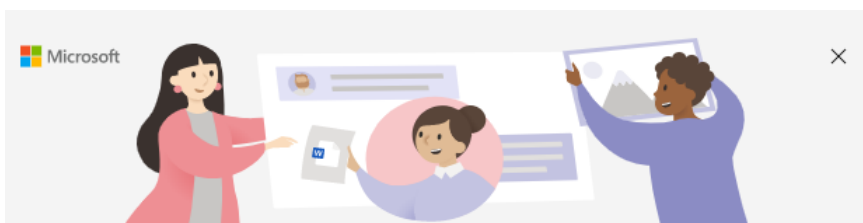


2. Click on the purple “Open Microsoft Teams” button
3. The next screen should show you two options for opening Microsoft Teams:
 1. Through the app, or
 2. Through the web browser

We recommend for users to select “Download the Windows app”. If you are not willing to download the app, you can still use Microsoft Teams by opening it in your web browser. If you already have the app installed, please scroll down to Step 4.





4. If you have already have the app for Microsoft Teams installed on your device:
 - Select “Launch it now” (this option is at the end of the sentence below the two buttons)
 - If this does not log you in directly, click on “University of Waterloo Guest” from the sign-in options.



Where would you like to start?

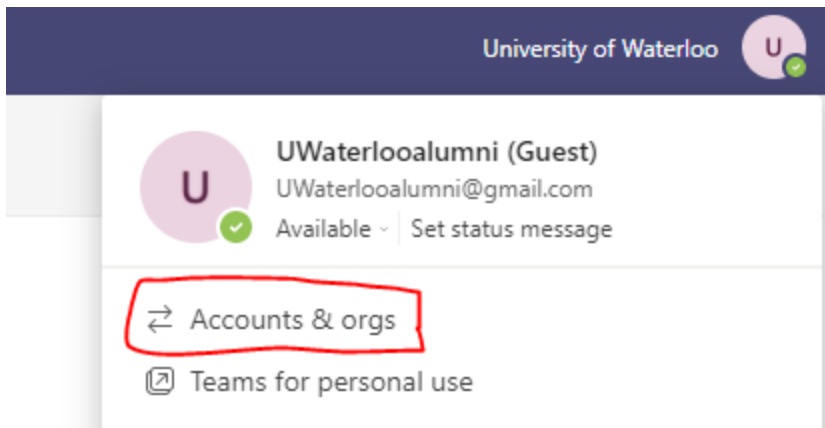
Two selection options are shown in a list:

-  **University of Waterloo** Guest
-  **Personal**

SWITCHING ORGANIZATIONS

If you already use Microsoft Teams under a different account, you can easily switch between your existing account and your guest account.

1. Go to the top right corner of your screen
2. Click on your user icon
3. Select “Accounts & orgs” to enter your other account and login information



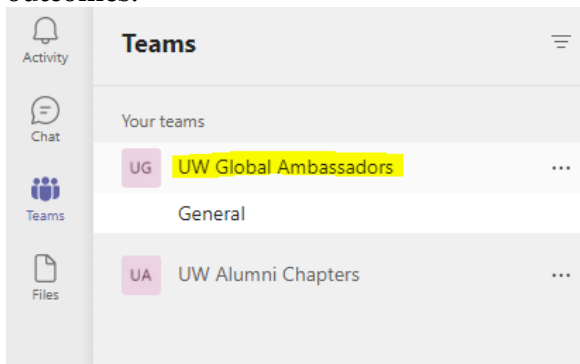
UPDATING YOUR PROFILE PHOTO

Updating your profile photo makes it easier for other volunteers to recognize who you are. To update your photo, you need to make this change via your email tenant. For example, if you are logged in via your Gmail address, you will need to update your photo under your Gmail profile.

YOUR TEAMS AND CHANNELS

WHAT IS A "TEAM"?

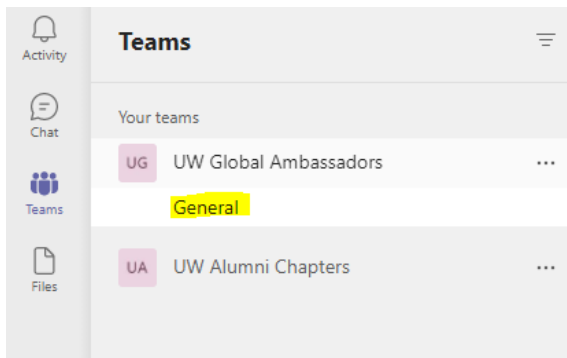
A **Team** is the collection of people, content, and tools that work together to achieve the desired outcomes.



[Understand teams and channels in Microsoft Teams - Microsoft Teams | Microsoft Docs](#)

WHAT IS A "CHANNEL"?

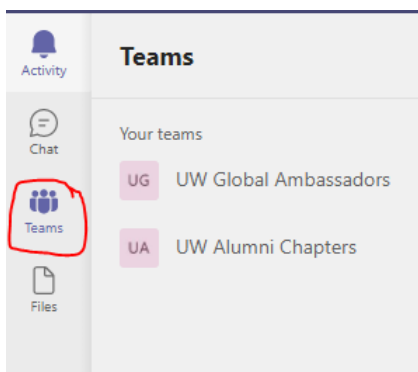
A **channel** is a collaborative space within a team where the actual work is done.



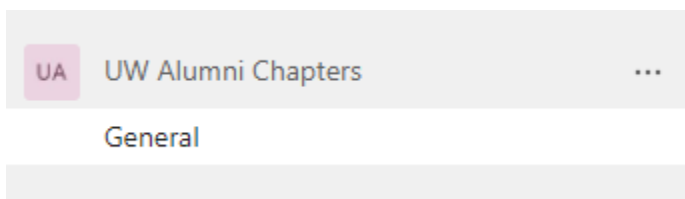
[Understand teams and channels in Microsoft Teams - Microsoft Teams | Microsoft Docs](#)

ACCESSING YOUR TEAMS AND CHANNELS

To access your Teams, click on the “Teams” icon in the left side bar:



- You will see a list of all of the Teams that you are a member of here, and you will be able to access these Teams from this section
- You can click on each Team to see which channels exist for the team



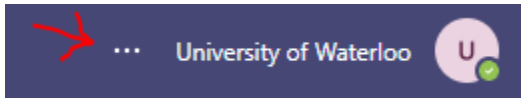
TURNING ON NOTIFICATIONS

It is very important that your notifications are turned on. You will miss messages if you do not check Microsoft Teams regularly. Please review the steps below and ensure that you have selected your desired notification options.

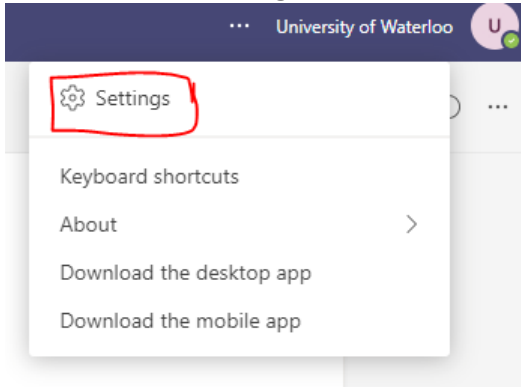
OVERALL NOTIFICATIONS

Notifications for Microsoft Teams in general (not including channel activity) are selected as follows:

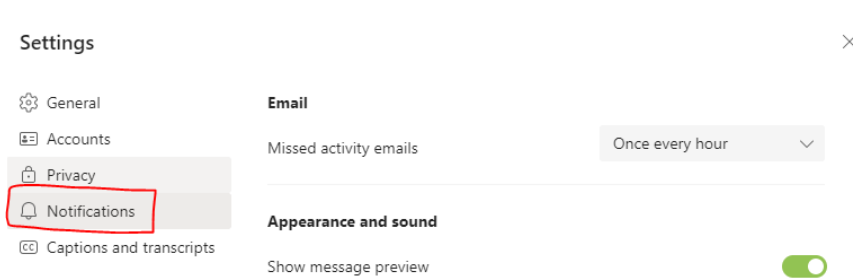
1. Click on the three dots beside your profile in the upper right-hand corner:



2. Select “Settings”:



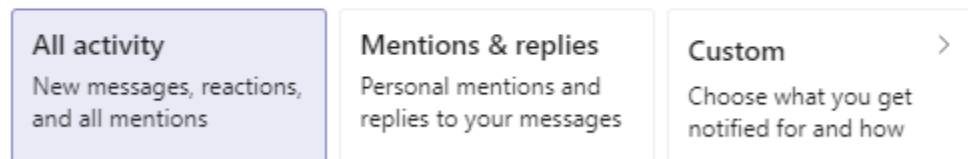
3. Select “Notifications”:



4. Under the “Teams and channels” section, select “All activity”:

Teams and channels

You will get desktop and activity notifications for:



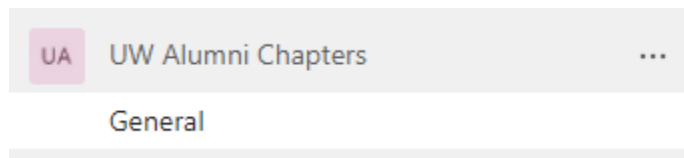
5. Adjust your notification settings as desired

CHANNEL-SPECIFIC NOTIFICATIONS

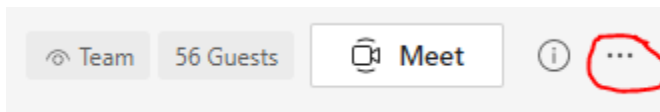
Notifications will need to be individually turned on for each of your channels.

1. Open up the channel

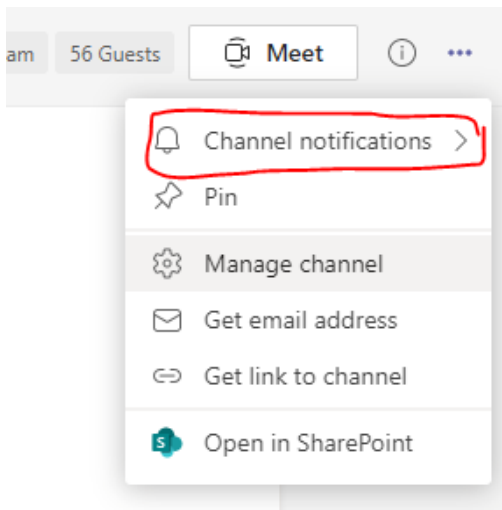
- a. On the left side of your screen, click on the Teams icon
- b. Click on the Team, and then on the channel (in this case, the channel is called “General”):



2. Click on the three dots in the upper right-hand corner of your screen:



3. Select “Channel notifications”:



4. Select “All activity”

MEETINGS AND CALLS

A **meeting** is pre-scheduled by a Waterloo administrator, guest users do not have permission to schedule a meeting. However, guest users can [call other guest users](#) and [start a meeting in a channel](#).

JOINING A MEETING

A guest user can join a meeting via the Teams app or by opening Teams in their web browser.

Starting Point: find and open up the email meeting invitation that you received.

JOIN A TEAMS MEETING FROM THE APP

1. From your email invite, select “Click here to join the meeting”:

Microsoft Teams meeting

Join on your computer or mobile app

[Click here to join the meeting](#)

Or call in (audio only)

[+1 226-243-6399,357409004#](#) Canada, Kitchener-Waterloo

[\(833\) 827-4832,357409004#](#) Canada (Toll-free)

Phone Conference ID: 357 409 004#

[Find a local number](#) | [Reset PIN](#)

Important: The Teams application should be used whenever possible. If attendees must dial-in to a meeting, use the toll-free dial-in number. Do not use 226-243-6399 or any other local number.

[Learn More](#) | [Help](#) | [Meeting options](#)

2. Select audio and video settings
3. Select “Join now”

JOIN A TEAMS MEETING ON THE WEB

- In your email invite, select “Click here to join the meeting”:

Microsoft Teams meeting

Join on your computer or mobile app

[Click here to join the meeting](#)

Or call in (audio only)

[+1 226-243-6399,357409004#](#) Canada, Kitchener-Waterloo

[\(833\) 827-4832,357409004#](#) Canada (Toll-free)

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[Learn More](#) | [Help](#) | [Meeting options](#)

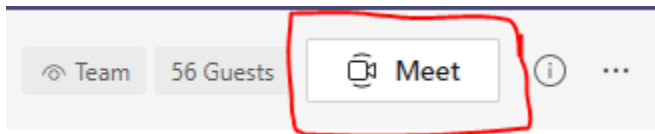
- You can also use a **dial-in number and conference ID** from the email to call in.
 - You have three choices:
 - a. Download the Teams desktop app
 - b. Continue on this browser: Join a Teams meeting on the web
 - c. Open your Teams app: If you already have the Teams app, go right to your meeting
1. Type your name
 2. Select audio and video settings
 3. Select “Join now”

[Join a Teams meeting - Office Support \(microsoft.com\)](#)



STARTING A MEETING IN A CHANNEL

1. Open up the channel
 - a. Click on the “Teams” icon at the left side of your screen
 - b. Click on the Team name
 - c. Click on the Channel name

2. Click on the “Meet” button found at the top right-hand corner of your screen:

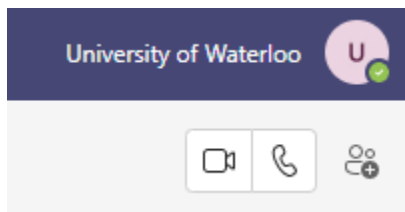


MAKING A CALL

- There are a few different ways to make a call in MS Teams
- You can make **Video calls**  or **Audio calls** 



1. Turn a chat into a call
 - When you're in a chat, select “Video call” or “Audio call” in the upper-right corner of Teams
 - The person you are chatting with (or the people, if it's a group chat) will receive a call from you



2. Hover over someone’s profile picture
 - Move your mouse over a profile picture. You will see a new box pop up with some options to connect with this person
 - From here, you can make a video or audio-only call to that person
 - The call will begin after you select an option
3. Enter a command
 - Type **/call** in the search box at the top of your Microsoft Teams screen

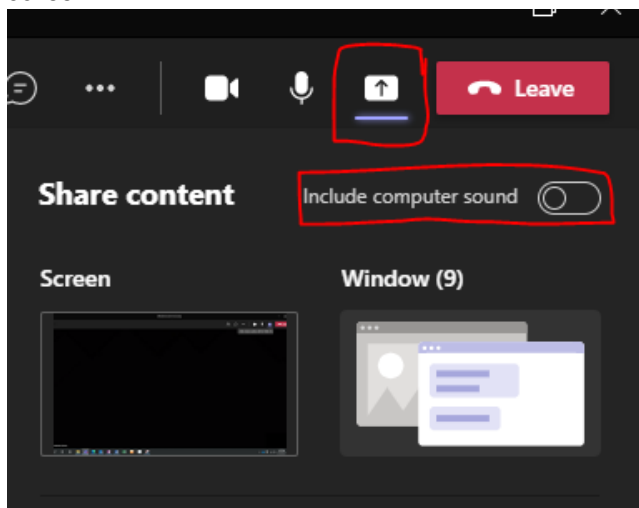


- Select the name of the person you would like to call
- The call will begin after you select an option

SHARING YOUR SCREEN

If you need to share your screen during a meeting, do the following:

1. Click on the up arrow in the square box, this can be found in the upper right-hand corner of your screen



2. Select the screen that you would like to share
3. **If you are sharing a video:** make sure you include computer sound, as indicated in the screenshot with Step 1

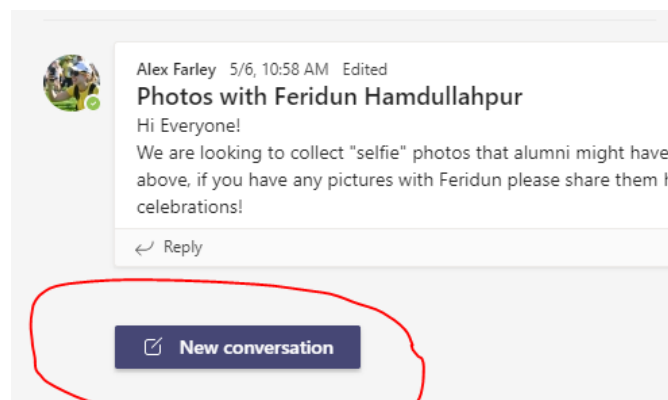
USING TEAMS TO CONNECT

As active volunteers, you may have a few ideas that you would like to bring up to the larger group. Please feel free to communicate with the group, we would love to hear from you!

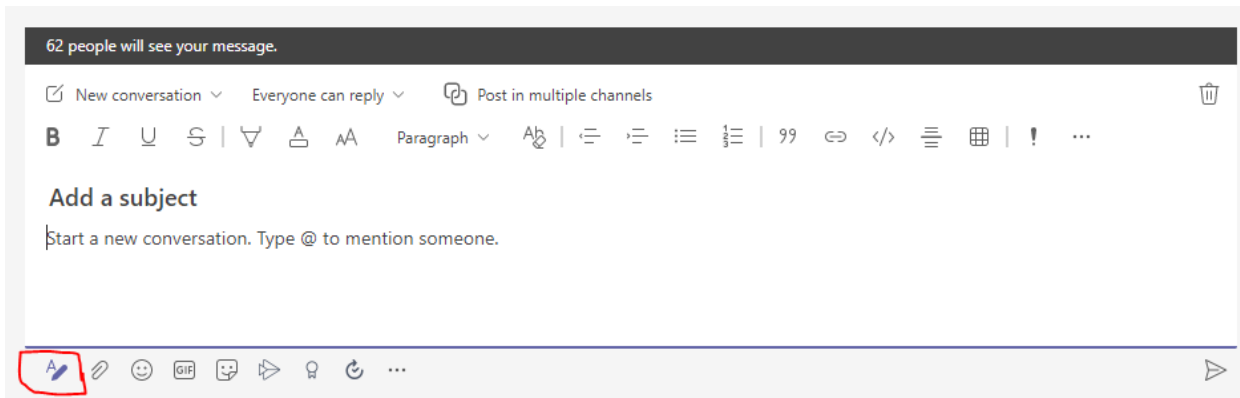
MESSAGING

HOW TO POST A MESSAGE IN A CHANNEL

- You can select “Reply” to respond to existing conversations
- You can start a “New conversation” in a channel by clicking on this button at the bottom of the screen:



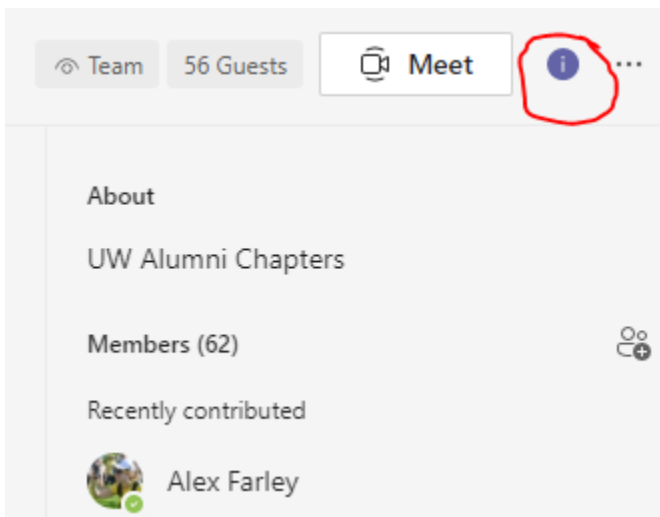
- If you select the “A” icon, you will see more editing options:



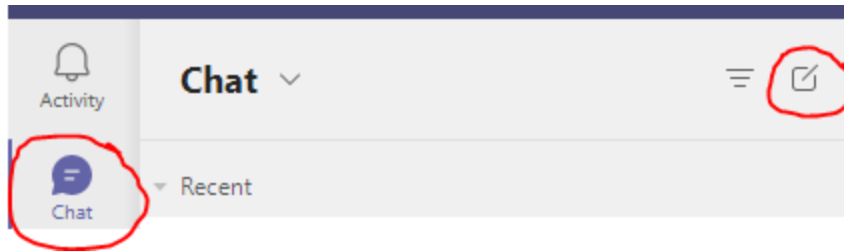
- If you would like to address the whole Team directly, you can type **@team** to send everyone a message notification

HOW TO MESSAGE PEOPLE PRIVATELY

- You can send direct messages to people in the Team
- If you click on the “i” icon in the upper right-hand corner, a list of people who are in the Team will appear:

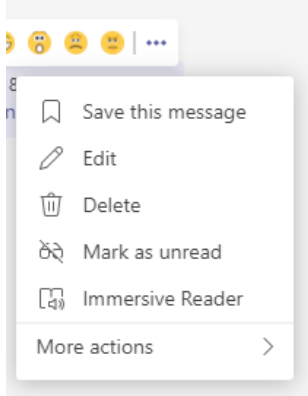


- If you hover over any of these profile icons, options to send a direct message will pop up
- You can also select the “Chat” icon from the left-hand side of your screen, then the box icon near the top of the screen to create a New Chat



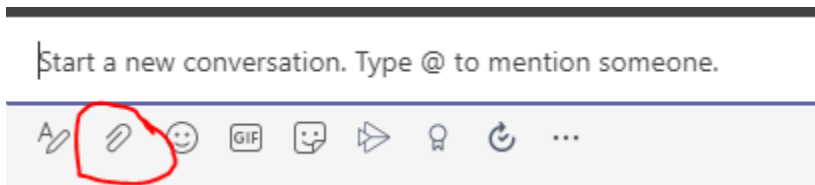
EDITING AND DELETING MESSAGES

If you hover over a message, a reactions bar will pop up with three dots for “more options” at the end. Select “more options” to edit or remove your messages.

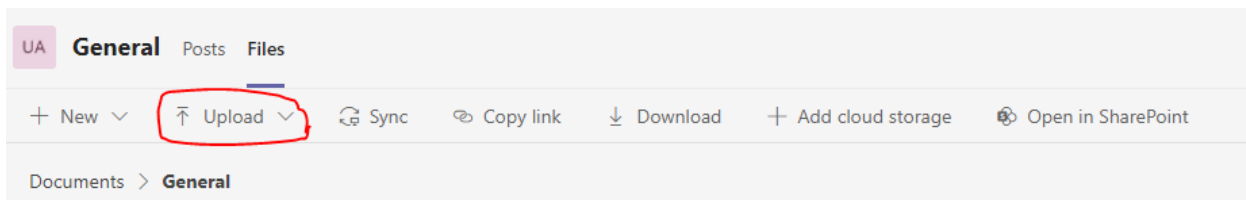


SHARING FILES

- If you want to share a file with the Team, there are two ways you can do this:
- Share a file through a post:
 - Select the paperclip icon that you can find underneath the chat box to open up your file:



- Upload your file under the “Files” tab:
 - The “Files” tab can be found at the top of your screen, beside “Posts”
 - Select “Upload” to add a file from your device

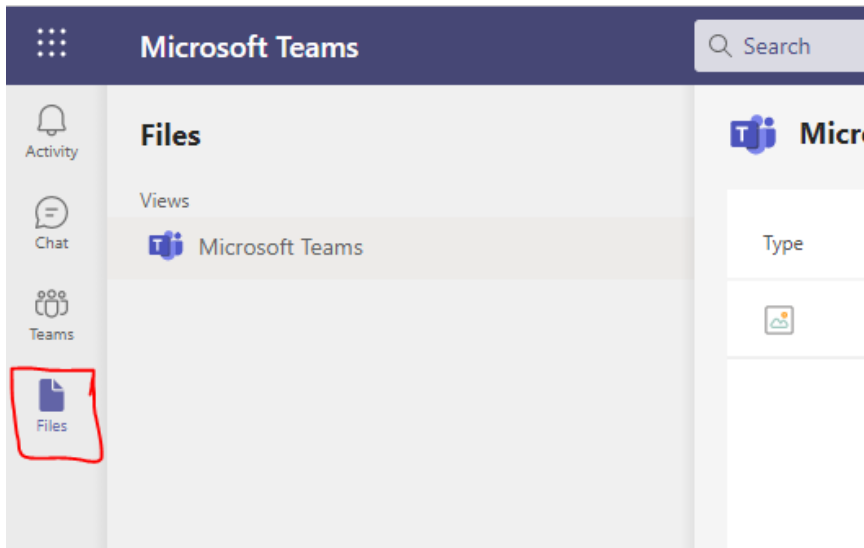


HOW TO ACCESS SHARED FILES

If you need to find a file that has been shared with you on Microsoft Teams, there are two ways to do so:

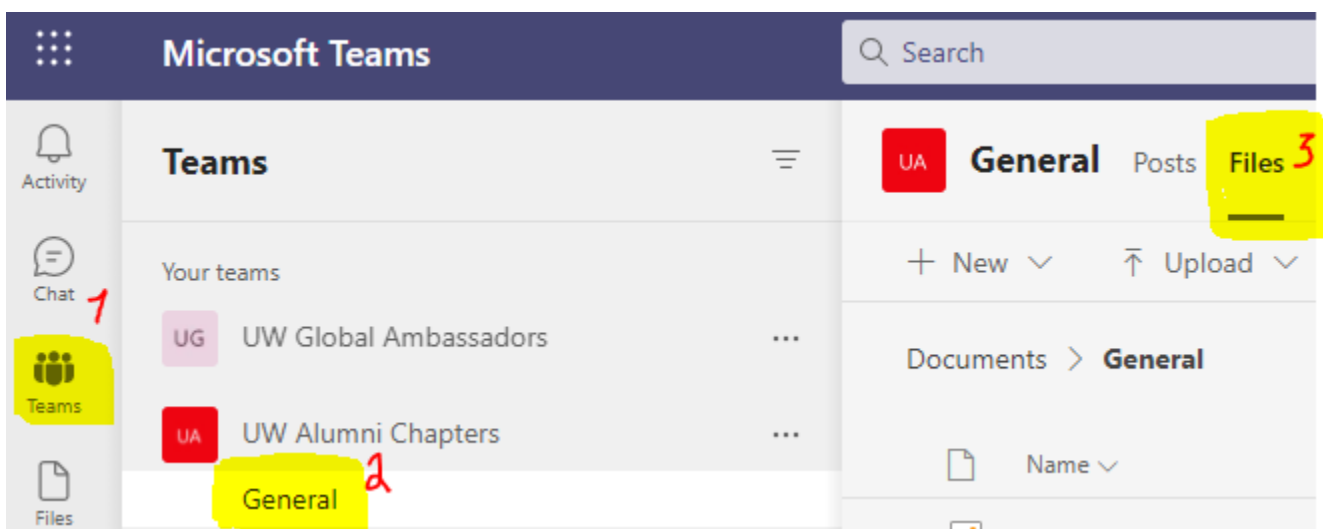
ACCESS FILES FROM THE LEFT SIDE MENU

- Click on the “Files” icon on the left side of your screen



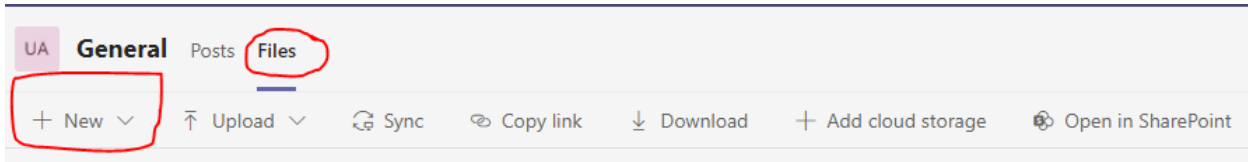
ACCESS FILES FROM WITHIN A CHANNEL

1. Click on “Teams” in the left side bar
 2. Click on the Team name that you are interested in, then on the channel name
 3. At the top of your screen, click on “Files”
- There will be a list of files that have been shared in this location

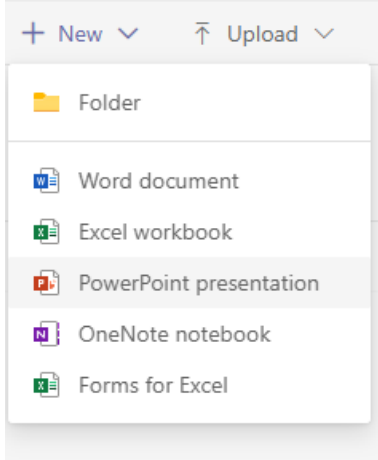


CREATING A NEW SHARED DOCUMENT

1. Open up the “Files” tab. This tab can be found at the top of your screen, beside “Posts”:



2. Select “+ New”, and choose your new file from the drop-down menu:

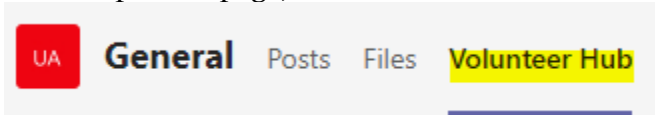


Other members of the Team will be able to see your new file under the “Files” tab.

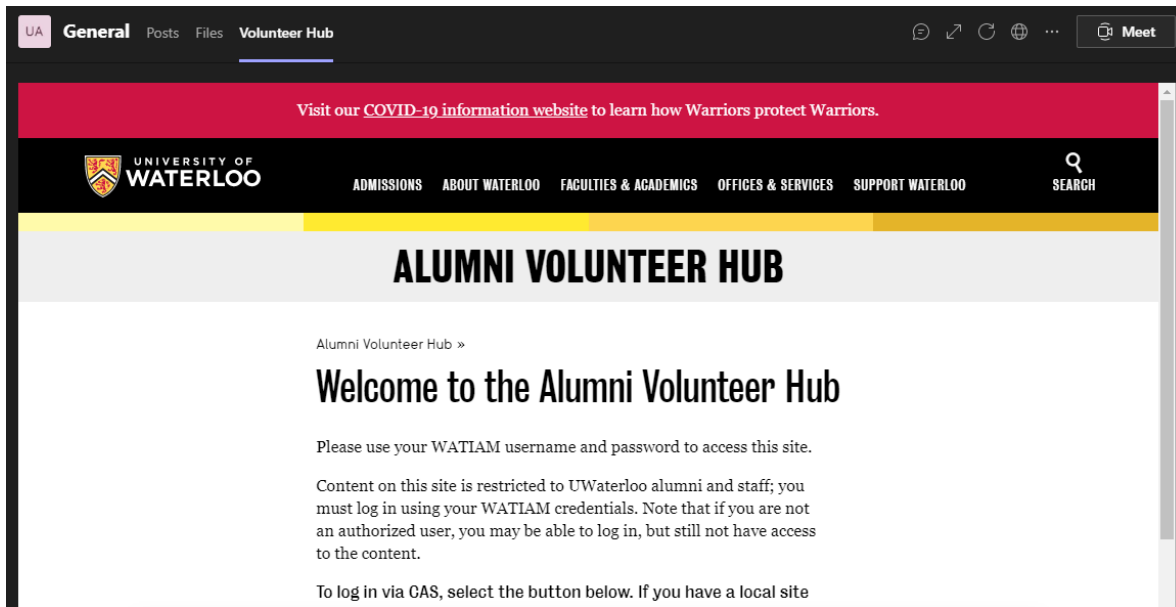
ACCESSING THE VOLUNTEER HUB FROM MICROSOFT TEAMS

You can access the Volunteer Hub directly from the Microsoft Teams desktop app, so that all of your work is kept in one location. Here’s how:

1. Open up the channel that you are interested in
2. At the top of the page, there should be a few tabs. One of them will say “Volunteer Hub”:



3. You should be able to see and use the Volunteer Hub directly in this tab:



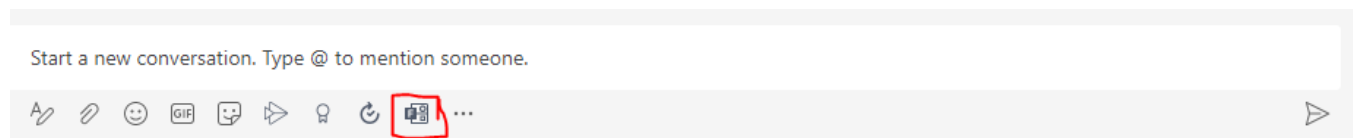
NOTE: this feature will not work if you have Microsoft Teams open in your web browser.

USING INTEGRATIONS

Integrations are extra apps that can be installed on Microsoft Teams to enhance collaboration and engagement between users.

MICROSOFT FORMS

- Forms can be used to generate quick polls or surveys to share with the group in the chat
 - The group can submit responses to the form in the chat
- To create a new poll:
 1. Open up the channel that you are interested in
 2. Click into the chat box at the bottom of the channel
 3. You should see a **Forms** icon to select at the bottom of the channel



[Work with colleagues to create, edit, and review forms in Microsoft Teams - Office Support](#)