STEP BY STEP GUIDE
SHAREPOINT
EXTERNAL SHARING

About Me

- Gregory Zelfond
- 10+ years of experience with SharePoint
- Huge SharePoint Advocate, blogger
- Love to solve business problems using code-free, out of the box SharePoint configurations
- Owner of SharePoint Maven (sharepointmaven.com)

About SharePoint Maven

I HELP ORGANIZATIONS TO UNLOCK THE POWER OF SHAREPOINT

MIGRATION

CONSULTING

TRAINING

Agenda

- External Sharing Intro
- How to Share a Site
- How to Share a Document or Folder
- External User Experience
- External Sharing Administration
  - Configure External Sharing
  - Remove External Users

EXTERNAL SHARING
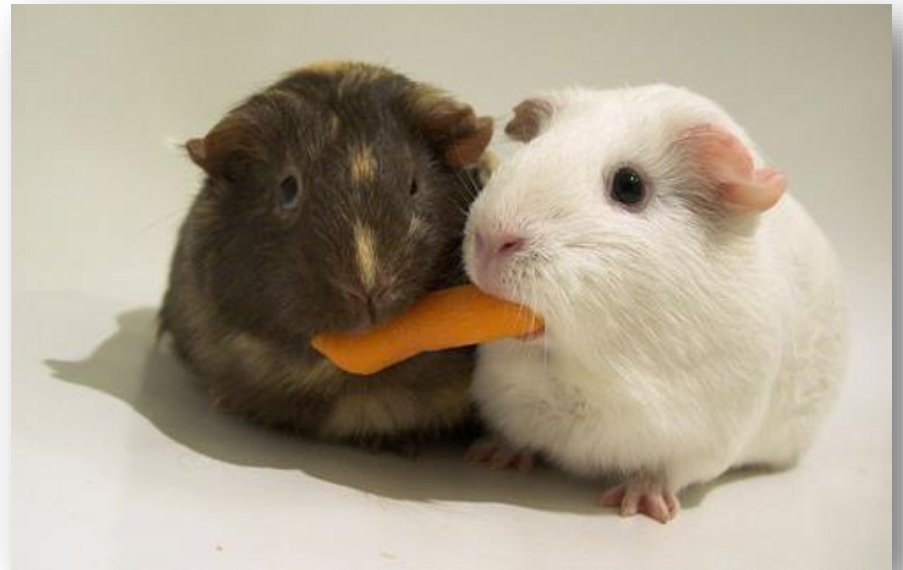
INTRO

Who is an External User in SharePoint?

- User who does not have an Office 365 License, but who has been given access to a site or document in your SharePoint environment

- Not an employee of the organization

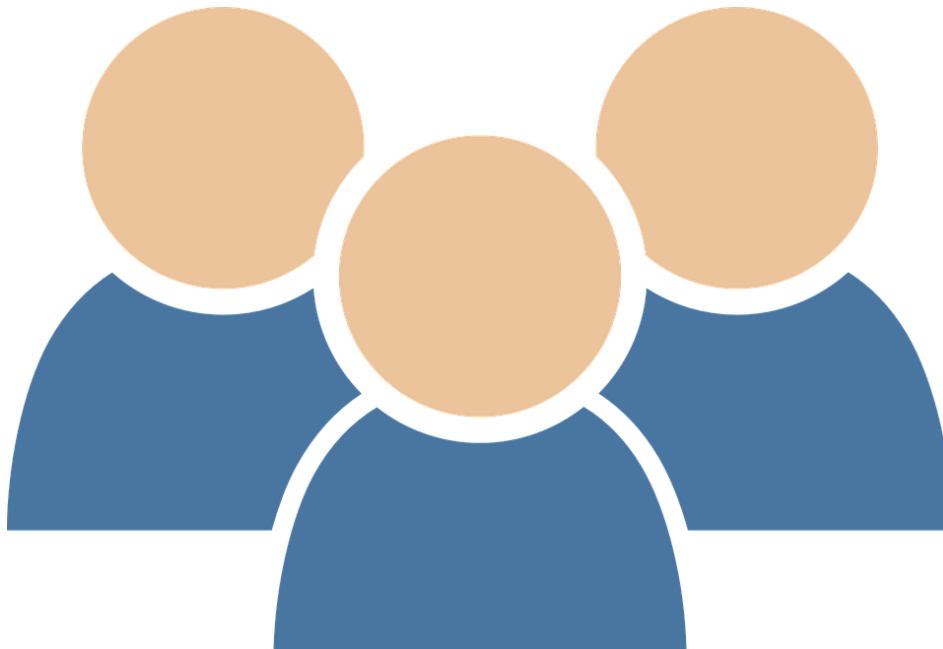- Usually a vendor, client, contractor, any 3rd party

What can be shared with an External User?

- Whole **SharePoint Site**
- Specific **Folder**
- Specific **Document**

Who can share externally?

- Site **Owner/Administrator**
- Any User in the Site **Members** Group

HOW TO
SHARE A SITE

SHAREPOINTMAVEN @gregoryzelfond

To Share the whole site

STEP 1

Click **Share** Button in upper right-hand corner
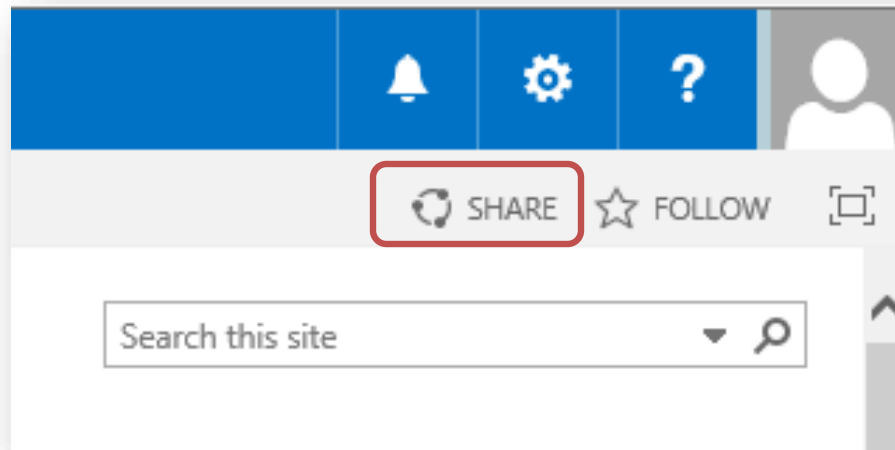
To Share the whole site, cont'd

STEP 2

Type in the email address of external user. The system will recognize that it is outside of the organization. Personal message is optional. Click **Share** Button
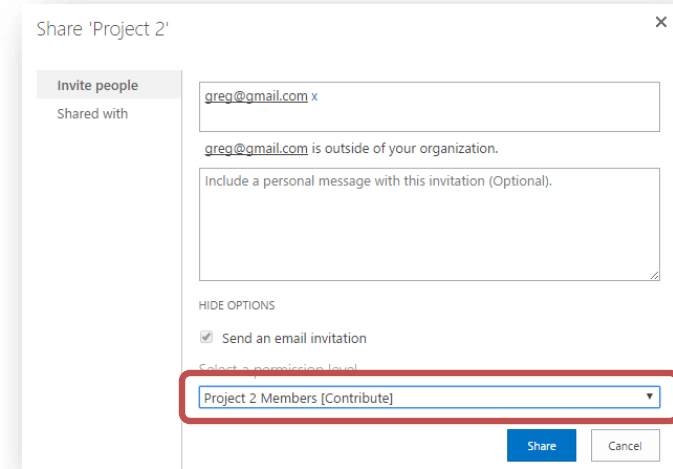
What permission will the external user get?

If shared by **Site Owner** (user with **Full Control**)

- Any permission level can be assigned by Site Owner (**Read, Contribute, Full Control**)
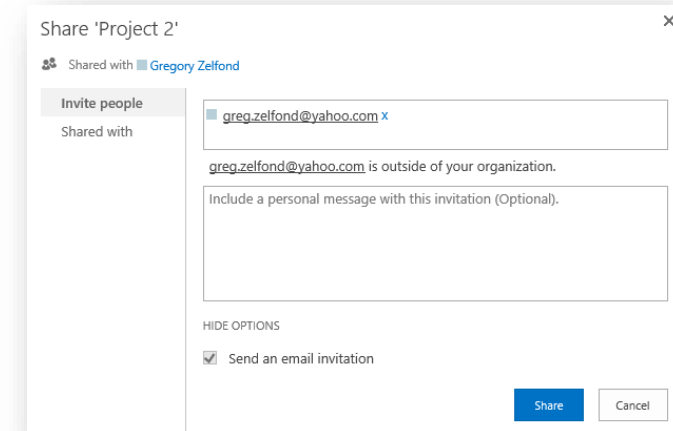
If shared by **Site Members**

- Same permission level as already assigned to the **Site Members Group**
  - Contribute ➔ Contribute
  - Read ➔ Read

Difference between external and regular user

Once you share your SharePoint Site with an external user, there is **very little difference** *between what you can do and what an external user can do. This means that:*

External Users can:

- Add/Edit/Delete documents, tasks, events, etc.
- Access all SharePoint Site Contents (Pages & Web Parts)
- Setup Alerts
- Share your SharePoint site with **other** external users

External Users cannot:

- Have their own OneDrive personal account
- Have their own User Profile/Delve page

What actually happens in the background...

Once you share your site with an External User and once External User accepts the request and logins, that user is physically added to the Site Members Group!!!
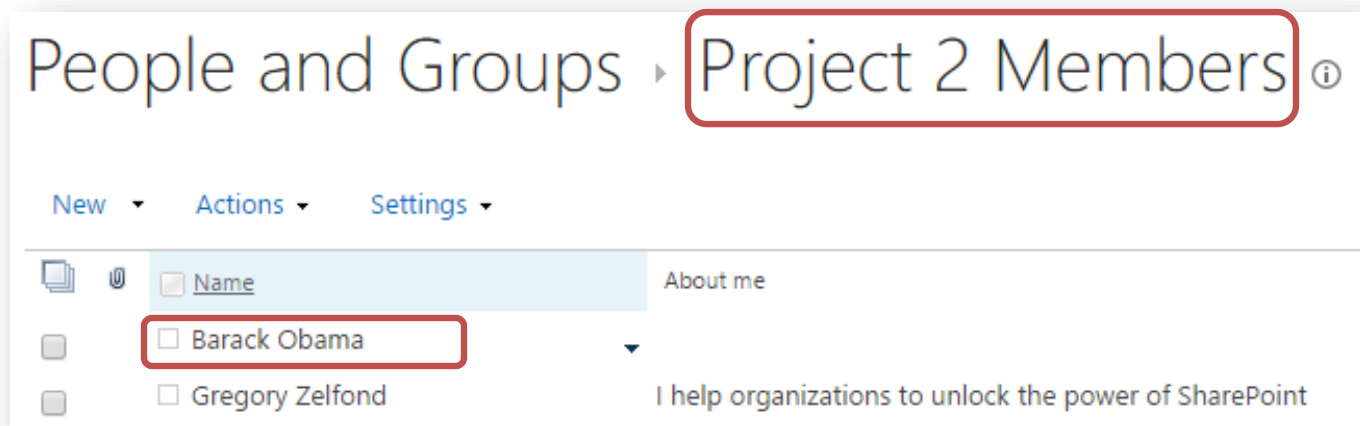
HOW TO SHARE A DOCUMENT OR FOLDER

Sharing Documents

- Sharing Documents & Folders is different from Sharing Sites

- Same instructions apply to sharing a folder as to sharing a document

To Share a Document

STEP 1

Click the check box next to document or folder.
Click on ellipsis (3 dots), then **Share** Button
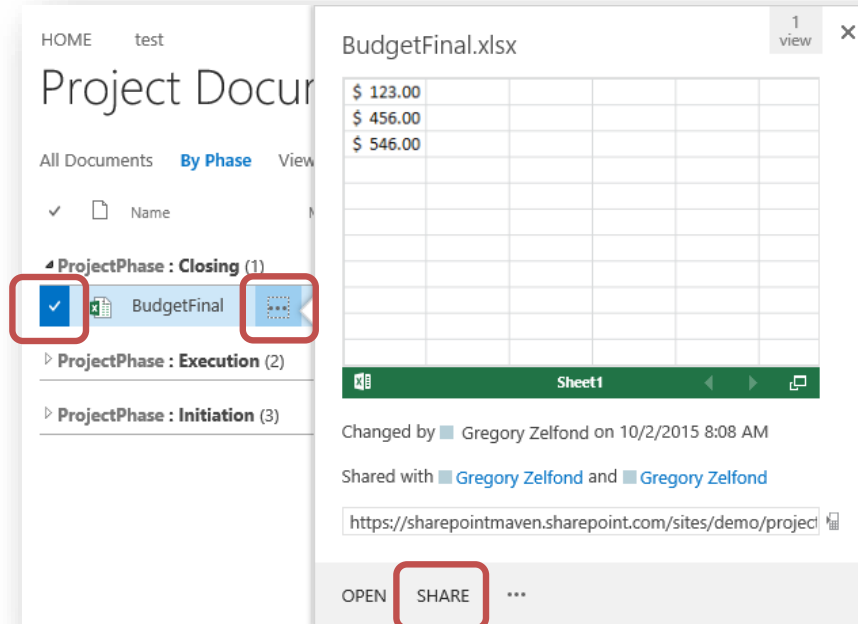
To Share a Document, cont'd

STEP 2

Type in the email address of an external user. The system will recognize that email is outside of the organization. Choose between **Can Edit** and **View** drop-down. Click **Share** Button

Anonymous Links

- Unlike Sites, individual documents can be shared **anonymously** (without requiring external user to login)

- Depends on how SharePoint External Sharing was configured by your IT Administrators

PLEASE DO NOT SHARE WITH ANONYMOUS LINKS FROM SHAREPOINT - USE ONEDRIVE FOR THIS INSTEAD!

What actually happens in the background...

Once you share your document or folder with an External User, the user will only get access to the specific file or folder you shared. User will not be able to access other files on the site, even in the same document library. However, if you shared a folder, all of its contents and subfolders will be shared!!!

- **Can Edit** – User Can Edit Document Online
- **View** – User can read/download document, but **can't edit**

EXTERNAL USER EXPERIENCE

What External User has to do

STEP 1

External User receives an email about site or document/folder shared. User clicks a link

STEP 2

External User has to choose between authenticating with **Microsoft Account** and **Organizational Account**
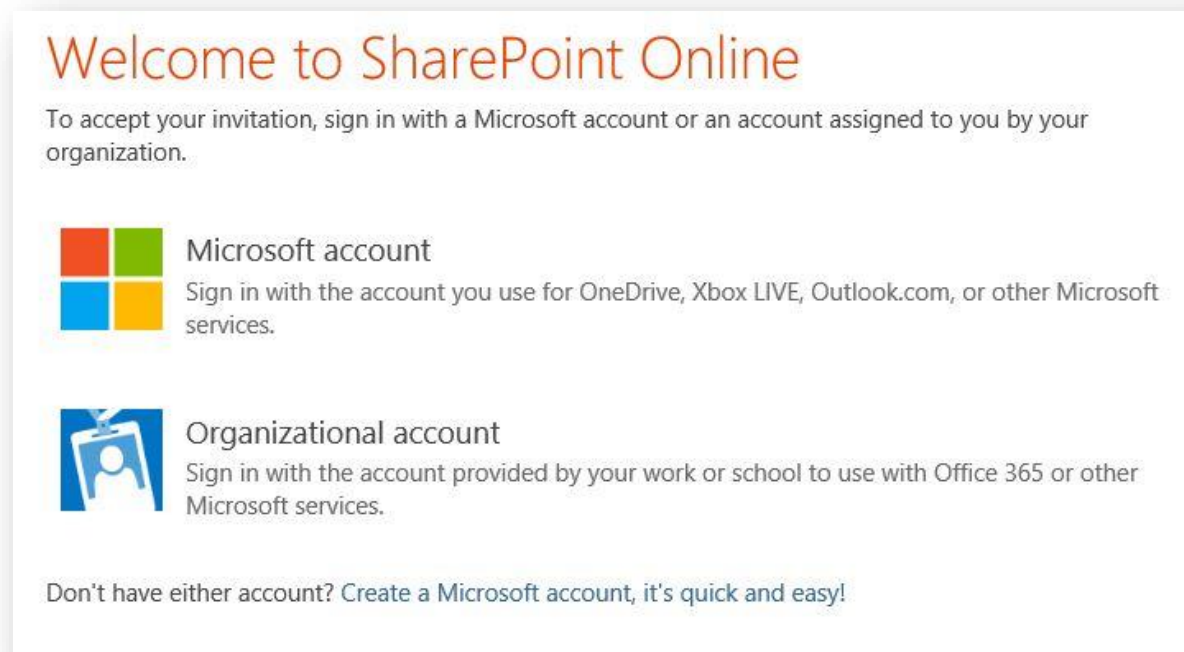
Difference between accounts

- **Microsoft account**
  - Any Microsoft domain account (For example: user@hotmail.com, user@live.com, user@outlook.com)
  - You can login with any personal accounts above

- **Organizational Account**
  - Some other Office 365 account
  - If you have **Company A Office 365 account**, you can access **Company B SharePoint sites** with your **Company A Office 365 credentials** (of course if site/documents have been shared with you)

STEP 3

External User logs in using account chosen in previous Step (example below shows Microsoft Account)
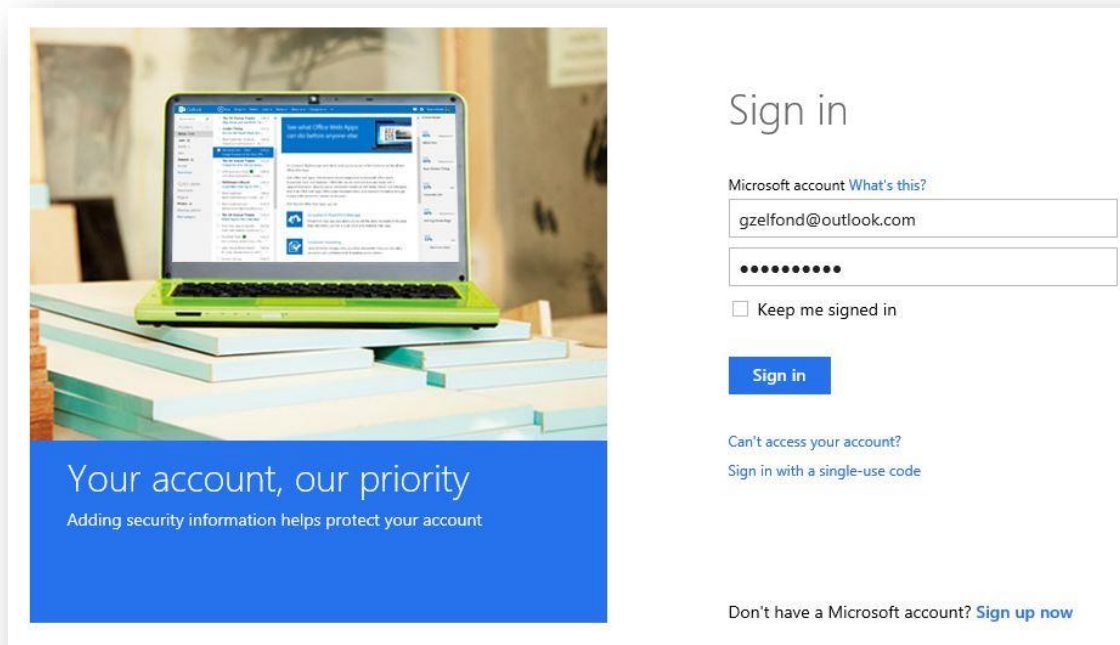
No Account? No problem!

- Users can also create an account "on the fly"

CONFIGURE EXTERNAL SHARING

Here is the fun part...

There are 3 places where you need to configure External Sharing

- **Tenant Level** – settings control external sharing for ALL site collections

- **Site Collection Level** – settings control external sharing for specific site collection

- **Site Level** – settings control (external) sharing for specific site

Tenant Level

STEP 1

Office 365 Admin Center > External Sharing > Sharing Overview
Switch "Let external people access your sites" **On** or **Off**
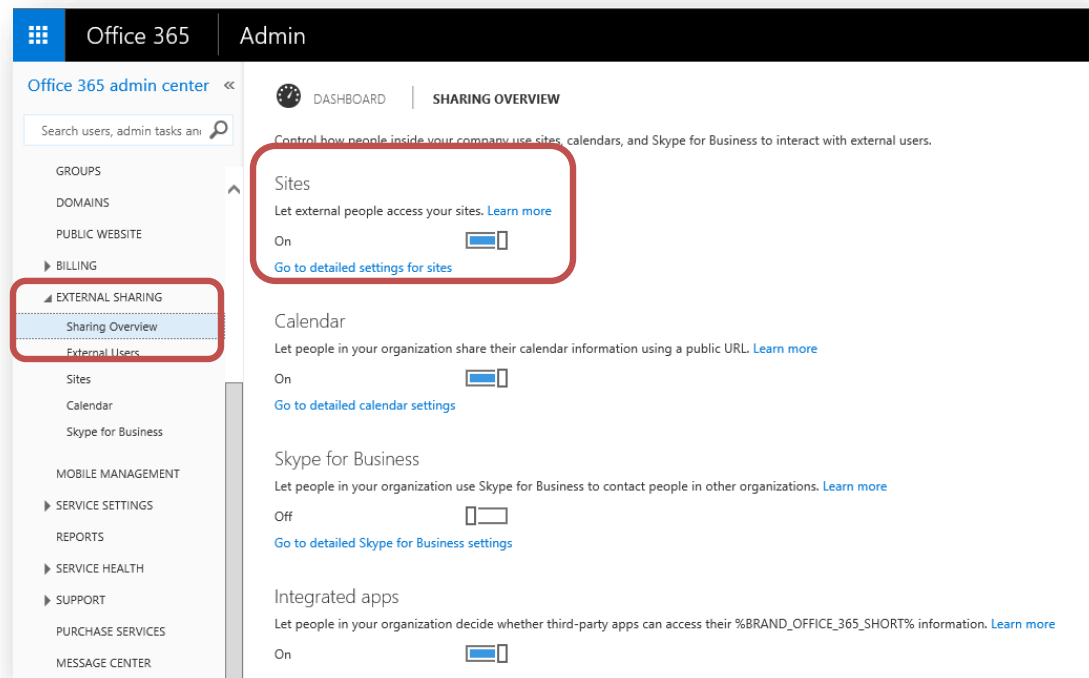
Tenant Level, cont'd

STEP 2

Office 365 Admin Center > External Sharing > Sites
Allow or disallow anonymous guest links by clicking appropriate radio button

Site Collection Level

STEP 1

Office 365 Admin Center > Admin > SharePoint
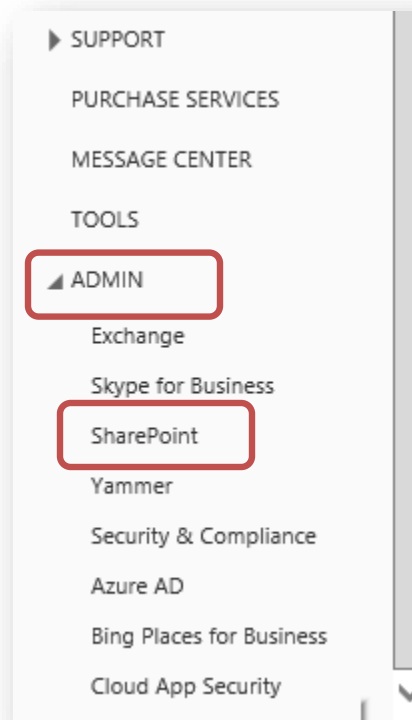
Site Collection Level, cont'd

STEP 2

SharePoint Admin Center > Site Collections

Check the **box** next to the site collection, then click **Sharing**

Site Collection Level, cont'd

STEP 3

Choose between **3 levels** of External Sharing. Click **Save**
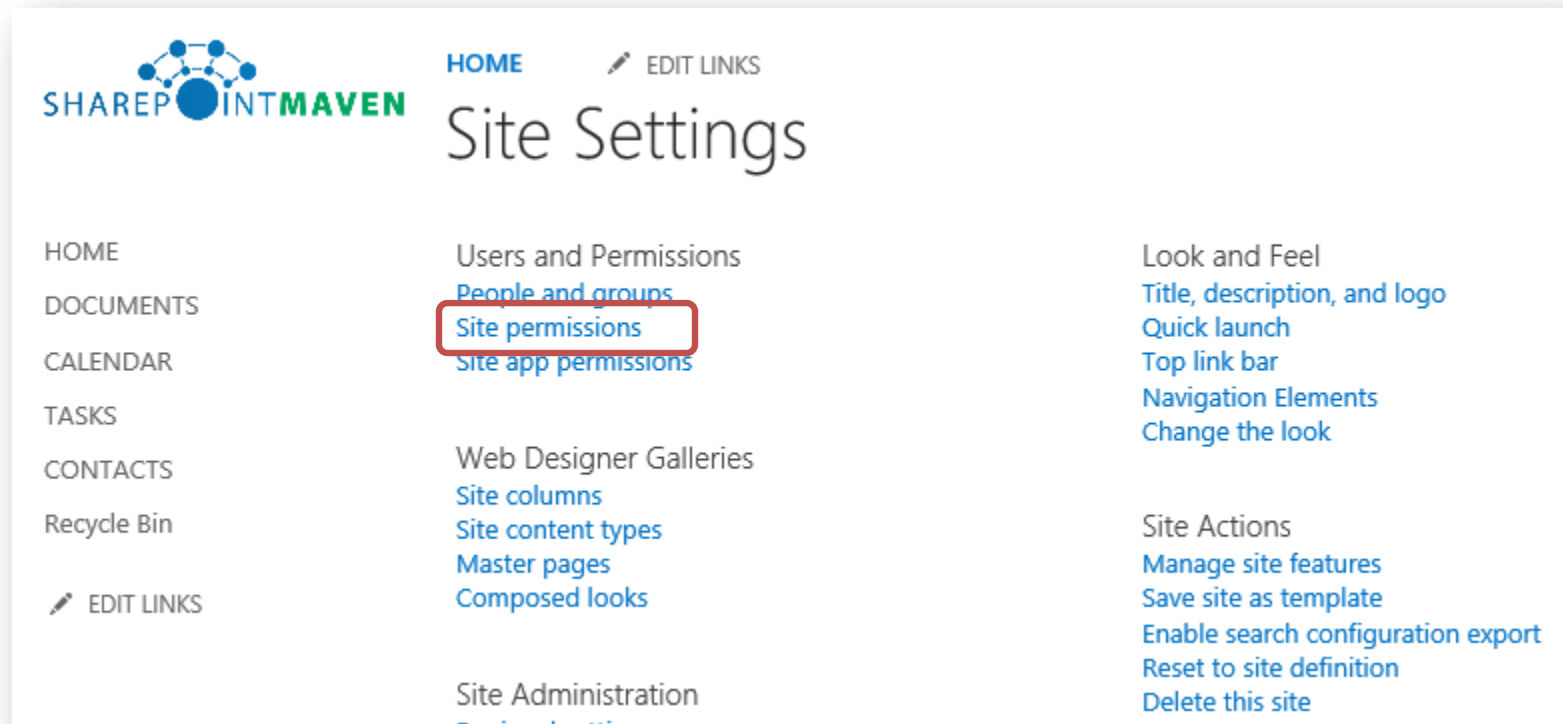
Site Level

STEP 1

Gear Icon > Site Settings
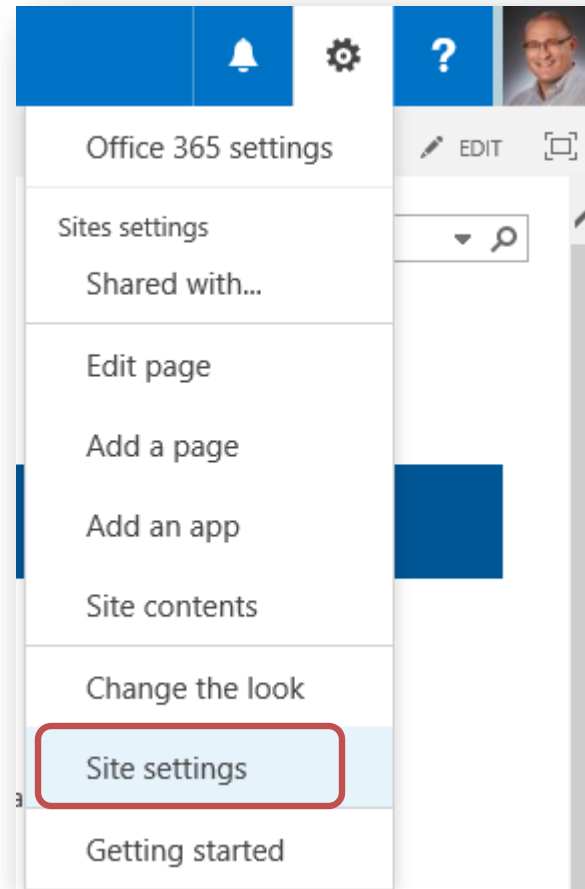
Site Level, cont'd

STEP 2
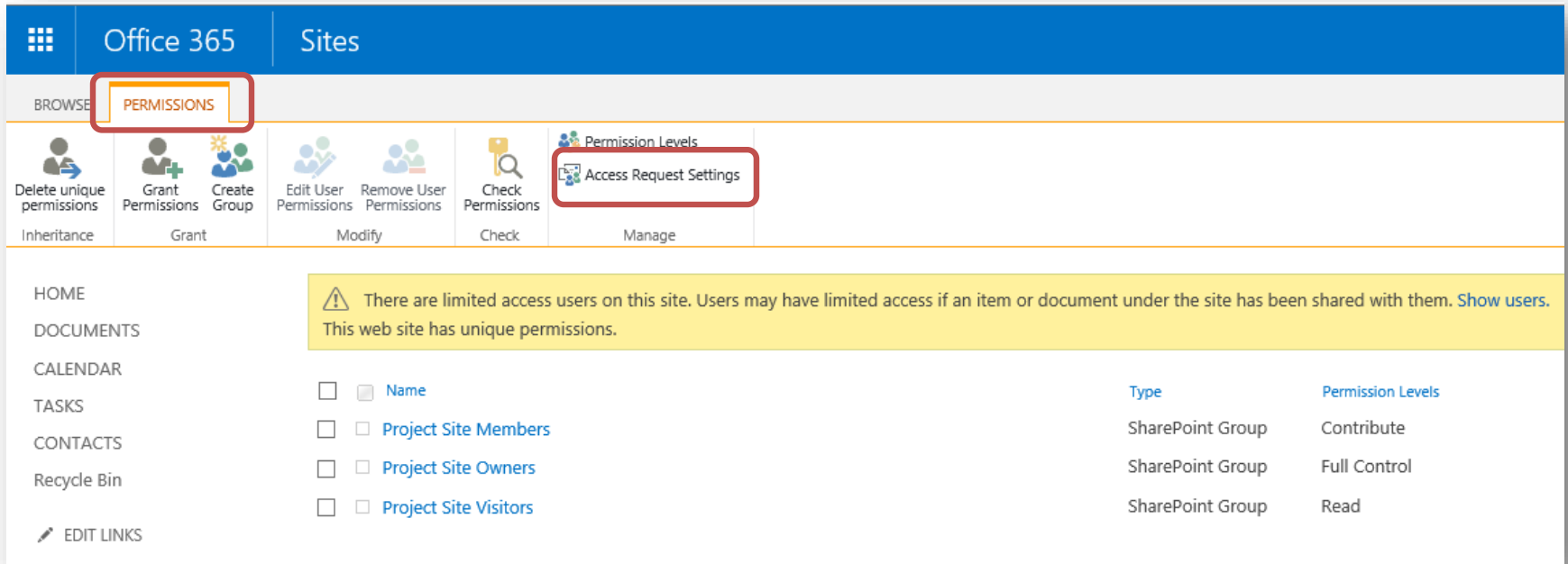
Users and Permissions > Site permissions

Site Level, cont'd

STEP 3

Permissions Tab > **Access Request Settings**

Site Level, cont'd

STEP 4

Make sure corresponding check boxes are checked

Allow members to share the site and individual files and folders
If unchecked – users will not be able to share anything

Allow members to invite others to the site members group
If unchecked – users will be able to share files and folders, but not the whole site

Review Sharing Requests & History

- Site Settings > Access requests and invitations

A piece of wisdom

Best Practice

- Put all your content that is meant for external sharing in a **separate** site collection *(create new site collection **specifically** for external sharing)*

- This way you can turn External Sharing **OFF** at your **Intranet** Site Collection and **ON** at External Site Collection

- Reference [this blog post](#) for more info

REMOVE
EXTERNAL USERS

What actually happens in the background…

Once you **share** your site or document with an External User and once External User **accepts** the request and logins, that user gets a profile in your SharePoint environment

Account field contains email address used to access the sites/documents
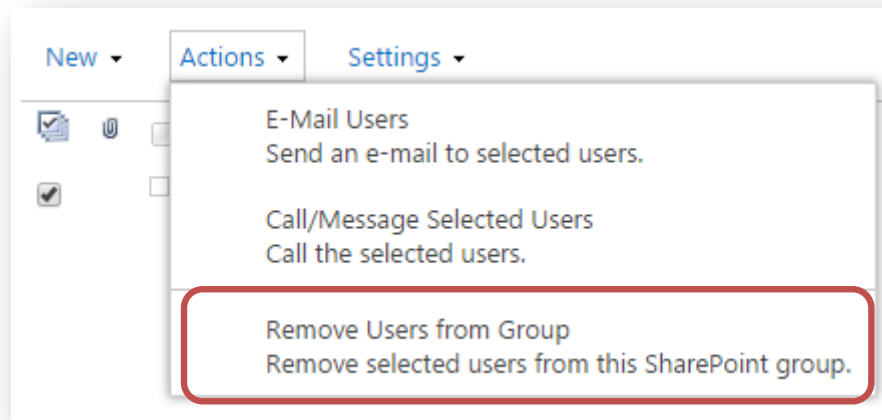
Work email field contains email used to share the site/document with the external user

Remove External User from Site

STEP 1

If you shared whole site with external user, remove that user from the [*Members*] Security Group

STEP 2

If you shared individual file or folder with an external user, click Share > Shared with > STOP SHARING

SITE COLLECTION ADMIN
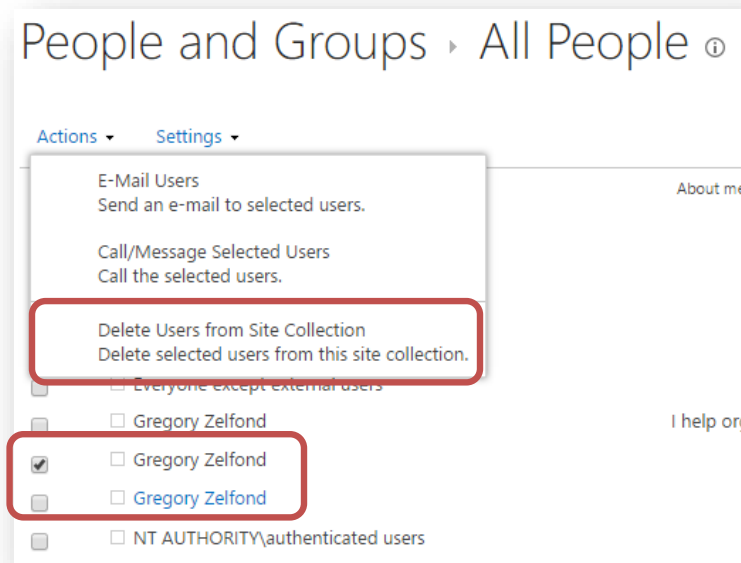
Add the following string at the end of your Site Collection URL
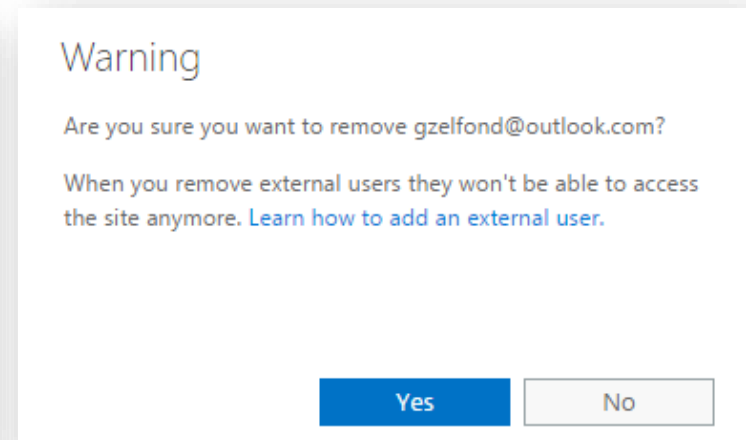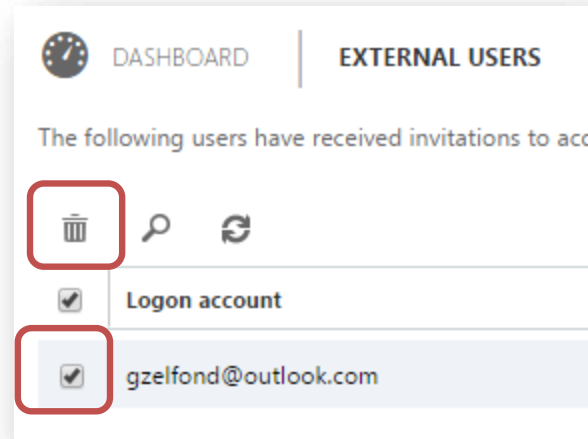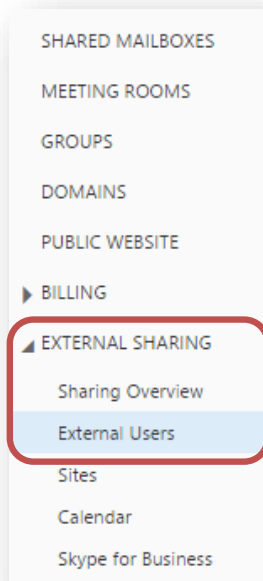https://companyname.sharepoint.com/_layouts/15/people.aspx?MembershipGroupId=0

List of all users (internal/external) will be displayed. Remove users as needed

Remove External User from the Whole Tenant

SITE COLLECTION ADMIN

1. **Go to Office 365 Admin Center**

2. **External Sharing > External Users**

3. **Remove External User(s)**

Need help with SharePoint?

- SharePoint Site Configuration and Customization

- Document Migration to SharePoint

- SharePoint Implementation Strategy

- SharePoint Training

- SharePoint User Adoption

- SharePoint Governance

- SharePoint Project Management

THANK YOU!

Get in touch if you have questions

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