Yale

How-To Securely File Transfer via OneDrive and Email

Quick Guide

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About Secure Files Transfer via OneDrive

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Use OneDrive to transfer files temporarily to others internally and externally securely.

- OneDrive is safeguard protected by Yale ITS and is approved for High-Risk data.
- Files can be shared internally or externally.
- Files are automatically deleted based on a date that you set.
- There is no limit to the number of files you can share.
- Individual files can be up to 250 GB in size and can be any file type.
- You will be notified via email when you shared content has been accessed.
- File transfers can be done. Some characters are invalid for file and folder names.

Logging into OneDrive

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Logging into OneDrive

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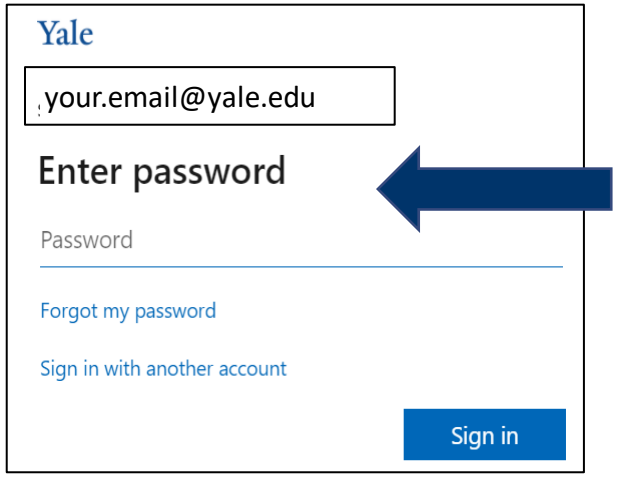
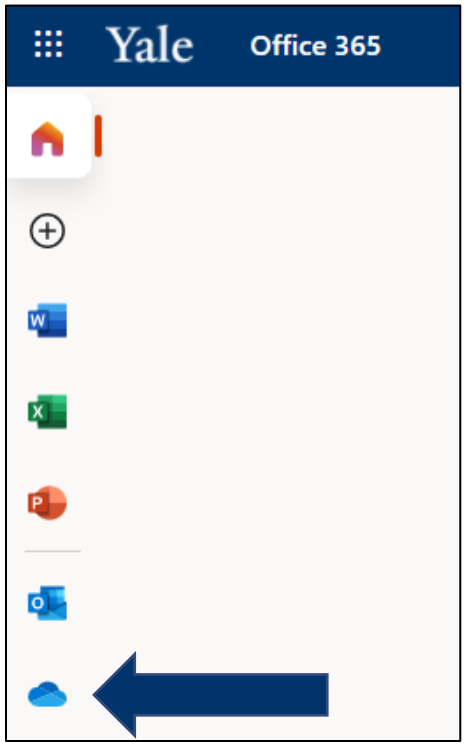
Log in to OneDrive with your Yale email address and password to begin securely transferring files.





Setting Up a Secure Files Transfer Folder in OneDrive

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Setting Up a Secure Files Transfer Folder in OneDrive

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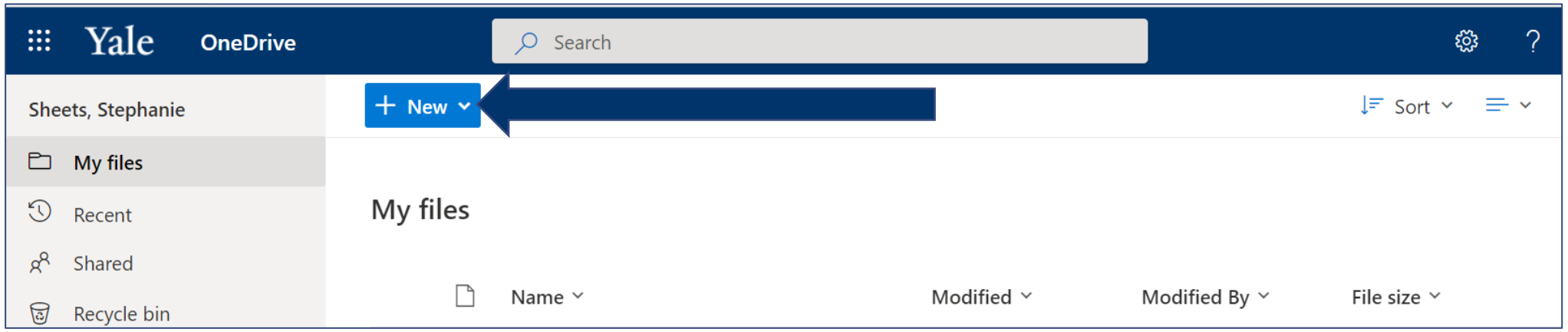
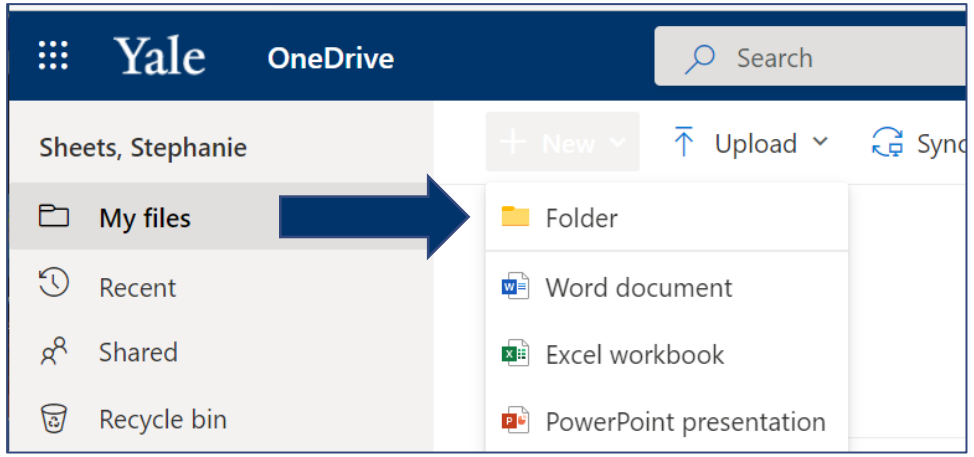
1. Select the **New** menu and choose the **Folder** option.





Setting Up a Secure Files Transfer Folder in OneDrive

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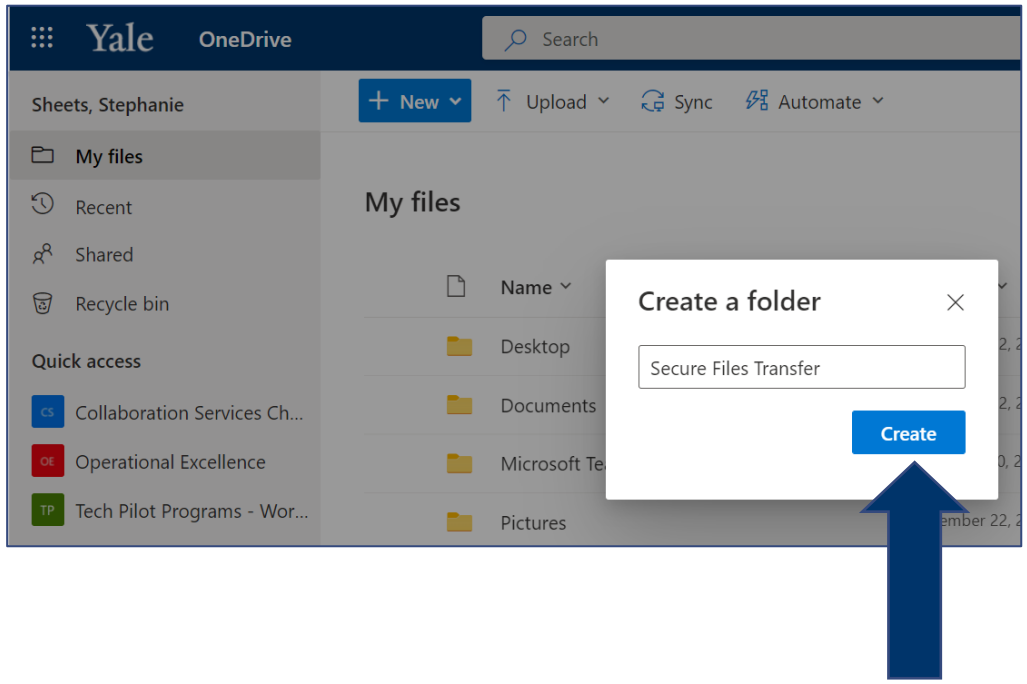
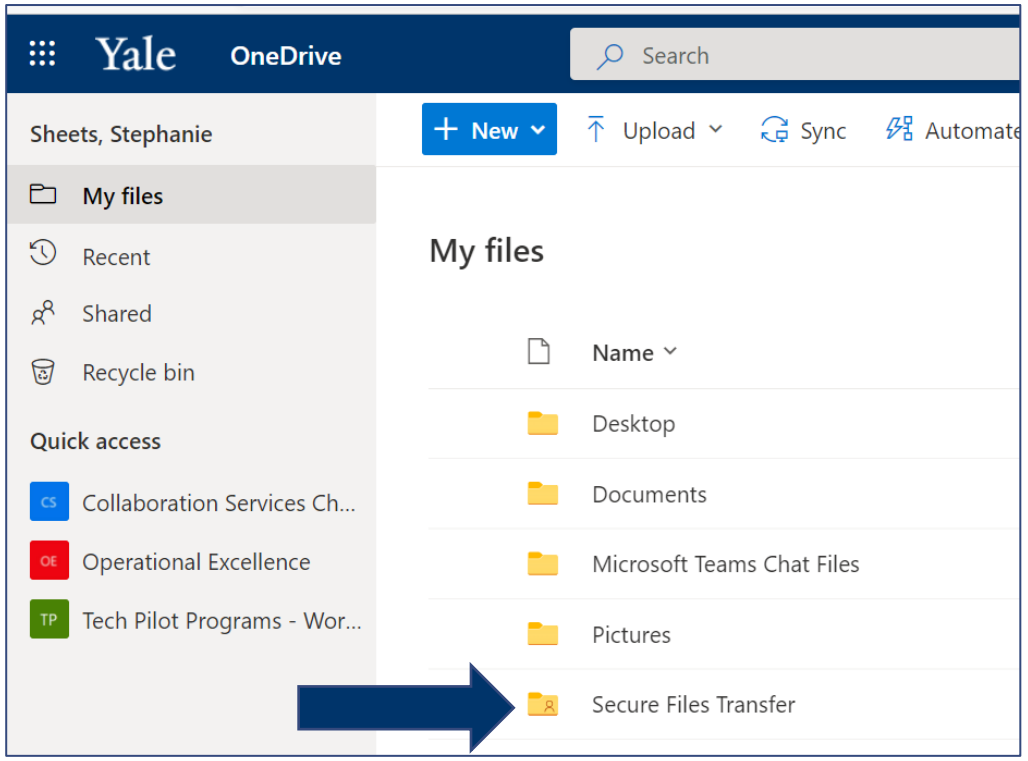
2. Name the folder **Secure Files Transfer** then select the **Create** button.





Setting Up a Secure Files Transfer Folder in OneDrive

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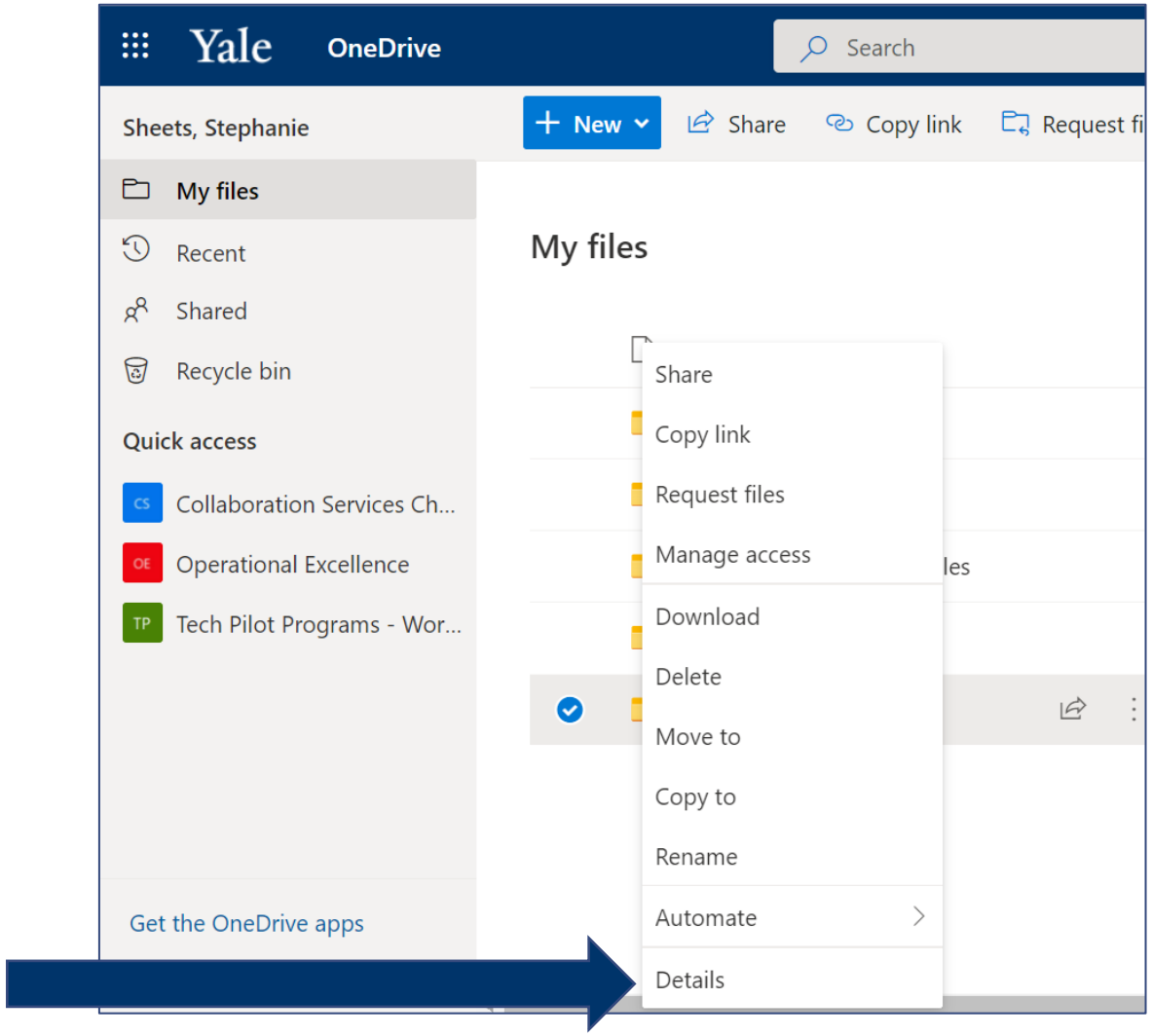
3. Right click on the new **Secure Files Transfer** folder and select **Details** from the menu.



Setting Up a Secure Files Transfer Folder in OneDrive

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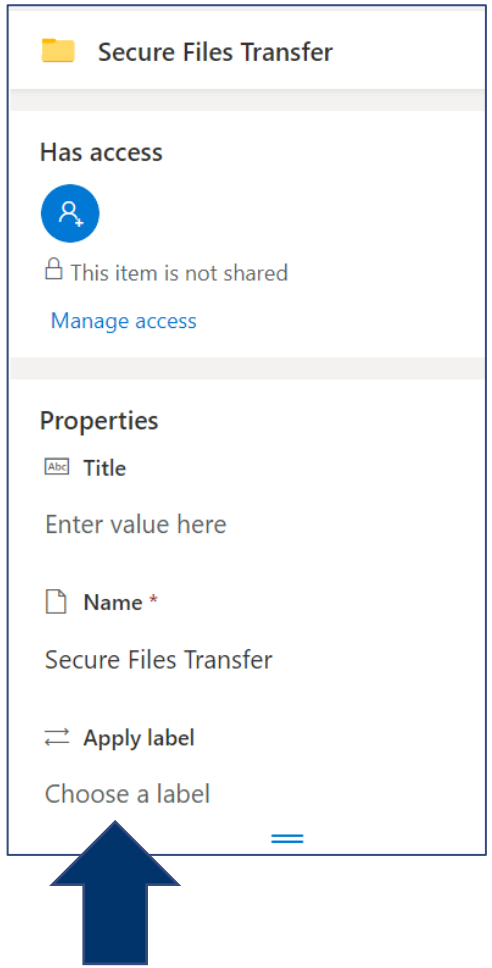
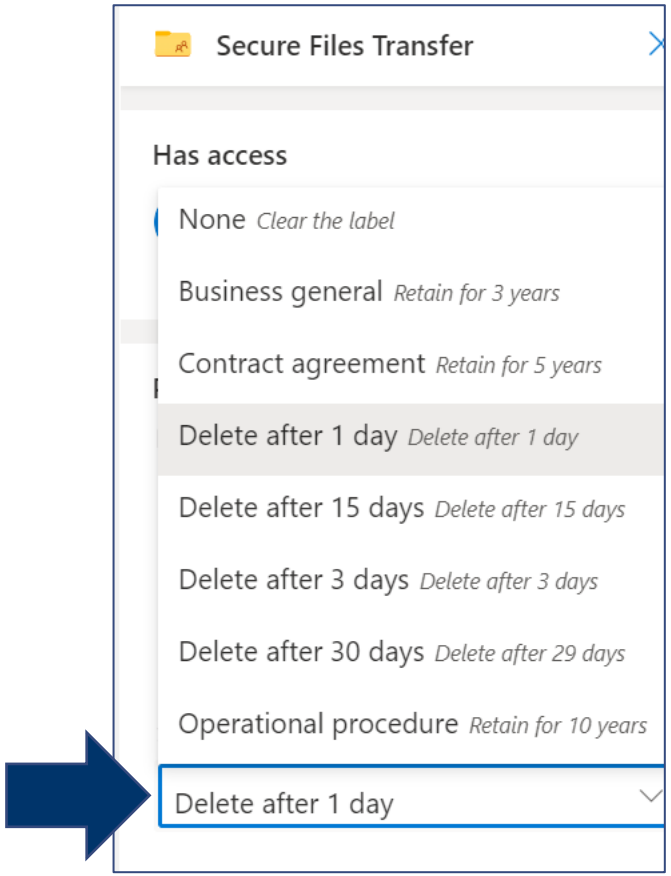
4. Under **Apply label, Choose a label** to identify when the file should be deleted.





- You can set up multiple folders with different retention labels.
- Any files you place in this folder will automatically be labeled and deleted on the specified date.
- It may take up to 7 days from when the retention period has passed for the files to disappear from the folder.

Your secure files transfer folder is now ready to use.

Request a File Upload from an Individual in OneDrive

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Requesting a File Upload from an Individual in OneDrive

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With the file request feature in OneDrive, you can request a file upload and receive file upload requests to share files securely.

- Anyone can send you a file, even if they don’t have a OneDrive account.
- Those who respond to your request can only upload. They do not have access to your OneDrive.
- Files uploaded to your OneDrive can be moved to Teams or SharePoint if you’d like.

Requesting a File Upload from an Individual in OneDrive

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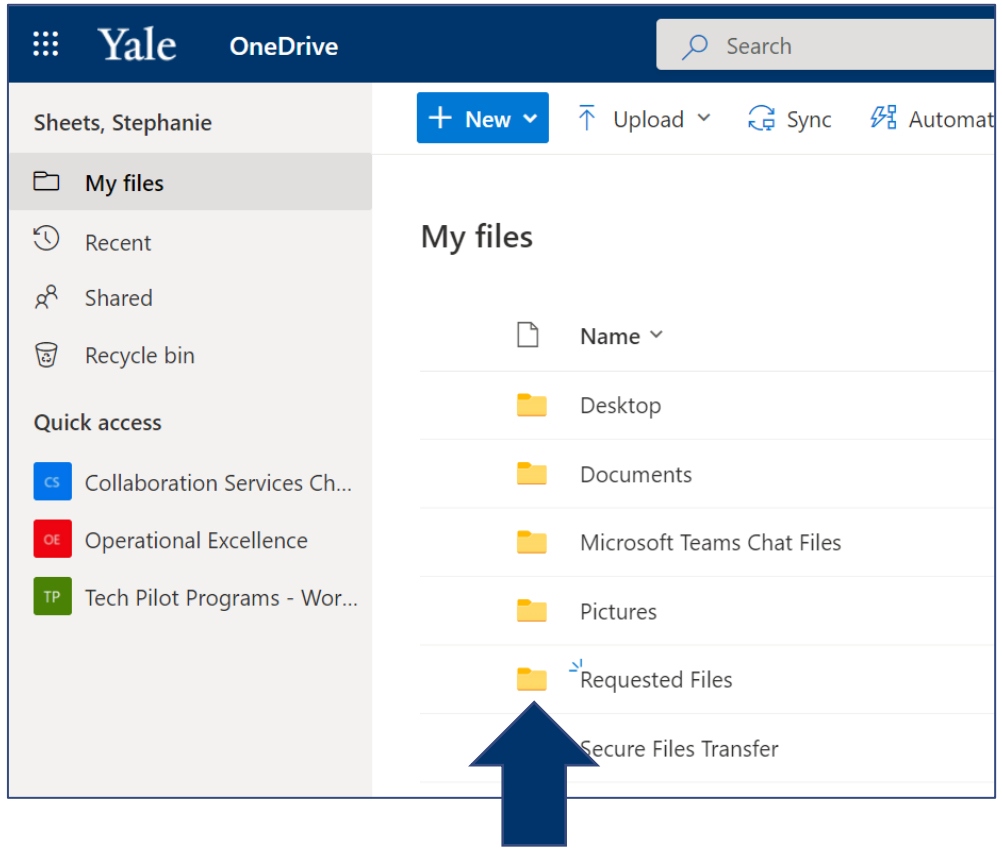
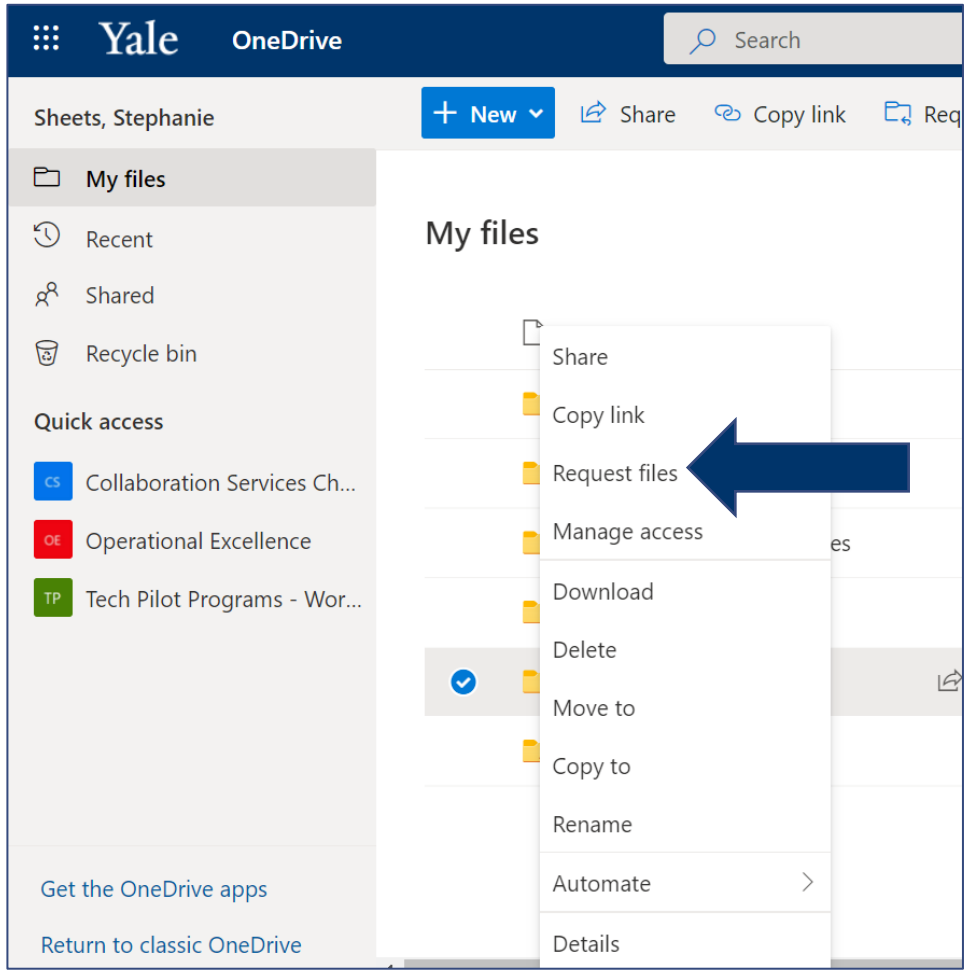
1. Select the folder where you want the files to be uploaded, and then select the **Request files** button.





Requesting a File Upload from an Individual in OneDrive

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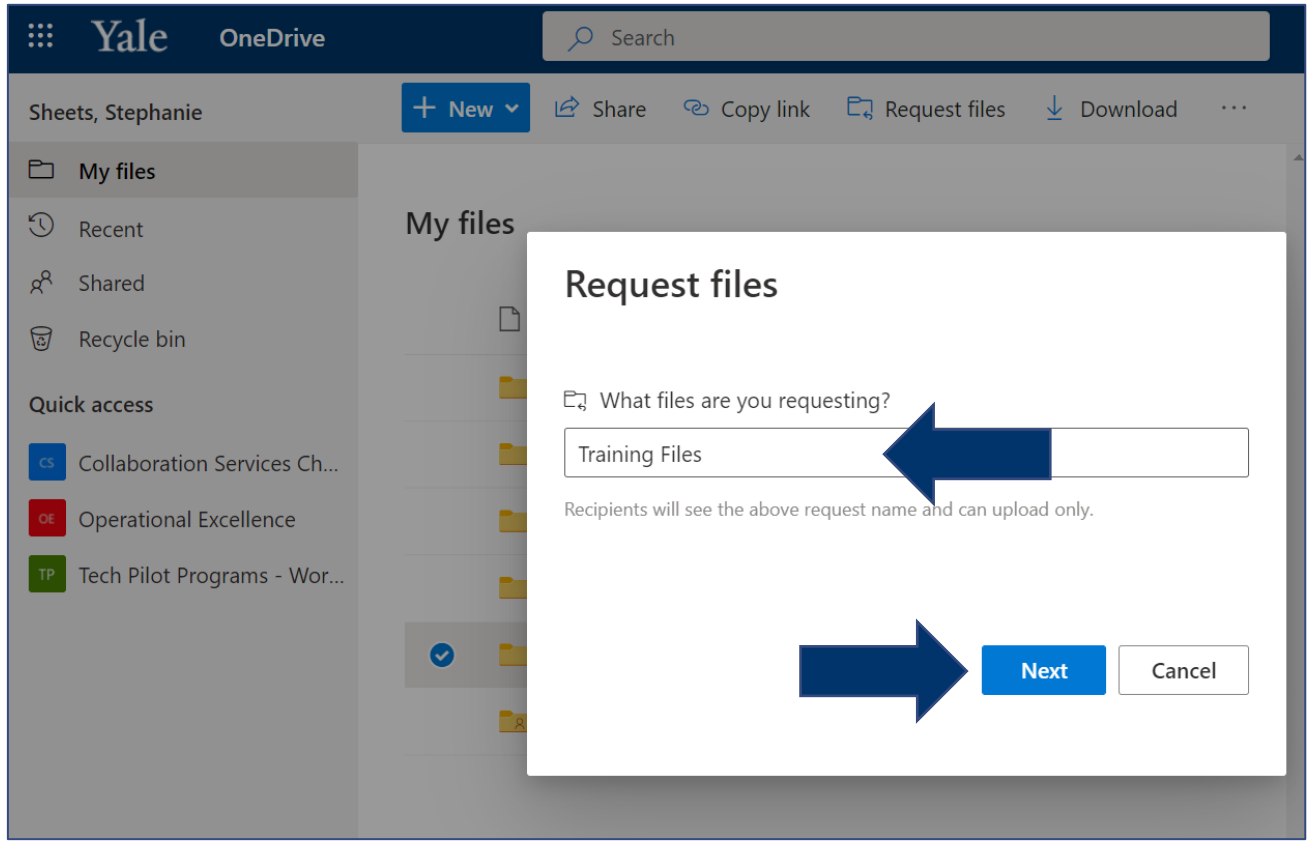
2. Under **What files are you requesting**, enter a descriptive name for the requested files. The person you request the upload from will see this name in the file request.

Select **Next**.



- If you want to edit the descriptive name of the file request, select the folder and click **Request files** again, then change the name.

Requesting a File Upload from an Individual in OneDrive

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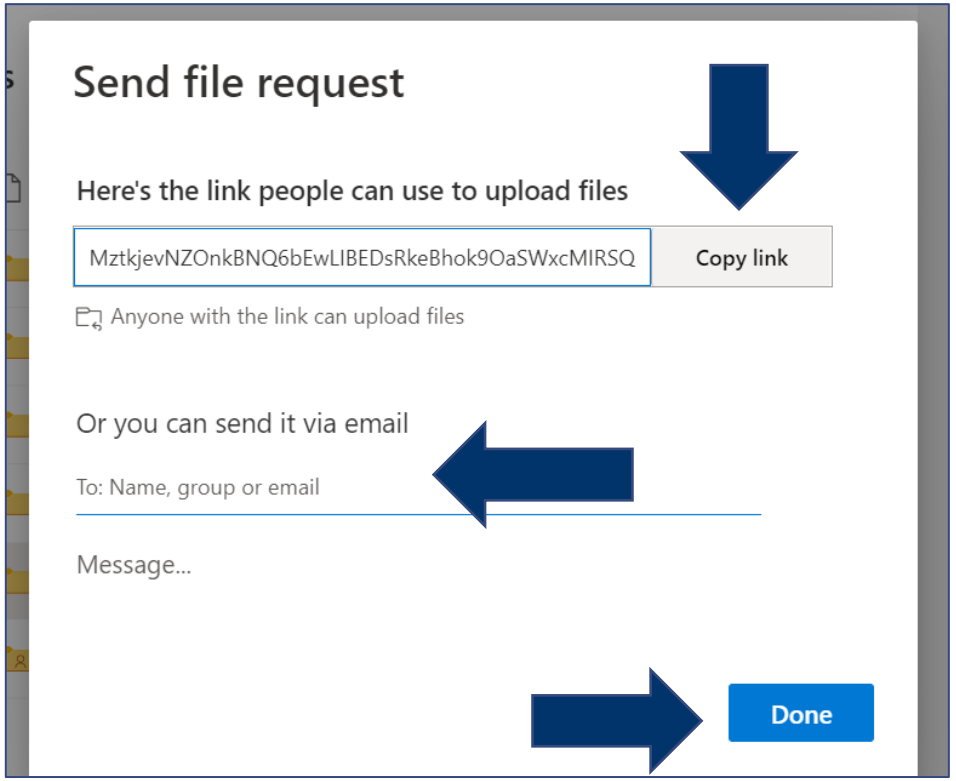
3. Choose one of the two following options and click **Done**.

a. Select **Copy link** to copy the request link and email it to anyone you would like to request files from or;

b. Enter the email address(es) of the individual(s) you want to request files from. You can also add a message to the email that OneDrive sends them.



You will receive a notification email whenever someone uploads files to your file request folder.

Receiving a File Upload Request

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Receiving a File Upload Request

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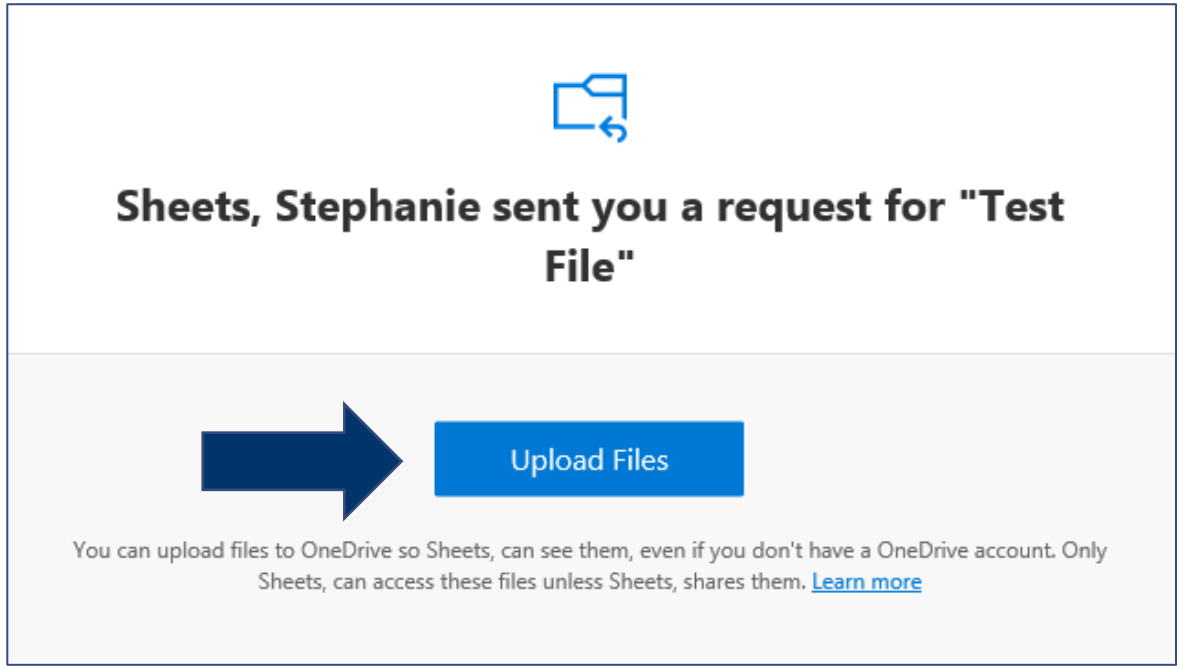
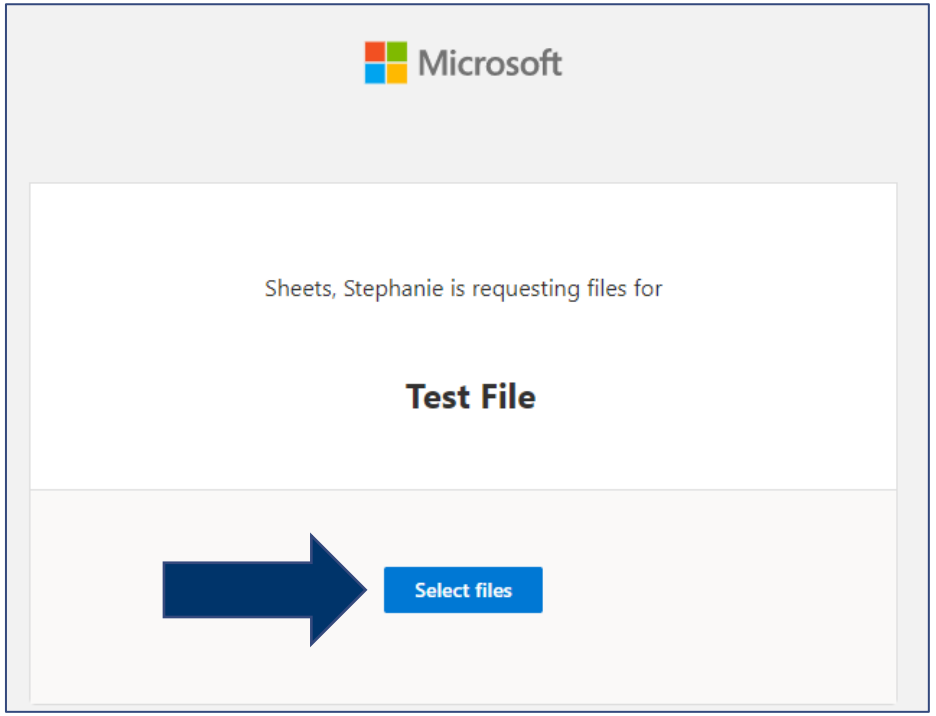
1. Click on the **Upload Files** link to see the details of the file upload request, then click **Select Files**.





Receiving a File Upload Request

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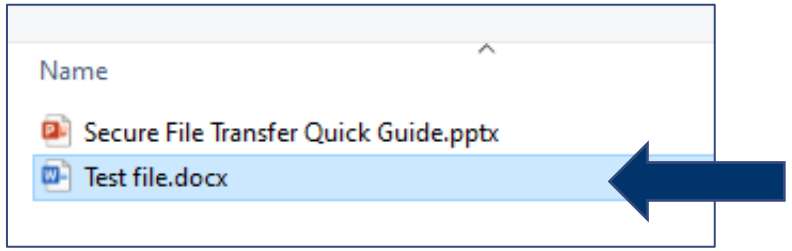
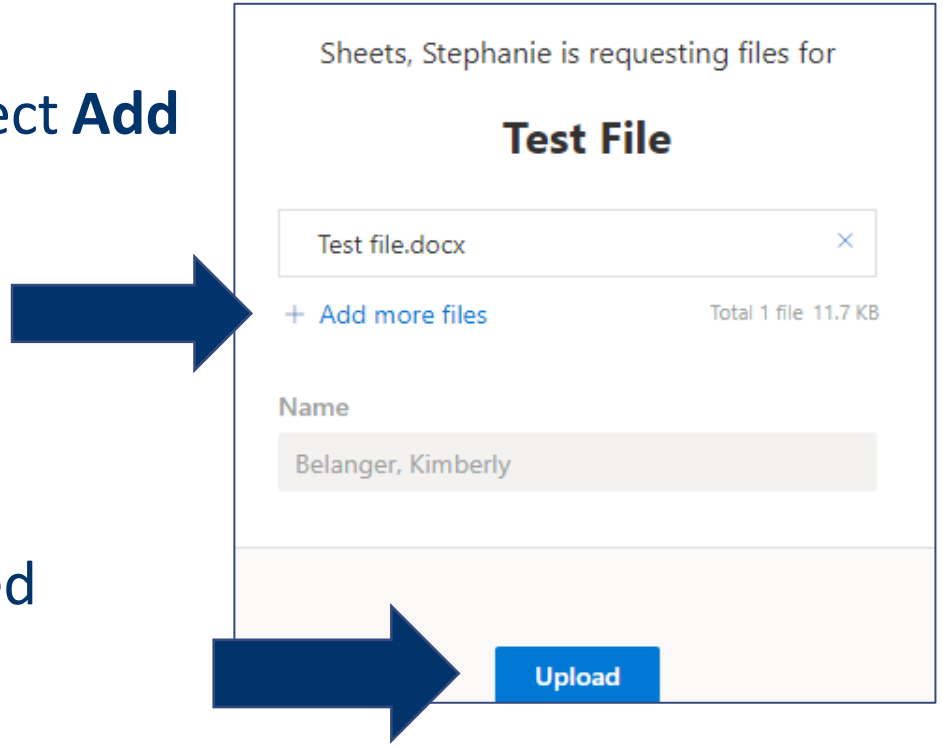
2. Browse to the appropriate folder and select the requested file.



3. If you need to add additional files, select **Add more files.**



4. When you've selected all the requested files, click on **Upload**.

Receiving a File Upload Request

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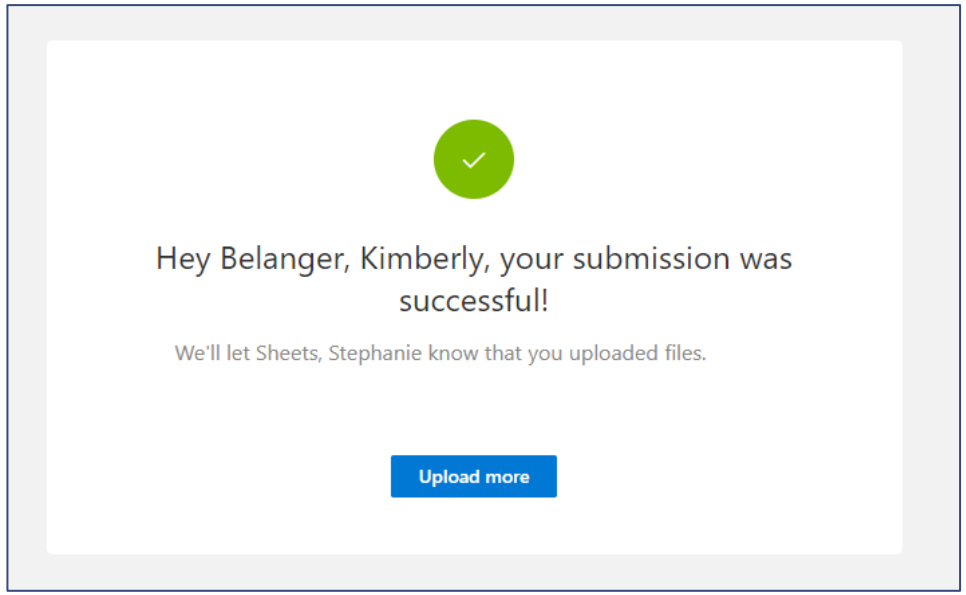
5. Upload requested files.

Please Note:

- If the request responder is a signed-in Office 365 user their identity is automatically recorded as part of the upload.
- If they are not a signed in Office 365 user, they will be asked to add a first name and last name to help identify the different files uploaded. The provided first name and last name are not validated; it is purely for the requestor's convenience and is not a guarantee of identity when the recipient is not signed in.

Recipients will get an email notification once their files are successfully uploaded.



Stop Receiving/Requesting a File Upload in OneDrive

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Stop Requesting a File Upload in OneDrive

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You can stop requesting files at any time by deleting the file request link.

- People will not be able to upload files the folder once the link is deleted.
- This function cannot be undone. If you need to start collecting files in this folder again, you must create a new file request on the folder and send recipients a new link or email invitation.

Stop Requesting a File Upload in OneDrive

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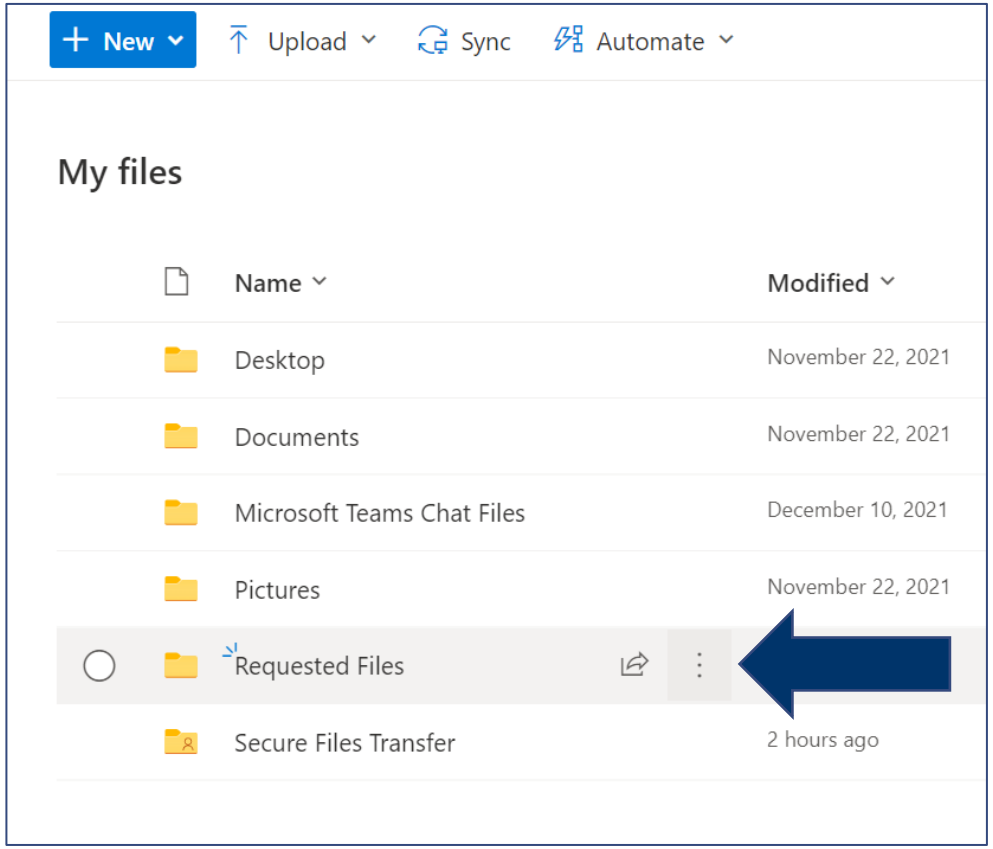
1. Right click on the folder you requested the file upload in.



Stop Requesting a File Upload in OneDrive

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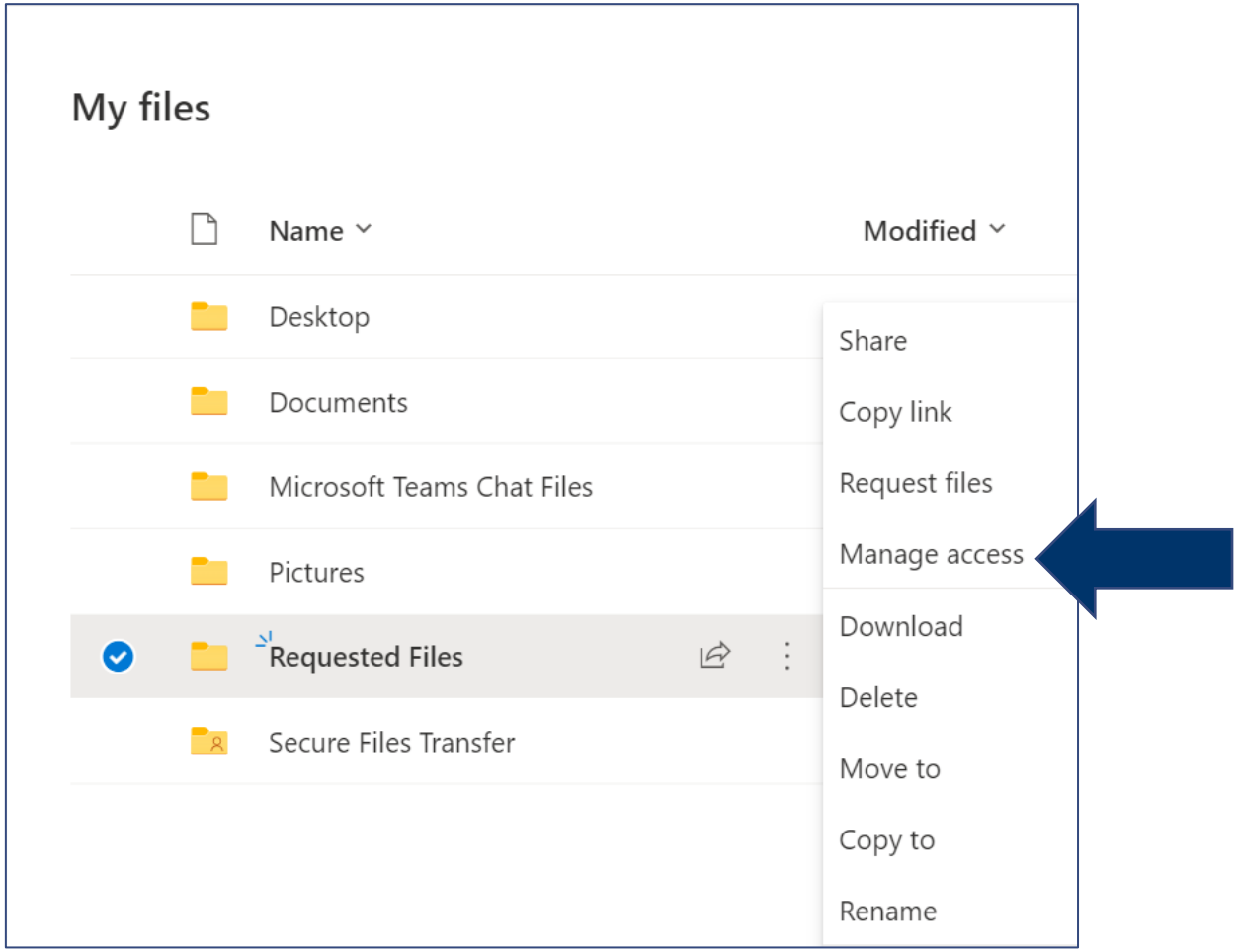
2. Select **Manage access**.



Stop Requesting a File Upload in OneDrive

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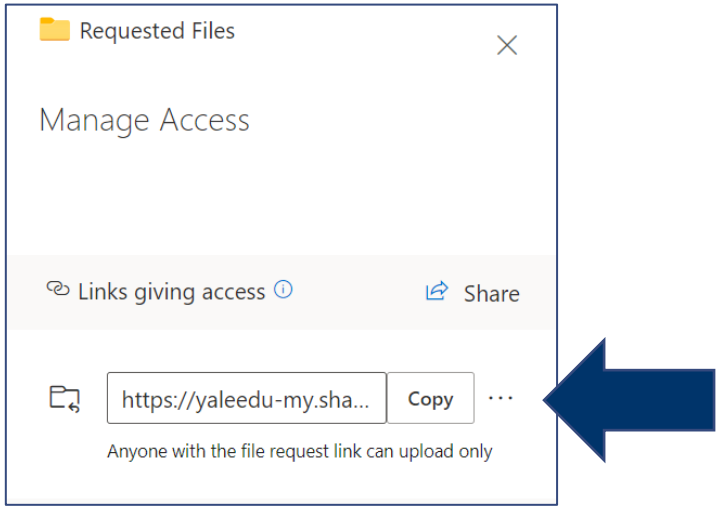
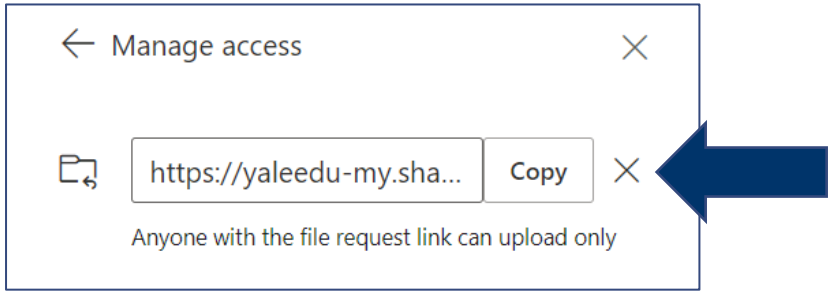
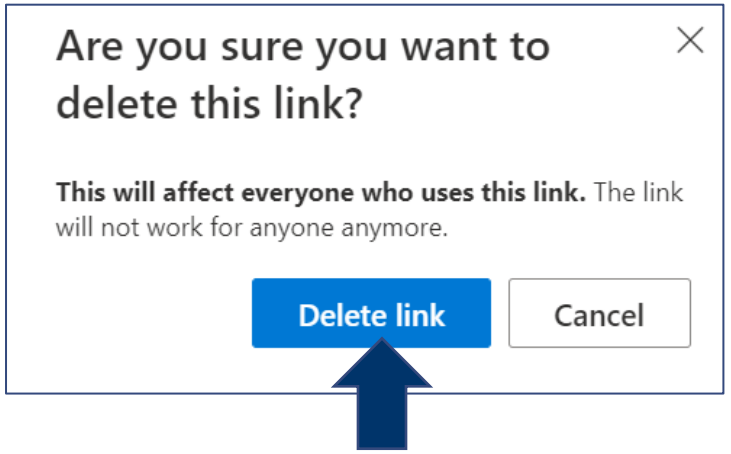
3. Select the [...] menu beside the request link in the **Links Giving Access** section.



4. Click **X** next to the link.



5. Click **Delete link.**



Sending/Receiving an Encrypted Email

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Sending an Encrypted Email Overview

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Email encryption provides an additional layer of security when members of the Yale community send email using Outlook Web and Desktop Apps.

It converts the message from readable plain text into scrambled ciphertext. Only the intended recipient can view the message. Attachments are also encrypted.

Use email encryption when transmitting confidential data within the Yale community and externally.

Examples of confidential data that should be encrypted when transmitted by email:

- Social Security numbers
- Protected health information
- Clinical trial data
- Service account passwords
- Credit card numbers
- Grades for assignments and courses
- Trade secrets
- Disciplinary records
- Salary and tax records

***Please note** that the **Outlook Mobile App** does not support sending/receiving encrypted emails with files within the Yale community and externally.

Sending an Encrypted Email Using Outlook Web App

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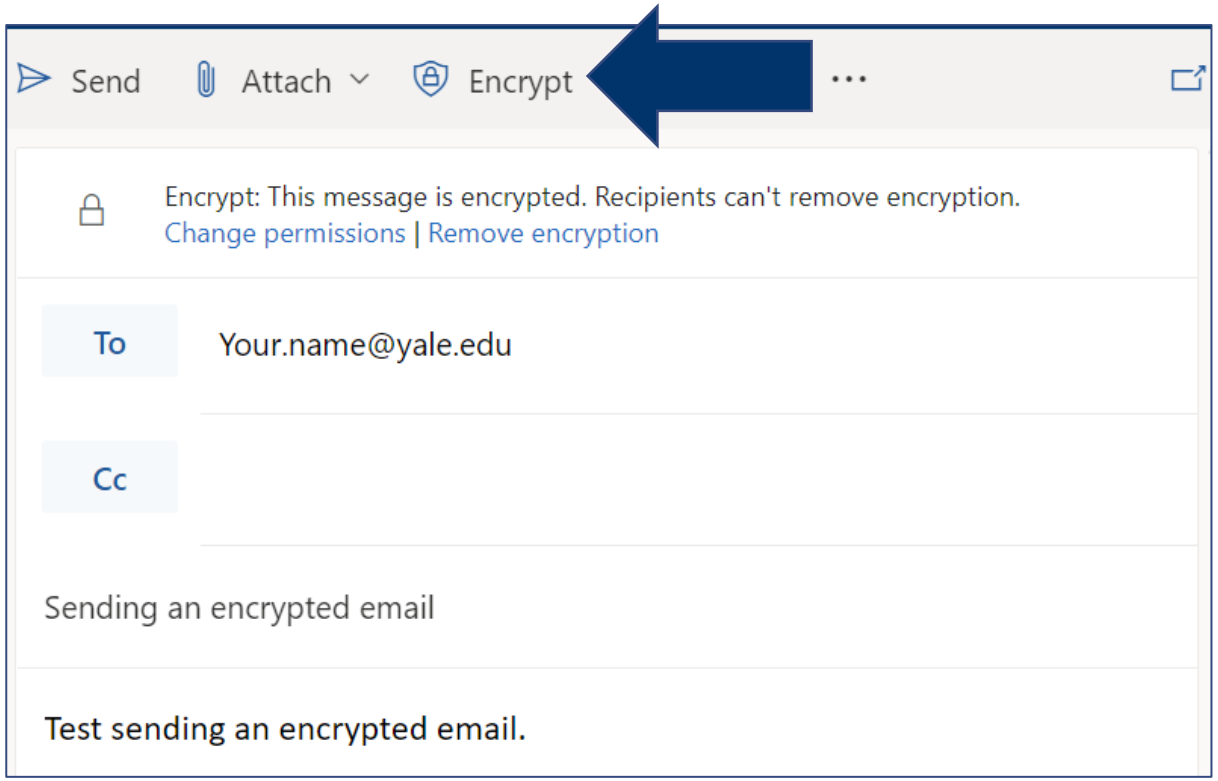
1. Log into the Outlook Web App and compose your message.

2. Select the **Encrypt** button. This will ensure the message when sent will be encrypted so only individuals in the To or CC fields will be able to read it and open attached files.



Sending an Encrypted Email Using Outlook Web App

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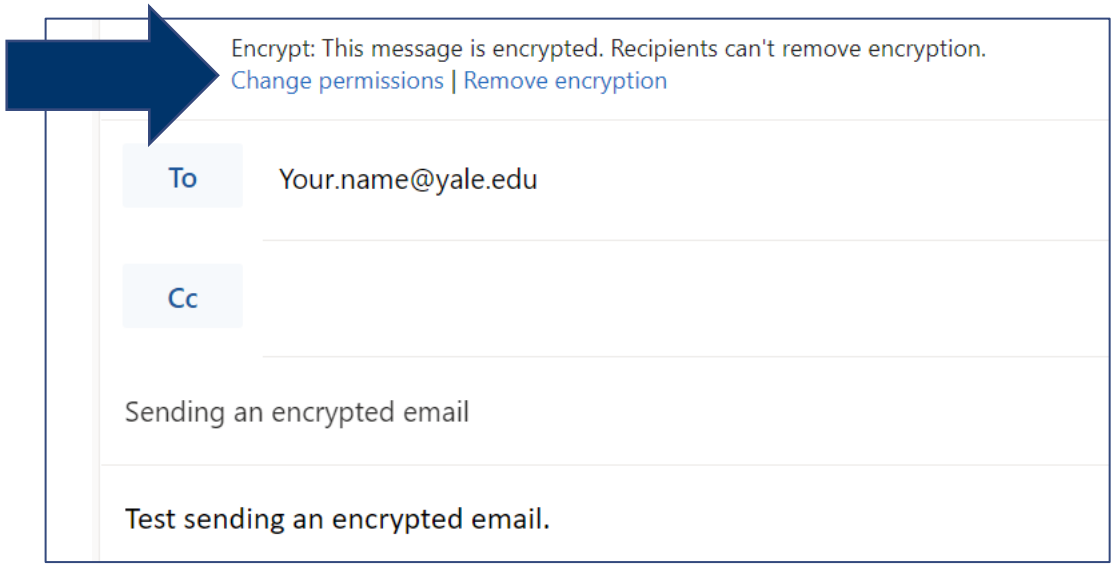
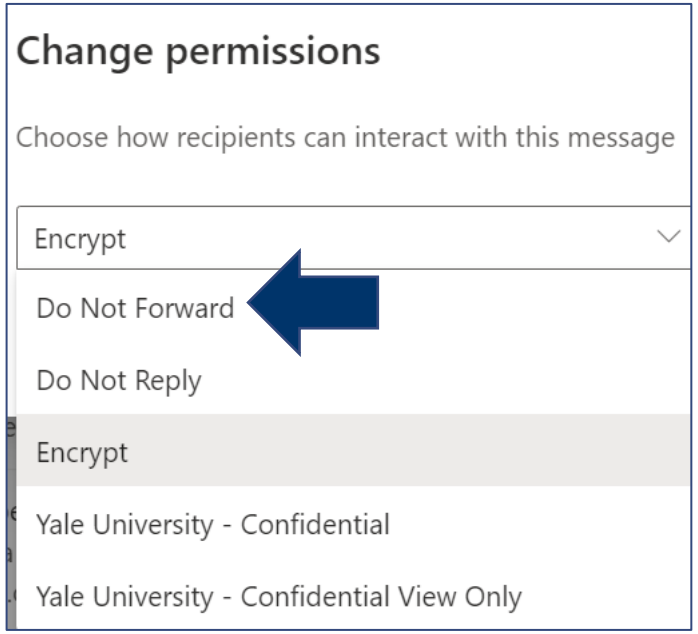
3. You can also click the **Change permissions** link and select **Do Not Forward** if you want to prevent the message from being forwarded, and to prevent the content from being copy/paste or screen printed into another message or document.





4. Send the email.

Sending an Encrypted Email Using Outlook Desktop App

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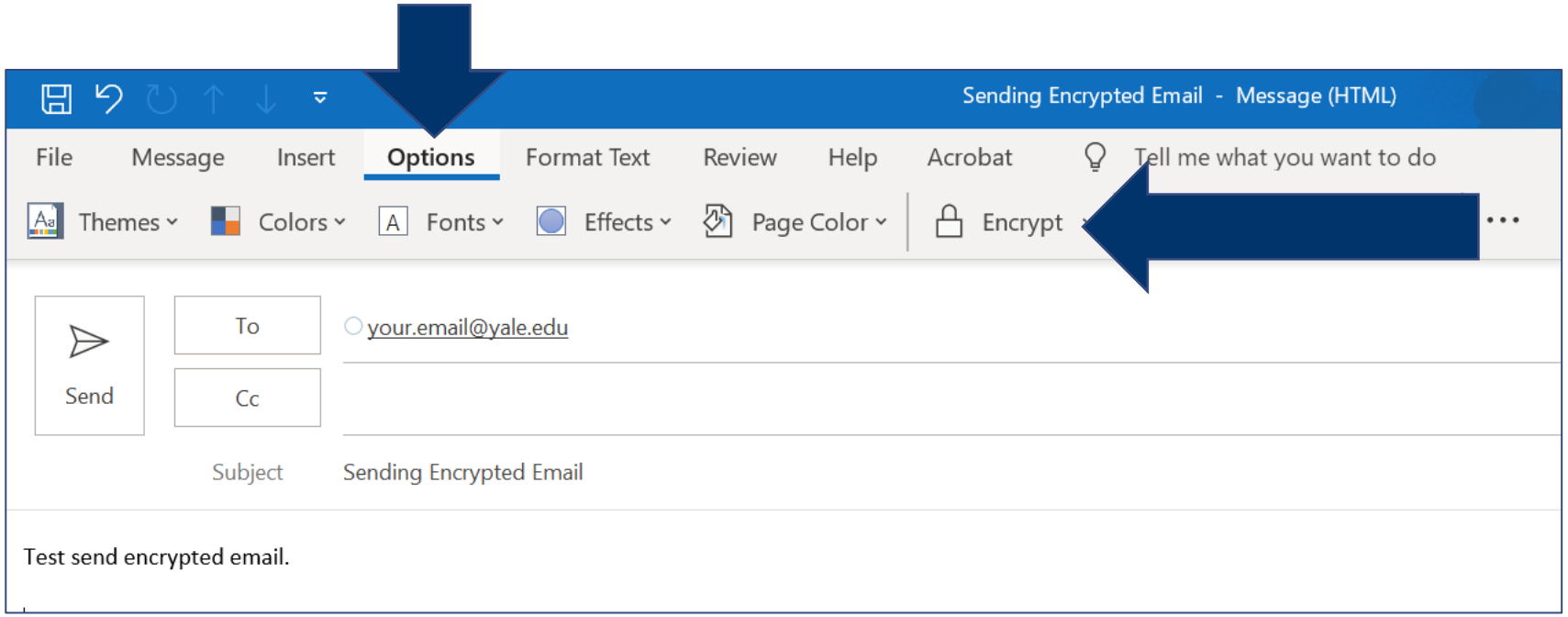
1. Open your **Outlook Desktop App** and compose your message

2. Select the **Encrypt** button from the **Options** tab. This will ensure the message when sent will be encrypted so only individuals in the To or CC fields will be able to read it.



Sending an Encrypted Email Using Outlook Desktop App

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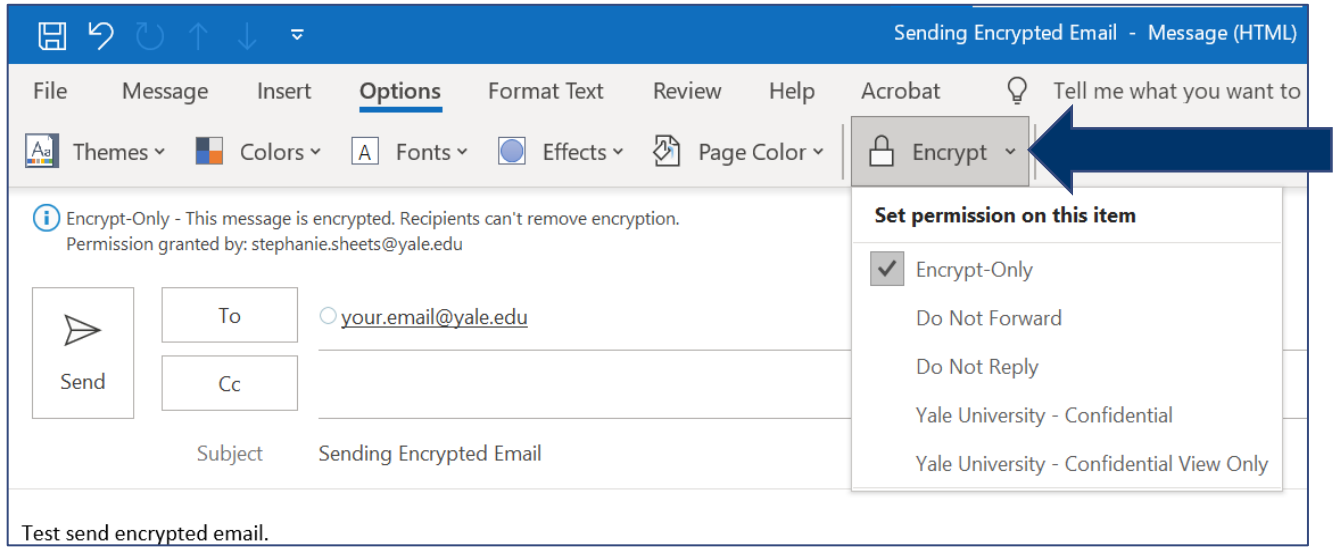
3. Click on the arrow on the **Encrypt** button to set permission settings for this email.



- The **Do Not Forward** option encrypts the message and prevents the message from being forwarded and its content copy/pasted, or screen printed into another message or document.

4. Send the email.

Receiving an External Encrypted Email in Outlook Web or Desktop

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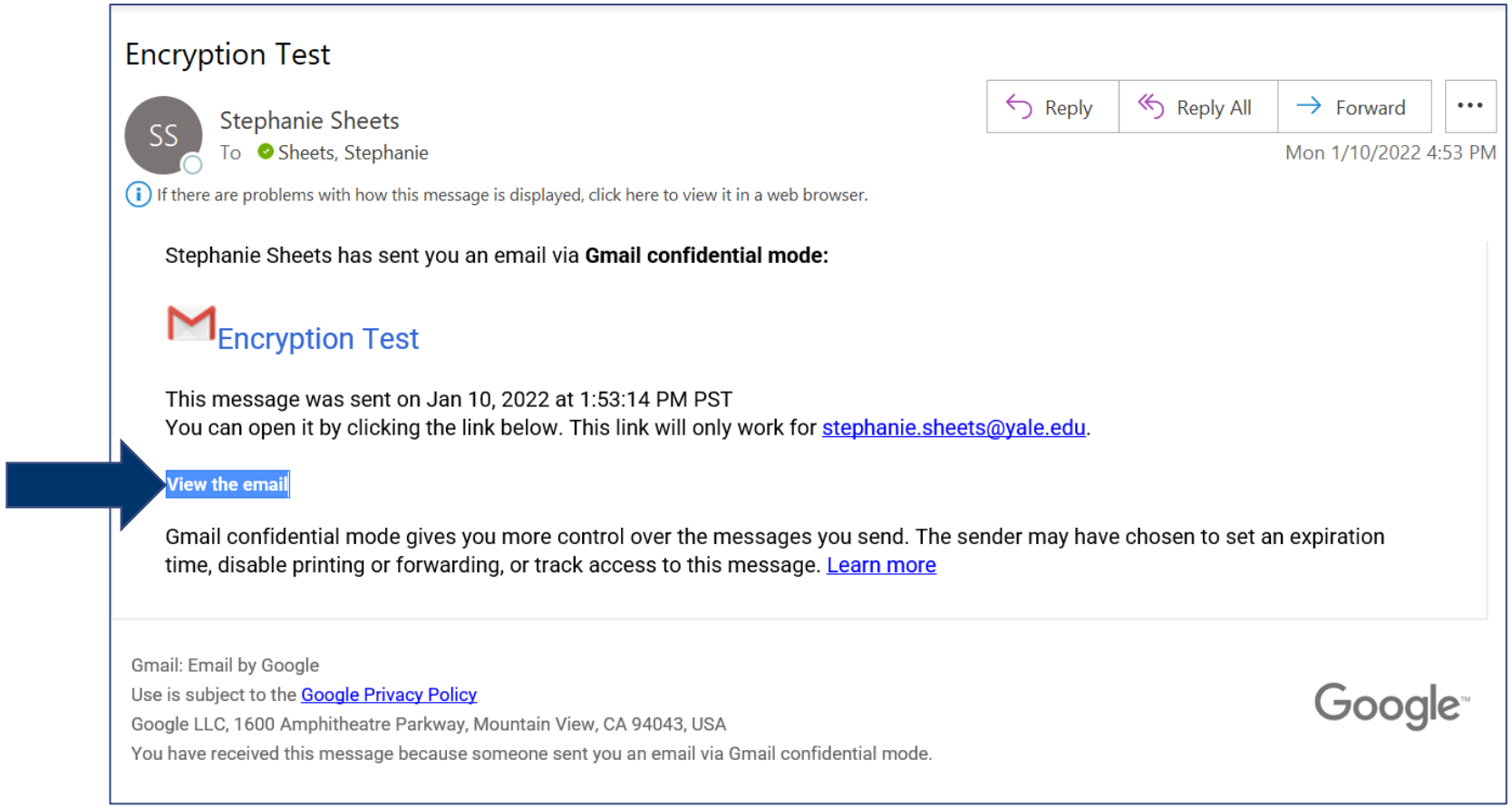
The process applies to receiving an encrypted email from an external (Non-Yale) email.
Encrypted Yale emails will open the same as non-encrypted emails.

1. Open the email message as instructed.



Receiving an External Encrypted Email in Outlook Web or Desktop

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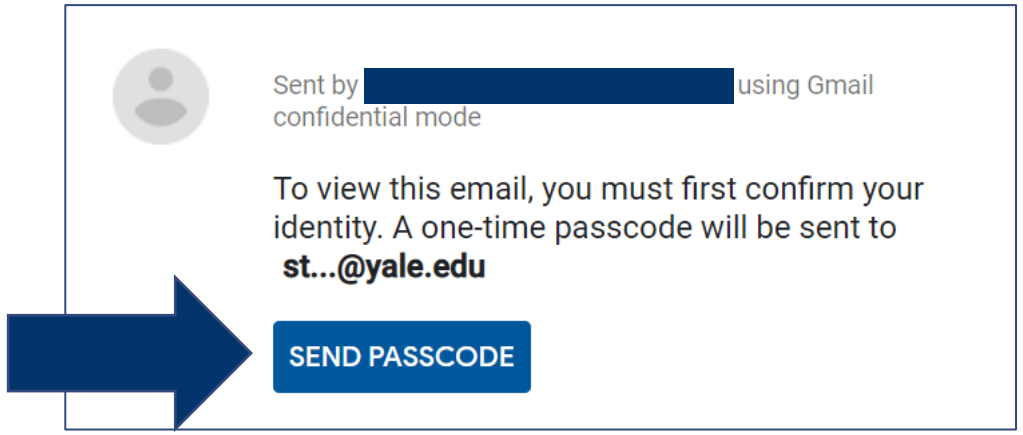
2. Follow the prompts to use a **one-time passcode**. A passcode is sent to you in an email message.



Note: Each passcode expires after 15 minutes. If that happens, or if you can't open the message for any reason, start over by opening the attachment again and following the steps.

Receiving an External Encrypted Email in Outlook Web or Desktop

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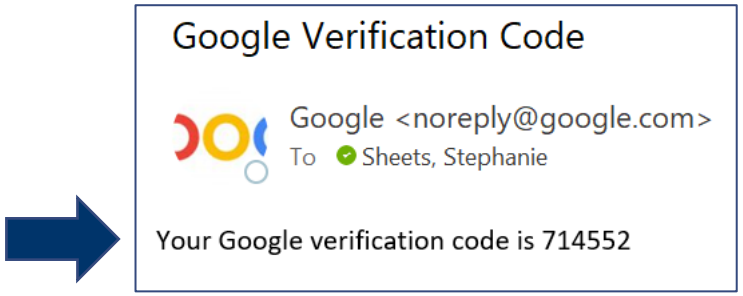
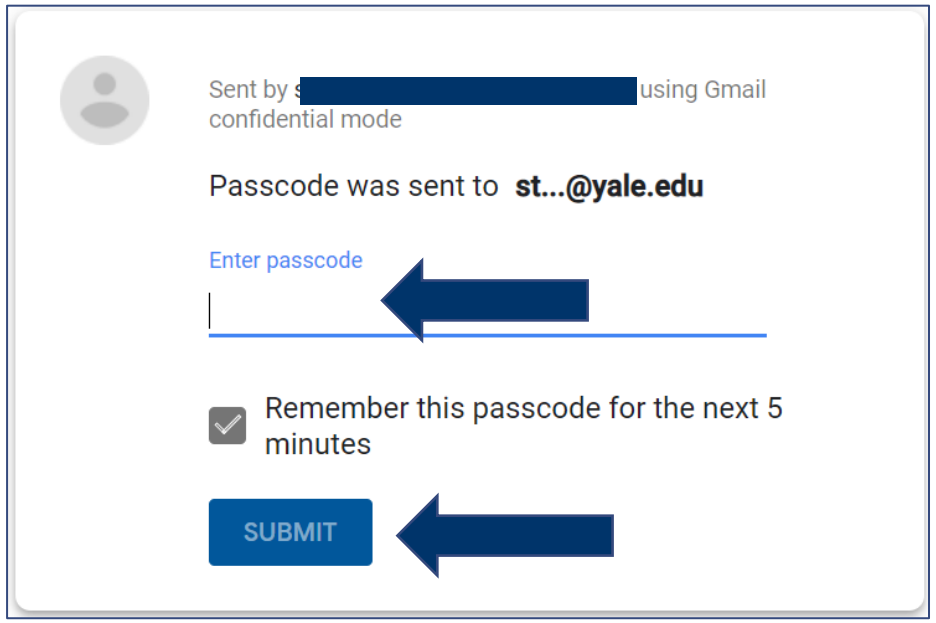
3. Return to your email and retrieve the passcode.



4. Return to the message, enter the code and select **Submit**.



You can now view your message.

Receiving an External Encrypted Email in Outlook Mobile App

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1. Open the message using the email app on your mobile device as you normally would.
2. Select the **Read the message** button.
3. Select **Sign in with a one-time passcode**.
(Note: Each passcode expires after 15 minutes. If that happens, or if you can't open the message for any reason, start over by opening the attachment again and following the steps.)
4. The passcode is sent to you in an email message.
5. Enter the passcode provided, and then select **Continue**.
6. You can now view your message.

Sending/Receiving Encrypted Email Using EliApps

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For University EliApps email account holders, email encryption provides an additional layer of security when members of the Yale community send email using EliApps.

Email encryption converts the message from readable plain text into scrambled cipher text. Only the intended recipient can view the message. This process also encrypts any attachments sent with encrypted messages.

You should use email encryption when transmitting confidential data to any email address that is not a Microsoft 365 yale.edu or ynhh.org.

EliApps (Google Apps for Education) is considered an external service provider. Other examples of external email providers include AOL, Comcast, Gmail, and Yahoo! Important examples of confidential data that should be encrypted when transmitted by email:

To learn how to send or open encrypted email, follow the directions provided by Google.

Resources

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- To share a new file/message:

  Set up a secure file transfer folder in OneDrive to share files or folders

  Request a file upload from an individual using OneDrive

- Use email to send a secure message when you have sensitive information to share:

  Microsoft 365 mail users– Microsoft 365: Sending/Receiving an encrypted email - IT at Yale (service-now.com)

  EliApps mail users – EliApps Google Apps for Education: Send and open encrypted emails - IT at Yale (service-now.com)

- OneDrive for Business Best Practices, How-To's, and Support Information

- Microsoft 365: Restrictions and limitations in OneDrive