How to manage Sharepoint folder permissions

Sharepoint Online makes it easy to share individual folders, or create Sharepoint groups to share out your site. This guide will show you how to create folders inside a sharepoint document library, and share out folders in that library with multiple people at Harvard’s Sharepoint Online tenant. As always, if you have a question, email help@seas.harvard.edu

Step-by-step guide

1. log into your site
2. browse to your document library
3. here we are creating two folders inside the document library, shown below as ‘folder 1’ and ‘folder 2’. We do this by clicking ‘new’, and clicking ‘folder’, and naming our folder.

Now that we have our new folder(s), we can populate our folders with all the files/folders we wish with content, such as pdf’s, word documents, etc.

Now we want to share out ‘folder 1’.

There are 3 permission groups usually assigned to the site, Site Owners (full access), Site Members (edit access), and site visitors (read access).

To view the permissions, click on the three dots to the right of any folder, and click ‘details’. On the right side, click on ‘manage access’. Here you will see all permissions on that folder:

4. Now that we have our new folder(s), we can populate our folders with all the files/folders we wish with content, such as pdf’s, word documents, etc.
5. Now we want to share out ‘folder 1’. This folder already has permissions on it, which are the permissions of the site.
   a. There are 3 permission groups usually assigned to the site, Site Owners (full access), Site Members (edit access), and site visitors (read access).
   b. To view the permissions, click on the three dots to the right of any folder, and click ‘details’. On the right side, click on ‘manage access’. Here you will see all permissions on that folder:
6. Now that we know all permissions on the folder, we want to share the folder to certain people. To do so:
   a. click on the three dots to the right of the folder
   b. click share

   c. After clicking 'Share', a window pops up. Here there are several options. The default option is to share to certain people.

   d. Enter the names/email addresses of the people you wish to share to. The easiest way it to type LAST NAME, FIRST NAME. Their name will pop up and you can click it.

   e. Here I will share it out to myself. Notice as I type my LAST NAME, FIRST NAME, my account pops up, and I click it to add it. I can then add more users
f. As you type people's names, you click on them, and they are added to the list. Here I am adding three people to this folder:

[Image of a Send Link window showing three names: Deane, Jonathan, Loide, Rebecca, Rogers, Christopher]

- Deane, Jonathan
- Loide, Rebecca
- Rogers, Christopher

Send

g. When you click 'Send', your folder will be shared, and an email will be sent to the users you share your folder out, with a link directly to the folder.

i. You can also send a personal message to any of the people you wish to share to. Here is the email that the user will receive, with an optional message, and they will click the 'open' button, which will bring them directly to the folder:

[Image of an email showing a personal message]

Deane, Jonathan shared the folder "folder 1" with you.

[Image of the Send Link window and the folder]

Here are the documents we spoke about in the meeting...

This link only works for the direct recipients of this message.

folder 1
Last modified 10/30/2017 4:44:04 PM

Open

ii. This means you do not need to add users to any groups, if you simply need to share out a certain folder, simply share the folder this way, and those users will only have access to this certain folder and nothing else (if they have no other site permissions).

iii. This is a great way to quickly share out folders to certain people who may not need regular site permissions, but only access to a certain folder.
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