



SharePoint Online 'Examining' Sites Managing Folders & Folder Permissions

Version 1.1 November 2021

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SharePoint Online (SPO) 'Examining' Sites Managing Folders

This quick reference guide includes sections from the 'SPO Examining Sites Administrator Guide' and outlines how to manage folders and folder / document permissions within a SharePoint Online site.

This quick reference guide covers the following help topics:

A) Managing Folders

- How do I create folders within examining sites?
- How do I rename a folder?
- How do I copy (duplicate) one or more folders?
- How do I move (relocate) one or more folders?
- How do I delete one or more folders?

B) Managing Folder Permissions

- How do I restrict access to a folder to just one or a number of specific individuals (or SharePoint groups)?
- How do I give one or more specific individuals (or SharePoint groups) access to a folder (without changing who already has access to it)?
- How do I give one or more specific individuals (or SharePoint groups) access to a folder (that has restricted folders within it)?
- How do I give users from other departments access to a folder?
- How can I see who has access to a folder within a workspace?
- How do I reset a folder's permissions (if access to the folder has been restricted)?
- How do I remove an individual's access to a folder (if they have been given direct access to it)?
- How do I remove an individual's access to ALL folders that they have been given 'direct access' to within a workspace?

C) Managing Documents Permissions

- How do I restrict access to a document within a site?
- How do I give an individual access to a document within a site (without changing who already has access to it)?
- How can I see who has access to a document within a folder?
- How do I remove an individual's access to a document (if they have been given direct access to it)?

For an overview of what SPO examining sites are and what they include see the 'SPO Examining Sites - Getting Started Guide' or the full 'SPO Examining Sites Administrator Guide'.

If you prefer to see all guidance in one document, see the '**SPO Examining Sites Administrator Guide**' which contains full details of how to set-up, manage and maintain all of the aspects of your SPO examining site(s).

The full Administrator Guide and the quick reference guides are currently available within the SharePoint Online user guidance section on the <u>Online Coursework Submissions webpage.</u>

Getting Support

If you need advice and support in relation to SharePoint Online 'examining' sites then please contact student.systems@admin.ox.ac.uk.

SPO Examining Sites – Managing Folders

Introduction to Managing Folders in SharePoint Online Sites

It is straightforward to **create**, **rename**, and **delete** folders within any section of an examining site and to apply specific permissions to those folders where appropriate.

You are free to add folders in whatever structure is appropriate for your department within an examining site.

It is also possible to **copy** and **move** folders where required – this is a helpful way of relocating or duplicating folders (and any documents within them) without having to manually create new folders and re-upload documents:

- **MOVING** folders **relocates** the folders (and the content within them) to another location so that they are no longer in their original location
 - This feature may be useful to move mark sheets, for example, from the Markers Workspace to an Exam Board Workspace once marking has been completed
- **COPYING** folders **duplicates** them so that the original folders stay in the original location and a copy of the folders (and the content within them) is created in another location within the same or another site
 - This feature may be useful to replicate the folder structure you require within the exam board sections of a site, for example

NOTE: if you move or copy folders that have unique (restricted) permissions, or that individuals have been given direct access to, you should double check whether the unique permissions and individuals who have been given direct access have been retained once the folder has been copied or moved.

For more information about managing folder permissions see the '<u>Managing Folder Permissions</u>' section of this guide.

Who can 'Manage' Folders in a SharePoint Examining Site?

As an administrator with 'Full Control' you are able to manage (i.e. create, rename, delete and copy/move) folders throughout the site. You can also **share** folders.

Users are not able to 'manage' folders in sections or folders they only have 'Read' access to.

Users with 'Contribute' access to a section or folder within any SharePoint site can create, rename, delete, move and copy folders and documents within the sections and folders they have 'Contribute' access to. However, users with 'Contribute' access **cannot share** folders with anyone else.

The same details and rules outlined above apply to **documents/files** within SharePoint sites also.

Managing Folders – Key Guidance Topics

- How do I create folders within examining sites?
- How do I rename a folder?
- How do I copy (duplicate) one or more folders?
- How do I move (relocate) one or more folders?
- How do I delete one or more folders?

How do I CREATE folders within examining sites?

You are free to add folders in whatever structure is appropriate for your department within an examining site.

For example, it is assumed that within an 'exam board' section of an examining site that you may want folders including the following (along with any others that are required):

CMLA Exa	im Board
D	Name \vee
-	1. Exam Board Meeting Documents
-	2. Exam Board Chair Documents
-	3. External Examiners Documents
-	4. Mitigating Circumstances Documents

To create a folder within any section or existing folder within an examining site:

- 1. Navigate to the section or existing folder within which you want to create a folder
- Click on the 'New' button in the top left hand side of the view and select 'Folder'



3. Enter a folder name in 'Create a folder' window and click 'Create'



The folder will be visible in the view in which you've created it



How do I RENAME a folder?

To rename a folder:

- Select the folder you want to rename by ticking the tick box on the left hand side of the folder
- 2. Then click on the three-dot 'Show actions' menu for the folder



3. Select 'Rename' from the list of actions displayed



4. Rename the folder in the 'Rename' window and click 'Rename'



5. The folder name will now have been updated with the revised name



How do I COPY (duplicate) one or more folders?

Within SharePoint Online it is possible to copy (duplicate) one or more folders (and the documents within them) to another location either within the same site or to another site if appropriate.

Copying folders **duplicates** them so that the original folders stay in the original location and a copy of the folders is created in another location within the same or another site. Note that when you copy folders the **documents within them are copied also**.

This feature may be used to replicate the folder structure within the exam board sections of a site, for example.

To copy (duplicate) one or more folders (and any content within them):

- Select the folder(s) that you want to copy by ticking the tick box on the left hand side of the folder(s) you wish to copy (see screenshot below)
- Click on 'Copy to' option above the folders in the page of the site you are in

Edit in grid view	⊥ Download	📋 Delete	5) I	Nove t	o [] Copy to
CMLA Exam Bo	bard				
🗋 Nam	e 🗸				Modified \vee
오 🚞 1. Exa	im Board Meeting	jD ⊯	5	:	Monday at 1:03 PI
📀 🔽 2. Exa	am Board Chair D	oc 🖻	5	:	Monday at 1:03 PI
📀 🚞 3. Ext	ternal Examiners [Do 🖻	5	:	Monday at 1:03 PI
오 📜 4. Mi	tigating Circumst	an 🖻	51	:	Monday at 1:03 PI

A list of sites will be provided in the 'Places' window that opens on the right hand side of the screen – with the site you are in at the top of the 'Nexus 365' list:

	Copy 4 items ×
(Places
	Choose a destination
	Current Library
	Your OneDrive
	Nexus365
5	Dept X UG Examining Site (Prototype)
	TTS853 e-Assessment
	ADMN - OII MSc Exam Boards (JSSI & JSDS)
	IT Services - BA Practice
	Inclusive Teaching Enhancements (ITS860)
	IT Services - Business Analysis
	Canvas Oxford Programme
	Nexus365 Sharepoint Online Service
	Browse sites

 Navigate to the place where you want to copy the folders to – either another area within the site the folders are already in or another site altogether

If the site you want to copy the folders to is not in the list click on 'Browse sites' at the bottom of the window and select the relevant site from the list that's displayed

 Once you have selected the location where you want to copy the folders to, click 'Copy here'

Copy 4 items ×
Oept X UG Examining Site (CELA Exam
Choose a destination
Exam Board MT21 Documents
다. New folder
Copy here

5. The folders and the documents within them will be copied to the selected location and a message will be displayed in the location from which the folders are being copied once that has been completed



To move one or more **documents** within a folder (instead of a folder) repeat the same steps but select the documents you wish to move in step 1 above.

How do I MOVE (relocate) one or more folders?

Within SharePoint Online it is possible to move one or more folders to another location within the same examining site or another SharePoint site if appropriate.

Moving folders **relocates** the folders to another location so that they are no longer in their original location. If you want to create a duplicate copy of the folders (and documents within them) and leave the original folders in the original location – see 'How do I <u>COPY</u> one or more folders'.

To move (relocate) one or more folders (and any content within them):

- 1. Select the folder(s) that you want to move by ticking the tick box on the left hand side of the folder(s) you wish to move (see screenshot below)
- 2. Click on 'Move to' option above the folders in the page of the site you are in

🗄 Edit in grid	view 🛓 Download 🗎 I	Delete	50 N	/love to	🗋 Copy to
CMLA Exa	m Board				
	Name \vee				Modified \vee
o 🖿	1. Exam Board Meeting D	Ē	Ð	:	Monday at 1:03 Pl
• 🛋	2. Exam Board Chair Doc	È	Ð	:	Monday at 1:03 Pl
•	3. External Examiners Do	È	51	:	Monday at 1:03 P
o =	4. Mitigating Circumstan	È	Ð	:	Monday at 1:03 Pl

NOTE: if you move or copy folders that have unique (restricted) permissions, or that individuals have been given direct access to, double check whether the unique permissions and individuals who have been given direct access have been retained once the folder has been copied or moved.

For more information about managing folder permissions see the '<u>Managing Folder Permissions</u>' section of this guide.

How do I DELETE one or more folders?

To delete a folder:

- 1. Navigate to the folder you want to delete
- 2. Then click on the three-dot 'Show actions' menu for the folder and select the 'Delete' option



To delete multiple folders at once:

- 1. Select the folders that you want to delete by ticking the tick box on the left hand side of the folders
- 2. Click on the 'Delete' option above the folders



Deleting & Restoring Items and Using the Recycle Bin

Within a SPO site it is possible to delete:

- Sections of a site including all of their contents
- Folders including all of their contents
- Individual files and documents

The Recycle Bin

Please note the following details regarding items in SPO sites that are deleted:

- Items that are deleted are sent to the recycle bin
- Items are retained for 93 days from the time they are deleted and can be restored in that time
- Any SPO user can delete items that they have deleted that are in the recycle bin
- Items deleted from the recycle bin are sent to the 'Second-stage recycle bin' (which is accessible to department administrators)
- If something is deleted from the recycle bin it will be in the second-stage recycle bin for the remainder of the 93 days (from the point of its original deletion) and it can be restored by department administrators in that time
- After 93 days deleted items can no longer be restored by any Oxford users but they can be restored by Microsoft Support if requested within 14 days (contact Oxford's SPO support team if that is required)
- If items, such as folders, that are deleted have unique permissions (e.g. they have been restricted to specific users) the unique permissions are restored when the folders are restored (but you should check this once the item has been restored)

How do I restore a deleted item?

To restore a deleted item:

 Navigate to the Recycle bin (see the link at the bottom of the LH site menu)

	_
Home	
Useful Resources	
Paper Setting Workspace	
Markers Workspace	
CMLA Exam Board	
CELA Exam Board	
DMLA Exam Board	
Other Document Sharing	
Admin Workspace	
Recycle bin	

2. Select the item to restore and click 'Restore'



Note that if items, such as folders, that are deleted have unique permissions (e.g. they have been restricted to specific users) the unique permissions are restored when the folders are restored (but you should double check this once the item has been restored).

SPO Examining Sites – Managing Folder Permissions

Introduction to Managing Folder Permissions in SharePoint Online Sites

Whilst access **to** a SPO examining site and the relevant sections within it are managed via SharePoint groups, access **within** the different sections of the site can be managed using folder permissions.

By default, all users who are part of a SharePoint group can access all folders within the sections of the site they have access to.

For example:

- a) Markers added to the 'Markers' group for the site can by default access all folders within the 'Markers Workspace' unless access to relevant folders in that workspace is restricted
- b) Exam board members added to an 'XXXX Exam Board' group will have access to all folders within the associated exam board workspace (including folders containing mitigating circumstances information) unless access to relevant folders in that workspace is restricted

The above is the case because SharePoint permissions work on the principle of 'inheritance'.

Inheritance works on the basis that the permissions applied to a workspace (e.g. that all markers can access the 'Markers Workspace') will apply to all of the folders within the workspace too unless the permissions are changed within one or more of the folders in the workspace.

However, folder permissions can easily be used to restrict access to folders within sections of the site where necessary. For example:

- To restrict access to folders for specific markers in the Markers Workspace
- To restrict access to Mitigating Circumstances folders in an Exam Board workspace

Managing Folder Permissions – Key Rules

Please note the following key points to be aware of when managing folder permissions:

1. All users (apart from a few exceptions) should be part of a SharePoint Group

For the best user experience and most straightforward permissions management, a user who needs access to a folder in a workspace should also be part of the SharePoint group that has access to that workspace.

For example, it is NOT recommended that you give markers access only to a specific folder within an examining site and that you don't also add them to the 'Markers' SharePoint group within your sites.

Adding the markers to the 'Markers' SharePoint group, for example, will:

- Give them access to the 'Markers Workspace' and all folders that do not have restricted access
- Allow the markers to **navigate** to the folders that you have given them specific permissions to e.g. their own folder or a folder for an assessment that contains mark sheets etc.

There will be some exceptional cases where you will give users access to specific folders ONLY (and not also give them access to the site itself via a SharePoint group). This may be the case, for example, if you are giving users in another department access to a specific folder.

However, most users of an examining site should be granted access to a site by being added to a SharePoint group. This will give the user access to Home, Useful Resources and the relevant workspace. Access to folders within the workspaces can then be managed using folder permissions.

Giving SharePoint Groups access to Specific Folders

Similarly, if you only want a SharePoint group to have access to one or more folders within a workspace, you still need to give the SharePoint group access to the workspace as a whole so that users in the new group can navigate to any folders they've been given access to within the workspace.

2. Ensure that users can navigate to the folders they should have access to

If the folder you want to restrict access to is a **sub-folder within another folder** in a workspace, then make sure that the users that you want to be able to access the sub-folder also have **access to the folders above it** – so that they are **able to navigate to the sub-folder** within the workspace.

For example, if you want a marker to have access to their own folder a few levels down within the markers workspace – e.g. if their folder is located beneath a number of other folders such as **Markers Workspace > FHS > Dissertation > Joe Bloggs** – then the marker needs access to all of the folders above theirs to be able to navigate to their folder.

To enable users to navigate within workspaces (except into folders that are restricted to specific users only), restrict access only to the actual folders that should be accessible to specific individuals only (and not the folders above those folders also) – so that relevant users are able to successfully navigate down to folders that they should be able to access.

Other Useful Information

As well as giving specific individuals access to specific folders, you can also give SharePoint groups access to specific folders where that is the best way of managing access to a folder.

And in the same way that it is possible to restrict access to folders it is also possible to control who can see and access **specific documents / files** where that is needed too – see '<u>Managing Access to</u> <u>Documents / Files</u>' for more information.

Managing Folder Permissions – Key Guidance Topics

- How do I restrict access to a folder to just one or a number of specific individuals (or SharePoint groups)?
- How do I give one or more specific individuals (or SharePoint groups) access to a folder (without changing who already has access to it)?
- How do I give one or more specific individuals (or SharePoint groups) access to a folder (that has restricted folders within it)?
- How do I give users from other departments access to a folder?
- How can I see who has access to a folder within a workspace?
- How do I reset a folder's permissions (if access to the folder has been restricted)?
- How do I remove an individual's access to a folder (if they have been given direct access to it)?
- How do I remove an individual's access to ALL folders that they have been given 'direct access' to within a workspace?

How do I restrict access to a folder to just one or a number of specific individuals (or SharePoint groups)?

This help topic assumes:

- a) That the folder you want to restrict access to is already accessible to one or more SharePoint groups associated with the site e.g. the 'Markers' group or an 'XXXX Exam Board' group; and
- b) That you want to restrict the access to the folder to one or more specific individuals or other SharePoint groups instead

Other options to consider:

If you want to give an individual or SharePoint group access to a folder without changing who already has access to the folder, see 'How do I give one or more specific individuals (or SharePoint groups) access to a folder (without changing who already has access to it)?'

If you have previously restricted access to the folder and you want to remove the access of one or more of the specific individuals that currently have access, see 'How do I remove an individual's access to a folder?'

Alternatively, you may even want to remove someone from a SharePoint group if you no longer want them to have access to any folders within a workspace or even the site itself. See 'How do I remove users from SharePoint groups?' in the full 'SPO Examining Sites Administrator Guide' if so.

To restrict access to a folder so that only one or a number of specific individuals (or SharePoint groups) can access it, complete the following steps:

- 1. Navigate to the location of the folder you wish to restrict access to and click on the three-dot 'Show actions' menu for the folder
- 2. Select the 'Manage access' option



- 3. Within the 'Manage Access' sidebar that opens on the right hand side of the screen, remove the group(s) that you don't want to have access to the folder by completing the following steps:
 - a. Click on the arrow (next to the pencil icon) to the right of the group name and select 'Stop sharing'







Next, give the relevant individual(s) or SharePoint group(s) access to the folder by completing the steps 4 and 5 below.

NOTE: if there are sub-folders, within the folder, that are already restricted to specific individuals only AND you don't want the user(s) or group(s) – who you're giving direct access to this folder - to have access to those restricted sub-folders, see 'How do I give one or more specific individuals (or SharePoint groups) access to a folder (that has restricted folders within it)?'

 To give specific individual(s) or SharePoint groups access to the folder, click on the 'Grant access' icon ('+') within the 'Direct access' section of the 'Manage Access' sidebar on the RH side of the screen:



- 5. Within the 'Grant access' pop-up window:
 - a. Search for and select the individual(s) or SharePoint groups (one at a time) who you wish to give direct access to

Grant access 4. Mitigatinges Documents	×
To: Name, group or email	\mathcal{O} \vee

NB to share the folder with an external (Non-SSO) user simply type in their email address. Select whether the individual(s) and/or group(s) 'Can view' (view and download documents) or 'Can edit' (view, download, upload, edit documents) by clicking on the arrow (next to the pencil icon) and selecting the relevant option

Grant acce 4. Mitigatinges I	ISS ×
O John Sm	ith 🗙
Ben Jone	is X
Add another	Ø~
Message	Can edit Make any changes
	Can view Cannot make changes
Grant acces	pre

c. Untick '**Notify people**' if you don't want the individuals being given access to the folder to be notified

NB if you are giving an external user access (who has not yet logged into an Oxford SharePoint Online site) then it will not be possible to untick the 'Notify people' box

d. Click 'Grant access'

How do I give one or more specific individuals (or SharePoint groups) access to a folder (without changing who already has access to it)?

This help topic outlines how to give an individual (or SharePoint group) 'direct access' to a folder without changing who already has access to the folder.

Other options to consider:

If you want to restrict access to a folder (i.e. change its permissions) so that only one or more specific individuals can access the folder, see the following topic: <u>'How do I restrict access to a folder</u> to just a one or a number of specific individuals (or SharePoint groups)?'

If you want to give a user from another department access to an individual folder only (and not to the wider site) see 'How do I give users from other departments access to a folder?'

If you want to give an individual access to a folder that is 'unrestricted' (i.e. to a folder that anyone with access to the workspace can access) then you may want to add the individual to the SharePoint group that has access to the workspace/folder rather than giving them access to just the one folder. If this is the appropriate course of action, see '**How do I add users to SharePoint groups**?' in the full 'SPO Examining Sites Administrator Guide'

To give an individual or SharePoint group 'direct access' to a folder without changing who already has access to the folder, complete the steps outlined below.

NB if there are files or folders in the folder that are restricted to specific individuals and you don't want to give this user access to those files or folders (within the folder) follow the steps outlined in the following help topic instead: '<u>How do I give one or more specific individuals (or SharePoint groups) access to a folder (that has restricted folders within it)?</u>'

 Navigate to the location of the folder you wish to give direct access to and click on the three-dot 'Show actions' menu for the folder

Markers	Wo	orkspace > A	Assessments	5 >	Stage	> F	HS > Folders	for Markers
[1	Name \vee					Modified \vee	Modified
1		Joan Smith					August 16	James Mu
0		Joe Bloggs		Ê	57		August 16	James Mu
1		John Smith				SI	how actions	James Mu
1		Sue Jones					August 16	James Mu

2. Select the 'Manage access' option



 Click on the 'Grant access' icon ('+') within the 'Direct access' section of the 'Manage Access' sidebar on the RH side of the screen



- 4. Within the 'Grant access' pop-up window:
 - a. Search for and select the individual(s) or SharePoint groups (one at a time) who you wish to give direct access to

Grant access 4. Mitigatinges Documents	×
To: Name, group or email	Ø ~

NB to share the folder with an external (Non-SSO) user simply type in their email address.

> Select whether the individual(s) and/or groups 'Can view' (view and download documents) or 'Can edit' (view, download, upload, edit documents) by clicking on the arrow (next to the pencil icon) and selecting the relevant option



a. Untick '**Notify people**' if you don't want the individuals being given access to the folder to be notified

NB if you are giving an external user access (who has not yet logged into an Oxford SharePoint Online site) then it will not be possible to untick the 'Notify people' box

c. Click 'Grant access'

Note that if the user(s), who you have given access to the folder to, does not already have access to the workspace that the folder is in, then you may want to add them to the relevant SharePoint group so that they can <u>navigate</u> to the folder within the workspace.

NB they will also get access to all 'unrestricted' folders within the workspace once they are added to the SharePoint group.

If this is the appropriate course of action, see '**How do I add users to SharePoint groups?**' in the full 'SPO Examining Sites Administrator Guide'.

This also applies to SharePoint groups that you may have given access to the folder to – if that group does not already have access to the workspace that the folder is in, then you may want to give the group access to the workspace so that the users in the group can navigate within the workspace to the folder(s) they have been given access to.

See 'How do I give SharePoint groups access to workspaces within an examining site?' in the full 'SPO Examining Sites Administrator Guide'.

How do I give one or more specific individuals (or SharePoint groups) access to a folder (that has restricted folders within it)?

If there are any files or folders, **within the folder** that you want to give an individual 'direct access' to, that are restricted to a specific set of individuals only AND you don't want the user (or group) to have access to those restricted files or folders then grant the user / group access to the folder as follows:

- Navigate to the location of the folder you wish to give direct access to and click on the three-dot 'Show actions' menu for the folder
- 2. Select the 'Manage access' option



 Click on the 'Advanced' link at the bottom of the 'Manage Access' sidebar on the RH side of the screen

Joe Bloggs	×
Manage Access	
[™] Links giving access [⊙]	년 Share
There are no sharing links for this item.	
^P ₀ Direct access ⊙	+
Ben Jones	Owner
Dmytro Vasyutin	Owner
Dept X UG Owners	Owner
O Dept X UG Markers	0 ~
	Advanced

 IF the folder inherits its permissions (i.e. the 'Stop Inheriting Permissions' button is visible within the folder permissions view), then click on 'Stop Inheriting Permissions' and then click 'OK'



- 5. To **add the individual or individuals** that you would like to be able to access the folder:
 - a. Click on 'Grant Permissions'



 Search for and select the specific user(s) or Sharepoint groups that you want to have access to the folder within the box that says 'Enter names or email addresses...'

NB to share the folder with an external (Non-SSO) user simply type in their email address.

Share 'Joe Blogg	s' and its contents	×
Shared with 🗆 Owen Hu	chins, 🗌 Naomi Hood, 🗌 Laura Fenwick, and 5 more	
Invite people	Enter names or email addresses	
Get a link		
Shared with		

 c. Untick 'Share everything in this folder, even items with unique permissions' (so that the users being added don't get access to the files / folders within the folder that have unique permissions)



- d. Click on SHOW OPTIONS
- e. Select the relevant permission level: 'Read' (view/download documents) OR 'Contribute' (view/download, upload/edit document)

Select a permission level	
Et al.	
Full Control	
Design	
Edit	
Contribute	
Read	

f. Finally, click 'Share'

How do I give users from other departments access to a folder?

Whilst exam board members, markers, and paper setters have access to the site and folders within workspaces via SharePoint groups, there are times when it is appropriate to give individual users (e.g. those from other departments who don't otherwise have access to the site) access to a specific folder e.g. when sharing a series of documents relating to a student with Information Compliance within the 'Other Document Sharing' workspace.

NB if there are files or folders in the folder (that you want to give a user from another department access to) that are restricted to specific individuals and you don't want to give this user access to those files or folders (within the folder) follow the steps outlined in the following help topic instead: 'How do I give one or more specific individuals (or SharePoint groups) access to a folder (that has restricted folders within it)?'

To give a user from another department access just to a specific folder:

- Navigate to the location of the folder you wish to give direct access to and click on the three-dot 'Show actions' menu for the folder
- 2. Select the 'Manage access' option



 Click on the 'Grant access' icon ('+') within the 'Direct access' section of the 'Manage Access' sidebar on the RH side of the screen



- 4. Within the 'Grant access' pop-up window:
 - Search for and select the individual(s) (one at a time) who you wish to give direct access to



NB to share the folder with an external (Non-SSO) user simply type in their email address.

- b. Select whether the individual(s) should have 'Can view' (view and download documents) or 'Can edit' (view, download, upload, edit documents) by clicking on the arrow (next to the pencil icon) and selecting the relevant option
- c. Ensure that '**Notify people**' is ticked as that will send a link to the folder to the user



d. Click 'Grant access'

How can I see who has access to a folder within a workspace?

To see who has access to a folder within a workspace:

- Navigate to the location of the folder you wish to confirm who has access to and click on the three-dot 'Show actions' menu for the folder
- 2. Select the 'Manage access' option



- 3. The 'Manage Access' sidebar (see screenshot) shows:
 - a) The 'site collection administrators' who have access to the folder – they are the individuals listed as 'Owner'
 - b) The SharePoint groups that have access to the folder (NB to see which users are part of the SharePoint group(s), see 'How can I see which users have been added to a SharePoint group?' in the full guide)
 - c) Any individuals (including external users) that have been given direct access to the folder (who are not part of a SharePoint group that has access to the folder)



4. You can also click on the 'Advanced' link at the bottom of the 'Manage Access' sidebar to see a different 'folder permissions' view of who has access (NB the 'site collection administrators' that are listed by name in the 'Manage Access' sidebar – in the screenshot above – won't be visible in this 'folder permissions' view):

A There are limited access users on this site. Users may have limited access if an item or docu This folder has unique permissions.	ment under the site has been shared with the	n. Show users.
I II Name	Type	Permission Levels
Dept X UG Owners	SharePoint Group	Full Control
James Mundey	User	Contribute
Priya Nair	User	Contribute

How do I reset a folder's permissions (if access to the folder has been restricted)?

To 'reset' a folder's permissions if access to the folder has been restricted (so that the folder inherits the permissions from the folder or workspace it is in), complete the following steps:

- 1. Navigate to the location of the folder you wish to reset the permissions for and click on the **three-dot 'Show actions' menu** for the folder
- 2. Select the 'Manage access' option



 Click on the 'Advanced' link at the bottom of the 'Manage Access' sidebar on the RH side of the screen

Joe Bloggs	\times
Manage Access	
[™] Links giving access [©]	년 Share
There are no sharing links for this item.	
P₀ Direct access ⊙	+
🔘 Ben Jones	Owner
O Dmytro Vasyutin	Owner
Dept X UG Owners	Owner
O Dept X UG Markers	0 ~
	Advanced

 Within the folder permissions view, click on 'Delete Unique Permissions' and click 'OK'



Note that deleting a folder's unique permissions will remove the access of any users who have been given direct access to the folder (so you may want to give some or all of those users access to the folder again if appropriate).

How do I remove an individual's access to a folder (if they have been given direct access to it)?

This help topic outlines how to remove an individual's (or SharePoint group's) access to the folder if they have been given **direct access** to the folder i.e. the individual is not part of a SharePoint group that has access to it.

The scenarios in which this help topic is relevant are as follows:

- The folder has unique permissions i.e. its access is restricted to only one or more specific individuals who have been given direct access to it (including the individual whose access you now want to remove)
- b) You have given an individual from another department direct access to a folder and you want to remove the individual's access to the folder

Other options to consider:

If you want to remove an individual's access to a folder and they have access to the folder as a result of being part of a SharePoint group (that has access to the folder) then your options are:

- Restrict access to a folder so that only one or more specific individuals can access the folder and in that way the individual (whose access to the folder you want to remove) will no longer have access to the folder: see: <u>'How do I restrict access to a folder to just a one or a number of</u> <u>specific individuals (or SharePoint groups)?</u>'
- 2. Remove the user from the SharePoint group that has access to the folder if you no longer want them to have access to some or all of the folders within a workspace (depending on which folders the SharePoint group they are in has access to). See 'How do I remove users from SharePoint groups?' in the full 'SPO Examining Sites Administrator Guide'
- 3. Remove a SharePoint group's access to the folder if all of the users in the SharePoint group should not have access to the folder anymore follow the steps below to do that but rather than removing an individual user remove the SharePoint group instead

To remove an individual's access to a folder they have been given direct access to:

- Navigate to the location of the folder you wish to remove the individual's direct access to and click on the three-dot 'Show actions' menu for the folder
- 2. Select the 'Manage access' option

CELA Exa	m Board		
D	Name \vee	Modified \vee	Mod
	1. Exam Board Meeting Documents	September 8	Jame
	2. Exam Board Chair Documents	September 8	Jame
	3. External Examiners Documents	September 8	Jame
•	4. Mitigating Circumstan 🖻 📑	Share	me
	5. Candidate Scripts & Feedback	Copy link	me
		Manage access	

3. Within the 'Manage Access' sidebar identify the user/group whose access you want to remove, click on the dropdown icon (containing a pencil) to the right of their name and select '**Stop sharing**'

Dept X UG	Owners	Owner
🔘 Priya Nair		(2 v)
James Mun	Can edit Make any chang	ges
EXTERNAL USER	Can view Cannot make ch	anges
James Mun external user	Stop sharing	

4. Click 'Remove'

Want to remove Priya access?	Nair's	×
Remove	Cancel	

How do I remove an individual's access to ALL folders that they have been given 'direct access' to within a workspace?

This help topic outlines how to remove an individual's access to ALL folders – that they have been given 'direct access' to – within a workspace (outside of their membership of any SharePoint groups).

Other options to consider:

If you only want to remove an individual's access to a specific folder within a workspace, see '<u>How</u> do I remove an individual's access to a folder (if they have been given direct access to it)?'

To identify the specific files and folders a user has been given direct access to (outside of their membership of any SharePoint groups) see '<u>How can I see who has access to a folder within a</u> workspace?'

For how to remove individuals from SharePoint groups see '**How do I remove users from SharePoint** groups?' in the full 'SPO Examining Sites Administrator Guide'

To remove a user's access from all files or folders that they've been given direct access to within a workspace (NB you can't see 'at a glance' specifically which files and folders those are), complete the following steps:

- Click on name of the section of the site in the LH site menu within which you want to remove a user's access to all of the files and folders they've been given direct access to AND then click on the Settings 'cog' icon in the top right hand corner of the site
- 2. Select 'Library settings' from the list



 Within the workspace 'Settings' window, click on 'Permissions for this document library'



4. In the workspace permissions view, click on 'Show users'



Users who have been given direct access to some of the folders or files within the workspace (outside of SharePoint groups) are then displayed along with the SharePoint groups that have access to the workspace:



 To remove a user's access to any folders or files they have been given direct access to in the workspace (outside their membership of a SharePoint group):

a. Tick the checkbox next to their name



b. Click 'Remove User Permissions'



c. Click 'OK'



The user will no longer have access to any folders or files they have been given direct access to in the workspace (outside their membership of any SharePoint groups).

6. Repeat these steps for any other workspaces within which the user may have been given direct access to folders or files outside of their membership of any SharePoint groups – including at the site level within the 'Site permissions' view for the site itself

Managing Access to Documents / Files

Access to documents is managed in largely the same way as access to folders is managed, except that rather than navigating to the required folder to manage access you need to navigate to the relevant document or file to manage access to it.

How do I restrict access to a document within a site?

See '<u>How do I restrict access to a folder to just one or a number of specific individuals (or SharePoint groups)?</u>'

Largely the same steps apply to restricting access to a document except that rather than navigating to the required folder to manage access you need to navigate to the relevant document or file to manage access to it.

NB for obvious reasons the steps (in the above help topic) in relation to 'Share everything in this folder, even items with unique permissions' don't apply to the sharing of an individual document.

How do I give an individual access to a document within a site (without changing who already has access to it)?

See '*How do I give one or more specific individuals access to a folder (without changing who already has access to it)?*'

The same steps apply to giving someone access to a document except that rather than navigating to the required folder to manage access you need to navigate to the relevant document or file to manage access to it.

How can I see who has access to a document within a folder?

See 'How can I see who has access to a folder within a workspace?'

The same steps apply to seeing who has access to a document except that rather than navigating to the required folder to manage access you need to navigate to the relevant document or file to manage access to it.

How do I remove an individual's access to a document (if they have been given direct access to it)?

See 'How do I remove an individual's access to a folder (if they have been given direct access to it)?'

The same steps apply to removing someone's access to a document (if they have been given direct access to it) except that rather than navigating to the required folder to manage access you need to navigate to the relevant document or file to manage access to it.