GUIDANCE

Multiple editing collaborators in your project application
Version 1.0

The Online Monitoring System (OMS) allows an application form to be edited by multiple users. All that is needed, is that the Project Owner invites the users which should have the permissions of a "Project Manager". Some important notes on this feature before showcasing the steps to take.

Project owner: The user that starts an application form is called "Project Owner" and this is the user that is ultimately responsible for the application (and later on the project). It is only the Project Owner who can mark the application for as complete, and hereby make it ready for the Authorised Signatory to sign and submit it.

Project manager: Project Managers can be invited by the Project Owner to edit the application form (and also help with other tasks like inviting Partner Managers). The project managers cannot mark the application form complete – this is only possible for the project owner.

Limitation to multiple editing: Only one user per time can edit the application form. If another project manager is already editing the application, then, there is a mechanism (described below) that protects the application form from losing data.

NOTE: Editing an application with the same user logged in from multiple locations is not supported.

STEP 1

Go to your full application. You should not be in view mode for this procedure.

STEP 2

Adding a Project Manager
This is done from the "Access" button when viewing the application form. Clicking on it leads to the Project Access overview were you can also add Partner Managers, set the Authorised Signatory and allow people to view the form.

Adding a project manager is a similar procedure to adding a "Partner Manager". You can refer to the Partner Manager guide for more details.

Please note that there is a maximum of 5 users with editing rights.

Concurrent editing of an Application form
The following two steps of this guidance describes to scenarios. The scenarios describe the flow of actions between two users, both of which have permission to the edit the application form (e.g. a Project Owner and a Project Manager):

- Senario 1: The user that wants to edit the application referred as the "Requesting User". (STEP 4)
- Senario 2: The user that is already editing the application, e.g. the "Editing User". (STEP 5)

STEP 4

Scenario 1: You are the Requesting User
When you click the "edit" button, if no one is editing the application, you will be redirected to the edit mode as usual.

On the other hand, if someone is already editing the application will be redirect to a page like this:

On this step there are 2 actions:

- "**Cancel**": If this button is pressed, then you will be redirected to the application view page.

- "**Request to take over**": If this button is pressed, then, the system will send a notification message to the user that is already editing the application. You will stay on this page and the system will make continued checks for any answer, every 15 seconds.

ℹ️ Checking for a response in **03** seconds.

The page will also display a countdown timer. The timer tells you when the next check automated status check will occur.

The next steps for the process are:
If the "Editing User" declines the request, you will be notified about this, and you will be redirected back to the application view page.

Request to take over

User declined your request due to reason: "**Not Now**".
You will be redirected to the application view in 10 seconds.

✓ OK

If the "Editing User" accepts the request, then you will be redirect to the editing mode automatically.

If the "Editing User" do not respond within 3 minutes the system will automatically execute the "Accept" action and you will be redirected to the application edit page automatically. A countdown timer shows how much time the other user has to respond.

ℹ️ The editing user has **2:43** to respond before automatic take over.

Scenario 2: You are the Editing User
If you are already editing the application and someone else sends a request to take over, then you will get a notification like this:

Request to take over

User **FDA Sweden** requested to take over editing of the application. Are you allowing to him to edit the application?

✓ Accept

If you press "Accept" the form will be saved and you will return to viewing the application.

Reason for declining the request:

[   ]   ✗ Decline

If you press "Decline" the system will inform the user that you are not ready to pause editing from your end. You can add a comments to be sent to the user.
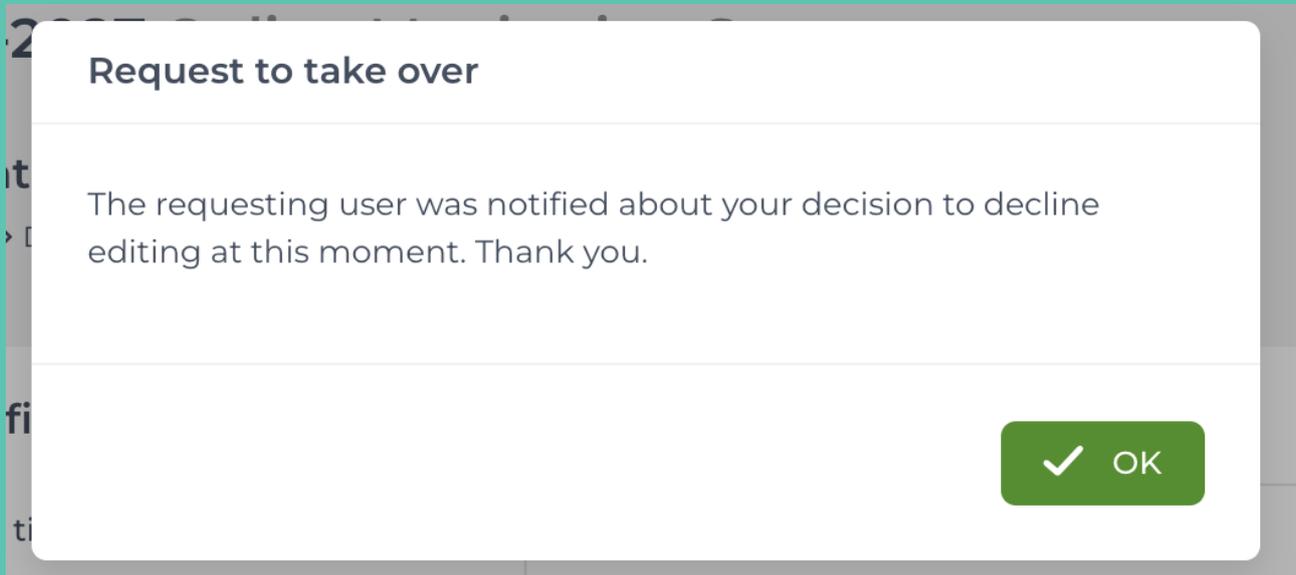
2:49

You have 3 minutes to reply. If no answer is provided, the form will automatically be saved, you will be exited from editing the form, and editing access given to the requested user.

Here there are 2 options for you and one automated action:

- "Accept": If you press that button, then the application form will be saved automatically and you will be redirected to the view page of the application.

- "Decline": If you press that button, then the "Requesting User" will be notified about this. Also, the notification window will close and you can continue with your editing as you were. Before pressing that Decline button, you can also write a message to send to the "Requesting User" on the reason for your action.

Request to take over

The requesting user was notified about your decision to decline editing at this moment. Thank you.

✓ OK

- Auto timer: If nothing is pressed within 3 minutes the system will perform the "Accept" action.