

# Mentor ePolls

User Guide

Edited Sept 1, 2011

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# 1 Introduction

## What is ePolls?

- ePolls is the newest feature of Mentor, the IEEE tool for working group collaboration.
- ePolls allows group officers to set up online ballots strictly for the use of their groups.
- ePolls is structured similarly to the myBallot section of myProject™, but is flexible enough to be used for whatever the group wishes to use it for.
- Unlike myBallot, ePolls will **not**: handle group balance, allow for recirculations or create automatic notifications and invitations.

# 2 Getting Started

## 2.1 Accessing ePolls

### Applicable Users:

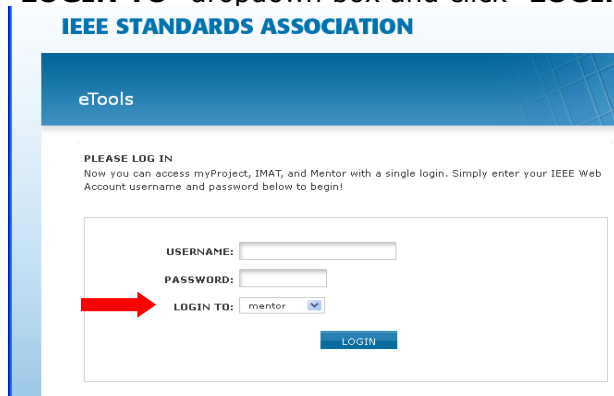
All Users

### Note:

Your group must have access to ePolls turned on by the system administrator. To have this feature made available to you, email [myproject-admin@standards.ieee.org](mailto:myproject-admin@standards.ieee.org) or contact your staff liaison for more information. A complete list of staff liaisons can be found here: <https://development.standards.ieee.org/pub/liaisons>

### Instructions:

1. Open your web browser and go to the eTools login page at: <https://development.standards.ieee.org/my-site>
2. Type in your IEEE web account username and password, select "**Mentor**" from the "**LOGIN TO**" dropdown box and click "**LOGIN**".



3. Select your group name from the "**mentor**" dropdown menu to access your group's mentor page.

Home | Wiki | Blog | Documents | Mail



Welcome to Mentor TEST SITE

mentor ▼ | eTools | Logout  
 1900  
 1900.5  
 25-Jul-2011 08:39:35 ET

Mentor is currently providing services to the following groups. If your group is interested in using this tool, please contact your IEEE-SA Staff Liaison for more information.

NOTE: A comprehensive listing of all Smart Grid Working Groups who are using Mentor can be found [here](#)

- [IEEE Personal Health Devices Working Group](#)
- [IEEE RMLT WG13](#)
- [IEEE 1547.7 Working Group](#)
- [IEEE SCC21 P1547.8 Working Group](#)
- [IEEE 1725 Working Group](#)
- [IEEE 1900 Working Group](#)
- [IEEE 1901 Working Group](#)
- [IEEE 1904 Working Group](#)

4. From your group’s mentor area, click “**ePolls**” in the top left corner. If you don’t see “**ePolls**”, click the “more” dropdown menu and select “**ePolls**”.

Home | Wiki | Applicants | Blog | more ▼



P1900.5 Working Group

edited 12-Jul-2010 by invalid:m.j.ceglia@ieee.org

Welcome to the Policy Language and Architectures for Managing Cognitive Radio for Dynamic Spectrum Access Applications working group document repository.

If you are a member of the working group, please verify that you have signed up for the P1900.5 working group listing in myProject. Verification can be made by accessing the Manage Activity Profile link found on the myProject home screen.

Steps:

1. Please access the myProject system (<https://development.standards.ieee.org>)
2. Once you have accessed the myProject Home screen, click on Manage Activity Profile
3. Once there, please click the (+) sign to expand the IEEE-SASB Coordinating Committees listing
4. Once the screen refreshes, click the (+) sign to expand the SCC41 - Dynamic Spectrum Access Networks listing
5. Lastly, place a check mark in the working group listing and hit continue

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Document Groups  
 Documents  
**ePolls**  
 Files  
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 Roster

1900.5 ▼ | Help | eTools | Logout

Search

25-Jul-2011 08:40:19 ET

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## 2.2 ePolls Features

This is the main screen for ePolls. All currently open polls will show up on this first screen. The features of this screen are as follows:

The screenshot shows the IEEE Mentor ePolls interface. A table lists active polls with columns for Start (ET), ePoll Name, Question, Document, End (ET), Votes [A/D/-], Vote, and Actions. Callout boxes highlight the following features:

- Start (ET)**: Date and time the poll was opened.
- ePoll Name**: Name of the poll.
- Question**: The question being voted on.
- Document**: File related to the poll (e.g., TEST.pdf).
- End (ET)**: Date and time the poll will close.
- Votes [A/D/-]**: Tally of votes cast (e.g., 0/0/0).
- Vote**: Current vote on the poll.
- Actions**: Available actions like Edit, Close, Vote, Status.
- New ePoll**: Link to create a new poll.
- Closed ePolls**: Link to view ended polls.
- ePoll Summary**: Link to view all votes for a specific poll.

**Start** – This is the date and time the poll was opened. All times are US Eastern Time.

**ePoll Name** – This is the name of the poll.

**Question** – This is the question you are responding to with your vote

**Document** – This is a file related to the poll. This is useful for taking preliminary ballots on a draft document, but polls can also be created without a file.

**End** – This is the date and time the poll will close. All times are US Eastern Time.

**Votes [A/D/-]** – This is a tally of the votes cast [**A** Approve, **D** Disapprove, - Abstain].

**Vote** – This is your current vote on the poll.

**Actions** – These are all of the actions you have available to you for a particular poll. The available actions will change depending on the status of the poll and your particular access level.

- **Edit** – Edit the poll
- **Close** – Close the poll
- **Vote** – Vote or make comments on the poll
- **Status** – View voting results and comments

**New ePoll** – Use this to create a new poll (will only be available to officers).

**Closed ePolls** – This shows all polls that have ended.

**ePoll Summary** – This allows you to view all of the votes cast for all polls in a specified date range.

## 2.3 Entity Working Group Polls

There are some features of ePolls that are specific to entity Working Groups. Most of the features of ePolls will be the same with the addition of the “**Entity ePoll**” feature. Entity ePolls allow for one vote per entity polling similar to entity balloting in myProject™. Look for **\*Entity ePoll\*** throughout this user guide for more information on this feature.

## 3 Creating a New Poll

### Applicable Users:

Officers/Admins, Staff

### Notes:

- All users listed as Working Group officers in myProject™ will have administrative access to ePolls and will be able to create and edit polls. For more information on assigning officers, see **Sec 8.2.1 Assign/Change Working Group Officers**.
- Polls created by one user may be edited, closed or deleted by any other officer/admin.
- Project-level designations (e.g. Sponsor Ballot Designee, Nescom Designee) in myProject™ will not affect access levels in Mentor.

### Instructions:

1. From the main ePolls screen, select “**New ePoll**”.
2. Fill out the fields to create your poll.
  - a. **ePoll Name** – Enter a unique name for your poll, this cannot be the same as another poll either open or closed.
  - b. **Question** – The question that will be answered by the approve/disapprove vote. Place all instructions for the specific poll in this box.
  - c. **Document** – Upload a file if the poll is related to a specific document. You can only upload one file. If multiple files are required, create a .zip file first.
  - d. **End Date** – Specify the date you would like the poll to close (use mm/dd/yyyy format e.g. 01/01/2012) or leave this box empty for an open-ended poll. All polls start when they are created, you cannot delay the start of a poll.
  - e. **Participants (Working Groups only)** – *All IC group involvement levels will have voting access to ePolls.* Place a check in the box next to the involvement level of participants you would like to have access to the poll (you must select at least one). For Working Groups, these involvement levels can be managed through myProject™. Users who have not been given an involvement level are classified as “interested” and will not have access to ePolls. For more information on managing your group involvement levels, see **Sec 8 Appendix A: Managing Mentor Groups and User Roles**.
  - f. **Comment Format** – Select the level of structure you would like to be available for comments depending on what your poll is being used for. “Must Be satisfied?” will only appear if a “Disapprove” vote is cast.
  - g. **Send a notification...** - Place a check in this box if you would like all individuals eligible to vote in this poll to receive a notification that the poll is available (will be sent out the day after the poll is created) as well as reminder emails at 14, 7 and 3 days before the closing date of the poll. Notifications will be sent through myProject™.

- h. **Allow members to view...** - Place a check in this box if you would like all poll participants to be able to view votes and comments on the status page. This can also be changed during a poll and after the poll closes.

New ePoll

[Open ePolls](#)

ePoll Name:

Question:

Document:

End Date:   
mm/dd/yyyy, leave empty for an open-ended ePoll.

Type: One vote per user

Participants:  Potential Member  
 Voting Member  
 Observer  
 Non Voting Member

Comment Format:

Send a notification to the members when the ePoll begins as well as reminders at 14, 7 and 3 days prior to the end of the ePoll  
 Allow members to view the status page for this ePoll

3. Click "OK" to create your poll.

**\*Entity ePoll\*:**

For entity Working Groups, there will be an additional "Type" field. This field lets you select between "one vote per user", and "one vote per organization".

New ePoll

ePoll Name:

Question:

Document:

End Date:   
mm/dd/yyyy, leave empty for an open-ended ePoll.

Type:  One vote per user  
 One vote per organization (Entity ePoll)

Participants:  Voting Member  
 Observer  
 Non Voting Member

Comment Format:

Additional Invitations:

Enter the email addresses of any additional people to receive an invitation to join the balloting group. Delimit each email address with a space or comma.

**One vote per user:**

With this option, any user with the appropriate involvement level will be able to vote in this poll. For more information on managing your group involvement levels, see **Sec 8 Appendix A: Managing Mentor Groups and User Roles**.

#### One vote per organization:

This option only allows the DR (Designated representative) and DRA (Designated Representative Alternate) to vote on the poll. If both the DR and DRA vote on the poll, only the DR vote will be shown in the poll results. If the DR or DRA are replaced, their votes on open polls will be removed and the new DR will be able to vote. Comments from the DR and DRA, however, will both be shown and will not be removed if the DR/DRA is replaced. For more information on DR/DRA, see **Sec 9 Appendix B: Managing DR and DRA in myProject™**.

## 4 Editing a Poll

### Applicable Users:

Officers/Admins, Staff

### Notes:

- Polls can be edited at any time while they remain open.
- Polls cannot be edited once they are closed.
- **Editing a poll does not notify the group of the change. Notifications should be handled separately through the Mentor email function.**
- All users listed as Working Group officers in myProject™ will have administrative access to ePolls and will be able to create and edit polls. For more information on assigning officers, see **Sec 8.2.1 Assign/Change Working Group Officers**.
- Polls created by one user may be edited, closed or deleted by any other officer/admin.
- Project-level designations (e.g. Sponsor Ballot Designee, Nescom Designee) in myProject™ will not affect access levels in Mentor.

### Instructions:

1. From the main ePolls screen, click **"Edit"** next to the poll you would like to see details from.



Start (ET)	ePoll Name	Question	Document	End (ET)	Votes [A/D/-]	Vote	Actions
25-Jul-2011 10:24:16	Preliminary ballot on Draft 1	Is this document ready to move forward?	TEST.zip		1/1/0	Approve	Edit, Close, Vote, Status
25-Jul-2011 09:08:37	This is a Poll	Is the sky blue?	TEST.pdf	31-Jul-2011 23:59:59	2/0/0	Approve	Edit, Close, Vote, Status

2. You will see a screen similar to when creating a new poll. Change any fields or upload a new file to replace an existing one.
3. Click **"OK"** to update the poll.

### \*Entity ePoll\*:

The **"Type"** field cannot be changed once a poll is opened.



## 5 Voting and Submitting Comments

### **Applicable Users:**

All Users

### **Note:**

- Votes can be changed by the individual voter at any time during the poll period.
- Comments are only visible by the commenter and group officers/admins unless **"allow members to view status..."** has been checked.
- Comments are not required and the ability to comment is not dependant on the type of vote, but you must vote first in order to submit comments.
- You may submit multiple comments on a single poll.

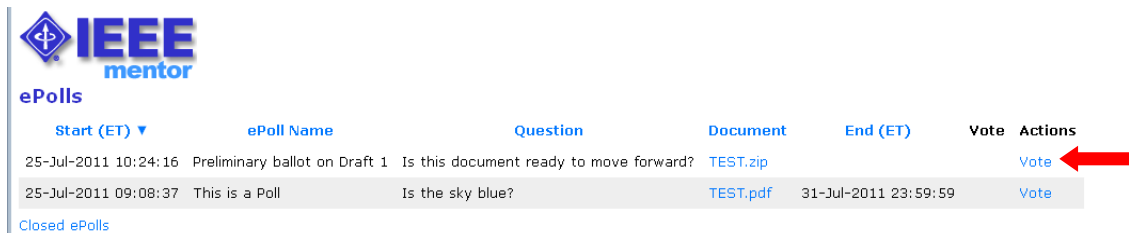
### **\*Entity ePoll\*:**

Only the DR (Designated Representative) and DRA (Designated Representative Alternate) can vote on an entity poll. If both the DR and DRA vote on the poll, only the DR vote will be shown in the poll results. Comments from the DR and DRA, however, will both be shown. The DR and DRA will not be able to see a vote the other has made, but will be able to see comments from each other once they have voted.

### 5.1 Voting

Instructions:

1. From the main ePolls screen, click **"Vote"** next to the poll you would like to vote on.




Start (ET) ▼	ePoll Name	Question	Document	End (ET)	Vote	Actions
25-Jul-2011 10:24:16	Preliminary ballot on Draft 1	Is this document ready to move forward?	TEST.zip			
25-Jul-2011 09:08:37	This is a Poll	Is the sky blue?	TEST.pdf	31-Jul-2011 23:59:59	Vote	Vote

Closed ePolls

2. Confirm your affiliation (this field will be pre-filled with your affiliation selection in myProject™).
3. Select your vote and click **"OK"**. You will receive a message telling you that you may now submit comments.

Home | Wiki | Blog | Documents | more ▾

 **IEEE**  
mentor

**Vote**  
Preliminary ballot on Draft 1: Is this document ready to move forward?

Affiliation: A Company ▾

Vote:  Approve  
 Disapprove  
 Abstain

You have not commented on this ePoll.  
[Open ePolls](#) | [Add comment](#) | [Upload comments](#)


## 5.2 Submitting Comments

### Applicable Users:

Officers/Admins, Staff

### Instructions:

1. You can make comments immediately after voting and at any time during the poll period. If you are not already in the voting screen, go to the main ePolls screen and click "**Vote**" next to the poll you would like to vote on.
2. Click "**Add comment**".

 **IEEE**  
mentor

Search    
25-Jul-2011 10:57:23 ET

Thank you for your participation in the ePoll. You may now add comments.

**Vote**  
Preliminary ballot on Draft 1: Is this document ready to move forward?

Affiliation: A Company ▾

Vote:  Approve  
 Disapprove  
 Abstain

You have not commented on this ePoll.  
[Open ePolls](#) | [Add comment](#) | [Upload comments](#)

3. Fill out any fields that are available to you and click "**OK**" to submit your comment. Fields other than "comment" will only show up if an admin/officer selects them when creating the poll.

4. Your comments will appear under your vote.

### 5.3 Uploading Comments

**Instructions:**

1. From the main ePolls screen, click “Vote” next to the poll you would like to upload comments for.

Start (ET)	ePoll Name	Question	Document	End (ET)	Votes [A/D/-]	Vote	Actions
25-Jul-2011 10:24:16	Preliminary ballot on Draft 1	Is this document ready to move forward?	TEST.zip		1/1/0	Approve	<a href="#">Edit</a> , <a href="#">Close</a> , <a href="#">Vote</a> , <a href="#">Status</a>
25-Jul-2011 09:08:37	This is a Poll	Is the sky blue?	TEST.pdf	31-Jul-2011 23:59:59	2/0/0	Approve	<a href="#">Edit</a> , <a href="#">Close</a> , <a href="#">Vote</a> , <a href="#">Status</a>

2. Click “download a blank CSV template for this ePoll” to download a template that you can edit using any spreadsheet editor.

3. Edit the file and save as a CSV file.

- An error will be generated if fields are not filled out properly.
- “Category” must be “general”, “technical” or “editorial”.
- “Must Be Satisfied” must be “yes” or “no”.

4. Click "**Browse...**" and select the CSV file.
5. Click "**OK**" to upload your comments

## 5.4 Changing a Vote

### Applicable Users:

All Users

### Instructions:

1. From the main ePolls screen, click "**Vote**" next to the poll you would like to change the vote on. Your current vote will appear in the "**Vote**" column.



Start (ET) ▼	ePoll Name	Question	Document	End (ET)	Votes [A/D/-]	Vote	Actions
25-Jul-2011 10:24:16	Preliminary ballot on Draft 1	Is this document ready to move forward?	TEST.zip		1/1/0	Approve	Edit, Close, Vote, Status
25-Jul-2011 09:08:37	This is a Poll	Is the sky blue?	TEST.pdf	31-Jul-2011 23:59:59	2/0/0	Approve	Edit, Close, Vote, Status

2. Confirm your affiliation (this field will be pre-filled with your affiliation selection in myProject™).
3. Select your vote and click "**OK**".

## 6 Viewing Votes and Comments

### Applicable Users:

All Users

### Note:

- Comments and votes are only visible by the commenter and group officers/admins unless "**allow members to view status...**" has been checked.

### Instructions:

1. From the main ePolls screen, click "**Status**" next to the poll you would like to see details from.



Start (ET) ▼	ePoll Name	Question	Document	End (ET)	Votes [A/D/-]	Vote	Actions
25-Jul-2011 10:24:16	Preliminary ballot on Draft 1	Is this document ready to move forward?	TEST.zip		1/1/0	Approve	Edit, Close, Vote, Status
25-Jul-2011 09:08:37	This is a Poll	Is the sky blue?	TEST.pdf	31-Jul-2011 23:59:59	2/0/0	Approve	Edit, Close, Vote, Status

2. From this screen you can see the vote totals, details of all the votes made and all of the comments made for the poll.

**ePoll Status** Vote spre

**Initiator:** Lynn Grande

**ePoll Name:** Preliminary ballot on Draft 1

**Question:** Is this document ready to move forward?

**Type:** One vote per user

**Document:** /Polls/TEST.zip

**Start (ET):** 25-Jul-2011 10:24:16

**End (ET):** open

**Approve:** 1

**Disapprove:** 1

**Abstain:** 0

**Votes:**

Date ▲	Vote	Email
25-Jul-2011	Disapprove	David Chester
25-Jul-2011	Approve	Lynn Grande

**Comments:**

Name	Comment ▲	Category	Page Number	Subclause	Line Number	Proposed Change	Must Be Satisfied
David Chester	Add clarification.	General	6	12	35	The widget is round.	Yes

[Vote spreadsheet](#) | [Comment spreadsheet](#) | [ePolls](#)

## 6.1 Downloading Comments and Votes

### **Applicable Users:**

All Users

### **\*Entity ePoll\*:**

For entity polls, only the name of the entity will show up next to the vote. Comments will be accompanied by the individual's name as well as their affiliation.

### **Instructions:**

1. From the main ePolls screen, click "**Status**" next to the poll you would like to see details from.
2. While viewing the ePoll status, click "**Vote spreadsheet**" or "**Comment spreadsheet**" to download a .csv file containing all of the votes or comments. Votes and comments are handled separately, so there are two separate spreadsheets.

**ePoll Status** Vote spre

**Initiator:** Lynn Grande

**ePoll Name:** Preliminary ballot on Draft 1

**Question:** Is this document ready to move forward?

**Type:** One vote per user

**Document:** /Polls/TEST.zip

**Start (ET):** 25-Jul-2011 10:24:16

**End (ET):** open

**Approve:** 1

**Disapprove:** 1

**Abstain:** 0

Votes:	Date ▲	Vote	Email
	25-Jul-2011	Disapprove	David Chester
	25-Jul-2011	Approve	Lynn Grande

**Comments:**

Name	Comment ▲
David Chester	add clarification.

[Vote spreadsheet](#) | [Comment spreadsheet](#) | [ePolls](#)

Category	Page Number	Subclause	Line Number	Proposed Change	Must Be Satisfied
General	6	12	35	The widget is round.	Yes

## 6.2 Viewing an ePoll Summary

The ePoll summary allows you to view all of the votes cast for all polls in a specified date range.

### Applicable Users:

Officers/Admins, Staff

### \*Entity ePoll\*:

If both the DR and DRA vote in an entity poll, all votes will show up in the ePoll summary, not just the DR. This is a summary of votes by the individual, and will not reflect the poll type.

### Instructions:

1. From the main ePolls screen, click "ePoll Summary".

IEEE mentor

25-Jul-2011 11:15:30 ET

[New ePoll](#) | [Closed ePolls](#) | [ePoll Summary](#)

Start (ET) ▼	ePoll Name	Question	Document	End (ET)	Votes [A/D/-]	Vote	Actions
25-Jul-2011 10:24:16	Preliminary ballot on Draft 1	Is this document ready to move forward?	TEST.zip		1/1/0	Approve	<a href="#">Edit</a> , <a href="#">Close</a> , <a href="#">Vote</a> , <a href="#">Status</a>
25-Jul-2011 09:08:37	This is a Poll	Is the sky blue?	TEST.pdf	31-Jul-2011 23:59:59	2/0/0	Approve	<a href="#">Edit</a> , <a href="#">Close</a> , <a href="#">Vote</a> , <a href="#">Status</a>

[New ePoll](#) | [Closed ePolls](#) | [ePoll Summary](#)

2. On the next screen, you can see all users who have voted on polls in the specified date range along with their vote in each poll.
3. To change the date range, change the dates in the "Start Date" and "End Date" boxes and click "OK".
4. To search for a particular user, type their name (or part of their name) in the "Search" box and click "OK".

Group for Testing ePoll Summary

Start Date:

End Date:

Search:

Name ▲	Affiliation	Test 2 26-Jul-2011	Poll 2 25-Jul-2011	Poll 1 25-Jul-2011
Chester, David				Disapprove
Grande, Lynn		Disapprove	Approve	Approve
Mitola, Joseph		Approve	Approve	Approve

[Open ePolls](#) | [Export ePoll summary](#)

- To export a version of this page that can be viewed in any spreadsheet program, click **"Export ePoll summary"** to download a .csv file.

Group for Testing ePoll Summary

Start Date:

End Date:

Search:

Name ▲	Affiliation	Test 2 26-Jul-2011	Poll 2 25-Jul-2011	Poll 1 25-Jul-2011
Chester, David				Disapprove
Grande, Lynn		Disapprove	Approve	Approve
Mitola, Joseph		Approve	Approve	Approve

[Open ePolls](#) | [Export ePoll summary](#)

## 7 Closing a Poll

Polls will close automatically at 11:59PM ET on the specified end date. If there was no end date specified or if the poll needs to be ended early, you will need to use the "Close" action.

**Applicable Users:**

Officers/Admins, Staff

**Instructions:**

- From the main ePolls screen, click **"Close"** next to the poll you would like to close.

The screenshot shows the IEEE ePolls interface. At the top left is the IEEE logo and 'mentor ePolls'. At the top right is a search bar and the date '25-Jul-2011 11:15:30 ET'. Below this is a table with columns: Start (ET), ePoll Name, Question, Document, End (ET), Votes [A/D/-], Vote, and Actions. The table contains two rows of poll data. A red arrow points to the 'Close' link in the 'Actions' column of the second row.

Start (ET) ▼	ePoll Name	Question	Document	End (ET)	Votes [A/D/-]	Vote	Actions
25-Jul-2011 10:24:16	Preliminary ballot on Draft 1	Is this document ready to move forward?	TEST.zip		1/1/0	Approve	Edit, Close, Vote, Status
25-Jul-2011 09:08:37	This is a Poll	Is the sky blue?	TEST.pdf	31-Jul-2011 23:59:59	2/0/0	Approve	Edit, Close, Vote, Status

[New ePoll](#) | [Closed ePolls](#) | [ePoll Summary](#)

- Confirm that you would like to close the poll by clicking **"OK"**.
- Closed polls will now show up in the **"Closed ePolls"** section.

## 8 Appendix A: Managing Mentor Groups and User Roles

There are two types of groups that can use mentor, independently connected (IC) groups and working groups. The enrollment and involvement levels of IC groups is handled directly in mentor, but the involvement levels for Working Groups are set by the involvement levels in myProject™.

### 8.1 Managing IC groups

#### 8.1.1 Add a Member

Since IC groups are not connected to myProject™, users will have to be added manually by the group administrator.

#### **Applicable Users:**

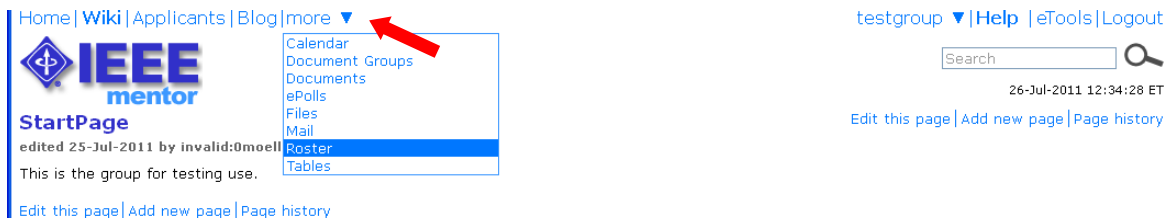
Admins, Staff

#### **Note:**

All users must first set up an IEEE web account in order to be added to the group.

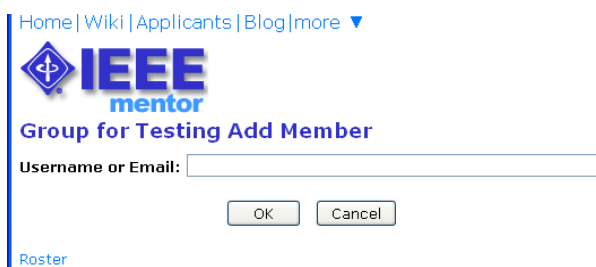
#### **Instructions:**

1. Select your mentor group from the dropdown menu.
2. Click "more" and select "Roster".



The screenshot shows the IEEE Mentor web interface. At the top left, there is a navigation bar with links: Home | Wiki | Applicants | Blog | more. A red arrow points to the 'more' dropdown menu, which is open and shows options: Calendar, Document Groups, Documents, ePolls, Files, Mail, Roster (highlighted in blue), and Tables. Below the navigation bar is the IEEE Mentor logo and the text 'StartPage' and 'edited 25-Jul-2011 by invalid:0moell'. On the right side, there is a search bar and a date '26-Jul-2011 12:34:28 ET'. At the bottom right, there are links: Edit this page | Add new page | Page history.

3. Click "Add Member" and enter the member's IEEE username or email address (if using an email address, this must be the address used to sign up for the IEEE web account).



The screenshot shows the IEEE Mentor web interface. At the top left, there is a navigation bar with links: Home | Wiki | Applicants | Blog | more. Below the navigation bar is the IEEE Mentor logo and the text 'Group for Testing Add Member'. Below that is a form with the label 'Username or Email:' and a text input field. Below the input field are two buttons: 'OK' and 'Cancel'. At the bottom left, there is a link: Roster.

4. Click "OK".



### 8.1.2 Change Involvement Levels

All group involvement levels will be able to vote on ePolls, but only those with Admin access will be able to create polls and see results.

**Applicable Users:**

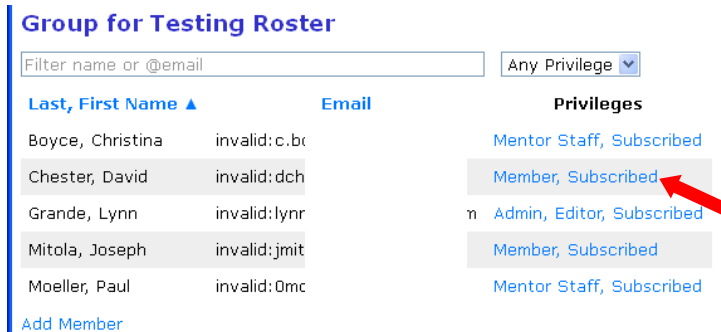
Admins, Staff

**Instructions:**

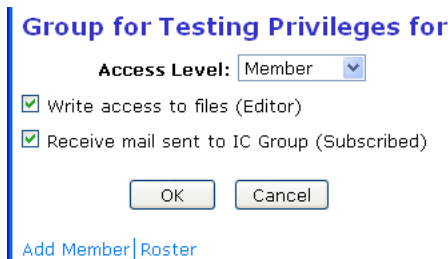
1. Select your mentor group from the dropdown menu.
2. Click "more" and select "Roster".



3. Each user's current privileges will be displayed next to their name. Click on the privileges to change them.



4. Select the user involvement level. "No Access" will delete the user from the group.



5. Click "OK" to save your changes.

## 8.2 Managing Working Groups in myProject™

### 8.2.1 Assign/Change Working Group Officers

**Applicable Users:**

- Sponsor Chair, Standard Representative, Working Group Chair

**Notes:**

- The person you are about to assign this role must sign up in this activity area first and be an IEEE and IEEE-SA member.
- Officers of working groups developing under the entity method must be representatives of Advanced Entity Members.

**Instructions:**

1. On the myProject™ Home Screen, select “manage committees”.
2. Under the “Sponsor Committees” section click “manage” under the “Actions” column.

myProject™ >> Manage Committees

Name	Designator	Contact	Liaison	Roster	Actions
<b>Sponsor Committees</b>					
LAN/MAN Standards Committee	C/LM	Paul Nikolich	Michael Kipness	594	manage
<b>Working Group Committees</b>					
A new working group	C/LM/new group	David Law	Michael Kipness	2	manage
Higher Layer LAN Protocols Working Group	C/LM/WG802.1	Anthony Jeffree	Kathryn Bennett	668	manage
Logical Link Working Group	C/LM/WG802.2	Paul Nikolich	Michael Kipness	60	manage

3. Click “Manage Officer Roster”.

myProject™ >> Manage Committees >> Manage Committee

Back | 1 2 3 4 5 6 7 8 9 10 11 12 13 14 :

Manage C/LM/WG802.3: Ethernet Working Group Working Group

To assign or unassign a user to an officer role, click “Manage Officer Roster” to be taken to the add/delete screen.

To download a printable attendance roster, click “Download Attendance Roster”.

[Manage Officer Roster](#) | [Upload Voter Roster](#) | [Download Roster as CSV](#) | [Download Attendance Roster PDF](#) | [Involvement Levels](#)

URL: <http://www.ieee802.org/3/>

SEARCH

Name ▲	Phone	Employer	Affiliation	Role	Involvement Level
Abbas, Ghani	0	6129 Ericsson AB	Ericsson AB	Aspirant Member	▼
Abbott, John	6	2 Corning Inc.	Corning Inc.	Voting Member	▼
Abbott, Justin				Voting Member	▼
Abdelhalim, Ahmed	4	2 Independent	Independent	Voting Member	▼
Aboulmagd, Osama	6	3 Nortel Networks	Nortel Networks	Aspirant Member	▼
Abraham, Menachem			Columbus Advisors and MultiPhy	Observer	▼

4. Enter the myProject™ usernames of any individuals you would like to assign roles and click “OK”. You can also change or un-assign roles by changing or deleting the username that appears in the box.
5. The next screen will confirm the changes you are making. Click “OK” to save the changes.

## 8.2.2 Assign Involvement Level in a Working Group

The Sponsor Chair, Standard Representative and Working Group Chair have the ability to define the involvement level of those who have enrolled in a committee using myProject™. Involvement levels are used to allow write access to the group's Mentor area.

### Applicable Users:

- Sponsor Chair, Standard Representative, Working Group Chair

### Notes:

- The involvement level set for a person in myProject™ will determine the type of access that person has to the Working Group area in Mentor.
  - If the involvement level is blank, that person will be listed on the Mentor roster as "Interested" and will only have access to public documents in Mentor.
  - Voting members have read/write access to mentor documents and all other involvement levels have access to private content but no read/write ability.
  - The Working Group officers (chair, vice-chair, secretary, etc.) automatically have read/write (admin) access to the working group area in Mentor.

### Instructions:

1. On the myProject™ Home Screen, select "**manage committees**".
2. Under the "**Working Group Committees**" section click "**manage**" under the "**Actions**" column.

myProject™ >> Manage Committees

Name	Designator	Contact	Liaison	Roster	Actions
<b>Sponsor Committees</b>					
LAN/MAN Standards Committee	C/LM	Paul Nikolich	Michael Kipness	594	<a href="#">manage</a>
<b>Working Group Committees</b>					
A new working group	C/LM/new group	David Law	Michael Kipness	2	<a href="#">manage</a>
Higher Layer LAN Protocols Working Group	C/LM/WG802.1	Anthony Jeffrey	Kathryn Bennett	668	<a href="#">manage</a>
Logical Link Working Group	C/LM/WG802.2	Paul Nikolich	Michael Kipness	60	<a href="#">manage</a>

- Under the **"Involvement Level"** column, select the appropriate involvement level for each person from the drop-down box next to his/her name.

myProject™ >> Manage Committees >> Manage Committee Back | 1 2 3 4 5 6 7 8 9 10 11 12 13 14 :

Manage C/LM/WG802.3: Ethernet Working Group Working Group

To assign or unassign a user to an officer role, click "Manage Officer Roster" to be taken to the add/delete screen.

To download a printable attendance roster, click "Download Attendance Roster".

Manage Officer Roster | Upload Voter Roster | Download Roster as CSV | Download Attendance Roster PDF | Involvement Levels  
 URL: <http://www.ieee802.org/3/>

Name ▲	Phone	Employer	Affiliation	Role	Involvement Level
Abbas, Ghani	00	6129 Ericsson AB	Ericsson AB		Aspirant Member ▼
Abbott, John	60	Corning Inc.	Corning Inc.		Voting Member ▼
Abbott, Justin					Voting Member ▼
Abdelhalim, Ahmed	40	Independent	Independent		Voting Member ▼
Aboulmagd, Osama	61	Nortel Networks	Nortel Networks		Aspirant Member ▼
Abraham, Menachem			Columbus Advisors and MultiPhy		Observer ▼

- Click **"UPDATE"** to apply any changes.

### 8.2.3 Select Involvement Levels

These are the involvement levels available to Working Groups:

- **Voting Member** = a voting member
- **Non Voting Member** = a member without voting rights
- **Observer** = someone who attends meeting or gets notices but does not participate
- **Aspirant Member, Nearly Member, Potential Member** = anything the group would like them to mean

Since not all Working Groups use all of these involvement levels, groups have the ability to select the ones they would like to use in myProject™.

#### Applicable Users:

- Sponsor Chair, Standard Representative, Working Group Chair

#### Instructions:

- On the myProject™ Home Screen, select **"manage committees"**.
- Under the **"Working Group Committees"** section click **"manage"** under the **"Actions"** column.

myProject™ >> Manage Committees

Name	Designator	Contact	Liaison	Roster	Actions
<b>Sponsor Committees</b>					
LAN/MAN Standards Committee	C/LM	Paul Nikolich	Michael Kipness	594	manage
<b>Working Group Committees</b>					
A new working group	C/LM/new group	David Law	Michael Kipness	2	manage
Higher Layer LAN Protocols Working Group	C/LM/WG802.1	Anthony Jeffree	Kathryn Bennett	668	manage
Logical Link Working Group	C/LM/WG802.2	Paul Nikolich	Michael Kipness	60	manage

3. Click “**Involvement Levels**”.

myProject™ >> Manage Committees >> **Manage Committee** Back | 1 2 3 4 5 6 7 8 9 10 11 12 13 14 :

Manage C/LM/WG802.3: Ethernet Working Group Working Group

To assign or unassign a user to an officer role, click “Manage Officer Roster” to be taken to the add/delete screen.

To download a printable attendance roster, click “Download Attendance Roster”.

[Manage Officer Roster](#) | 
 [Upload Voter Roster](#) | 
 [Download Roster as CSV](#) | 
 [Download Attendance Roster PDF](#) | 
 **Involvement Levels**  
 URL: <http://www.ieee802.org/3/>

SEARCH

Name ▲	Phone	Employer	Affiliation	Role	Involvement Level
Abbas, Ghani	0	6129 Ericsson AB	Ericsson AB		Aspirant Member ▼
Abbott, John	6	Corning Inc.	Corning Inc.		Voting Member ▼
Abbott, Justin					Voting Member ▼
Abdelhalim, Ahmed	4	Independent	Independent		Voting Member ▼
Aboulmagd, Osama	6	3 Nortel Networks	Nortel Networks		Aspirant Member ▼
Abraham, Menachem			Columbus Advisors and MultiPhy		Observer ▼

4. Click the boxes to place a check next to the levels you would like to use.

myProject™ >> Manage Committees >> Manage Committee >> **Involvement Levels**

Involvement Levels for COM/SC/DYSPAN-P1900.5: Policy Language and Architectures for Managing Cognitive Radio for Dynamic Spectrum Access Applications Working Group

- Aspirant Member
- Nearly Member
- Potential Member
- Voting Member
- Observer
- Non Voting Member

OK
CANCEL

5. Click “**OK**” to save your selection.

## 9 Appendix B: Managing DR and DRA in myProject™

### 9.1 Enroll as DR or DRA (Entity Working Groups)

Participation in Entity Working Groups is limited to IEEE-SA entity members. These entities are represented by a DR (Designated Representative) and DRA (Designated Representative Alternate). Any employee of the entity member institution may enroll as the DR or DRA if the slot has not already been filled. Only the EMR (Entity Member Representative) has the ability to replace the DR or DRA.

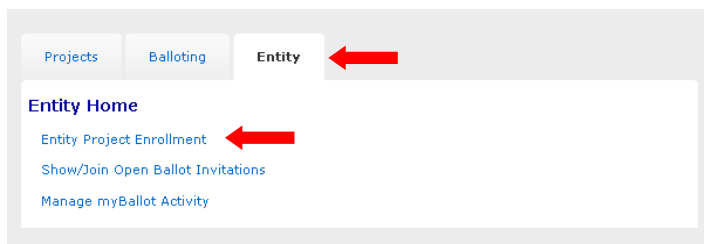
**Applicable Users:** All myProject™ users

**Notes:**

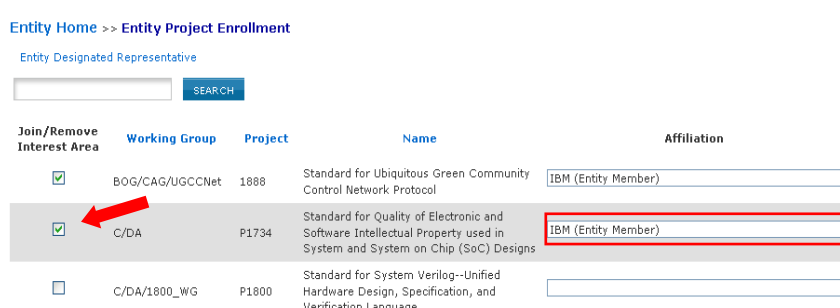
- Users must have an entity member listed as their employer in order to enroll in entity projects.

**Instructions:**

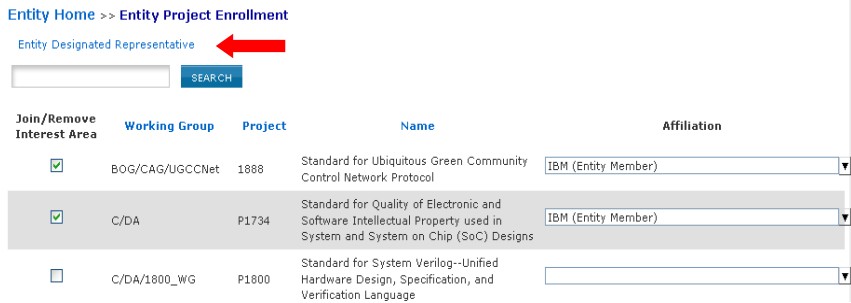
1. On the myProject™ Home Screen, click the "Entity" tab.
2. Click "Entity Project Enrollment".



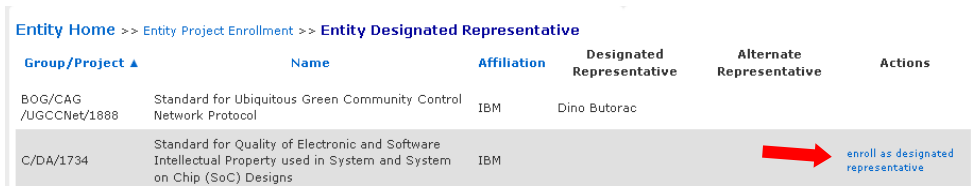
3. Place a check next to the projects you would like to enroll in and enter your company in the "Affiliation" box. Make sure you enter the same entity member company that you have listed as your employer.



4. Click "OK" to confirm enrollment in the project.
5. Click "Entity Designated Representative".



6. Click **“enroll as designated representative”** next to the project you would like to enroll as DR for. (If the DR slot has already been filled, you will be able to select **“enroll as alternate representative”**. If both have been filled, you will be able to select **“add to representative waitlist”** to add your name to a waiting list visible to the EMR.)



7. Click **“OK”** to confirm your enrollment.
8. Your name will now show up under **“Designated Representative”** or **“Alternate Representative”**.

## 9.2 Manage DR and DRA (Entity Working Groups)

Participation in Entity Working Groups is limited to IEEE-SA entity members. These entities are represented by a DR (Designated Representative) and DRA (Designated Representative Alternate). Any employee of the entity member institution may enroll as the DR or DRA if the slot has not already been filled. Only the EMR (Entity Member Representative) has the ability to replace the DR or DRA.

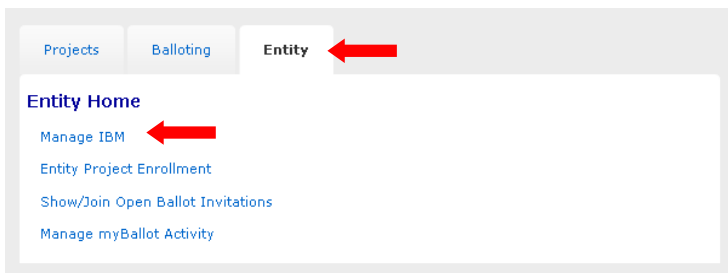
**Applicable Users:** EMR

**Notes:**

- Users must already be enrolled in the entity project to be added as DR or DRA.

**Instructions:**

1. On the **myProject™** Home Screen, click the **“Entity”** tab.
2. Click **“Manage (your company)”**.



3. Click **“manage wg roles”** next to the Working Group you want to manage.

Entity Home >> Entity Projects

IBM

You have access to this screen because of your role as the Entity Member Representative (EMR) for your organization. Below is the list of all active entity standard projects. Under the column "Roles" you will find the name(s) of your entity representatives who have affiliated with your organization, and the role(s), if one is assigned, they hold in each entity project listed. For more information regarding the actions and processes on this screen you can consult the help pages which are available in the header of this page.

Organization Users

Working Group	Project	Name	Roles	Actions
BOG/CAG/UGCCNet	1888	Standard for Ubiquitous Green Community Control Network Protocol	Dino Butorac DR Mark Brown DRA	<a href="#">manage wg roles</a> , <a href="#">manage ballot</a>
C/DA	P1734	Standard for Quality of Electronic and Software Intellectual Property used in System and System on Chip (SoC) Designs	Anne Brinkley DR	<a href="#">manage wg roles</a> , <a href="#">manage ballot</a>
C/DA/1800_WG	P1800	Standard for System Verilog--Unified Hardware Design, Specification, and Verification Language		<a href="#">manage wg roles</a>

4. You will see individuals currently enrolled as the DR and DRA as well as a waiting list of other individuals who have expressed interested in becoming the DR/DRA.
- To remove an individual from a DR/DRA position, delete their username from the box and click **“OK”**
  - To replace an individual in a DR/DRA position, replace their username with the username of the new individual and click **“OK”**
  - You may replace both usernames at the same time or switch the two.
  - You may assign a new DR/DRA, but it is recommended that you let the individual enroll him/herself or use a name from the waiting list to ensure they have already enrolled in the project.

Entity Home >> Entity Projects >> Manage WG Roles

IBM

**BOG/CAG/UGCCNet** Ubiquitous Green Community Control Network Working Group

As the Entity Member Representative (EMR) for your organization, an advanced member, you have the ability to assign/modify the Designated Representative (DR) and Designated Representative Alternate (DRA) roles for corporate standard projects at any time. For more information about the DR/DRA roles and other actions available on this page, please consult the help pages available in the header of this page.

**DESIGNATED REPRESENTATIVE:**  Dino Butorac

**DESIGNATED REPRESENTATIVE ALTERNATE:**  Mark Brown

**Designated Representative Wait-list**

Date Requested	Name	Username	Email Address
07/29/2011 09:16	Brinkley, Anne	ANNEBB	invalid:annebb@us.ibm.com