

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

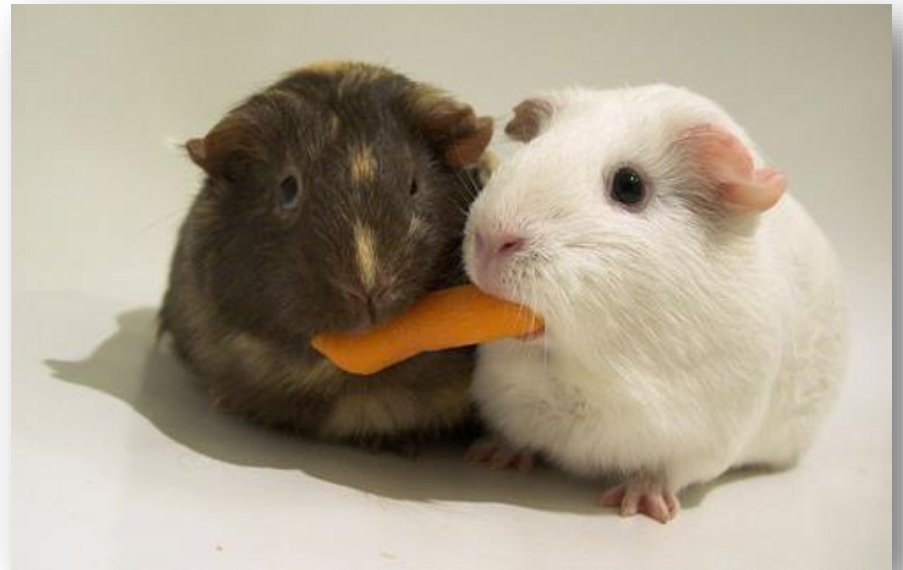
Who is an External User in SharePoint?

- 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



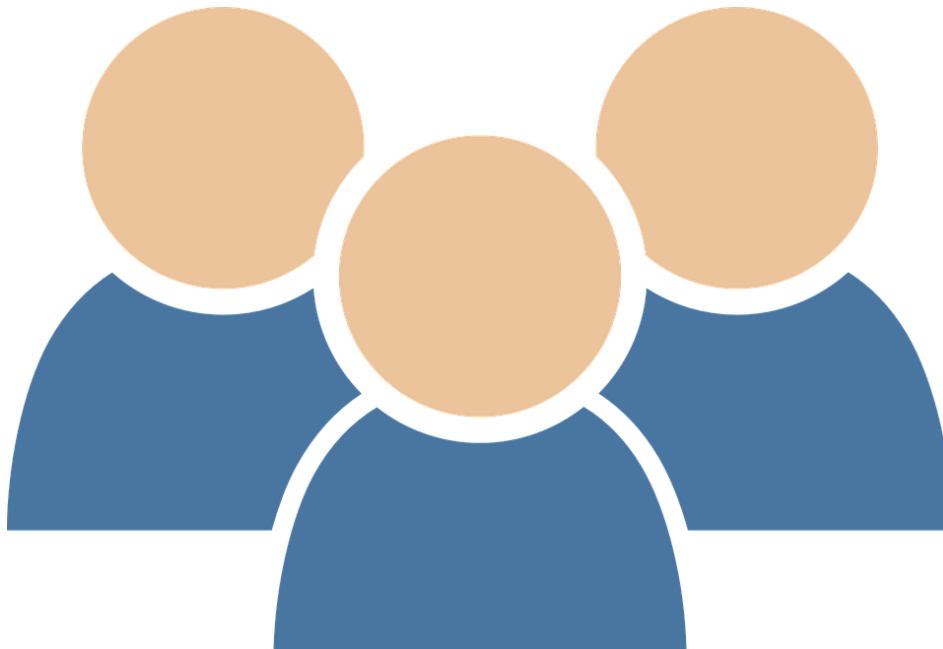
What can be shared with an External User?

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



Who can share externally?

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

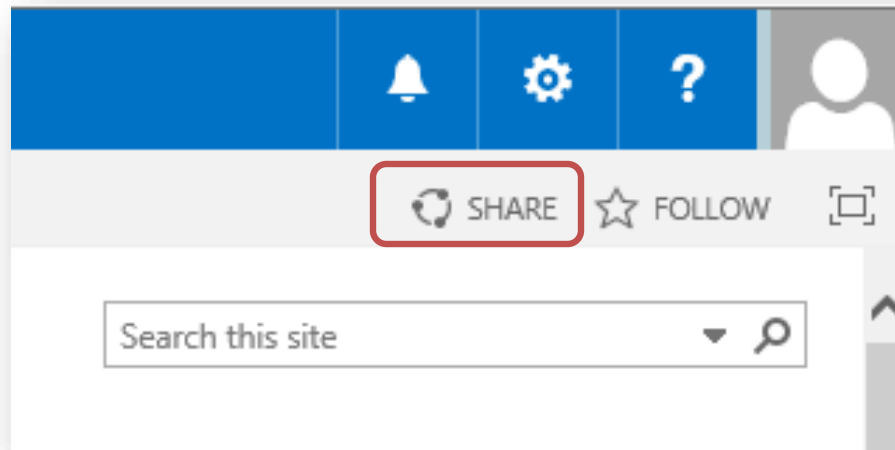


HOW TO SHARE A SITE

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

Share 'Project 2'

Shared with Gregory Zelfond and Gregory Zelfond

Invite people

Shared with

greg@gmail.com x

greg@gmail.com is outside of your organization.

Include a personal message with this invitation (Optional).

HIDE OPTIONS

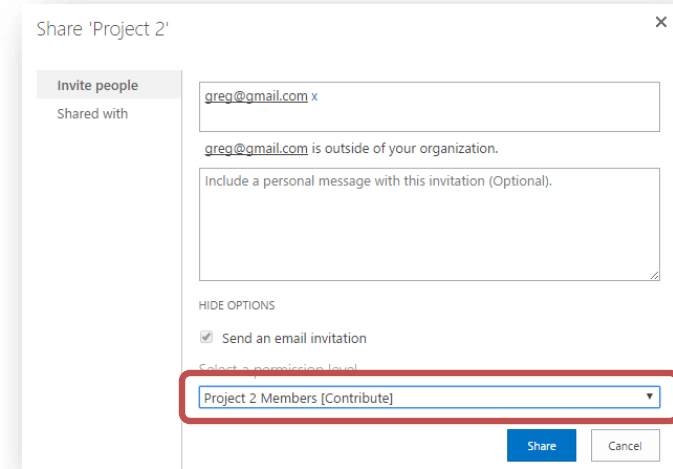
☒ Send an email invitation

Share Cancel

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**)



Share 'Project 2'

Invite people
Shared with

greg@gmail.com x

greg@gmail.com is outside of your organization.

Include a personal message with this invitation (Optional).

HIDE OPTIONS

☒ Send an email invitation

Select a permission level

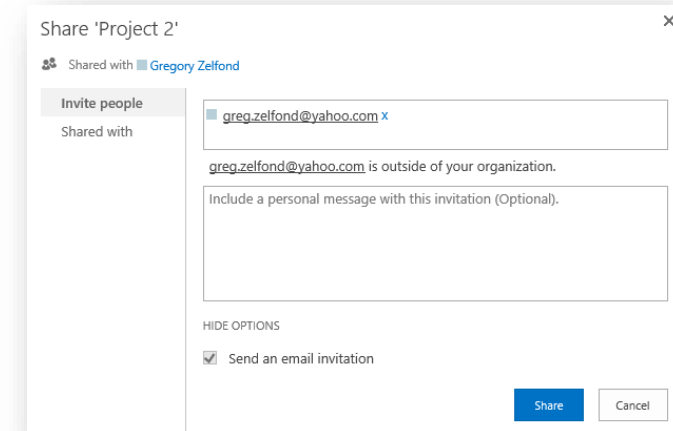
Project 2 Members [Contribute]

Share Cancel

If shared by **Site Members**

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

- Contribute → Contribute
- Read → Read



Share 'Project 2'

Shared with Gregory Zelfond

Invite people
Shared with

greg.zelfond@yahoo.com x

greg.zelfond@yahoo.com is outside of your organization.

Include a personal message with this invitation (Optional).

HIDE OPTIONS

☒ Send an email invitation

Share Cancel

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:

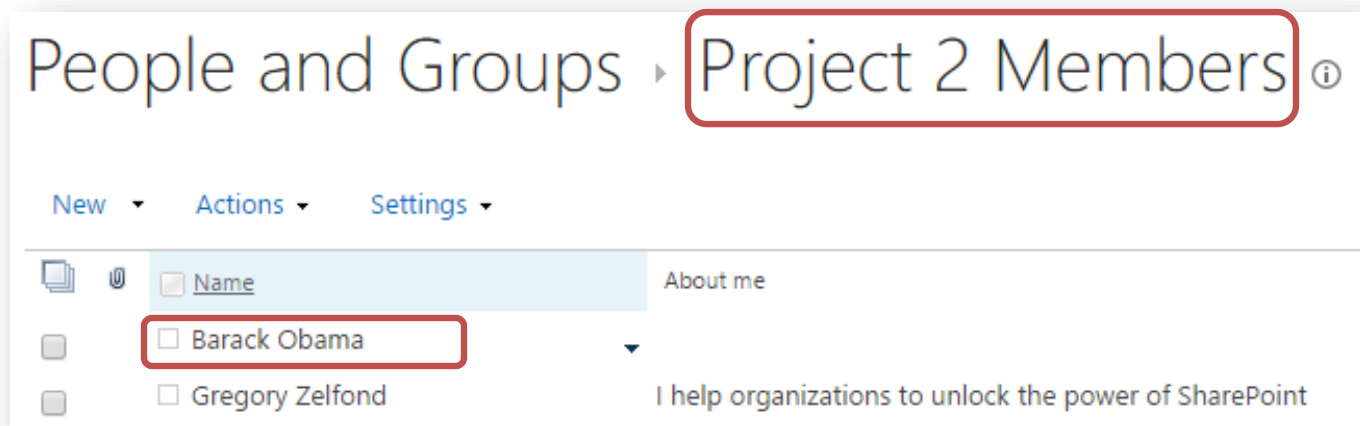
- Add/Edit/Delete documents, tasks, events, etc.
- Access all SharePoint Site Contents (Pages & Web Parts)
- Setup Alerts
- Share your SharePoint site with **other** external users

■ 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 logs in, that user is physically added to the **Site Members** Group!!!



HOW TO SHARE A DOCUMENT OR FOLDER

Sharing Documents

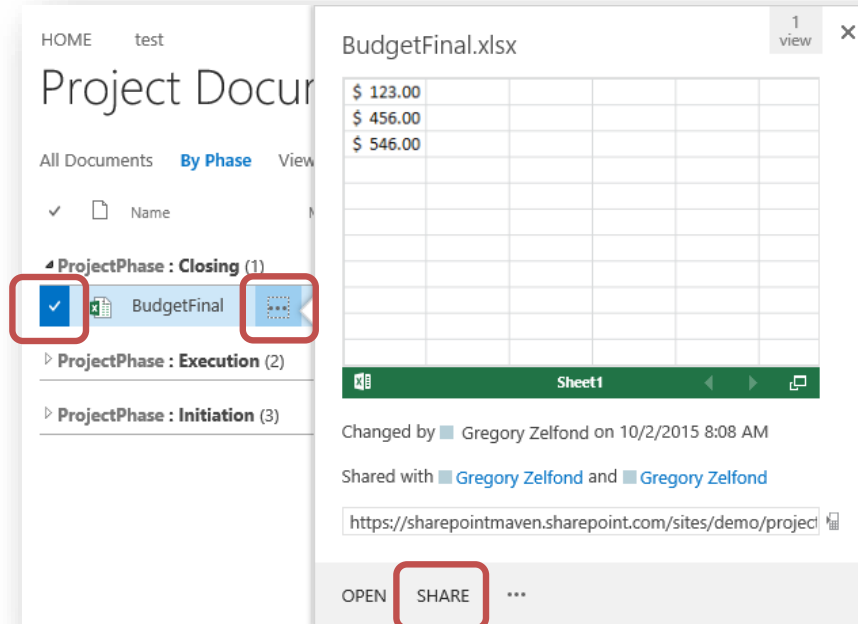
- Sharing Documents & Folders is different from Sharing Sites
- Same instructions apply to sharing a folder as to sharing a document



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

The screenshot shows the 'Share' dialog box for a document titled 'BudgetFinal'. The dialog is titled 'Share 'BudgetFinal'' and has a close button (X) in the top right corner. Below the title, it says 'Shared with Gregory Zelfond and Gregory Zelfond'. On the left side, there are three options: 'Invite people' (selected), 'Get a link', and 'Shared with'. In the 'Invite people' section, there is a text input field containing 'greg@gmail.com' with a small 'x' icon to its right. To the right of this field is a dropdown menu currently set to 'Can edit'. Below the input field, a message states 'greg@gmail.com is outside of your organization.' Below this message is a text area for a personal message with the placeholder text 'Include a personal message with this invitation (Optional)'. At the bottom left, there is a section titled 'HIDE OPTIONS' with a checked checkbox labeled 'Send an email invitation'. At the bottom right, there are two buttons: 'Share' and 'Cancel'. Red boxes highlight the email input field, the dropdown menu, the external user notification, and the '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!!!

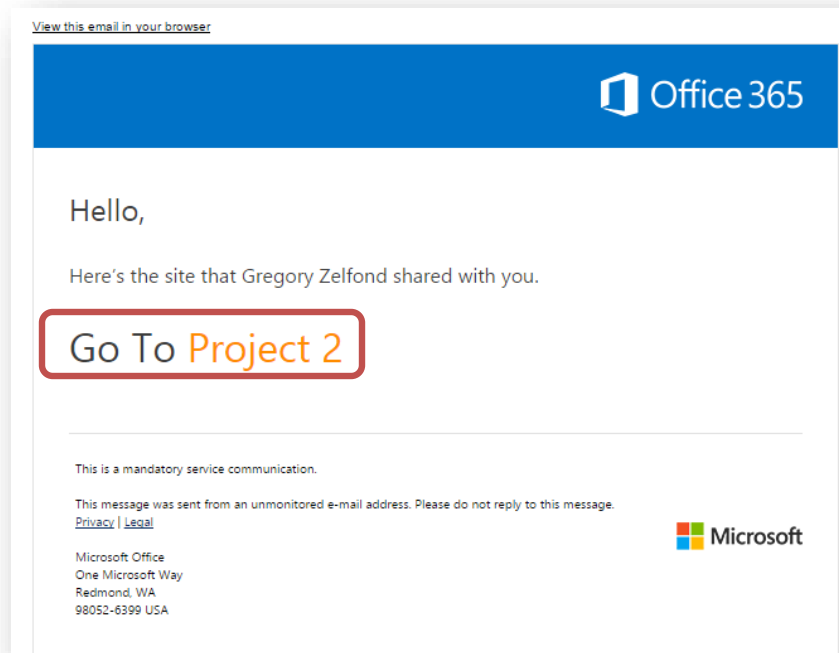
- **Can Edit** – User Can Edit Document Online
- **View** – User can read/download document, but **can't edit**

EXTERNAL USER EXPERIENCE

What External User has to do

STEP 1

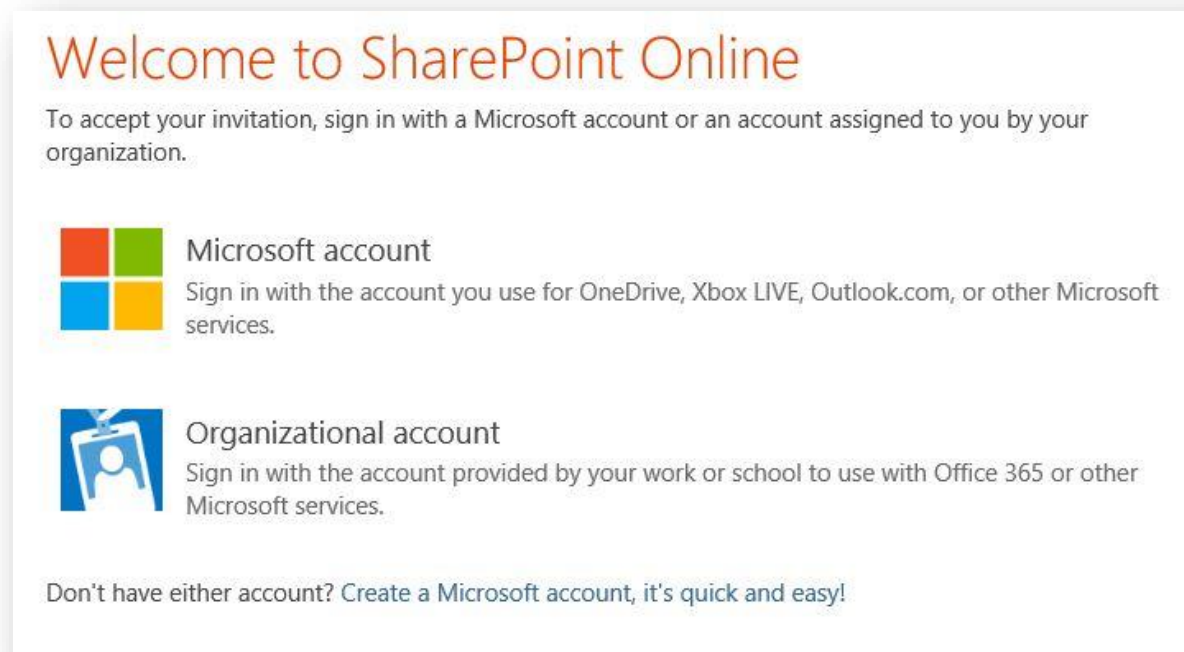
External User receives an email about site or document/folder shared. User clicks a link



What External User has to do, cont'd

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

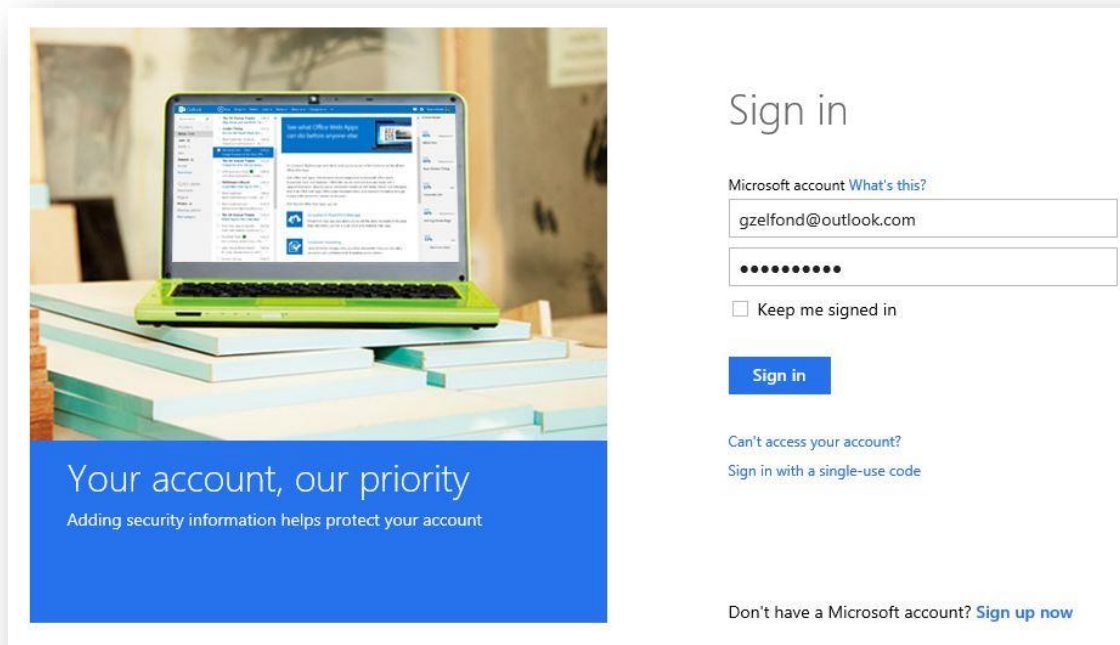
■ Organizational Account

- 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)

What an External User has to do, cont'd

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”

Welcome to SharePoint Online

To accept your invitation, sign in with a Microsoft account or an account assigned to you by your organization.



Microsoft account

Sign in with the account you use for OneDrive, Xbox LIVE, Outlook.com, or other Microsoft services.



Organizational account

Sign in with the account provided by your work or school to use with Office 365 or other Microsoft services.

Don't have either account? [Create a Microsoft account, it's quick and easy!](#)



Create account

Microsoft account opens a world of benefits.

☒ Send me promotional emails from Microsoft

[Use a phone number instead](#)

[Get a new email address](#)

Choosing **Next** means that you agree to the [Microsoft Services Agreement](#) and [privacy and cookies statement](#).

Next

Microsoft

CONFIGURE EXTERNAL SHARING

Here is the fun part...

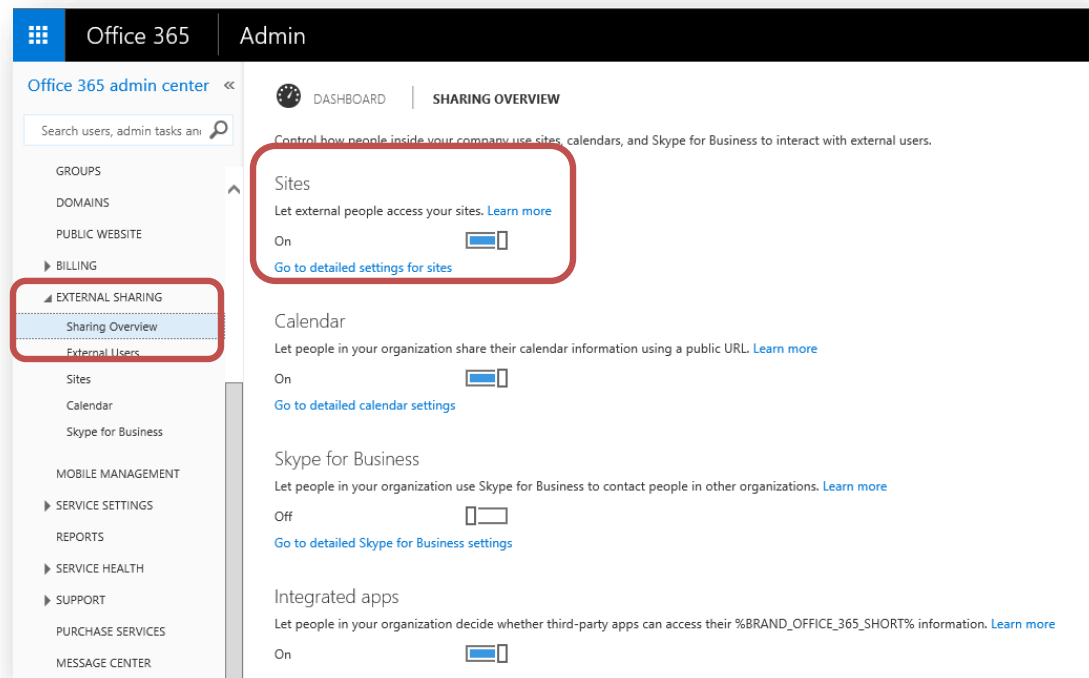
There are 3 places where you need to configure External Sharing

- **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

Office 365 Admin Center > External Sharing > Sites

Let external people access your sites. [Learn more](#)

☒ Let external people access your sites. [Learn more](#)

☐ No anonymous guest links. Only allow sharing with authenticated users.

☒ Allow sharing with anonymous guest links for your sites and documents.

Save

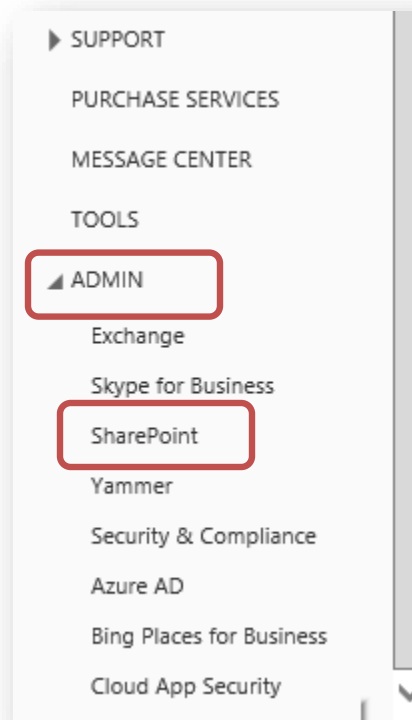
Select the site or multiple sites you want to manage, and then click Edit.

Site URL	Site type	Sharing settings
<input type="checkbox"/> https://sharepointmaven.sharepoint.com/	Private Site Collection	Not allowed
<input type="checkbox"/> https://sharepointmaven.sharepoint.com/portals/community	Private Site Collection	Not allowed
<input type="checkbox"/> https://sharepointmaven.sharepoint.com/portals/hub	Private Site Collection	Not allowed
<input type="checkbox"/> https://sharepointmaven.sharepoint.com/search	Private Site Collection	Not allowed
<input type="checkbox"/> https://sharepointmaven.sharepoint.com/sites/5000limitesting	Private Site Collection	Not allowed

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**

Office 365 | Admin

SharePoint admin center

site collections

infopath

user profiles

bcs

term store

records management

search

secure store

apps

settings

configure hybrid

Site Collections

New Delete Properties Owners **Sharing** Storage Quota Buy Storage Server Resource Quota Upgrade Project Web App Recycle Bin Restore

Search by URL...

0.99 TB available of 1.00 TB

<input type="checkbox"/> URI	STORAGE USED (GB)
<input checked="" type="checkbox"/> https://sharepointmaven.sharepoint.com	0.00
https://sharepointmaven.sharepoint.com/portals/community	0.03
https://sharepointmaven.sharepoint.com/portals/hub	0.00
https://sharepointmaven.sharepoint.com/search	0.03
https://sharepointmaven.sharepoint.com/sites/5000limitesting	14.24
https://sharepointmaven.sharepoint.com/sites/CompliancePolicyCenter	0.00
https://sharepointmaven.sharepoint.com/sites/demo	0.06
https://sharepointmaven.sharepoint.com/sites/documentmanagement	0.06

Site Collection Level, cont'd

STEP 3

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

sharing

Sharing outside your company
Control how users invite people outside your organization to access content

☒ Don't allow sharing outside your organization

☐ Allow external users who accept sharing invitations and sign in as authenticated users

☐ Allow sharing with all external users, and by using anonymous access links

Allowing non-owners to invite new users

Status: Allowed. This is the default setting for new sites.	Some sites in this site collection allow non-owners to grant permission to files, folders, or sites and sub-sites without requiring owner approval. Learn more Turn off sharing for non-owners on all sites in this site collection.
---	---

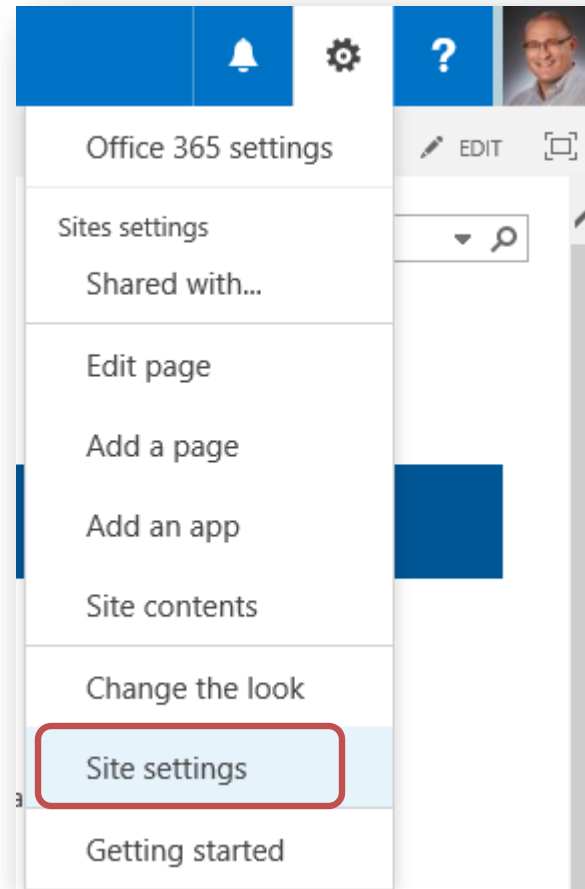
Changes will be applied to the following 1 site collections:

URL	SHARING
https://sharepointmaven.sharepoint.com	Not allowed

Site Level

STEP 1

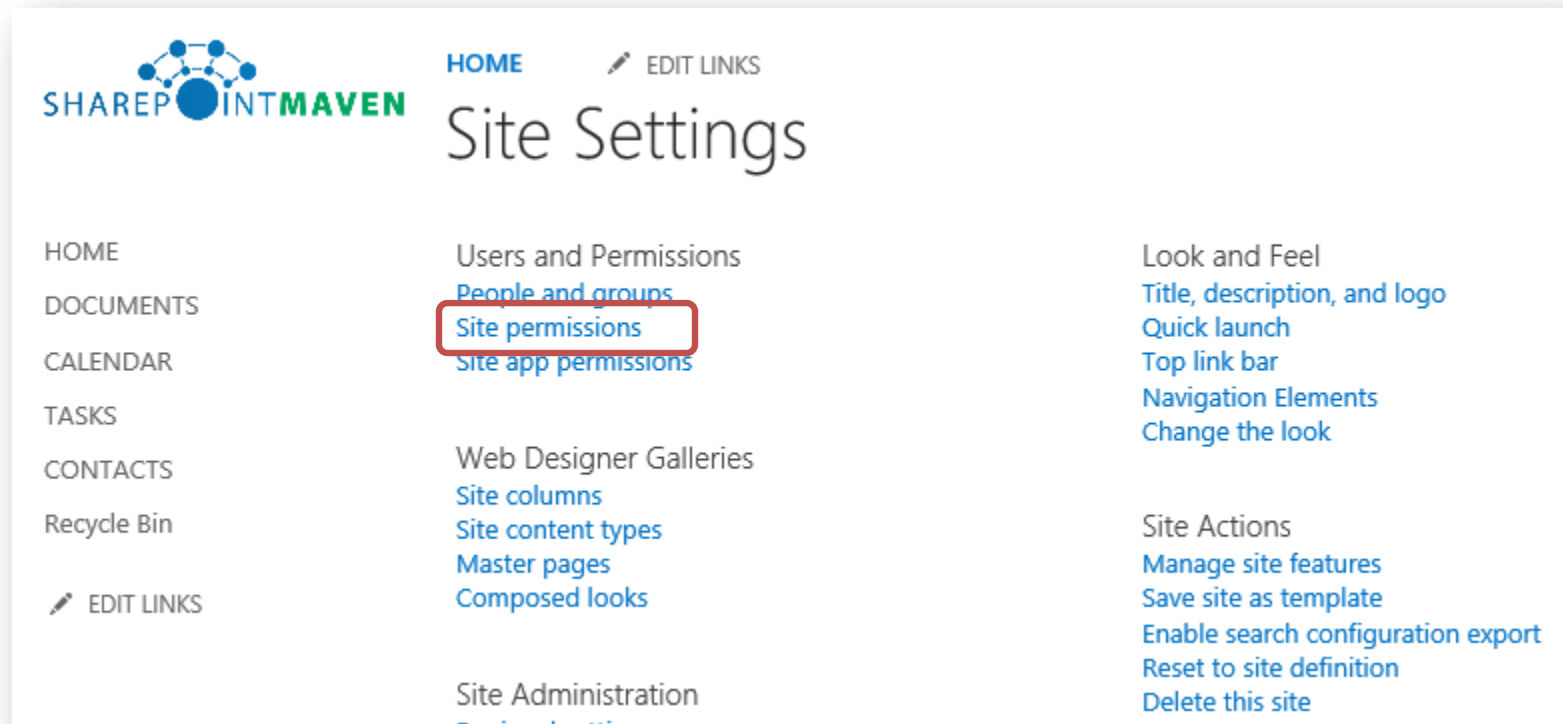
Gear Icon > Site Settings



Site Level, cont'd

STEP 2

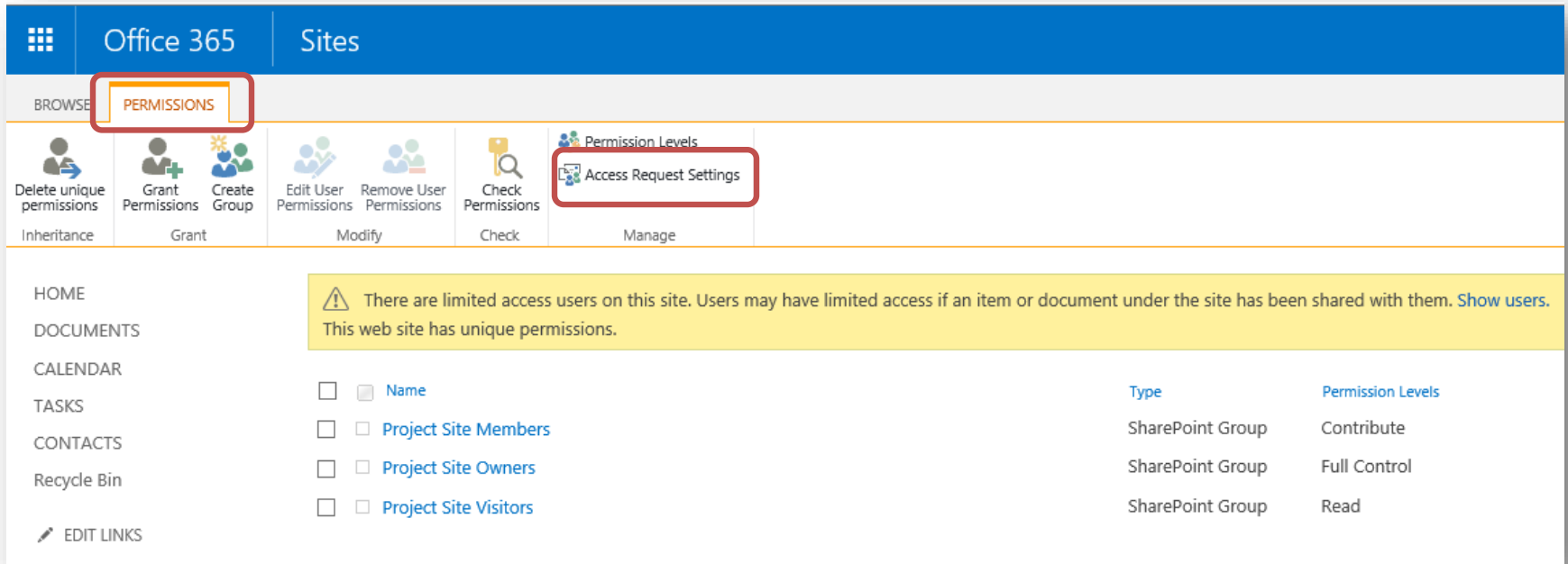
Users and Permissions > Site permissions



Site Level, cont'd

STEP 3

Permissions Tab > Access Request Settings



The screenshot shows the SharePoint 'PERMISSIONS' tab interface. The 'PERMISSIONS' tab is selected and highlighted with an orange box. Below it, the 'Access Request Settings' option is highlighted with a red box. The interface includes a left sidebar with navigation links (HOME, DOCUMENTS, CALENDAR, TASKS, CONTACTS, Recycle Bin, EDIT LINKS) and a main content area. The main content area features a warning message about limited access users and a table of permission levels.

Name		Type	Permission Levels
<input type="checkbox"/>	Project Site Members	SharePoint Group	Contribute
<input type="checkbox"/>	Project Site Owners	SharePoint Group	Full Control
<input type="checkbox"/>	Project Site Visitors	SharePoint Group	Read

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

Access Requests Settings

Access Requests Settings
Choose who can request access or invite others to this site.

☒ Allow members to share the site and individual files and folders.
☒ Allow members to invite others to the site members group, Project Site Members. This setting must be enabled to let members share the site.

☒ Allow access requests
Send all requests for access to the following e-mail address:
greg@sharepointmaven.com

OK Cancel

Review Sharing Requests & History

- Site Settings > Access requests and invitations

Site Settings

- Users and Permissions
- People and groups
- Site permissions
- Access requests and invitations**
- Site app permissions

Access Requests ⓘ

PENDING REQUESTS

Person	Request for	Requested on	Approve/Decline
Gregory Zelfond	... Project 3	April 18	Declined (change)

EXTERNAL USER INVITATIONS

Person	Permission	Requested on	Status	Request for
greg.zelfond@yahoo.com	... Contribute	A few seconds ago	Pending(Expires in 90 days)	Project Budget

HIDE HISTORY

HISTORY

Person	Permission	Requested on	Status	Request for
greg.zelfond@yahoo.com	... Project 3 Members [Contribute]	April 18	Accepted by Gregory Zelfond	Project 3

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 logs in, that user gets a profile in your SharePoint environment

Account field contains email address used to access the sites/documents

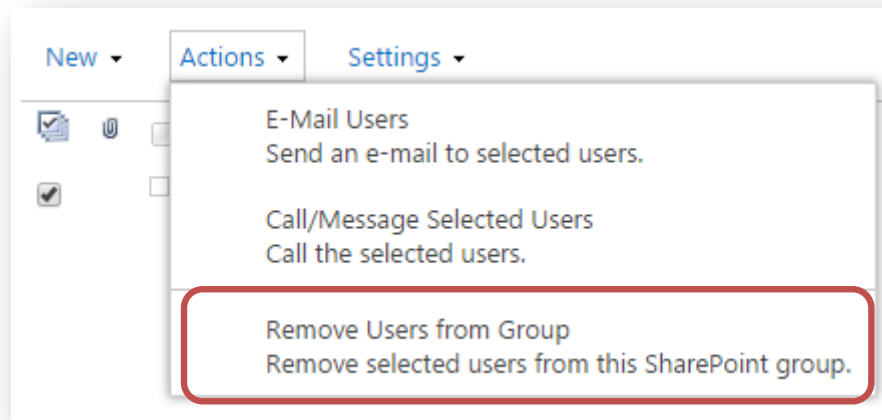
Work email field contains email used to share the site/document with the external user

The screenshot shows a SharePoint 'User Information' form for 'Project 3'. The form is titled 'People and Groups > User Information' and has a 'Close' button in the top right. On the left is a navigation pane with links: Home, Notebook, Documents, Recent, Sass, CoolProjectTaskList, Site Contents, and Recycle Bin. The main content area has a header with 'Edit Item', 'My Language And Region', and 'My Alerts'. Below this is a list of fields: Account, Name, Work email, Mobile phone, About me, Picture, Department, Title, SIP Address, First name, Last name, Work phone, User name, Web site, Ask Me About, Office, Picture Timestamp, Picture Placeholder State, and Picture Exchange Sync State. The 'Account' field contains the text 'i:0#.fjmembership|gzelfond_outlook.com#ext#@sharepointmaven.com' and is highlighted with a red box. The 'Work email' field contains the text 'greg.zelfond@yahoo.com' and is also highlighted with a red box. At the bottom of the form, it says 'Created at 4/18/2016 10:26 PM by ☐ System Account' and 'Last modified at 4/18/2016 10:26 PM by ☐ System Account', with another 'Close' button on the right.

Remove External User from Site

STEP 1

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



Remove External User from Document or Folder

STEP 2

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



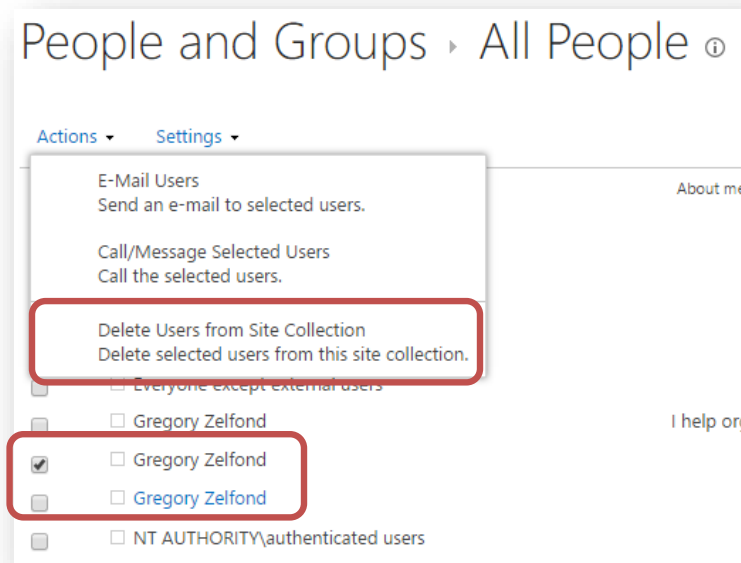
Remove External User from Site Collection

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

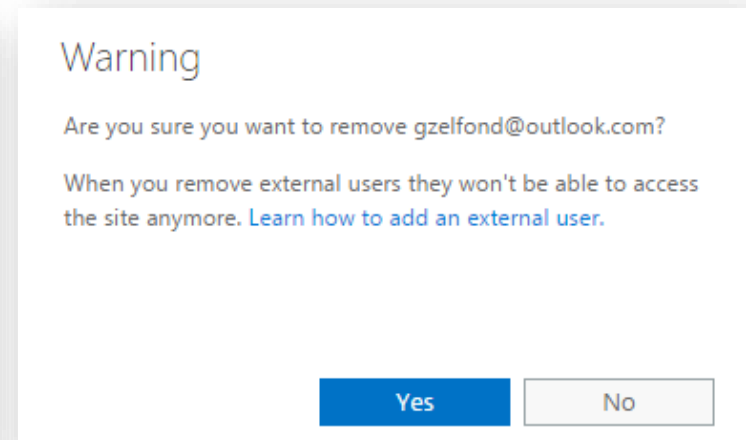
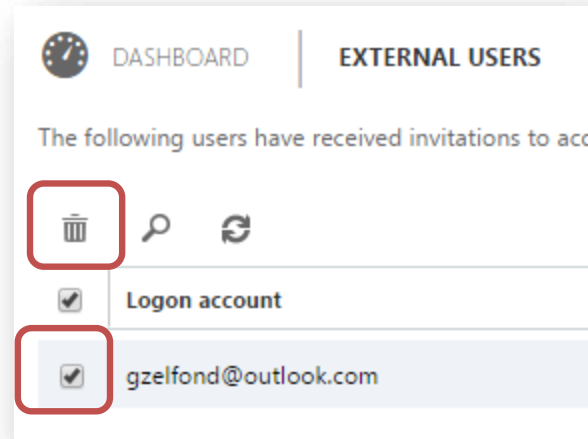
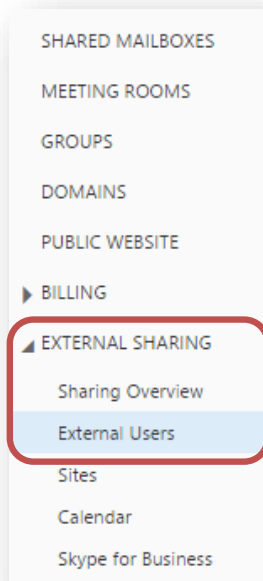
List of all users (internal/external) will be displayed. Remove users as needed



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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