

Share and Collaborate

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You can share the objects you create with other users in your project or workspace. Shared users can be permitted varying levels of authorization to shared objects, which allows you to maintain control over the object while enabling broader collaboration.

 **Feature Availability:** This feature may not be available in all product editions.

Access Levels

Object type access levels

Through the roles that your project owner or workspace administrator defines, you are permitted to access types of objects based on the following access levels. For example, you can have Viewer access to plans and Author access to flows.

Access Level	Description
Viewer	Read-only access. Viewers can run jobs using these objects.
Editor	Viewer access + ability to modify and share objects.
Author	Editor access + ability to create, delete, and schedule objects.
Owner	Owner of the object is defined for the individual object and cannot be modified at the workspace level.

Object access overrides

When you share an object, you can define the access level for the user or users with whom you are sharing. This access level must be at or below the level to which they have access to the general object type through their roles.

For example:

- User A shares a flow with User B.
- User B is permitted to author flows through the user's workspace role (Author access level).
- User A can choose to share to User B with Viewer level.

These access levels are defined by the sharing user (User A) at the time of sharing.

Share Flows

You can share flows that you are developing with other users so that you can:

- **Collaborate on recipes:** work on the same recipe or sequence recipes from different users
- **Work on parallel pipelines in the flow:** Different users can build different sets of imported datasets, recipes, and outputs within the same flow
- Separate recipe development from flow metadata development: One user can focus on the recipes, while another user builds other objects, like parameters and macros, for use in the flow.

See *Share Flows*.

Collaborate on recipes

When multiple users are working on the same recipe, the following features can be used to assist in marking and tracking changes:

- To mark a step for another user to review, select **Flag for review** from the step's context menu. Enter a name for the flag and provide a description.
 - When another user sees the flag, they can review the description, make adjustments to the step if needed, and then **Mark as reviewed**.
- If there are changes in the recipe since the last time you reviewed, you can check the recipe's edit history. From the Gear icon at the top of the Recipe panel, select **See Edit History**.
- Next the recipe icon in the flow canvas, you can create and edit notes, which are visible to all users of the flow.

Migrate flows

You can migrate flows that you create to other projects or workspaces. See *Import and Export Flows*.

Share Connections

After you create a connection, you can choose to share the connection with other users of the project or workspace. When a connection is shared and the receiving user has credentials to access the connection, the user can use imported datasets in shared flows or access the same datasources as the user who created the connection.

NOTE: You must be the connection owner, a connection editor, or an admin to share a connection.

NOTE: A project owner or workspace admin can make connections public, which makes them available to all users of the environment.

See *Share Connections*.

Share datasets

Imported datasets cannot be shared directly.

- When you share a connection with credentials, the user who has been shared the connection should have access to the datasets that use it.
 - In some cases, data access may be governed by IAM roles, which may not be shared with the connection.
- If you share a flow and the receiving user has access to the data, then the imported datasets should be available in the shared version of the flow.

Export datasets

You can export the results of your jobs for use in other projects or workspaces. See *Export Datasets*.

Share Plans

 **Feature Availability:** This feature may not be available in all product editions.

You can share plans that you have created with other users.

NOTE: You must be the plan owner or an admin to share a plan. Plan collaborates may share depending on the workspace-level access assigned to their role.

NOTE: Users who have been shared plans must have share-level access to the underlying flows in order to execute the flow tasks in the plan. Plan schedules cannot be shared.

Steps:

1. In the left nav bar, click the **Plans** icon.
2. In the Plans page, hover over the plan to share.
3. Click the **Share** button that appears.
4. In the Share dialog:
 - a. Enter the email addresses of one or more users with whom you wish to share. Users must be members of the project or workspace.

Tip: You can paste in a comma-separated list of email addresses.

- b. From the drop-down, select the level to which the user or users has access.
5. To share the plan with the listed users at the selected access level, click **Share**.