FILE SHARING BEST PRACTICES: G SUITE

##### MARCH 2021

## Scope

This document will cover file sharing best practices for Mercy Corps team members using G Suite apps, particularly Gmail and Google My Drive. To simplify this document, only individual file sharing is referenced below, but the same options are available when sharing a My Drive folder.

This document will **not** cover file sharing in Google’s shared drives, nor external file sharing platforms. To learn more, visit Google’s [My Drive versus shared drives](https://support.google.com/a/users/answer/9310352?hl=en) or [managing shared drives](https://support.google.com/a/topic/7337266?hl=en&ref_topic=2490075) page.

Note: Mercy Corps will transition to Microsoft 365 for file sharing in late 2021. At that time, a similar document or resource will be created that discusses best practices particular to that platform.

**Getting started**Before you share a file, make sure to answer these questions:

* **Content**: What type of material or file needs to be shared? Does the file contain raw or aggregated data, and/or include [personally identifiable information (PII)](https://library.mercycorps.org/search?ln=en&as=1&m1=e&p1=Responsible+Data+Program+Team&f1=author&op1=a&m2=a&p2=definition&f2=&op2=a&m3=a&p3=&f3=&dt=&d1d=&d1m=&d1y=&d2d=&d2m=&d2y=&rm=&ln=en&action_search=Search&sf=title&so=a&rg=25&fti=0&fti=0)? Do you own the content or did it come from another source? Is this content subject to the [Record Retention](https://library.mercycorps.org/record/14301?ln=en) or [Responsible Data](https://library.mercycorps.org/record/30303?ln=en) policies?
* **Audience**: Is this meant for a specific team, country, the entire agency, or the public? Will your content be actively edited by multiple parties or need multiple versions over time? Should there be different permission levels based on who is accessing the file?
* **Security**: Could this content be considered confidential or proprietary, and therefore risky or concerning in the wrong hands? Is this content subject to legal action if not handled properly, such as personally identifiable information? Note: if you are unable to answer these questions, please seek assistance from your supervisor, team lead, Legal or the [Responsible Data team](mailto:dataprotection@mercycorps.org).
* **Time**: How long do people need access to this content?

### Best practices

Based on your answers to the questions above, there are different best practices to keep in mind.

* **Identify who needs access, and only give access to them**
  + When you share a file in My Drive, the default setting is ***Restricted*** (to persons or groups), and that is the best practice.
    - Only share files with those who should need access, whether they are inside or outside Mercy Corps. Consider who will or may need to use your file, and grant access accordingly. If in doubt, check with your supervisor, team lead or member of the SMT.
    - Confidential, private or [personally identifiable information (PII)](https://library.mercycorps.org/search?ln=en&as=1&m1=e&p1=Responsible+Data+Program+Team&f1=author&op1=a&m2=a&p2=definition&f2=&op2=a&m3=a&p3=&f3=&dt=&d1d=&d1m=&d1y=&d2d=&d2m=&d2y=&rm=&ln=en&action_search=Search&sf=title&so=a&rg=25&fti=0&fti=0) content should always have restricted access. Note: if you are unable to determine if or how the content should be restricted, please seek assistance from Legal or the [Responsible Data team](mailto:dataprotection@mercycorps.org).
  + If a document is truly useful and appropriate for everyone at Mercy Corps, only then should you choose the ***Change to Mercy Corps*** option under sharing settings.
  + The ***Anyone with the link*** option should only be used for files that hold no confidential information, and are open to the public. If the ***Anyone with the link*** setting was used on a file with confidential private, personal or financial data, it could put Mercy Corps at immediate legal risk, and make it easy for bad actors to use that information for criminal purposes.
  + The best way to control access to files is to create a [Google group](https://support.google.com/groups/?hl=en#topic=9216) and assign permissions to those in the group. Google groups are not just for sending emails; groups are powerful and convenient tools for managing folder and file permissions.
* **Identify and apply the appropriate level of editing permissions** 
  + Example: a new project charter needs to be created. It’s likely only the team responsible for charter creation should have ***Editor*** access.
  + When it’s time to get feedback from others, grant ***Viewer*** or ***Commenter*** permission to those individuals, based on the level of interaction you expect or need.
  + To learn more about access levels, visit [Share and collaborate in My Drive](https://support.google.com/a/users/answer/9310248?hl=en). You can also restrict the ability for others to download a file, or share it with others. To learn more, visit [Restrict sharing options on Drive](https://support.google.com/a/users/answer/9308868?hl=en).
* **Identify risks and secure accordingly** 
  + ***Active collaboration should happen in Drive.*** If your content will be actively edited or have multiple versions over time, the best place for your file is usually Google Drive. If your content will contain sensitive information, this should be stored on Mercy Corps secure servers, when this option is available. By contrast, finished documents that are intended for use outside your team should live in the Digital Library. To learn more, see [Digital Library Submissions](https://library.mercycorps.org/pages/?page=Submission%20Guidelines&ln=en).
    - File versions can be maintained in Drive, and depending on the file type, multiple people can edit a document at the same time.
    - It’s impossible to have real-time collaboration if a file only lives on someone’s computer or a local server, and version control can be impossible to manage.
    - If active collaboration is beneficial during the document management process, start by creating the document in Google Docs, Sheets or similar. This will ensure the best file continuity and collaboration features. However, if there are critical features only available in Word or Excel, create in those applications instead. Note: there are version control risks when switching between Word and Docs versions of files, so pick one application and stick with it til the document is complete.
    - If your project requires the use of applications outside of G Suite, encourage your team to download [Google Drive for desktop](https://support.google.com/drive/answer/7329379?hl=en). This program allows you to view any documents in My Drive or Shared drives as if they were on your laptop, even when offline, and without having to download the item or convert it to a Google format.
  + ***Send links, not attachments.*** When you directly attach a file to an email, it’s easy for file versions to multiply. Instead, upload files to your My Drive, copy the file link, and use the link in your email.
    - Before sending the link, make sure to check or adjust the permission settings. Gmail will also prompt you, as needed, to adjust permissions before sending.
    - If you share a file directly from Google drive, by default you will have no record of this in your email. If you need to track who you have shared a file with, when you shared it and what actions you need the recipient to take, then you have two options:
      * Copy the link. Start an email with details on next steps, and paste the file link into the email.
      * Open the file, and from the menu, choose ***File > Email this file*** or ***Email collaborators***. From there you will have an option to check the box for ***Send yourself a copy***. If checked, you will receive a copy of the same email as your recipients.
  + ***Permissions change over time*** 
    - If you are only working with someone for a short period of time or with people outside Mercy Corps, consider giving temporary permissions, by adding an expiration date to their access. If you forget to remove the access later, an expiration date will ensure their access is suspended at the right time. See the example below, to learn how to add an expiration date.
    - You may also want to consider restricting whether people have the ability to edit permissions on the file, or be able to download, print or copy the file. Instructions about this are below.
    - It is a best practice to periodically audit the list of who has access to your files, folders or Shared drives. A regular review of file/folder permissions will ensure you remove access for team members who have changed roles, or are no longer with Mercy Corps.
  + ***Inherently risky content requires extra steps***
    - If your content includes personally identifiable information (PII), demographically identifiable information (DII) or other types of [personal data](https://library.mercycorps.org/search?ln=en&as=1&m1=a&p1=Responsible+Data+definitions&f1=title&op1=a&m2=a&p2=&f2=&op2=a&m3=a&p3=&f3=&dt=&d1d=&d1m=&d1y=&d2d=&d2m=&d2y=&rm=&ln=en&action_search=Search&sf=title&so=a&rg=25&fti=0&fti=0), then the content is protected under multiple data protection laws. Before you share personal data, verify the legal requirements for sharing that information with others. Inappropriate personal data sharing can put program participants, donors, partners and Mercy Corps team members at risk. If you have questions about personal data or data protection laws, please email the Responsible Data team at [dataprotection@mercycorps.org](mailto:dataprotection@mercycorps.org), or if you have MCE-specific concerns, email [mce-dataprotection@mercycorps.org](mailto:mce-dataprotection@mercycorps.org).
    - If the information is considered confidential or proprietary for business purposes, take care to only share it with required parties & consider granting temporary access.   
        
      Note: **Do not place confidential files inside folders that are shared widely.** Shared folders permissions trickle down to each file and subfolder, so your confidential file could be accessed by anyone with permission to the parent folder. Instead, move your confidential file to a new location, outside the larger shared folder structure.
    - Consider password protection or encryption for the file or folder, if the recipient is in an insecure location, or if the contents include personal data. If protecting the file with a password, be sure to send the password separately from the file. If encrypting the file or folder, a simple, free option is to [zip files or folders using 7-Zip](https://www.7-zip.org/). Zipped files can be saved in Google Drive.
* **Additional access requests**
  + If you have a restricted file, and someone with access shares the link with another person, that person will not automatically have access to that content in Google Drive. Instead, they’ll see a web page with the opportunity to request access. The request for access will go to the file owner.
    - Access requests should be reviewed, and those receiving access requests should not simply grant permission to any and all requests, without reviewing the above notes and considerations.
    - Do not blindly share links with others. Check file permissions before sharing, and if you think others need access, contact the file owner.
  + Use caution in granting access requests to team members who may accidentally be using their personal email accounts. Instead of granting access to a personal email account, ask the team member to log into Google using their Mercy Corps account.

Finally, a warning about copying and/or moving a file that’s been shared with you. Once a file has been shared, you may have the option to ***Make a Copy*** and/or ***Move*** the file to another location. **Never move a file without the owner’s permission.**

* If you need to see the file in your My Drive or in a secondary location, the best practice is to use the ***Add shortcut to Drive*** option.
* If a file copy is made, or the file is moved, be aware it will not have the same permissions as the original file unless you explicitly set those permissions.

### Sharing is caring

Here is a step-by-step fictional example of sharing a file, using best practices noted above.

Imagine that Mercy Corps is working with a consultant (PNW Rocks), to create materials for a major new initiative at Mercy Corps, code-named Big Cheese. The Big Cheese project will not be announced publicly until July 2021. It is time to collaborate on next steps for the project, in a file called Big Cheese Plans.

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| --- | --- |
| 1. Upload the file to My Drive. |  |
| 2. To share the file, right-click it and then click **Share.** |  |
| 3. Enter the email address address for the person you want to share with, then   * Choose the **level of access**. Google defaults to Editor access, but you can also choose Viewer or Commenter, if contributions should be limited. * Best practice is to notify the person, and add a message, explaining why you’ve shared the file. To notify, leave that box checked. When done with changes, click **Send**. * Another option is to uncheck this box, and send a separate email with the link. To notify separately via email, uncheck the *Notify people* box. After clicking **Done**, right click the file and choose **Get Link.** In the new popup window, click the **Copy link** button, and paste it into your email. |  |
| 4. Once permission has been granted, the sharing time period can be shortened. To limit access, right click the file again, and click **Share**.  5. Find the email address you just shared with, and right click the access level. You will see new options appear, so click on **Give temporary access**.  6. A calendar will appear. Navigate to the month when access should expire, and click the corresponding date.  7. The calendar will disappear, and the display date will change. Once you can see that access will expire on the correct date, click **Save**.  8. Finally, if you have concerns about others taking inappropriate actions with the content, there are additional options from the settings screen. File settings can be accessed from the gear icon in the upper right of the sharing window.  Click the gear and you’ll see options to restrict further sharing, or disabling the option to download, print or copy. For any feature you want to disable, simply uncheck the box. The file will quickly update, saving the new setting. | (gear icon) |

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possible. In disaster, in hardship, in more than   
40 countries around the world, we partner to put   
bold solutions into action — helping people triumph   
over adversity and build stronger communities   
from within. Now, and for the future.



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