samegoal

Document Access Requests

Document owners can share documents with other users. If a user does not have explicit access to a document but their user role will allow them to have access if the document is shared with them, they can request access.

When a user requests access, the owner(s) of the document will receive a notification. When they click on the notification, it will allow them to review the request and modify the user's document access for the requested documents.

- Request access from within a document
- Request access to multiple documents at once
- Request access to documents you cannot currently view
- Approve or deny a document access request
- Grant a different level of access

Request access from within a document

If you have at least **Can View** access to a document, you may request a higher level of access while viewing the document.

Steps *To request access from within a document:*

1. While in the document, click on **Share** in the top right corner.
2. In the **Collaborative Team** dialog, click **Request Document Access Change**.
3. In the **Request Document Access Change** dialog, select which permission level you would like to request for the document.
4. Click **Send Request**.

Once the request has been sent, the document owner(s) will receive a notification to review your request and either approve or deny it.

Request access to multiple documents at once

You can bulk request access to documents that you have at least **Can View** access to from document list pages (e.g. **Caseload**, **All**, a student's **Documents** tab).

Steps *To bulk request access:*

1. Navigate to a document list page.
2. Search for the documents you would like to request access to. Use the filters as needed.
3. Once you have selected the documents, click **Share** > **Request Document Access**.
4. In the **Request Document Access Change** dialog, select which permission level you would like to request for the documents.
5. Click **Send Request**.

Once the request has been sent, the document owner(s) will receive a notification to review your request and either approve/deny it, or grant a different level of access.

Request access to documents you cannot currently view

In some cases, users may want to request document access to documents they cannot currently view. In this case, they may not even know whether the desired documents exist.

To request access to documents you cannot view, you can request access on a per-student basis for specific form types. This can be done from the **Students / create new** page.

Steps *To request access from Students / create new:*

1. While on the **Students / create new** page, search for the students you would like to request document access for. Use the filters as needed.
2. Once you have selected the students, click on **Actions** > **Request Document Access**.
3. In the **Request Document Access** dialog, select which forms you would like to request access to.
4. Then select which permission level you would like to request for the documents.
5. Click **Send Request**.

Once the request is sent, if there are currently effective documents of the given form type for the selected students, the document owner(s) will receive a notification to review your request and either approve/deny it, or grant a different level of access.

Tip If there are multiple documents owned by different users, multiple notifications will be sent. Each document owner will receive a notification for their document(s).

Approve or deny a document access request

If a user requests access to one or more of the documents you own, you will receive a notification depending on how you've configured your notification preferences.

You can click on the notification (or notification link) to review the request. While reviewing the request, you will need to make a decision about whether you approve or deny the request on a per-document basis.

Steps *To approve or deny a document access request:*

1. Once you've followed the document access request notification, you will be able to view the list of documents.
2. If more than 50 documents have been requested, 50 documents will appear on the page at a time and you may use the arrows in the top right to navigate through the list of documents.
3. To approve all requested documents, click **Approve ## documents**.
4. To deny all requested documents, click **Ignore All**.
5. To approve some of the requested documents, you may do any or all of the following:
    - Click **Stop selecting all items** at the top
    - Use filters as desired
    - Select and deselect documents
    - If you would like to approve the selected documents on a page, click **Approve ## documents** to grant access and be taken to the next page of 50 documents.

After you have gone through each page of documents or once you click **Ignore all**, the request page will close and your notification will disappear.

Tip If you select **Ignore all** after approving a set of the documents, access will be granted for the approved documents and ignored for the remaining documents.

Tip If you navigate away from the request page before approving or ignoring all documents, you may return to the request page by clicking on the original notification.

Tip If your district is on the PRO edition of SameGoal, you may receive document access requests that were automatically generated by the system. This can happen if a

user is added to the student team for a student and they are required to acknowledge receipt of one or more current documents you own but do not have access.

Grant a different level of access

When you receive a document access request for documents you own, the request will be for a specific permission level (**Can View**, **Can Edit**, **Owner**). If you would like to grant a different permission level for some or all of the requested documents, you may do so.

Steps *To grant a different level of access:*

1. While reviewing a document access request, select only the documents you would like to grant a different level of access for.
    - You may use filters and select/deselect documents as needed.
2. Click on **Share** > **Update Collaborators**.
3. While on the **Update Collaborators** dialog, set the user permissions to the desired level.
4. Click **OK**.
5. If there is more than one page of documents on the request page, when you save your changes, the access will be granted and you will be taken to the next page of requested documents where you will be able to approve/deny the request or grant a different permission level again.