samegoal

Bulk Update Collaborators

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Previously when sharing a document users had to select either collaborators or owners from the **Share** dropdown menu. The two options have now been combined. Going forward, users may now update both collaborators and owners from the **Update Collaborators** link in the **Share** dropdown menu. In conjunction with filtering options, this allows for faster sharing and transferring of documents.

Recommended filtering options available on all list pages:

- **Student ID Filter** - Users can type in a comma separated list of student ID numbers to view only the students they wish to update. Learn more.
- **Date Range Filter** - Admin users can view a specific date range (e.g. the previous school year) when transferring documents. Learn more.
- **Form Filter** - Users can type to search for forms, and select multiple forms at once. For example, users may visit Caseload (left menu), select only IEP, ETR, and Progress Reports, then share or transfer only those documents in bulk quickly and easily. Learn more.

A recommended workflow is to use the filtering options to select documents that need "Can Edit" ,"Can View", or "Remove" access > click the **Share** dropdown menu > select **Update Collaborators** > search and add all collaborators. Once the collaborators have been added, filter the form types for any "Is Owner" access that need to be transferred, and follow the same steps for collaborators transferring the owners instead of updating the collaborators.