

eShare M365 Trusted Sharing Action Menu App Installation Guide

Overview

The M365 Trusted Sharing Action Menu allows users to create Trusted Shares from the action menus that M365 presents to users when a file or folder is selected from within Teams, SharePoint Online and OneDrive. Users enjoy all the benefits of external file sharing using eShare while never leaving M365. This greatly improves user productivity and dramatically reduces the need for change management and training.

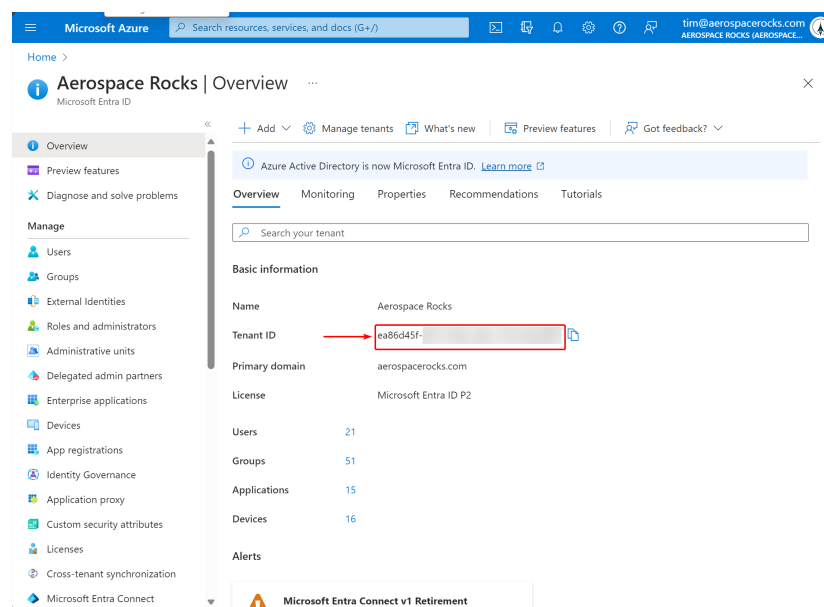
Please note that once the app is installed, all users will have access to eShare across all Teams channels, SharePoint sites and OneDrive. However, sharing policies can be configured to control what can be shared, by whom, and with whom. Your Customer Success Manager will work with you to ensure your data protection and governance policies are satisfied when the Action Menu is in use.

Prerequisite

You must have the role of Application Administrator or Global Administrator in your M365 Tenant to install this Enterprise Application.

Install Enterprise Application

Navigate to the Azure Portal (<https://portal.azure.com> or <https://portal.azure.us>) and sign into the platform with your M365 administrator account. Once logged into Azure, open the “Microsoft Entra ID” service and make note of your organizations “Tenant ID”.



In a new Tab or Window, enter the following URL while replacing the “*{tenant_id}*” section with your Organization’s Tenant ID.

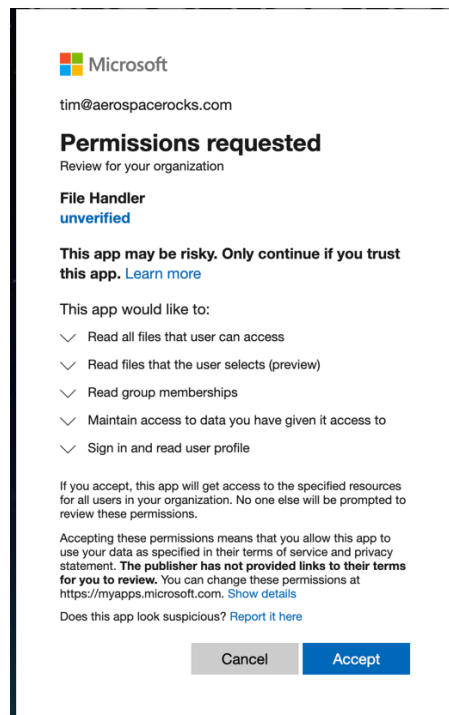
Azure Commercial Customer URL

https://login.microsoftonline.com/{tenant_id}/adminconsent?client_id=4805d431-5475-4254-9e43-0ed2f883b3be&redirect_uri=https://file-handler.eshare.com/api/auth/login

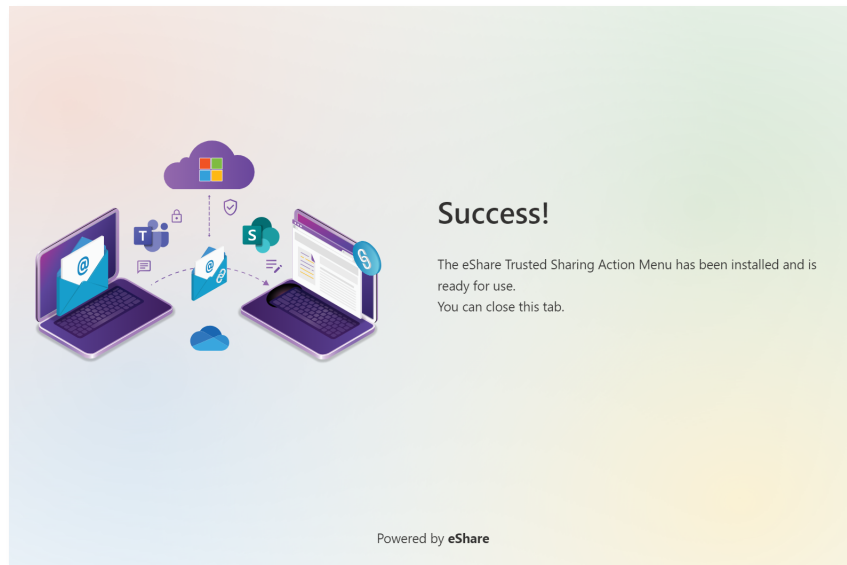
Azure Government Customer URL

https://login.microsoftonline.us/{tenant_id}/adminconsent?client_id=be7472f7-3199-468b-b230-2f03d23f2c33&redirect_uri=https://file-handler.e-sharegov.us/api/auth/login

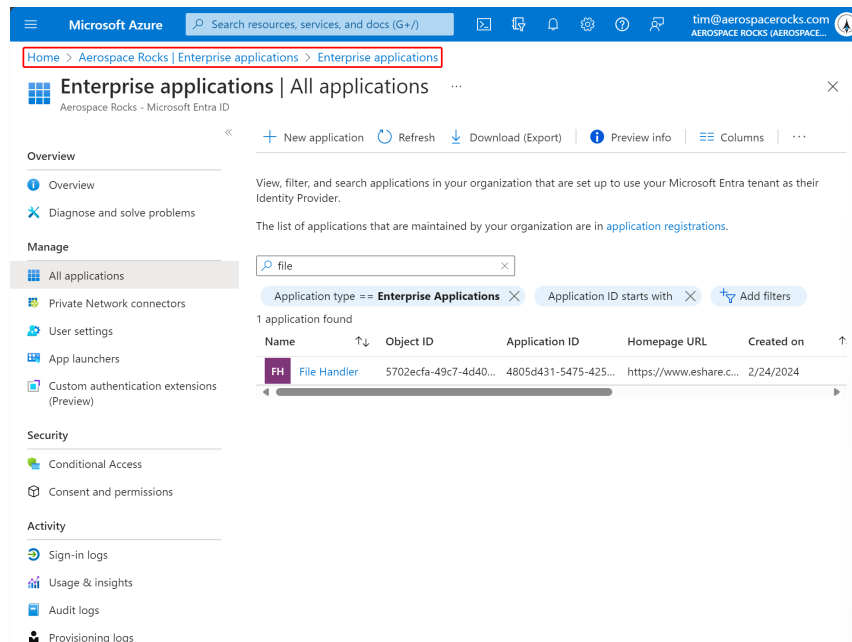
Once you enter this URL, you will be prompted to provide consent to the “**File Handler**” (aka Trusted Sharing Action Menu) application. Review the requested permissions and click “**Accept**” to add the application.

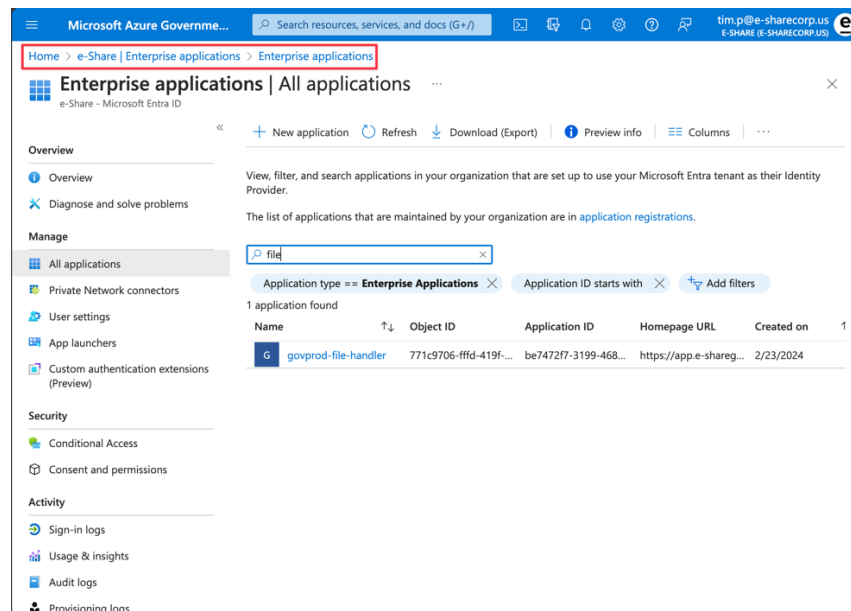


Once the permissions have been accepted, you will be brought to the following screen. This indicates you have successfully installed the **Trusted Sharing Action Menu** application.



To ensure the application was successfully installed, go back to “**Microsoft Entra ID**” and navigate to “**Enterprise Applications**”. Once this menu is opened, search for “**File Handler**” and verify the application exists.



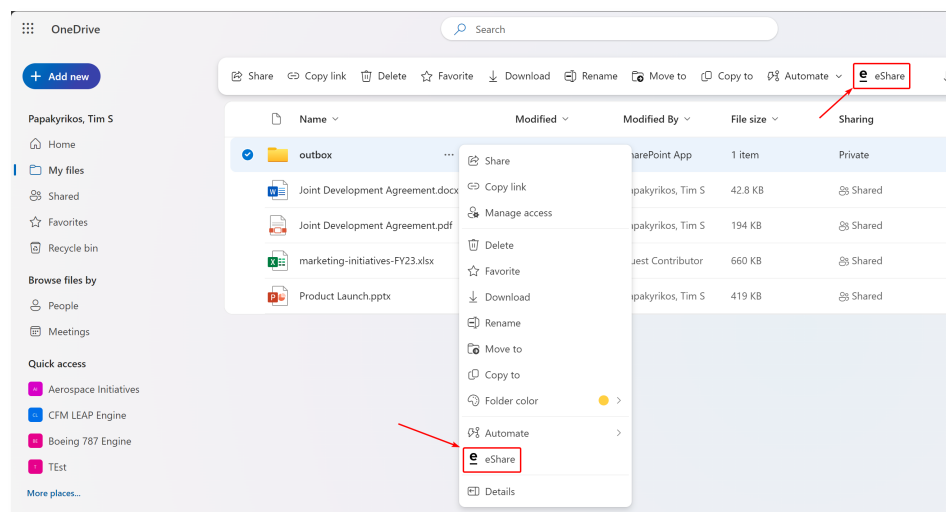


Please note it may take up to 48 hours for the application and its “eShare” menu button to appear across your Microsoft tenant

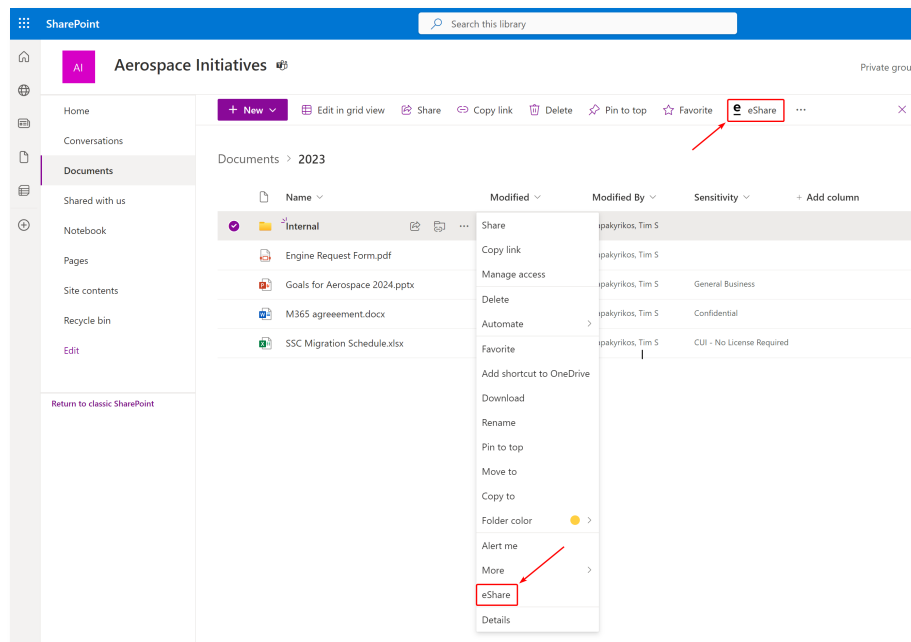
Using the Action Menu Application

After adding the Enterprise Application, you will begin to see the “eShare” button across the OneDrive, SharePoint, and Teams platforms (Note: if you/a user do not see the button, clear your browser cache and reload the page). The “eShare” button will be accessible in the following locations of the Microsoft Platform:

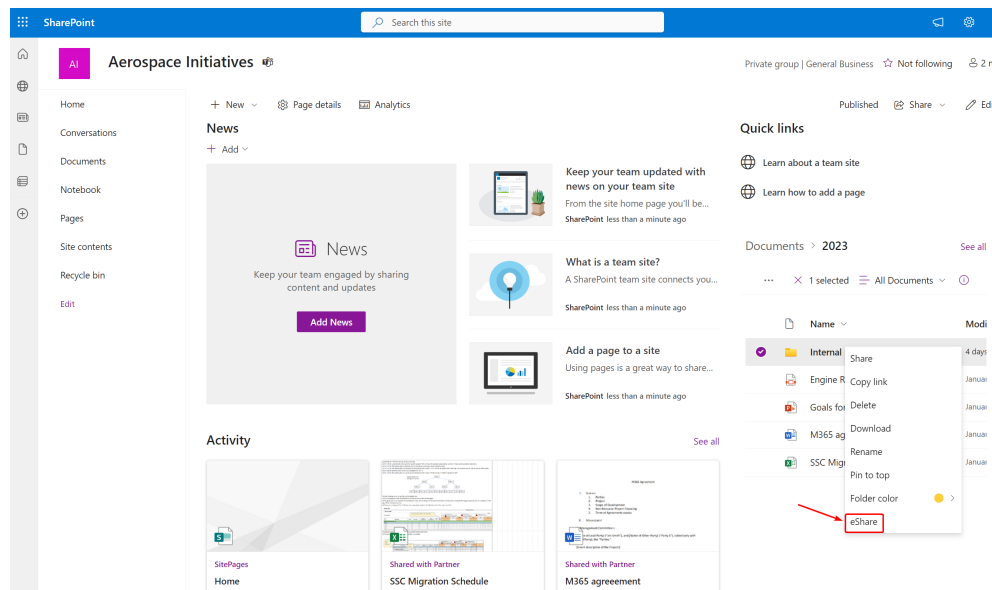
OneDrive Online “My Files” Tab



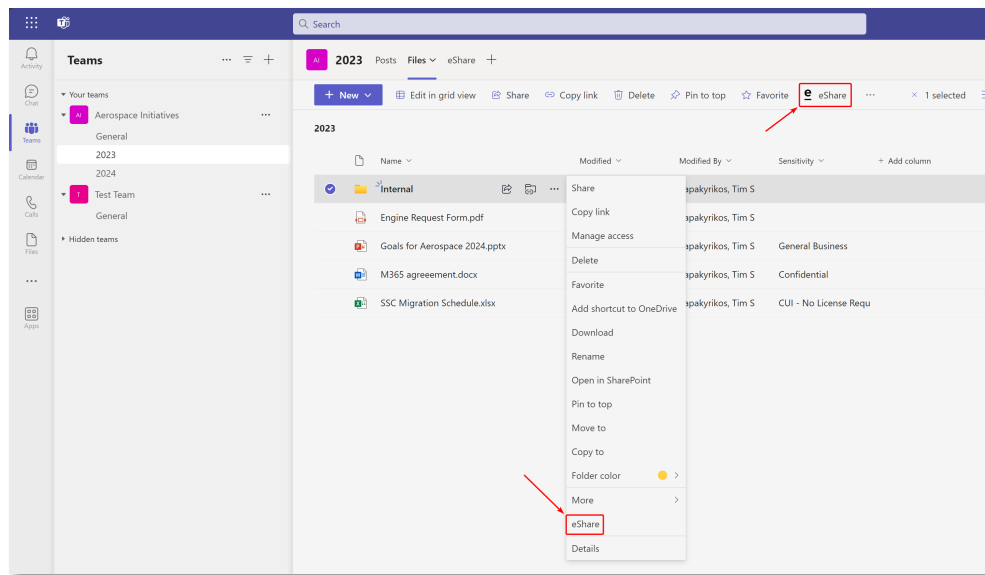
SharePoint Online “Document Libraries”



SharePoint Online “Home Page”



Teams Channel “Files” Tab



When the “**eShare**” button is selected, a new Tab will open within your browser where you can enter the necessary information to create your Trusted Share. This form is identical to what you would see were you to create a Trusted Share through all other means (e.g., eShare Cloud Web Portal).

Trusted Sharing Creation Page

Create Trusted Share

Trusted Share Name
Internal

Recipients
jen@linkwellco.com X Write or paste comma separated ema...

Message
Format Text

Hello -
Please review and let me know if you have any questions.
Thanks.

Sharing Policy
General Business Sharing Policy

Cancel Share

Powered by eShare

Once the Trusted Share is created you will receive a “*Trusted Share Created!*” message and are presented with 3 buttons:

Open Share = Directs you to your Organization’s eShare Cloud Web Portal to access the newly created Trusted Share.

Get shareable link = Copies a link to the newly created Trusted Share which you can past into emails and text messages for sending to your recipients.

Close Tab = Closes the tab and brings you back to your previous M365 page.

Trusted Sharing Completion Page

