Unlocking a Proposal

Why is my record locked and how can I prevent locking issues?

Records lock when a user is in the proposal record in edit mode. This keeps data from being overwritten at the same time. Only one user can edit at a time, so the record locks. If a record is locked, another user can still view the whole record, but they cannot edit.

In order to prevent a record from being locked, users should always navigate to the Dashboard when finished working in a record.

- Click on the Dashboard icon 🕐 to prevent locking issues.

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.
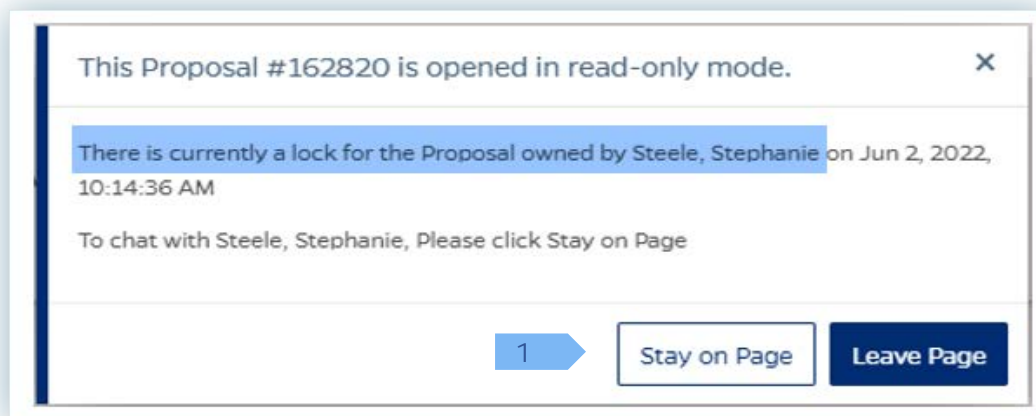

1. Click on the **Stay on Page** button and a **Chat** box will open.

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.

2

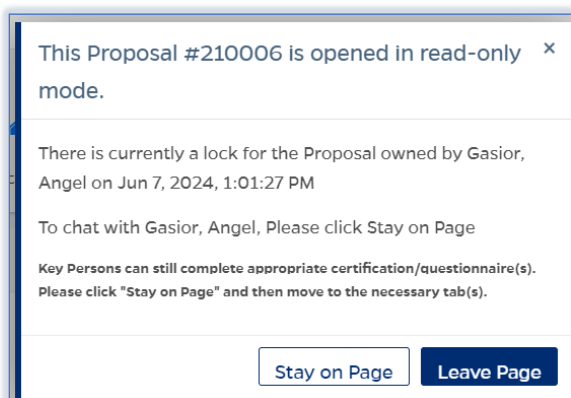**3**
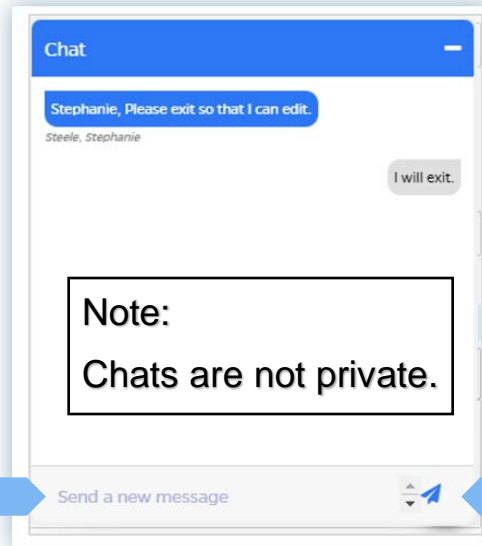
A message similar to the one below will display:

> 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.

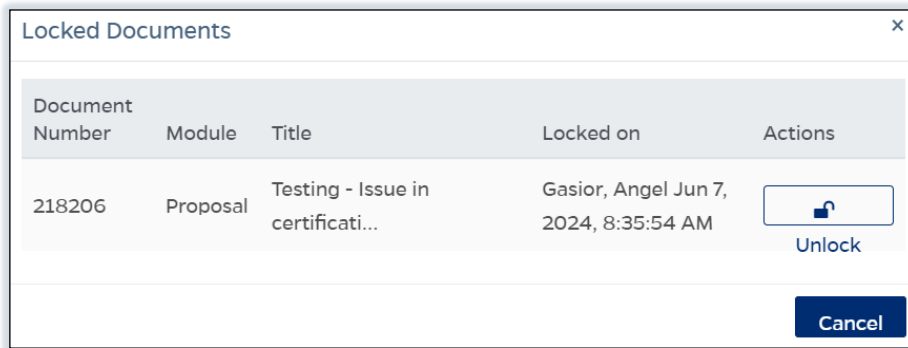_____

To remove your own lock:

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

This Proposal #210006 is opened in read-only mode. ✕

There is currently a lock for the Proposal owned by Gasior, Angel on Jun 7, 2024, 1:01:27 PM

To chat with Gasior, Angel, Please click Stay on Page

Key Persons can still complete appropriate certification/questionnaire(s). Please click "Stay on Page" and then move to the necessary tab(s).

[Stay on Page] [Leave Page]

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

Dashboard of Gasior, Angel 🔒

☐ Click on the **Unlock** icon.

Document Number	Module	Title	Locked on	Actions
218206	Proposal	Testing - Issue in certificati...	Gasior, Angel Jun 7, 2024, 8:35:54 AM	🔓 Unlock

Locked Documents ✕

Cancel

☐ Click on the **Unlock** button.

Locked Documents ✕

Document Number	Module	Title	Locked on	Actions

⚠ Are you sure you want to remove this lock?   Cancel   Unlock

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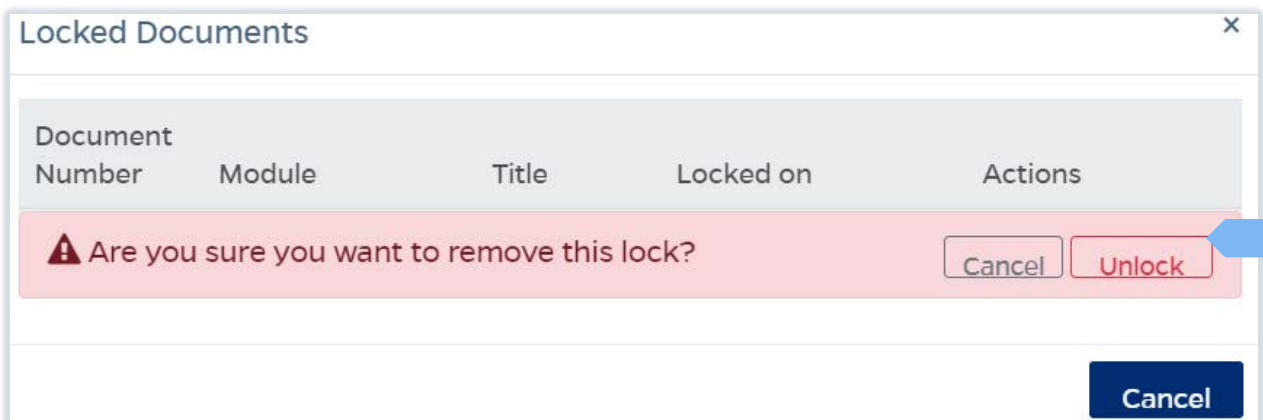
☐ The following message will display. Click on the **X** in the message and the locked documents box.

The lock of Proposal 167415 has been released. Please refresh the screen to access the proposal and see the latest changes or edit the fields, if any. ✕

Locked Documents ⌃

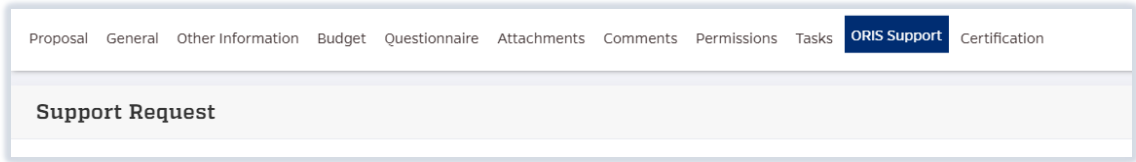| Document Number	Module	Title	Locked on	Actions

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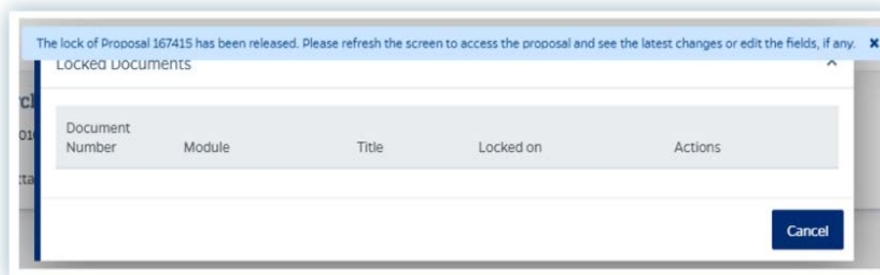
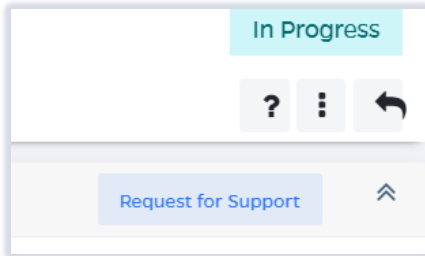☐ Click on the **Refresh** icon in the upper right corner of your browser.

← → C ⌂

NOTE: If you are still having difficulty unlocking the proposal,

☐ Click on the **ORIS Support** tab and send the ORIS team a message,

Proposal	General	Other Information	Budget	Questionnaire	Attachments	Comments	Permissions	Tasks	ORIS Support	Certification

Support Request

☐ Click on the **Request for Support** button,

In Progress

? ⋮ ↩

Request for Support ⌃

☐ Enter a message explaining the issue.

Need clarification? ✕

*Support Section

General ⌄

*Question

Describe your question here

4000 characters remaining

Submit Question

☐ Click on the **Submit Question** button.

-Or-

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

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