



## **IEP Multi-User Form Editing (IL)**



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**Editing Fields from the Form Itself**

Document/Field Locks and Auto-Save

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**Editing Fields from the Conference Screen**

Field Locks and Auto-Save

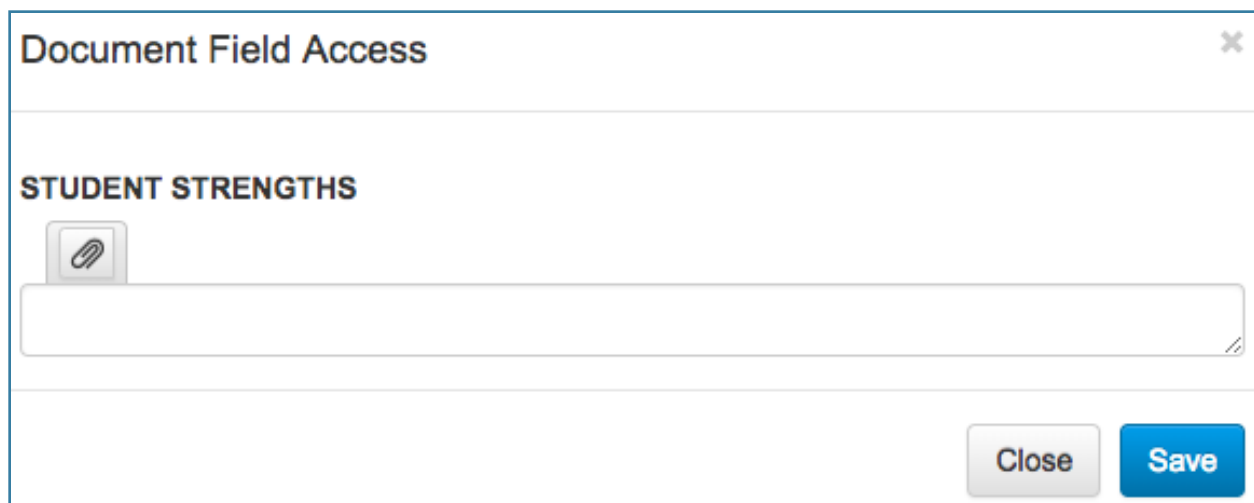
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Multiple users can edit separate individual fields at the same time on specific forms in EmbraceIEP. The editable fields can be accessed within the form itself, or via the form's gear icon on the conference screen.

### Editing Fields from the Form Itself



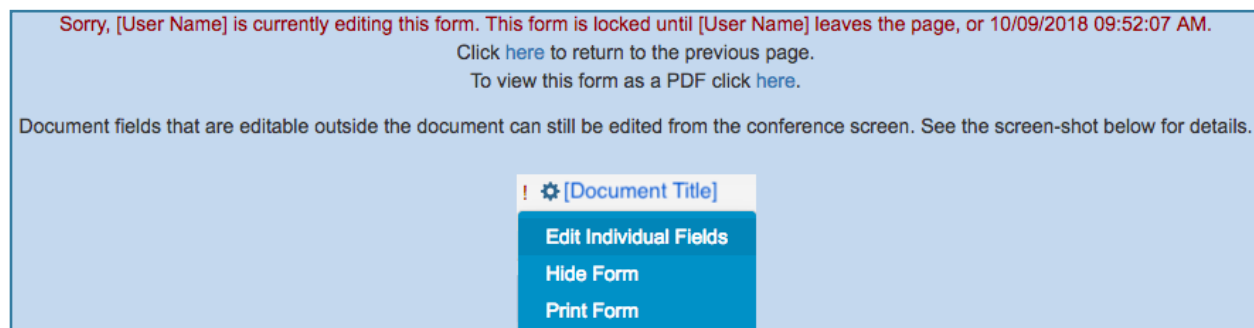
Within a form, fields that can be edited individually by separate users will appear locked until a user clicks the blue edit icon next to the field. Clicking on this icon will open a modal, or window, with a dynamically expanding text area, and if applicable, picture upload options.



Once changes have been completed, click [Save]. To leave the field without saving, click [Close]. This will close the modal and allow the user to access the rest of the form, other individual fields, etc.

### Document/Field Locks and Auto-Save

Accessing a form will temporarily lock the form itself, preventing other users from accessing the form's data entry page. When one user is viewing the form in data entry mode, and another user tries to access the form in data entry mode as well, the user will receive the following message.



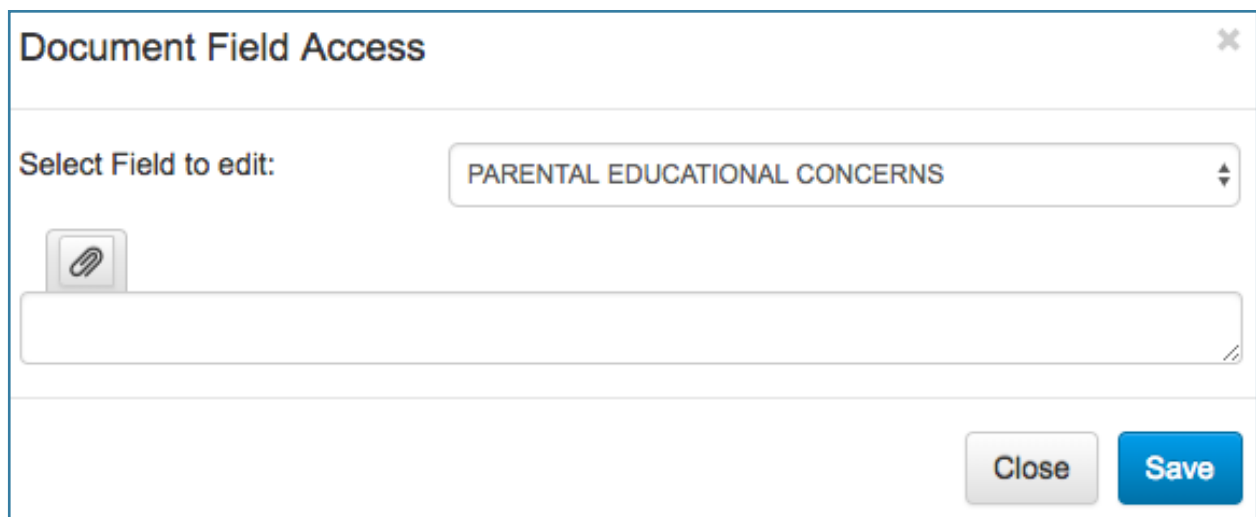
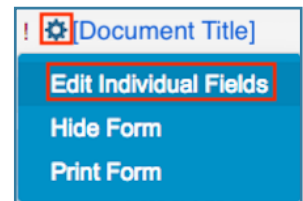
Individual fields can still be edited from the gear icon on the blue conference screen while another user is on the form itself. Accessing an individual field will lock other users from editing the same field until the current user is finished. Auto-save will fire separately every 2 minutes on the form itself and on the current field being edited. The fields on the data entry form will automatically refresh every 5 minutes, but can also be manually refreshed, using the [Refresh Field Information] button.



### **Editing Fields from the Conference Screen**

If a user tries to access a form that another user is currently editing, the form itself will be locked, but individual fields can still be edited.

Using the gear icon next to the form's title, select [Edit Individual Fields]. This will open a similar modal, or window, to the one seen from the form itself, with a drop menu, allowing a user to select which field to edit. As is the case on the form itself, selecting a field will open a dynamically expanding text area, and if applicable, picture upload options.



The modal window titled "Document Field Access" features a close button (X) in the top right corner. Below the title bar, there is a label "Select Field to edit:" followed by a dropdown menu currently displaying "PARENTAL EDUCATIONAL CONCERNS". Underneath the dropdown is a text input field with a paperclip icon on the left, indicating a file upload option. At the bottom right of the modal, there are two buttons: a grey "Close" button and a blue "Save" button.

Once changes have been completed, click [Save]. To leave the field without saving, click [Close].

### **Field Locks and Auto-Save**

Accessing an individual field will lock other users from being able to edit the same field until the current user is finished. Other users may edit other available fields in the meantime. Auto-save will fire every 2 minutes while editing an individual field.