# MS SharePoint: Adding an external colleague to a site

This guide steps a **SharePoint site owner** through adding an external colleague (ie someone outwith the University of Aberdeen domain 'abdn') to their SharePoint site. This can be as a **visitor**, with read-only access to view materials, or as a **member**, allowing them to participate in collaboration.

**Note**: Before you can add an external colleague to your SharePoint site, the site must be enabled to allow external access. If your site is not already enabled, you can request this via the IT Service Desk.

⚠️ Please remember that SharePoint is a collaboration tool. Information or files you post on a SharePoint site may be available to all other site members and could be disclosed in response to a freedom of information request. You should consider the appropriateness of what you record on SharePoint. Only record what is relevant and necessary and do not share anything that impacts on the privacy of individuals. If you are unclear about how and where to appropriately record information, please contact the Information Governance Team at dpa@abdn.ac.uk.
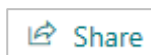
## Locate your SharePoint Site

1. Sign into **Outlook Web Access** (OWA) at outlook.com/abdn.ac.uk
2. Go to the **App launche**r (waffle icon, top left) and choose **SharePoint**
3. **Click** on the name of the Site you want.
   If you cannot see it you can click on **University Gateway**, under Featured Links, and Search.

💡 We recommend you have at least one other Owner for your SharePoint site.

## Invite an external colleague to a Modern SharePoint site

1. Click **Share** at top right of screen.

2. In the **Share site** pop-out that appears, **enter the email address** of your external colleague and click on the address to select it.

3. SharePoint will recognise that the address you are adding is *outside* your organisation, ie not part of the 'abdn' domain.

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4. From the drop-down menu under the email address, set permission level for your external colleague to either:

    − **Read** - as a site visitor (default) *or*

    − **Edit**  - as a site member

5. Leave box ticked to **Send email**

6. **Add** an explanatory message.

7. Click **Share**



## Invite an external colleague to a Classic SharePoint site

1. Click **Share** at top right of screen.   

2. In the **Share** *sitename* dialog that appears, **enter the email address** of your external colleague and click on the address to select it.

3. SharePoint will recognise that the address you are adding is *outside* your organisation ie not part of the 'abdn' domain.



4. Click **Show options** and make sure the **Send an email** invitation checkbox is ticked.



5. From the drop-down menu set the permission level for your external colleague. This will be either

    − Site name Members **[Contribute]** *(default) or*

    − Site name Visitors **[Read]**

6. **Add** a personal message.

7. Click **Share**

> ⚠️ An external colleague with **Read** permissions is regarded as a **Site visitor** and can only open and view files, communication and resources.
>
> An external colleague with **Edit** permissions is regarded as a **Site member** and as such can add, edit and **delete** files, collaborate and communicate.

# What should your external colleague expect?

1. SharePoint sends an email to the address you provided for your external colleague which includes a link to your SharePoint site. You will be copied into this email.

   If your colleague doesn't see it, they should check their Spam and Junk mail folders as the email may arrive there.

2. Your external colleague should click on the **Go to *Site name*** link.
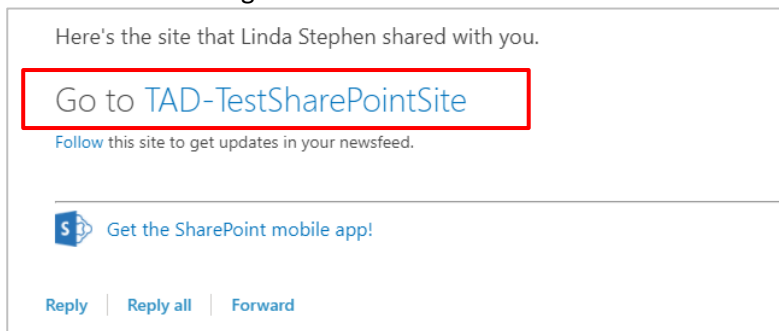
   

   **Note**: If they have any issue clicking on the link, they should try copying and pasting it into a different browser with a cleared cache.

3. What happens next will depend on whether your external colleague has a Microsoft account or not, whether they have already been added as an external guest in some way to the 'abdn' domain (for example, to a Teams site), and what device they are using when they click the link.

## An external colleague who is already a Guest of the University of Aberdeen

If your external guest has already been invited to another University of Aberdeen SharePoint Site or MS Teams or OneDrive file, they will have already agreed to Guest terms of use for University of Aberdeen, and have set up their method of security verification for their account.

1. If they see a Microsoft Sign In window, they should **sign in** with their personal or organisational Microsoft 365 account.
   (The personal Microsoft account could be the one that they were prompted to create the first time they accessed another University of Aberdeen Microsoft 365 app, eg Teams or OneDrive for Business.)

2. Verify their account, when prompted, using the method they chose on first becoming a guest, eg entering a code received on their mobile.

3. They should then see the SharePoint site.

## An external colleague who is not a Guest of the University of Aberdeen

Your external guest will be prompted to view a University of Aberdeen privacy statement.
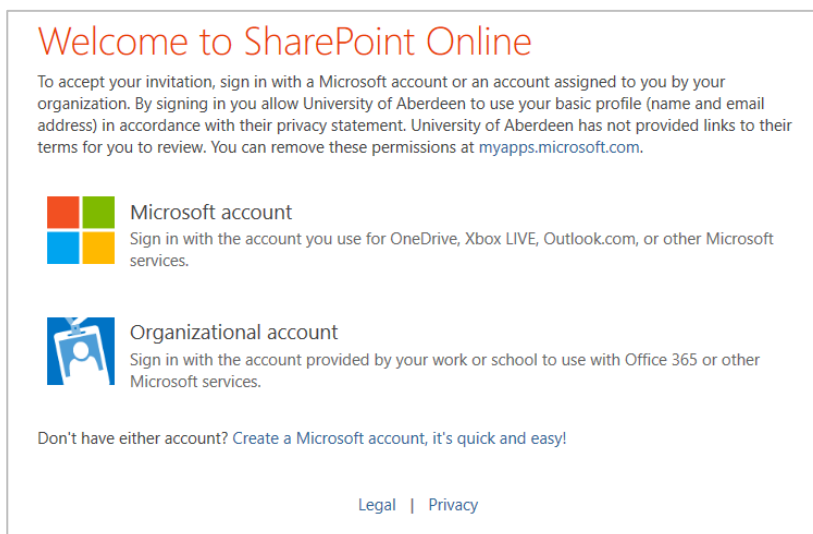
## External colleague with a Microsoft account

1. They can choose to click **Microsoft account** or **Organizational account** and **sign in**.

2. They will be asked for **more information** and stepped through **additional security verification** where they can choose how they wish to be contacted[1], eg enter a mobile number so they can receive a code that they can then use to **Verify** their account.

3. They will be prompted to view and accept **University of Aberdeen Guest terms of use**.
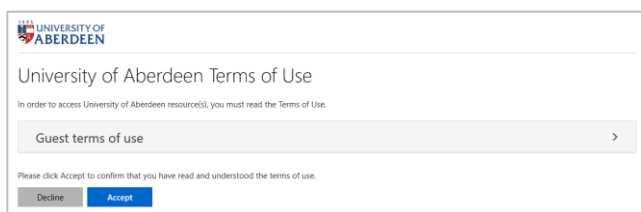


4. The SharePoint site will open in Microsoft 365 online and they can either view or edit depending on the permissions you set.



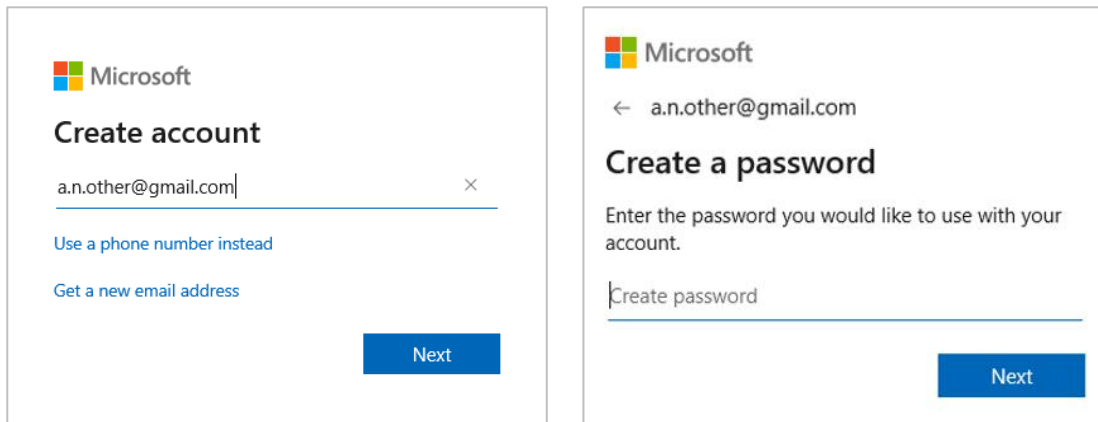## External colleague without a Microsoft account

1. As their account is not a Microsoft or Organisational Microsoft 365 account, they **must** choose to **create** one using the link at the foot of the University of Aberdeen privacy statement: *Don't have either account?* ***Create a Microsoft account****, its quick and easy*.
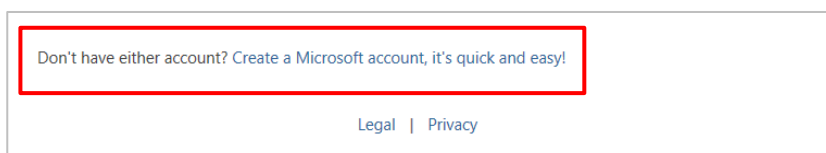


⚠️ They will only need to go through this process once, but should take careful note of details as they will be prompted to use this if invited view/edit another Site or Team or OneDrive file.

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[1] Each time they try to open the site they will be prompted for verification.

2.  In the **Create Account** window, they should **enter** the email address of the account they **received the invitation into** and click **Next**.

3.  They will then be prompted to create a password and click **Next**.
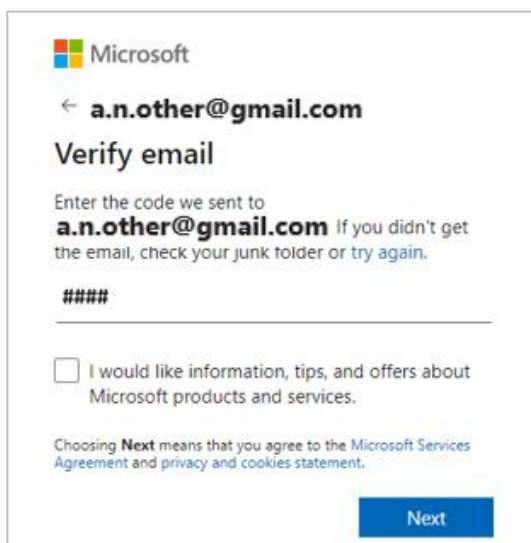


4.  They will be prompted to enter their **Birth date** and click **Next**.

5.  A code is sent to your guest's email account which they should enter to **Verify their email** address.

> It is advisable to **untick** the checkbox regarding receiving information and offers from Microsoft.

6.  Click **Next**.



7.  As an additional security check and to prove they are not a robot, your guest will be prompted to **enter** the characters they see, or to solve a puzzle, then to click **Next.**

8.  They will be prompted to **Review** and **Accept** permissions.

9.  Now that a Microsoft account has been set up for your external colleague, they will next be asked for more information and be stepped through **additional security verification** where they can choose how they wish to be contacted[2], eg enter a mobile number so they can receive a code and then enter that to **Verify** their account.

10. They will be prompted to view and accept **University of Aberdeen Guest terms of use**.

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[2] Each time they try to open the site online they will be prompted for verification.
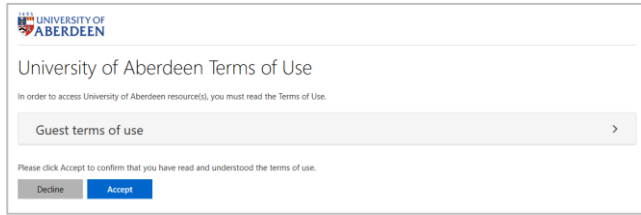
11. The SharePoint site will open in Microsoft 365 online and they can either view or edit depending on the permissions you set.
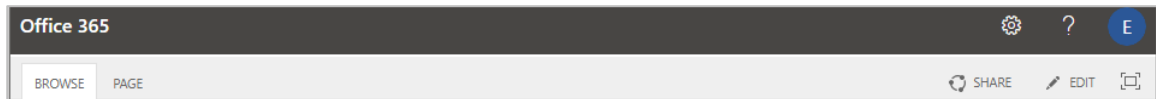


## To stop sharing with your external colleague

In a **Modern** SharePoint site go to **Share**, find your colleague and from the drop-down options choose *Remove*.

In a **Classic** SharePoint site go to the cog (top right) – **Site settings** – **Site permissions**. Find and select your colleague and choose *Remove users from group* from drop-down menu under Actions.

## Further information and help

See Guides and Links about SharePoint on Toolkit.

Microsoft Help on SharePoint

Contact the Service Desk: myit.abdn.ac.uk