

Sharing in SharePoint: Sites, Document Libraries, Folders, and Files

Sharing Sites

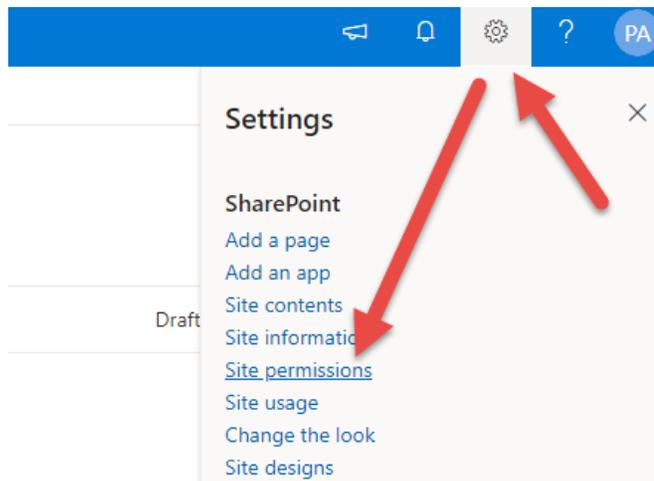
Almost every site in SharePoint is accessible in a read-only view to all PEPFAR SharePoint account holders. Occasionally, entire sites are created for limited audiences, this is rare because private folders and private document libraries usually suffice.

To Add and Remove Users from a Site

First decide if the user you're adding should be a Visitor, Member, or a Poweruser.

- **Visitors** only have read-access to the site.
- **Members** can edit documents in document libraries, change the approval status of documents, contribute new documents, and delete existing documents from document libraries.
- **Powerusers** can control other's permissions to the site at the Site, Document Library, Folder, and File level. They can also change the site layout by editing site pages.

Now, go to the SharePoint Online site in question, wait for the Gear Icon to load in the upper right hand corner, it usually takes ~5 seconds after the page loads. Click on the Gear, then Site permissions.



A fly-in Permissions window displays. Click Advanced permission settings.

Advanced permissions settings.' A large red arrow points from the 'Site owners' section down to the 'Advanced permissions settings' link."/>

Permissions

Manage site permissions or invite others to collaborate

Invite people

- Site owners
- Site members
- Site visitors

Site Sharing

[Change how members can share](#)

There are additional groups or people with permissions on this site. To see them, please visit [Advanced permissions settings](#).

The Permissions Page appears. Click on the Permissions Group of the group you want to add your user to, either "SITE_NAME Visitors", "SITE_NAME Members", or "SITE_NAME Powerusers". Do not edit the membership of other groups.

SharePoint

BROWSE PERMISSIONS

Grant Permissions Create Group Edit User Permissions Remove User Permissions Check Permissions

Permission Levels Access Request Settings Site Collection Administrators

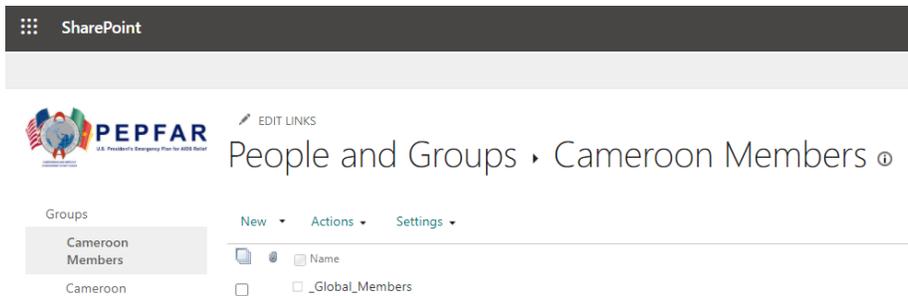
Grant Modify Check Manage

Coordinator's Home
General Documents
HQ Collaboration
Tasks
Archive Data
Recent
Images
Subprograms
Programs
Bamboo Navigators
Calendar
Recycle Bin
EDIT LINKS

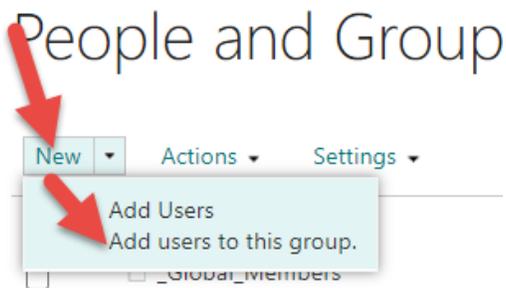
⚠ There are limited access users on this site. Us

Name
 _OU_Global Members
 _Security_OU_HQ-Collab
 _Security_OU_ISME
 _Security_OU_PET
 Cameroon Members
 Cameroon Powerusers
 Cameroon Visitors

To Add a user to the selected group, click on the Name of the group. In this example, we're using Cameroon Members:



To Add a user to this group, click New, then Add Users.



Click "SHOW OPTIONS" in the resulting dialog:

Share 'Cameroon'



Invite people
Shared with

Enter names or email addresses.

Include a personal message with this invitation (Optional).

[SHOW OPTIONS](#)

Decide if you want the system to generate an invitation email. Typically, you will leave this unchecked and email the user personally to let them know if needed. Enter the Names or Email Addresses above for the user(s) you wish to invite. If their name does not autocomplete, it's because that user does not have an account. If you believe they do, try entering another email address for the user, and if that fails, submit a ticket. When complete, click Share.

Share 'Cameroon'



Invite people
Shared with

pep|

PEPFAR Admin (Optional).

Showing 1 result

[HIDE OPTIONS](#)

Send an email invitation

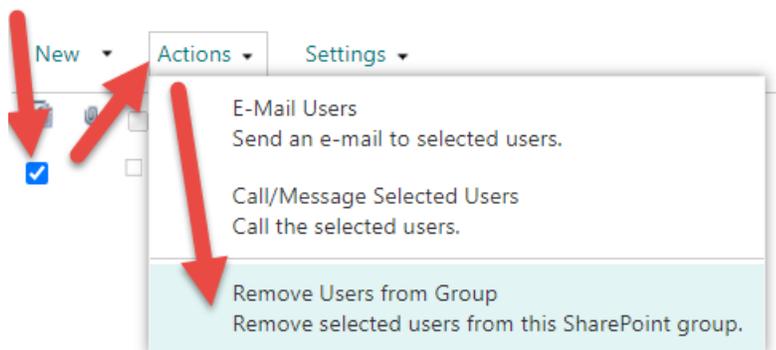
Confirm that you see the users' names in the list.

People and Groups ▶ Camerc

New ▾ Actions ▾ Settings ▾

<input type="checkbox"/>	<input type="checkbox"/>	Name
<input type="checkbox"/>	<input type="checkbox"/>	_Global_Members
<input type="checkbox"/>	<input type="checkbox"/>	[Redacted]
<input type="checkbox"/>	<input type="checkbox"/>	PEPFAR Admin

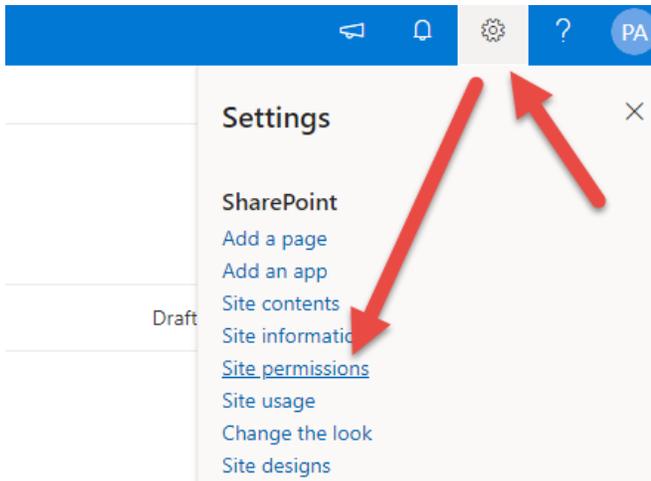
To remove a user select the checkbox to the far left of their name (not the little box right next to it) then Select Actions, Remove User.



Confirm that you no longer see the users' names in the list.

To make a Site Private

Go to the SharePoint Online site in question, wait for the Gear Icon to load in the upper right hand corner, it usually takes ~5 seconds after the page loads. Click on the Gear, then Site permissions.



A fly-in Permissions window displays. Click Advanced permission settings.

Permissions

Manage site permissions or invite others to collaborate

[Invite people](#)

∨ [Site owners](#)

∨ [Site members](#)

∨ [Site visitors](#)

Site Sharing

[Change how members can share](#)

There are additional groups or people with permissions on this site. To see them, please visit [Advanced permissions settings](#).

Click "SITE_NAME Visitors"

SharePoint

BROWSE **PERMISSIONS**

Grant Permissions
 Create Group
 Edit User Permissions
 Remove User Permissions
 Check Permissions
 Permission Levels
 Access Request Settings
 Site Collection Administrators

Grant Modify Check Manage

Coordinator's Home **⚠ There are limited access users on this site. Us**

General Documents

HQ Collaboration Name

Tasks _OU_Global Members

Archive Data _Security_OU_HQ-Collab

Recent _Security_OU_ISME

 Images _Security_OU_PET

 Subprograms Cameroon Members

 Programs Cameroon Powerusers

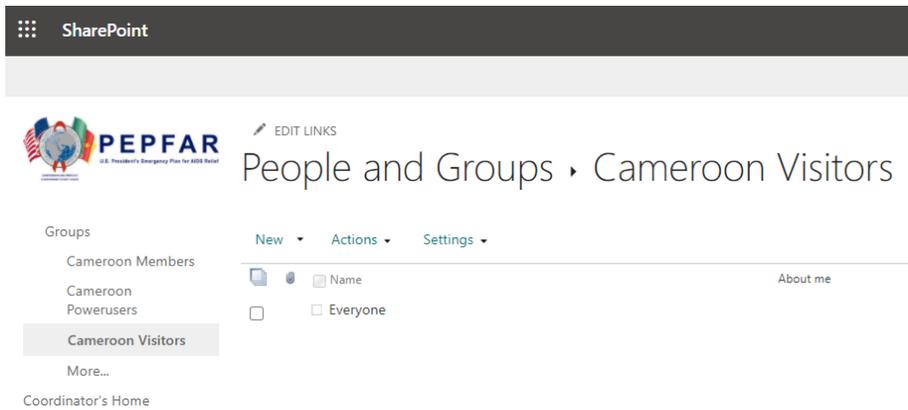
 Bamboo Navigators Cameroon Visitors

 Calendar

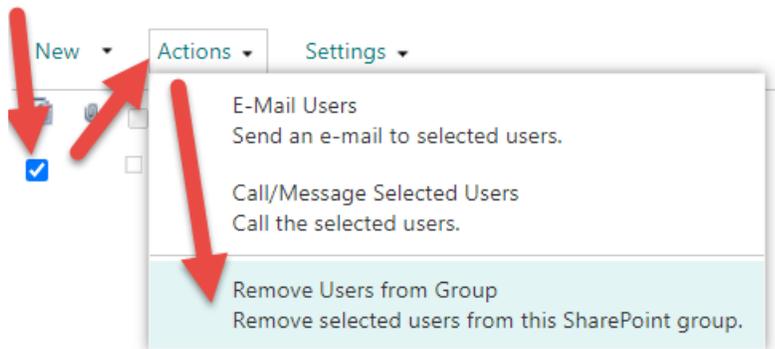
Recycle Bin

EDIT LINKS

You can see "Everyone" is a member of "SITE_NAME Visitors". This means all PEPFAR SharePoint Account Holders have read-only access to view this site.



To remove “Everyone” Select the checkbox to the far left of “Everyone” (not the little box right next to “Everyone”) then Select Actions, Remove User.



Now Only “SITE_NAME Members” and “SITE_NAME Powerusers” have access to the site. To Add and Remove users to these groups see the article on Adding and Removing Users from Sites.

Sharing Document Libraries

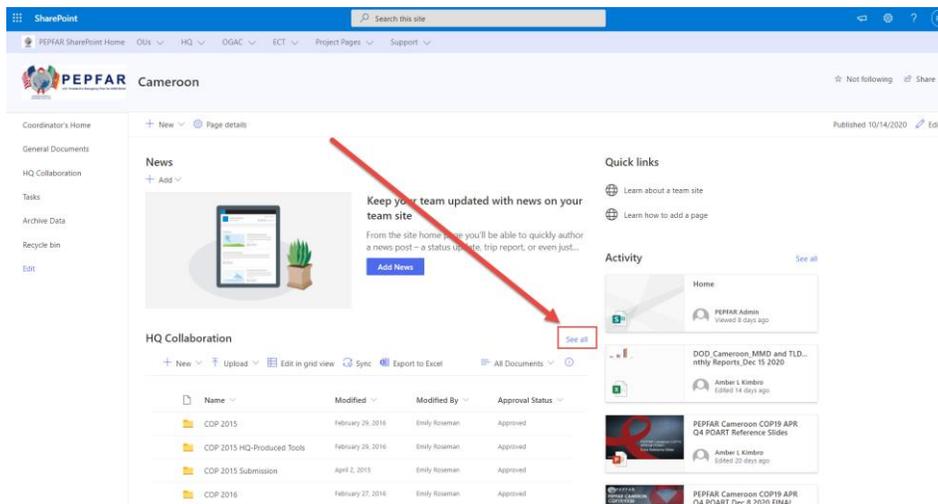
To Add and Remove Users from a Document Library

First decide if the user you’re adding should be a Visitor, Member, or a Poweruser.

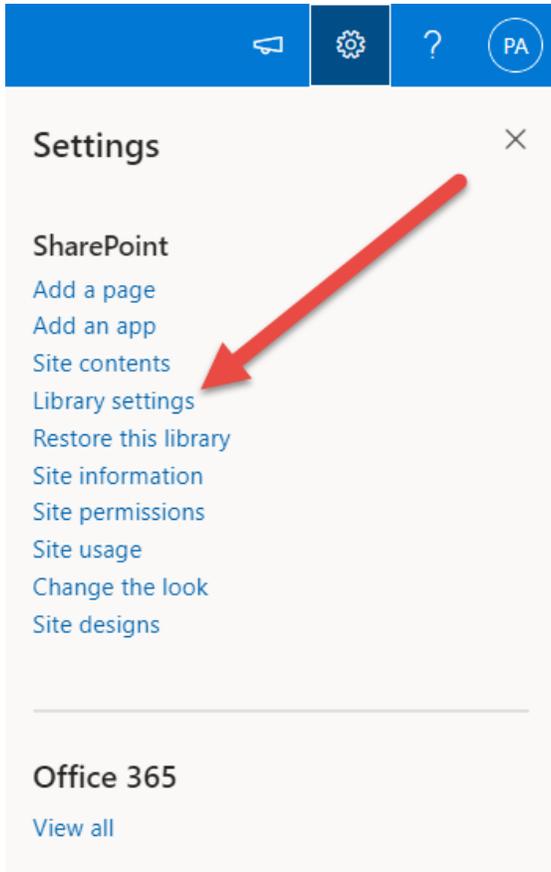
- **Visitors** only have read-access to the site.

- **Members** can edit documents in document libraries, change the approval status of documents, contribute new documents, and delete existing documents from document libraries.
- **Powerusers** can control other’s permissions to the site at the Site, Document Library, Folder, and File level. They can also change the site layout by editing site pages.

Now, go to the Document Library in question. If it’s embedded in another page, you’ll see “See all” in the upper right hand corner, click this to go to the actual document library. Below you can see the HQ Collaboration document library is embedded.



Wait for the Gear Icon to load in the upper right hand corner, it usually takes ~5 seconds after the page loads. Click on the Gear, then Library Settings



The settings page appears. Click "Permissions for this Document Library".

EDIT LINKS

HQ Collaboration ▸ Settings

List Information

Name: HQ Collaboration
Web Address: [https://pepfar.sharepoint.com/sites/Cameroon/HQ Collaboration/Forms/AllItems.aspx](https://pepfar.sharepoint.com/sites/Cameroon/HQ%20Collaboration/Forms/AllItems.aspx)
Description:

General Settings

- **List name, description and navigation**
- Versioning settings
- Advanced settings
- Validation settings
- Column default value settings
- Audience targeting settings
- Rating settings
- Form settings

Permissions and Management

- Delete this document library
- Save document library as template
- **Permissions for this document library**
- Manage files which have no checked in version
- Workflow Settings
- Enterprise Metadata and Keywords Settings



Has this document library already been customized?

Check to see if this document library already has custom permissions.

If you see “Stop Inheriting Permissions” on the menu and “This library inherits permissions from its parent” as below, then you know your library has NOT been customized, and the Document Library has the same permissions that the SITE does: Site Visitors have read access to the documents, Site Members can edit, delete, contribute documents and change their draft/pending/approval statuses, and Powerusers have full control and can alter other’s permissions. **Best practice at this juncture is to NOT customize a non-customized document library, but instead to change this user’s permission at the site level.** If a customized document library is needed, create a ticket to request a new document library.

BROWSE PERMISSIONS

Manage Parent Stop Inheriting Permissions Check Permissions

Inheritance Check

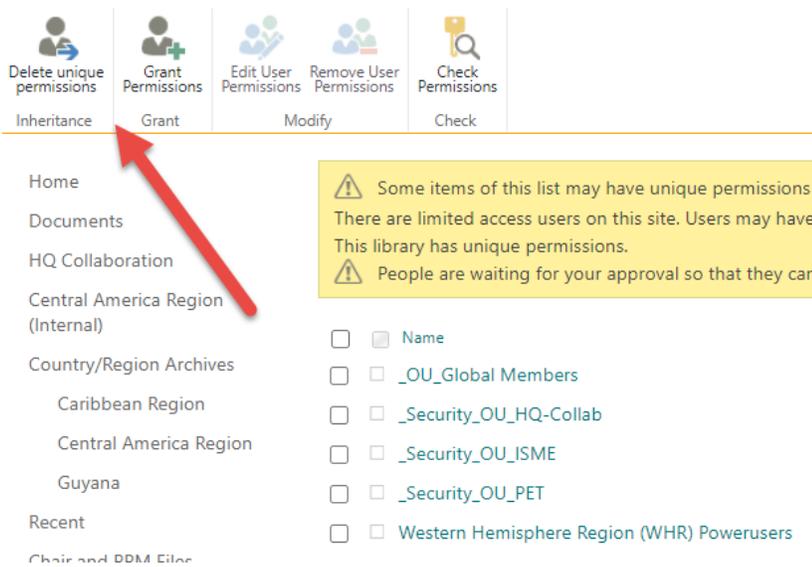
Coordinator's Home
General Documents
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EDIT LINKS

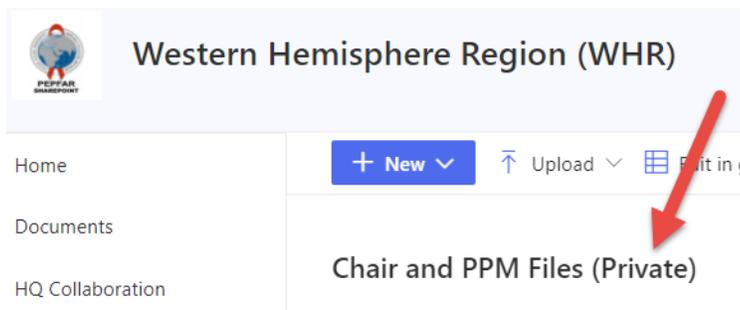
There are limited access users on this site. Users may have limited access to some content.
This library inherits permissions from its parent (Cameroon)

- Name
- _OU_Global Members
- _Security_OU_HQ-Collab
- _Security_OU_ISME
- _Security_OU_PET
- Cameroon Members
- Cameroon Powerusers
- Cameroon Visitors

If the document library already has custom permissions, you'll see "Delete unique permissions" on the menu.



If your document library has custom permissions, it can be suffixed with a “(Private)” or “(Internal)” in the name to let other users know they shouldn’t expect to have access to it:



In this case, you can add and remove users to/from the appropriate group depending on the level of access needed, or grant individual users specific permissions using “Grant Permissions”. First we’ll cover Granting Permissions, then we’ll discuss removing users from document libraries.

[Add and Remove user to/from groups](#)

Click on the Permissions Group of the group you want to add your user to, either “SITE_NAME Visitors”, “SITE_NAME Members”, or “SITE_NAME Powerusers”. Do not edit the membership of other groups.

SharePoint

BROWSE PERMISSIONS

Grant Permissions Create Group Edit User Permissions Remove User Permissions Check Permissions

Permission Levels Access Request Settings Site Collection Administrators

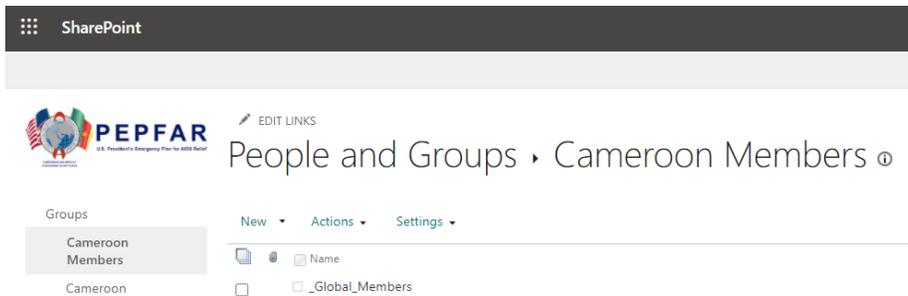
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EDIT LINKS

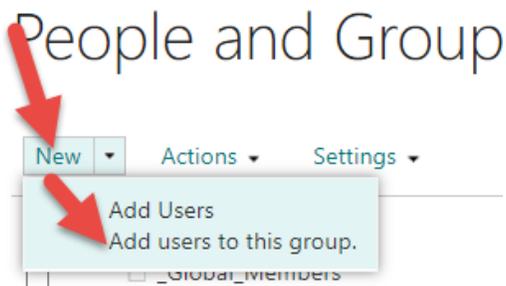
⚠ There are limited access users on this site. Us

<input type="checkbox"/>	<input type="checkbox"/>	Name
<input type="checkbox"/>	<input type="checkbox"/>	_OU_Global Members
<input type="checkbox"/>	<input type="checkbox"/>	_Security_OU_HQ-Collab
<input type="checkbox"/>	<input type="checkbox"/>	_Security_OU_ISME
<input type="checkbox"/>	<input type="checkbox"/>	_Security_OU_PET
<input type="checkbox"/>	<input type="checkbox"/>	Cameroon Members
<input type="checkbox"/>	<input type="checkbox"/>	Cameroon Powerusers
<input type="checkbox"/>	<input type="checkbox"/>	Cameroon Visitors

To Add a user to the selected group, click on the Name of the group. In this example, we're using Cameroon Members:



To Add a user to this group, click New, then Add Users.



Click "SHOW OPTIONS" in the resulting dialog:

Share 'Cameroon'



Invite people
Shared with

Enter names or email addresses.

Include a personal message with this invitation (Optional).

[SHOW OPTIONS](#)

Decide if you want the system to generate an invitation email. Typically, you will leave this unchecked and email the user personally to let them know if needed. Enter the Names or Email Addresses above for the user(s) you wish to invite. If their name does not autocomplete, it's because that user does not have an account. If you believe they do, try entering another email address for the user, and if that fails, submit a ticket. When complete, click Share.

Share 'Cameroon'



Invite people
Shared with

pep|

PEPFAR Admin (Optional).

Showing 1 result

[HIDE OPTIONS](#)

Send an email invitation

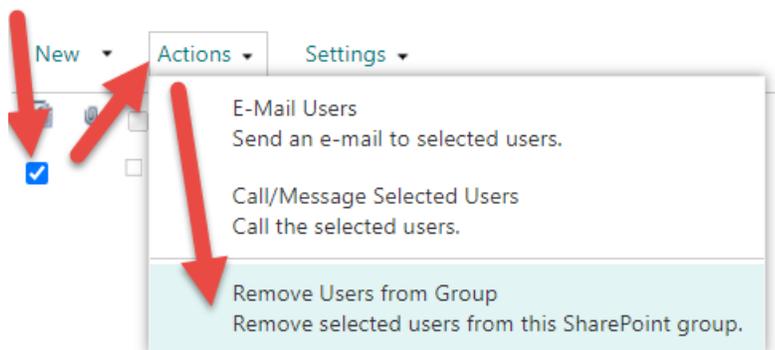
Confirm that you see the users' names in the list.

People and Groups ▶ Camerc

New ▾ Actions ▾ Settings ▾

<input type="checkbox"/>	<input type="checkbox"/>	Name
<input type="checkbox"/>	<input type="checkbox"/>	_Global_Members
<input type="checkbox"/>	<input type="checkbox"/>	[Redacted]
<input type="checkbox"/>	<input type="checkbox"/>	PEPFAR Admin

To remove a user select the checkbox to the far left of their name (not the little box right next to it) then Select Actions, Remove User.



Confirm that you no longer see the users' names in the list.

Grant Permissions

If, and only if, there is no existing appropriately permissioned user group for this user (in which case you would just add them to that user group), then click "Grant Permissions" to permission them individually.

Delete unique permissions Grant Permissions Edit User Permissions Remove User Permissions Check Permissions

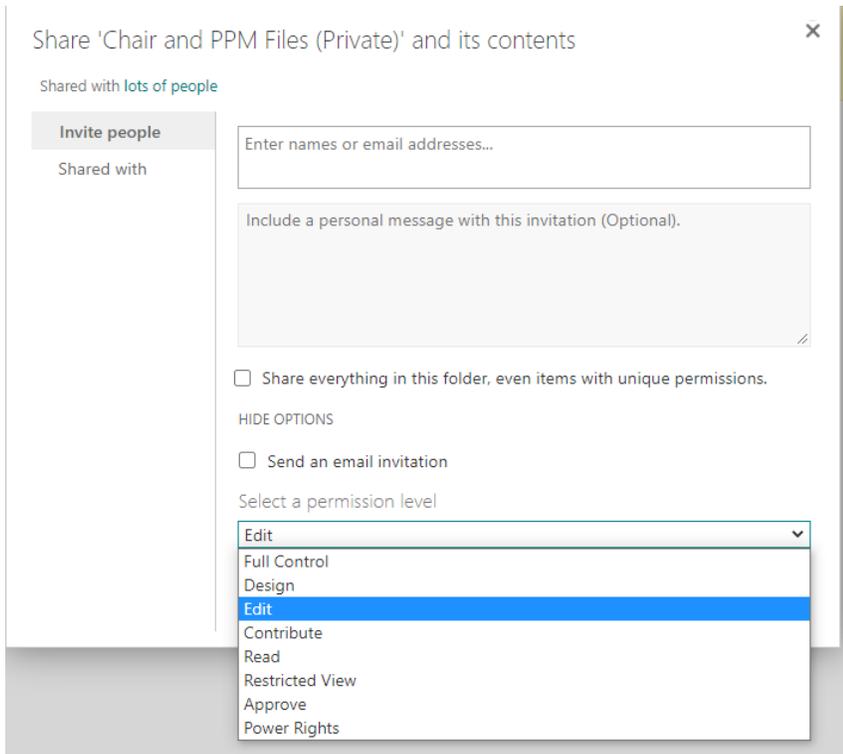
Inheritance Grant Modify Check

Home Documents HQ Collaboration Central America Region (Internal) Country/Region Archives Caribbean Region Central America Region Guyana Recent Chair and PDM Files

Warning: Some items of this list may have unique permissions. There are limited access users on this site. Users may have. This library has unique permissions. People are waiting for your approval so that they can.

- Name
- _OU_Global Members
- _Security_OU_HQ-Collab
- _Security_OU_ISME
- _Security_OU_PET
- Western Hemisphere Region (WHR) Powerusers

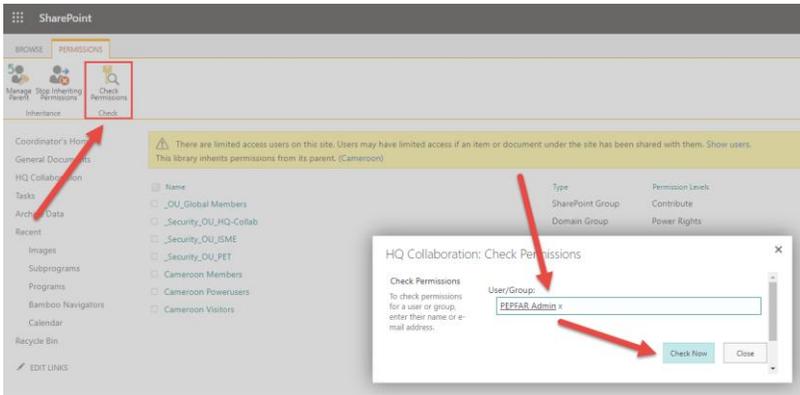
Click "SHOW OPTIONS" then select the appropriate options in the resulting dialog, and click Share. You'll likely want to De-Select "Share everything in the folder, even items with Unique Permissions", and "Send an email invitation".



Removing users from a Document Library Completely

Removing a user from a document library can take multiple steps because they may have been given access to the library through multiple groups.

First, check permissions for the user in question. Click "Check Permissions" then enter the name of the user, then "Check now"



The results are displayed below: Here you can see PEPFAR Admin is a member of the Powerusers, Members, and Visitors groups, so that user would need to be removed from all three of those groups to deny them access to this document library.

HQ Collaboration: Check Permissions ✕

Check Permissions
To check permissions for a user or group, enter their name or e-mail address.

User/Group:

Permission levels given to PEPFAR Admin (i:0#.fjmembership|pepfar@pepfar.onmicrosoft.com)

Limited Access, Power Rights	Given through the "Cameroon Powerusers" group.
Contribute, Limited Access, Approve	Given through the "Cameroon Members" group.
Read	Given through the "Cameroon Visitors" group.

Remove the user from all necessary groups as described in "Add and Remove User to/from Groups"

Sharing Files and Folders (for Powerusers)

To share files and folders in SharePoint online, first determine your audience. You may want to keep the default permissions granted to users of the site, or you may want to limit access to a folder or file specifying that certain users can edit a document, while others can only view it. Secondly, determine how you want to share the file or folder – you can direct users to the document library containing it, or you can create and send out a special link. These “Special Links” can come with access rights of their own that ignore the underlying access rights on the file or folder in the document library that contains it.

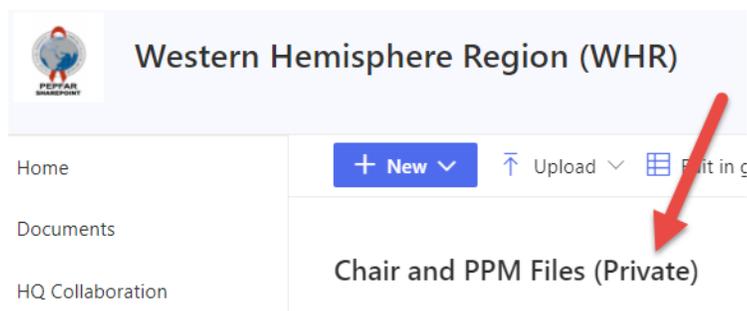
To share an existing folder using its underlying permissions

To share an existing folder without changing its permissions for the users accessing it, you can click the three dots next to the file or folder, and use the “Copy Link” menu option, selecting “People with existing access can use the link”.

To create a file or folder with custom permissions, or alter the permissions on an existing folder:

If you’re creating a file or folder that you want site members and power users to be able to edit, and for site visitors to only be able to view, you can create this folder or add this file to the site’s Shared Documents document library. By convention, the Shared Documents library does not contain customized private or internal files or folders.

If you don’t want visitors to be able to read this file or folder, or for the site’s powerusers and members to be able to edit it, place it in customized Document Library. These document libraries will be named with a (Private) or (Internal) suffix like the below:

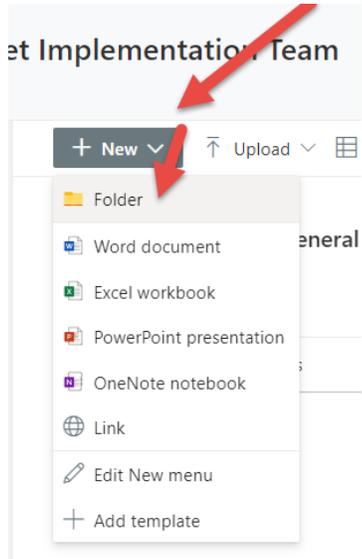


If there is no such customized document library on your site, submit a ticket and one will be created for you.

Inside your customized document library, Inheritance will already be broken. You can verify this by following the steps in “Has this document library already been customized?” above. [In short: If you see “Stop Inheriting Permissions” on the permissions menu your library has NOT been customized, if the document library already has custom permissions, you’ll see “Delete unique permissions” on the menu.]

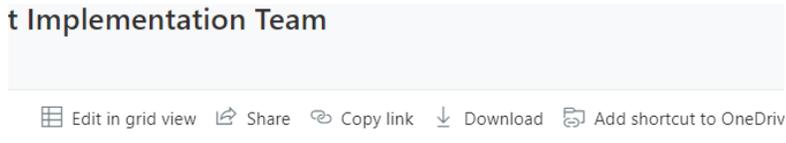
Navigate to the parent folder where you want to create your private folder. Click “New”, “Folder”.

Commented [GB1]: Jose says Only site owners (power users) are configured to be able to send shareable links that contain special permissions. But to simplify permissions management, we should guide the power users to avoid using the shareable links model and to apply direct permissions to the item's parent library or site instead (following the visitor/member/owner model).



Manage Access

Now enter your folder name and append (Private), or upload your file. Now click the three dots next to your file/folder name, and click "Manage Access"

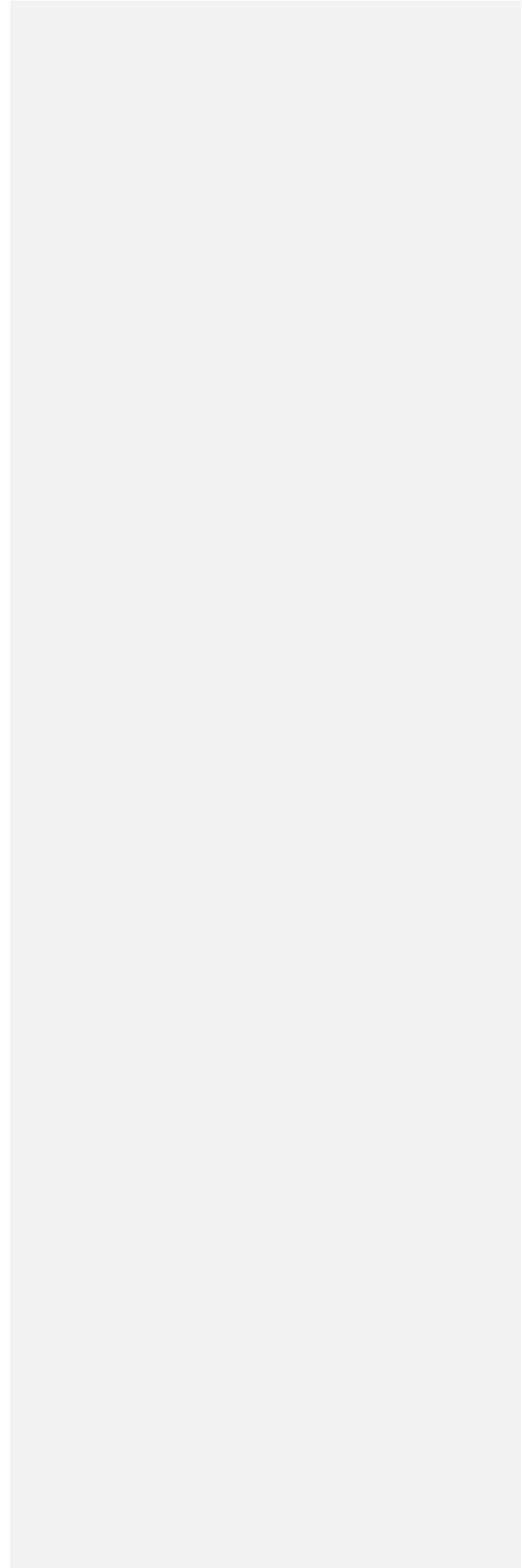


Shared Documents (Internal)

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Name	Modified	M
<input checked="" type="checkbox"/>	<input type="checkbox"/>	IT Budget Allocations (Private)		

Share
Copy link
Manage access
Download
Add shortcut to OneDrive

Then click Advanced



IT Budget Allocations (Private) X

Manage Access

Links giving access ⓘ Share

There are no sharing links for this item.

Direct access ⓘ +

-  _GlobalOwners Owner
-  PEPFAR Admin Owner
-  PEPFAR.net Implementation T... Owner
-  PEPFAR.net Implementation T... Owner
-  PEPFAR.net Implementation... ✕ ∨
-  PEPFAR.net Implementation... ✎ ∨

[Advanced](#)

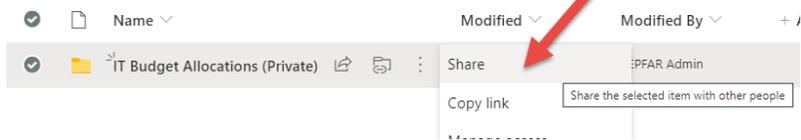
From here, you can control user's access to this file/folder in an identical way to Document Libraries, see above to

- Add and Remove user to/from groups
- Grant Permissions
- Remove Users Completely

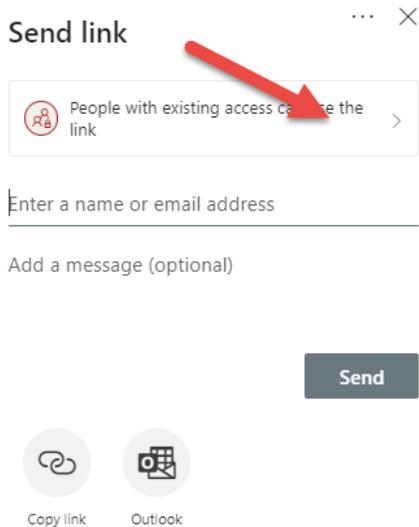
Special Links to Files created via "Share" or "Copy Link"

You can create special links to files and folders using "Share". Click on the three dots, then "Share".

Shared Documents (Internal)



The Send Link dialog appears. Click in the top square to see your options.



You can select any of the following three options:

Link settings ×

Who would you like this link to work for?
[Learn more](#)

- Anyone with the link ⓘ
- People in PEPFAR with the link
- People with existing access ✓
- Specific people

- **People in PEPFAR with the link** - This link can be used by anyone with a PEPFAR SharePoint account, and can be tied to unique permissions.
- **People with existing access** provides a link that can be used by people who already have access to the file, folder, or list item. It does not change the permissions on the item. Use this if you're just drawing people's attention to a specific item.
- **Specific people** creates a link that only the people that you specify can use to access the file or folder. If you select this option, enter the names or email addresses of the people to whom you want to give access to. Can be tied to unique permissions.

Only "People in PEPFAR with the link" and "Specific people" allow you to tie unique permissions to the link, see the additional options below, when one of these sharing options is selected:

Link settings



Who would you like this link to work for?

[Learn more](#)

 Anyone with the link ⓘ

 People in PEPFAR with the link

 People with existing access

 Specific people ✓

Other settings

Allow editing

 Open in review mode only ⓘ

Block download

Apply

Cancel

Files opened by shared links are read-only by default, unless you select “People with Existing Access” (in which case the permissions on the file set in the document library apply to the link as well). If you select “People in PEPFAR with the link” or “Specific people” then you can further say anyone granted access to the file via this link can also Edit (or Edit in Review Mode Only), or you can configure the link to prevent the file from being downloaded.

Reviewing Special Links:

To view access granted by special links and delete special links, click the three dots next to the file or folder and select Manage Access. On the right hand side, you’ll see “Links giving access” – the links, the access they give and to whom.

Manage Access

[Stop sharing](#)

Links giving access ⓘ [Share](#)

 [Copy](#) ...

People you specify can edit

This link works for ^

 Grant Barker ×

Direct access ⓘ [+](#)

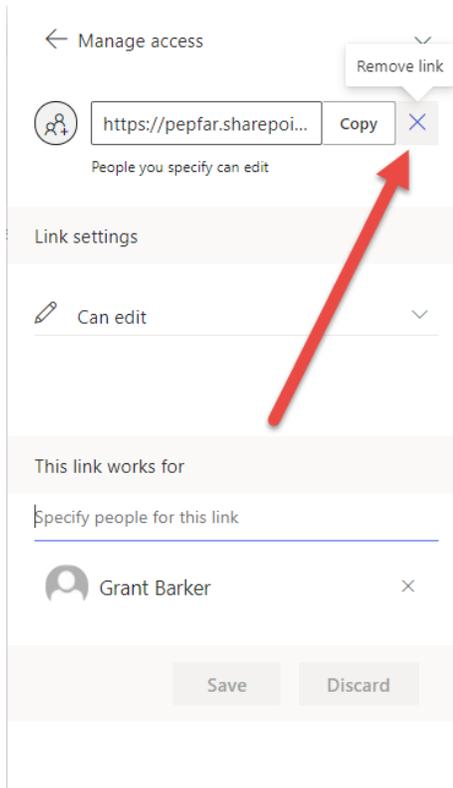
 _GlobalOwners Owner

 PEPFAR Admin Owner

 Tony Scheer
Admin Only Owner

To Delete a Special Link

From the Manage Access view of the special link, click the three dots to the right of the link, then click the "X" to remove the link.



PLEASE NOTE the following GOTCHA!

Permissions set on links only apply to the files as they are accessed from the link. Example:

Suppose A is a poweruser over Botswana. User B creates a file in "Shared Documents (Internal)" in the Botswana site, knowing regular visitors to the site can't view these internal documents. B wants to make sure no one can edit the file, so B creates a link that doesn't allow editing and sends it out to the Botswana team. A accesses the document and wants to make a change, but can't because the link was set to make all users accessing the document using the link read-only. But A knows the document is stored in Botswana's "Shared Documents (Internal)" library and digs for minute and finds it. Because A is a poweruser A can open the file for editing directly from the document library. B is confused and frustrated because B didn't anticipate someone going in to edit the file from the document library. B should have made the file in the document library private only to B and the Global Powerusers, then B's links would be the *only* way anyone else could get at the files.