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 with **explicitly** by adding them directly to the document, or **implicitly** using user roles set by an administrator.

- Document permissions
- Add/remove collaborators
- Add/remove collaborators in bulk

Document permissions

- **Is Owner**
  - Create new documents (the user who creates a document becomes the owner)
  - Add/remove collaborators
  - Complete, amend, delete and undelete documents
  - Edit documents
  - Add/remove attachments
- **Can Edit**
  - Edit documents
  - Add/remove attachments
- **Can View** - View documents only.
- **None/Remove**. No access/remove the user from the document.

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 the **Share** tab.
3. To add a collaborator, search for the staff member under **Add Collaborator**, then click their name. The user will pop into the left column of the screen, under **Collaborative Team**. Adjust their permission as needed.
4. To remove a collaborator, find their name under **Collaborative Team**. Change the dropdown next to their name to **Remove**.
5. Click the **Save** button.

When you share a document with another user, they will receive a **Document Share** notification.

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.

Add/remove collaborators in bulk

Steps *To add or remove collaborators for multiple documents:*

1. Navigate to caseload, all, or a student's page according to your needs
2. Use filters in the blue bar to search for documents that you wish to add or remove collaborators to.
3. Check the documents you wish to transfer. To check all documents, use the checkbox button on the top left of the pane.
4. Click the **Share** menu button and select **Update Collaborators**.
5. Select **Update Collaborators**
6. To add a collaborator, search for the staff member under **Add Collaborator**. Click their name. The user will pop into the left column of the screen, under **Collaborative Team**. Adjust permission as needed.
7. To remove a collaborator, find their name under **Collaborative Team**. Change the dropdown to show **No Access**.
8. Click the **Save** button.