

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 **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
- Transfer document ownership
- Share documents after losing access

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
 - Sign electronically
 - Add/remove attachments
- **Can Edit:**
 - Edit documents
 - Sign electronically
 - Add/remove attachments
- **Can View:** View documents as read-only
- **None/Remove:** No access/removes 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 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.


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 **Documents** page.
2. Use filters in the blue bar to search for documents that you wish to add or remove collaborators to.
3. Select the documents you wish to update. To select all documents, use the checkbox button on the top left of the screen.
4. Click the **Share** menu button and select **Update Collaborators**.
5. To add a collaborator, search for the staff member under **Add User**. Click their name. The user will pop into the left column of the screen, under **Collaborative Team**.
6. Adjust permission as needed.
7. To remove a collaborator, find their name under **Collaborative Team**. Change the dropdown to show **Remove**.
8. Click the **OK** button.


 **Tip** If you are updating collaborators for more than 50 documents at a time, you will not be able to see the current collaborators.


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. Share/update the collaborative team for one or more documents.
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.

 **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.

Share documents after losing access

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

- The student that the document is associated with moves to a new building that the document owner does not have access to.
- 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.