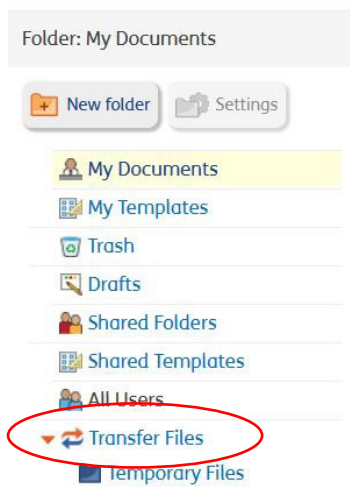




How to Share Documents Across an MSA

It is possible to share documents with other accounts within the MSA, via a “Transfer Files” folder. This folder is potentially available to all logins/accounts across the MSA (depending on the permissions set by account Admins). Individuals can copy their own document into this area, so that it can be saved and edited by other users. This can be useful for sharing standardised templates/resources. For example, a Trust may have an agreed format for display materials. This should NOT be used for sensitive/personal data or include photographs of children or staff.

How to Add a Document to Transfer Files

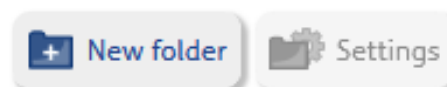


The Transfer Files Folder can be seen below the shared folders on the account home page. Those with the correct permissions can copy documents here and create sub-folders (it is good practice to create a folder to make navigation easier). Those permissions are set by the account Admin.

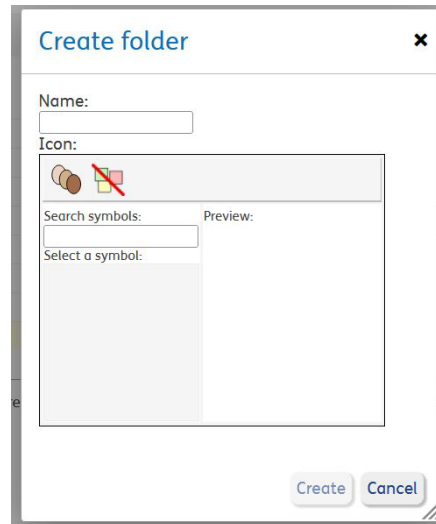
1. To create a new folder click to select **Transfer Files**.



2. Click the **New Folder** button.



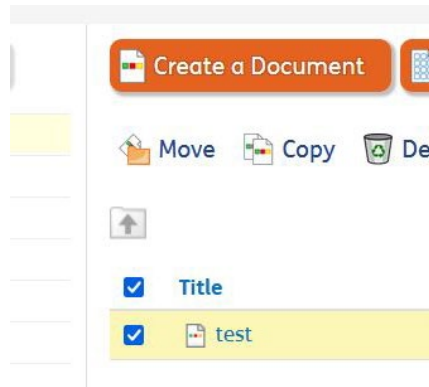
3. Create a filename and click **Create** to save.



4. The subfolders can be seen here. You are now ready to add your document.



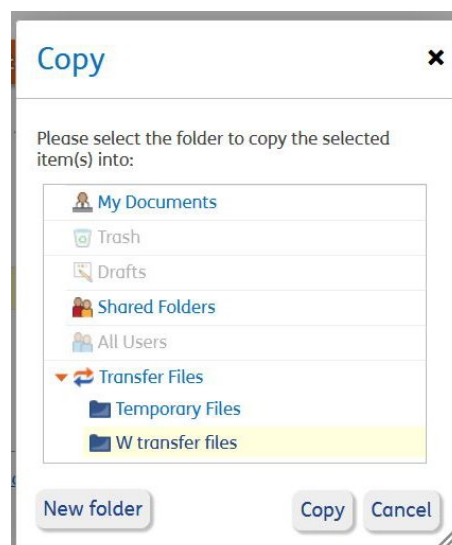
5. Find the original document saved in **My Documents**, and **tick** to select.



6. Click **Copy**.



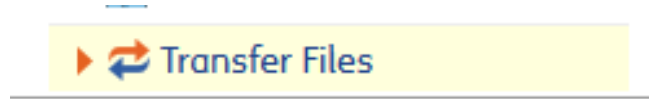
7. In the pop-up menu **click** to select the folder and then click the copy button (you can also create a new folder at this stage). A *copy* of your original document can now be found by other users and copied to their folders. This will not alter the original document.



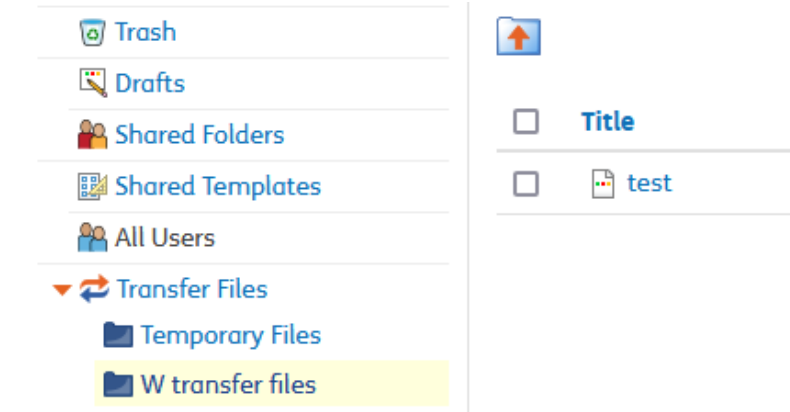
How to Open and Use a Document in Transfer Files

If colleagues have saved documents, it is possible to take a copy for your own use.

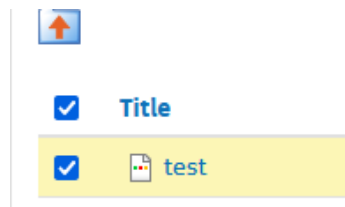
1. Click to select the **Transfer Files** section.



2. Select the sub-folder you require.



3. Tick to select the document(s) you need.



4. Click Copy.



5. Choose where you wish to save your copy of the document and click the **Copy** button. The document will now be saved to your personal documents, where you can edit without affecting the original file.

