

Getting the Most from External Sharing of Documents in SharePoint Online

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The Business Case

- For users
 - SharePoint functionality (version history, co-authoring, etc.) is an expectation these days
 - Communication with vendors, clients, third parties is limited to email
 - Quicker feature release with SPO compared to on-prem
 - Recipient's software can be irrelevant
 - Sharing large files securely becomes easier
 - SPO supports 10-GB file sizes (and that's a soft limit)
<http://tinyurl.com/SPUseLimits>
- For IT
 - Minimal IT support for SharePoint Online content
 - Version of Office can be made irrelevant
 - No need to deal with on-prem system access for external users
 - Users can self-support more (provide an internal blog or resource that covers common requests, issues, etc. and point them to that when issues arise)
 - Fewer email storage issues

The Information Architecture

- Options
 1. Hybrid 1: Intranet and team spaces on-prem, plus externally shared SPO site collection specifically for sharing
 2. Hybrid 2: Intranet on-prem, protected collab spaces in SPO, plus externally shared SPO site collection specifically for sharing

3. Cloud 1: Intranet and team spaces in protected SPO site collections, plus externally shared SPO site collection specifically for sharing
 4. Cloud 2: Intranet in protected SPO site collections, collab spaces in shareable site collections
 5. Cloud 3: All SharePoint content in shareable site collections
- Don't forget about OneDrive: you can share content from there, including anonymously if desired
 - Best practice is to keep externally shared content in a separate site collection just for that content
 - The more externally shared content, the greater risk your intellectual property can leak outside your system
 - Think about whether you want to allow anonymous link sharing. Anyone with the link can access the content.
 - Share folders. It's just easier.

The Technology

- Enabling external sharing <http://bit.ly/2g6byyy>
 - Must enable external sharing at the tenant level first
 - Must enable external sharing at the site collection level next
 1. You choose which site collections will share
 - Must enable sharing by users within a site (likely already enabled)
- How to share at the user level is covered here <http://bit.ly/2gbH7XR>
 - Site owners (full control): can provide read, contribute, or full control, etc. access to external users
 - Site members: can provide same access that the member has to external users
 - The new user is now a member of the members group and will show up as an option when typing in the name of a user to share with (the system *knows* the user)
- How external users work
 - Options for creating them
 1. Recipient logs in with an existing O365 work/school account. This should always be the first option.
 - You can't create a Microsoft account based on an existing O365 account
 - The user is already licensed and active in O365
 - Sharer must send to the account

- This is confusing if O365 hasn't been rolled out to all users in that system yet. They may even have two different accounts.
- 2. Recipient logs in with an existing Microsoft account. This should be second option if O365 work/school account doesn't exist.
 - The sharer must use the email address associated with the Microsoft account
- 3. You can create non-licensed users in O365 admin center and provide them credentials (works for small number of users)
 - You then own the support aspects of that account as the system owner
- 4. You can require them to create Microsoft accounts to log in (better for larger number of users)
 - The account is run by Microsoft
 - You nor their IT department runs the account and cannot troubleshoot
- 5. Or, you can allow anonymous access and avoid the login process
 - They have equal permissions/abilities to other internal users

The Risks and Limitations

1. No time expiration on shares that are sent to authenticated users
2. Version of Office can be important if file is too complex for Office Online
<http://bit.ly/28OS95S>
3. Personal accounts will have access until you remove them.
4. There is no "mass remove" option for getting rid of users.

Lessons Learned

- Your users shouldn't just jump in to external sharing
 - Have your users test with an email account of their own. They need to know what their client will see.
- Perform a regular audit and determine whether all external users require continued access.
- If your recipient organization is *testing* Office 365, it could be *really* confusing.

Bonus: Check out the infographics at <http://icansharepoint.com/category/infographics/>, including this one on everyday usage limits of SharePoint 2013, 2016, and Online: <http://tinyurl.com/SPUseLimits>

