

# File Sharing

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## Introduction

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Sierra Chart supports sharing a [Chartbook](#), [Study Collection](#), or [Spreadsheet](#) file with any other Sierra Chart user or users, or even to yourself to transfer files to other installations of Sierra Chart that you have.

It is also supported to share the global configuration used by a Sierra Chart instance with another user or to other installations of Sierra Chart.

## Instructions

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1. Select **File >> Send File to User**.
2. Enter the **Sierra Chart Username/Account Name** of the user that you want to send the Chartbook to in the **Sierra Chart Username/Account Name** box. You can find out what their Account Name is by asking them to select **Help >> About** in their instance of Sierra Chart. What they see displayed there for the **Account Name** is what you need to use.
3. Press the **Select File** button.
4. Select the Chartbook, Study Collection, or Spreadsheet file to send.
5. Multiple files can be selected.
6. Press the **Open** button.
7. Alternatively, if you want to send the global configuration which includes the settings set through the **Global Settings** menu but not including Service Settings for Data/Trading services or your Sierra Chart Account Name and Password, then enable the **Send Global Configuration** option. In this case other files will not be sent.
8. Press the **Send** button.
9. Once the Chartbook or other file is uploaded to the server you will see the following in the [Message Log](#):

**File to be sent to user successfully uploaded. | [Date Time]**
10. If this is the first time you are sending a Chartbook or other file to a particular user, the user will be notified about this by email and also through the System Notification Message window in Sierra Chart.
11. The user can accept the file from you, delete it, or ignore it.
12. If the user chooses to accept files from you, then they will automatically receive the Chartbooks, Study Collections, or Spreadsheets that you shared. This process can take about two minutes for them to receive the file. They will receive a notification message

in their running installation of Sierra Chart and also receive an email message.

The user may need to [translate the symbols to the current service](#) in the received Chartbook if you are using a different Data or Trading service as compared to the user you are sending the files to.

13. If a file is shared with a user, and that user has another file with the exact same name and extension within their [Sierra Chart Data Files Folder](#), then the shared file will not be downloaded.

The solution to overcome this, if you want to have that file downloaded again because it may be newer and have some changes, is for the user first to delete the file to be shared.

This can be done through **File >> Open Chartbook** or **File >> Open Spreadsheet**. Select the file in the file list and press the **Delete** button. Press the **Cancel** button to close the **Open Chartbook/Spreadsheet** window.

To delete a Study Collection, refer to [Delete a Study Collection](#).

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