Unlocking a Proposal

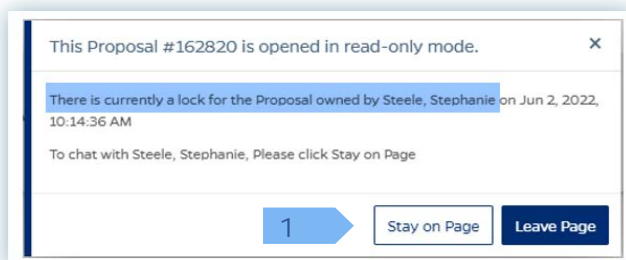*SNAPSHOTS*

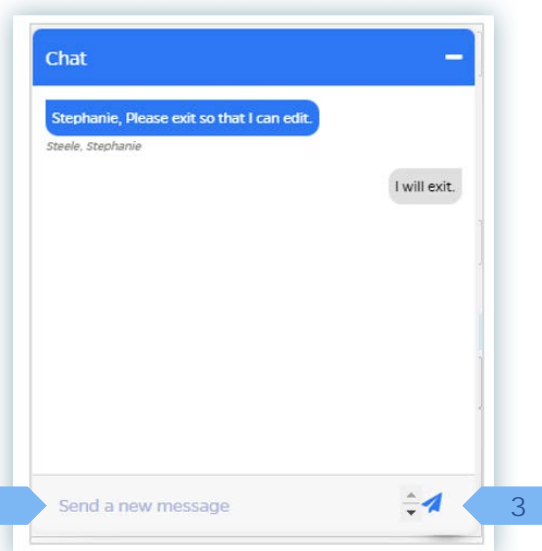## *How do I unlock a Proposal Development (PD) record?*

To access a proposal being used by another user:

If attempting to edit a proposal another user has concurrently open, the following box opens. A small lock icon 🔒 will also be visible in the upper right corner of the main window.

This Proposal #162820 is opened in read-only mode. ✕

There is currently a lock for the Proposal owned by Steele, Stephanie on Jun 2, 2022, 10:14:36 AM

To chat with Steele, Stephanie, Please click Stay on Page

1 ▶ | Stay on Page | **Leave Page**

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1. Click on the **Stay on Page** button and a **Chat** box will open.

2. Enter a message explaining that editing access is needed. Type the message in the grey box which reads *Send a new message*.

3. Click on the **blue arrow icon** 🔹 to send the message. A chat box will open on the screen of the other user.

   The other user can also chat back and forth. **Once the other user exits the proposal**, it will become available for editing.

   NOTE: Chats are not private.

The following message will display:

Chat —

Stephanie, Please exit so that I can edit.

Steele, Stephanie

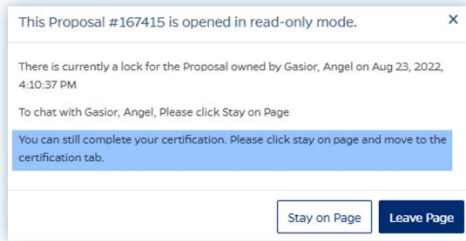I will exit.

2 ▶ Send a new message ⇕ 🔹 ◀ **3**

The lock of Proposal 162820 has been released. Please refresh the screen to access the proposal and see the latest changes or edit the fields, if any. ✕

4. Refresh your screen by clicking on the **refresh** icon ↻ which can be found in the browser's address bar at the top of the user's screen.

← → ↻ ⌂

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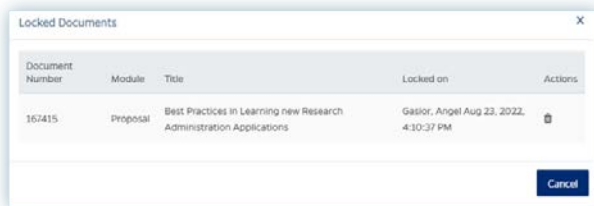
To remove your own lock:

A similar lock message displays when a user is locked out of their own PD. Note the last paragraph indicating that they are still able to complete their own certification, if appropriate.
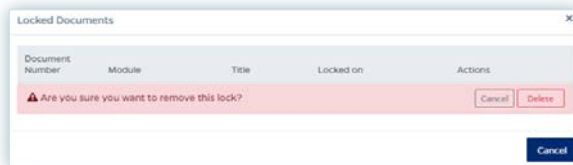

- ☐ Click on the **Lock** icon 🔒 that appears after your name at the upper right corner of the Fibi window:
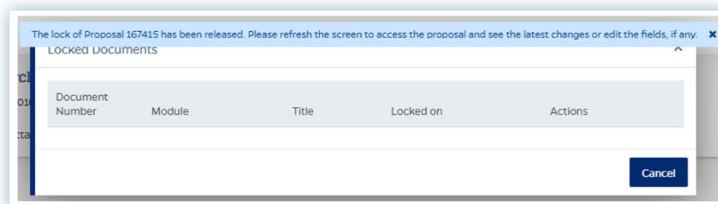

- ☐ Click on the **Delete** icon 🗑 that looks like a trashcan to delete the lock.

- ☐ Click on the **Delete** button.

- ☐ The following message will display. Click on the **X** in the message and the locked documents box.

- ☐ Click on the **Refresh** icon in the upper right corner of your browser.

- NOTE –

If you are still having difficulty unlocking the proposal, contact ORIS Support:

- ☐ Click on the **ORIS Support** tab and send the ORIS team a message,
- ☐ Click on the **Request for Support** button,
- ☐ Enter a message explaining the issue.
- ☐ Click on the **Submit Question** button.

-Or-

Send an email ORIS@jhu.edu with **Unlock PD** in the subject line.

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