A step by step guide

#### Contents

Accessing the Committee Review Interface

**Meetings** 

**Votes** 

**VOTE ON IDF'S** 

**Vote Online** 

Vote Offline

**PRIOR VOTES** 

Bug, Enhancement and Help Requests

Link to Training Video: <a href="https://videoportal.intel.com/media/0">https://videoportal.intel.com/media/0</a> <a href="https://videoportal.intel.com/media/0">hktuz71b</a>

# QUICK REFERENCE GUIDE

Below are answers to some commonly-asked questions. The pages following the Quick Reference Guide provide detailed instructions.

Q1: How do I vote on IDFs?

A1: From the Home page, select the "Vote on IDFs" icon

Q2: How do I view prior votes?

A2: From the Home page, select the "Prior Votes" icon.



#### Q: How do I revise a previous vote?

A: Votes can only be revised if the meeting is still opened. If the meeting has been closed, no voting or revisions are allowed. To view open meetings, select Open Meetings from the Home page and select the appropriate meeting. Locate the Disclosure number and update the Vote by selecting the field under the Vote column. Click out of the Vote field to save the Vote.

Q: How do I tell if a meeting is still opened?

A: A list of the open meetings appears under the Open Meetings icon on the Home page.

Q: How do I vote offline?

A: Go to the "Vote on IDF's" icon, then select Download Excel (Vote Offline) from the More Actions menu located on the top right side.

Q: What should I do if I do not see any meetings?

A: A member must be invited to a meeting by the Portfolio Manager to view and vote on IDFs. If a meeting or meetings do not appear on the Committee IDF Review Homepage, submit a Help request via the Bug, Help, Enhancement icon or contact the Portfolio Manager.

Q: What should I do if I cannot enter a Vote or Comments?

A: A common issue is that the Vote and/or comments are not saved, If Chrome is not being used, then try using Chrome. If this does not solve the problem submit a bug request submit a Help request via the Bug, Help, Enhancement icon.

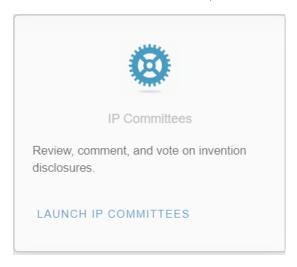
# COMMITTEE REVIEW DETAILED

# **INSTRUCTIONS**

The IP Committees interface is used by members of an IPG patent committee. Committee Members can review and vote on existing disclosures that are in an open meeting.

## Accessing the Committee Review Interface

To launch the Committee Review interface, select the Committee Review 2.0 icon shown below.



The IP Committee homepage will open, providing the number of votes, number of IDFs and other valuable information that will be reviewed throughout this document.

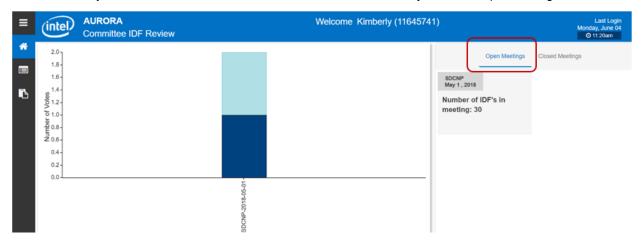
### Meetings

The right panel gives you options to display IDF's by meetings. The following options are available:

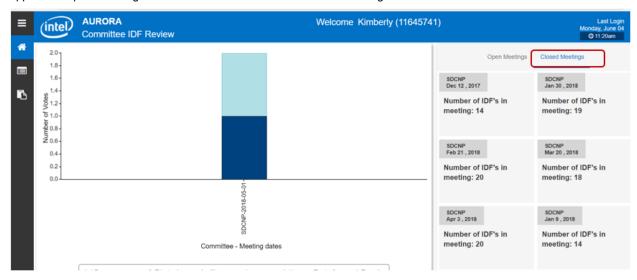
- 1. Open Meetings
- 2. Closed Meetings



1. <u>Open Meetings</u>: From the Home Page, Open Meetings summaries are available. Select the Open Meeting that needs to be reviewed. This will enable you to view the IDFs, Vote, and make comments. Note that only IDFs in an Open Meeting can be voted on.



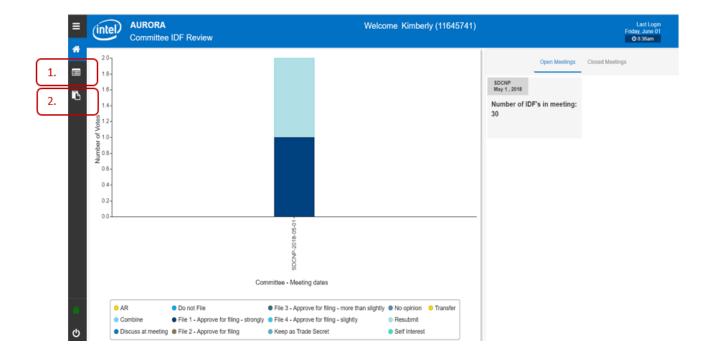
2. <u>Closed Meetings</u>: From the Home Page, Closed Meeting summaries are available. Closed meetings show a summary of IDFs that appeared in past meetings. You cannot vote on IDF's in a closed meeting.



Votes

The left panel has two vote options:

- 1. Vote on IDFs
- 2. Prior Votes

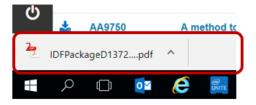


#### **VOTE ON IDF'S**

IDF's can be reviewed individually in PDF format by selecting the Download icon to the left of each IDF entry.



The document will download on the left bottom side of the screen



Alternatively, you can download multiple, selected IDF's to an Excel spreadsheet, PDF file, or Microsoft Word. To download IDFs select More Actions on the right side of the screen.

- 1. Select Committee and Meeting Date
- 2. Select Download Excel (Vote Offline)
- 3. Download PDF review package
  - a. Downloads all PDF documents in the selected meeting.
- 4. Download Word review package
  - b. Downloads all Word documents in the selected meeting.



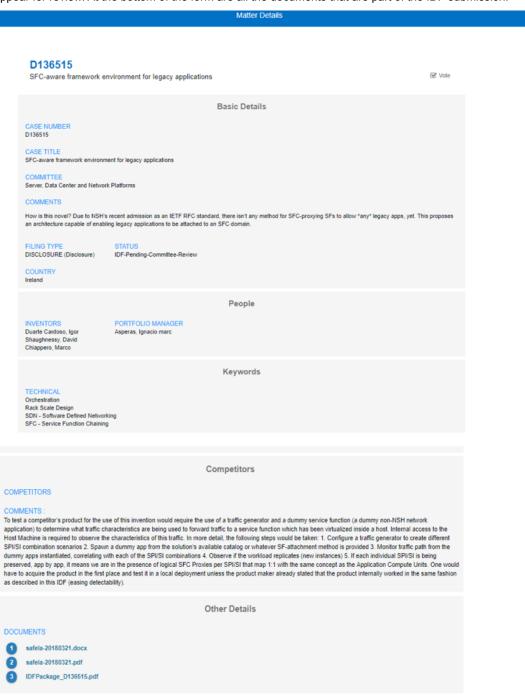
#### Vote Online

There are two ways to access online voting:

1. Select the IDF link under the Name/Title column, OR select the link under the Disclosure column. A Vote icon is available through this link.

	Disclosure	Name / Title	Meeting Date	Committee
Ł	D136515	SFC-aware framework environment for legacy applications	2018-May-01	SDCNP

The IDF form will appear for review. At the bottom of the form are all the documents that are part of the IDF submission.



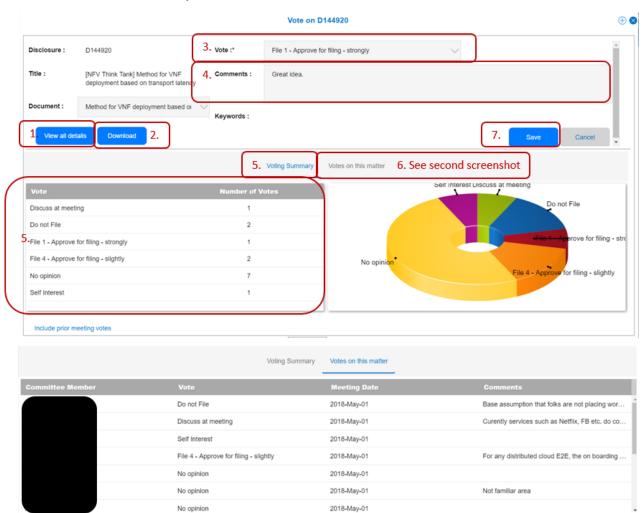
Voting can be done from this page by selecting Vote at the upper right part of the screen:



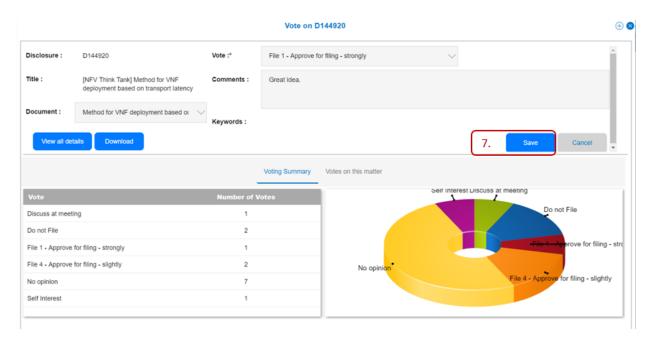
In the below view the following actions can be performed.

- 1. View all details
- 2. Download
- 3. Vote
- 4. Add Comments
- 5. View Voting Summary
- 6. View Votes on the Matter
- 7. Save

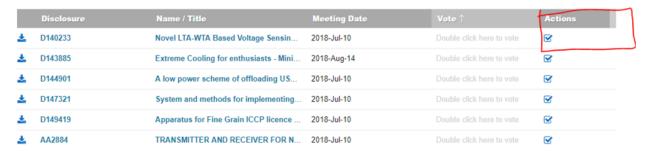
Select the Vote and enter comments, if any.



Once completed, select Save



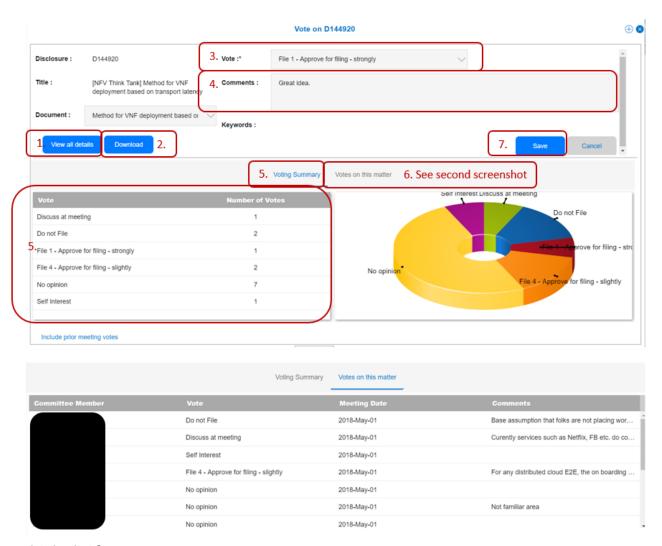
2. Select the Checkmark under the Actions column (far right)



In the below view the following actions can be performed.

- 1. View all details
- 2. Download
- 3. Vote
- 4. Add Comments
- 5. View Voting Summary
- 6. View Votes on the Matter
- 7. Save

Select the Vote and enter comments, if any.



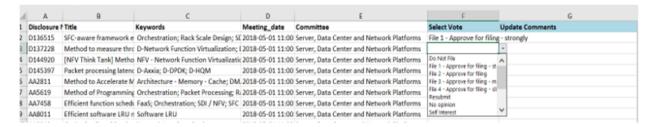
Once completed, select Save



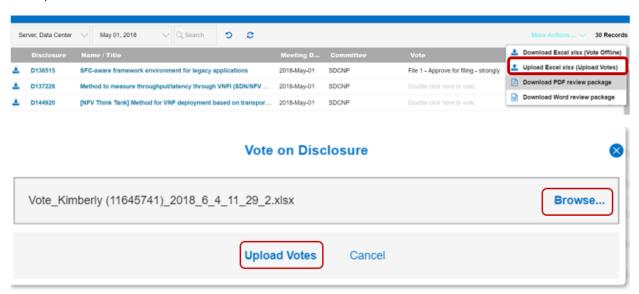
#### Vote Offline

Once the IDF's for your meeting have been selected, select More Actions on the right side of the screen, and select Download Excel.

Open the Excel document and click on the field under the Select Vote column. Select the Votes and enter any comments for each matter.



- 1. Select Upload Excel (Upload Votes)
- 2. Select the document to upload by selecting Browse
- 3. Select Upload Votes



Once the document is uploaded a notification will appear that the upload was successful.

File uploaded successfully

If the notification does not appear and the Votes are not uploaded, please submit a bug request. Instructions on how to submit a bug request are listed below.

#### **PRIOR VOTES**

Prior Votes allows you to review (but not modify) votes that were made in past meetings. This generates the same list of IDF's as the Committee/Meeting Date under Closed Meetings.

- 1. Select the Prior Votes icon
- 2. Select the Committee
- 3. Select the Meeting Date

From this view you can review votes previously made, if any votes were entered.



## Bug, Enhancement and Help Requests

To submit a bug request, select the green icon located on the left lower side of the interface.



#### Complete the form and select Submit.

Bug, Enhancement, Help Request

