RI-VIS Sharing in SharePoint

Instructions

1. Log in to the Microsoft account you have been granted access to the RI-VIS SharePoint through (see SOP Connecting to SharePoint if you are experiencing issues)
2. Navigate to the file or folder in the SharePoint directory which you wish to share. The RI-VIS SharePoint home can be found at https://instructeric.sharepoint.com/sites/ri-vis

Sharing documents/folders internally within RI-VIS consortium

If you wish to share documents within the RI-VIS consortium (with other users who have been granted access to the whole SharePoint site)

1. Open the document or folder in SharePoint online.
2. Copy the URL for the page you are on when viewing the current document or folder.
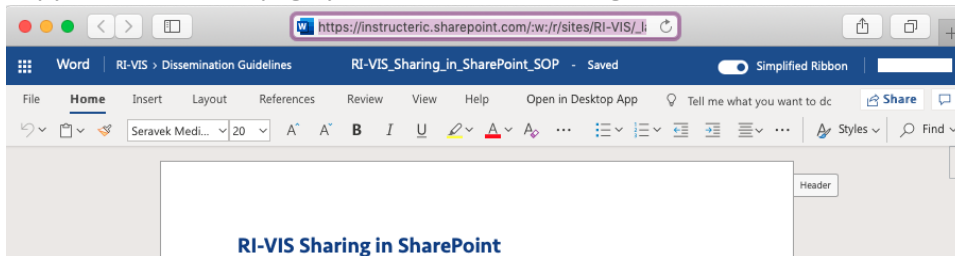
3. Send this URL to internal collaborators. These individuals must already be a member of the RI-VIS SharePoint in order to view the document or folder. If they are having issues viewing the file/folder the SOP Connecting to SharePoint may help.

Sharing documents/folders with external collaborators

If you are working on documents or folders with partners outside of the consortium there are a number of ways to share files with them. Follow the general steps below and then choose which method of sharing is most appropriate for the items you wish to share.

1. In the SharePoint online interface click the three vertical dots beside the item (file or folder) you wish to share.
2. In the menu which opens select "Share"

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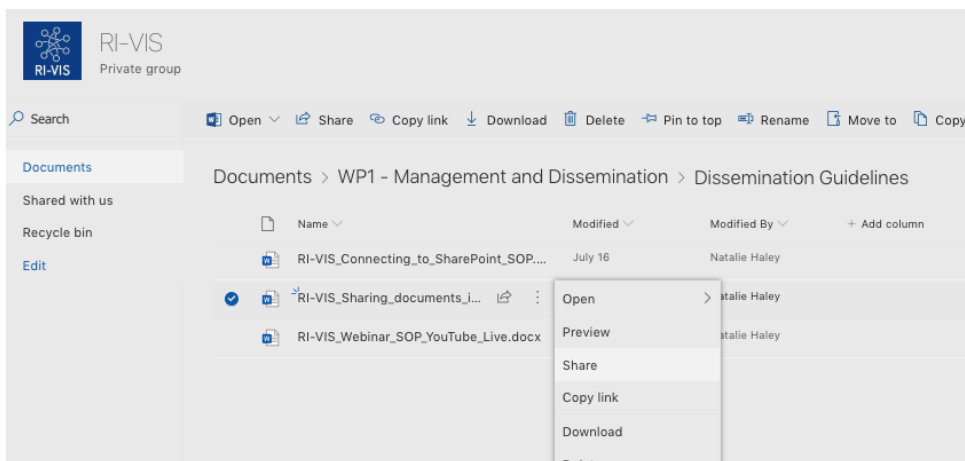
3. A box will appear with customisable sharing settings. Here you can choose which type of sharing you require, and who to share with.
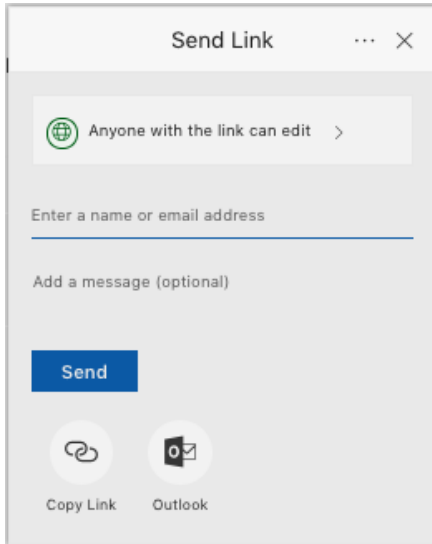

4. Click on the arrow beside "Anyone with the link can edit" to open up more detailed sharing settings.
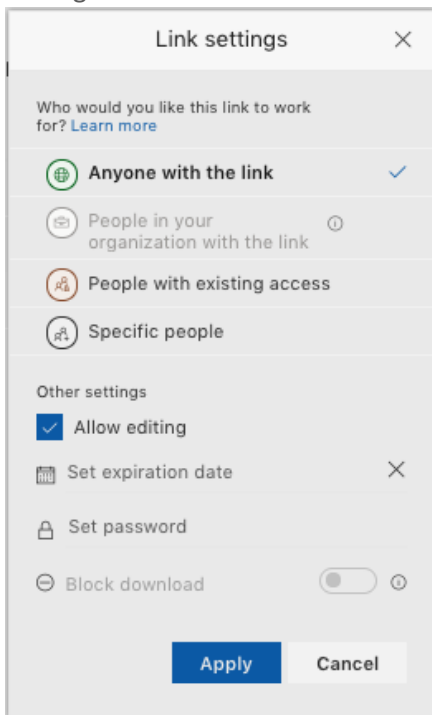
5. If needed, you can restrict access so that invited users cannot edit (view only) the shared document by unchecking the "Allow editing" checkbox.
6. You can also set an expiration date (after which point the invited user will no longer have access), block users from downloading files and set a password needed to access the document if required using the other settings below.
7. Click apply to change settings

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Grant access to individuals by email

8. Select "Specific people" under "Who would you like this link to work for"
9. Click apply to change settings
10. Enter the email addresses of people you would like to share the item with.
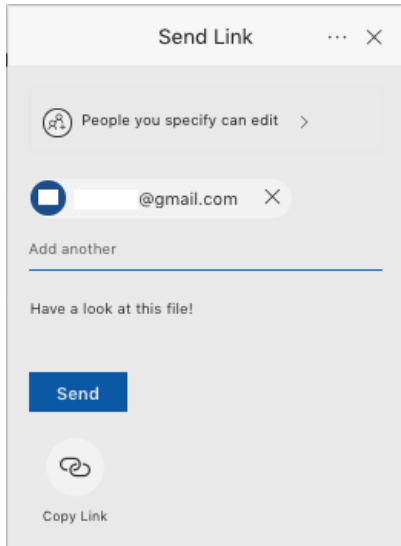

11. DO NOT use the built-in sending functionality as this does not consistently work.
12. After you have entered all of the email addresses click "Copy link" below the send button and copy and paste the link into an email message to send to the same people you have listed.
13. The invitees will then have to create Microsoft accounts associated with the email address you invited (see SOP Connecting to SharePoint steps 3-10) and then login to view the file/folder.

Generate and share a public link

7. Select "Anyone with the link" under "Who would you like this link to work for"
8. Copy the link and send it in an email to anyone you wish to share the file/folder with.
9. Beware that this link is public and therefore it can be forwarded on and shared with others that you did not explicitly invite. If a document is confidential, contains personally identifying data, or anything sensitive do not share it in this way but choose "Specific people" instead.
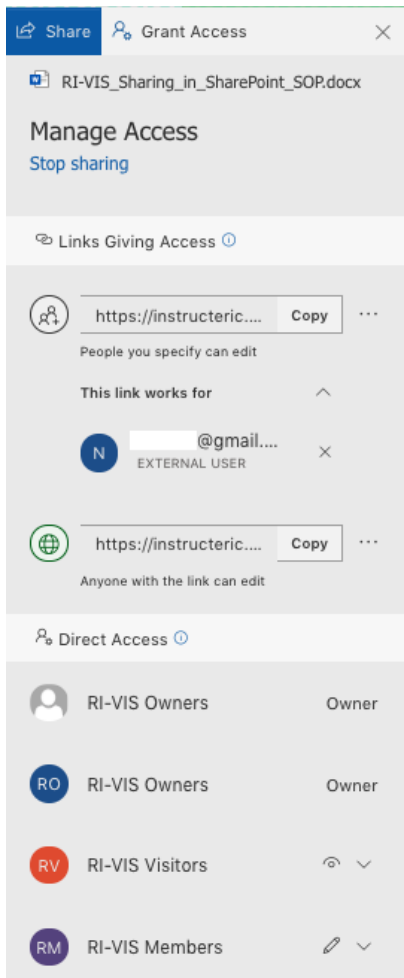
Stop sharing / revoke access

1. Locate the file or folder, click the three vertical dots and then "Details"
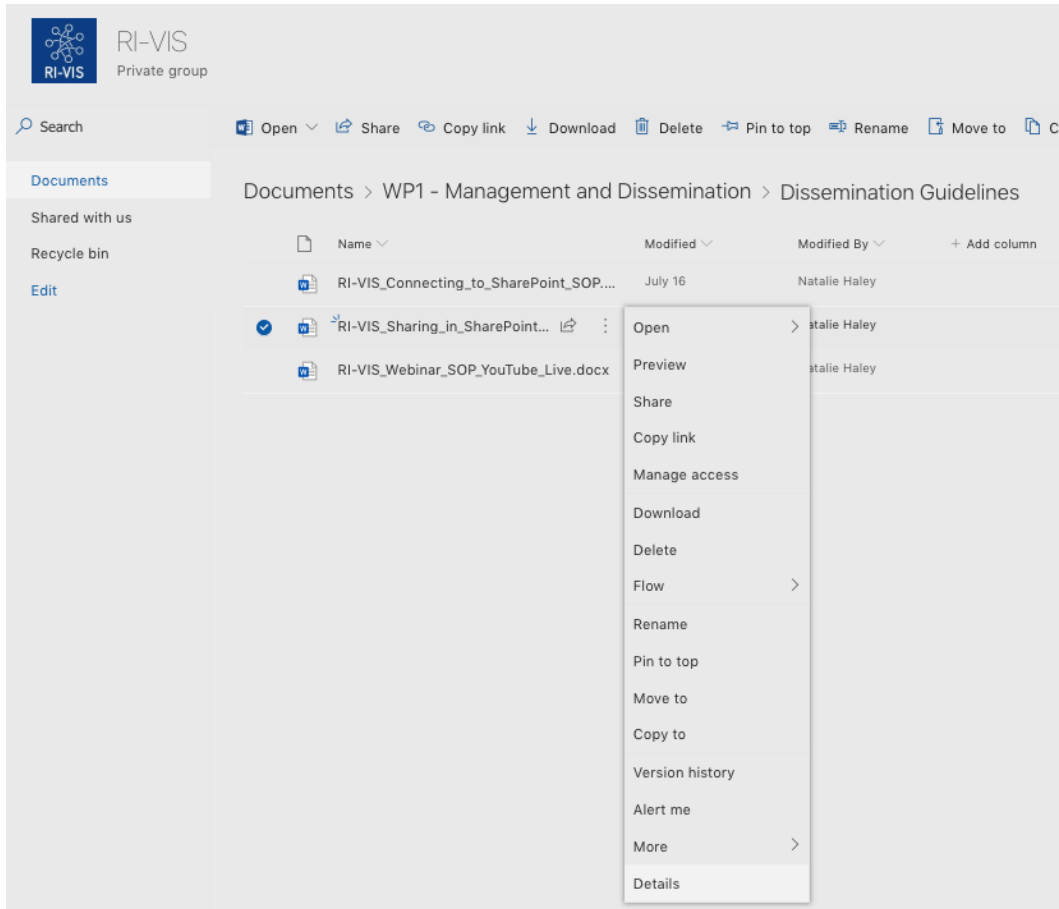
2. A sidebar should open on the right-hand side showing details for the document or folder.
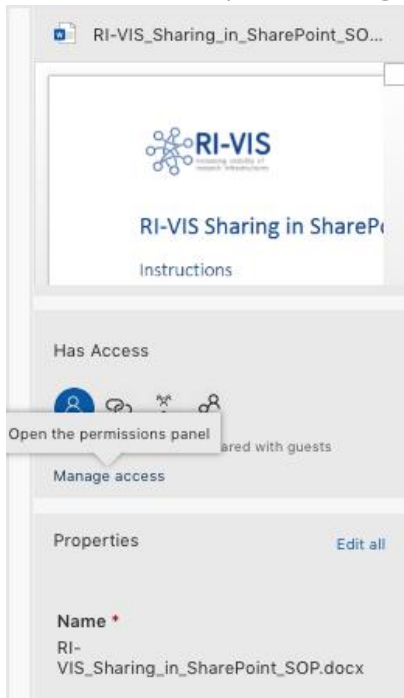
3. Click "Manage access" to see all of the people and links the item is shared with.

4. Under the heading "Links giving access" click the three horizontal dots next to the link you wish to remove entirely, or remove a user from to expand the menu.
5. Click the cross next the user or link you wish to remove.

Troubleshooting

I can't access the SharePoint site myself

Check that you are logged in to the correct Microsoft account (this should be the account you received the SharePoint invitation email to). See the SOP Connecting to SharePoint for more information and troubleshooting.

Other issues

If you are experiencing any other issues with the SharePoint site, please contact coordinator@ri-vis.eu with as much detail as you can about the problem. Screenshots of any errors are particularly helpful in diagnosing the issue.