

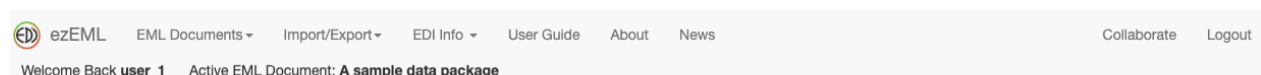
Collaborating With Others in ezEML



When you create a document in ezEML, that document resides in your ezEML account. We say that you are its **owner**. It can be useful, however, to invite one or more of your colleagues to collaborate with you in editing, reviewing, and maintaining a document, without having to share ezEML login credentials. One way of collaborating is to use ezEML's **Send to Colleague** feature in which a zip file is emailed to your colleague containing the ezEML document and associated data files, which they can then open in ezEML, in their own account.

This can result in a lot of sending packages back and forth, however, and confusion because of there being multiple versions of the same package. Instead, the **Collaborate** feature lets you invite one or more other ezEML users to collaborate with you in editing one of your data packages *directly*. The package will continue to reside in your ezEML account, but your collaborators will be able to access and modify it via their ezEML accounts. You share a single instance of the package.

To use collaboration, click the **Collaborate** link at the top right of the page.



This brings you to a page that looks like this:

Collaborate ?

My Collaborations

Show entries

| Package | Owner | Collaborator | Start Date | Status | Action |
|----------------------------|-------|--------------|------------|--------|--------|
| No data available in table | | | | | |

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The **Collaborate** page displays a table showing all of the collaborations to which you are a party. These include collaborations involving packages for which you are the **owner** – i.e., packages that reside in your ezEML account – and packages for which you are a **collaborator** – i.e., packages owned by another user who has invited you to collaborate with them. In the sample above, the table is empty because no collaborations have been established yet.

Establishing a Collaboration

In order to collaborate with someone, you, as the document's owner, need to invite one or more other ezEML users to collaborate, and they need to accept the invitation.

To invite someone to collaborate, click **Invite a Collaborator**. The invitation will pertain to the ezEML document you currently have open, so if you don't currently have a document open or the open document isn't one that you own, the button is disabled. Clicking **Invite a Collaborator** takes you to a page that looks like this:

Invite a Collaborator

Invite a collaborator to join you in editing: **A sample data package**.

An invitation email will be sent to your collaborator using the information you provide below.

The email will contain an identifying code and instructions that will allow your collaborator to join your project.

The email will be sent from email address support@edirepository.org. You may want to let your collaborator know to expect an email from that address so they don't accidentally delete it as spam.

Your Name *

Your Email Address *

Collaborator's Name *

Collaborator's Email Address *

Send Invitation

Cancel

Enter your name and email address and the name and email address of the person you're inviting. They will be sent an emailed invitation that contains a unique code identifying this particular invitation. As the invitation email will explain, they'll need to log in to ezEML, go to the **Collaborate** page, click **Accept an Invitation**, and enter the invitation code they received.

You can invite multiple users to join the same collaboration simply by sending additional invitations.

After an invitation is accepted, the collaboration is established. An email is sent to the owner telling them that the invitation was accepted, and the **Collaborate** page now lists the new collaboration.

The owner's collaborations table now shows something like this:

Collaborate 

My Collaborations

Show entries

| Package | Owner | Collaborator | Start Date | Status | Action |
|-----------------------|--------|--------------|------------|------------------|---|
| A sample data package | user_1 | user_2 | 2023-04-20 | In use by user_1 | Make available End collaboration |

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It shows the one collaboration that has been established so far for the logged-in user, user_1 in this example. If user_1 was the owner of other collaborations, those collaborations would also be listed, as would any collaborations in which user_1 is a collaborator, not the owner.

Coordinating Access to Shared Documents

Whoever is currently working in a shared ezEML document acquires a **lock** that prevents others from accessing it simultaneously. The lock is held until that user either releases the lock (via the Collaborate page), closes the document, opens a different document, or remains inactive for a period of time. If you try to access a document that is currently locked by someone else, you will be prevented from doing so and told why. While you are editing a document, ezEML is constantly keeping track of the fact that you're working on that document. You don't have to do anything to tell ezEML to lock it. It's automatic.

Note that in the example above, package edi.14.1 has **Status** shown as **In use by user_1**. Because user_1 currently has the document open, the document is temporarily locked against other users. Note also that the **Action** column contains two links. Clicking **Make available** releases the lock so collaborators can access the document. **End collaboration** ends the collaboration altogether. **End collaboration** lets you clean up your **Collaborate** page when a document has been completed.

Note that **End Collaboration** is only shown when you are the owner and you have the document in use (i.e., locked). The latter requirement ensures that you don't end the collaboration while a collaborator is in the midst of making changes.

In the example above, user_1 is the logged-in user and the owner of A Sample Data Package. User_2 is the collaborator. What user_2 sees is something like this:

Collaborate ?

My Collaborations

Show entries

| Package | Owner | Collaborator | Start Date | Status | Action |
|-----------------------|--------|--------------|------------|------------------|--------|
| A sample data package | user_1 | user_2 | 2023-04-20 | In use by user_1 | |

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Again, the status is “In use by user_1.” There are no Action entries in this case because there is nothing the collaborator can do at this point while the document is locked by user_1.

Now, suppose user_1 clicks **Make available** to release the document. This closes the document (because if it stayed open ezEML would conclude it’s being worked on, and the lock would immediately go back into effect). Now user_1’s **Collaborate** page would look like this:

Collaborate ?

My Collaborations

Show entries

| Package | Owner | Collaborator | Start Date | Status | Action |
|-----------------------|--------|--------------|------------|-----------|--------|
| A sample data package | user_1 | user_2 | 2023-04-20 | Available | |

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The status has changed to **Available**. User_2, the collaborator, now sees:

Collaborate ?

My Collaborations

Show entries

| Package | Owner | Collaborator | Start Date | Status | Action |
|-----------------------|--------|--------------|------------|-----------|----------------------|
| A sample data package | user_1 | user_2 | 2023-04-20 | Available | Open |

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The status is **Available**, and there is an **Open** link as an action. Clicking the Open link will open the document. This is the only way for a collaborator to open a shared document. The document's *owner* continues to use the ordinary method to open the document – i.e., by going to the **EML Documents** menu and clicking **Open...**

After clicking the Open link, user_2 is taken to the Title page and can edit the document as if it were user_2's account. The only difference is that at the top of the page where the Active EML Document is shown, it now indicates the owner of the document:



Opening the document automatically marked it as in use by user_2, i.e., locked. User_1 will see **In use by user_2** on their Collaborate page.

Let's say user_2 modifies the document and then either clicks **Make available**, closes the document, logs off, opens another document, or is inactive for a period of time. Any of those actions will cause the document to become **Available** again. Then if user_1 opens the document, user_1 will see all of user_2's changes. And *vice versa*. Both users are working on the same instance of the document, namely, the one in user_1's account.

Data Tables and Other Entities

Please note that all of the changes you make to a shared package occur in the account of the owner.

In particular, if you upload or reupload a data table, the table is uploaded to the account of the owner of the ezEML document. This way, when you are done editing, you have a complete package in the owner's account, ready for submission to the EDI repository.

Refreshing the Collaborate Page

Please note that if you've been sitting in the Collaborate page for any length of time, the status displayed for a package may be out of date. ezEML does not refresh its pages asynchronously, all on its own. It requires a user action to cause a page to update. So, when in doubt, refresh the page by clicking the **Collaborate** at the top of the page again to see the current status of all packages in the active collaborations.