

SHARING

When you create a new record, by default you are the only user that has access to that record. You can create drafts and keep them private until you are ready for them to be shared.

Share Groups and/or Users that are a part of a workflow will automatically be shared forms as they are assigned a step in the workflow.

Once a record is shared, it can no longer be deleted but can be obsoleted and a user or share group can be halted from seeing any future changes.

To navigate this Quick Reference Guide, simply scroll down, or use the following hyperlinks to jump to a specific section.

[Save & Share](#)

[Sharing a Record](#)

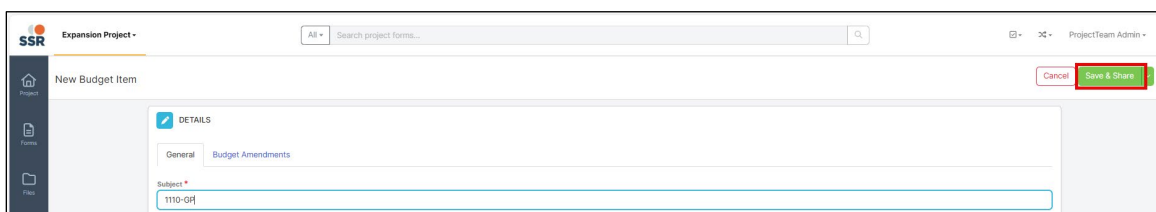
[Sharing Multiple Records](#)

[Halting](#)

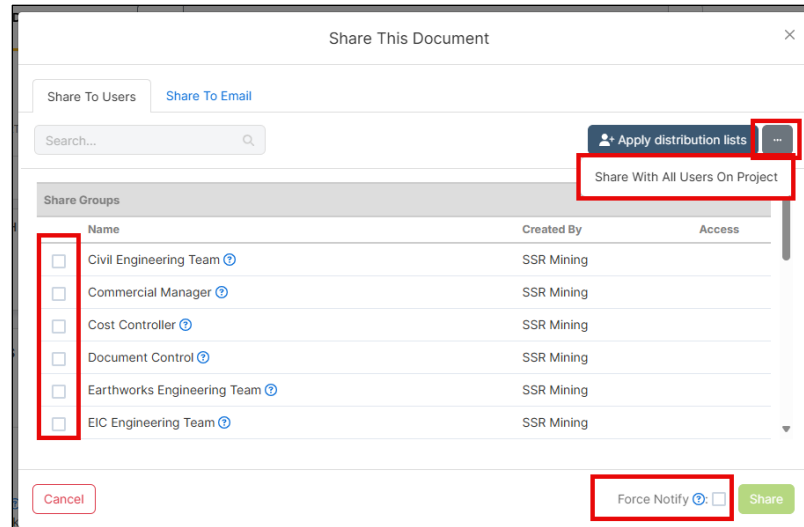
[Related Resources](#)

SAVE & SHARE

- 1) When creating a new record, you have the option to **Save & Share**. (Form types with workflows available will have Save & Start Workflow as the default action button. The workflow will automatically share the form as it moves through the steps.)
 - a. Clicking Save & Share will open the **Share Document(s)** modal.

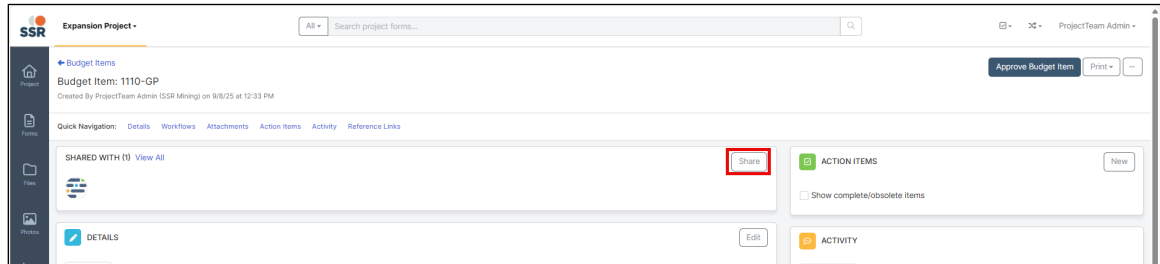


- b. Select one or more **Share Groups** (recommended), **Businesses**, or **Individual Users** to share the form with.
 - c. Alternatively, you can **Share With All Users on the Project** from the 3-dot ellipsis.
 - d. Checking **Force Notify** will send an email notification to anyone that the form wasn't previously shared with.
 - e. Click **Share**.

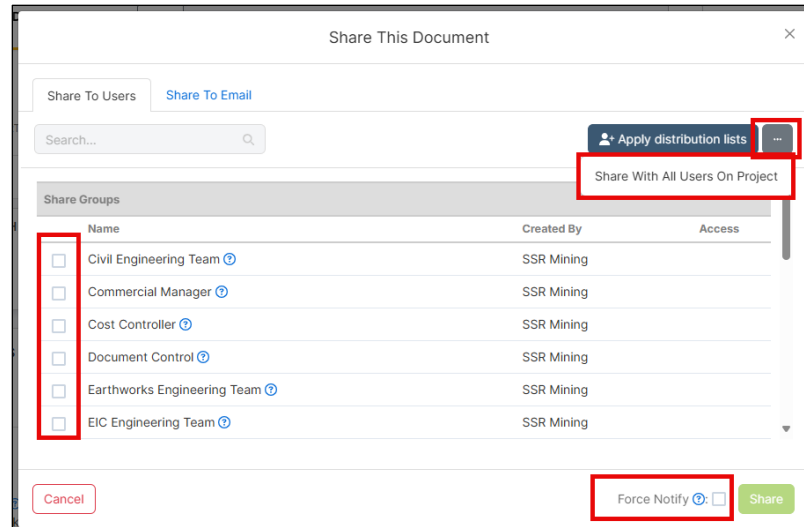


SHARING A RECORD

- 1) With any record open, the Shared With panel will appear at the top of the page.
 - a. Click **Share** from the Share With section of the open record.

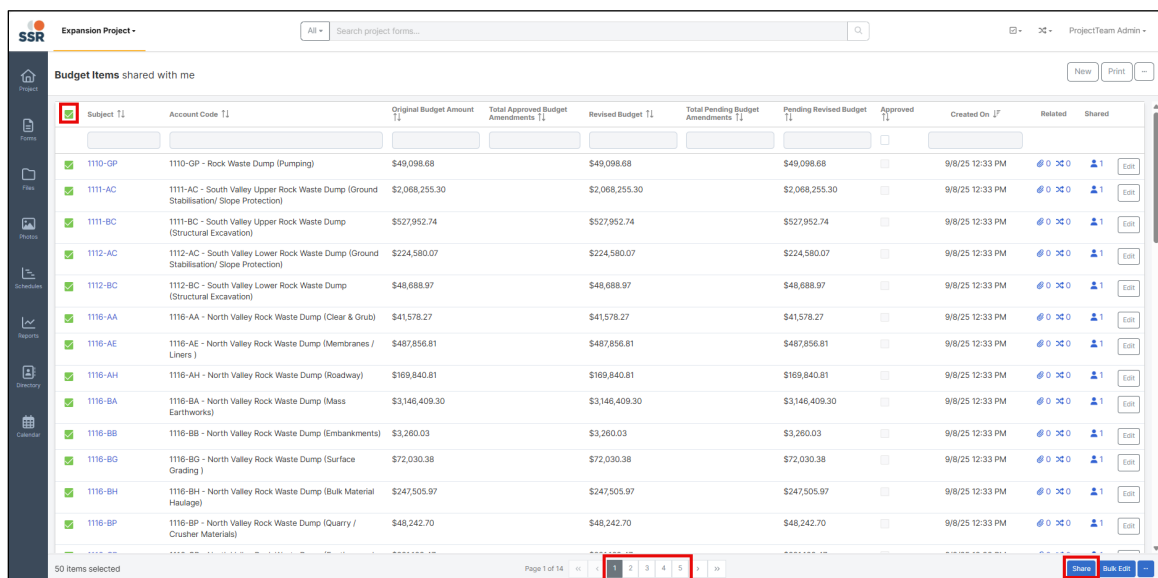


- b. Select one or more **Share Groups** (recommended), **Businesses**, or **Individual Users** to share the form with.
 - c. Alternatively, you can **Share With All Users on the Project** from the 3-dot ellipsis.
 - d. Checking **Force Notify** will send an email notification to anyone that the form wasn't previously shared with.
 - e. Click **Share**.

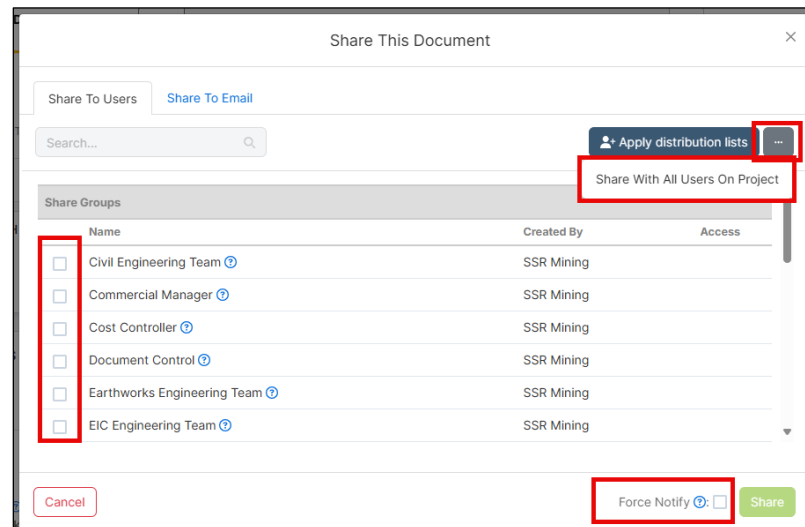


SHARING MULTIPLE RECORDS

- 1) ProjectTeam allows a user to quickly share multiple documents with one or more users from the Log View.
 - a. Check the box next to one or more records or check the **Select All** checkbox in the header to select all records on that page. Note that Select All does not select all records across all pages, just all records on that page.
 - b. Click the blue **Share** button from the bottom of the page to open the Share Document(s) modal.



- c. Select one or more **Share Groups** (recommended), **Businesses**, or **Individual Users** to share the form with.
- d. Alternatively, you can **Share With All Users on the Project** from the 3-dot ellipsis.
- e. Checking **Force Notify** will send an email notification to anyone that the form wasn't previously shared with.



Name	Created By	Access
☐ Civil Engineering Team	SSR Mining	
☐ Commercial Manager	SSR Mining	
☐ Cost Controller	SSR Mining	
☐ Document Control	SSR Mining	
☐ Earthworks Engineering Team	SSR Mining	
☐ EIC Engineering Team	SSR Mining	

HALTING

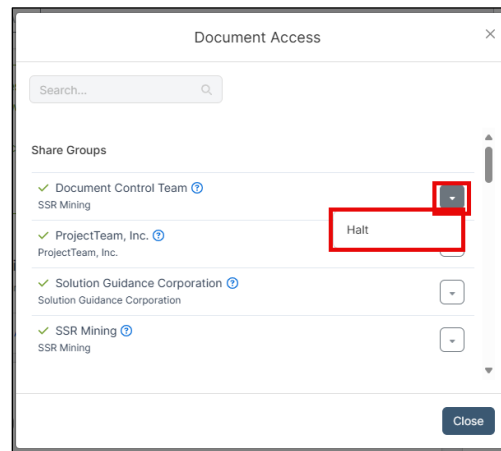
- 1) Once information has been shared, it can't be taken away. That way you never have to worry about information being accidentally lost or deleted. However, if you share information to another user but later decide that they don't need access to that information anymore, you can halt that user.

Halting the user on a form "freezes" that form so they no longer receive updates on information. The form will be taken out of the halted user's standard logs and even if they view the form they will see a banner notifying them that information may be out of date.

Once a user is halted on a form, they can no longer:

- Edit form fields
- Start new workflows
- Attach files
- View comments
- Share to other users
- Add reference links
- View the form in reports or dashboards

- To halt a group or user, navigate to the appropriate record and click the **View All** link in the **SHARED WITH** panel.
- A modal window appears that shows each share group and user's access. You'll also notice a dropdown next to each one that has been shared the record. If you click on the dropdown, you'll see the option to **Halt**.



- You can find your Halted records by clicking View All in the **Recently Created Forms** on the project's Home page.
- You can "Unhalt" share groups once they've been halted which gives them full access again on the form if needed.

RELATED RESOURCES

HELP PAGES:

[Sharing forms](#)

RELATED QRGs:

Basic Navigation