samegoal

Share Documents

One of the first things many people do after creating a document is share it with other team members. Each document can be shared with an unlimited number of collaborators by adding them directly to the collaborative team for a document.

Additionally, users may have "default" access to documents if an administrative user configures their user role to grant "default" access to specific form types. This means users can access documents even if the documents haven't been explicitly shared with them.

- Document permissions
- Add/remove collaborators
- Transfer document ownership
- Add/remove collaborators in bulk
- Share documents after losing access
- Acknowledgement of Receipt

Document permissions

When sharing documents with other users, you can specify which level of access to grant them:

- **None/Remove**:
  - No access
  - Removes the user from the document
- **Can View**:
  - View documents as read-only
  - View document history
  - Acknowledge documents (available with the PRO edition of SameGoal)
- **Can Edit**:
  - View documents
  - Make changes to document fields

    - Sign electronically
    - Translate documents (available with the PRO edition of SameGoal)
    - Add/remove attachments
- **Is Owner**:
    - Create new documents (the user who creates a document automatically becomes the owner)
    - View/edit documents
    - Add/remove collaborators
    - Delete translations
    - Complete, amend, delete, and undelete documents

Add/remove collaborators

Steps *To add or remove collaborators for a given document:*

1. Visit the document you wish to add or remove collaborators for.
2. Click on **Share** in the top right corner.
3. To add a collaborator, search for the staff member under **Add User**, then click their name. The user will pop into the left column of the screen, under **Collaborative Team**.
4. Adjust permissions as needed.
5. To remove a collaborator, find their name under **Collaborative Team**. Change the dropdown next to their name to **Remove**.
6. Click the **OK** button.

When you share a document with another user, they will receive a **Document Share** notification, the document will be added to their caseload automatically, and will appear at the top of their Recent page. When you remove a user from a document, the document is removed from their caseload automatically.

Tip If you remove your own access to a document, you will need to re-request access from the owner later if necessary.

Tip If your search for a collaborator returns no results, check your spelling or try searching for their partial name.

Tip If your district uses the PLUS or PRO edition of SameGoal, you can also share documents with parents/guardians.

Transfer document ownership

Transferring documents (changing the **Owner** on a document) is particularly useful at the start and end of a school year. During this time, students are often assigned new caseload managers. These caseload managers need access to previously written documents.

Steps *To transfer document ownership:*

1. Navigate to the **Update Collaborators** tab the same way you would when sharing a document.
2. To add a new user, search for the staff member under **Add User** and click their name to add them to the **Collaborative Team**.
3. Change the permissions for whomever should be the new owner to **Owner**.
4. Optionally, change your own permissions to something other than **Owner**.
5. Click **OK**.

Tip When transferring ownership, you can also **Remove** yourself if you would like to be taken off as a collaborator. This will automatically remove the document from your caseload.

Tip If you would like to stay on as a collaborator, but remove the student from your caseload, you can unstar the documents after you have transferred them to the new owner.

Tip Document owners who have lost implicit access to a document are still able to share the document to transfer ownership to a different users.

Add/remove collaborators in bulk

In order to help save time, you can bulk share up to 50 documents at once. This includes add/removing collaborators in bulk, as well as transferring ownership in bulk.

Share documents after losing access

In some cases, document owners may lose access to the documents they own. This can happen when:

- The student the document is associated with moves to a new building where the document owner does not have permissions.
- The document owner's user role was updated and no longer grants **Is Owner** permission to documents of the given form type.

When a user loses document access but was previously the explicit owner of a document, they will still be able to share the document in order to transfer ownership to someone else. This way, documents will not get stuck without an owner who can update the collaborative team.

If the user has lost all access to a document, when they click on the document from a list page, they will not enter the document, but rather they will receive a **Collaboration** dialog that will allow them to update the collaborative team.

Tip At the beginning of the year, it may be helpful to transfer ownership of documents for students who have left your building. To do this, on a document list page, use the **Buildings** filter to search for documents in buildings where you do not work. Additionally, use the **Documents** filter to search for documents you are the owner of.

Acknowledgement of receipt

If your district is on the PRO edition of SameGoal, you have access to the acknowledgement of receipt feature and collaborative team members' acknowledgement status will be displayed in the **Update Collaborators** activity.

Student team members will automatically be set as required acknowledgers for form types that are configured to require acknowledgement. The acknowledgement status cannot be changed for these users.

However, the acknowledgement status can be updated if the form type does not require acknowledgement or if the user is not a student team member.