

HOW TO SHARE FILES

There are several ways and locations you can share files from in Office 365:

1. **OneDrive**
2. **Teams**
3. **Apps**

Please note, “**Can view**” access is set by Default for everyone in WCA (anyone can view any file).

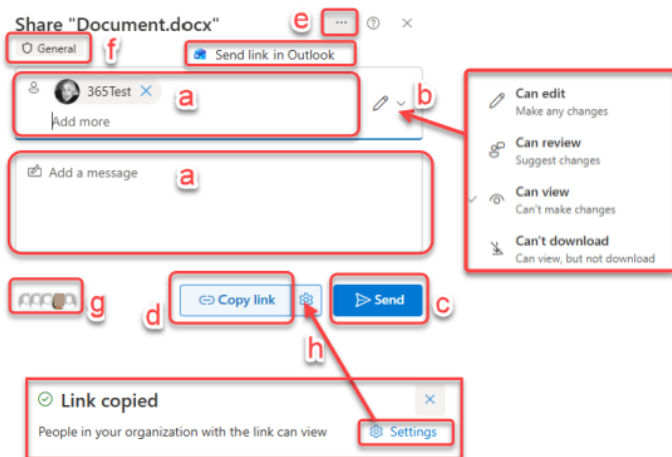
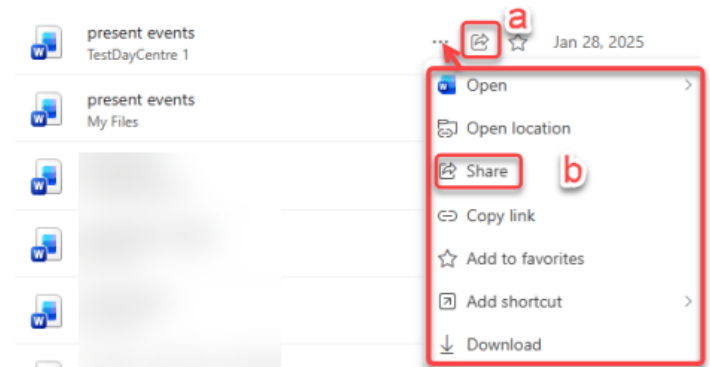
1. OneDrive

Anywhere where you can share a file you can either:

a) click on the share icon 

or

b) click on the 3 dots  then click on Share and then pick from one of the options



a) type in the name(s) of the person(s) you wish to share the file with, and additionally, you can also type a message

b) choose the access level (Edit or Review for collaboration)

c) click on "Send" (an email with the link will be sent) or

d) click on "Copy link"

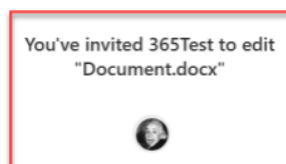
e) if you wanted to include more information and or files/attachments etc., click on the 3 dots (...) and click on "Send link in Outlook" (this will create a new email with a link, which you can continue to edit)

f) the Sensitivity label if the file is shown here

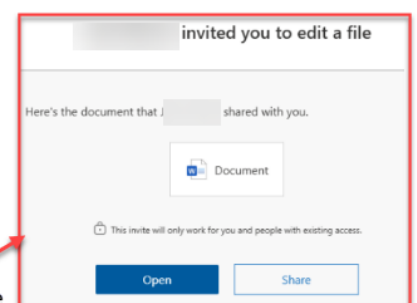
If you chose option D to "Copy link", you will see the above message

g) if this file has been shared before, you will see profile bubbles (otherwise it will show a lock symbol)

h) if you wish to view/change other settings (such as set an Expiration date) you can click on the "cog" symbol



If you chose option C to Send the link, you will see the above pop-up confirmation immediately, and the recipient will see the following message

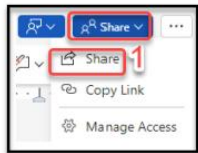


Note: Sensitivity labels cannot be set during sharing, only from within the document (for more information on that “How to” guide can be accessed on the training website - ["How to apply sensitivity labels"](#))

2. Teams

Exact same process (as above) applies to sharing a file in Teams

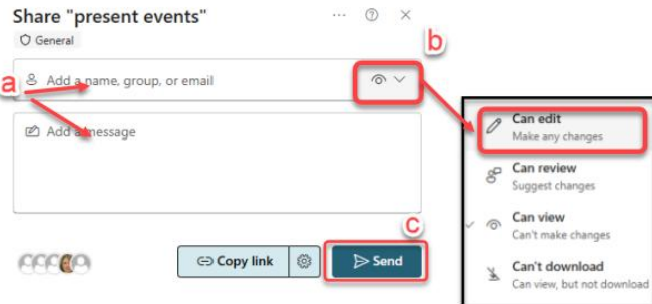
3. Apps (from the file itself (Word/Excel/PowerPoint))



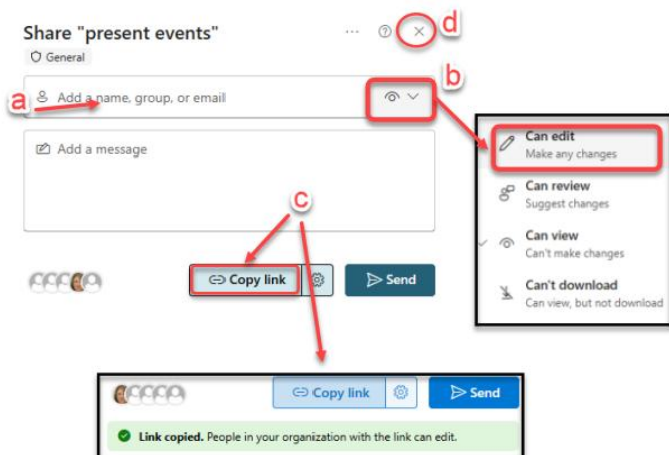
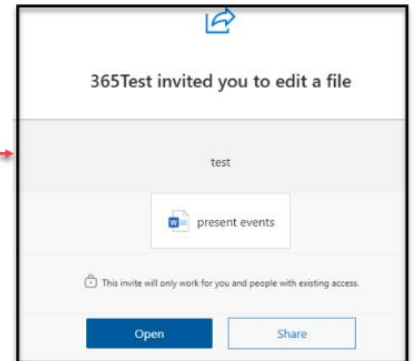
Click on "Share" in the upper right-hand corner and then click on Share.

1. In the Share window do one of the following:

- a) type names of people you want to share with, with an optional message below
- b) change access to "Can edit"
- c) click on "Send"



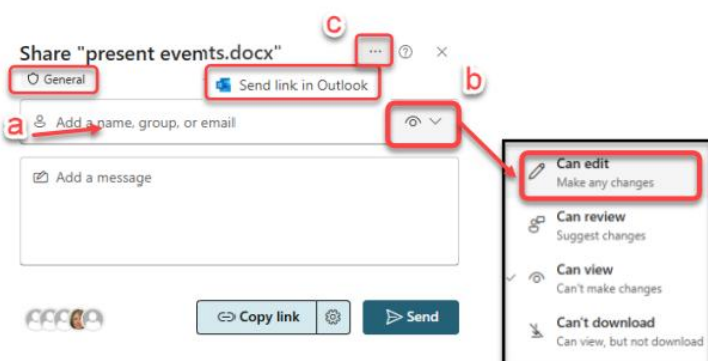
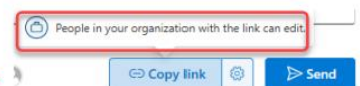
The recipient will see a message like this



If you do not wish to send a message, you can either copy a link, which you can then paste into a chat or anywhere else, or send a link in an outlook mail. The steps for sending a link are the same as above:

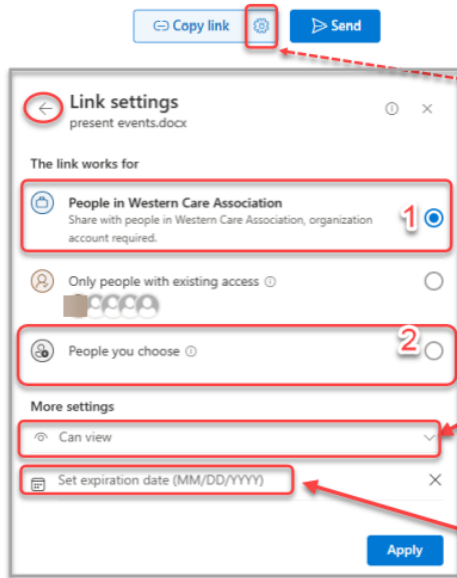
- a) type names of people you want to share with
- b) change access to "Can edit"
- c) here, instead of clicking "Send", click on "Copy link" and then paste it into an email/chat/etc. You will see a confirmation of the access level set, at the bottom.
- d) you can then close the dialog by clicking on the X

Before sending a link, you can check the level of access set if you hover over the "Copy link" button



Additionally, Office 365 can create an Outlook message for you with a link. The steps for sending a link are the same as above:

- a) type names of people you want to share with (this is optional)
- b) change access to "Can edit"
- c) here, instead of clicking "Send", click on the 3 dots (...) and click on "Send link in Outlook". A new Outlook email will open in a separate window with a link in the body of the email (and the recipient's address if you typed it in step a))



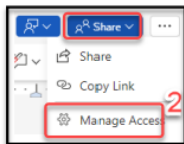
If you are sending a link, and you wish to set either an organisation access level (by default everyone in WCA can "View" any file), click on Link settings (cog icon next to "Copy link" button), it is advisable to limit access to just the people you're sharing this file with by choosing one of these options:

- 1) "People in Western Care Association"
- 2) "People you choose" - for this option you can type names/groups (if they are already present in your address book, or email addresses, this is done in step a))

You can also set the access level ("Can edit") as shown in above screenshots or by clicking on the drop-down arrow here.

Additionally, you can also set an Expiration date below access level

Click on "Apply" when finished and then on back arrow next to "Link settings", you will see the initial Share dialog, where you can proceed to either Send or "Copy Link".



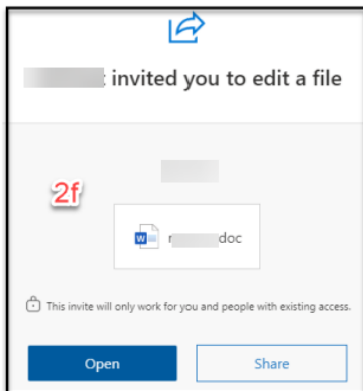
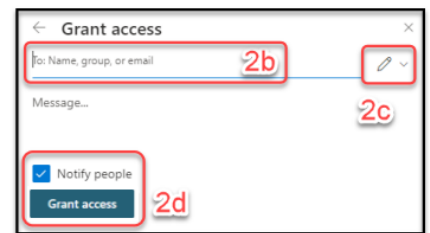
2. Additionally, you can also grant access (as well as check if anyone already has it, and or remove access), by either going to Share > Manage Access inside a file, or by clicking on the profile bubbles in the Share dialog. In "Manage access" dialog you can set access for:

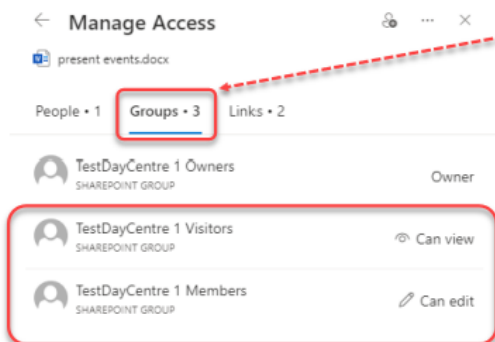
- a) People
- b) Groups
- c) Links



2a) To add more people click on the person icon here. In People tab you can change the access level for those you have already selected in the address field or those that already have access to this file.

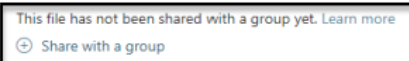
When using option 2a you will then see the following window -2b, where you can add peoples' names and/or email addresses. Then you will need to set the appropriate access level - 2c, and either check the option "Notify people" (if you do, you can additionally add a message below the address field) or just click on "Grant access". If you checked the Notify option the confirmation pop-up will say (2e) "Access granted and notified" otherwise just "Access granted". When you close the pop-up you will have to repeat the steps if you want to add more people. The added person will receive this message if you chose the Notify option (2f)



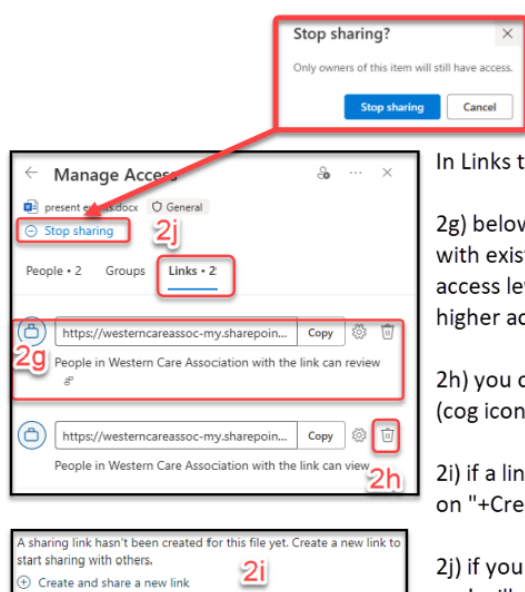


If the file is being shared from Teams, the channel it's being shared from will automatically be added with 3 default access levels under Groups tab: View access for Visitors and Edit access for Members, and the Owner of this file is (the channel it is located in).

If the file is not in Teams /or it is being shared by a person from their 365 online and has not been shared with a group before, below in Groups tab you will see the following:



If you would like to share the file with a group, you can add a group by clicking on "+Share with a group" and typing its name in the address field (option a)



In Links tab you can see if a link to the file has been shared before (the tab will show the count)

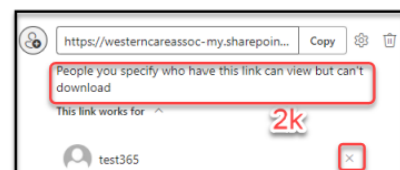
2g) below the link instance you can tell what access has been set and for what category (WCA, People with existing access or People you choose). If the link has been shared with the same Cohort but the access level is different (eg. one link was given an Edit access, and the other View access, then the higher access will apply)

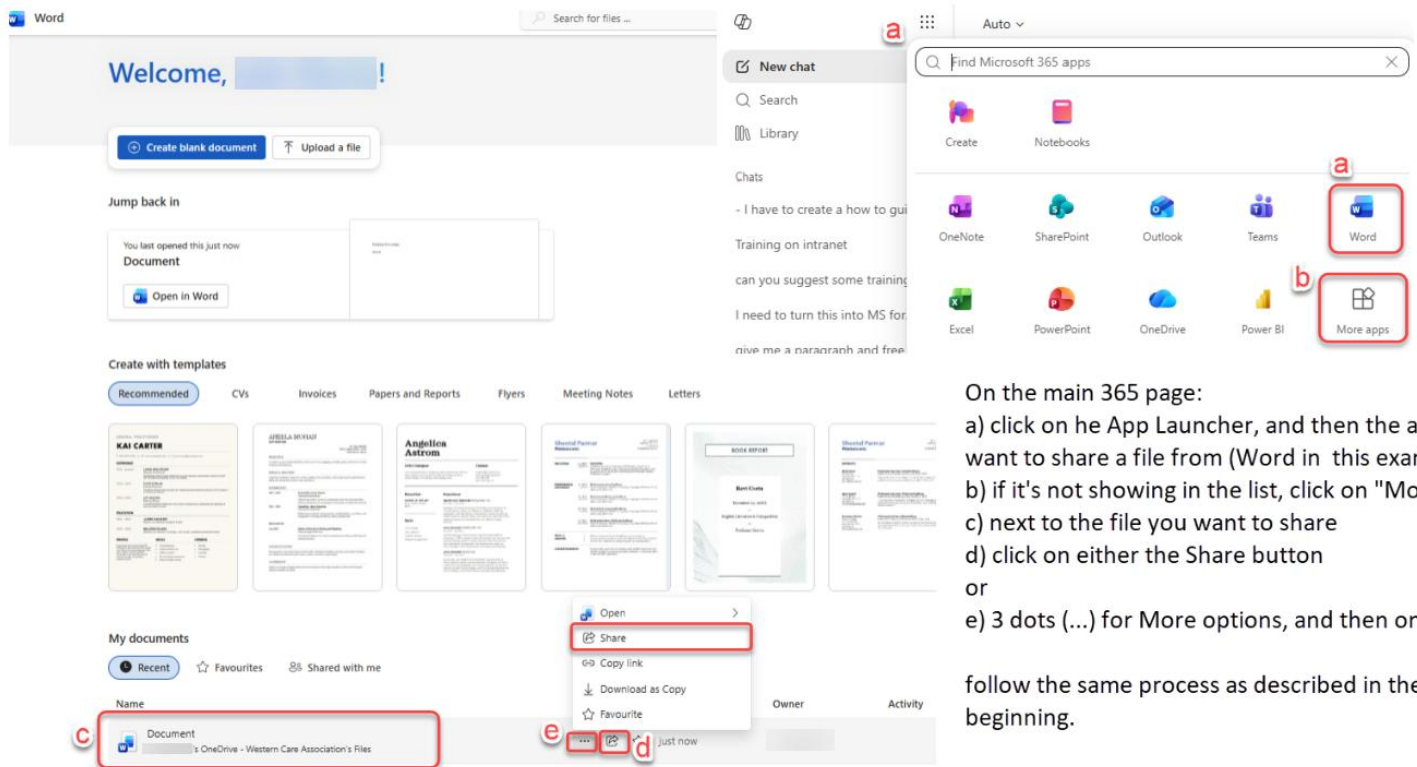
2h) you can delete the link instance by clicking on the bin icon (you can also do this from the settings (cog icon next to the bin icon)

2i) if a link to the file has not yet been shared with anyone you will see this message, here by clicking on "+Create and share a new link" you can set sharing options

2j) if you want to remove all access to the file/stop sharing, you can click on the "Stop sharing" link and will see a prompt informing you that only owners will have access when you confirm you wish to stop sharing by pressing the "Stop sharing" button

2k) if a link was shared with a category "People you choose" then you will also have an option in settings (cog icon) to remove individual(s) from accessing the link by clicking on the X next to their name

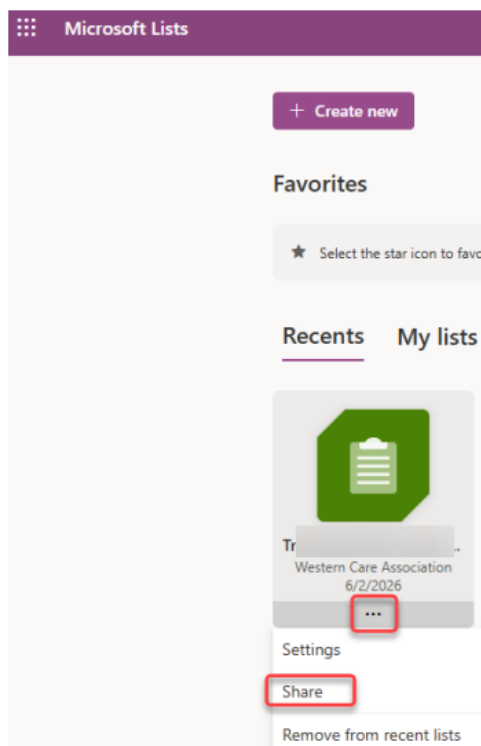




On the main 365 page:

- a) click on the App Launcher, and then the app you want to share a file from (Word in this example)
- b) if it's not showing in the list, click on "More apps"
- c) next to the file you want to share
- d) click on either the Share button or
- e) 3 dots (...) for More options, and then on Share

follow the same process as described in the beginning.



In other apps (Lists in this example), below the file you wish to share

- a) click on the 3 dots (...)
- b) click on Share

follow the same process as described in the beginning.

Microsoft References:

Share files and folders in Microsoft OneDrive - <https://support.microsoft.com/en-US/onedrive/share-files-and-folders-in-microsoft-onedrive>

Sharing files, folders, and list items - <https://support.microsoft.com/en-US/sharepoint/sync/sharing-files-folders-and-list-items>