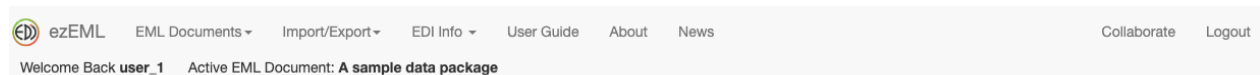# Collaborating With Others in ezEML

When you create a data package in ezEML, that package resides in your ezEML account. We say that you are its **owner**. It can be useful to invite one or more of your colleagues to collaborate with you in editing, reviewing, and maintaining a package, without having to share ezEML login credentials.

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, next to Logout.

This brings you to a page that looks like this:

The Collaborate page can also be reached by clicking **Submit/Share Package** in the main Contents menu, and then clicking **Collaborate with Colleagues**.

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 package'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 emailed an invitation containing a unique code identifying this particular invitation. As the invitation email explains, 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 collaborate on a given package 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:

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.

The names user_1 and user_2, here, are just fictitious accounts created for this example. In practice, you would see the ordinary ezEML usernames of you and your collaborator.

Coordinating Access to Shared Documents

Whoever is currently working in a shared ezEML document acquires exclusive use of the document; ezEML prevents others from accessing it simultaneously. Exclusivity is held until the user either releases the document (by clicking **Make available** on the Collaborate page; see below), closes the document, opens a different document, logs off, or remains inactive for a period of time. If you try to access a document that is currently in use 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 grant exclusivity. 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 collaboration 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:

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 automatically closes the document (because if it stayed open ezEML would conclude it's being worked on by user_1, and the lock would immediately go back into effect). Now user_1's **Collaborate** page would look like this:

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

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 in 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 remains inactive for a period of time. Any of those actions will causes 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, shared instance of the document: namely, the one in user_1's account.

Data Tables and Other Entities

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 everyone is done editing, there is a complete package in the owner's account, ready for the owner to submit 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. I.e., ezEML does not refresh its pages asynchronously, on its own. It requires a user action to cause a page to update. So, when in doubt, refresh the page by clicking **Collaborate** at the top right of the page again to see the current status of all packages in the active collaborations.

Collaborating with EDI's Data Curation Team

ezEML's collaboration "machinery" for collaborating with colleagues is also used by the **Submit Package to EDI** feature. When you submit a package to EDI, a *group* collaboration is automatically established with the entire EDI data curation team, with you as owner. For more on this feature, see "Submitting Your Package to EDI" in this User Guide.