Sharing files outside of the organization with SharePoint

Occasionally sharing files with people outside of the Denver Botanic Gardens organization is require. This protocol describes the process by which to do so using SharePoint. Please remove access and delete duplicated files and folders when they are no longer needed.

Getting Started

- There are two methods for sharing files. **Option A is safer** than Option B, as it limits the breadth of access and in theory is only sharing copies of our files. For either option, you will need the email address of the person or people you intend to share files with.
  A. If there are specific files to be shared, create a folder for them within the designated space in the Research Team's site library: OutsideOrganizationSharing
  B. If you need to share the entire contents of an existing folder or space, the same steps can be taken for that location, but be thoughtful and careful about the access you grant to people outside our organization. It is possible for people to delete, move, or somehow corrupt our files.

Creating a folder to be shared

Note: if using option B from above, you will not need to create a new folder, so proceed to the next step

- Using your internet browser, navigate to the Research Site and select "Documents" on the left pane.
- Then navigate to the OutsideOrganizationSharing folder in the site library
- Select "New" and "Folder" and name the folder using proper naming convention standards
  - Good folder names include the date created, an idea of what the folder contains, and who they are being shared with. Here are some examples

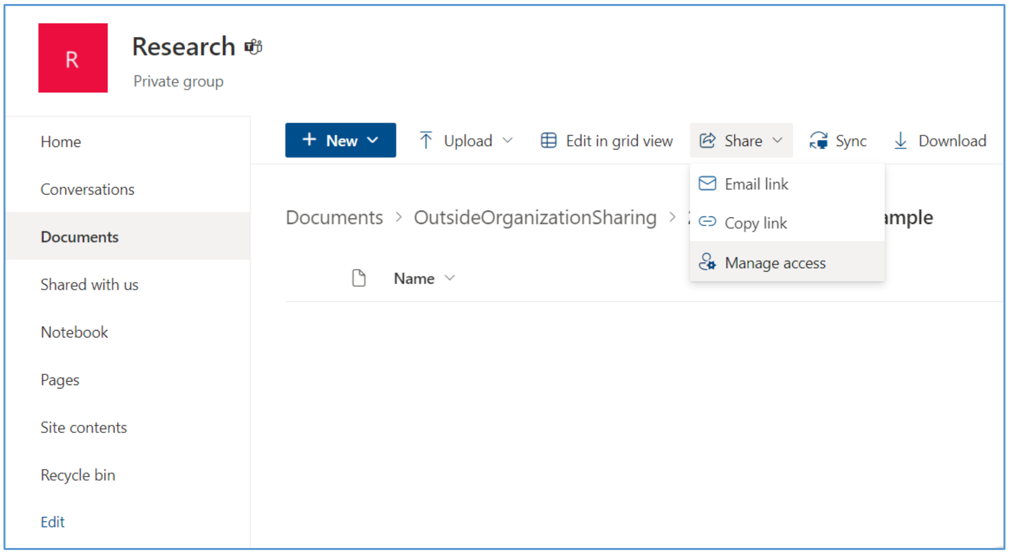
20230815_HelianthusSpecimens_VincentHannaBotanicalIllustator

20230101_DraftProposal_EllenRipleyBLM

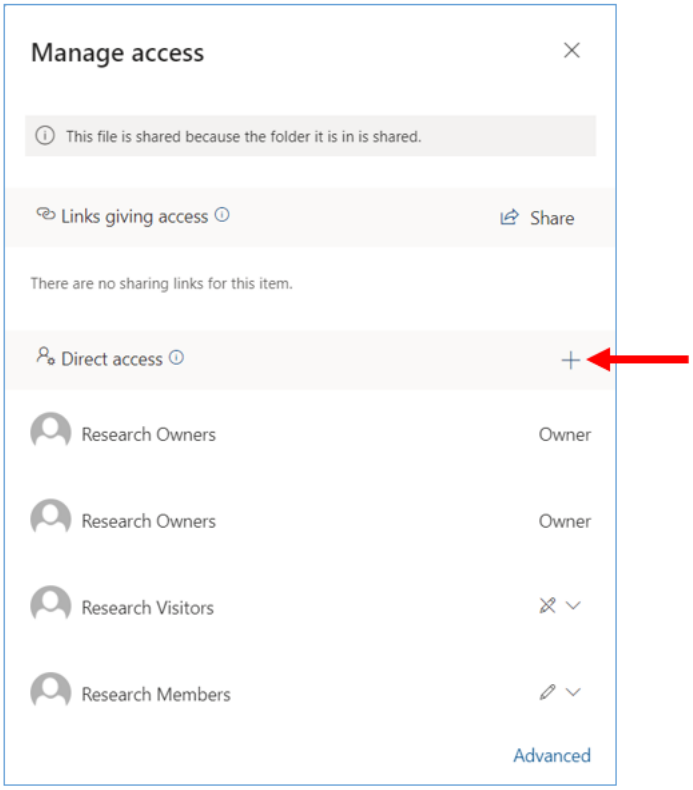
20220830_FungariumEnvironmentalData_HenryJonesDMNS

Sharing the folder and all its contents

- Navigate to the page within the folder and its contents are displayed
- Near the top of the page select "Share" then "Manage access"


R
Research
Private group
Home
Conversations
Documents
Shared with us
Notebook
Pages
Site contents
Recycle bin
Edit
+ New
Upload
Edit in grid view
Share
Sync
Download
Email link
Copy link
Manage access
Documents > OutsideOrganizationSharing >
mple
Name

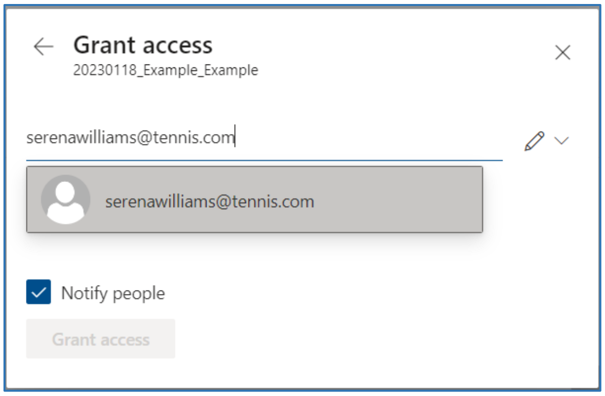
- Select the “+” button for “Direct access” in the window that opens


Manage access
Links giving access
Share
Direct access
+
Research Owners
Owner
Research Owners
Owner
Research Visitors
Research Members
Advanced

This file is shared because the folder it is in is shared.

There are no sharing links for this item.

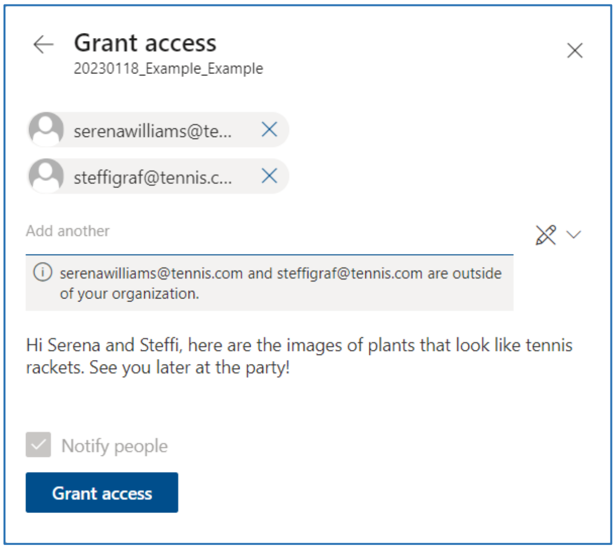
- Using the pencil icon, select whether you want the “Can Edit” or “Can view” options
- Enter the email address for the person you wish to share the files with
- Click the contact pane that appears or hit enter to add the person
- Repeat for each person you wish to share the folder and its contents


Grant access
20230118_Example_Example

serenawilliams@tennis.com

serenawilliams@tennis.com
☑ Notify people
Grant access

- Add a message if desired
- “Click Grant Access”


Grant access
20230118_Example_Example
serenawilliams@te...
steffigraf@tennis.c...
Add another

serenawilliams@tennis.com and steffigraf@tennis.com are outside of your organization.

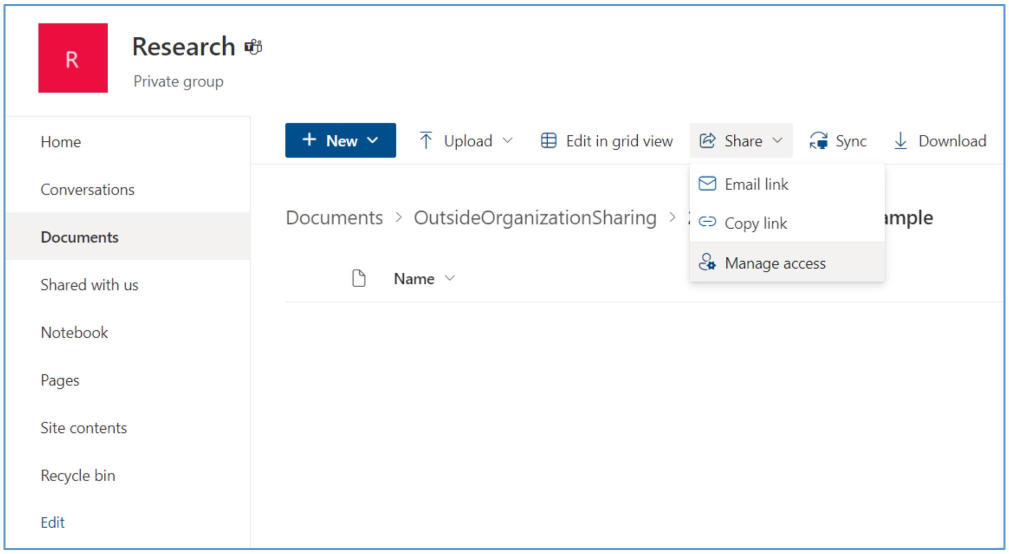
Hi Serena and Steffi, here are the images of plants that look like tennis rackets. See you later at the party!

☑ Notify people
Grant access

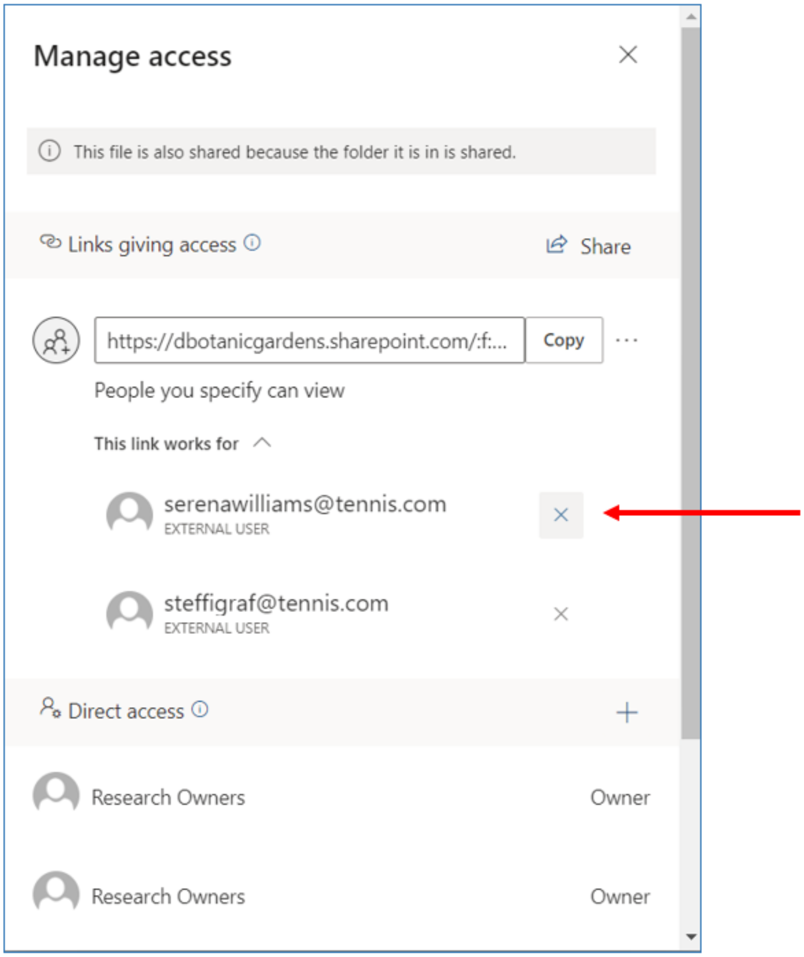
Removing access

Once access to the files is no longer needed, please remove their access

- Navigate to the page within the folder and its contents are displayed
- Near the top of the page select “Share” then “Manage access”


R
Research
Private group
Home
Conversations
Documents
Shared with us
Notebook
Pages
Site contents
Recycle bin
Edit
+ New
Upload
Edit in grid view
Share
Sync
Download
Email link
Copy link
Manage access
Documents > OutsideOrganizationSharing > ample
Name

- In the window that opens, select the down arrow under “People you specify can edit” or “People you specify can view”
- Click the “X” for each person you wish to terminate access



Manage access

This file is also shared because the folder it is in is shared.

Links giving access

Share

https://dbotanicgardens.sharepoint.com/:f:...

Copy

People you specify can view

This link works for

serenawilliams@tennis.com
EXTERNAL USER

steffigraf@tennis.com
EXTERNAL USER

Direct access

Research Owners Owner

Research Owners Owner