Sharing Records

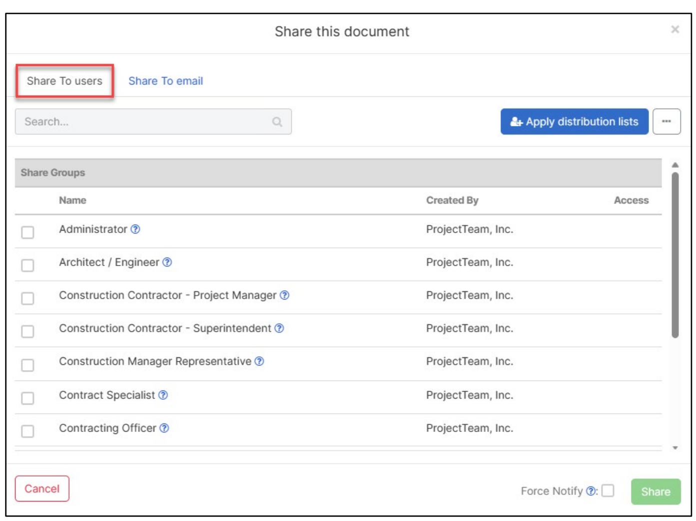
When you create a new record, by default you are the only user that has access to that record so you can create forms and keep them private until you are ready for them to be shared. Once a record is shared, it can no longer be deleted but can be obsoleted and a user or share group can be halted from seeing any future changes.

Sharing a Record

On the top of every form in ProjectTeam.com, you'll see a Share button available.

1. Click **Share** from the *Shared With* section of the open record.

2. From the *Share this document* window under the *Share to users* tab, you'll see a list that shows all Share Groups and Users that your company is connected with on the project.



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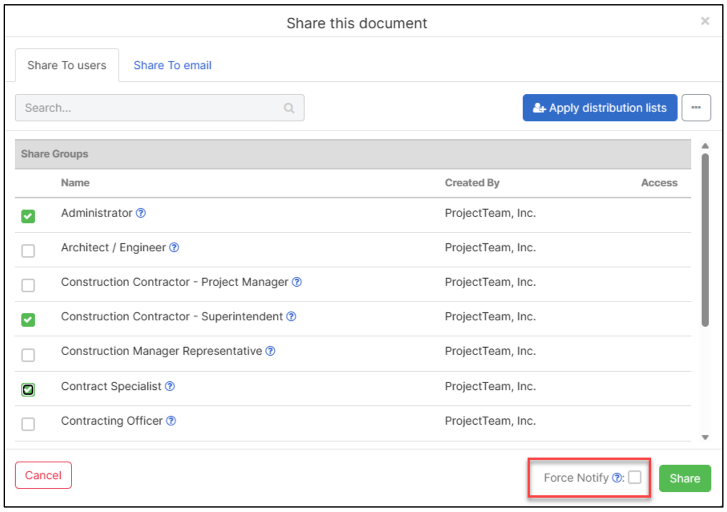
3. Select each Share Group or User you want to share the form with.
4. You can override email notification preferences to ensure an email notification is sent to everyone selected by checking the **Force Notify** box.
   Note: Users will still NOT receive an email notification if they already have access to the form.

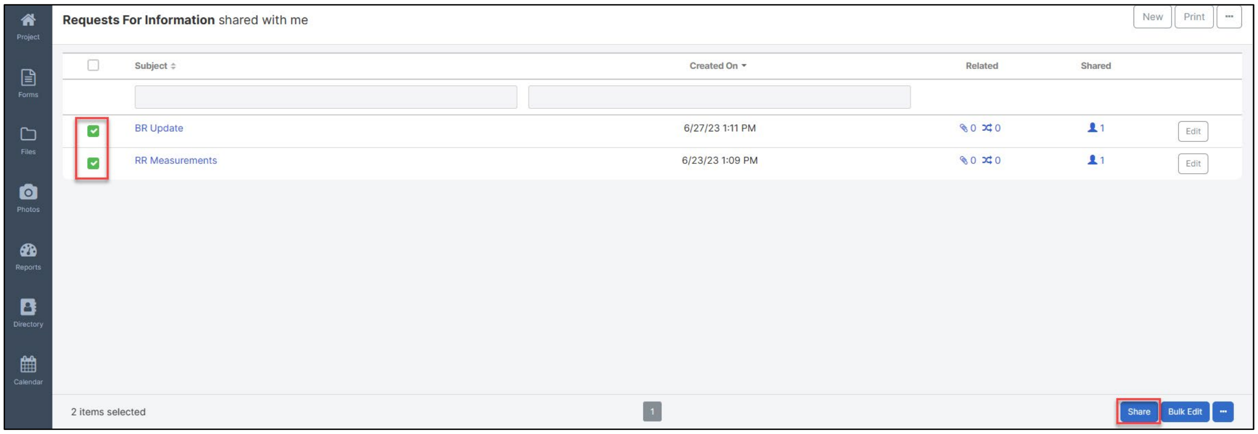


5. Click the **Share** button.
6. The selected Share Groups and Users will now have access to the form. Once shared, you will see the user's face or initials in the *Shared With* panel at the top of your form.

Sharing Multiple Records

ProjectTeam allows a user to quickly share multiple documents with one or more users.

1. Navigate to the appropriate form log.
2. Click the checkbox on the left side of one or more records you wish to share.
   a. To share all records listed on the current page, click the *all records* checkbox located on the column label row.
3. Click the **Share** option that appears across the bottom of the log once a record is selected.
4. Click the checkbox for one or more Share Groups or Users.
5. Click the **Share** button.



Halting

Once information has been shared, it cannot be taken away. However, if you later decide that the Share Group or User doesn't need access to that information anymore, you can halt them. Halting "freezes" that form so the user no longer receive updates. 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.

1. Navigate to the appropriate form and click the **View All** from the *Shared With* section.

2. From the *Document access* window, click the dropdown to the right of the Share Group or User to be halted.
3. Click **Halt**.
4. **Close** the window.

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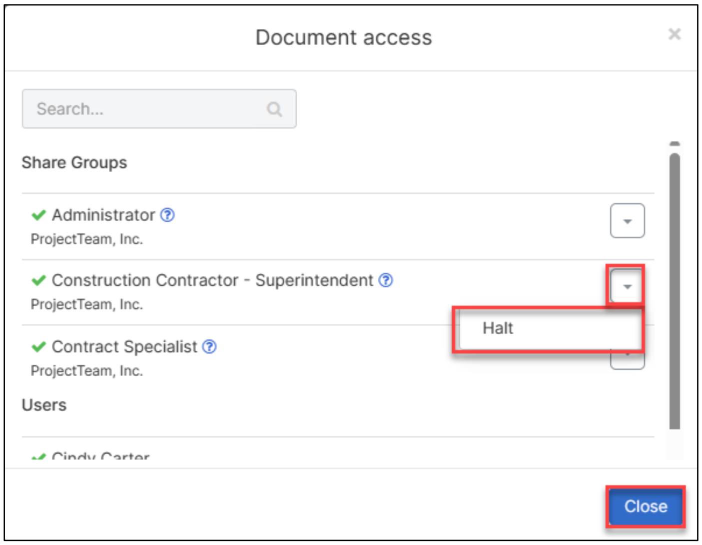

5. You can **Unhalt** a Share Group or User by repeating the steps above.

Share to Prepare for Archive

Form records, Files, and Photos that have not been *shared* are only available for the creator to access and therefore will not be included in the archiving of the project. For archiving purposes, everything should be shared with the NPS – Project Manager/Project Specialist/COR share group.

The NPS project team should direct all users to ensure all applicable records have been shared with the NPS - Project Manager/Project Specialist/COR share group. This will make forms available to be included in archive reports. *See the* ***Project Archive Preparation QRG.***

Related Resources

- Help Center Links:
  - Sharing forms (projectteam.com)
  - View Shared With (projectteam.com)
  - Create a Share Rule (projectteam.com)
  - Managing project Share Groups (projectteam.com)
- QRGs and Training Videos
  - Creating RFIs
  - Creating Submittals
  - Creating Drawings and Packages
  - Creating Meeting Minutes
  - Creating Daily Reports
  - Creating Punchlists
  - Project Archive Preparation

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