

Share files with the right people

Make a deliberate choice about the document, its audience and the permissions before sending a Teams or OneDrive link.

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BEFORE YOU START

Confirm you are allowed to share the content and that it is in the correct work location. Your organisation may restrict external sharing or require additional approval.

01 Check the document and destination

Review the file for hidden sheets, comments or sensitive details that the recipient does not need. Use the intended work account and confirm the file's location before choosing Share.

For ongoing team work, use the agreed shared workspace so ownership does not depend on one person's temporary copy. Check with the team owner if you are unsure where the master document belongs.

02 Choose recipients and access

Open the link settings and choose the narrowest audience your task needs. Where available, use Specific people for named recipients rather than an unrestricted link.

Choose view access if editing is unnecessary. Recheck email addresses, the audience and permissions before sending. Do not bypass a blocked sharing option by moving the file to a personal account.

03 Review access when work ends

Use Manage access to inspect existing links and direct permissions. A person may also have access through a group, team or parent location, so removing one link may not remove every route.

Ask the owner or IT to resolve access you cannot change safely. Agree when an external collaboration should be reviewed, and remove access that is no longer authorised through the approved process.

Your practical checklist

Share files with the right people

- ☐ Correct work account and document checked
- ☐ Sensitive or unnecessary content reviewed
- ☐ Recipients and link audience checked
- ☐ View or edit permission deliberately selected
- ☐ Existing / inherited access considered
- ☐ Access review date and owner agreed

Record the next action

Document purpose / owner (avoid confidential contents)

Approved audience and permission

Review date and follow-up action

A link setting is not a guarantee that a recipient cannot copy information. Share only content appropriate for that audience and follow your organisation's data-handling rules.

OFFICIAL SOURCES & FURTHER READING

Microsoft: share files in Teams

Microsoft: manage OneDrive and SharePoint permissions

Links open the official source. Web edition: compurep.co.za/guides/share-files-with-confidence