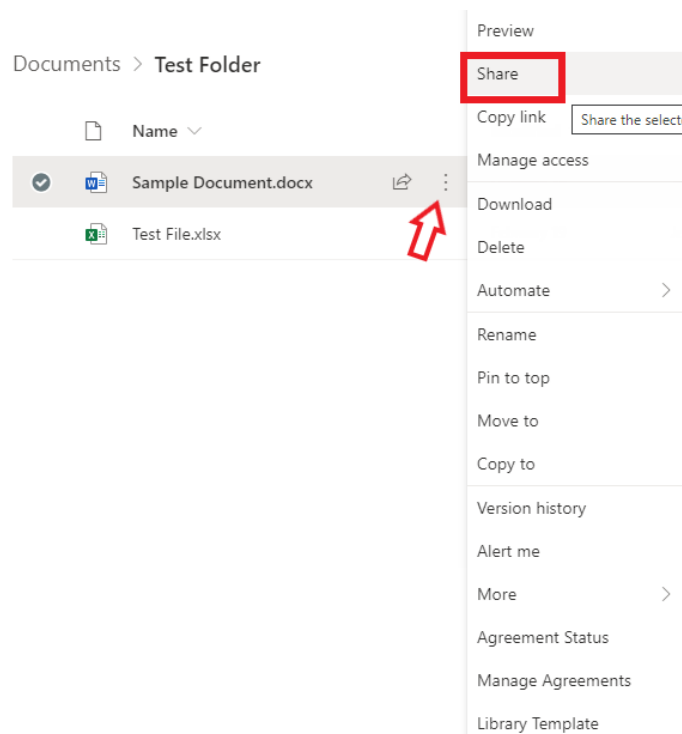


Properly Sharing Documents in SharePoint/OneDrive

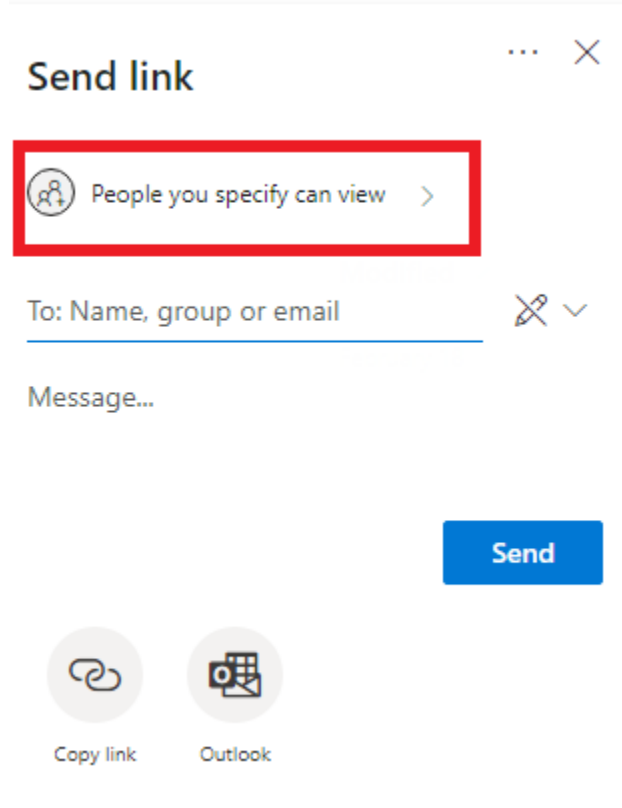
Understanding how to properly share a document in SharePoint is extremely important, it will ensure data integrity and prevent the document from being shared with unattended users. The **“Share”** button and **“Copy Link”** button in Share Point do the same thing, they are just two different ways to deliver the document being shared. Please share the document only one way, either the **“Share”** button that will create an email message with the link in the email, or **“Copy Link”** that will generate a link that can be Copy + Paste anywhere.

Using the Share button (Using the share button will allow you to send a message as an email to the user with the link inside the email. You will have the ability to add a message to the user.)

1. Find the document you would like to share and select the **three dots** then select **“Share”**.



2. When you select share you will then see the “Send Link” screen.



3. ***Important Part*** Select the **Link Settings** button (outlined above) in the middle of the “Send Link” screen if you want to change it from the current default option. You will be presented with a selection like below. Under “**Who you would like this link to work for?**” you will be given various options.
- Anyone with the link:** This will allow any person who has the link to the specific folder/document to access it regardless of who they are. When using this setting please make sure to set the link to expire and set a password unless the information is intended for public view.
 - People in Marist University with the Link:** When this is selected anyone with a Marist account can open this document. This includes if the link is forwarded to another Marist user they will be able to open the document.
 - People with existing access:** This link will only work for people who are part of a particular SharePoint group and/or who already have access to the Document/ Folder (inside OneDrive), but lost the link.
 - *Specific People:** * This is the preferred choice since it only allows the people you specify to have access to this link; it is also the **most secure choice and default option.**

Other Settings

1. **Allow Editing:** This is the picture of the pencil next to the name line. When this has no slash going through it, it will allow whoever this is being shared with, to edit the document. To restrict editing, make sure you have a slash going through the pencil. When you expand the area to manage access, you will also see the check box to toggle editing on/off. **Do not allow editing if you are not collaborating.**
2. **Review Mode:** Allows the user to only make suggestions and leave comments to the document.
3. **Block Download:** Turning this on will disable the user from downloading a copy of the document. Block download will only work when sharing a document, not a folder.

Link settings

Who would you like this link to work for?

[Learn more](#)

Anyone with the link

People in Marist College with the link

People with existing access

Specific people

✓

Other settings

☐

Allow editing

Open in review mode only

☐ ⓘ

Block download

☒

Apply

Cancel

4. Once you have selected the permission level for the document you are sharing, insert the user's name or email address like below and click **"Send"**.
Add a Message: This will allow you to add a message to the email with the link in it.

Send link

...

×

 People you specify can view >

 Miranda Marist

×

Add another  

Message...

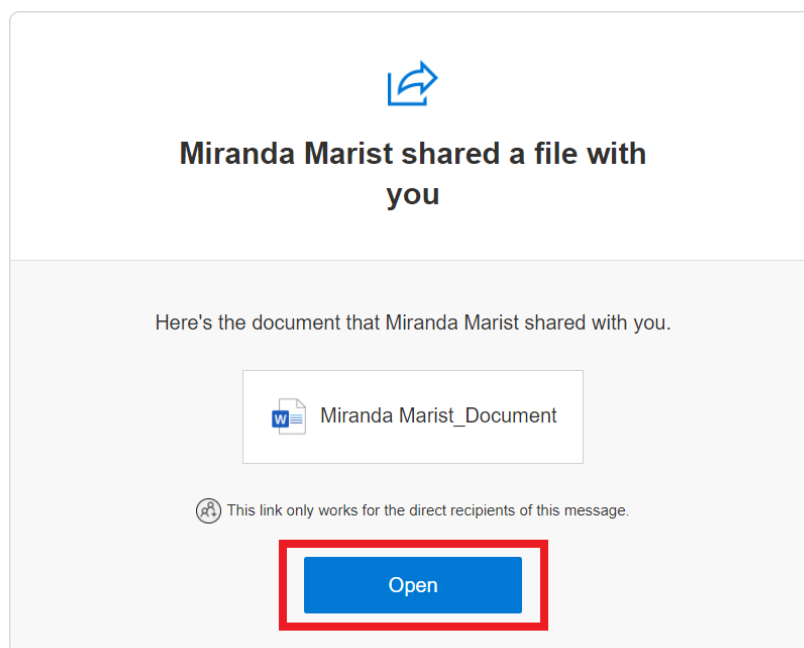
Send

 Copy link

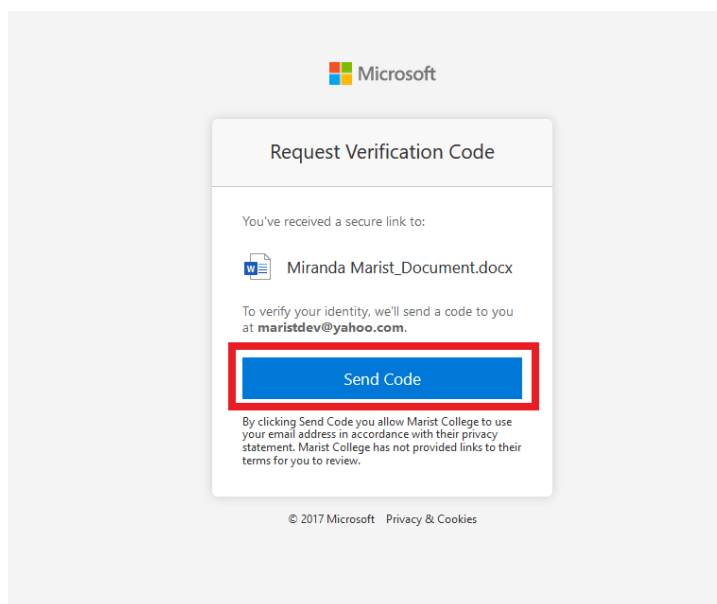
 Outlook

Open OneDrive Files Received Via Open Link

1. The user will receive an email stating that a file has been shared with them. The user will then click on the Open button to open the document being shared with them in a new tab. If the user is **External** to Marist see Steps 2-4.

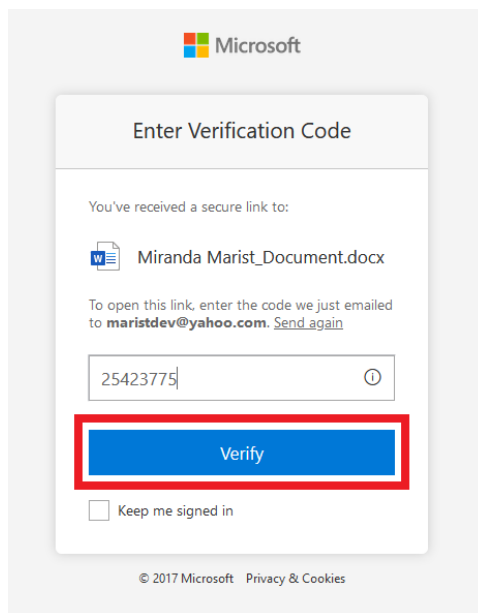
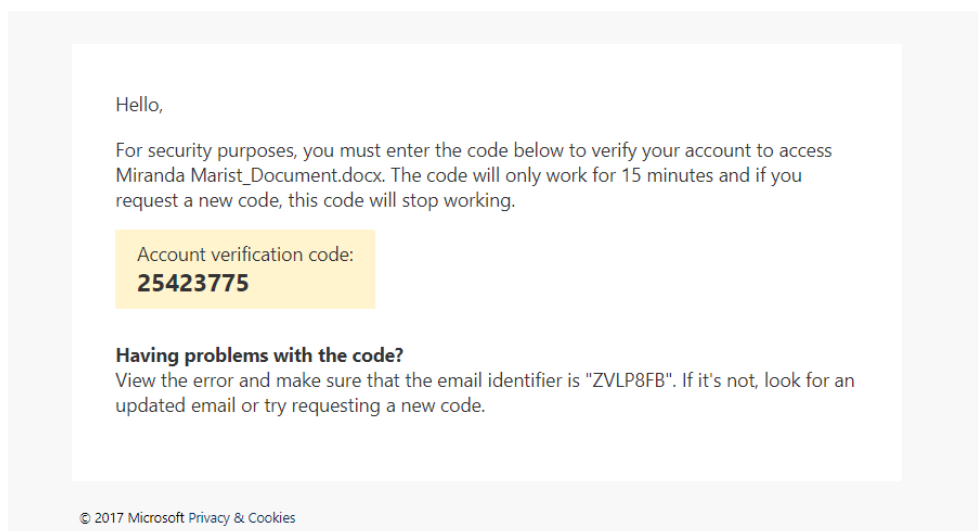


2. If the user is **External** to Marist, you may be brought to a screen like below, verifying it is you.



3. Click on **Send Code**, a code will be sent to the email address that the document was shared with. You will receive an email like the picture below copy and paste the Verification Code in the box. Please make sure to check the **Spam folder**, just in case the email does not end up in the Inbox.

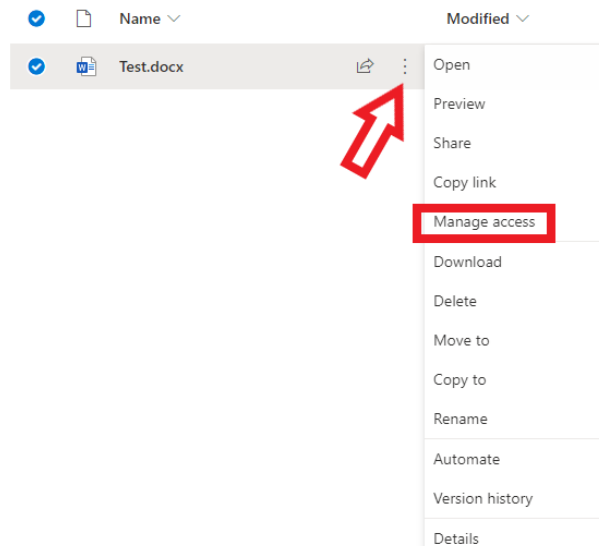
OneDrive



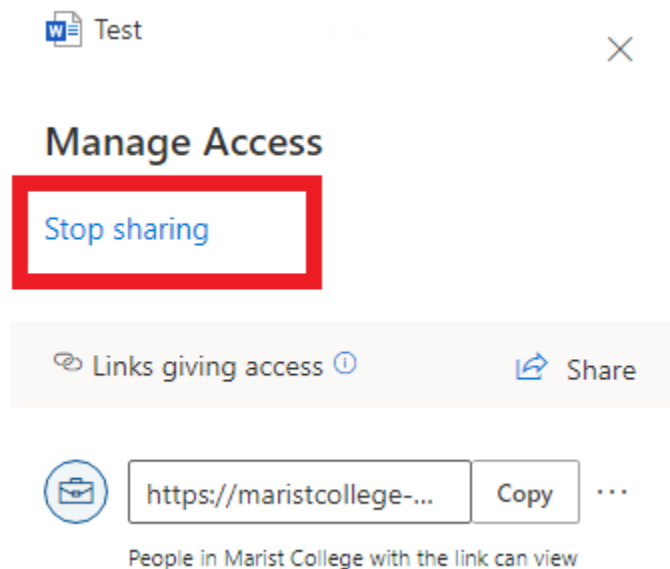
4. Once you click **Verify**, the document you are trying to access will automatically load in the web browser.

To Remove Access

1. Select the document or folder, select the **“Three Dots”**, and select **“Manage Access”**.



2. Towards the top of the Pop Out from the Right select **“Stop Sharing”**.



3. Click on **"Stop Sharing"** again to confirm.

Stop sharing?



This will delete all links giving access to this item and remove all people with direct access except for owners.

Stop sharing

Cancel