

ONSIGHT HOW TO:

SEND AN EXTERNAL GUEST INVITE USING MICROSOFT TEAMS

This guide explains how to send an external guest invite from Onsight Connect using Microsoft Teams, and highlights what both the Inviter and Guest will see when sending and receiving a guest invite.

NOTE: Onsight Connect for Windows and Onsight Connect for Microsoft Teams software must be installed on your Windows PC prior to going through the steps in this document. You must have an active Onsight Connect account to login, make and receive calls and to send out guest invitations.

The Onsight Team App is available to Onsight Enterprise users. To purchase Onsight Enterprise, please contact us at info@librestream.com. If you are a current Onsight user and would like to upgrade to an Enterprise license, please contact your Librestream account manager.

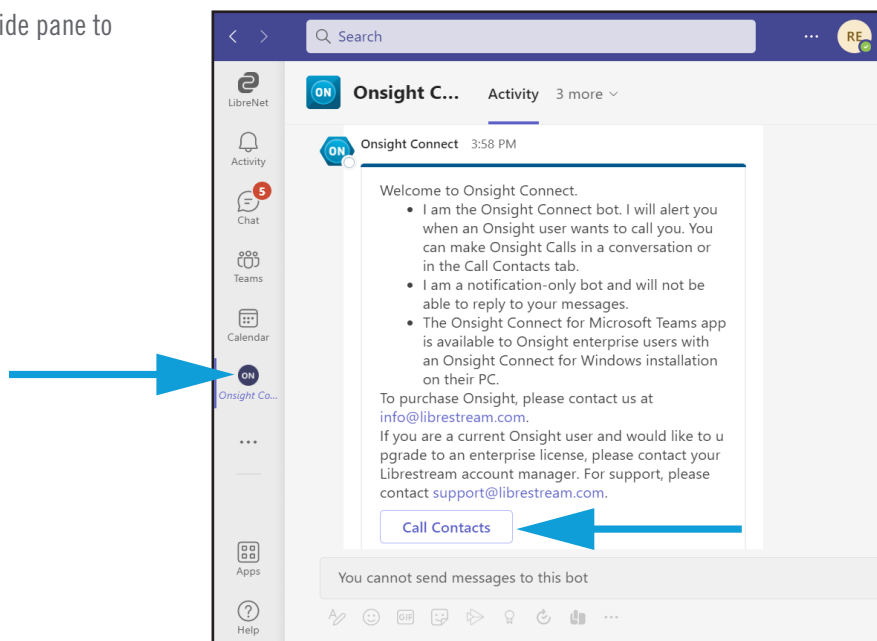
The document will refer to **Microsoft Teams** simply as **Teams**.

STEP 1 - START MICROSOFT TEAMS

1. Launch and log in (if necessary) to Teams using your Microsoft credentials.

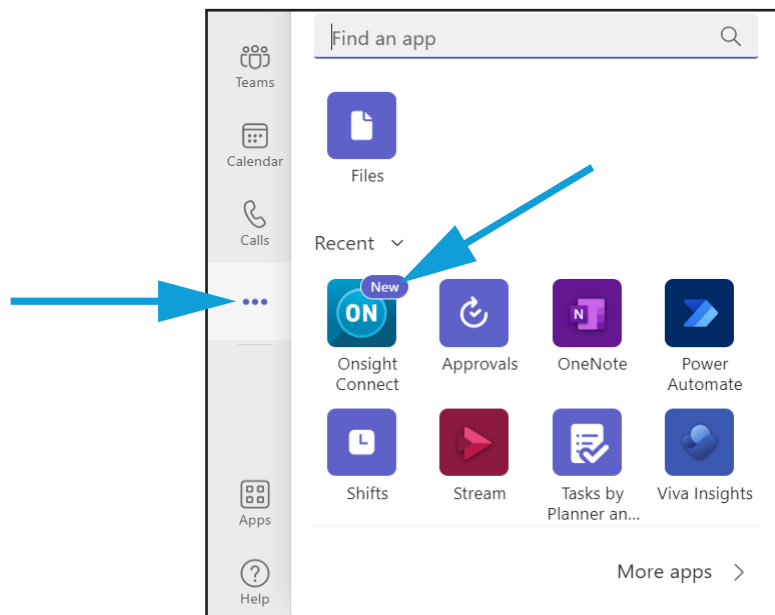
STEP 2 - LAUNCH ONSIGHT CONNECT

1. Click the **Onsight Connect** icon within the left-side pane to launch the application.
2. Click **Call Contacts**.



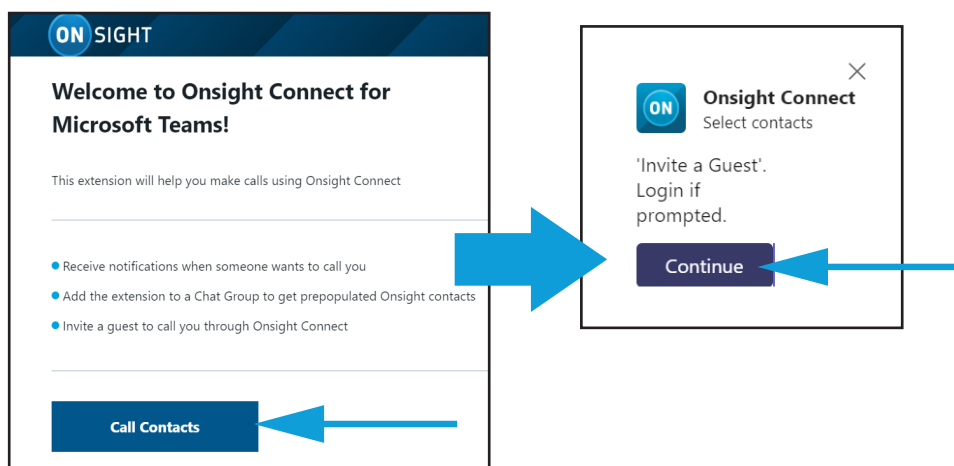
TIP: If the Onsite Connect app does not appear, then click the three dots (...) located within the left-side pane.

- Next, click the **Onsite Connect** app to run Onsite Connect within Teams.

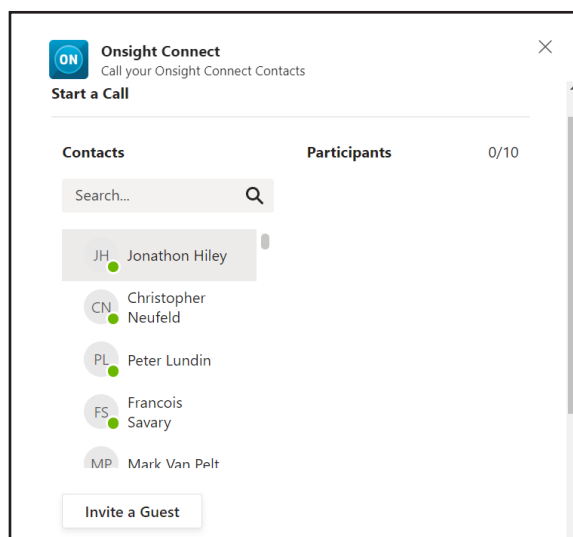


STEP 3 - CALL CONTACTS

- Click **Call Contacts**.
- Select **Continue** to advance.

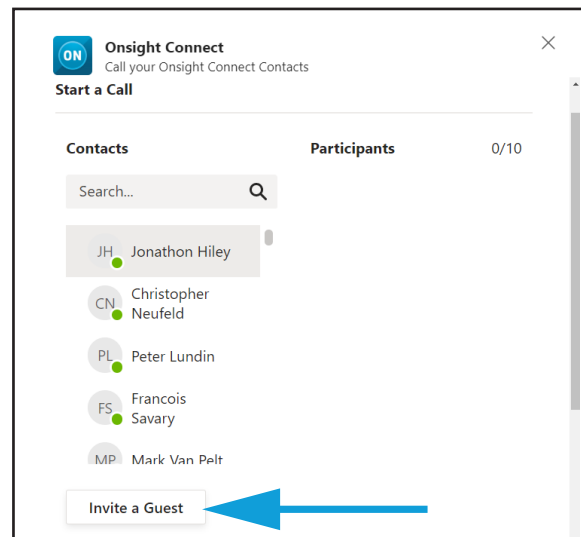


- The **Start a Call** screen displays **Contacts** and **Participants**.



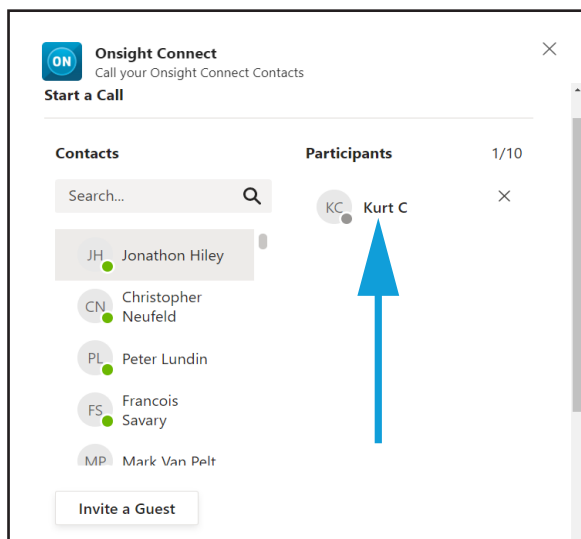
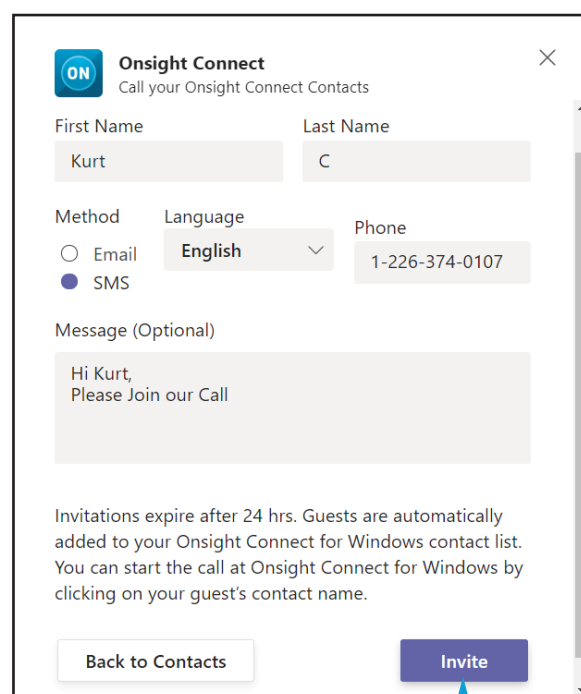
STEP 4 - INVITE A GUEST

1. Click **Invite a Guest** to send out a guest invitation.
2. Login, as necessary.



3. Enter contact information for the guest (Invitee). For example, Enter text within the **First Name** and **Last Name** fields.
4. Specify the **Language** for the invitation using the drop-down menu.
5. Define the **Method** of delivery as:
 - **Email**
 - Short Message Service (**SMS**) Text
6. Enter an **Email** address or **Phone Number** as determined by your choice for Step 5.

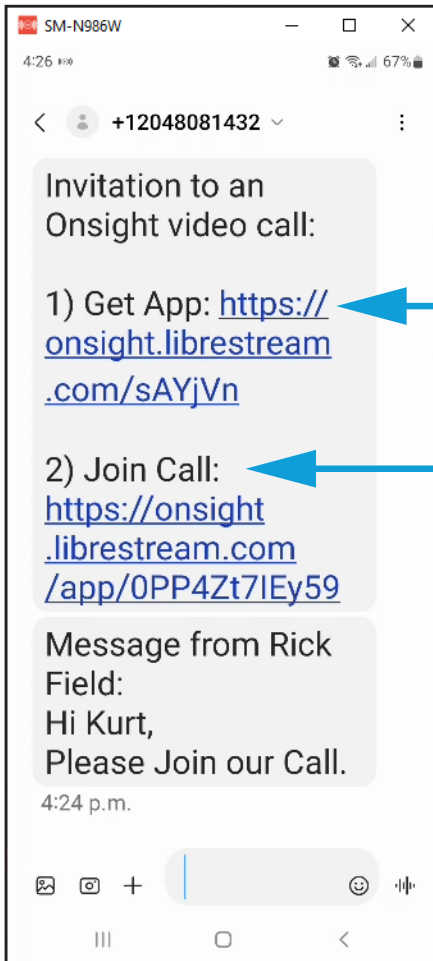
TIP: For an SMS Number, use the format: "+ country code + area code + number" for International calls, e.g., +44-555-555-5555, or "Area code + number" for calls within your region, e.g., 555-555-5555.
7. Click **Invite**. The Guest's name appears within the **Participants** section.



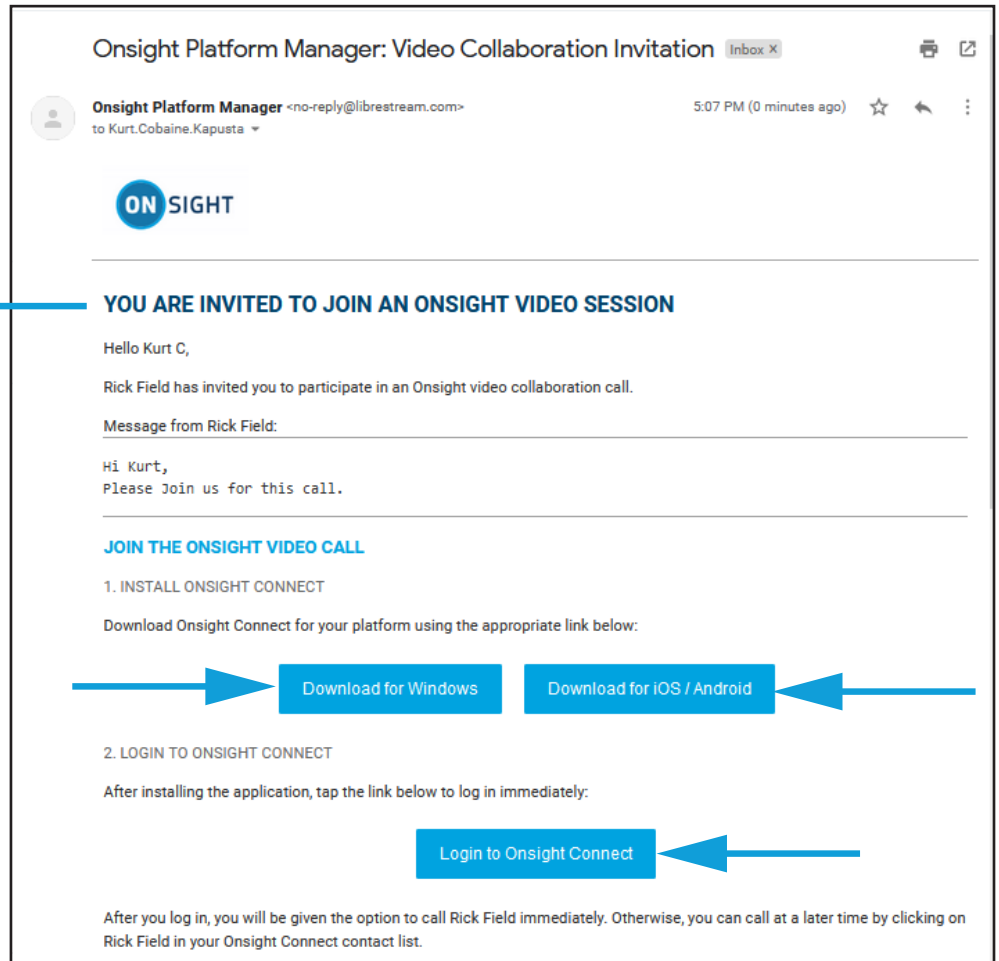
STEP 4 - RECEIVE A GUEST INVITE

1. The **External Guest** will receive an **Email** or **SMS** (text) invitation. The invite will contain the instructions on how to install the **Onsight Connect** software and join the call.
2. The guest click's the link provided in the **SMS** (text) or **Email** to **Download** or **Get App**. First time users will be automatically redirected to the App Store (Google Play or Apple Store) according to their device type (Android or iOS/Apple). Windows users click the link to Download the app from Onsight Platform Manager (OPM).

SMS INVITATION



EMAIL INVITATION:



STEP 4 - JOIN THE CALL

How Does The Guest Join The Call?

1. After the Onsight Connect software has been installed, the Guest must return to the invite message (SMS or Email).
2. Click the **Join Call** or **Login to Onsight Connect** link. The Guest will login automatically and call the Inviter.

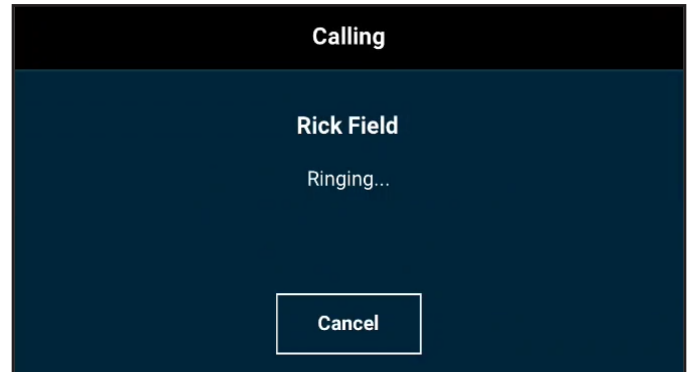
WHAT THE INVITER NEEDS TO KNOW

Your Onsight Administrator (Expert) can choose to set up an External Guest to use **Field** or **Expert Mode**.

Field Mode is simplified version of the Onsight Connect software. Field Mode enables the guest to view the video from their camera and mute their audio.

Expert Mode enables the guest user to share control and access all features of Onsight Connect.

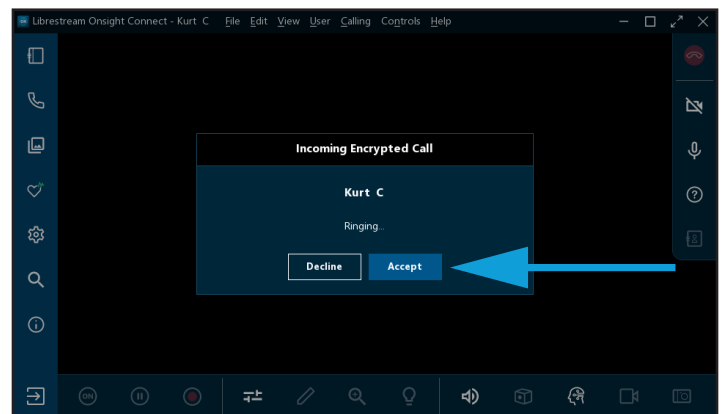
NOTE: The Inviter is the Expert and is in full control of the call and will guide the Guest with the camera. The Expert controls video sharing, recording and taking pictures. Both the Expert and Guest can telestrate (draw) onscreen providing the Guest accounts are configured to use **Expert Mode**.



STEP 5 - ACCEPT AN INCOMING CALL

1. The Inviter will receive a call from your Guest once they have completed Step 4. With Onsight Connect open on your screen, you will see the Guest's incoming call request.
2. Click **Accept**.

This completes the procedure.



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