Unlocking a Proposal

*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.

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:

   "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.
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.