



NHSmail Office 365 Hybrid service

**External Collaboration
using Azure B2B (Guest
Access) Service**

June 2020
Version 1

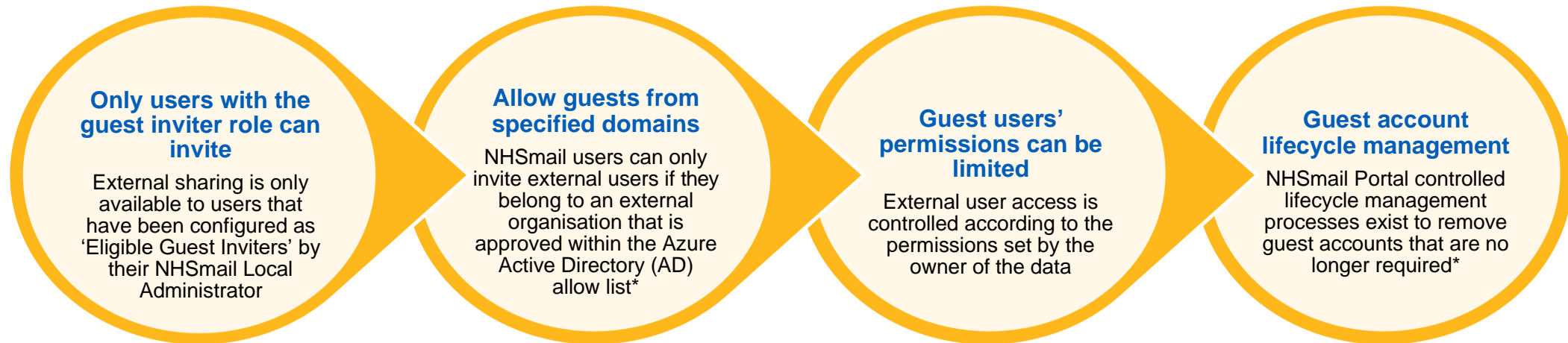
NHSmail is provided by NHS Digital in partnership with Accenture





Azure B2B (External Access)

Azure business-to-business (B2B) allows you to securely share Office 365 (O365) data and collaborate across O365 applications with guest users from external organisations. This is achieved via a simple invitation and redemption process, allowing guests to use their own username and password to access NHSmail O365 Hybrid services. This guidance document provides detail around how the Azure B2B process works and how to set up guest user accounts.



The account requester will be responsible for co-ordinating with the individual application owners to arrange for specific authorisation and application permissions. This can be arranged with the help of your Local Administrator.

* For more detail or to request a domain for allow listing, please contact your Local Administrator.



Creating Guest Accounts – Manually Adding (1 of 3)

The eligible guest inviter must complete the following steps in order to provide guests with O365 access:

1. Log in to the NHSmail Portal and navigate to the **Guest Access** tab. Select **Add**, then **Add Guest Users**.
 2. Complete the required email field for each guest user that requires access and select **Submit**. Select **+** to add up to 5 guests.
- Note:** If more guest users are required please see the bulk upload process on slide 5.

Display Name	Email Address	Creation Date	Status
	test2.b@accenture.com	08-10-2019	Pending_Invite
	test2.a@accenture.com	08-10-2019	Pending_Invite
	test1@accenture.com	08-10-2019	Pending_Invite
	rekha.e.singh@accenture.com	08-10-2019	Pending_Invite
Mohapatra, Smruti A.	smruti.a.mohapatra@accenture.com	08-10-2019	Active

Instructions

Please add the email address(s) of an external person requiring access to NHSmail hybrid services.

To add more manually use the plus sign (+) button on right.

To add more than 5 guests please use the "Bulk Upload" button on view page.

To remove manually use the minus sign (-) button on right.

An Email summary will be sent with the status of all users added here.

Guest Users Details

Email Address 1* + -

Cancel Submit



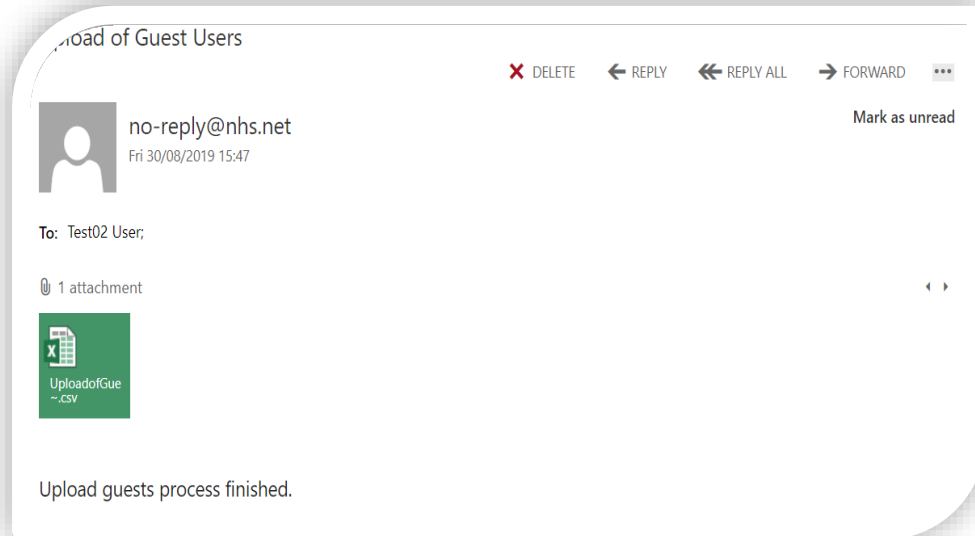
Eligible guest inviter permissions are provided by Local Administrators (LAs). Please speak to your LA, who will need to set you up with this permission before you can invite guests.



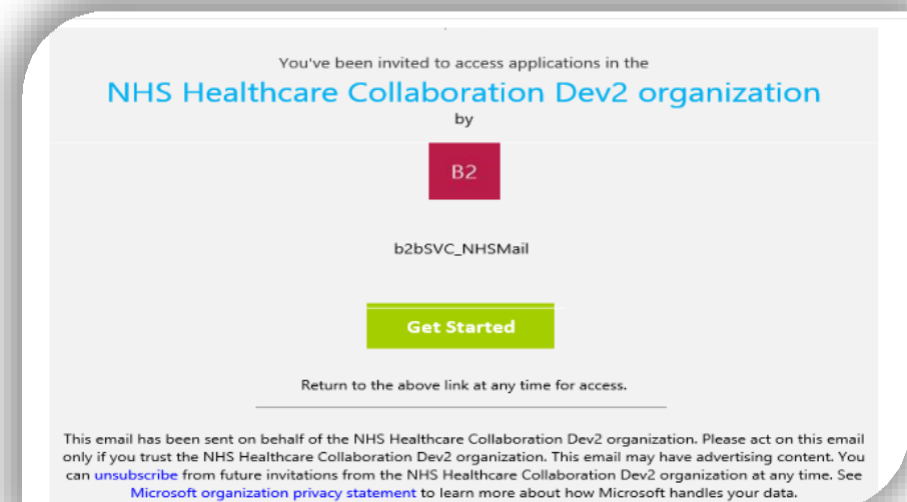
Creating Guest Accounts – Manually Adding (2 of 3)

3. Submitting this request will generate the following two automated emails:

a) To the requester providing a status update on the request



b) To the external guest with confirmation and account verification steps





Creating Guest Accounts – Manually Adding (3 of 3)

4. After submitting, the Portal will re-direct you to the View Guest Users screen and a success / fail notification will appear. You must refresh the page in order to see your additional guests.

The screenshot shows the NHS Scotland portal with a success notification: "success: Successfully sent invite to guest user ashwini.harihararao@accenture.com". The user is logged in as "Admin Test02". The "View Guest Users" screen displays a table with the following data:

Display Name	Email Address	Creation Date	Status
	test2.b@accenture.com	08-10-2019	Pending_Invite
	test2.a@accenture.com	08-10-2019	Pending_Invite
	test1@accenture.com	08-10-2019	Pending_Invite
	rekha.e.singh@accenture.com	08-10-2019	Pending_Invite
Mohapatra, Smruti A.	smruti.a.mohapatra@accenture.com	08-10-2019	Active

At the bottom, there are pagination controls for 10, 25, and 50 items.

5. After refreshing the page, the new users will be added to your 'View Guest Users' list as shown below.

The screenshot shows the NHS Scotland portal after a refresh. The user is logged in as "Admin Test02 User". The "View Guest Users" screen displays a table with the following data:

Display Name	Email Address	Creation Date	Status
	ashwini.harihararao@accenture.com	09-10-2019	Pending_Invite
	test2.b@accenture.com	08-10-2019	Pending_Invite
	test2.a@accenture.com	08-10-2019	Pending_Invite
	test1@accenture.com	08-10-2019	Pending_Invite
	rekha.e.singh@accenture.com	08-10-2019	Pending_Invite
Mohapatra, Smruti A.	smruti.a.mohapatra@accenture.com	08-10-2019	Active

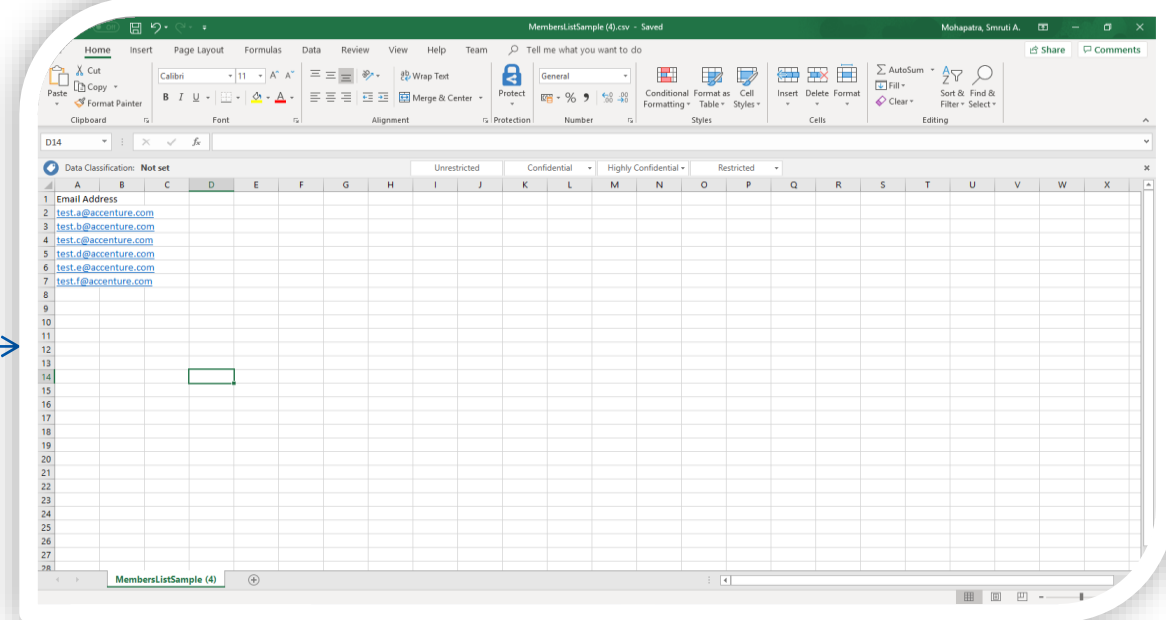
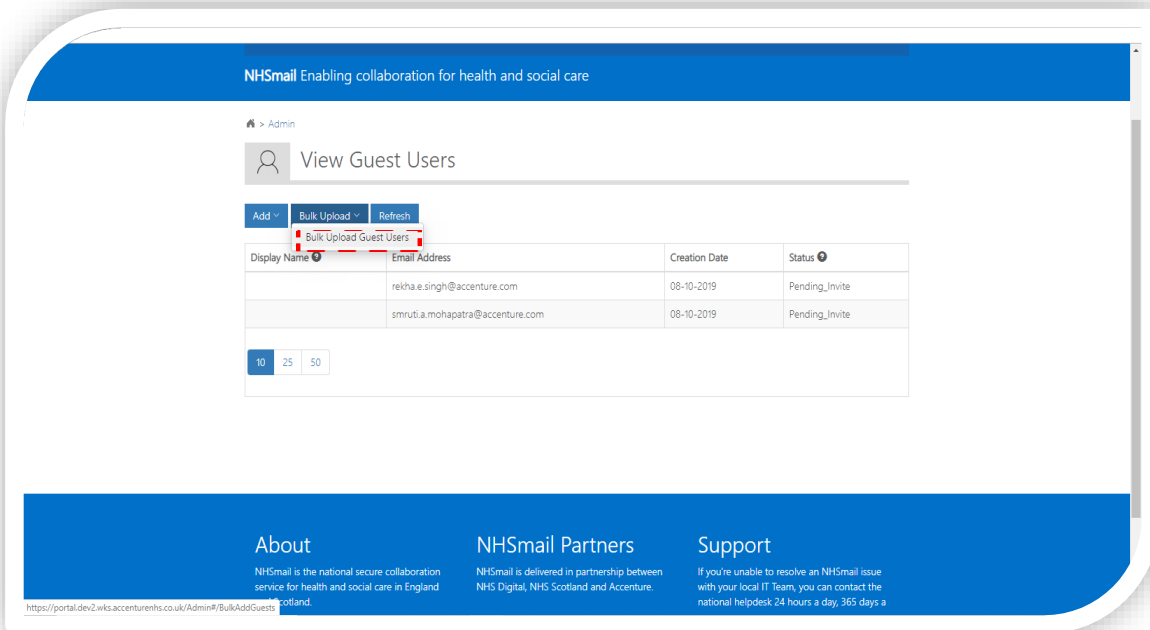
At the bottom, there are pagination controls for 10, 25, and 50 items.



Creating Guest Accounts – Bulk Uploads (1 of 3)

The eligible guest inviter must complete the following steps in order to provide multiple (6+) guests with O365 access:

1. Log in to the NHSmail Portal and navigate to the 'Guest Access' tab. Select **Bulk Upload Guest Users**.
2. Enter the guest user details into an Excel spreadsheet in order to prepare for a bulk upload.



Eligible guest inviter permissions are provided by Local Administrators (LAs). Please speak to your LA, who will need to set you up with this permission before you can invite guests.



Creating Guest Accounts – Bulk Uploads (2 of 3)

3. Select **Browse** / **Upload** to locate and attach the CSV file containing the guest user information.

4. Once uploaded, your file will be visible on the Portal and ready for submitting. As with the manual upload process, both the inviter and guests will receive automated emails as shown on slide 4.

The screenshot shows the 'Upload Guest Users' page in the NHSmail Admin portal. The page has a blue header with the NHSmail logo and the text 'Enabling collaboration for health and social care'. Below the header, there's a breadcrumb 'Admin' and a title 'Upload Guest Users'. A large 'Instructions' box contains text about uploading CSV files, including a maximum limit of 500 invites per file and a 10-minute processing time. At the bottom of the instructions, it says 'Use format below when uploading CSV files: Sample File (NHSmail 1 format)'. Below the instructions, there's a 'Select a file to upload:' label followed by a file input field. The 'Browse' and 'Upload' buttons are highlighted with a red dashed box. A 'Cancel' button is located below the input field. The footer contains links for 'About', 'NHSmail Partners', and 'Support'.



This screenshot shows the same 'Upload Guest Users' page, but now the file input field contains the text 'MembersListSample (4)'. The 'Browse' and 'Upload' buttons remain highlighted with a red dashed box. The 'Cancel' button is still present below the input field. The rest of the page, including the header, instructions, and footer, is identical to the previous screenshot.



Creating Guest Accounts - Bulk Uploads (3 of 3)

5. After submitting, the Portal will re-direct you to the View Guest Users screen and a success / fail notification will appear. You must refresh the page in order to see your additional guests.

6. After refreshing the page, the new users will be added to your 'View Guest Users' list as shown below.

NHS SCOTLAND

Admin Test02

success: Bulk Import for Guests Access completed. An Email will be sent with upload status of all users added here.

Home People Finder Admin Angular Profile Reports Guest Access Email Help

NHSmail Enabling collaboration for health and social care

Admin

View Guest Users

Add Bulk Upload Refresh

Display Name	Email Address	Creation Date	Status
	ashwini.hariharao@accenture.com	09-10-2019	Pending_Invite
	test2.b@accenture.com	08-10-2019	Pending_Invite
	test2.a@accenture.com	08-10-2019	Pending_Invite
	test1@accenture.com	08-10-2019	Pending_Invite
	rekh.e.singh@accenture.com	08-10-2019	Pending_Invite
Mohapatra, Smruti A.	smruti.a.mohapatra@accenture.com	08-10-2019	Active

10 25 50

NHS SCOTLAND

Admin Test02 User Logout

Home People Finder Admin Angular Profile Reports Guest Access Email Help

NHSmail Enabling collaboration for health and social care

Admin

View Guest Users

Add Bulk Upload Refresh

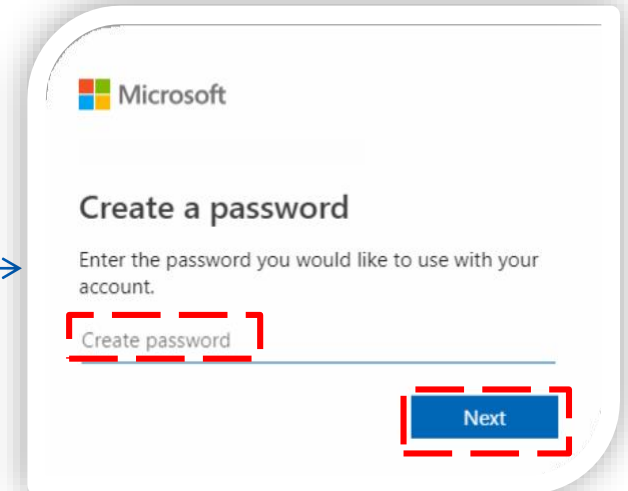
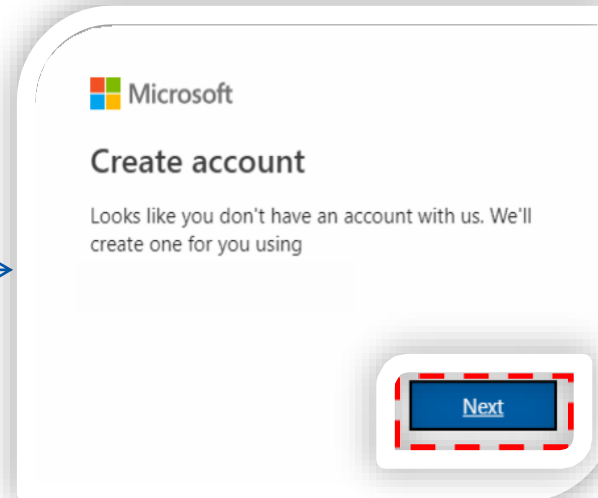
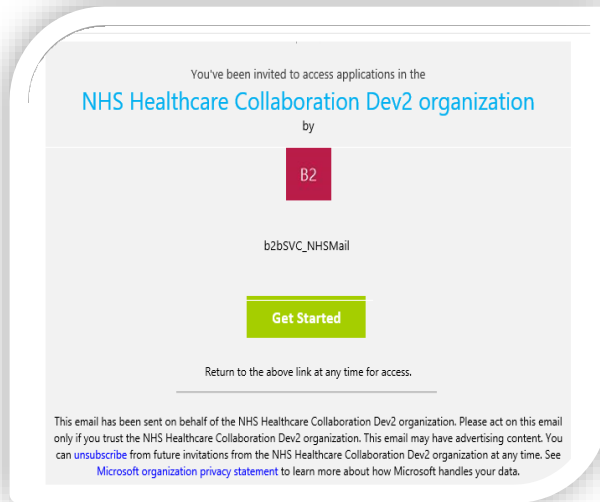
Display Name	Email Address	Creation Date	Status
	test.f@accenture.com	09-10-2019	Pending_Invite
	test.e@accenture.com	08-10-2019	Pending_Invite
	test.d@accenture.com	09-10-2019	Pending_Invite
	test.c@accenture.com	09-10-2019	Pending_Invite
	test.b@accenture.com	09-10-2019	Pending_Invite
	test.a@accenture.com	09-10-2019	Pending_Invite
	ashwini.hariharao@accenture.com	09-10-2019	Pending_Invite
	test2.b@accenture.com	08-10-2019	Pending_Invite
	test2.a@accenture.com	08-10-2019	Pending_Invite



Guest User Account Creation (1 of 3)

The external user will need to complete their account set up. This will create a Microsoft account so that they can collaborate in O365:

1. The external user will receive an email (to the email address provided by the eligible guest inviter) similar to the screenshot below. This confirms they have been invited as a guest user. They will need to select **Get Started** to create their account.
2. The external user will be directed to the 'Create account' page. They must select **Next**.
3. The external user will then need to create a password for the account. The password will need to be at least 8-characters. They will then need to select **Next**.



Guests who have an existing O365 account in Azure AD will be prompted to follow an account authentication process as opposed to the listed account creation steps – see slide 12



Guest User Account Creation (2 of 3)

4. The external user will be asked for the Country / region they are in and their date of birth. Once entered, select **Next**.
5. The external user will then need to verify their email address. A security code will be sent to their email address which they will need to enter in the box below. Select **Next**.
6. As part of additional account verification, they will be asked to enter the characters they see in the box below and then select **Next**.

Microsoft

←

Create account

We need just a little more info to set up your account.

Country/region

Birthdate

Month ▼ Day ▼ Year ▼

Next

Microsoft

←

Verify email

Enter the code we sent to

If you didn't get the email, check your junk folder or [try again](#).

Enter code

☒ I would like information, tips, and offers about Microsoft products and services.

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

Next

Microsoft

←

Create account

Before proceeding, we need to make sure a real person is creating this account.

G1S V3V

New

Audio

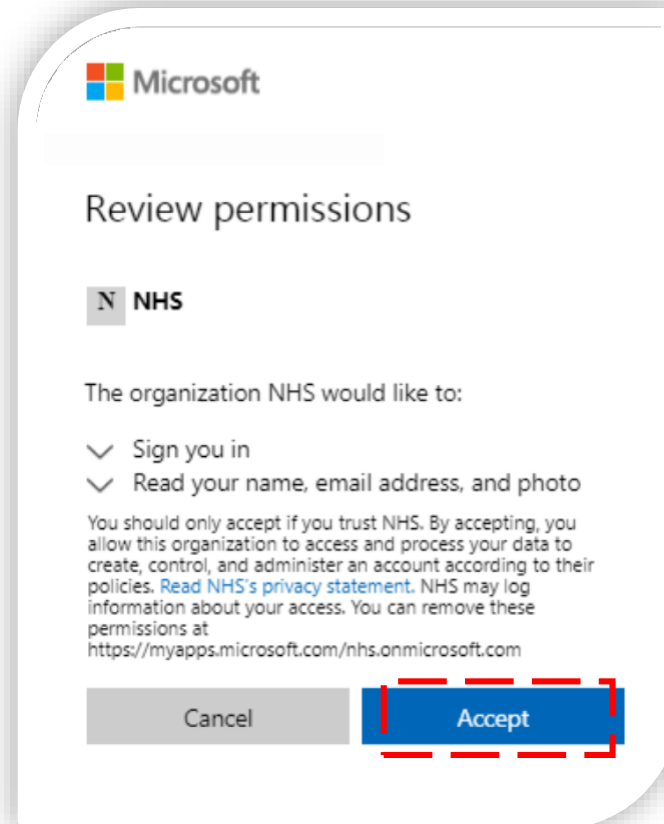
Enter the characters you see

Next



Guest User Account Creation (3 of 3)

7. Finally, the external user will need to review and **Accept** the below permissions. Once the account has been created, NHSmail O365 users will be able to search for and collaborate with the newly created guest user account.

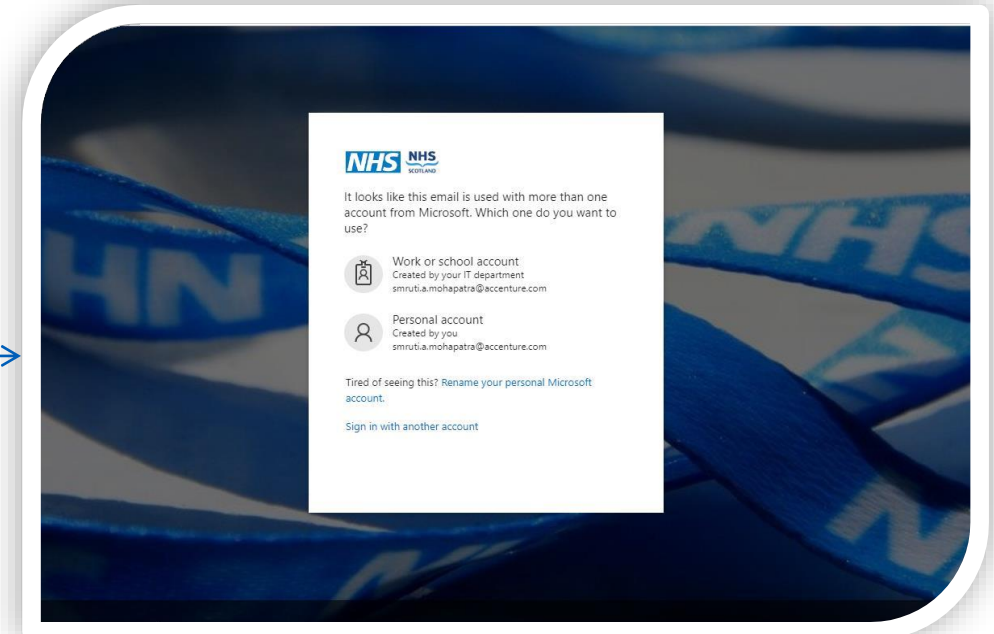
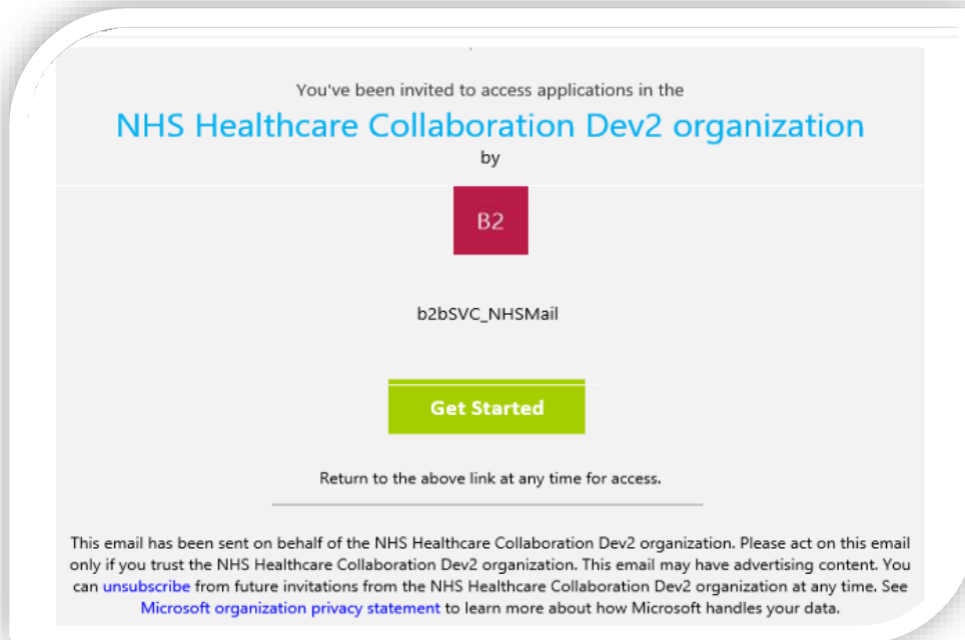




Guest User Account Authentication (1 of 2)

If a user has an existing O365 account in Azure AD then they will need to complete the following authentication process enabling them to collaborate in O365:

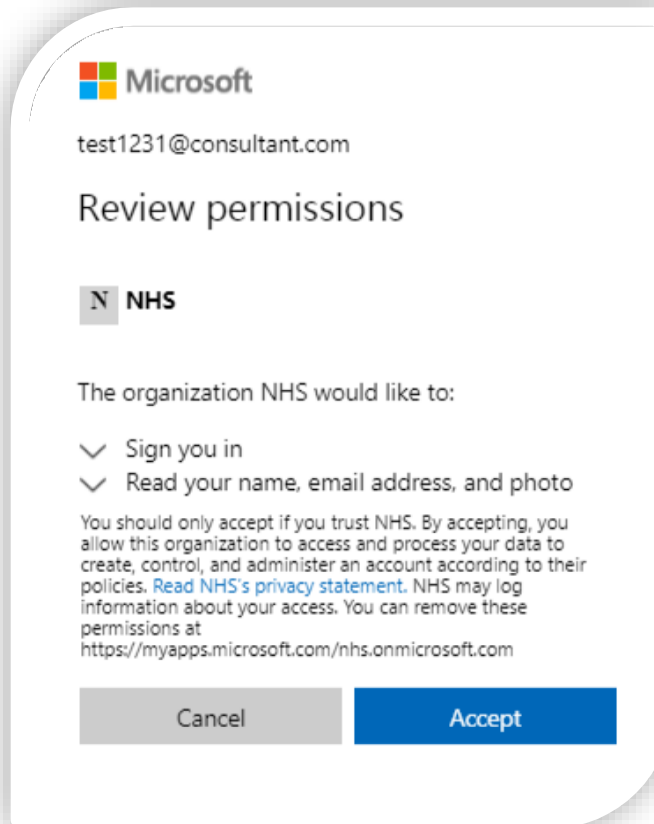
1. The external user will receive an email (to the email address provided by the eligible guest inviter) similar to the screenshot below. This confirms they have been invited as a guest user. They will need to select **Get Started** to verify / create their account.
2. If a user already has an account, the user will need to select the profile to sign in. Select – enter credentials to log into account





Guest User Account Authentication (2 of 2)

3. Finally, the external user will need to review and **Accept** the below permissions. Once the account has been authenticated, NHSmail O365 users will be able to search for and collaborate with the newly created guest user account.





External Sharing Settings

Once an external user is added into the Azure Active Directory, users can share using O365 applications as outlined below. Please note some O365 applications do not support external sharing with guest accounts.

O365 Application	B2B Guest Access Available*	Comments
<u>Microsoft SharePoint</u> Microsoft Power BI Microsoft Project Online	Yes	Contact your Local Administrator to enable sharing with external users from these applications, permissions can then be set by data owners. For Project Online external users must have a licence to access any functionality. Power BI Pro and Premium users can share their dashboard / reports with an external user.
<u>Microsoft OneDrive for Business</u> Microsoft Planner Microsoft Visio	Yes	OneDrive for Business and Planner external sharing is enabled. Visio diagrams in OneDrive can be shared as per the OneDrive external sharing policy.
<u>Microsoft Teams</u>	Yes	External users in Azure Active Directory can be added as guest users into Teams.
Microsoft Sway Microsoft Forms	Yes	Data from these applications can be shared with external users without requiring a guest account in Azure Active Directory.
Microsoft PowerApps Microsoft Flow Microsoft Stream Microsoft Staff Hub Microsoft Yammer	No	Data from these applications cannot be shared with external users, as per Microsoft settings.



*Azure B2B Guest Access is available once the aforementioned account creation / verification process (slide 9 to 13) is completed. Once the guest user account is created, access is dependent on users sharing data directly in O365. Instructions on how to do this in SharePoint, OneDrive and Teams can be found on slides 8 to 12.

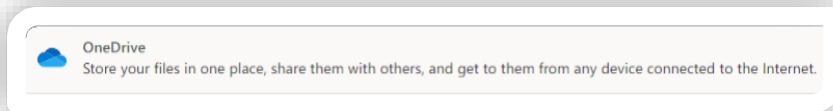


Share a document via OneDrive (1 of 2)

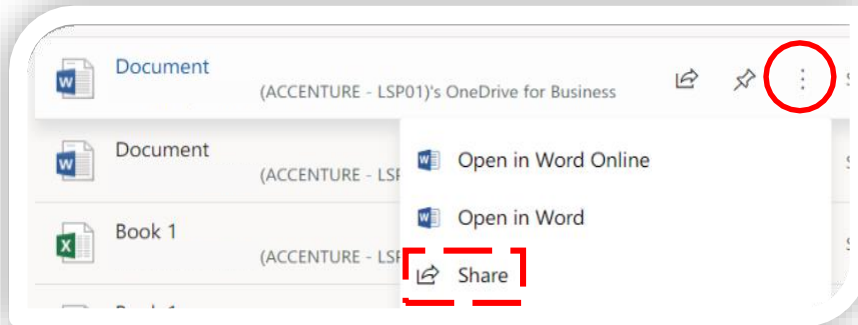


1. Navigate to portal.office.com and log in using your **nhs.net** username and password.

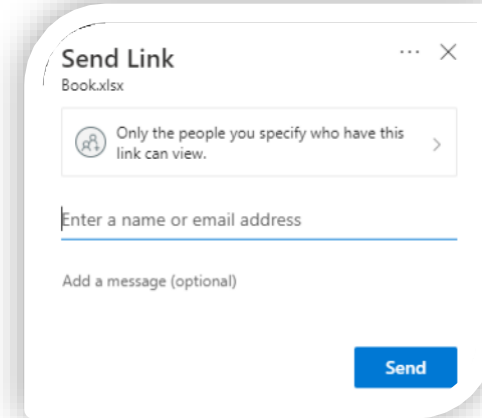
2. Select the OneDrive tile.



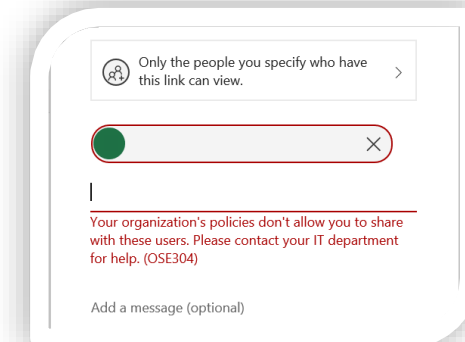
3. Here there will be a list of your documents. Select the document or folder you would like to share and select the three dots ('Show actions') and select **Share**.



4. Enter the external user's email address and select **Send**.



If you receive the message below, the domain of the external user you are trying to contact is not allow listed or you have not successfully completed the 'add guest' steps in slides 3-

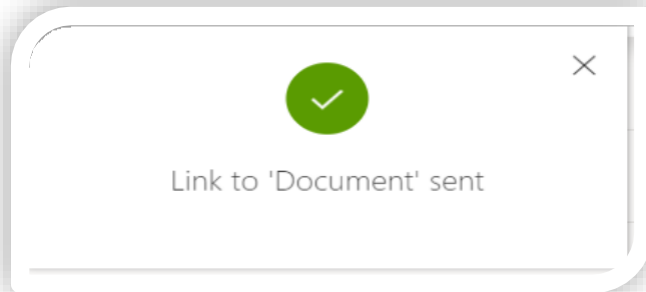




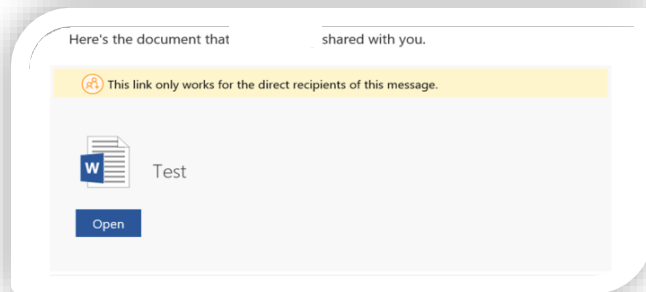
Share a document via OneDrive (2 of 2)



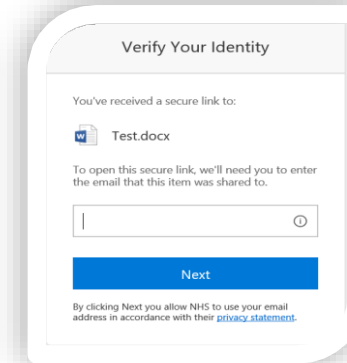
5. Check for the message below to ensure your data has been sent.



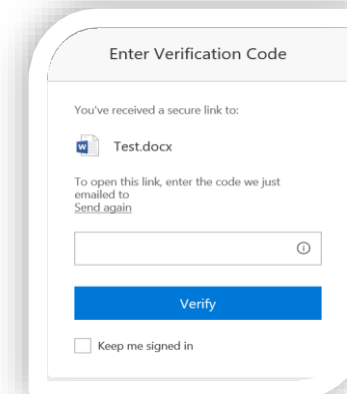
6. The external user will receive an email from **'no-reply@sharepointonline.com'** with a link to the document / folder.



7. The external user will need to redeem the guest invitation and enter the email address that the link was sent to.



A verification code will be sent to the same email address. The guest user will be required to enter this code then select **Verify**.



On occasions, Microsoft will require additional security steps to verify an account. In this scenario, guest users will be required to complete steps 7 to 9.

8. Once the external user has entered the code they will be able to access the shared data.

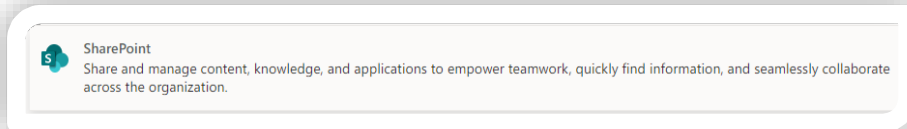


Share a document via SharePoint (1 of 2)

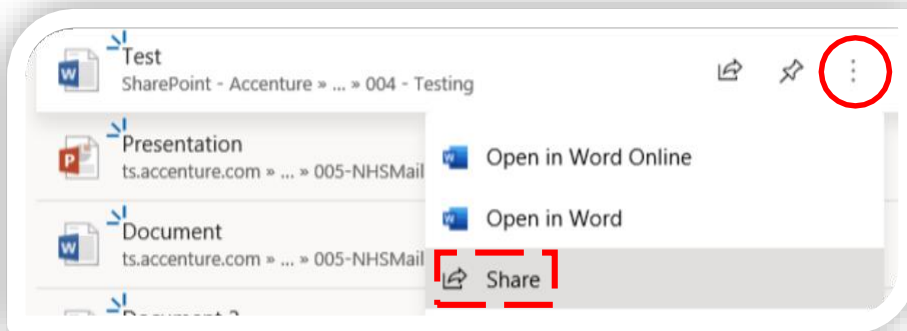


1. Navigate to portal.office.com and log in using your **nhs.net** username and password.

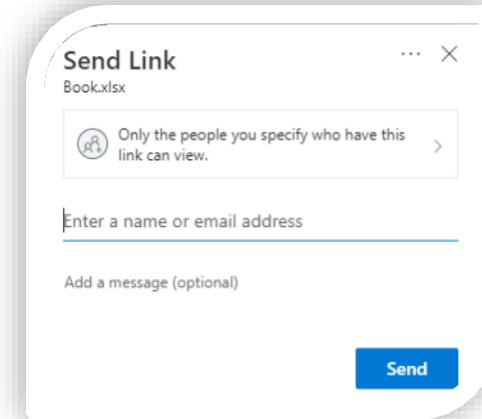
2. Select the SharePoint tile.



3. You will see a list of your documents. Select the document or folder you would like to share and select the three dots ('Show actions') and select **Share**.

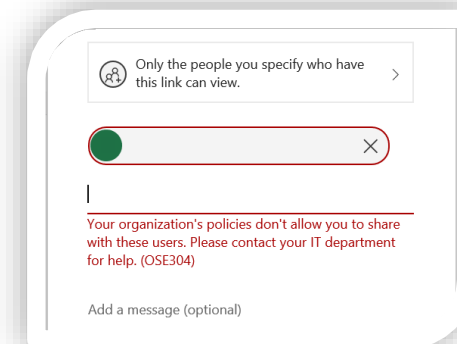


4. Enter the external user's email address and select **Send**.



If you receive the message below, the domain of the external user you are trying to contact is not allow listed or you have not successfully completed the 'add guest' steps in slides 3-

8

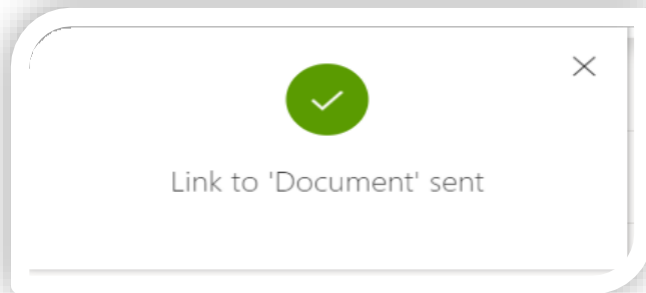




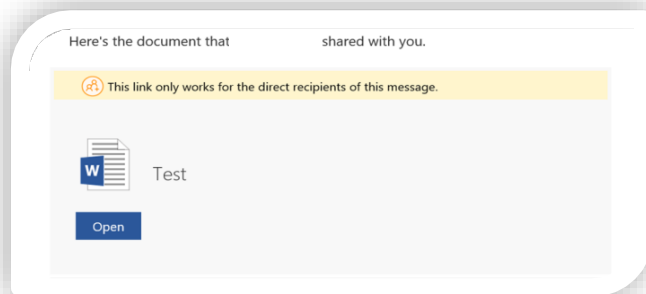
Share a document via SharePoint (2 of 2)



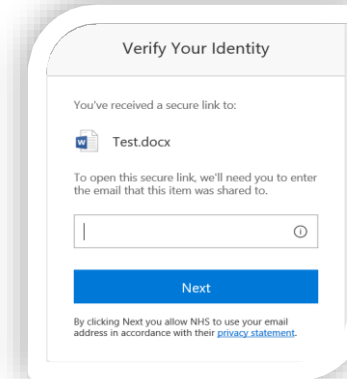
5. Check for the message below to ensure your data has been sent.



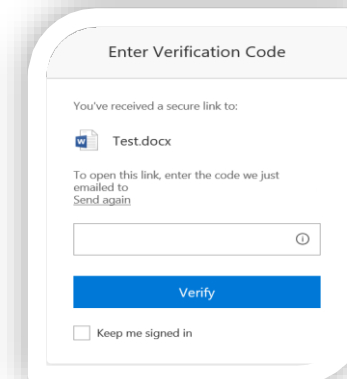
6. The external user will receive an email from 'no-reply@sharepointonline.com' with a link to the document / folder.



7. The external user will need to redeem the guest invitation and then enter the email address that the link was sent to.



8. A verification code will be sent to the same email address. The guest user will be required to enter this code and select **Verify**.



On occasions, Microsoft will require additional security steps to verify an account. In this scenario, guest users will be required to complete steps 7 to 9.

9. Once the external user has entered the code they will be able to access the shared data.



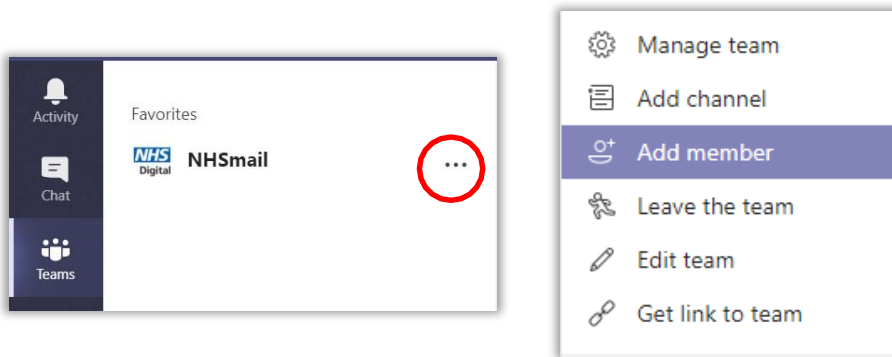
Add a Guest User to a Teams Site (1 of 2)



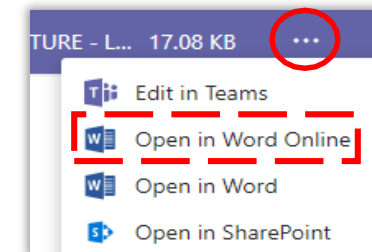
1. Open Teams and navigate to the team site that you would like to add an external user to.

Note: You must be an owner of the team to add a new member.

2. In Teams select the 3 dots ('More options') and select **Add member**. Add the external user as a member.



3. Select **Files** and open a document within Office Online (Word, PowerPoint, Excel).



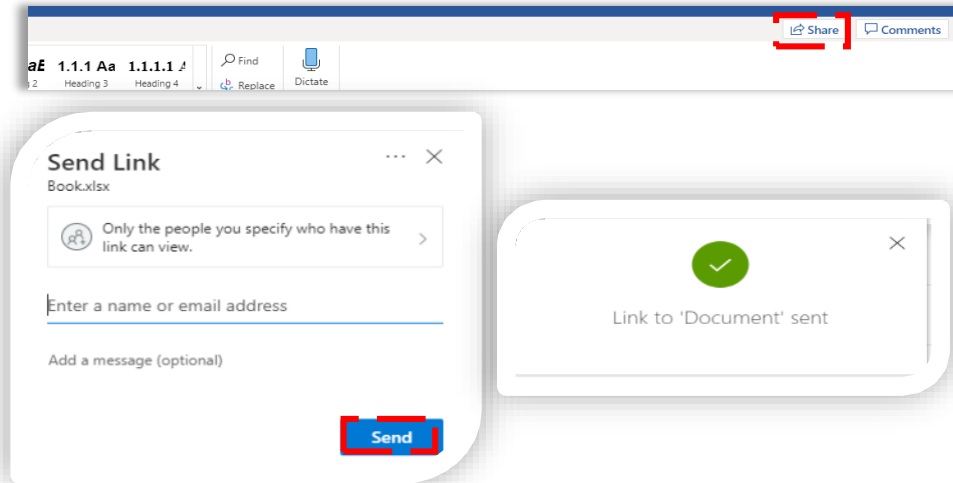
In order for steps 1 and 2 to be completed, the guest user account must already be set up in Azure Active Directory - as per the process outlined in slides 9-13. If the external guest account ID is not recognised within Teams, please follow steps 3 to 6.



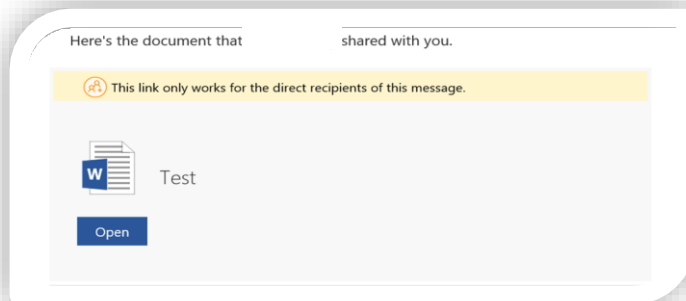
Add a Guest User to a Teams Site (2 of 2)

4. Select **Share**, enter the external user's email address and select **Send**.

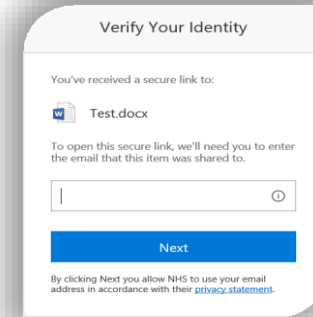
6.



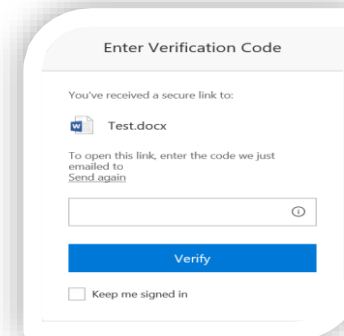
5. The external user will receive an email from 'Microsoft no-reply' with a link to the document.



The external user will need to redeem the guest invitation and then enter their username and password to access the document / Folder.



7. A verification code will be sent to the same email address. The guest user will be required to enter this code and select **Verify**.



8. Once completed, the guest can be added to the Teams site (following steps 1-2) and access the shared files.