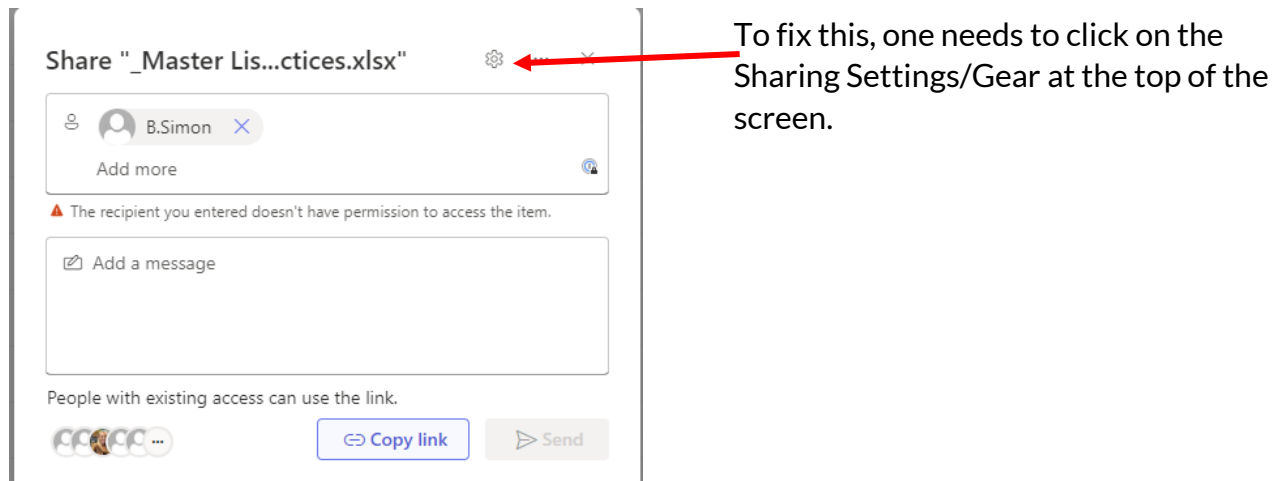


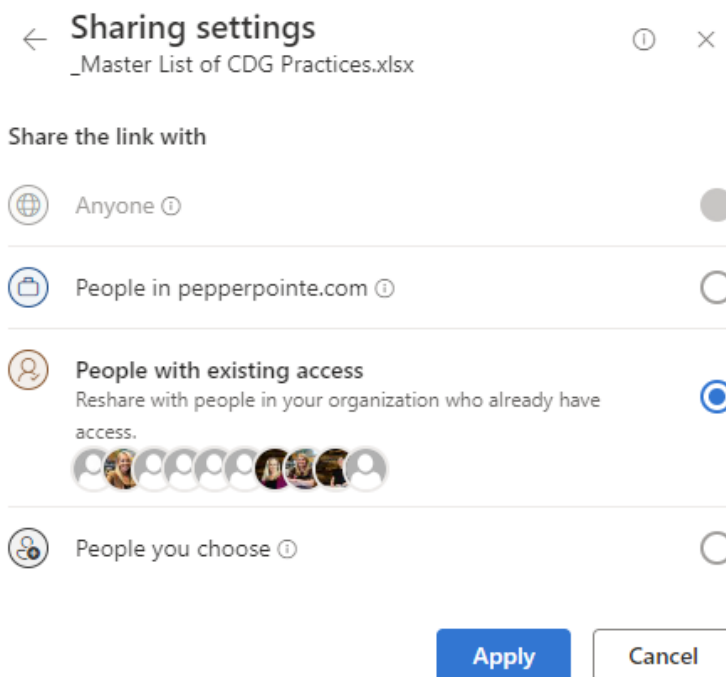
## Sharing Files

When Sharing a file, be sure you're setting the permissions correctly. The following steps detail how to send a link with Edit rights.

By Default, all files are set to be shared with people who already have access. If you go to share a file and someone does not have access, your screen will look something like this:



From this menu, one will see all of the various options when it comes to sharing a file.



For security and HIPAA compliance reasons, the option to share with **Anyone** is turned off.

If one selects to share to **People in pepperpointe.com** this will share a file with everyone from not only PepperPointe but all practices and partners within the organization. Be very cautious when selecting this option.

By default, **People with existing access** is selected and results in the error message pictured above.

To share a file out to users not on the previous option and to clear the error message, select **People you choose**.

## Sharing Files

By selecting **People you choose** one can see a **More settings** section. From this section one can change the file share permissions from **Can View** to **Can Edit** or visa versa.

The screenshot shows the 'People you choose' sharing settings. At the top, there's a header 'People you choose' with a subtext 'Share with specific people you choose inside of pepperpointe.com, using their name, group, or email.' and a blue circular icon. Below this is a 'More settings' section. The first setting is 'Can view' with a dropdown arrow. The second setting is 'Block download' with a toggle switch set to 'Off'. At the bottom, there are two buttons: 'Apply' (blue) and 'Cancel' (white with a grey border).

For Word Documents, a third option of **Can Review** is available.

The screenshot shows the 'More settings' dropdown menu. It lists three options: 'Can edit' (Make any changes), 'Can review' (Can only suggest changes), and 'Can view' (Can't make changes). The 'Can view' option is currently selected and highlighted with a grey background and a checkmark icon.


Select the permission that best fits your scenario, click apply, enter your people and notice that the error message is gone, type out a message if necessary, and click send.

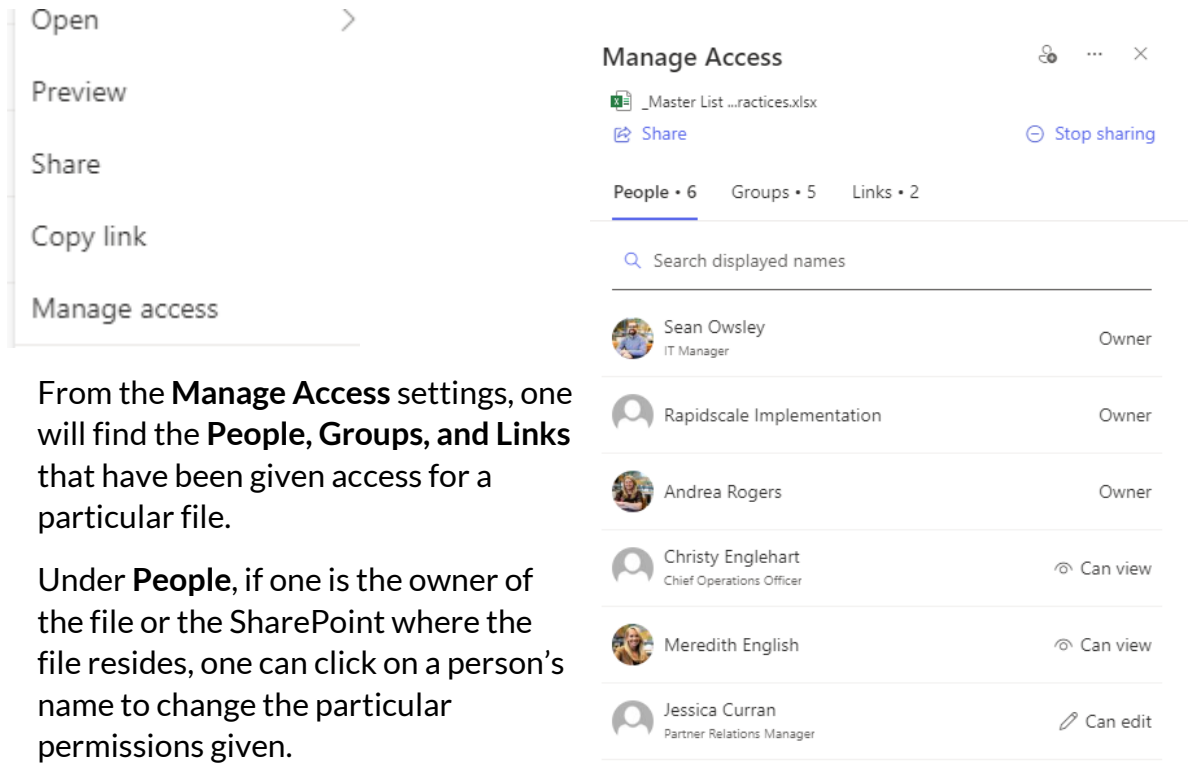
The screenshot shows a file sharing dialog box for the file '\_Master Lis...ctices.xlsx'. It has a title bar with a settings gear, a close button, and a maximize button. The main area has a header 'Share "\_Master Lis...ctices.xlsx"' and a subheader 'Add more'. Below this is a text input field containing 'Here you go! Happy Editing!'. At the bottom, there's a section 'People you specify can edit.' with a row of five user avatars. To the right of the avatars are two buttons: 'Copy link' (blue) and 'Send' (blue).

## Sharing Files

But, what happens if you realize you need to revoke access to a file?

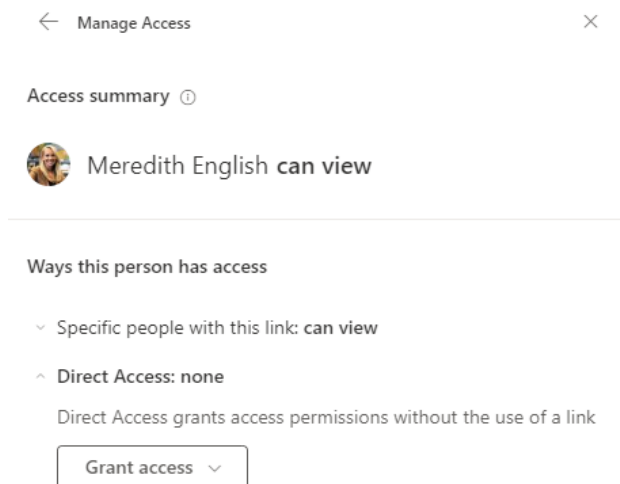
Revoking or changing permissions to a file that you are a owner of can be done through the **Manage Access** settings. This also applies if you are an owner of a SharePoint site as well.

To access the **Manage Access** settings of a file, one can click on the ellipses  found to the right of a file's name. Clicking this will display a whole host of options. Find **Manage Access** and review the access that has been given to a file.



From the **Manage Access** settings, one will find the **People, Groups, and Links** that have been given access for a particular file.

Under **People**, if one is the owner of the file or the SharePoint where the file resides, one can click on a person's name to change the particular permissions given.



From within the access settings for a particular person, one is able to see how a person has access to a file.

Again, only Owners can change these settings. They alone have the ability to change how a person can access a file with a **link** or **Direct Access** can be given to a file so that a person can view or edit.

## Sharing Files

### Manage Access

\_Master List ...ractices.xlsx

Share

Stop sharing

People • 6 Groups • 5 Links • 2

*Arrow Dental, PLLC Owners	Owner
_Arrow Dental_ PLLC Owners	Owner
PepperPointe Staff Members	Can view
_Arrow Dental_ PLLC Visitors	Can view
_Arrow Dental_ PLLC Members	Can edit

Finally, from the **Links** section, one can see what links for specific files have been shared out and what permission was given with the share. From this section, the permissions for a link can be modified by clicking on the area that says **People you specify can** \_\_\_\_.

← Manage access

https://pepperpointe0.sharepoint.com/:x:/s/ar...

Copy

People you specify can edit

Settings

Can edit

Block download

Off

This link works for

Specify people for this link

Jessica Curran  
Partner Relations Manager

Apply

Cancel

From the **Groups** section, one can see how the permissions for a file are granted based off group membership. Outside of the default SharePoint groups, additional groups can be granted access and those permissions can be edited here by document or SharePoint site owners.

People • 6 Groups • 5 Links • 2

The link from the address bar of a browser works for people with existing access.

https://pepperpointe0.sharepoint.co...

Copy

People you specify can edit

This link works for ^

Jessica Curran  
Partner Relations Manager

×

https://pepperpointe0.sharepoint.co...

Copy

People you specify can view

This link works for ^

Christy Englehart  
Chief Operations Officer

×

Meredith English

×

PepperPointe Staff Members

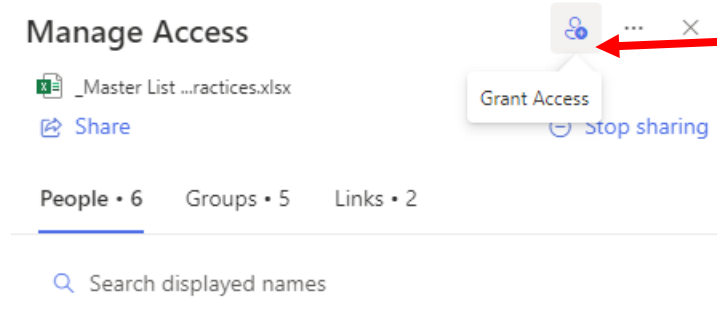
×

In this section, more people can be added to a share link and the permissions can be changed from **Can Edit** to **Can View** or visa versa.

## Sharing Files

As a note, **Manage Access** can also be accessed from within a document as well by clicking on the share button.

The **Manage Access** settings also allows for you to **Grant Access** to a file, which works in the same way as sharing, but gives the **Direct Access** permission to a file.



**Manage Access**

\_Master List ...ractices.xlsx

Share

Grant Access

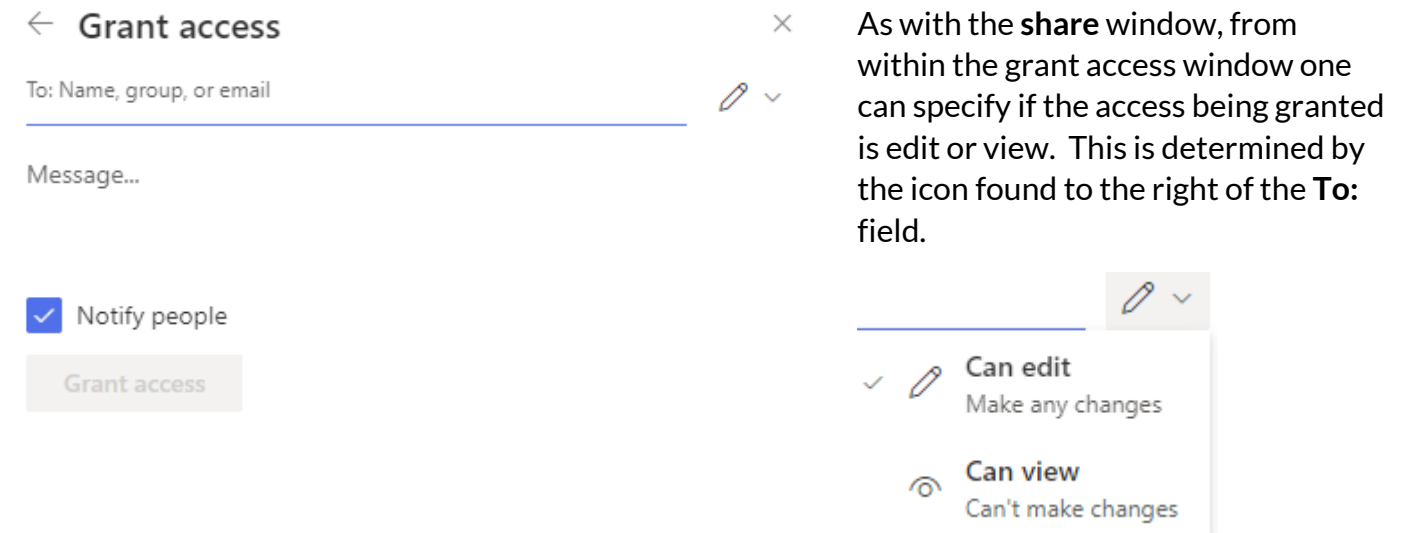
Stop sharing

People • 6   Groups • 5   Links • 2

Search displayed names

To **Grant Access**, click on the person icon with the plus symbol beside it found towards the top of the settings window.

Once selected, the **Grant Access** window will open and one will be then be able to grant access to an individual or an entire group simply by searching for the name.



← **Grant access**

To: Name, group, or email

Message...

☒ Notify people

Grant access

Can edit  
Make any changes

Can view  
Can't make changes

As with the **share** window, from within the grant access window one can specify if the access being granted is edit or view. This is determined by the icon found to the right of the **To:** field.

As always, if you have any questions, please reach out to [help@pepperpointe.com](mailto:help@pepperpointe.com) or call 859-810-8050.