Mentor

User Guide

Edited Sept 22, 2011

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1 Introduction

Mentor is:

- A tool that includes several features to help groups collaborate and share information. Features include:
  - Documents – A repository for public and private document files
  - Wiki – An easy way to create web pages and link to content both within and outside of Mentor
  - ePolls – A tool that gives groups the ability to conduct ballots and gather comments
  - Calendar – A shared calendar with iCal download capabilities
  - Mail – A simple way to send email to your entire group
- Integrated with rosters in myProject™
  - Maintain your Working Group involvement levels in one place.

In order to use Mentor, you must have:

- Access to the internet
- A web browser (e.g. Internet Explorer, Firefox, etc.)
- A PDF viewer (e.g. Adobe Reader)
- A spreadsheet editor ***only for download/upload comment functions*** (e.g. Excel)
- An IEEE web account
  - IEEE Web Accounts are free and do not require IEEE membership.
  - If you do not have an IEEE web account, create one by going to: http://www.ieee.org/go/create_web_account

2 Getting Started

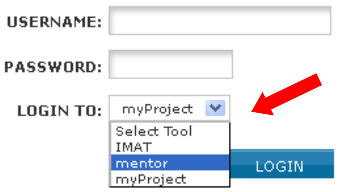
2.1 Logging In

Applicable Users:

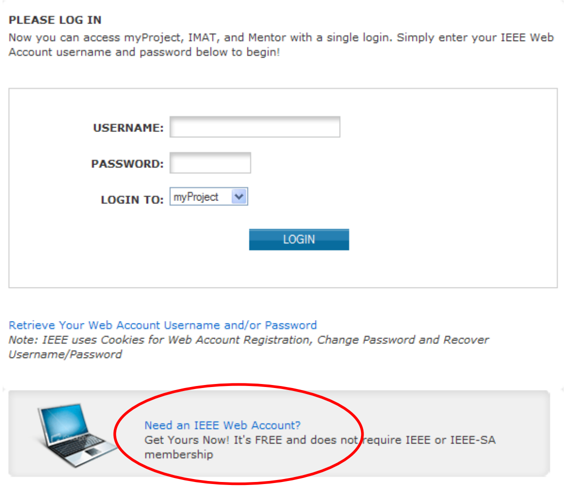
- All Users

Instructions:

1. Go to https://development.standards.ieee.org/my-site
2. Select "**Mentor**" from the "LOGIN TO" dropdown menu.



3. Enter your IEEE Web Account username and password and click "**LOGIN**".
   - If you do not have an IEEE web account, you can create one by clicking on the "**Need an IEE Web Account?**" link.



2.2 Navigating Mentor

Applicable Users:

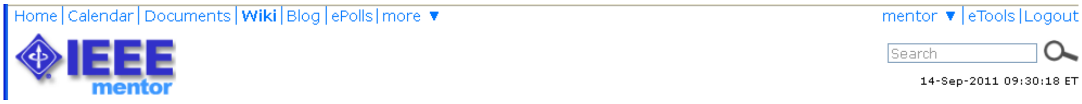
- All Users

Notes:

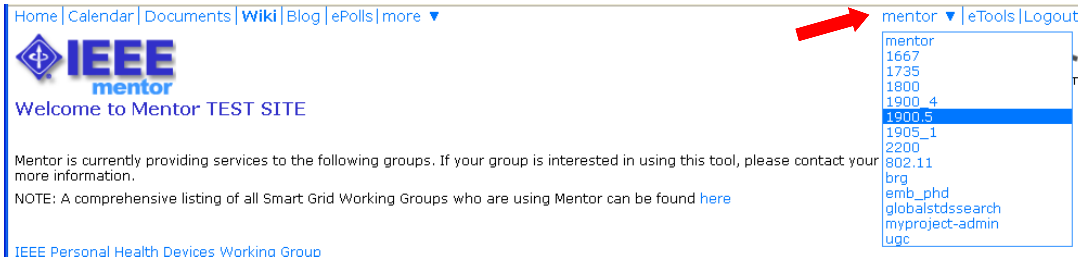
- Mentor menu options will not look alike for all users. Options will depend on what the group has available and on your personal involvement level.

Instructions:

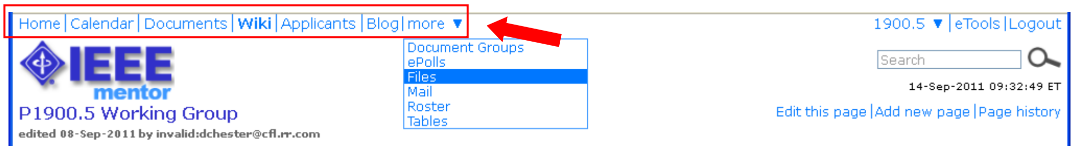
1. After logging in, you will be brought to the main mentor screen. Your options on this screen will depend on the groups you are involved in and your individual privileges.



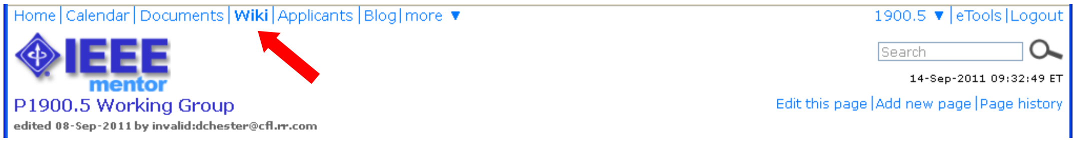
2. Click the "mentor" dropdown menu to navigate to any Mentor group that you are involved in.



3. In the top left part of the screen, you will see all of the group features that you have access to. Clicking on the "more" dropdown menu will show additional options.



4. Click on any of the features to access it. The feature you are currently using will appear in **bold**.



3 Managing Mentor Groups and User Roles

There are two types of groups that can use Mentor, independently connected (IC) groups and IEEE-SA Working Groups. The primary difference between the two types of groups is their setup and management. Enrollment and involvement levels of IC groups are handled directly in Mentor, while involvement levels for Working Groups are set by the involvement levels in myProject™.

3.1 Managing IC groups

3.1.1 Add a Member

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

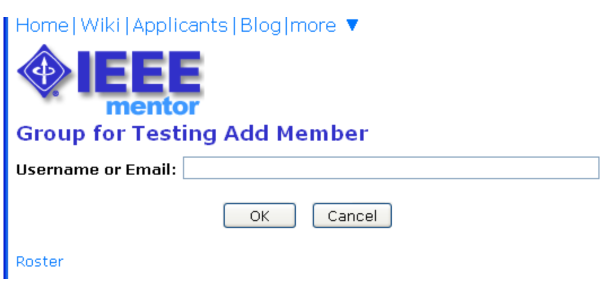
Applicable Users:
Admins, Mentor Staff

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".

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).



4. Click "OK".

3.1.2 Change Involvement Levels

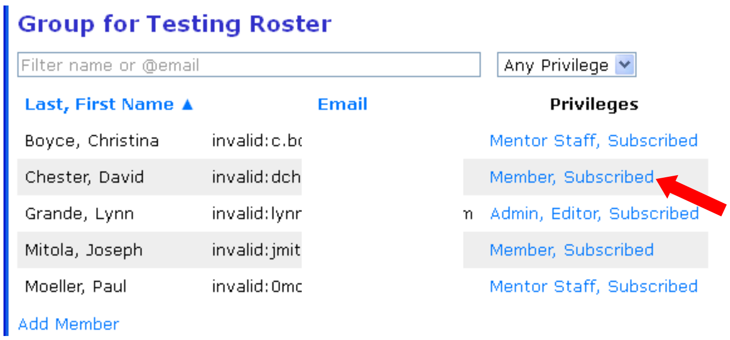
All group involvement levels will be able to vote on ePolls, but only those with Admin access will be able to create polls and see results.

Applicable Users:
Admins, Mentor Staff

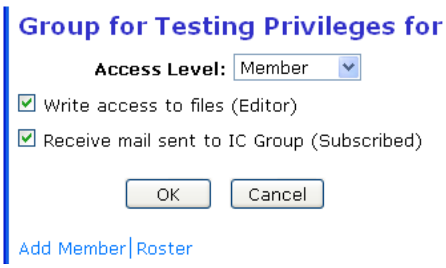
Instructions:

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.

3.2 Managing Working Groups in myProject™

3.2.1 Assign/Change Working Group Officers

Refer to myProject™ User Guide
https://mentor.ieee.org/etools_documentation/dcn/11/etools_documentation-11-0014-MYPR-myproject-user-guide.pdf#Assign_Change_Working_Group_Off

3.2.2 Assign Involvement Level in a Working Group

Refer to myProject™ User Guide
https://mentor.ieee.org/etools_documentation/dcn/11/etools_documentation-11-0014-MYPR-myproject-user-guide.pdf#Assign_Involvement_Level_in_a_W

3.2.3 Select Involvement Levels

Refer to myProject™ User Guide
https://mentor.ieee.org/etools_documentation/dcn/11/etools_documentation-11-0014-MYPR-myproject-user-guide.pdf#Select_Involvement_Levels

3.3 Changing Privileges

Editor access (write access to the Wiki and Files areas) and mail subscriptions are privileges that can be assigned regardless of involvement level in the group.

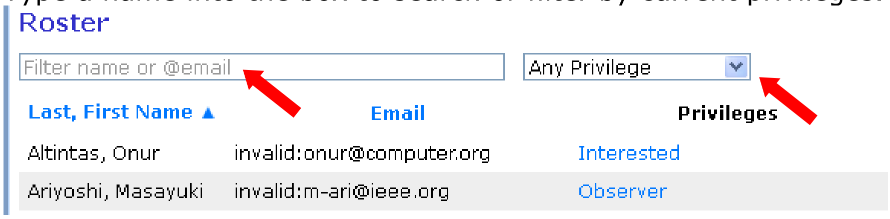
Applicable Users:

- Officer, Admin, Staff Liaison, Mentor Staff

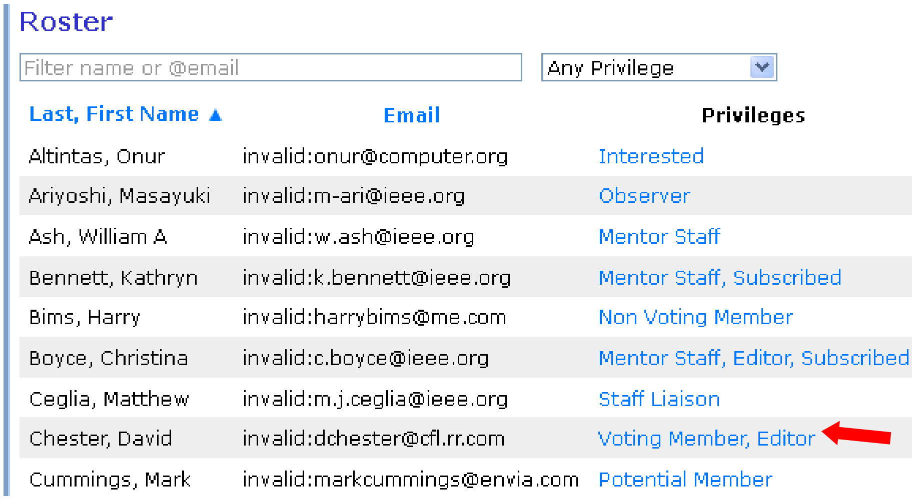
Instructions:

1. Select your Mentor group from the dropdown menu.
2. From your group's Mentor area, click "**roster**" in the top left corner. If you don't see "**Roster**", click the "**more**" dropdown menu and select "**Roster**".

3. Type a name into the box to search or filter by current privileges.



4. Click on the current privileges to access the privileges menu.



Roster

Filter name or @email | Any Privilege

Last, First Name ▲	Email	Privileges
Altintas, Onur	invalid:onur@computer.org	Interested
Ariyoshi, Masayuki	invalid:m-ari@ieee.org	Observer
Ash, William A	invalid:w.ash@ieee.org	Mentor Staff
Bennett, Kathryn	invalid:k.bennett@ieee.org	Mentor Staff, Subscribed
Bims, Harry	invalid:harrybims@me.com	Non Voting Member
Boyce, Christina	invalid:c.boyce@ieee.org	Mentor Staff, Editor, Subscribed
Ceglia, Matthew	invalid:m.j.ceglia@ieee.org	Staff Liaison
Chester, David	invalid:dchester@cfl.rr.com	Voting Member, Editor
Cummings, Mark	invalid:markcummings@envia.com	Potential Member

5. Place a check next to "**subscribed**" or "**editor**" to grant the privileges to that individual.

6. Click "**OK**" to save the changes.

3.4 Staff User Roles

Only some staff roles assigned in myProject provide staff privileges in Mentor. Other staff users must add a group to their activity profile and become "interested". Working Group officers must assign the staff user another involvement level to grant additional access to a mentor group.

When staff users are added to IC groups, they will default to "Member". Any IC group admin can change the user's access level to "Admin", "Guest" or "No Access". Users with ODB Staff privileges will always be added as "Mentor Staff".

Staff User Roles in myProject™ with staff privileges in Mentor:

ODB Staff – When added to a mentor group, these users automatically become "Mentor Staff". These are administrative users with the ability to enable committees, create IC groups, manage features, as well as all Officer/Admin capabilities.

Staff Liaison – If a staff user is assigned as a Staff Liaison for a Working Group in myProject™, they will appear as "Staff Liaison" in that group's Mentor roster. The Staff Liaison will have the same capabilities as an Officer.

CSM – If a staff user is assigned as a CSM (Client Services Manager) for a Working Group in myProject™, they will appear as "Officer" in that group's Mentor roster.

4 Documents

The Mentor documents feature allows groups to have a repository for private and publically accessible documents.

4.1 Managing User Access

Access to documents in Mentor depends on the involvement level of the user. The privileges associated with involvement levels are as follows:

Table 1

Involvement Level	Can view public documents?	Can view private documents?	Can post new documents and revisions?	Can delete and correct documents?
Interested	Yes	No	No	No
Observer	Yes	Yes	No*	No
Potential Member	Yes	Yes	No*	No
Aspirant Member	Yes	Yes	No*	No
Nearly Member	Yes	Yes	No*	No
Non-Voting Member	Yes	Yes	No*	No
Guest (IC Groups)	Yes	Yes	No*	No
Voting Member	Yes	Yes	Yes	No
Member (IC Groups)	Yes	Yes	Yes	No
Working Group Officer	Yes	Yes	Yes	Yes
Admin (IC groups)	Yes	Yes	Yes	Yes
Mentor Staff	Yes	Yes	Yes	Yes
Staff Liaison	Yes	Yes	Yes	Yes

*Individuals will be able to post documents and revisions if the group has had the "Documents may be added or revised by any involvement level" feature enabled.

For more information on assigning involvement levels, see **Sec. 2**

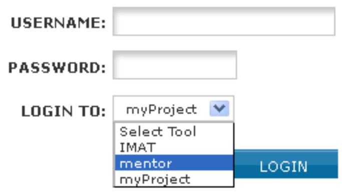
Logging In

Applicable Users:

- All Users

<u>Instructions:</u>

4. Go to https://development.standards.ieee.org/my-site
5. Select "**Mentor**" from the "LOGIN TO" dropdown menu.



6. Enter your IEEE Web Account username and password and click "**LOGIN**".

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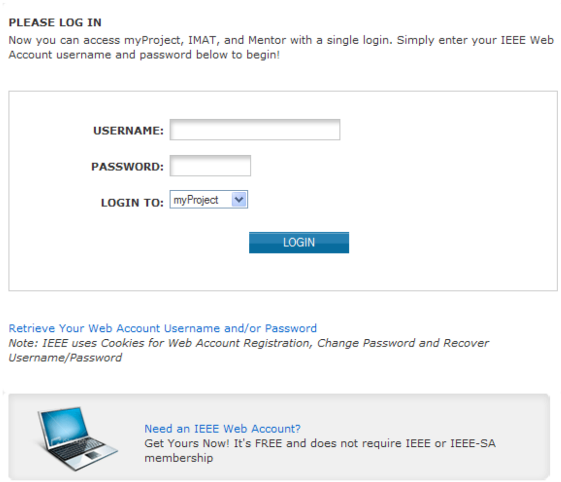


4.2 Navigating Mentor

Applicable Users:

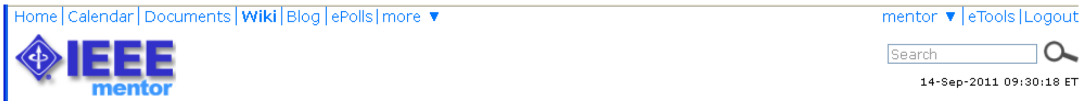
- All Users

Notes:

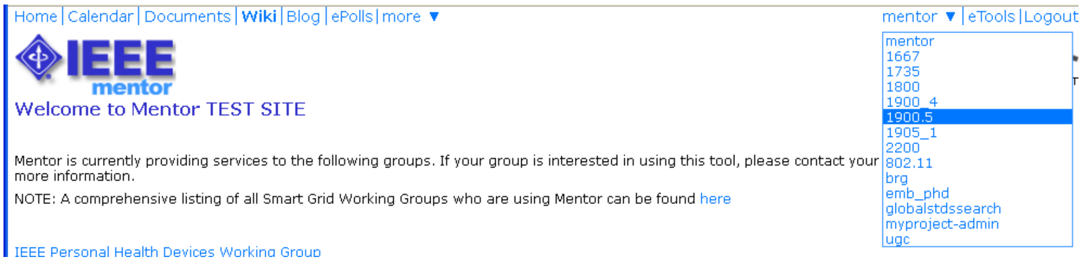
- Mentor menu options will not look alike for all users. Options will depend on what the group has available and on your personal involvement level.

Instructions:

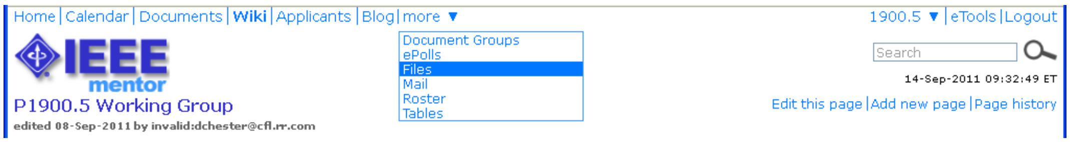
5. After logging in, you will be brought to the main mentor screen. Your options on this screen will depend on the groups you are involved in and your individual privileges.



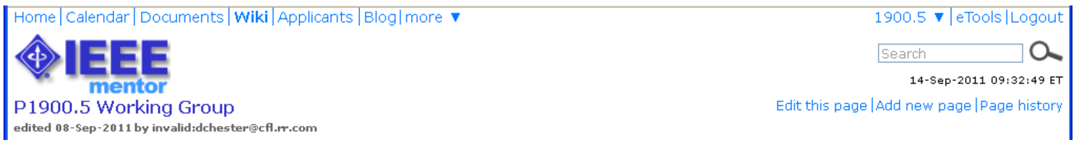
6. Click the "mentor" dropdown menu to navigate to any Mentor group that you are involved in.



7. In the top left part of the screen, you will see all of the group features that you have access to. Clicking on the "more" dropdown menu will show additional options.



8. Click on any of the features to access it. The feature you are currently using will appear in **bold**.



Managing Mentor Groups and User Roles.

4.3 Creating and Managing Document Groups

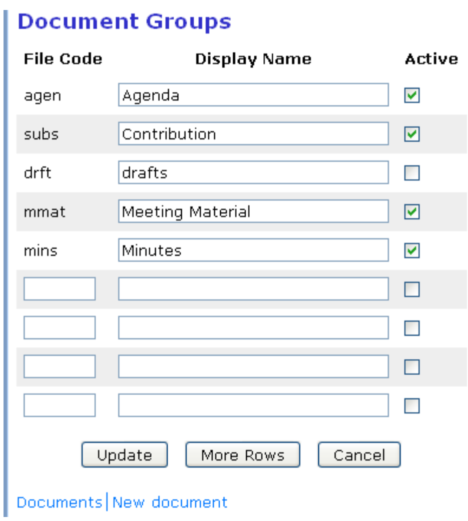
In order to use the documents area in Mentor, you must first set up document groups. These groups are used as categories for your documents and users can filter documents according to categories.

Applicable Users:

- Officer, Admin, Staff Liaison, Mentor Staff

Instructions:

1. From your group's Mentor area, click "**Document Groups**" in the top left corner. If you don't see "**Document Groups**", click the "**more**" dropdown menu and select "**Document Groups**".
2. In the box under "File Code", enter a four character abbreviation for the group name.
3. In the box under "Display Name", enter the name for the name for the group.
4. Click "**Update**" to save your changes.
5. Click "**More Rows**" if you need more rows for additional document groups.
6. You may change the "Display Name" at any time, but you may not change the "File Code" or delete a group.
7. Check the box under "Active" to deactivate the group. This will prevent new documents from being uploaded to the group, but users will still be able to view documents and post revisions.



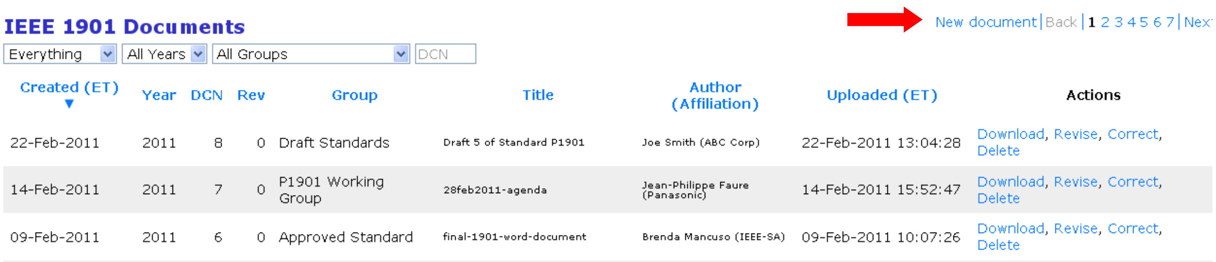
4.4 Uploading a New Document

<u>Applicable Users:</u>

- All users with appropriate access (See **Table 1**)

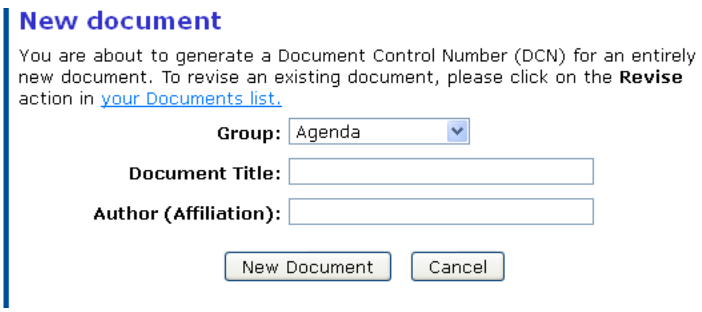
<u>Instructions:</u>

1. From your group's Mentor area, click "**Documents**" in the top left corner. If you don't see "**Documents**", click the "**more**" dropdown menu and select "**Documents**".
2. Click "**New Document**".

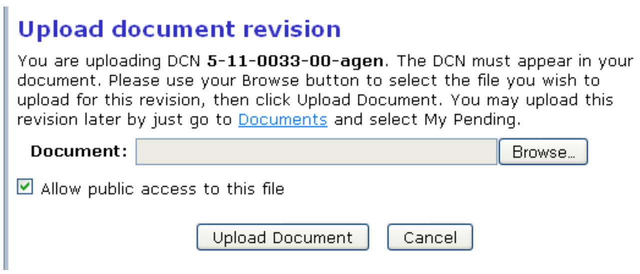


Created (ET)	Year	DCN	Rev	Group	Title	Author (Affiliation)	Uploaded (ET)	Actions
22-Feb-2011	2011	8	0	Draft Standards	Draft 5 of Standard P1901	Joe Smith (ABC Corp)	22-Feb-2011 13:04:28	Download, Revise, Correct, Delete
14-Feb-2011	2011	7	0	P1901 Working Group	28feb2011-agenda	Jean-Philippe Faure (Panasonic)	14-Feb-2011 15:52:47	Download, Revise, Correct, Delete
09-Feb-2011	2011	6	0	Approved Standard	final-1901-word-document	Brenda Mancuso (IEEE-SA)	09-Feb-2011 10:07:26	Download, Revise, Correct, Delete

3. Choose a document group for the document from the "**Group**" dropdown menu.
4. Enter a title for the document
5. Enter an author and/or affiliation. This will display next to the document title in the list.
6. Click "**New Document**" to create the document entry.

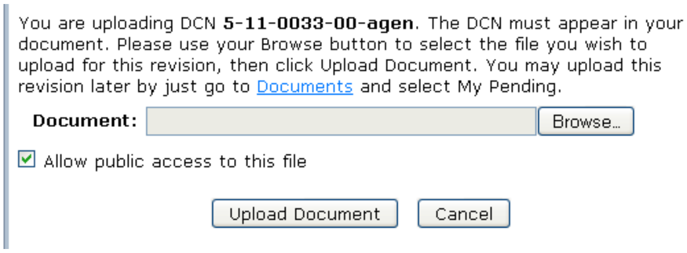


7. Click "**Browse...**" and select the document file you would like to upload. There are no restrictions on the type of documents you can upload.
8. If your group allows public access to files, check "**Allow public access to this file**" to allow public access to this document.
9. Click "**Upload Document**" to upload the file.



4.5 What is a DCN?

DCN is the **D**ocument **C**ontrol **N**umber. The full DCN includes some additional information about the document file and will be visible before uploading a document.



In this case the DCN is **5-11-0033-00-agen**. This comes from:
5 = The Mentor group link name (shortened form of 1900.5)
11 = The year (2011)
0033 = The document number (33)
00 = The revision number (this is the original, so revision is 0)
Agen = The file code for the document group (Agenda)

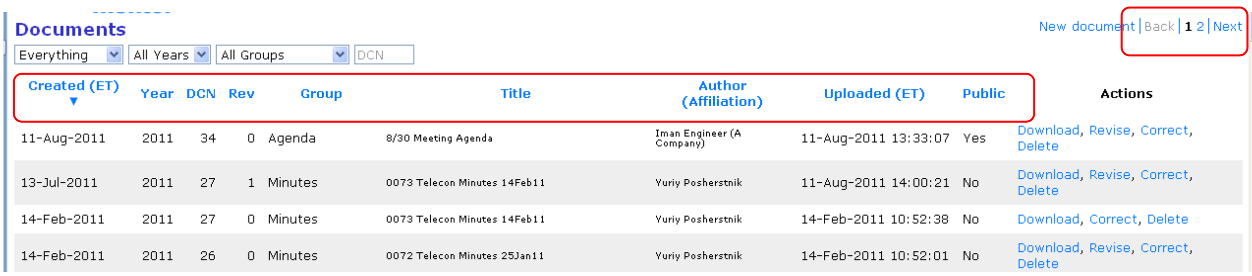
4.6 Downloading a Document

Applicable Users:

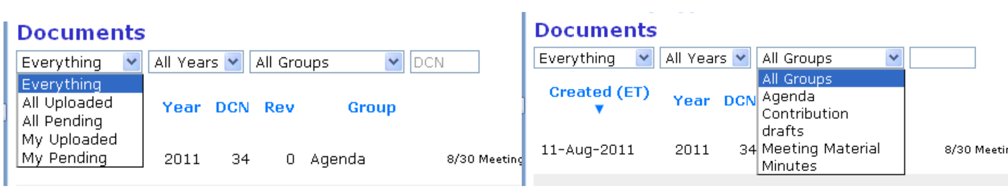
- All users with appropriate access (See **Table 1**)

Instructions:

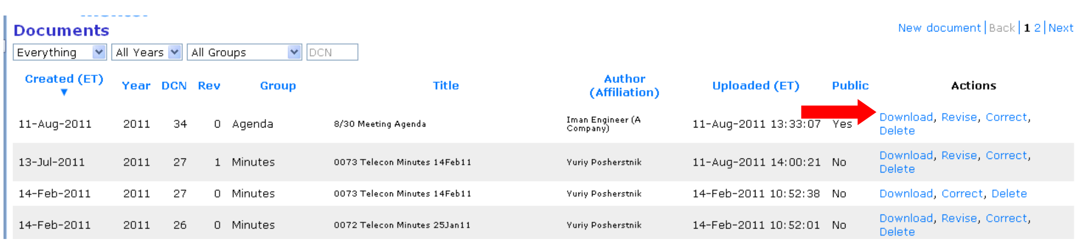
1. From your group's Mentor area, click "**Documents**" in the top left corner. If you don't see "**Documents**", click the "**more**" dropdown menu and select "**Documents**".
2. Click any of the column headings to sort the document list and click the page number or "**Next**" to view additional documents.



3. Filter the documents by year, group, and other parameters.



4. Click "**Download**" to download a file or right-click "**Download**" and select "save link as" or "save target as" to save the file to a particular location.



4.7 Creating a Link to a Document

Links can be accessed by anyone and can be placed on Mentor wiki pages, external websites, in emails and in documents. If your group allows public access to files, it is not necessary for users to log into Mentor in order to view those files. Links to private documents will also work, but users will be prompted for a username and password. Users will only be able to see the file if they are authorized to do so.

Applicable Users:

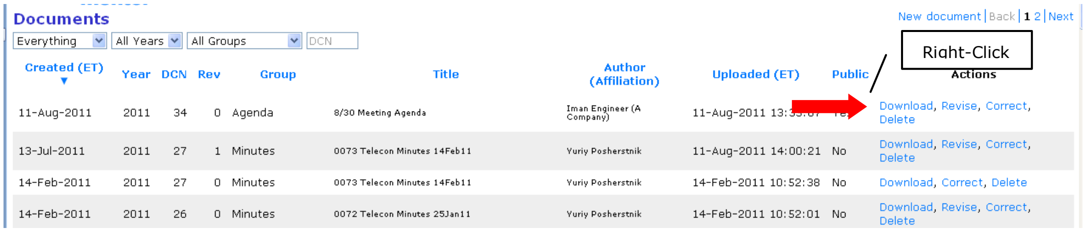
- All users with appropriate access (See **Table 1**)

Notes:

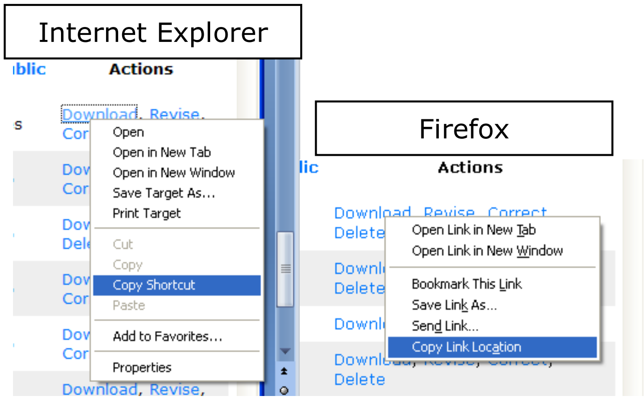
- You must check "**Allow public access to this file**" when uploading the document in order to allow users to access files without login.
- Links will access the revision from the link, not necessarily the latest version. To create a link that accesses the latest revision automatically, see **Step 0**

Instructions:

1. From your group's Mentor area, click "**Documents**" in the top left corner. If you don't see "**Documents**", click the "**more**" dropdown menu and select "**Documents**".
2. Right-click "**Download**" next to the file you would like to link to.



3. In Internet Explorer, select "**Copy Shortcut**" or in Firefox, select "**Copy Link Location**".



4. Paste the link into your document, email, etc.

5. If you want to create a link that accesses the latest revision automatically, you will need to delete the revision number from the link.
    - Locate the revision number from the DCN portion of the link.
    - See **Sec 4.5 What is a DCN?** to identify the revision number.
    - Remove the revision number and extra dashes.
    - Example: *(http://Mentor.ieee.org/etools_documentation/dcn/11/etools_documentation-11-0014-00-MYPR-myproject-user-guide.pdf)* would be changed to *(http://Mentor.ieee.org/etools_documentation/dcn/11/etools_documentation-11-0014-MYPR-myproject-user-guide.pdf)*

4.8 Revising a Document

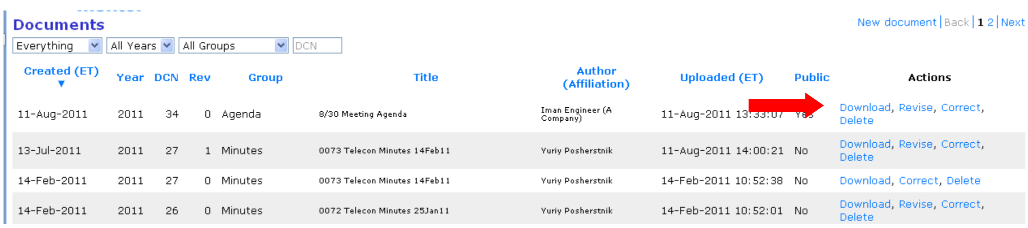
Mentor allows users with the appropriate access to post revisions to documents. Revisions do not overwrite the original document, but have the same name and document number. They appear along with the original in the document list with a separate revision number. Revisions have a unique URL and will not show up in place of the original if a revision is linked to directly.

Applicable Users:

- All users with appropriate access (See **Table 1**)

Instructions:

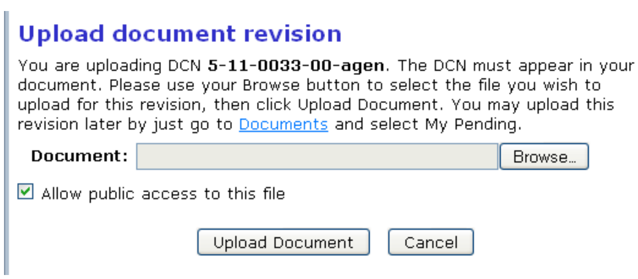
1. From your group's Mentor area, click "**Documents**" in the top left corner. If you don't see "**Documents**", click the "**more**" dropdown menu and select "**Documents**".
2. Click "**Revise**" next to the document you would like to post a revision to.



Created (ET)	Year	DCN	Rev	Group	Title	Author (Affiliation)	Uploaded (ET)	Public	Actions
11-Aug-2011	2011	34	0	Agenda	8/30 Meeting Agenda	Iman Engineer (A Company)	11-Aug-2011 13:33:07	Yes	Download, Revise, Correct, Delete
13-Jul-2011	2011	27	1	Minutes	0073 Telecon Minutes 14Feb11	Yuriy Posherstnik	11-Aug-2011 14:00:21	No	Download, Revise, Correct, Delete
14-Feb-2011	2011	27	0	Minutes	0073 Telecon Minutes 14Feb11	Yuriy Posherstnik	14-Feb-2011 10:52:38	No	Download, Correct, Delete
14-Feb-2011	2011	26	0	Minutes	0072 Telecon Minutes 25Jan11	Yuriy Posherstnik	14-Feb-2011 10:52:01	No	Download, Revise, Correct, Delete

3. Enter a new Author and affiliation, if it is different, and click "**Revise Document**".

4. Click "**Browse…**" and select the document file you would like to upload.
5. If your group allows public access to files, check "**Allow public access to this file**" to allow public access to this document.
6. Click "**Upload Document**" to upload the file.



4.9 Correcting a Document

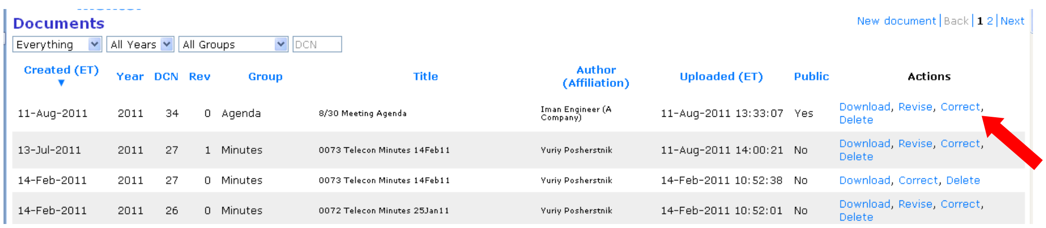
The correct feature can be used to change the displayed name of a document, change the author, change public access or replace the document file. This option does not alter the file name or URL.

Applicable Users:

- Officer, Admin, Staff Liaison, Mentor Staff

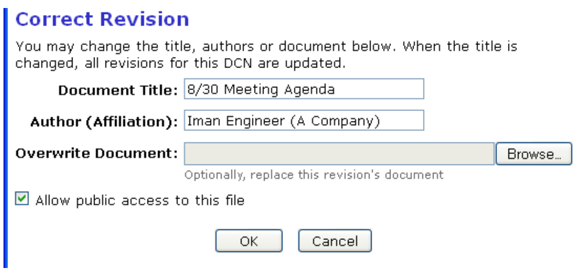
Instructions:

1. From your group's Mentor area, click "**Documents**" in the top left corner. If you don't see "**Documents**", click the "**more**" dropdown menu and select "**Documents**".
2. Click "**Correct**" next to the document you would like to change.



Created (ET)	Year	DCN	Rev	Group	Title	Author (Affiliation)	Uploaded (ET)	Public	Actions
11-Aug-2011	2011	34	0	Agenda	8/30 Meeting Agenda	Iman Engineer (A Company)	11-Aug-2011 13:33:07	Yes	Download, Revise, Correct, Delete
13-Jul-2011	2011	27	1	Minutes	0073 Telecon Minutes 14Feb11	Yuriy Posherstnik	11-Aug-2011 14:00:21	No	Download, Revise, Correct, Delete
14-Feb-2011	2011	27	0	Minutes	0073 Telecon Minutes 14Feb11	Yuriy Posherstnik	14-Feb-2011 10:52:38	No	Download, Correct, Delete
14-Feb-2011	2011	26	0	Minutes	0072 Telecon Minutes 25Jan11	Yuriy Posherstnik	14-Feb-2011 10:52:01	No	Download, Revise, Correct, Delete

3. Make any necessary changes to the title, author, or public access.
4. If you would like to overwrite the file, click "**Browse…**" and select the document file you would like to upload.



5. Click "**OK**" to save any changes and/or upload the new file.

4.10 Deleting a Document

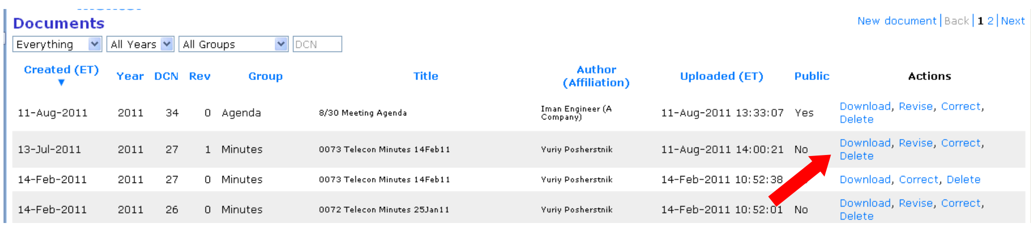
Deleting a document will delete the file associated with the document. Deleting the document a second time will delete the entire entry.

Applicable Users:

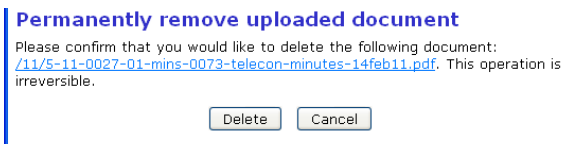
- Officer, Admin, Staff Liaison, Mentor Staff

Instructions:

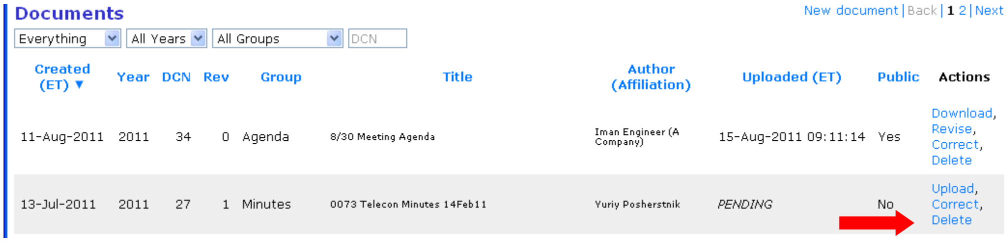
1. From your group's Mentor area, click "**Documents**" in the top left corner. If you don't see "**Documents**", click the "**more**" dropdown menu and select "**Documents**".
2. Click "**Delete**" next to the document you would like to delete.



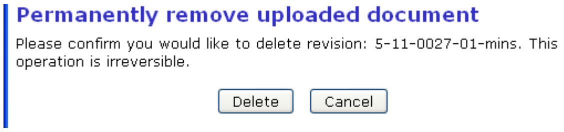
3. Click "**Delete**" to confirm the deletion of the document file.



4. You will now see "PENDING" under the "Uploaded" column because there is no longer a file associated with this document. To delete the document entry, click "**Delete**" next to the document.



5. Click "**Delete**" to confirm the deletion of the document file.



5 Files

The files section of Mentor allows folder based file access to files in Mentor. All document files and wiki pages are located in these folders and additional files can be placed here as well.

5.1 Accessing the files Area

Applicable Users:

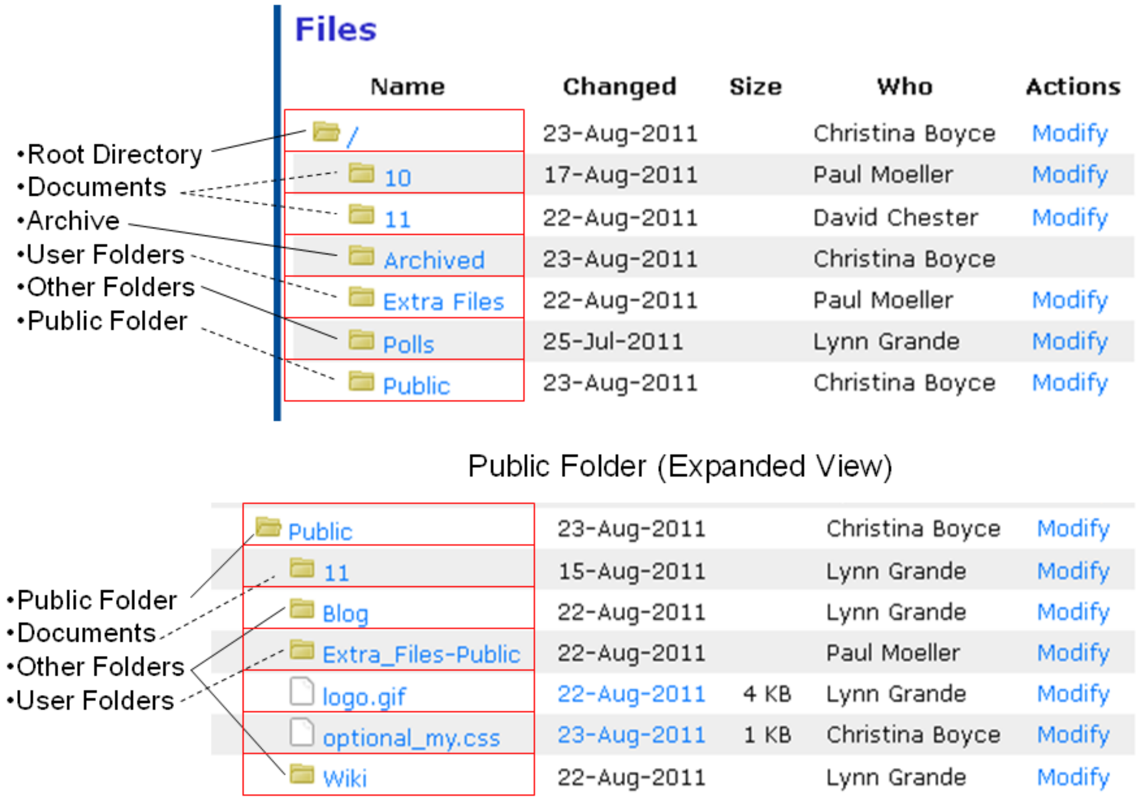
- Any users with "Editor" access, Officer, Admin, Staff Liaison, Mentor Staff

Instructions:

1. From your group's Mentor area, click "**Files**" in the top left corner. If you don't see "**Files**", click the "**more**" dropdown menu and select "**Files**".

5.2 Overview

When you first access the files area, you will see a file directory tree similar to what you would see on your computer. Some of the folders are created automatically by Mentor, but you have the ability to create other folders and upload additional files. Individuals with involvement levels other than "interested" will be able to see the files area, but only officers/administrators and individuals who have been given "editor" abilities will be able to modify files and folders.



Root Directory – This is the main folder for the group's Mentor area. All files and folders are stored within this folder.
Documents – Documents uploaded using the "documents" section will automatically be stored in folders named for the year (2011 = 11). Private documents will be located in folders within the root directory, while public documents will be located in folders within the "Public" folder.
Archive – All deleted items will reside here.
User Folders – Individuals with appropriate access can create additional folders and upload files to them. These folders can be named by the creator.
Other Folders – Mentor will create additional folders for content related to Mentor features. These folders include: Polls, Blog, Wiki.
Public Folder – This folder contains all of the public content for the Mentor area. All files located in this folder can be accessed without logging into Mentor.

5.3 Navigation

Navigation of the files area works by expanding and collapsing folders. To expand a folder, click on the folder name. To collapse a folder, click the folder name again.

Files

Name	Changed	Size	Who	Actions
/	23-Aug-2011		Christina Boyce	Modify
10	[illegible]7-Aug-2011		Paul Moeller	Modify
11	22-Aug-2011		David Chester	Modify
Archived	23-Aug-2011		Christina Boyce	
Extra Files	22-Aug-2011		Paul Moeller	Modify
Polls	25-Jul-2011		Lynn Grande	Modify
Public	23-Aug-2011		Christina Boyce	Modify

Name	Changed	Size	Who	Actions
/	23-Aug-2011		Christina Boyce	Modify
10	1[illegible]-Aug-2011		Paul Moeller	Modify
11	22-Aug-2011		David Chester	Modify
Archived	23-Aug-2011		Christina Boyce	
10	12-Aug-2010		Yuriy Posherstnik	
11	15-Aug-2011		Lynn Grande	
Project	23-Aug-2011		Christina Boyce	Restore
Public	22-Aug-2011		Lynn Grande	
Extra Files	22-Aug-2011		Paul Moeller	Modify
Polls	25-Jul-2011		Lynn Grande	Modify
Public	23-Aug-2011		Christina Boyce	Modify

5.4 Add/Modify a File or Folder

<u>Applicable Users:</u>

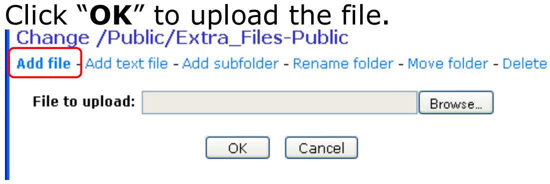
- Any users with "Editor" access, Officer, Admin, Staff Liaison, Mentor Staff

<u>Instructions:</u>

1. Click "**Modify**" next to the folder you would like to add a file or folder to. You can click "**Modify**" for the root directory to place a file or folder there.

<u>To upload a file:</u>

1. The file upload screen will come up automatically. If you are in another screen, click "**Add file**" to bring this screen up.
2. Click "**Browse**…" and select the file you would like to upload.
3. Click "**OK**" to upload the file.

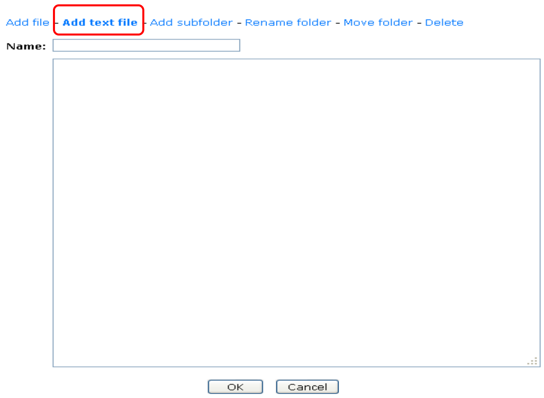


<u>To Create a Folder:</u>

1. Click "**Add subfolder**".
2. Type in the name of the new folder.
3. Click "**OK**" to create the folder.

To Create a Text File:

1. Click "**Add text file**".
2. Type in a name for the text file, making sure to end it in ".txt". *example: filename.txt*
3. Type your desired text into the main box.
4. Click "**OK**" to create the text file.

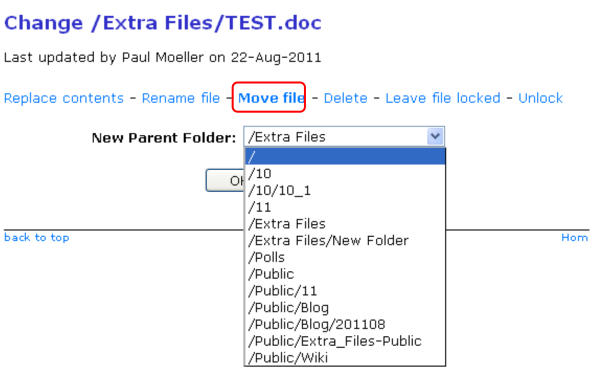


To Rename a File/Folder:

1. Click "**Rename file**"/"**Rename folder**".
2. Type in the new name.
3. Click "**OK**" to rename the file/folder.

To Move a File/Folder:

1. Click "**Move file**"/"**Move folder**".
2. Select the folder you would like to move to. *Select " / " for the root folder.*
3. Click "**OK**" to move the file/folder.



To Delete a File/Folder:

1. Click "**Delete**".
2. Click "**OK**" to delete the file.

5.5 Recover or Permanently Delete a Deleted File or Folder

When files, documents, blog entries, and wiki pages are deleted, they are not permanently gone. These files can be recovered using the "Restore" feature.

Applicable Users:

- Any users with "Editor" access, Officer, Admin, Staff Liaison, Mentor Staff

Instructions:

1. Click on the "**Archived**" folder to expand it.
2. The "Archived" folder will contain folders similar to those in the root directory (including public, documents by year, etc.). Expand the folders to navigate to the file you would like to recover.

Files

Name	Changed	Size	Who	Actions
/	07-Sep-2011		Lynn Grande	Modify
10	17-Aug-2011		Paul Moeller	Modify
11	24-Aug-2011		Christina Boyce	Modify
Archived	23-Aug-2011		Christina Boyce	
10	12-Aug-2010		Yuriy Posherstnik	
11	15-Aug-2011		Lynn Grande	
Project	23-Aug-2011		Christina Boyce	Restore
Public	22-Aug-2011		Lynn Grande	
Extra Files	23-Aug-2011		Christina Boyce	Modify
Polls	25-Jul-2011		Lynn Grande	Modify
Public	24-Aug-2011		Lynn Grande	Modify
Wiki	07-Sep-2011		Lynn Grande	Modify

3. Click "**Restore**" to recover the file, or "**Delete Permanently**" to permanently delete the file.

Files

Name	Changed	Size	Who	Actions
/	07-Sep-2011		Lynn Grande	Modify
10	17-Aug-2011		Paul Moeller	Modify
11	24-Aug-2011		Christina Boyce	Modify
Archived	23-Aug-2011		Christina Boyce	
10	12-Aug-2010		Yuriy Posherstnik	
11	15-Aug-2011		Lynn Grande	
5-11-0021-00-subs-1900-5-sequence-diagrams;1.docx	31-Jan-2011	1 KB	Lynn Grande	Restore, Delete Permanently
5-11-0027-01-mins-0073-telecon-minutes-14feb11;1.pdf	11-Aug-2011	45 KB	Lynn Grande	Restore, Delete Permanently
5-11-0028-00-drft-test;1.doc	05-Aug-2011	1 KB	Lynn Grande	Restore, Delete Permanently
5-11-0028-01-drft-test;1.doc	05-Aug-2011	1 KB	Lynn Grande	Restore, Delete Permanently
5-11-0029-00-subs-zsss;1.pdf	08-Aug-2011	45 KB	Lynn Grande	Restore, Delete Permanently
Project	23-Aug-2011		Christina Boyce	Restore
Public	22-Aug-2011		Lynn Grande	

4. Click "**Restore**" or "**Delete Permanently**" to confirm your selection.
5. The file will now appear in the appropriate folder outside of the "Archived" area. The file will be accessible from the "Documents" or "Wiki" areas if applicable.
6. If you have replaced a file, the older version will appear with a ";#" (e.g. 5-11-0021-00-subs-1900-5-sequence-diagrams;1.docx) If you recover this file, it will replace the current version, and the replaced version will now show up in the "Archived" section.

5.6 Accessing Files via WebDAV

In addition to the web interface, it is possible to access the files area via webdav. This feature allows you to access Mentor files as if they were a folder on your computer.

5.6.1 Using Public WebDAV

The public WebDAV allows read-only access to all public folders on Mentor.

Applicable Users:

- All Users

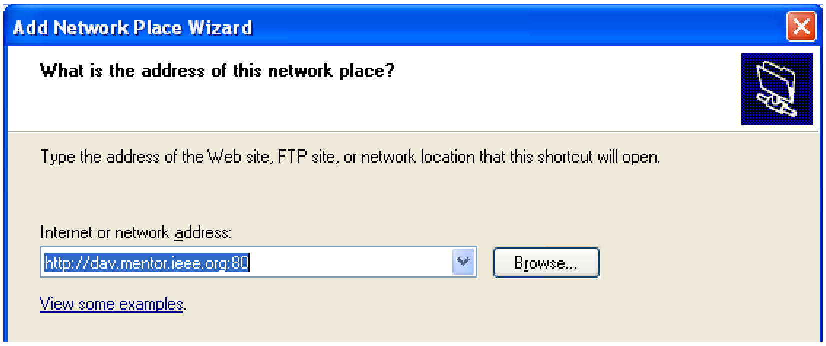
Instructions:

Windows:

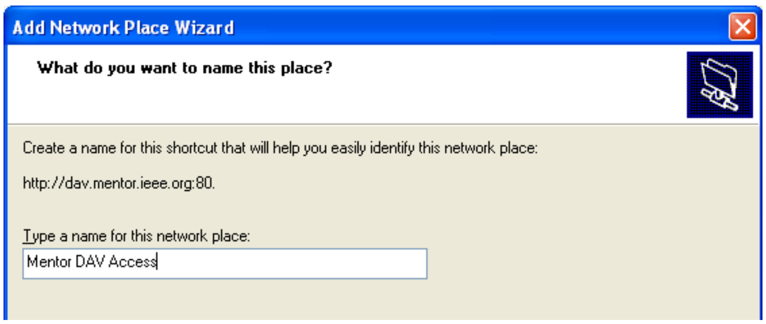
1. Go to "My Network Places"
2. Click "Add a network place"

3. Select "Choose another network location" and click "Next".

4. Enter "http://dav.mentor.ieee.org:80" into the "Internet or network address" field. And click "Next".



5. Type a name for the shortcut (this can be anything you want) and click “Next”.



6. You will see a screen telling you that you have successfully created the network place.

7. Click “Finish”.

5.6.2 Using Private WebDAV

The private WebDAV allows read/write access to all IC group folders you have access to. The Private WebDAV access will not work with Working Group areas.

Applicable Users:

- Editors

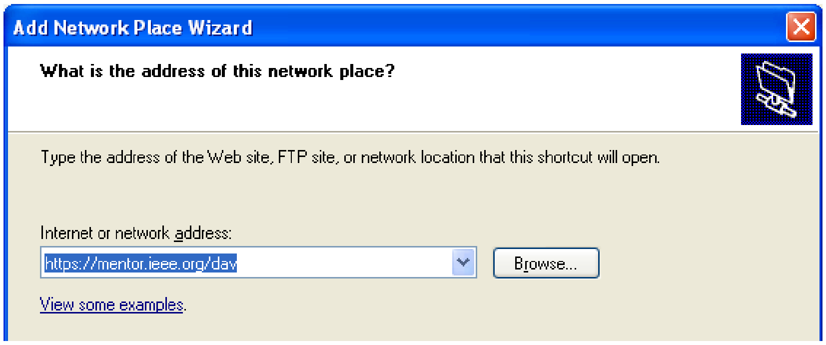
Instructions:

Windows XP:

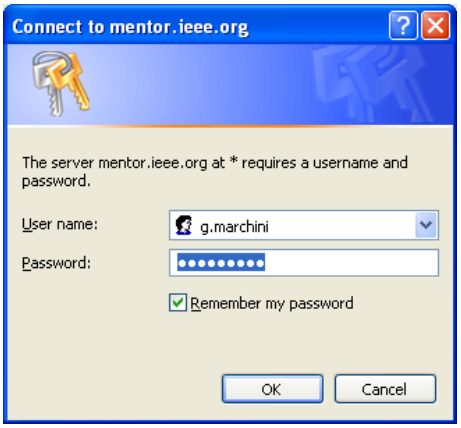
1. Go to "My Network Places"
2. Click "Add a network place"

3. Select "Choose another network location" and click "Next".

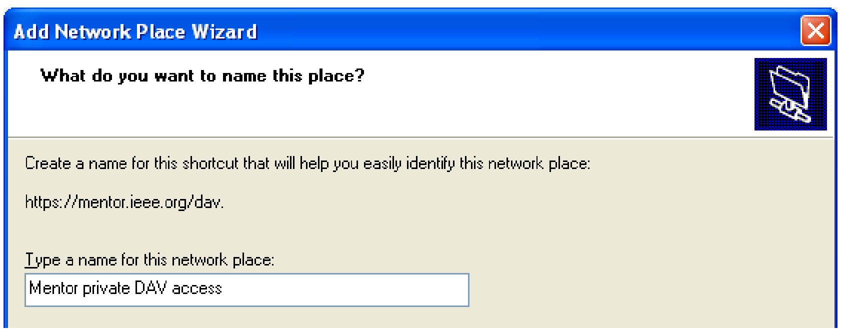
4. Enter "http://mentor.ieee.org/dav" into the "Internet or network address" field. And click "Next".



5. Enter your IEEE Web Account username and password.



6. Type a name for the shortcut (this can be anything you want) and click “Next”.



7. You will see a screen telling you that you have successfully created the network place.

8. Click “Finish”.

6 Wiki

Mentor features a wiki tool that allows groups to create their own start page as well as additional pages within Mentor. Users navigate wiki pages through links, just like most web pages. Wiki pages can be made both public and private. Public pages will be visible to everyone, even without logging in. Private pages will be visible to anyone in the group with an involvement level other than "interested". Only Officers/Admins and individuals who have been given "editor" access can edit wiki pages.

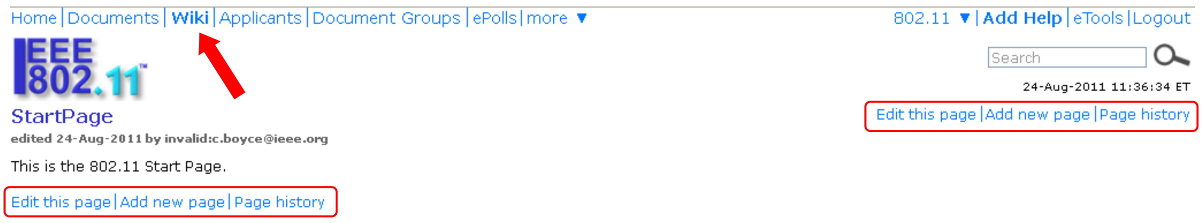
6.1 Accessing Wiki

Applicable Users:

- All Users

Instructions:

1. When you access your group's area in Mentor, you are automatically brought to the wiki start page. If you are in a different Mentor feature, click on the "Wiki" link at the top of the page.
2. If you have been given "editor" access, you will see links at the bottom of the page to "Edit this page", "Add new page" or view "Page history".



3. When accessing the wiki area, the first page displayed will be "StartPage".

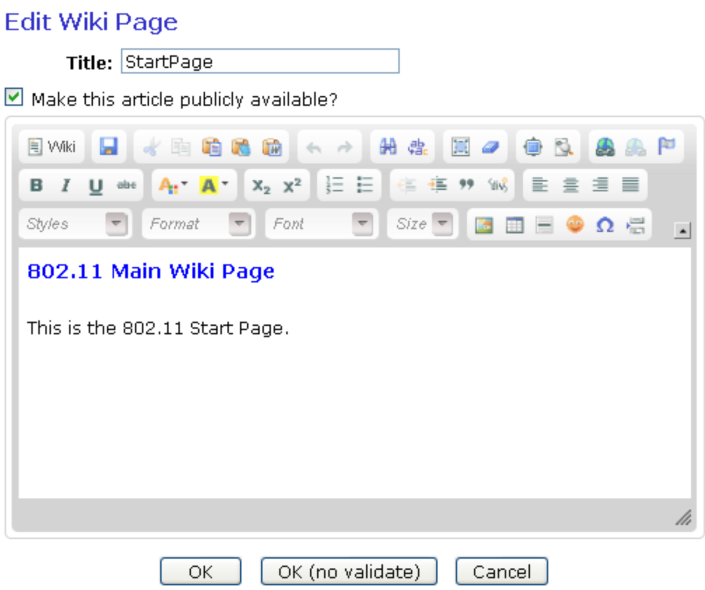
6.2 Editing a Wiki Page

Applicable Users:

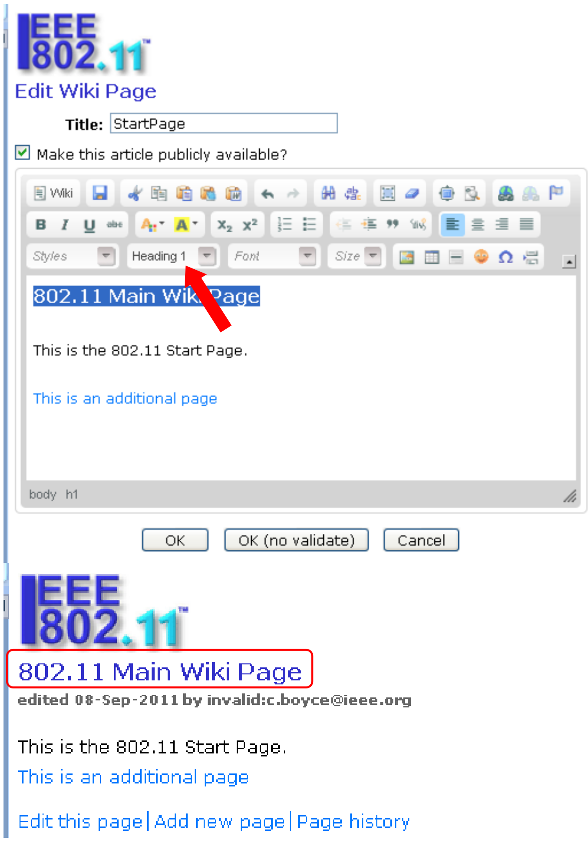
- Any users with "Editor" access, Officer, Admin, Staff Liaison, Mentor Staff

Instructions:

1. Navigate to the wiki page you would like to edit.
2. Click "Edit this page".
3. Change the page title
    - Changing the page title will change the page filename and URL; any links to the page must be modified accordingly.
    - Do not change the title of "StartPage".
4. Edit the page as necessary.
    - Use the graphical editor to edit the pages similar to a word processor.

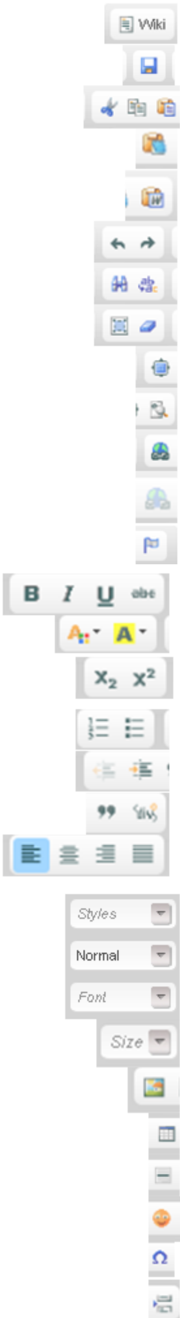


5. Mentor will automatically display the title when showing a wiki page. To replace this with alternate text:
   - type the text into the graphical editor.
   - Select the text and change the format to “Heading 1”



6. Click “**OK**” to save your changes.

The available editing tools are as follows:



- **Wiki** – wiki code view
- **Save** – Save the page (same as “OK” button)
- **Cut**, Copy, Paste
- **Paste plain text** – removes formatting
- **Paste from Word** – removes hidden characters when pasting from a Word document
- **Undo, Redo**
- **Find, Replace** – Find text and replace with other text
- **Select all, Remove formatting**
- **Maximize** – Full-screen editor view
- **Show blocks** – Shows boxes to denote paragraphs
- **Insert link**
- **Remove link**
- **Insert anchor**
- **Bold, Italic, Underline, Strikethrough**
- **Font Color, Background color**
- **Subscript, Superscript**
- **Numbered List, Bulleted List**
- **Increase Indent, Decrease Indent**
- **Block Quote, Create Div Container**
- **Align Left, Center, Right, Justify**
- **Formatting Styles –** choose from pre-defined formatting styles
- **Paragraph Format –** choose from pre-defined paragraph styles
- **Font Name**
- **Font Size**
- **Image** – Add images and change properties
- **Table**
- **Insert Horizontal Line**
- **Insert Smiley**
- **Insert Special Character**
- **Insert Page Break for Printing**

6.3 Adding and Linking an Additional Wiki Page

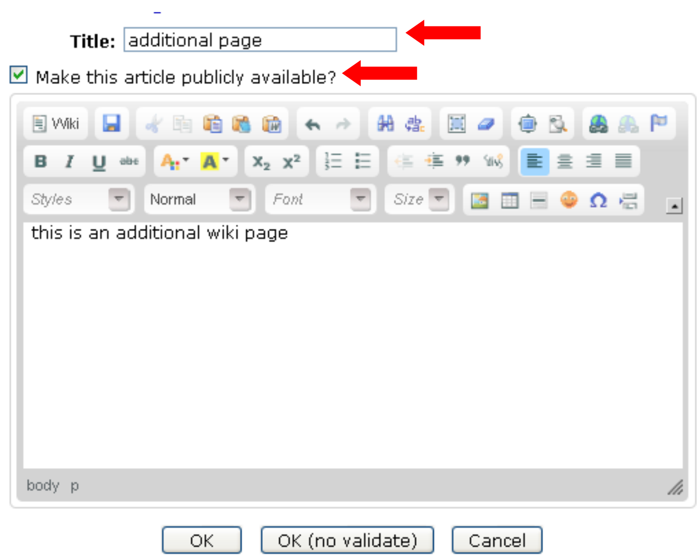
It is possible to create additional wiki pages for a Mentor group. These pages can be linked to from the start page or other wiki pages.

Applicable Users:

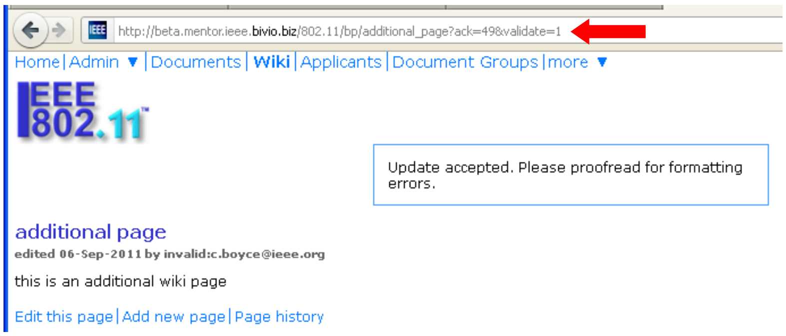
- Any users with "Editor" access, Officer, Admin, Staff Liaison, Mentor Staff

Instructions:

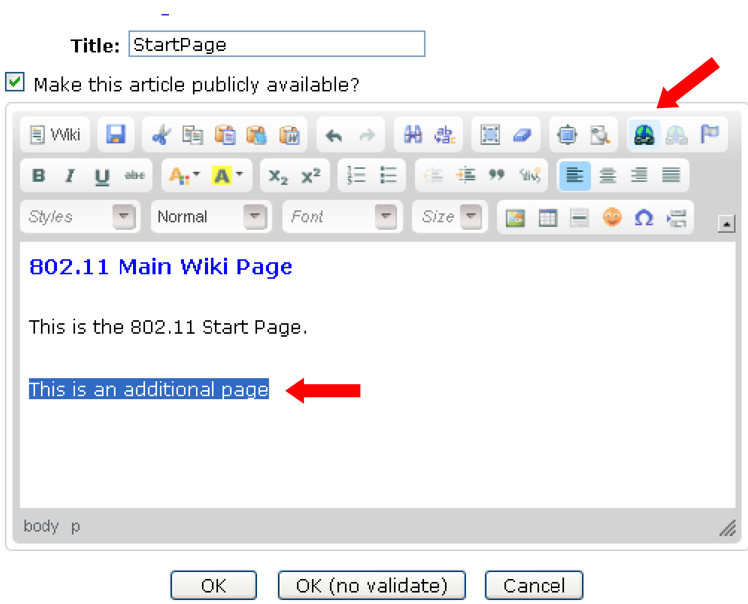
1. From any of your group wiki pages, click "**Add new page**".
2. Enter a title for your page.
3. Check the box next to "**Make this article publicly available**" if you would like to make this page public.



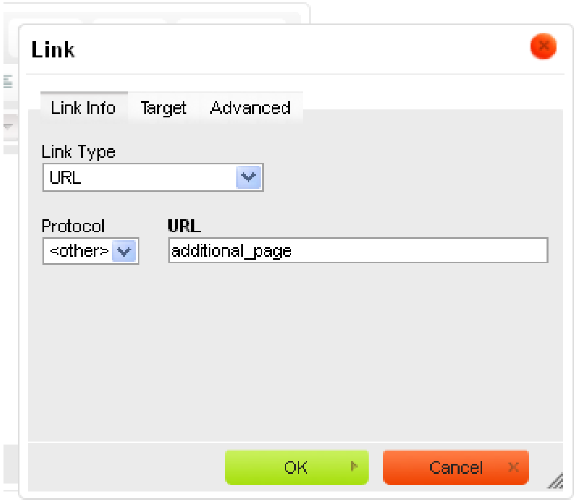
4. Edit the page using the graphical editor.
5. Click "**OK**" to save the new page.
6. Make note of the page URL. You will need the page name portion of this URL to insert a link into another page. The page name is the portion between the last "/" and the "?". E.g. http://Mentor.ieee.org/802.11/bp/additional_page?ack=49
   - This procedure is for linking from wiki pages within your Mentor group. For other links, use the full URL up to the page name. E.g. http://Mentor.ieee.org/802.11/bp/additional_page



7. Click “Edit this page” on the page where you would like to place the link.
8. Type the link text in the graphical editor.
9. Select the link text and click the “Insert Link” button.



10. Enter the page name in the “URL” field.
11. Select “<other>” from the “Protocol” menu.



12. Click “OK” to save the link.

6.4 Viewing and Reverting to Previous Wiki Versions

Mentor saves a unique version of each wiki page whenever it is edited. It is possible to view any of the older versions of the page and revert to them.

Applicable Users:

- Any users with "Editor" access, Officer, Admin, Staff Liaison, Mentor Staff

Notes:

- You will only be able to view previous versions of the start page, revert will not be available.

Instructions:

1. From any of your group wiki pages, click "**Page history**".
2. You will see a list of revisions to the wiki page along with the date made and the name of the editor.

Selected	Compare		Checked In	Who	Comments	Actions
⦿		current	01-Aug-2011	Gregory Marchini		
○	⦿	36	01-Aug-2011	Gregory Marchini		Revert to Version
○	○	35	01-Aug-2011	Gregory Marchini		Revert to Version
○	○	34	01-Aug-2011	Gregory Marchini		Revert to Version
○	○	33	29-Jul-2011	Gregory Marchini		Revert to Version
○	○	32	29-Jul-2011	Gregory Marchini		Revert to Version
○	○	31	29-Jul-2011	Gregory Marchini		Revert to Version
○	○	30	29-Jul-2011	Gregory Marchini		Revert to Version
○	○	29	28-Jul-2011	Gregory Marchini		Revert to Version
○	○	28	28-Jul-2011	Gregory Marchini		Revert to Version
○	○	27	27-Jul-2011	Gregory Marchini		Revert to Version
○	○	26	27-Jul-2011	Gregory Marchini		Revert to Version
○	○	25	27-Jul-2011	Gregory Marchini		Revert to Version
○	○	24	27-Jul-2011	Gregory Marchini		Revert to Version
○	○	23	26-Jul-2011	Gregory Marchini		Revert to Version

Compare Cancel

3. Click on the revision number to view that version of the page.
4. To compare two versions, click the buttons in the "Selected" and "Compare" columns next to the two versions and click "**Compare**".
5. You will see the wiki code view of the page with changes highlighted. Anything added will appear in green and anything deleted will appear in yellow. Unchanged portions will appear in gray.

```
@/p
@p
@a href="privatepage" This is a link to a private page
@/p
*** 10,10d13 ***
- @p Welcome to the Policy Language and Architectures for Managing Cognitive Radio for Dynamic Spectrum Access Applications working group document repository.
+ @p Welcome to the Policy Language and Architectures for Managing Cognitive Radio for Dynamic Spectrum Access Applications working group document repository.
+ @p
+ @/p
+ @p HELLO
```

6. To revert to a previous version, click "**Revert to Version**" next to that version and then click "**Revert**" to confirm.

7 Blog

The Blog feature can be used to post news, event notifications, articles, and other communications. This is another communications option that is available in addition to wiki pages and email. Like wiki pages, blog entries can be made public or private. Public entries will be visible to everyone, even without logging in. Private entries will be visible to anyone in the group with an involvement level other than "interested". Only Officers/Admins and individuals who have been given "editor" access can create and edit blog entries.

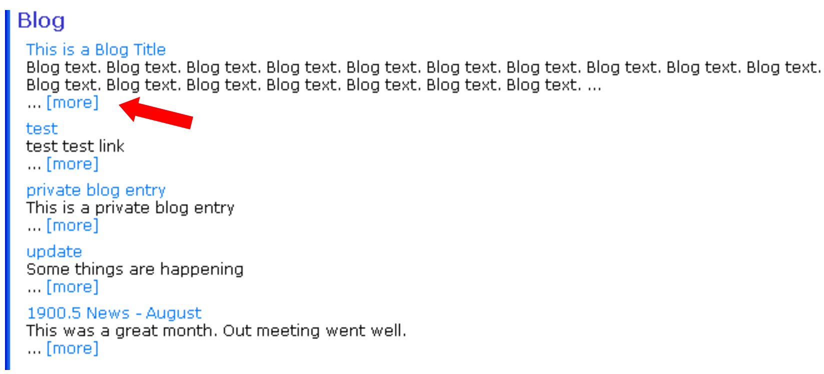
7.1 Viewing Blog Entries

Applicable Users:

- All Users

Instructions:

1. From your group's Mentor area, click "**Blog**" in the top left corner. If you don't see "**Blog**", click the "**more**" dropdown menu and select "**Blog**".
2. You will see a list of blog titles with part of the text. To view the entire entry, click "**[more]**".



3. You will now see the full blog entry. From this screen, you can click "**Back**" and "**Next**" to view previous and next entries or click "**Back to list**" to go back to the list of entries.

7.2 Creating a New Blog Entry

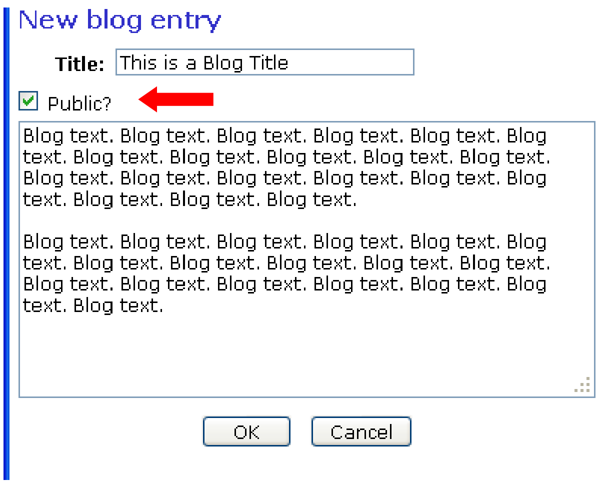
Applicable Users:

- Any users with "Editor" access, Officer, Admin, Staff Liaison, Mentor Staff

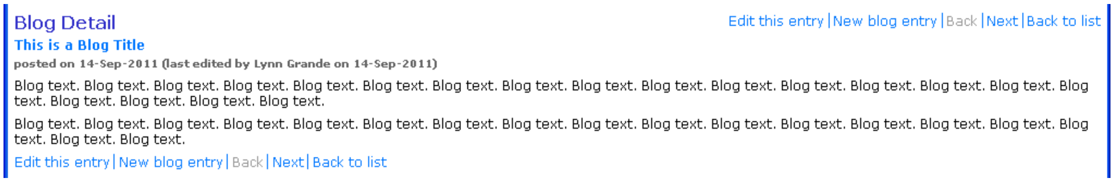
Instructions:

1. From your group's Mentor area, click "**Blog**" in the top left corner. If you don't see "**Blog**", click the "**more**" dropdown menu and select "**Blog**".
2. Click "**New blog entry**".

3. Enter a title and text for your blog.
4. Check "**Public?**" if you would like to make the entry public.



5. Click "OK" to create your blog entry.
6. You will now see the posted blog entry. From this screen, you can edit the entry or view other blog entries.



7.3 Editing a Blog Entry

Once a blog entry is created, it is possible to edit the entry using a graphical editor. Links and formatting can be added at this point.

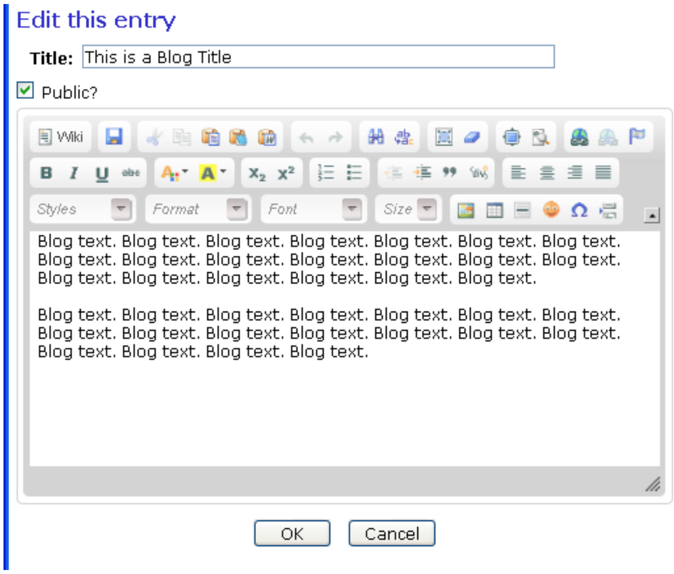
Applicable Users:

- Any users with “Editor” access, Officer, Admin, Staff Liaison, Mentor Staff

Instructions:

1. From your group’s Mentor area, click “**Blog**” in the top left corner. If you don’t see “**Blog**”, click the “**more**” dropdown menu and select “**Blog**”.
2. You will see a list of blog entries. To edit an entry, click “**Edit this entry**” next to the entry you would like to edit.

3. From this screen, you will be able to modify the title and public visibility, as well as edit the text in a graphical editor like the one used for Wiki.
   - For more information on using the editor, refer to the editing instructions in the Wiki section: **Sec 6. Wiki**.



4. Click “**OK**” to save any changes.

8 Mail

Mentor can be used to send email to your group. The email list is controlled by your group roster, meaning you do not have to maintain a separate email list. Users will only receive group emails if they have been given the subscriber privilege. For more information on managing privileges, see **Sec. 3.3 Changing Privileges**.

8.1 Mail Access

Access to mail features through the web interface is based on involvement level and the access options that have been selected by your group.

Access options are:

Who can send mail (via web and email interface): Administrators Only, Members Only (default), Guests and Members Only, Any Registered User (includes interested), Anybody (even non-users), Nobody (not even admins)
for working groups, only "voting members" are considered members, other involvement levels are treated as "guests"
Who can see mail (via web interface): Only Group Members (default), Anybody (this makes all emails publically available), Administrators Can Set Visibility (messages default to private)

The default type of access (members only) is as follows:

Table 2

Involvement Level	Can view mail messages?	Can send mail messages?	Can delete messages?
Interested	No	No	No
Observer	Yes	No	No
Potential Member	Yes	No	No
Aspirant Member	Yes	No	No
Nearly Member	Yes	No	No
Non-Voting Member	Yes	No	No
Guest (IC Groups)	Yes	No	No
Voting Member	Yes	Yes	No
Member (IC Groups)	Yes	Yes	No
Working Group Officer	Yes	Yes	Yes
Admin (IC groups)	Yes	Yes	Yes
IEEE Staff	Yes	Yes	Yes

8.2 Sending Mail (Web Interface)

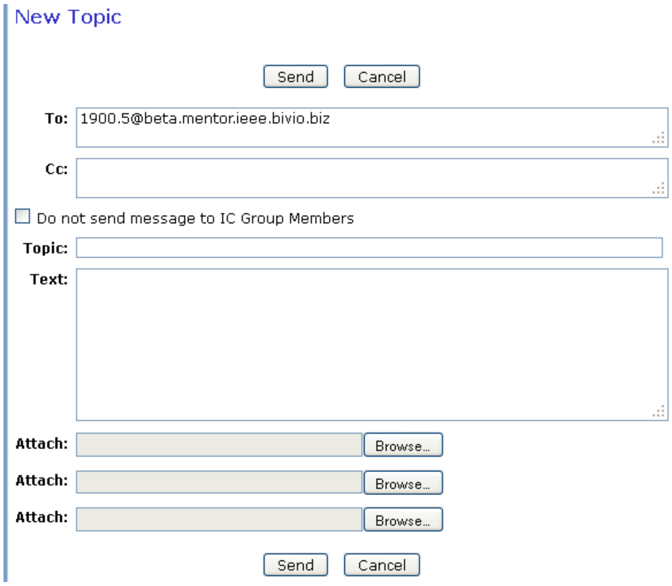
You can send emails to your group directly from the group's Mentor area.

Applicable Users:

- All users with appropriate access (See **8.1 Mail Access**)

Instructions:

1. From your group's Mentor area, click "**Mail**" in the top left corner. If you don't see "**Mail**", click the "**more**" dropdown menu and select "**Mail**".
2. Click "**New Topic**" to send a new email.
3. The Mentor group will be pre-filled in the "To" field. This will notify your subscribed group members. You can add any additional recipients in the "To" and "Cc" fields, separated by commas.
4. Type a topic and email text and attach any files.
    - The email will show up as coming from the sender. If you have had the "Mail replies go to the IC Group by default" feature turned on, replies will go to *group*@Mentor.ieee.org. If the "Mail replies…" feature has not been turned on, replies will go directly to the sender.
5. If you would not like the email to go to your group, check the "**Do not send message to IC Group Members**" box.



6. Click "**Send**" to send the email.

8.3 Sending Mail (Email Interface)

It is also possible to send emails to your group using any existing email account.

Applicable Users:

- All users with appropriate access (See **8.1 Mail Access**)

Note:

- If access to sending mail is restricted, you will only be able to send email from the email address associated with your IEEE Web Account.

Instructions:

1. Make note of the email address that shows up in the web interface. This should be *group*@Mentor.ieee.org, where *group* is the shortened name of your Mentor group.
2. Use your existing email account to compose and send an email to *group*@Mentor.ieee.org.

8.4 Viewing Emails (Web Interface)

Besides emails being sent to your personal email account, you can view emails sent through Mentor via the web interface.

Applicable Users:

- All users with appropriate access (See **8.1 Mail Access**)

Instructions:

1. From your group's Mentor area, click "**Mail**" in the top left corner. If you don't see "**Mail**", click the "**more**" dropdown menu and select "**Mail**".
2. You will see all email subjects along with part of the body text. Any replies will appear in a thread within the initial message. Click the subject or the number of messages to see all of the email text and any attached files.
3. From this screen, you can use the web interface to reply to an email, or delete an email (officers/admins only).

9 Calendar

Mentor allows groups to create a shared calendar. Users can view dates for one group or all of their groups in a list or calendar view. Calendar data can also be downloaded in iCal format.

Read access to calendars is available to any involvement levels other than "interested". Only individuals with "Editor" privileges will be able to add, modify and delete events.

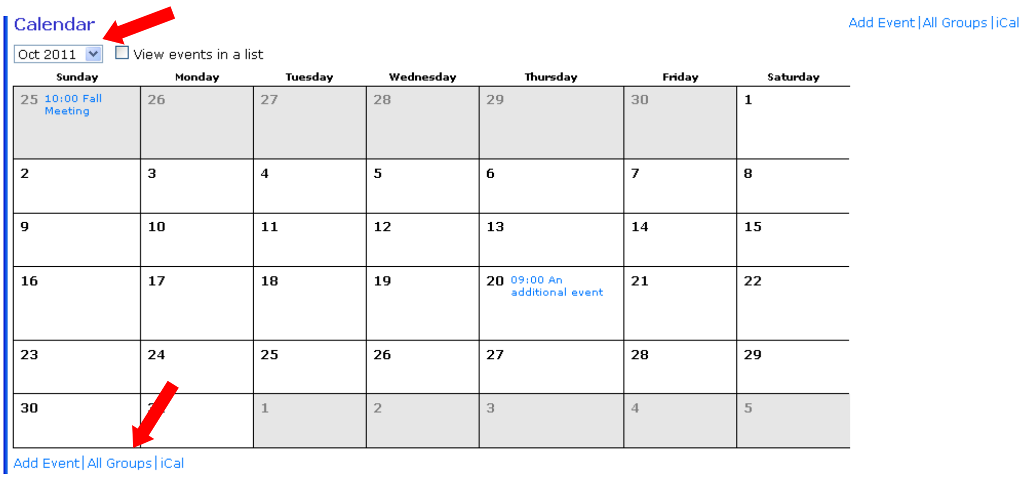
9.1 View Calendar Events

Applicable Users:

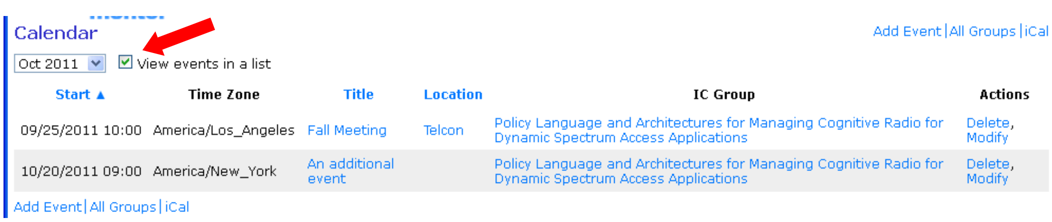
- All Users

Instructions:

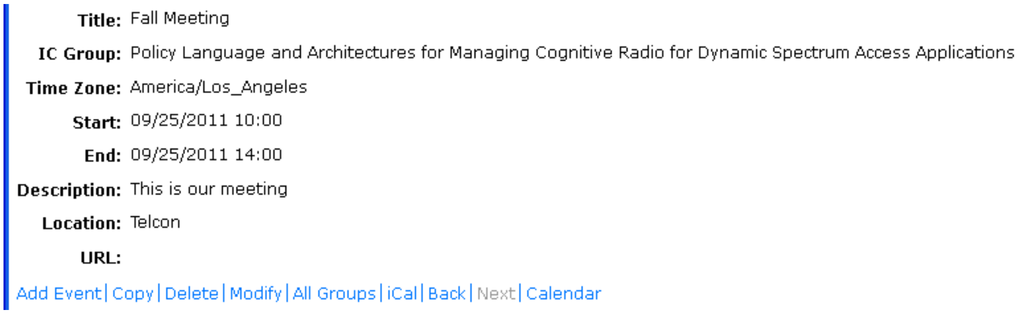
1. From your group's Mentor area, click "**Calendar**" in the top left corner. If you don't see "**Calendar**", click the "**more**" dropdown menu and select "**Calendar**".
2. You will see a calendar view of the current month. To view another month, select it from the dropdown menu.
3. If you would like to see events for all groups you are involved in, click "**All Groups**".



4. To view the events in a list instead of on a calendar, check the "**View events in a list**" box. You will only be able to view one month at a time.



5. Click on the event title to view the full event details.



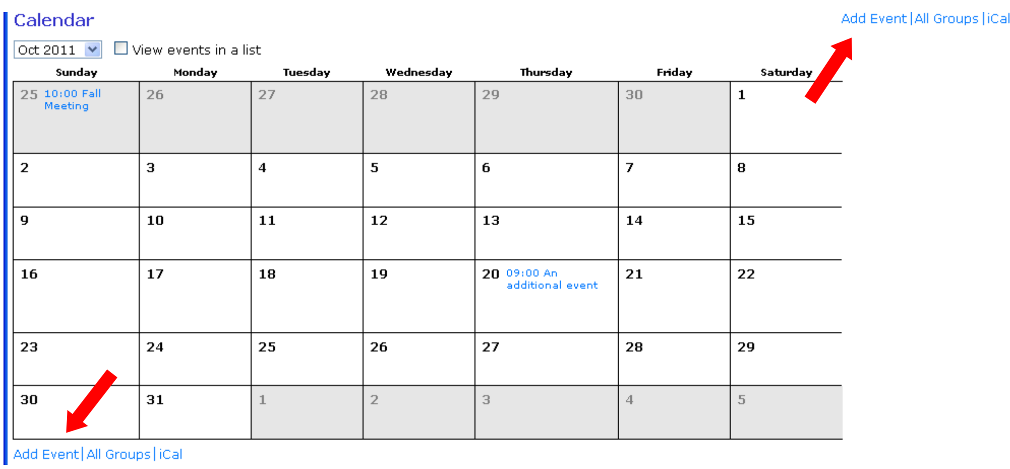
9.2 Create a New Event

Applicable Users:

- Any users with “Editor” access, Officer, Admin, Staff Liaison, Mentor Staff

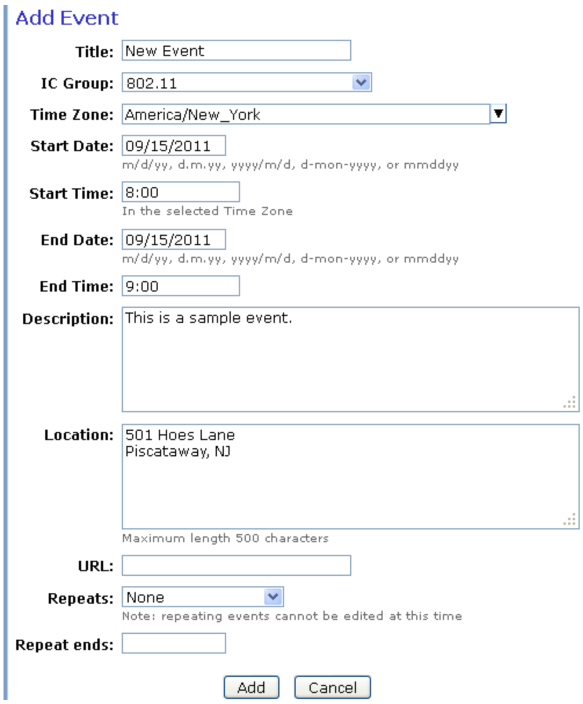
Instructions:

1. From your group’s Mentor area, click “**Calendar**” in the top left corner. If you don’t see “**Calendar**”, click the “**more**” dropdown menu and select “**Calendar**”.
2. Click “**Add Event**” or move your mouse over a date and click “**Add Event**”.



3. Enter a title for the event
4. Select the group’s calendar you would like to place the event in. This will default to the group you were in.
5. Select the time zone for the event
6. Enter a start date and time and an end date and time. Times will display in 24 hour format, but you can enter times followed by AM or PM and they will be converted.
7. Enter a description, location, and/or URL. These fields are optional.

8. If this is a repeating event, enter the repeat frequency and end date.
    - Be advised, you will not be able to modify or delete all instances of a repeating event, they will be handled individually once created.


Add Event

Title: New Event

IC Group: 802.11

Time Zone: America/New_York

Start Date: 09/15/2011
m/d/yy, d.m.yy, yyyy/m/d, d-mon-yyyy, or mmddyy

Start Time: 8:00
In the selected Time Zone

End Date: 09/15/2011
m/d/yy, d.m.yy, yyyy/m/d, d-mon-yyyy, or mmddyy

End Time: 9:00

Description: This is a sample event.

Location: 501 Hoes Lane
Piscataway, NJ
Maximum length 500 characters

URL:

Repeats: None
Note: repeating events cannot be edited at this time

Repeat ends:

Add Cancel

9. Click “**Add**” to create the event.

9.3 Modify, Copy or Delete an Event

Applicable Users:

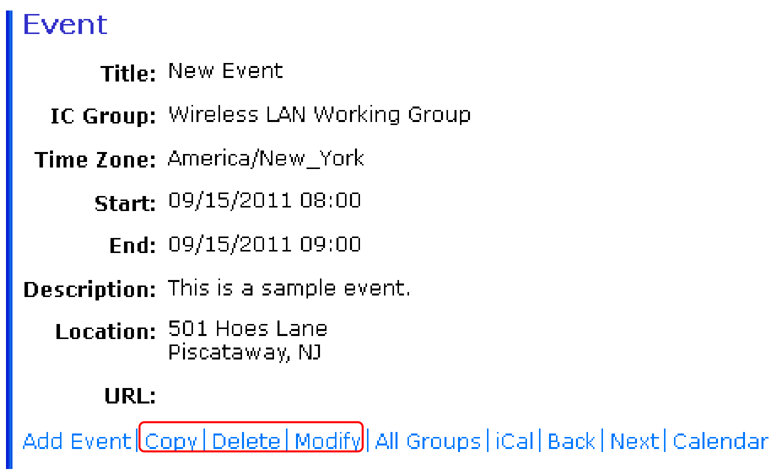
- Any users with "Editor" access, Officer, Admin, Staff Liaison, Mentor Staff

Instructions:

1. From your group's Mentor area, click "**Calendar**" in the top left corner. If you don't see "**Calendar**", click the "**more**" dropdown menu and select "**Calendar**".
2. Click on the event title to bring up the event details.
   To Modify an Event:
   1. Click "Modify"
   2. You will see the same form used to create the event. Change any of the fields to modify the event.
   3. Click "Modify" to save the changes

   To Copy an Event:
   1. Click "Copy"
   2. You will see the same form used to create the event. Change any of the fields to modify the event copy.
   3. Click "Copy" to save the changes

   To Delete an Event:
   1. Click "Delete"
   2. Click "Delete" to confirm.



9.4 Export Calendar Files

Events in Mentor calendars may be exported as iCalendar files, which can be imported into most popular calendar programs. These programs include: Apple iCal, Microsoft Outlook, Lotus Notes, Google Calendar, and many more.

Applicable Users:

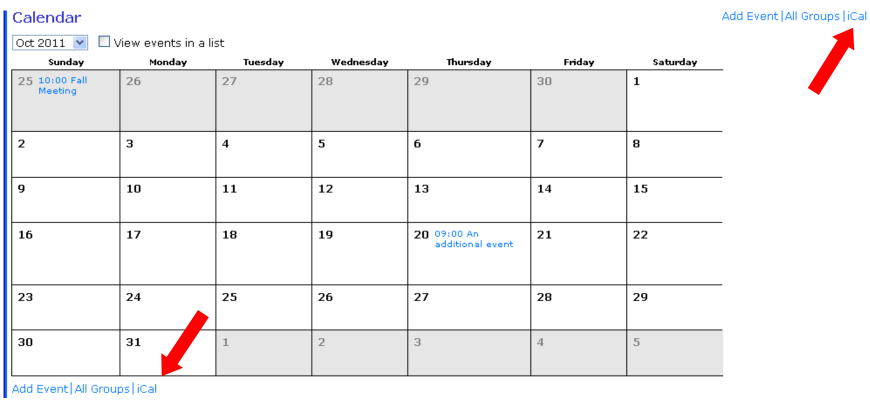
- All Users

Instructions:

1. From your group's Mentor area, click "**Calendar**" in the top left corner. If you don't see "**Calendar**", click the "**more**" dropdown menu and select "**Calendar**".
2. You can export files for an entire calendar or a single event.

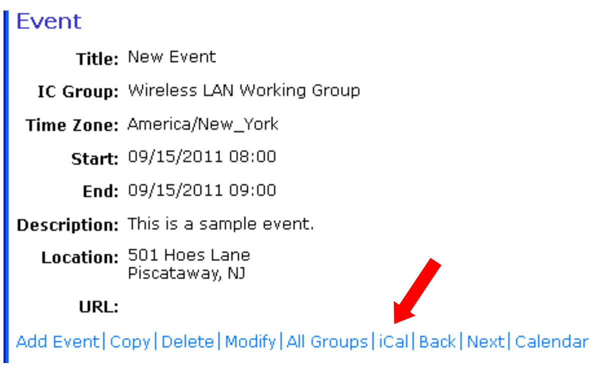
   For the entire calendar:

   1. Click "iCal" while in the calendar or list view.



   For a single event:

   1. Click on the event title to view the event details.
   2. Click "iCal" while viewing the event.



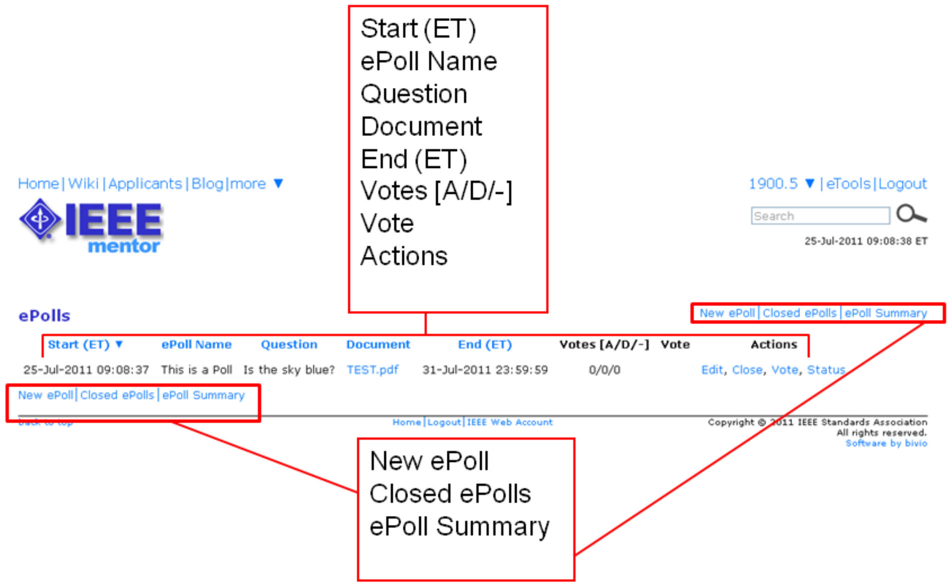
3. Save the file to your computer.
4. Open the file with your preferred calendar program.

10 ePolls

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.

10.1 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:



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.

10.2 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 section for more information on this feature.

10.3 Creating a New Poll

Applicable Users:

- Officers/Admins, Staff Liaison, Mentor 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 3.2.1.**
- 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.

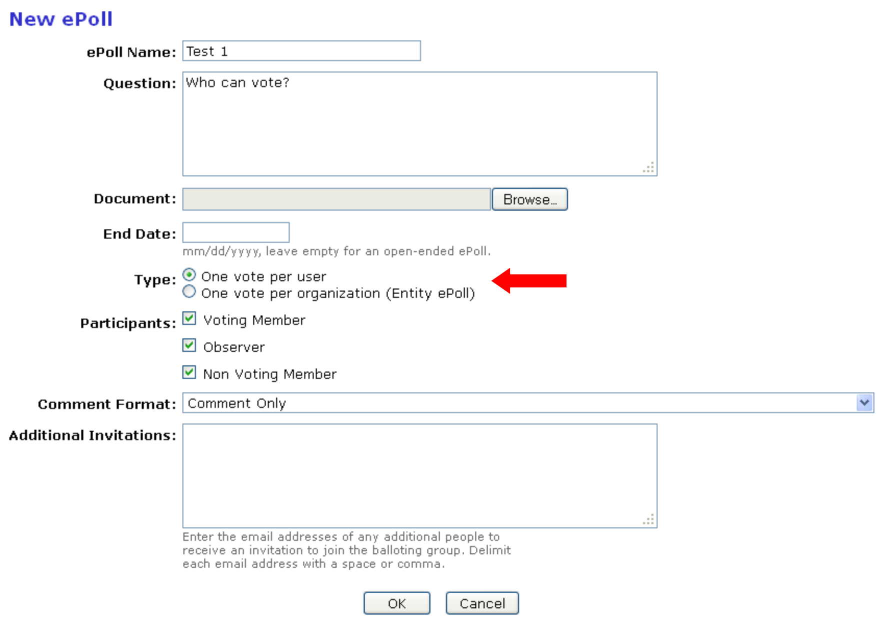
Instructions:

1. From 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**".
2. From the main ePolls screen, select "**New ePoll**".
3. 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 3 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 (reminders will only be sent if the individual has not yet voted). Notifications will include a direct link to the poll, and 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.

4. 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".



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 3 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 the **myProject™ User Guide**.

10.4 Editing a Poll

Applicable Users:

- Officers/Admins, Staff Liaison, Mentor 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 3.2.1**.
- 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 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**".
2. From the main ePolls screen, click "**Edit**" next to the poll you would like to see details from.

3. 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.
4. Click "**OK**" to update the poll.

***Entity ePoll*:**

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

10.5 Voting and Submitting Comments

Applicable Users:

- All users who have been given access to the ePoll

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.

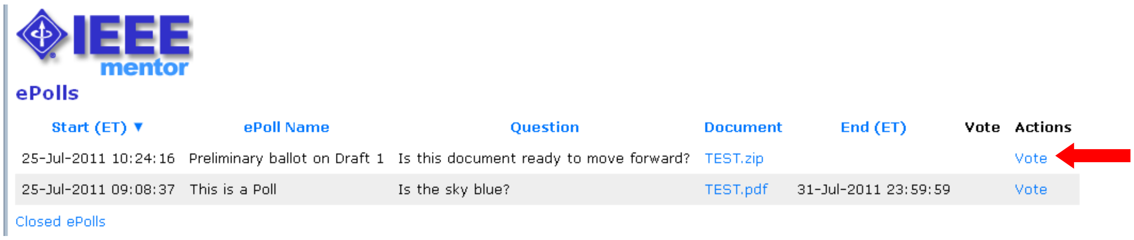
***Entity ePoll*:**

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.

10.5.1 Voting

Instructions:

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



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

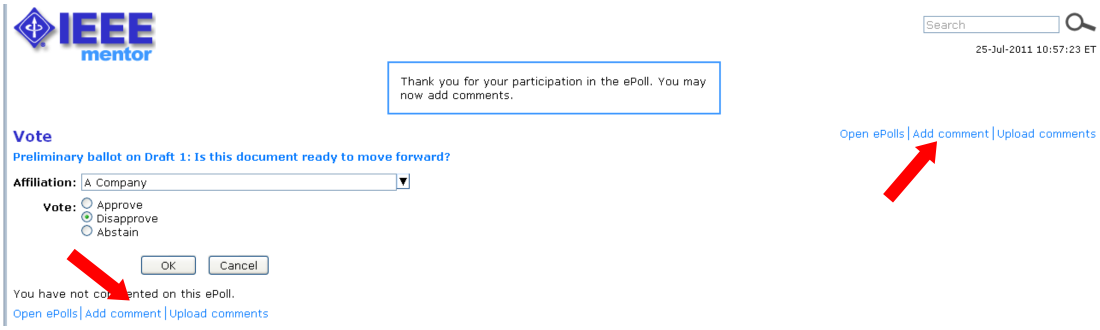
10.5.2 Submitting Comments

Applicable Users:

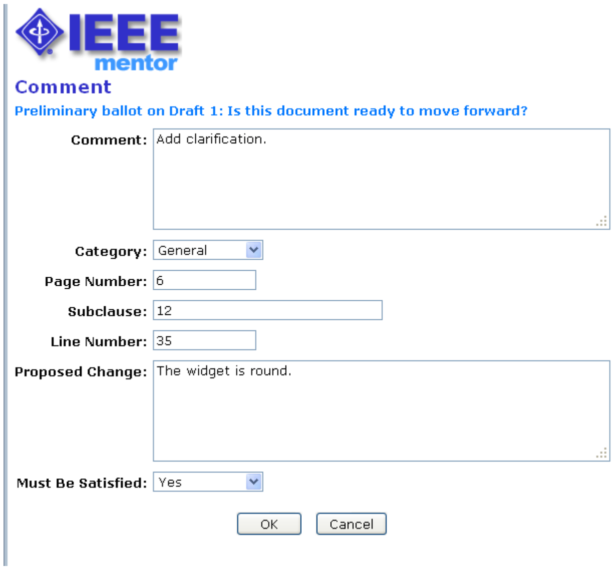
- Officers/Admins, Staff Liaison, Mentor Staff

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**".



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.

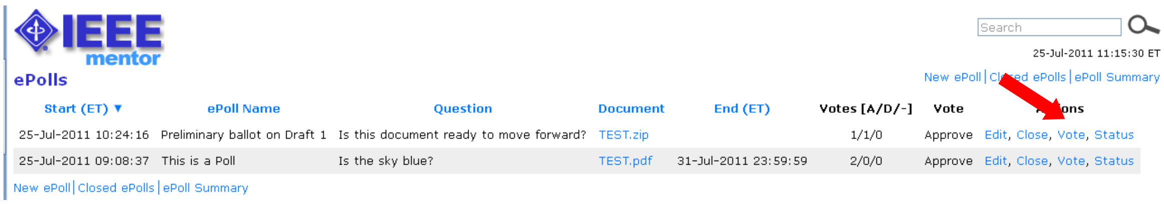


4. Your comments will appear under your vote.

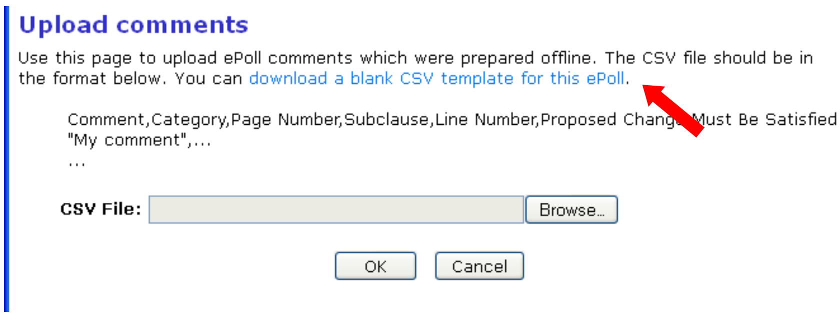
10.5.3 Uploading Comments

Instructions:

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



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

10.5.4 Changing a Vote

Applicable Users:

- All users who have been given access to the ePoll

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.

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

10.6 Viewing Votes and Comments

Applicable Users:

- All users who have been given access to the ePoll

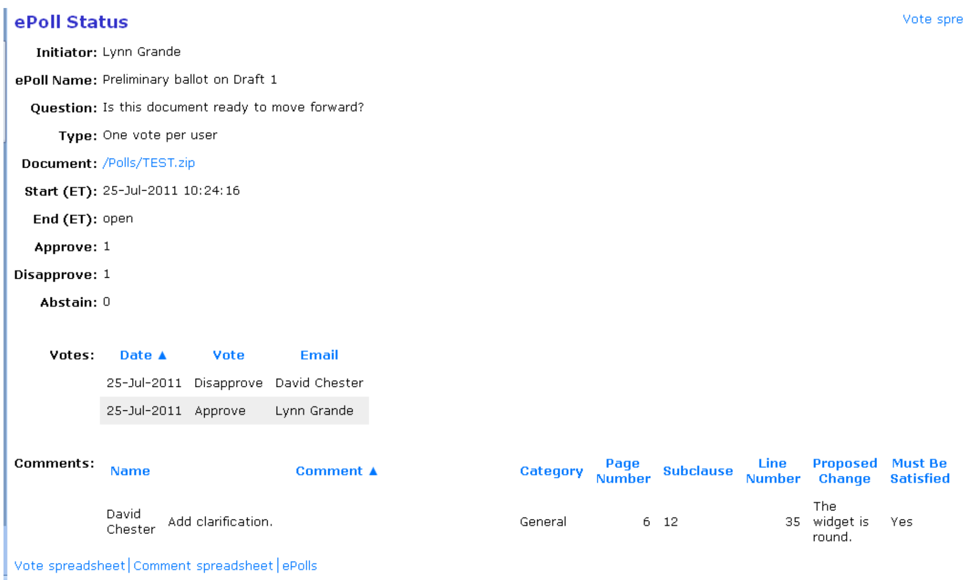
Note:

- 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.

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.



10.6.1 Downloading Comments and Votes

Applicable Users:

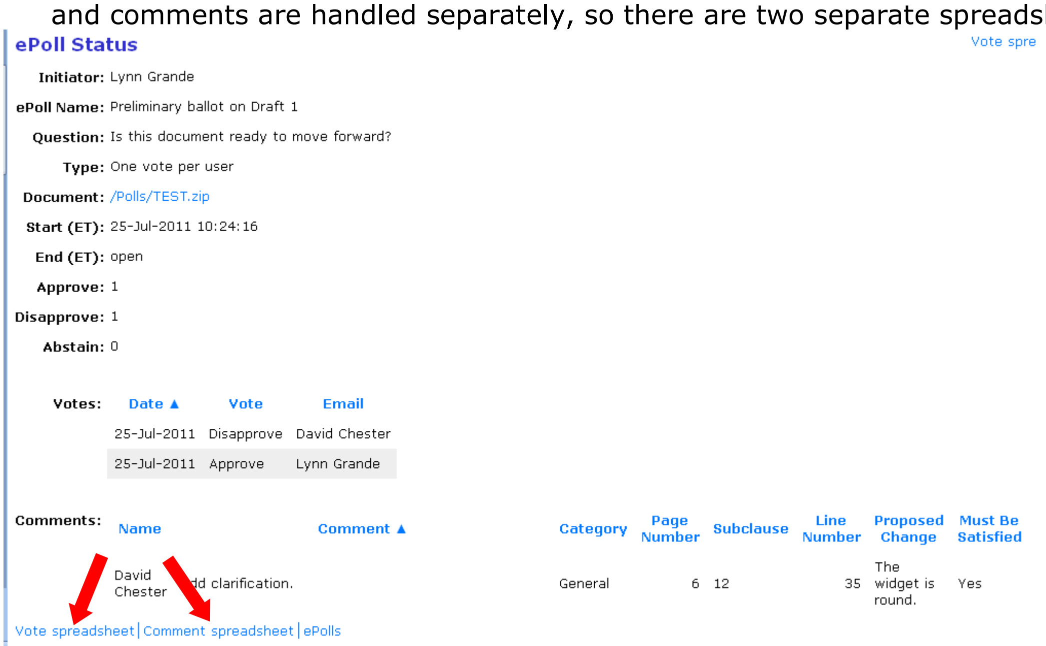
- All users who have been given access to the ePoll

***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.



10.6.2 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 Liaison, Mentor Staff

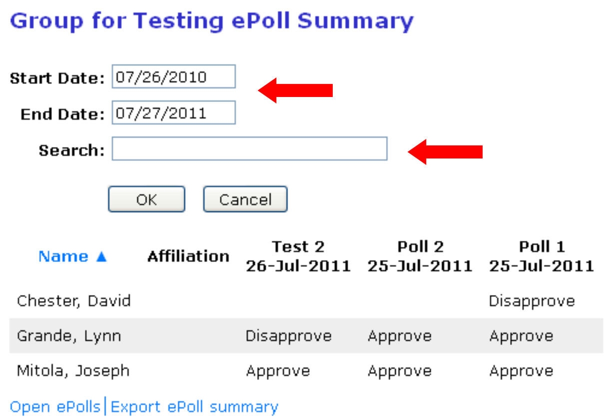
***Entity ePoll*:**

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.

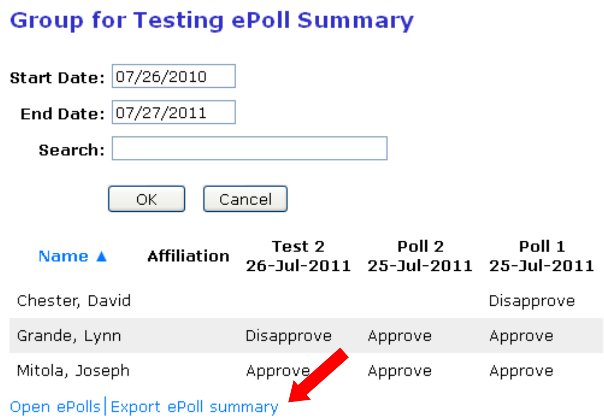
Instructions:

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

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**".



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



10.7 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 Liaison, Mentor Staff

Instructions:

1. 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**".
2. From the main ePolls screen, click "**Close**" next to the poll you would like to close.

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

11 Staff Admin Functions

11.1 Add a Working Group to Mentor

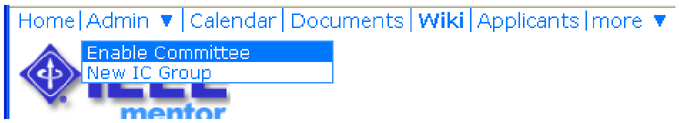
Working Groups do not automatically appear in Mentor. Working Groups must first be enabled by an administrative staff user. The group rosters will be maintained in myProject™.

Applicable Users:

- Mentor Staff

Instructions:

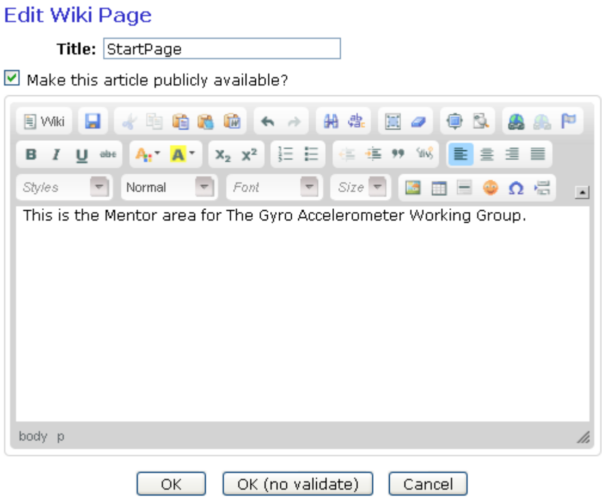
1. From the "**Admin**" menu, select "**Enable Committee**".



2. Select the Working Group from the "Committee" dropdown menu.
3. Type a short name for the group that will be used in the group URL into the "Link Name" box.
4. Place a check in the box next to all features the group wants to have access to and select the type of mail access.

5. Click "**Enable**" to create the Mentor group.

6. You will be prompted to create a Wiki Start Page for the group. Edit the page and click "**OK**" to create.



11.2 Add an Independently Connected (IC) Group

In addition to Working Groups, Mentor can also be used for other group collaboration. These other groups are referred to as Independently Connected (IC) groups. IC group rosters are maintained directly in Mentor.

Applicable Users:

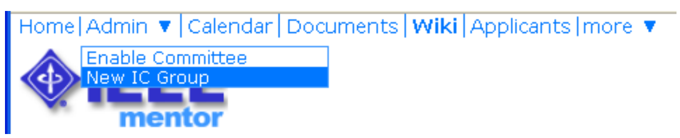
- Mentor Staff

Notes:

- Since this group is not connected to myProject™, you will need to add individuals to the group. Initially you will be the only member; group administrators will also be able to add individuals once they have been added.
- See **Sec 3.1 Managing IC groups** for more information on adding members.

Instructions:

1. From the "Admin" menu, select "New IC Group".



2. Type the full name of the group into the "Title" box.
3. Type a short name for the group that will be used in the group URL into the "Link Name" box.
4. Place a check in the box next to all features the group wants to have access to and select the type of mail access.

5. Click "Create" to create the Mentor group.
6. You will be prompted to create a Wiki Start Page for the group. Edit the page and click "OK" to create.

11.3 Group Features Detail

Blog – Allows the group to use the Blog feature

Calendar – Allows the group to use the Calendar feature

Documents – Allows the group to use the Documents feature

Documents are allowed to be public – Allows the group to have public documents; if unchecked, all documents will be private.

Documents may be added or revised by any involvement level – Allows any involvement level other than "interested" to edit and revise documents. See **Sec 4.1 Managing User Access** for default document access permissions.

ePoll – Allows the group to use the ePoll feature

Mail – Allows the group to use the Mail feature

Mail replies go to the IC Group by default – Uses *group*@Mentor.ieee.org as the reply to email address instead of the sender's email address.

Select who can send mail: Administrators Only, Members Only (default), Guests and Members Only, Any Registered User (includes interested), Anybody (even non-users), Nobody (not even admins)
for working groups, only "voting members" are considered members, other involvement levels are treated as "guests"

Select who can see mail (via web interface): Only Group Members (default), Anybody (this makes all emails publically available), Administrators Can Set Visibility (messages default to private)

11.4 Changing Group Features

Features available to existing Mentor groups, as well as the group name, can be changed at any time.

Applicable Users:

- Mentor Staff

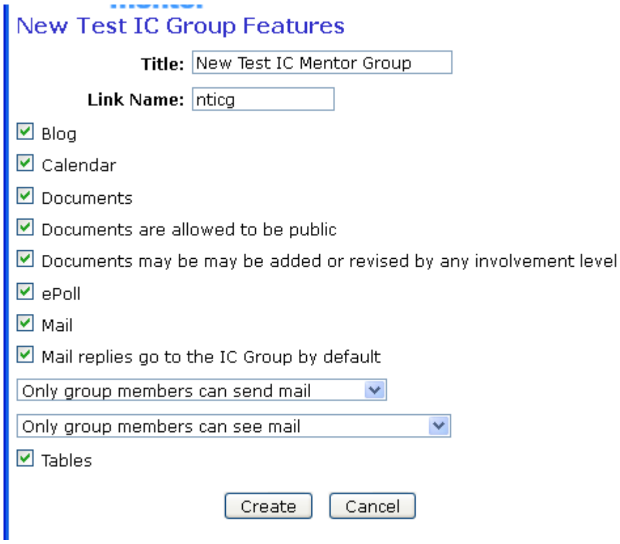
Notes:

- If changes to the "Link Name" are made, the group URL will change and any links to it will need to be modified.

Instructions:

1. Navigate to the group's Mentor area.
2. Click "Features".

3. Make any necessary changes to the group "Title" and "Link Name" (IC groups only).
4. Check/Uncheck any features you would like to add/remove and select mail access from the dropdown menus.



5. Click "**Create**" or "**OK**" to save the changes.