

# CTO **STREAM**



## Roles and Sharing: Removing 'Share' Access

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## Contents

|                              |   |
|------------------------------|---|
| Correcting Share Access..... | 3 |
| Roles and Sharing.....       | 3 |
| Correcting Share Access..... | 3 |

## Removing 'Share' Access

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CTO Stream supports collaboration through two different features:

- **Roles** – Provides ongoing access and permissions to users based on the role assigned. CTO has determined the access and permissions for each role, making collaboration easy and efficient;
- **Sharing** – Provides access and permission to a single specific application form. The user sharing the form determines the level of access and permission to each form shared.

When a study is first created in CTO Stream, only the project owner (user who created the project) has access to it. The project owner must use **Collaboration Features** available in the system to give access to the other research team members at their own site, as well as at each participating site.

### Roles and Sharing

CTO strongly advises Project Owners use only the **'Roles'** button to grant other users access to a project. Each role has pre-defined permissions, allowing the user to perform all necessary tasks. Granting access through **Roles** also ensures the user will receive all relevant email notifications from CTO Stream for the duration of the study.

The **'Share'** button is another collaboration feature and should only be used if a user needs access to one specific application form in the project. When someone is given access using the 'Share' feature, they can only see the specific form(s) that have been shared with them; with the permissions (read, write, share, etc.) selected by the user granting access. Contrary to this, when user is given a collaborator role, they will have access to **all existing and future forms for the duration of the study, or until their role is removed**.

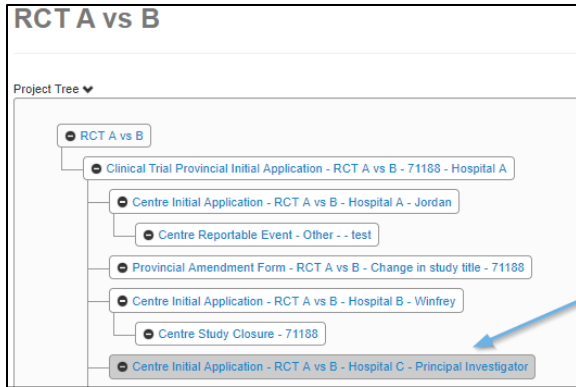
Sometimes a user is incorrectly given access using the **'Share'** button, instead of through the **'Role'** button. For this to be corrected, the user who originally granted the "Share" access must completely remove the user's permissions and re-add them using "Collaborator Roles" instead. Only the user who granted the original Share access can undo this.

**If you believe you are missing access to a form in the project, please contact the user who granted this access to confirm that you have been given a Role.**

### Correcting Share Access

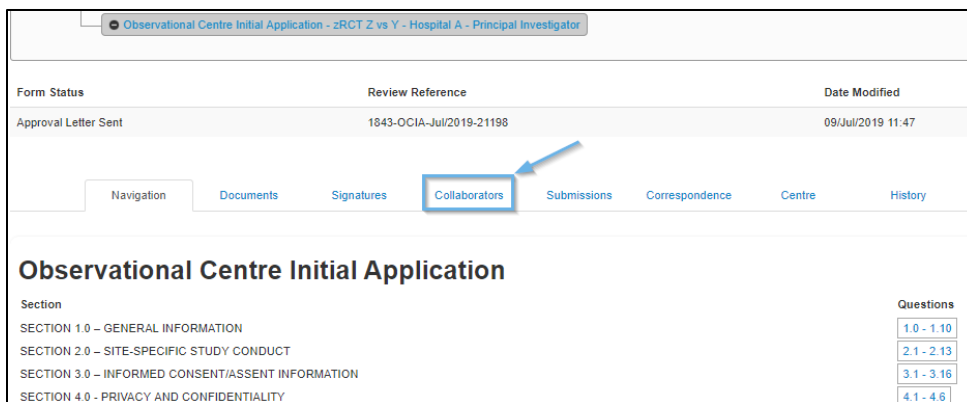
The following steps illustrate how to correct a User's access when it was granted using the **'Share'** button instead of **'Roles'**. Only the user who granted access can perform these steps.

1. In the project tree, **highlight the form** that access was granted to using the 'Share' button.

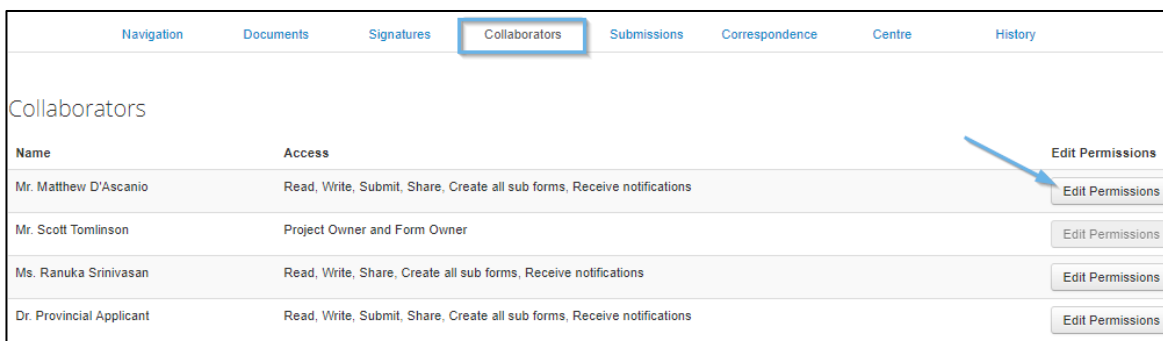


Select the form that was 'Shared' in the Project Tree

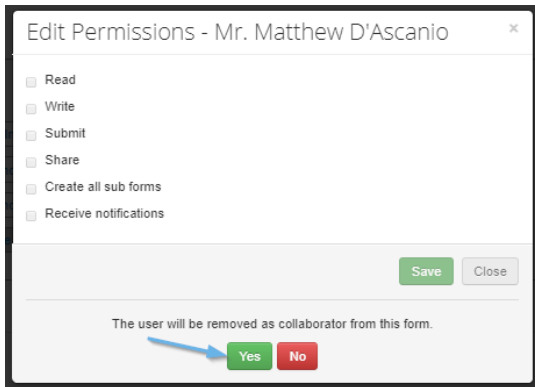
2. Go to the **Collaborator** tab located below the Project Tree. The collaborators tab contains the list of all users who have access to the selected form.



3. Find the row containing the user's name and **click the 'Edit Permissions' button** at the far right-hand side of the row.



4. **Uncheck all of the permission checkboxes then click 'Save'.** Lastly, confirm you want to remove the collaborator from the form.



5. **Re-add the user to the form using 'Roles'.** If you are not sure how to use the 'Roles' feature, please view of Roles and Sharing User Guide [here](#).

**Questions?**  
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