

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
- 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
 - 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 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**. 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 update. 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. 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**. Adjust permission as needed.
6. To remove a collaborator, find their name under **Collaborative Team**. Change the dropdown to show **Remove**.
7. Click the **Save** button.

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

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.