Infonetica Ethics RM – Sharing an Application

1. Introduction

Sharing a form enables others to collaborate on the form with you, or review the form and provide comments / feedback, depending on the access you give them.

2. Sharing an application

A. From within the form, click **Roles**
B. Enter the colleague’s email address*
C. Select the role you want the person to have from the drop down menu (the roles available will depend on the application being completed)
D. Click **Share Role**
E. To share with more than one person, click + to open another email address box

*If the colleague does not have access to the system an option to invite them will be displayed (F)

3. Viewing comments

- The person you share the form with will receive an email with a link to the form
- If they have been given Read or Write access they can click on the **Comments icon (G)** at the top of each section and add comments
- The number of comments for each section will show in the icon (G) and the total comments for the form will show within the **Comments action button (H)**

**NB**

All PhD, Masters and Honours students will be set up within Ethics RM with their @aucklanduni.ac.nz email address, e.g. fcru139@aucklanduni.ac.nz

**Role Permissions**

- Collaborator: Read only
- DHB Research Admin: Read, Write, Submit, Receive notifications
- Student: Read, Write
- Co-investigator: Read, Write. Share, Receive notifications

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4. Collaborating on a form

- The person you share the form with will receive an email with a link to the form.
- If they have been given **Write** access they can edit or add new content to the form.

A. All those with **Write** access will be able to work on the form simultaneously, if separate **Sections/Questions** are selected by each user.

B. If more than one person is in the same **Section/Question**, then the **yellow exclamation icon** will be displayed, hovering over the icon will display the name of the other person.

When more than one person is updating the same section at one time, the system will only save the information entered during the latter update. The former update will be lost.

**NB**
- It is not possible to edit the permissions within a role. If different access is required, the original shared role must be removed and another added.

5. Viewing and amending collaborators access

C. Click on the **Collaborators** action button to see who you have shared the form with.

D. All collaborators will be displayed along with the access that has been granted.

E. Click on the **Roles** action button.

F. All collaborators will be displayed along with the Role that has been shared.

G. Click on a **Remove** to remove the access granted to the user.

H. Enter the colleague’s email address.

I. Select the new role you want the person to have from the drop down menu.

J. Click **Share Role**.