



# SECURE DATA MANAGEMENT GUIDELINES

## Contents

<b>ONEDRIVE BASIC GUIDE</b> .....	2
<b>Upload Files or Folders</b> .....	2
<b>Upload folders in other browsers</b> .....	2
<b>SHARING</b> .....	2
<b>Share a file or folder</b> .....	2
<b>Get a link to a file or folder that you can copy</b> .....	4
<b>Manage Access</b> .....	5
<b>Set a Password</b> .....	6
<b>Set an Expiry Date</b> .....	6
<b>HEANET FILESENDER LOGIN</b> .....	7
<b>How to send a file (or files) via Filesender</b> .....	7
<b>Receiving files from External Examiners via FileSender 2</b> .....	11
<b>How to send a voucher to an external user to use FileSender 2</b> .....	11
<b>OUTLOOK EMAIL SEARCH</b> .....	14
<b>Refine your search results</b> .....	14
<b>GENERAL GUIDANCE ON EMAILS</b> .....	15
<b>EMAIL RETENTION GUIDELINES</b> .....	15
<b>CHECKLIST BEFORE SENDING</b> .....	17
<b>HOW TO HIDE MEETING REQUEST RECIPIENTS – TEAMS</b> .....	17
<b>MEETING REQUEST FROM OUTLOOK – DESKTOP VERSION</b> .....	17
<b>MEETING REQUEST FROM OUTLOOK (OFFICE 365)</b> .....	19

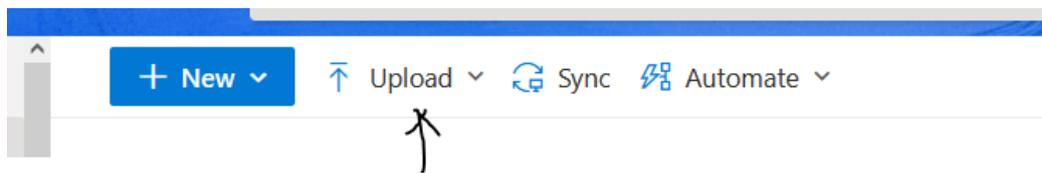
**Updated 2025**



## ONEDRIVE BASIC GUIDE

### Upload Files or Folders

1. Select **Upload**.



**Note:** In Google Chrome or Microsoft Edge, select **Upload > Folder**, **Upload > Files**.

2. Browse to Select the Folder or file/s you want to upload.
3. Select **Open**.

**Note:** You can also upload files by opening File Explorer, selecting the files you want to upload, and dragging them to OneDrive.

### Upload folders in other browsers

1. Select **New > Folder** to create a folder.
2. From the folder you want to upload, select the files.
3. Drag and drop the files into the new folder you created in OneDrive.

## SHARING

The files you store on a SharePoint site are usually available to everyone with permissions to the site, but you may want to share specific files or folders with people who don't otherwise have access to the site. When you share files and folders, you can decide whether to let people edit or just view them. You can [see who a SharePoint file is shared with](#), and [stop sharing SharePoint files or folders, or change permissions](#), at any time.

### Share a file or folder

Here's how you share files or folders in SharePoint:

1. Select the file or folder you want to share, and then select **Share**.
2. (Optional) Select the dropdown list to change the type of link. The Details pane opens, where you can change who can access the link and whether people can edit the item you're sharing.

Options for **Who would you like this link to work for** (options vary based on admin settings):

- **Anyone** gives access to anyone who receives this link, whether they receive it directly from you or forwarded from someone else. This may include people outside of your organization.

**Note:** This option is not available in SharePoint Server 2019.

- **People in <Your Organization>** gives anyone in your organization who has the link access to the file, whether they receive it directly from you or forwarded from someone else.
- **People with existing access** can be used by people who already have access to the document or folder. Use this if you just want to send a link to somebody who already has access.
- **Specific people** gives access only to the people you specify, although other people may already have access. If people forward the sharing invitation, only people who already have access to the item will be able to use the link.

**Note:** If a sharing option has been greyed out, your organization's admins may have restricted them. For example, they may choose to disable the **Anyone** option to prevent usable links being forwarded to others.

By default, **Allow editing** is turned on. If you want people to only view your files, uncheck the check box. When you're done, select **Apply**.

With **OneDrive for work or school** accounts, you can also quickly select editing permissions without having to open the sharing link settings. Simply select the pencil icon next to the **Name, group or email box**, then give the recipients edit or read-only permission.

At the bottom of the **Send link** window, the **Shared with** list shows everyone who has access to the file. Each round item has either a photo of an individual or the initials of a group that the file has been shared with. If you want to edit the access level for an individual or group, select a photo or group initials to open the **Manage Access** page.

You won't see a **Shared with** list in this window if the selected file or folder isn't currently shared with someone.

3. Enter the names of the people you want to share with and a message, if you want.
4. When you're ready to send the link, select **Send**.

## Get a link to a file or folder that you can copy

Another way to share is to get a link to a file or folder that you can copy and paste in a text message or on a website. People you share these links with can also forward your link to others.

1. In SharePoint, select **Copy link**. The link is automatically copied to your clipboard
2. (Optional) Select the dropdown list to change the type of link. The **Details** pane opens, where you can change who can access the link and whether people can edit the item you're sharing.

Options for **Who would you like this link to work for** (options vary based on admin settings):

- **Anyone** gives access to anyone who receives this link, whether they receive it directly from you or forwarded from someone else. This may include people outside of your organization.
- **People in <Your Organization>** gives anyone in your organization who has the link access to the file, whether they receive it directly from you or forwarded from someone else.
- **People with existing access** can be used by people who already have access to the document or folder. It does not change the permissions on the item. Use this if you just want to send a link to somebody who already has access.
- **Specific people** gives access only to the people you specify, although other people may already have access. If people forward the sharing invitation, only people who already have access to the item will be able to use the link.

By default, **Allow editing** is turned on. If you want people to only view your files, uncheck the check box. This can be further restricted by selecting the option to **Block download**, which means they cannot save a local copy. When you're done, select **Apply**.

With **OneDrive for work or school** accounts, you can also quickly select editing permissions without having to open the sharing link settings. Simply select the pencil icon next to the **Name, group or email box**, then give the recipients edit or read-only permission.

3. Paste the link (Ctrl+V) wherever you want, such as a text message or on a website.

### Notes:

- The permission granted by a sharing link lasts only as long as the link exists. For example, when a link is disabled – see [Manage Access](#), access is revoked (though people may still have access to the file via other means).

- People can only gain access to the file or folder by following a link that has been sent to them. Until they follow the link, they won't have access to the file or folder, and they won't find it by using Search.
- **Note** – if you delete the folder or file without removing access – the link will remain accessible in the deleted items folder.
- When **Allow editing** is selected: After they sign in, people in your organization can edit, copy, or download the files. When **Allow editing** isn't selected, people in your organization can view, and may be able to copy or download the files.
- Site administrators can restrict sharing so that only owners can share files and sites.
- If site administrators have not restricted sharing to site owners, any person with Edit permissions to a file or folder can share that file or folder with others by selecting **Share** or **Copy link**. People who don't have edit permissions can use **Copy link** to get a link that will work for people who already have permissions to the file or folder.

## Manage Access

### Stop or change sharing

Files and folders can be shared by sending someone a sharing link, or by giving them direct access to the file or folder. (People may also have access to a file or folder if they've been given access to the site itself.)

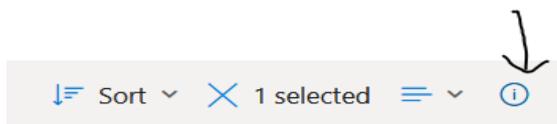
If you are the file owner, you can stop sharing the file or folder.

If someone has been given direct access, or has access through a specific people link, you can also change the sharing permissions between view and edit.

Here are the steps:

1. Select the file or folder you want to stop sharing.
2. Select **Information** in the upper-right corner to open the Details pane.

**Note:** (The **Information** icon is just below your profile picture. If you don't see it, make sure you only have one file or folder selected - it won't display if you have multiple items selected.)



3. On the **Details** pane, under the **Has Access** header, you'll see the **People** icon, the **Links** icon, and/or the **Email** icon. These options vary depending on how you have shared the file or folder. Select **Manage access** and:
  - To stop sharing the file entirely, click **Stop sharing**.

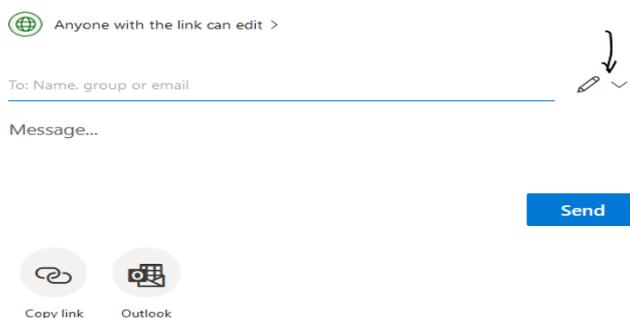
- To delete a sharing link, click the ... next to the link, then click the **X** next to the link to remove it. (You'll get a prompt asking you if you're sure you want to delete the link - if so, click **Delete link**.)
- To stop sharing with specific people, expand the list under a specific people link and click the **X** to remove someone.
- To change permissions or stop sharing with someone who has direct access, under **Direct Access**, click the dropdown next to the person's name and choose the option that you want.

## Set a Password

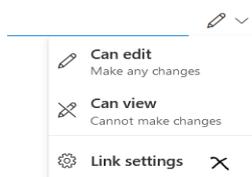
- Access your **OneDrive**. Log in using your Microsoft credentials.
- Select any files and/or folders that you wish to share.
- Click on the **“Share”** button, located in the upper left corner of the screen.
- Once the **“Share”** dialog box opens, select the **“Set password”** option.
- Input the password you wish to add to the link.
- Select the **“Get a link”** option.
- The link that pops up now can be copied, and if shared it will ask for a password before its contents can be interacted with.

## Set an Expiry Date

- In your browser, select a file or folder.
- Select **Share**.



- Select **Link settings**.



- Set an expiration date.

Other settings

Allow editing

Set expiration date

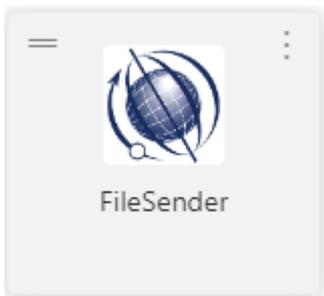
Set password

- Set a strong password (optional).
- Select **Apply**.
- Type names, email addresses, add a message and select **Send**.
  - Or copy the link and share it however you want.
- Send the password in a separate message so recipients can open the file.

## HEANET FILESENDER LOGIN

### How to send a file (or files) via Filesender

1. To begin, open 'My Apps', choose FileSender(Shown below) :



Read the message and click Logon

### Welcome to HEAnet FileSender

HEAnet FileSender is a secure way to share large files with anyone!

Login to upload your files or invite people to send you a file.

If you have received an invitation to access this site as a guest then the email will contain the information you will need to access this site and upload files.

Login

2. Select your organisation from the list. In this case, select Technological University of the Shannon: Midlands Midwest

Choose your home organisation to login to *HEAnet Filesender* **FileSender**

showing 20 of 59

Technological University of
Clear



**Technological University of the Shannon: Midlands Midwest (@tus.ie logins)**

3. Follow instructions ①②③④ to the right of the “Send a file” window. You can also click on any of the tabs at the top of this window.



HEAnet  
Ireland's National Education & Research Network

## FileSender 2

Upload
Guests
My Transfers
Help
About
Privacy
Log-off

drag & drop your files here

Clear all
Select files

From : [REDACTED]

To :

Joe.blogs@tus.ie

Enter recipient email(s)

Subject (optional) :

Message (optional) :

File Encryption

Expiry date:

Get a link instead of sending to recipients

Advanced settings

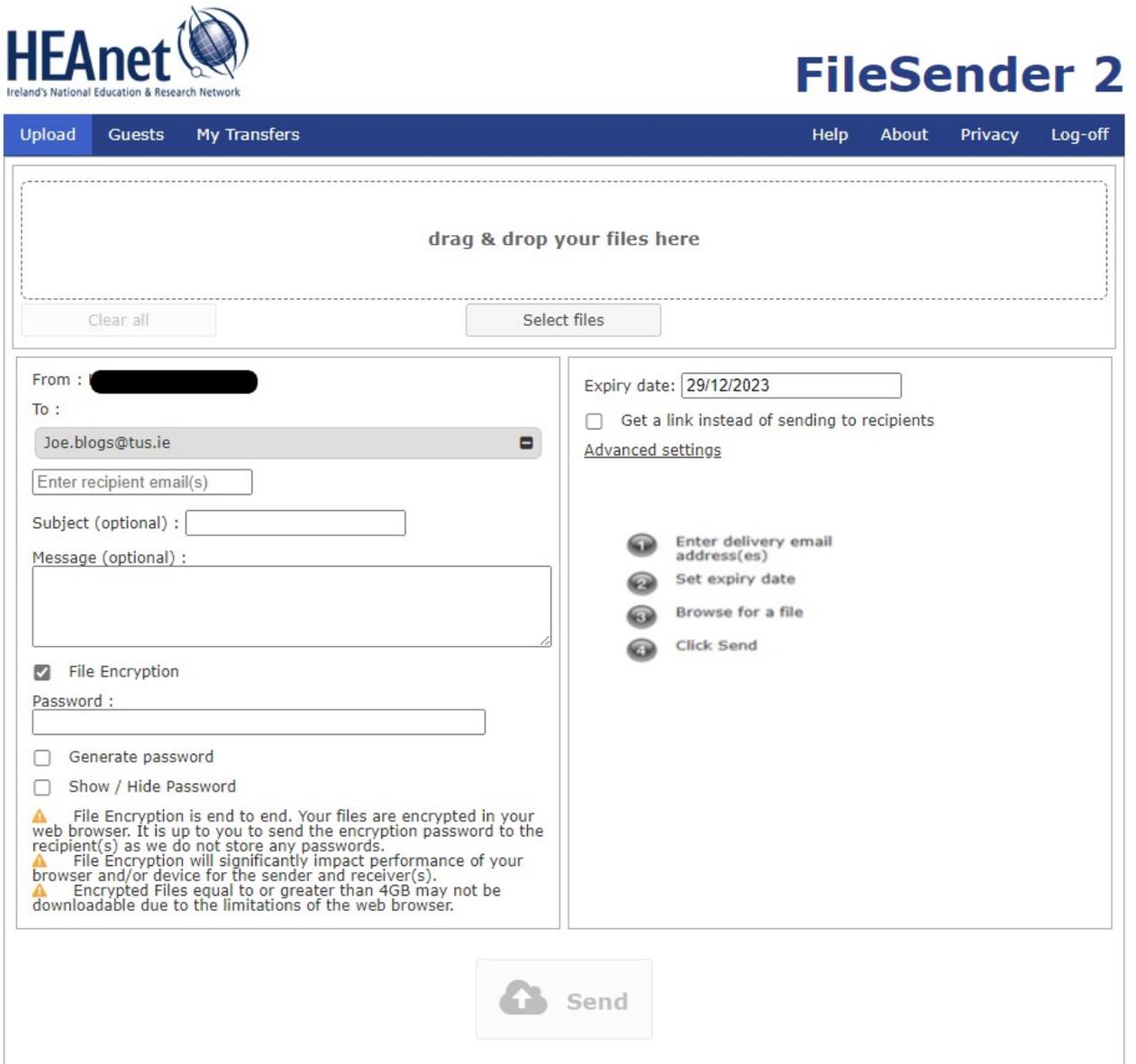
- ① Enter delivery email address(es)
- ② Set expiry date
- ③ Browse for a file
- ④ Click Send


Send

4. Follow instructions ①②③④ to the right of the “Send a file” window. The delivery email address(es) can be any valid email address(es), not just @TUS.ie email addresses.



5. To encrypt the file, tick the “Encrypt this file” box, as shown below.

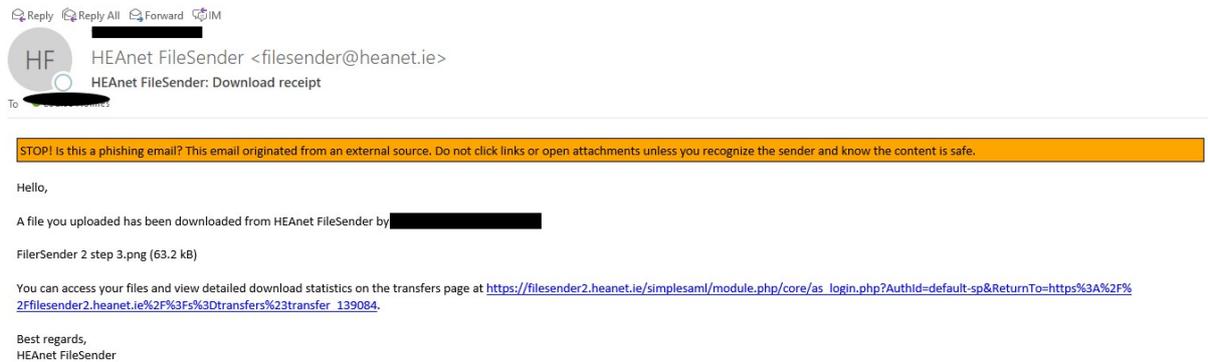


**6.** Enter a password or pass phrase and click OK.

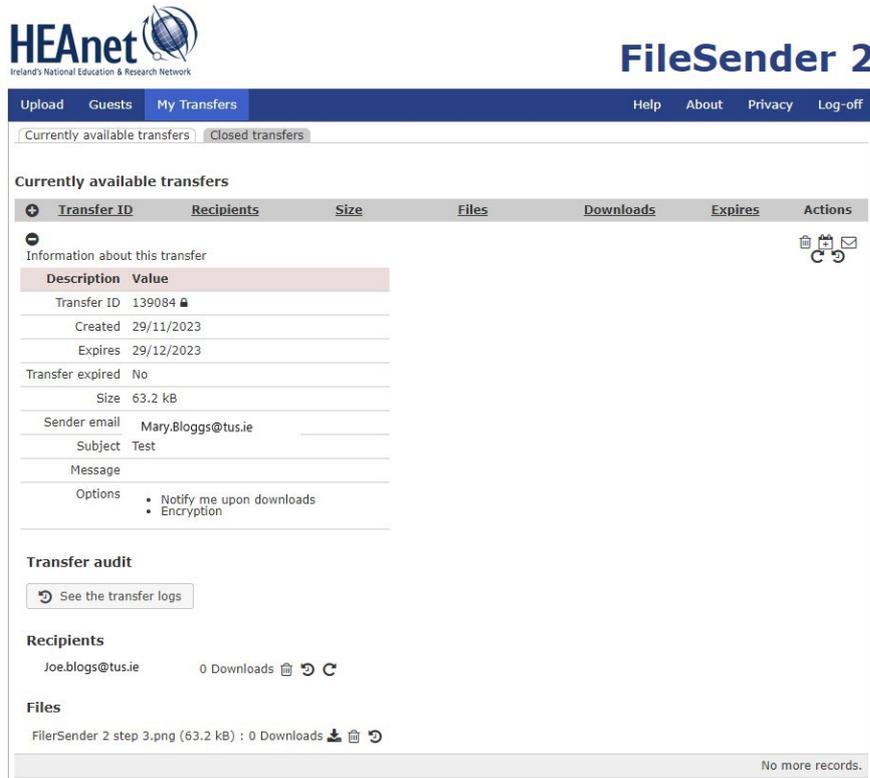
**Let the recipient know the password in a secure way:**

- Phone
- Arrange a 'per term' password with a person / dept in advance and use for the stated duration
- Email from a different email address

**7.** A HEAnet FileSender 2 link (the link to the uploaded file) is emailed to both Recipient and Sender



**8.** A message is displayed confirming that a file has been successfully uploaded to HEAnet FileSender and that a download invitation has been sent to the intended



## Receiving files from Guest Users via FileSender 2

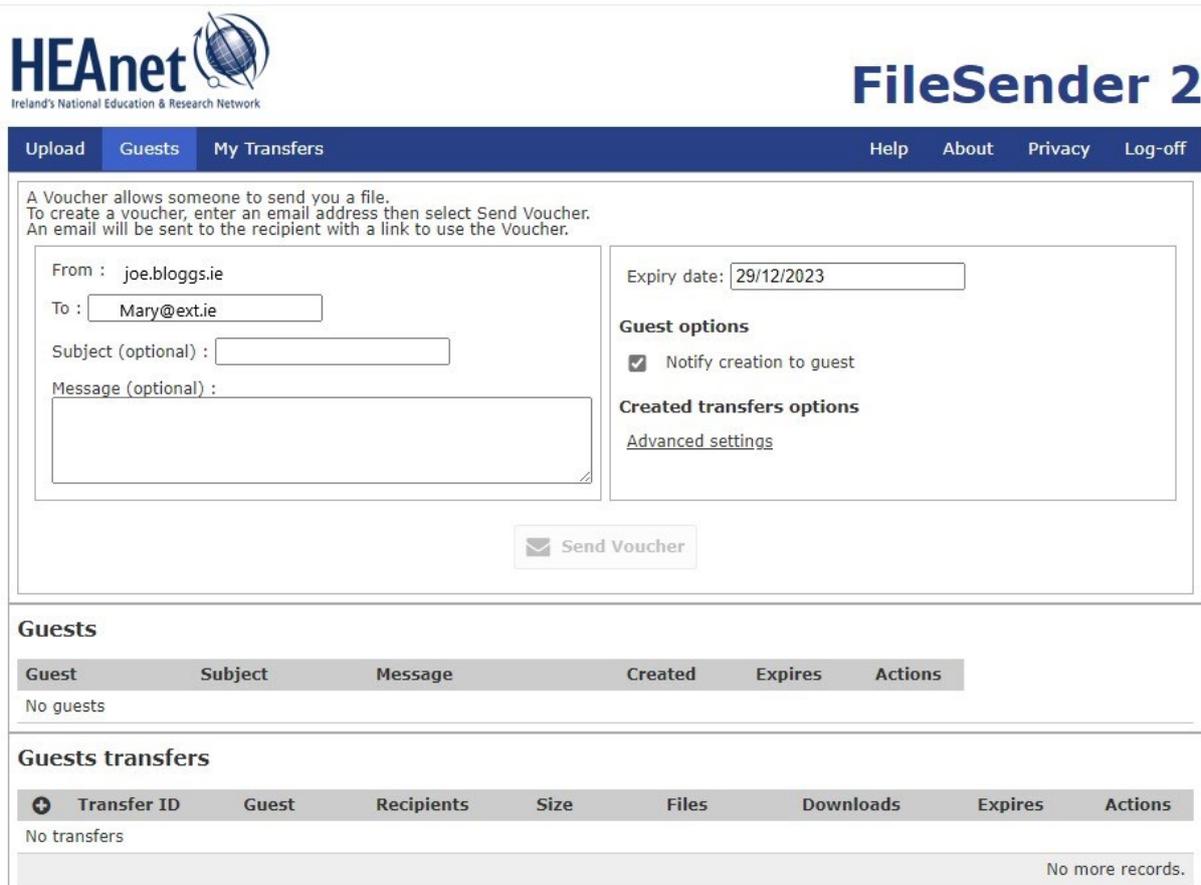
All external examiners who are within the educational system will have direct access to FileSender 2. Guests who are outside of education will not have a login to FileSender 2. It is possible to send these users a “voucher”, whereby they can then use FileSender 2 to send you a file (or a number of files zipped together). Note that a voucher will enable an external user to only send one file (or a number of files if they are firstly zipped together). See instructions on how to do this further on in this document.

## How to send a voucher to an external user to use FileSender 2

On the HEAnet FileSender 2 email page, click on the “Guests” tab to send a Voucher to a contact who currently doesn’t have access to the FileSender 2 service.

Each Voucher entitles a recipient to send one email and file using FileSender 2.

Send a Guest Voucher to an intended recipient’s email address.



The screenshot shows the HEAnet FileSender 2 interface. At the top left is the HEAnet logo with the tagline 'Ireland's National Education & Research Network'. At the top right is the 'FileSender 2' logo. Below the logo is a navigation bar with tabs for 'Upload', 'Guests', and 'My Transfers', and links for 'Help', 'About', 'Privacy', and 'Log-off'. The main content area is titled 'A Voucher allows someone to send you a file. To create a voucher, enter an email address then select Send Voucher. An email will be sent to the recipient with a link to use the Voucher.' Below this is a form with the following fields: 'From' (joe.bloggs.ie), 'To' (Mary@ext.ie), 'Subject (optional)', and 'Message (optional)'. To the right of the form is an 'Expiry date' field set to 29/12/2023, a 'Guest options' section with a checked 'Notify creation to guest' checkbox, and a 'Created transfers options' section with a link to 'Advanced settings'. A 'Send Voucher' button is located below the form. Below the form are two tables: 'Guests' and 'Guests transfers'. The 'Guests' table has columns for Guest, Subject, Message, Created, Expires, and Actions, and currently shows 'No guests'. The 'Guests transfers' table has columns for Transfer ID, Guest, Recipients, Size, Files, Downloads, Expires, and Actions, and currently shows 'No transfers' and 'No more records.'

“Voucher Sent” confirmation message shows on the screen.

Upload Guests My Transfers
Help About Privacy Log-off

A Voucher allows someone to send you a file.  
To create a voucher, enter an email address then select Send Voucher.  
An email will be sent to the recipient with a link to use the Voucher.

From :

To :

Subject (optional) :

Message (optional) :

Expiry date:

**Guest options**

Notify creation to guest

**Created transfers options**

Advanced settings

Notify me when expired

Notify me upon downloads

Send me a report when expired

User must login to FileSender to download file(s)

✔ Guest vouchers sent

**Guests**

Guest	Subject	Message	Created	Expires	Actions
	Guest Voucher		29/11/2023	29/12/2023	

**Guests transfers**

Transfer ID	Guest	Recipients	Size	Files	Downloads	Expires	Actions
No transfers							
No more records.							

The recipient of the voucher receives an email displaying the following message.

HF

HEAnet Filesender <filesender@heanet.ie>

HEAnet FileSender: Guest voucher received

To: mary@ext.ie

If there are problems with how this message is displayed, click here to view it in a web browser.

**STOP! Is this a phishing email? This email originated from an external source. Do not click links or open attachments unless you recognize the sender and know the content is safe.**

Hello,

Please find below a voucher which grants access to [HEAnet FileSender](#). You can use this voucher to upload one set of files and make it available for download to a group of people.

Voucher details	
Issuer	joe.bloggs@tus.ie
Voucher link	<a href="https://filesender2.heanet.ie/?s=upload&amp;vid=e8243d89-7541-409a-bd08-77d14c616283">https://filesender2.heanet.ie/?s=upload&amp;vid=e8243d89-7541-409a-bd08-77d14c616283</a>
Valid until	29/12/2023

Best regards,  
HEAnet FileSender

Translate this email: [https://filesender2.heanet.ie/?s=translate\\_email&token=9fd117f7-d5bb-49af-9fb5-7adc0579bf14](https://filesender2.heanet.ie/?s=translate_email&token=9fd117f7-d5bb-49af-9fb5-7adc0579bf14)

Clicking on the Voucher link brings the Voucher recipient to the HEAnet FileSender 2 email page where a FileSender 2 email can be written and a file uploaded.

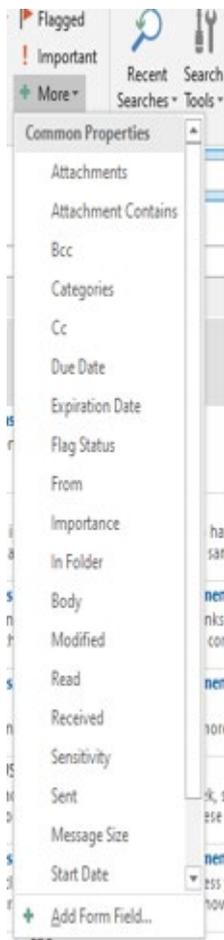
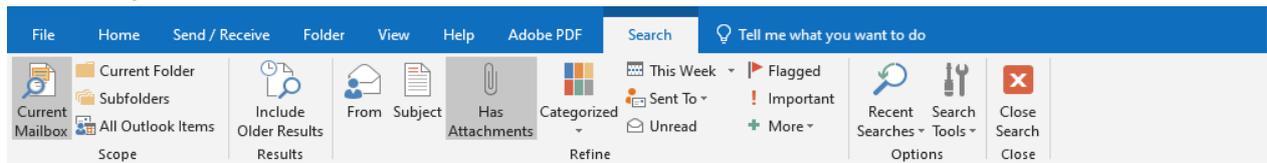
drag & drop your files here

<p>From : mary@ext.ie</p> <p>To : joe.bloggs@tus.ie</p> <p>Subject (optional) : <input type="text"/></p> <p>Message (optional) :</p> <div style="border: 1px solid black; padding: 2px; min-height: 30px;">Hi Joe, please find attached, my comments on the draft policy.  </div> <p><input checked="" type="checkbox"/> File Encryption</p> <p>Password : <input type="text"/></p> <p><input type="checkbox"/> Generate password</p> <p><input type="checkbox"/> Show / Hide Password</p> <p><small>⚠ File Encryption is end to end. Your files are encrypted in your web browser. It is up to you to send the encryption password to the recipient(s) as we do not store any passwords.</small></p> <p><small>⚠ File Encryption will significantly impact performance of your browser and/or device for the sender and receiver(s).</small></p> <p><small>⚠ Encrypted Files equal to or greater than 4GB may not be downloadable due to the limitations of the web browser.</small></p>	<p>Expiry date: <input type="text" value="29/12/2023"/></p> <p><a href="#">Advanced settings</a></p>
---	--

## OUTLOOK EMAIL SEARCH

1. Select the search bar, located above the Outlook ribbon.
2. Type a name, subject, or phrase which is included in the email message that you want to find. You can use quotation marks around a phrase to search on words in that exact order.

### Refine your search results



1. Select the search bar and type a name or subject.
2. Select an option to refine or widen your search: **All Mailboxes, Current Mailbox, Current Folder, Subfolder, or All Outlook Items.**
3. You can also select a category within the **Refine** group to further filter your search results:
  - **From** – only shows results from a specific person.
  - **Subject** - only shows results based on the subject.
  - **Has Attachment** – only shows emails that have attachments.
  - **Categorized** – only shows results that have a specific category assigned to them.
  - **Sent To** – searches messages **Sent to You, Not Sent Directly to You, or Sent to Another Recipient.**
  - **Unread** – only shows unread messages.
  - **Flagged** - only shows messages flagged by you.
  - **Important** - only shows emails marked as Important.
  - **More** - filters your results based on more advanced criteria, such as **Cc** or **Sensitivity**.
4. Select **Recent Searches** to run recent searches again.

**Note:** Outlook saves only the recent search query, not the results.
5. Select **Close Search** to close the **Search** tab.

## GENERAL GUIDANCE ON EMAILS

1. Keep it simple. E-mails should be focused and free of unnecessary information – especially personal information. Lists, bullet points, and short sentences will make your message easy to read and understand and reduce the risk of misinterpretation in the future. It is an electronic business letter.
2. Just saying. Check how you word your email especially if you are referring to another person or a sensitive situation. Write from the point of view that the subject of the email is standing over your shoulder *scrutinising* it – because someday they might be!
3. Proofread. Always look over your e-mails for errors. One word can change the whole meaning of a sentence. Reading it out (even in a whisper) can help to address any issues.
4. Respond or react? If you're upset about something, take a moment and wait before sending an e-mail. A piece of your mind could lead to no peace of mind. Before sending an email consider what you want to say, what you need to say, and what you should say! It could potentially end up being read in a very different context under a data access request.
5. Reply all. Only use this when the email applies to all.
6. Multiple recipients. When sending a circular email to multiple recipients, group emails (e.g, all staff or all students); external recipients, use the Bcc field with your own or a relevant generic email in the 'To' field.
7. Forwarding email. Before you forward an email check all the previous content to make sure that it is all relevant. Delete anything that isn't.
8. Recipients and attachments. Make sure you are sending your message to the correct email address and **you** have attached the correct documents. Use the email Mail-Merge option in MS Word where possible. Always check the body of the text when doing this to ensure that you don't have any non-essential data. Send a test email to yourself if necessary.
9. Double check the names: Check the names of the people you are sending it to – twice. Where sending personal data please ensure that you use a password or send via HEAnet Filesender or an alternative but secure method.
10. Subject Line. Use the subject line to clearly identify the email so that it can be easily retrieved. Don't put personal information in a subject line. It's the first thing recipients see and the last thing senders change.

## EMAIL RETENTION GUIDELINES

### WHAT TO KEEP

1. Decisions with a short-term result
2. Decisions with a long-term result
3. Emails of a litigious nature
4. Advice to students/staff/clients forming part of an ongoing query
5. Advice to students/staff/clients forming part of a short-term query

## HOW LONG

1. Until the result has been finalised and outcome established
2. Until the result has been finalised and outcome established
3. File until the statutory notice has passed
4. Retain until query has been resolved and a final decision made (file only if necessary)
5. Retain until query has been resolved and a final decision made (file only if necessary)

Create a separate 'Keep' folder for retained emails and check regularly.

## WHAT TO DELETE

1. Duplicate emails (retain most up to date with relevant email trail)
2. No further action required, advice not forming part of an ongoing issue
3. Spam or Malicious Content – Delete, or Report as appropriate
4. Un-subscribe from un-necessary circulars
5. Use your personal account for all personal correspondence or move personal items to a personal folder/email account
6. Delete from inbox, sent items, and deleted items folders

**Here's the difficult one:** Dedicate a specific time on your work schedule to organise email or get in to the habit of identifying retention as you go – or both!

## ADVICE FROM CSD ON DEALING WITH SPAM or SUSPICIOUS EMAILS.

- Don't trust the display name or email address - CHECK
- Look but don't click... hover on links first and check the address
- Spelling mistakes and grammar are common in spam / phishing emails
- Analyse the greeting and signature
- DON'T give out personal information
- Urgent or threatening language as a subject
- Never click on attachments
- Approach every unsolicited email with doubt

## ADVICE ON PERSONAL CORRESPONDENCE.

1. It is recommended that you don't use work email address for personal emails and that you don't store personal files on your work PC, however, since most of us spend the biggest part of our time in work, not having personal files is almost impossible.
2. Be sure to download and delete them regularly or, before you move or change PC, move to another post, or retire!
3. The places to check for personal details are: Email folders (Inbox, Sent, Deleted, other folders you may have designated as Private/Personal); X-Drive; One Drive; PC.
4. When required to search your emails for a subject access request or FOI request, follow the guideline on how to search emails.

## CHECKLIST BEFORE SENDING

1. Check the recipient names
  - a. Is everyone who needs to be, included
  - b. Is there anyone who may not need to be copied
2. Check the email content for:
  - a. Accuracy
  - b. Clearly conveying the message
    - i. Can it be read differently?
    - ii. Should it be said differently?
  - c. Un-necessary personal data, opinions, or comments.
  - d. Any previous content which is either not relevant, or doesn't need to be included.
3. Attachments – what should be attached – double check the attachment before sending
4. Subject line
  - a. Keep this relevant
  - b. Do not put personal data in this section if it can be avoided
5. Security – will there be a breach of personal data if someone else gets the email.
  - a. If yes, then use one of the more secure methods of data sharing

## ACCESS TO EMAIL ACCOUNTS FOR LEAVERS OR SEASONAL STAFF

Retirees have access to email for six months after they finish.

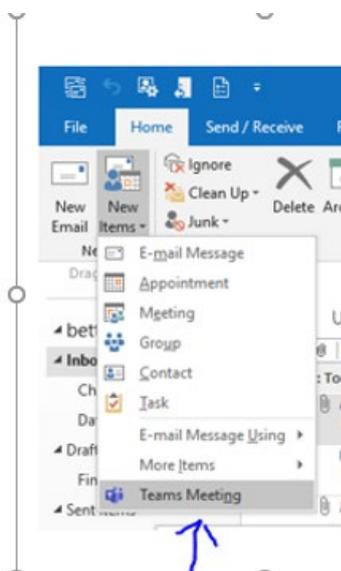
Leavers have access removed immediately

Continuing Staff have their account paused/inactive when not employed.

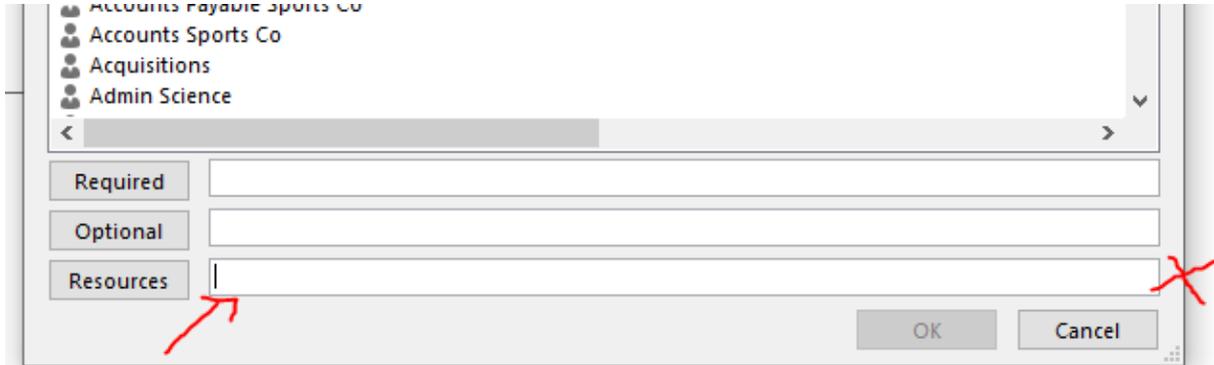
## HOW TO HIDE MEETING REQUEST RECIPIENTS – TEAMS

### MEETING REQUEST FROM OUTLOOK – DESKTOP VERSION

1. On your outlook screen go to New Items and select Teams Meeting.

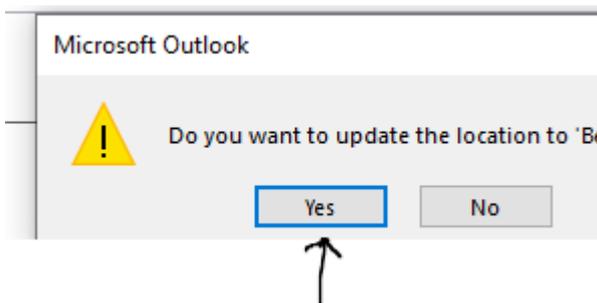


2. Click on the 'To' Field and Use the 'Resources' field to input participant email addresses:

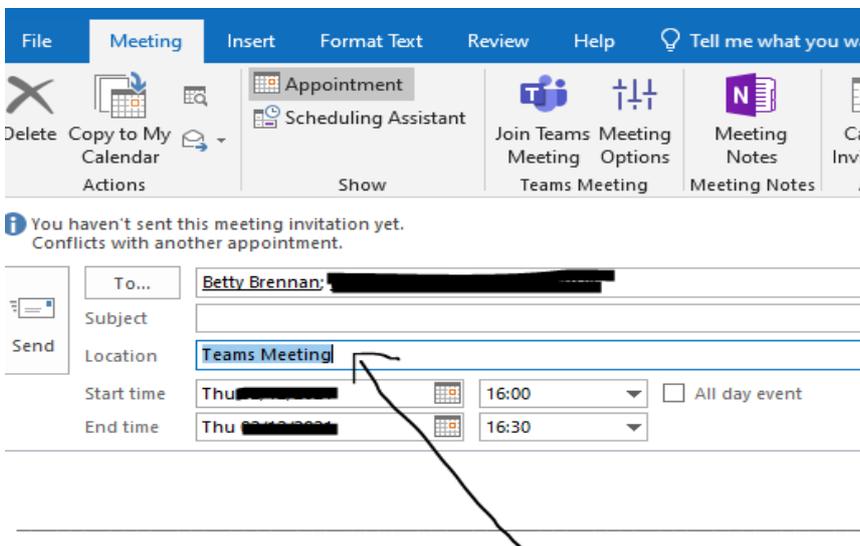


Click OK.

3. Click 'Yes' to update location option. This will populate the To, and Location fields with the email addresses.



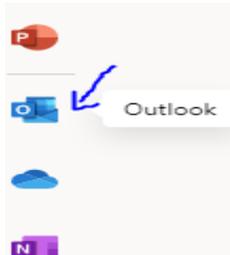
4. Delete existing information **from Location field** and make sure you either type something else in or use the spacebar to create blank characters (**this field must be populated with something or the names will not be hidden**).



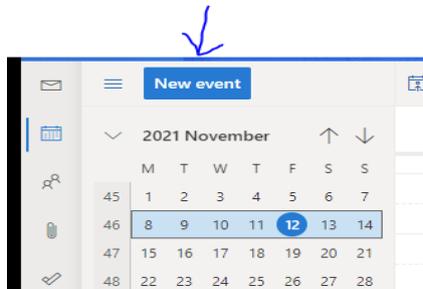
7. Populate the subject field and message information and Send.

### MEETING REQUEST FROM OUTLOOK (OFFICE 365)

1. Go to your OneDrive Outlook App.

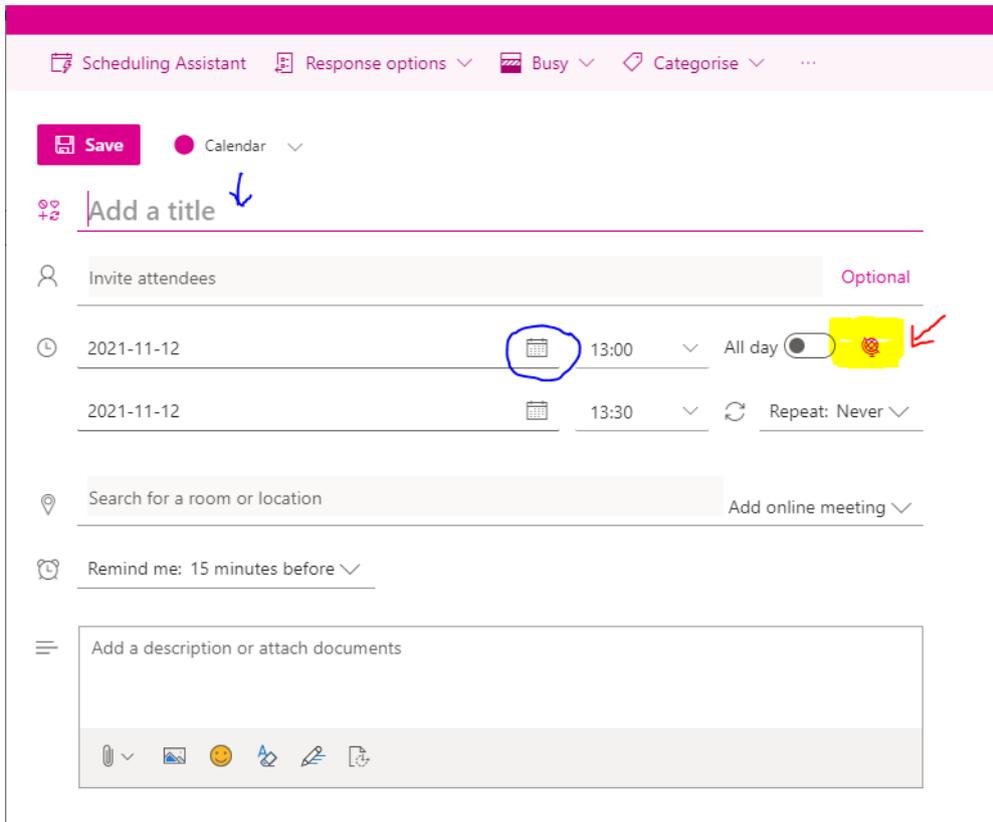


2. Go to Calendar and select New Event

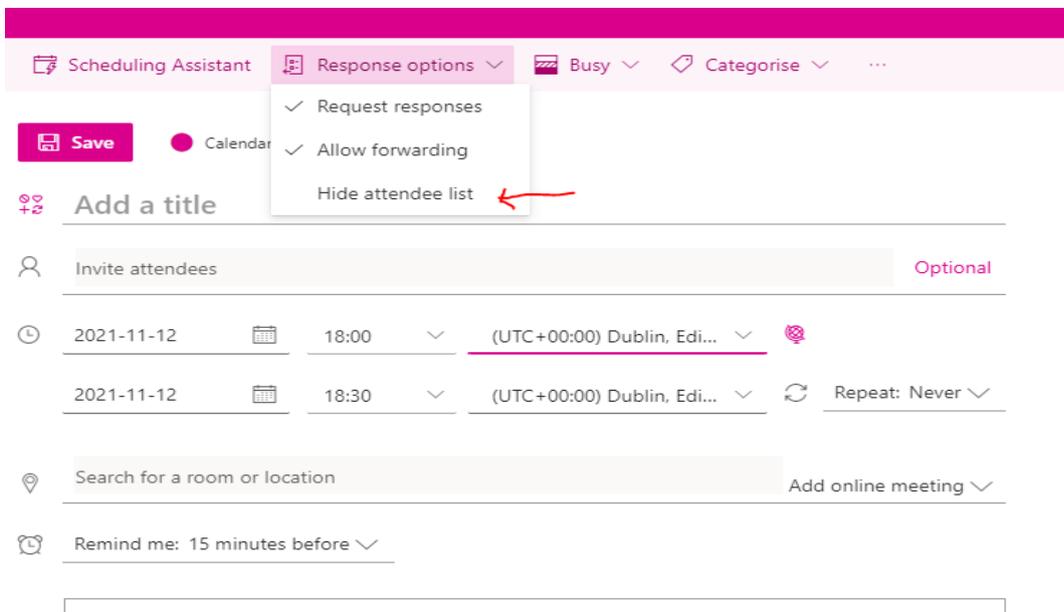


3. Input the Meeting Details

- Title, Attendees, Body of Text, etc.
- Date and Time – NOTE – Select correct time zone (yellow highlight)
  - (UTC+00:00) Dublin, Edinburgh, Lisbon, London



Go to Response Options and select 'Hide Attendee List'



To make this an Online Meeting – Select the *Add online meeting* dropdown.  
Send.

 **Add a title**

---

 Invite attendees Optional

---

 2021-11-12  18:00  (UTC+00:00) Dublin, Edi... 

2021-11-12  18:30  (UTC+00:00) Dublin, Edi...  Repeat: Never 

---

 Search for a room or location Add online meeting 

-  Skype meeting
-  Teams meeting

---

 Remind me: 15 minutes before 

---

 Add a description or attach documents