Sharing Office 365 Files via Outlook

OneDrive and SharePoint files can be shared one of two ways – the share can be initiated from the file itself or it can be initiated through Outlook. This job aid reviews how to share files through Outlook 2016.

Who Can Files Be Shared With

Before sharing any files, it's important to understand *who* files can be shared with.

- **OneDrive** - Files can be shared with anyone inside or outside UMB.

- **SharePoint** – Certain SharePoint sites only allow for files to be shared with other UMB employees. Sharing with people external to UMB may be restricted. Contact your SharePoint Site Owner or Help Desk if you experience any issues sharing or have any questions.

From Outlook 2016

1. Open a new email.
2. Fill in the various fields (To:, Subject, message) as necessary.
3. To attach a file, click on the **Attach File** icon in the toolbar.
4. Once selected, the window will look similar to the following:
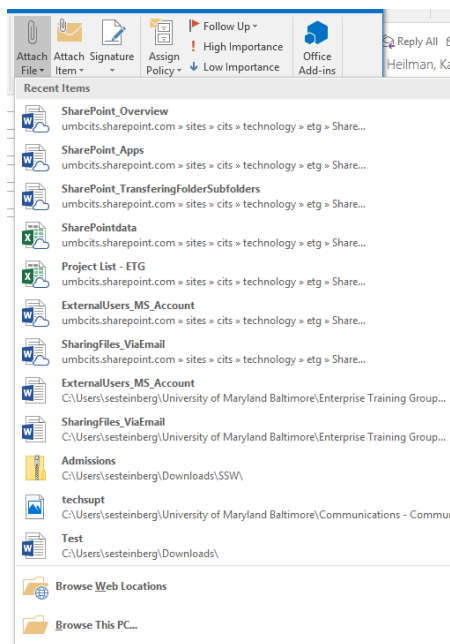
   a. A list of the most **Recent Items** accessed will appear. The cloud in the corner of the file icon notes that this file is located on OneDrive or SharePoint. If there is no cloud, the file either doesn't reside in OneDrive or SharePoint or hasn't synced yet.

b. At the bottom of the list, options to browse **Web Locations** (OneDrive & SharePoint) or **This PC** (via File Explorer) will be available if the file to be shared does not appear in the **Recent Items** list.

5. Locate and select the file to be shared.
6. If the file is located in OneDrive or SharePoint, the option to either **Share Link** or **Attach as copy** will appear.
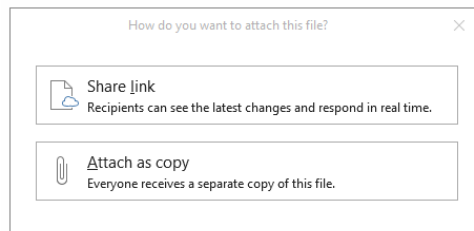
   a. **Share Link** will send a link to the recipient and the recipient will have access to the file as it resides in the <u>UMB employee's</u> OneDrive or SharePoint. This allows for real time collaboration and both people will be able to see changes real time. ** See below on how to share externally.
   b. **Attach as Copy** sends a copy of the file. This option does not allow for real time collaboration. Any changes made in the file will not appear in the sender's copy.
7. If **Share Link** is selected, the file will appear with a cloud in the corner of the icon and states "Recipients can edit". If **Attach as Copy** is selected, no cloud will appear on the icon.
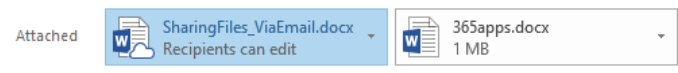
8. Fill out the email message as necessary and once the email and attachments are complete, click **Send**.

** External Recipients – Microsoft Account

When selecting **Share Link** for recipients who are external to UMB, they will be required to sign-in with a Microsoft account in order to access the file. If a Microsoft account does not exist, one must be created. **** NOTE ** The account MUST be created using the email address that the file was sent to.** If a different email address is used, access to the file will be denied. This is in order to verify the recipient's credentials and ensure the safety of UMB's online environment. For more details, view [Creating a Microsoft Account – External Users](#).

Sharing Directly From the File - To learn how to share a file directly from the file or to learn how to stop sharing, view [Sharing OneDrive Files and Folders](#).