IEEE SA STANDARDS ASSOCIATION

myProject

User Guide

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1 Introduction

myProject is:

- A web-based tool that facilitates the IEEE standards process
- A database that holds information related to the standards process
- A tool used by IEEE members, staff, and other individuals who want to participate in the standards process

In order to use my project, you must have:

- Access to the internet
- A web browser (Chrome is the recommended browser) for more information, see the IEEE Browser policy https://www.ieee.org/about/help/browser-policy.html
- A PDF viewer (e.g. Adobe Reader)
- A spreadsheet editor ***only for download/upload comment functions*** (e.g. Excel)
- An IEEE account
    - IEEE Accounts are free and do not require IEEE membership.
    - If you do not have an IEEE account, create one by going to: https://www.ieee.org/profile/public/createwebaccount/showRegister.html

2 Getting Started

2.1 Accessing myProject for the First Time.

Applicable Users:

- All myProject users

Instructions:

1. Go to https://development.standards.ieee.org/my-site
    - If you already have an IEEE account, click "Sign In" and enter your credentials.
    - If you do not have an IEEE account, click "Create Account" to create a new one.

2.2 Accessing/Updating myProject Account Information

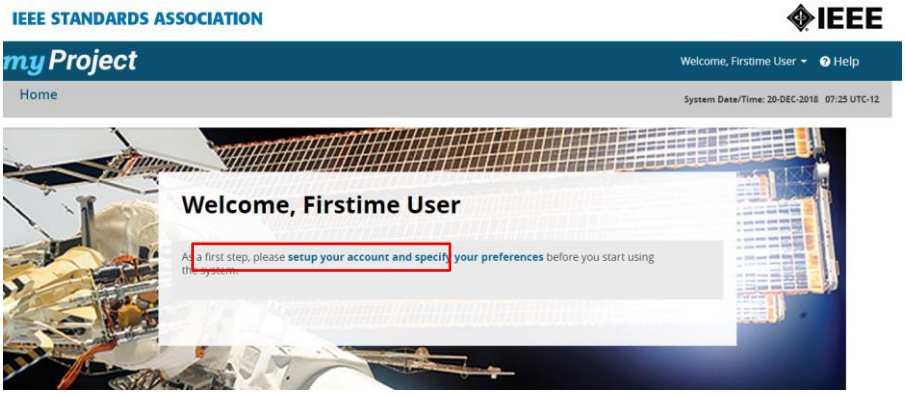
Applicable Users:

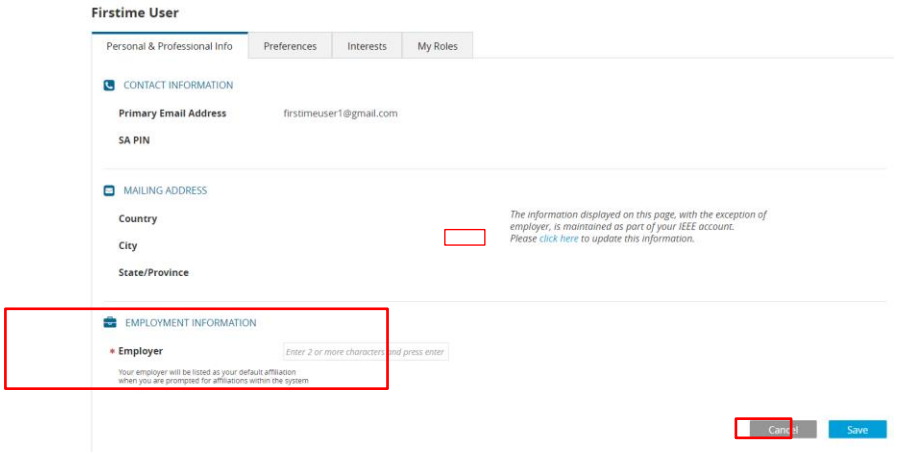
- All myProject users

When you access myProject for the first time, you will be prompted to set up your account and specify your preferences. This information is used by the system to notify you of events and tasks, as well as to automatically add your information to some fields, and is maintained separately from your IEEE Account information.

Instructions:

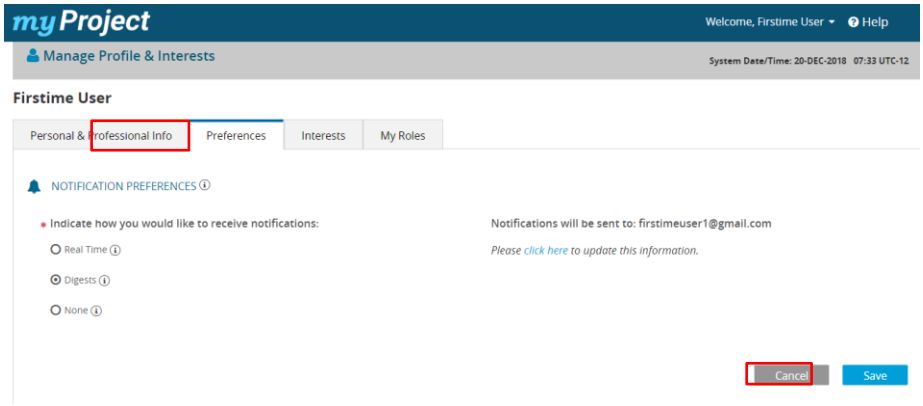
1. Click on **setup your account and specify your preferences.**
2. On the **Personal and Professional Info** tab, verify your primary email address and mailing address. These fields may be blank if you have not previously created an IEEE Account. If you need to change this information, click on the **click here** link.
3. Enter your **Employer information**. *(you can select your employer from the list, or type it in if it isn't visible*). This is a required field.





4. On the **Preferences Tab**, review and update how you would like to receive email notifications.

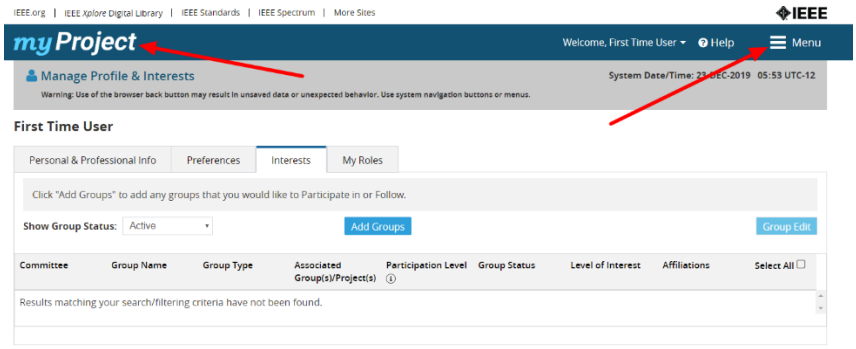
   NOTE: Click the ⓘ information icon next to each option for a description.



5. Click **Save**. The **Interests Tab** will appear.

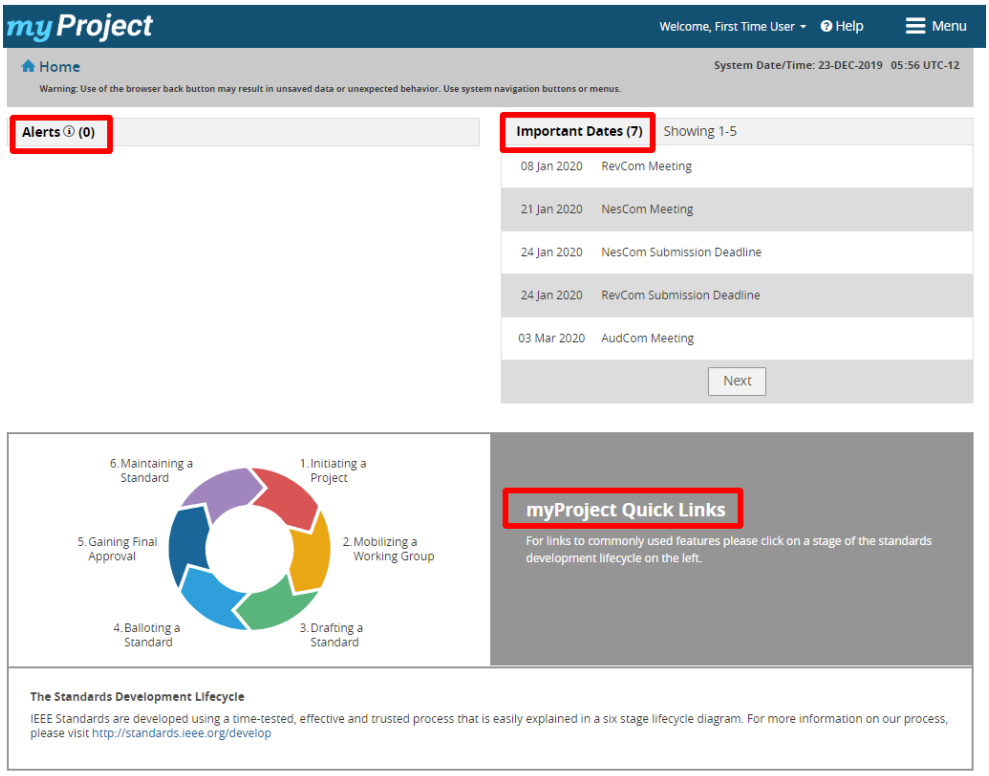
   NOTE: The Interests Tab allows you to indicate the groups you would like to participate in or follow. (See **Section 3 Manage Profile and Interests** for detailed instructions.)

6. Click on **myProject** in the title bar to access the **myProject** home screen or click **Menu** and click on the **Home** link.



2.3 The myProject Home Screen

The following features are available to all users. Additional features may be available to you based on your specific role and will appear in the lower section.



Alerts: This section shows messages regarding things happening within a group or a project you are managing, following or participating in. All alerts require the user to take an action, which can be completed by clicking on the alert text.

Important Dates: This section shows important IEEE Standards Association Standards Board meeting and deadline dates.

myProject Quick Links: This section displays a view of the IEEE standards development process. By clicking on different steps of the process, you can navigate to relevant parts of the application.

3 Manage Profile and Interests

3.1 Follow/Register as an Interested Party (Standards Committee, Working Group, Project)

Indicating interest in an activity allows you to receive ballot invitations and other notifications. Indicating interest also adds you to the roster and allows the chair to assign involvement levels and group roles. Working Group officers will also be notified when you register interest to participate in the group.

Applicable Users:

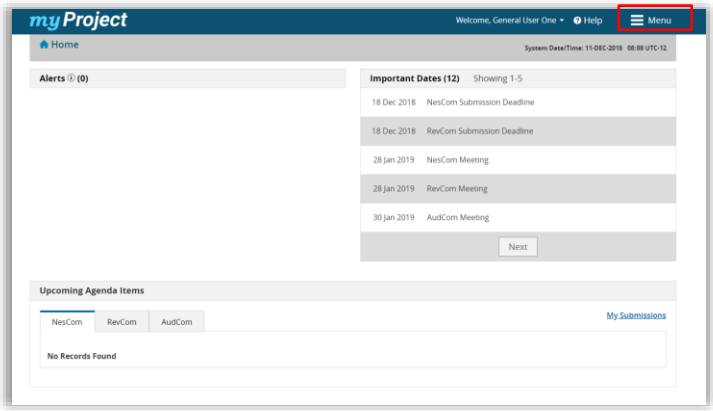
- All myProject users

Notes:

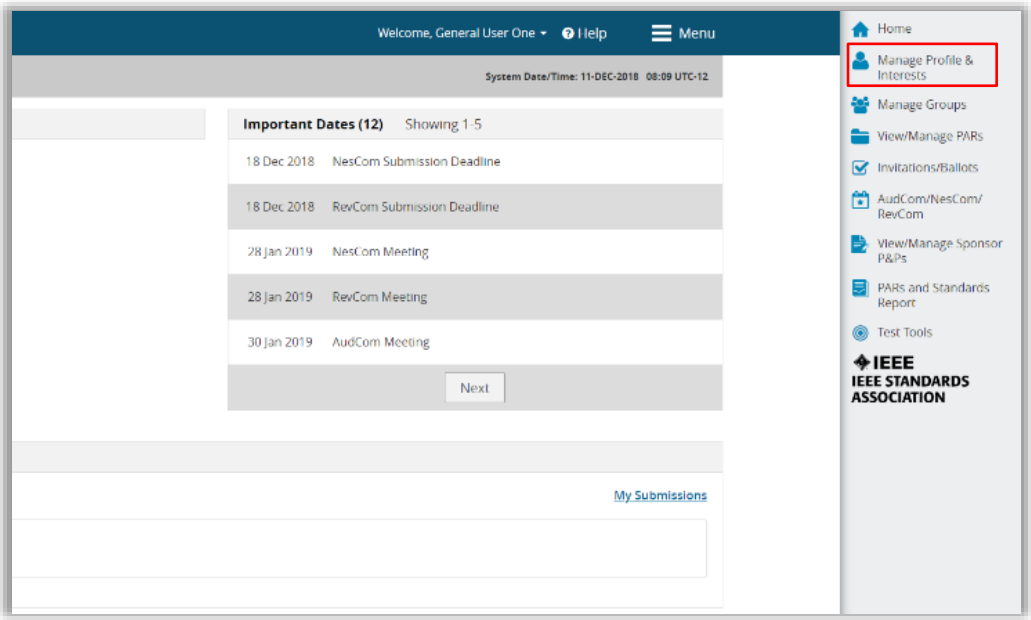
- IEEE SA Basic Corporate membership or above is required to observe an entity project.
- Only IEEE SA Advanced Corporate Members can contribute and hold voting privileges in entity working groups.

Instructions:

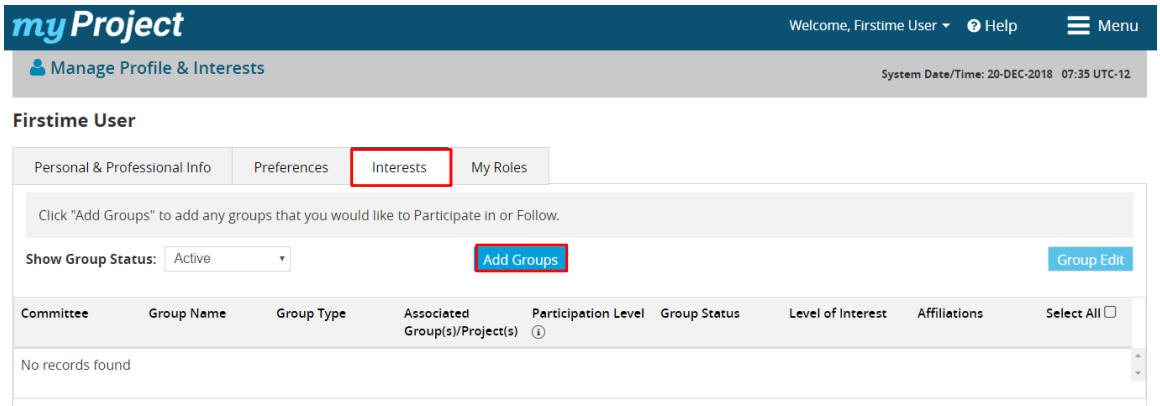
1. On the **myProject** Home Screen, select **Menu.**



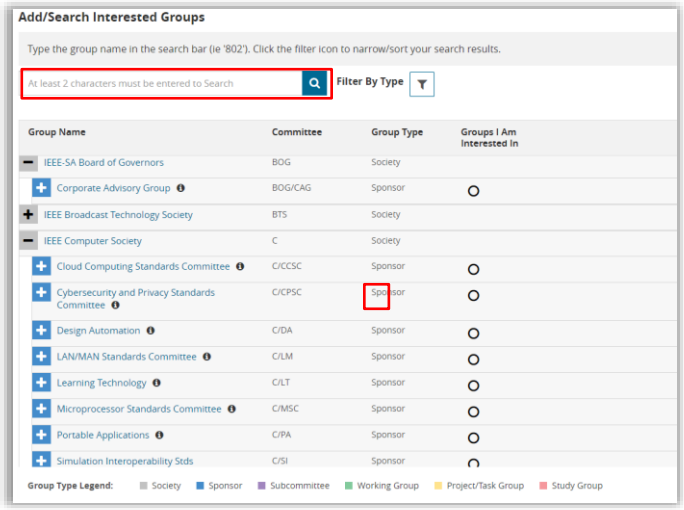
2. Click on **Manage Profile and Interests**.



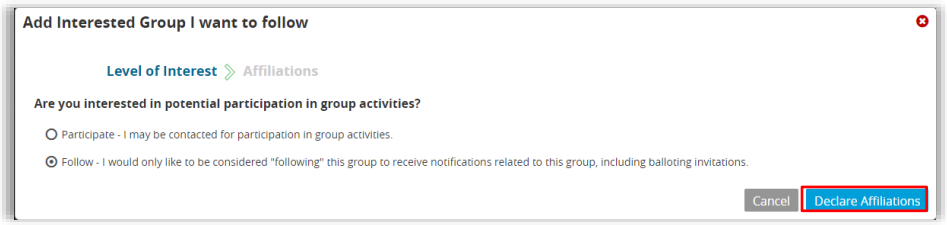
3. Click on the **Interests** tab
4. Click **Add Groups**.



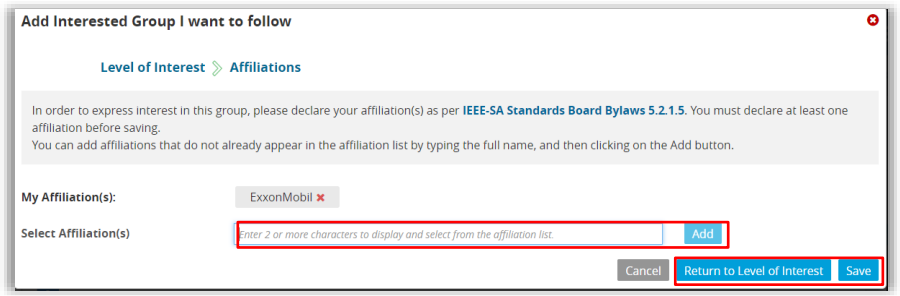
5. On the **Add/Search Interested Groups** screen, expand the **Group Name** list by clicking the "+" or use the Search box to find the desired group.
6. Click in the **Groups I am Interested In** column to indicate interest in a group.

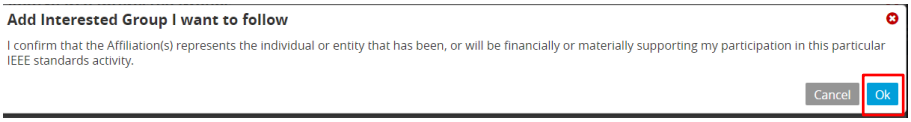


7. On the **Add Interested Group I want to follow** screen, indicate if you want to **Participate** or **Follow** the group.
8. Click **Declare Affiliations**.

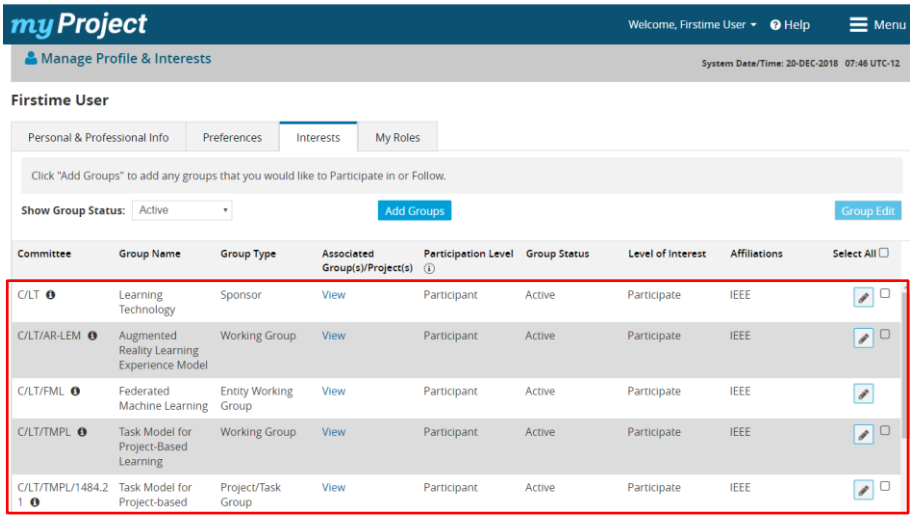


9. On the next screen, confirm your current affiliation and add additional affiliations as necessary. **NOTE**: The first time you access myProject, you will be required to declare an employer, which will be used as your default affiliation. You can declare a different affiliation for each group you indicate interest in. Select the company name from the drop down or click in the box, type the name of the company and click **Add**. The box will accept any text entered and an organization does not need to be in the dropdown to be used as a valid affiliation.
10. Click **Save** or **Return to Level of Interest** to change your selection.
11. Click **OK**.





12. Click **Done**. The groups you indicated interest in will appear on the Interests Tab.



3.2 *Update Affiliation Information*

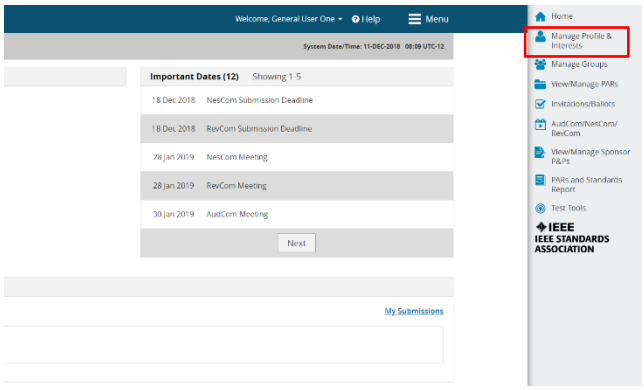
Use this function to manage your affiliation for each project/PAR. An individual can be affiliated with different entities on different PARs. See affiliation guidelines at http://standards.ieee.org/faqs/affiliation.html

Applicable Users:

- All myProject users

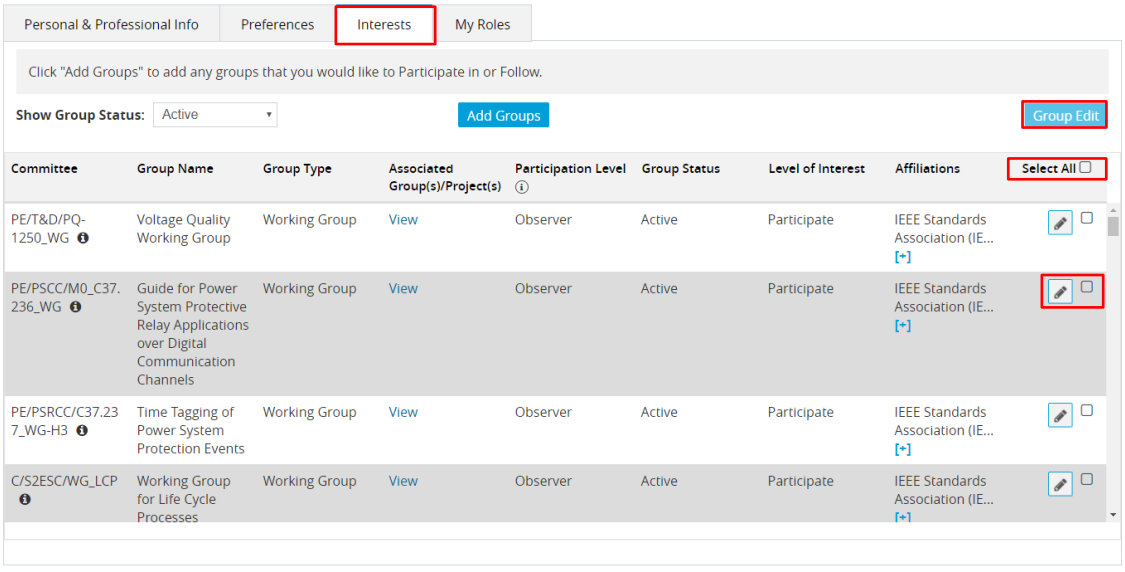
Instructions:

1. On the **myProject** Home Screen click the **Menu** link in the upper right.
2. Click the **Manage Profile and Interests** link.

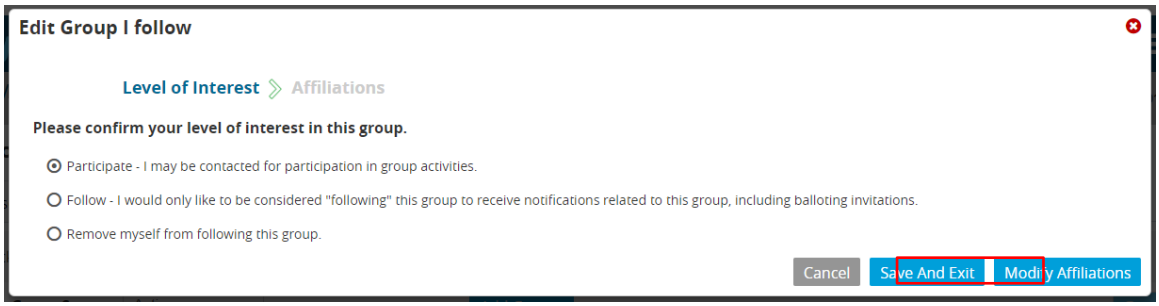


3. Click on the **Interests** tab.
4. To change your affiliation for one group, click on the **Edit Interest Icon** for that group. To change your affiliation for more than one group, click the indicator check box next to the desired groups or click the **Select All box** and click **Group Edit**. The **Edit Group/Bulk Edit Group I follow** window will appear.

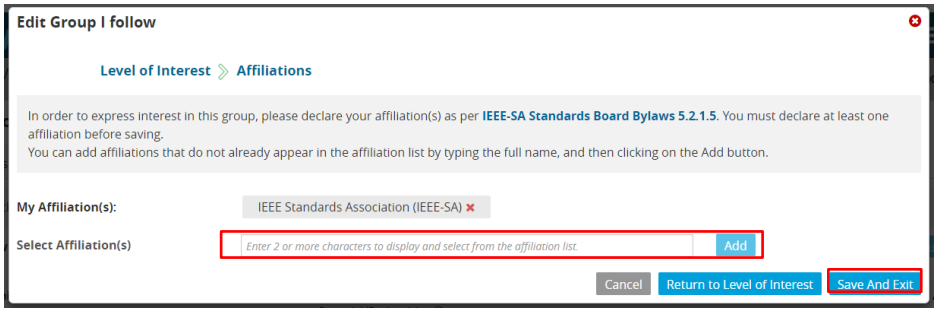
NOTE: Entity affiliations cannot be changed using the Group Edit function



5. Click **Modify Affiliations**



6. In the **Select Affiliation**s field, either choose the company name from the list or type it in and click **Add**.
7. Click **Save and Exit.**
8. Click **OK.**



3.3 *Entity Members and myProject*

Management of entity roles (DR/DRA & EBR/EBRA) is done by the EMR (Entity Member Representative). Other information for Entity Membership is not managed through myProject and is obtained from the MemberClicks database. This information includes: The name of the organization, the username of the EMR and the type of entity membership (basic or advanced). ARE WE KEEPING?

3.4 *View Individuals*

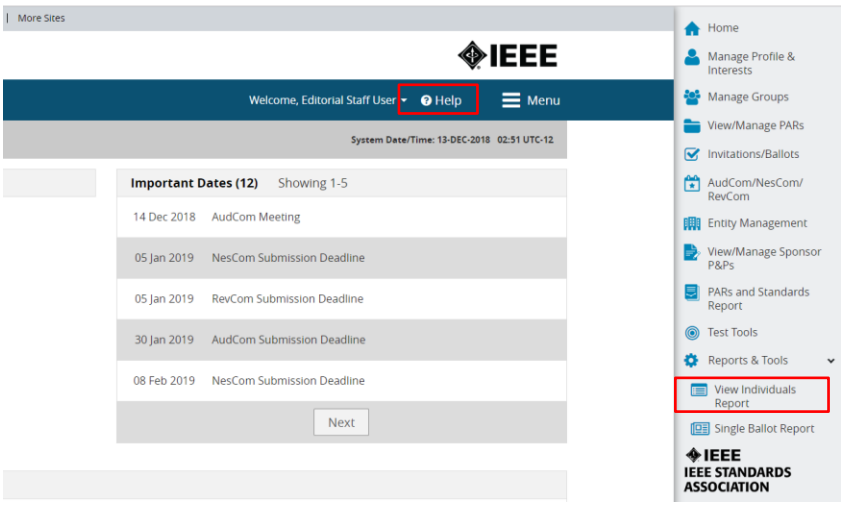
This feature shows a read-only list of all myProject users along with Usernames, contact information and IEEE Member Number.

Applicable Users:

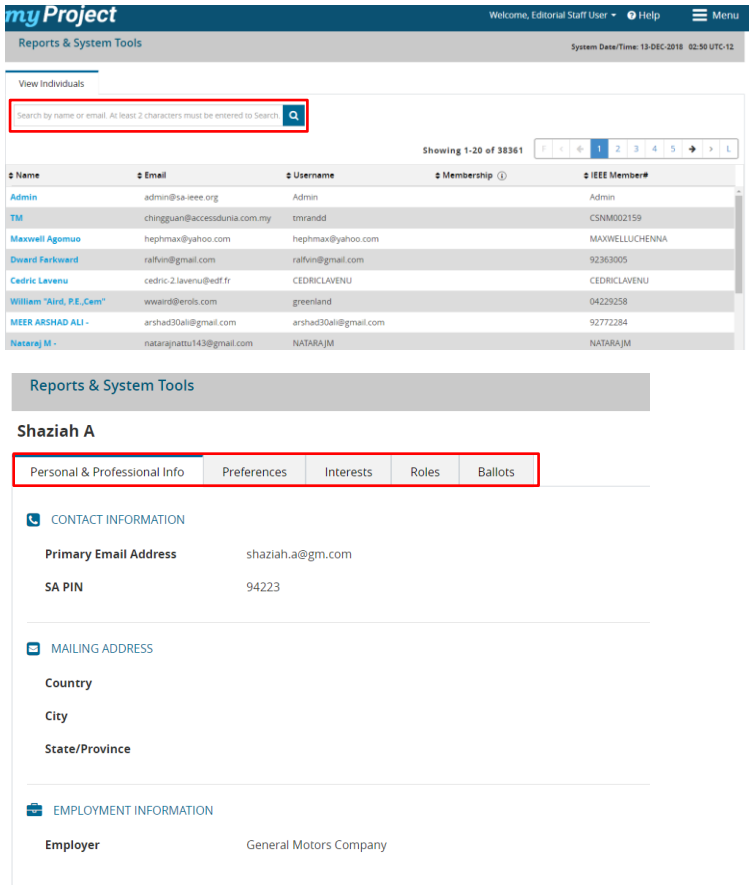
- General Staff (View Individuals), Staff Admin (View Individuals)

Instructions:

1. On the **myProject** Home Screen click **Menu.**
2. Click **View Individuals Report.**



3. To search for a particular individual, type all or a portion of their name into the Search box and click **Search icon**.
4. Click on a name to see Personal & Professional Info. Click on the other tabs to see preferences, interests, roles and ballots for that individual.



3.5 *Manage SASB Committee Rosters*

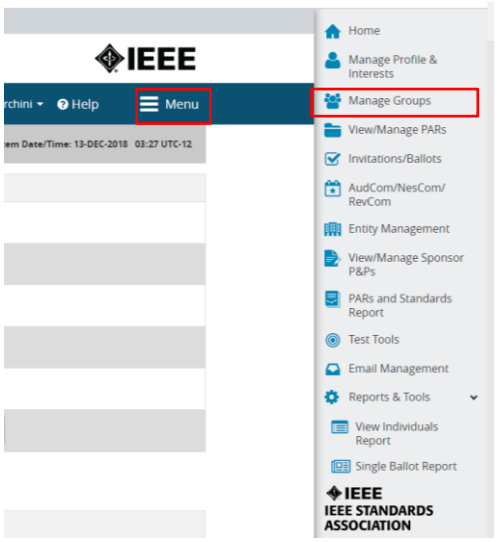
This function allows governance staff to manage rolls for SASB committees NesCom, RevCom, AudCom.

Applicable Users:

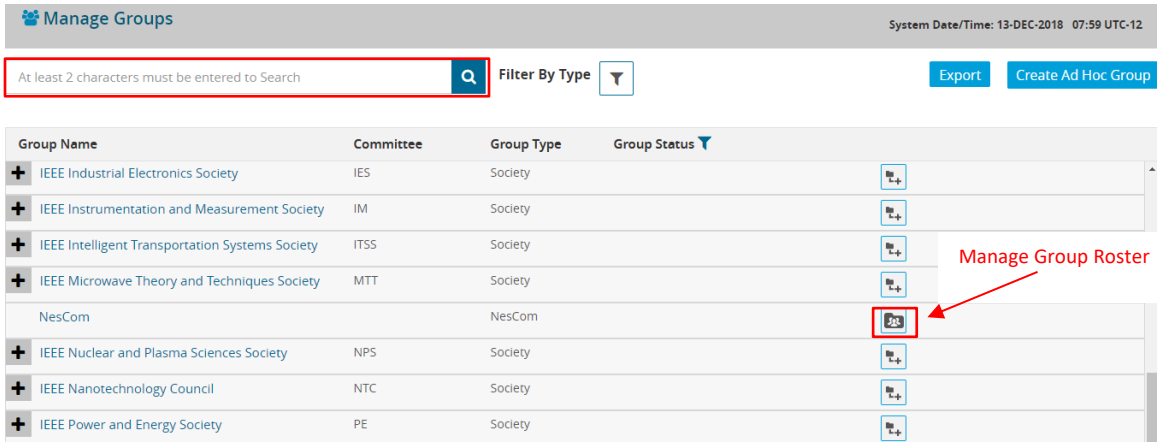
- Governance Staff

Instructions:

1. On the **myProject** Home Screen click **Menu.**
2. Click **Manage Groups.**

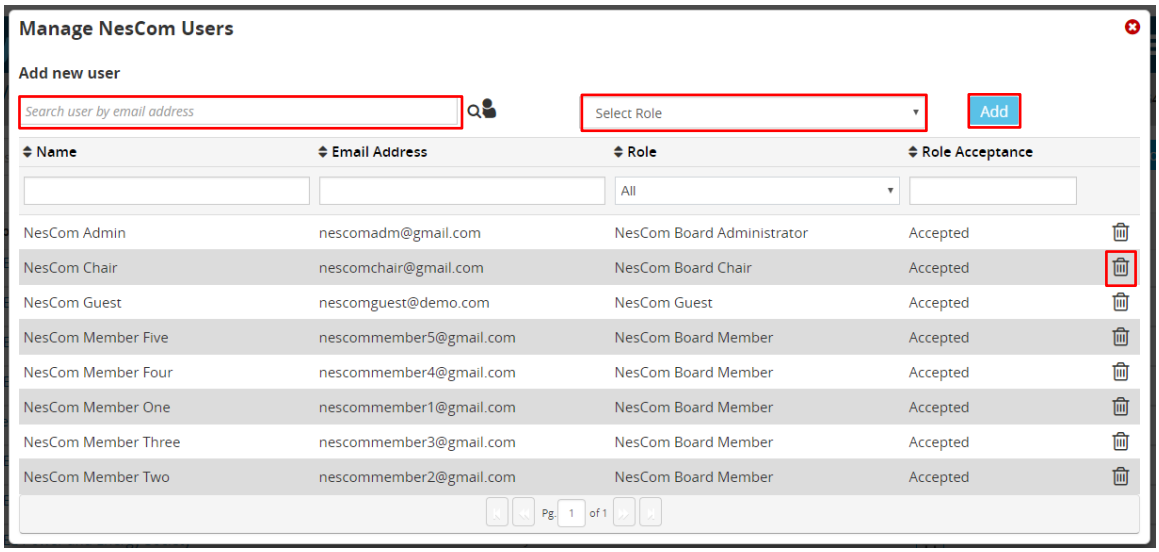


3. Use the **Search** window to find the desired group.
4. Click the **Manage Group Roster** icon.



On the Manage Users screen, administrators can add a new user, update roles for existing users and view role acceptance. Search for users by name, email address or role.

5. To add a new user, type the user's email address in the **Add new user** box and click the **search icon** . The system will verify the address and display it in a box below the search field.
6. Click on the **name of the user** to add it to the Add new user box.
7. From the **Select Role** drop down, choose a role for the new user.
8. Click **Add**. The new user will appear in the list.
   NOTE: The new member will receive an alert requesting they accept/decline the role they've been assigned. The member's Role acceptance will be listed as Pending until they respond to the alert.
9. To remove a user, click the **Trashcan icon** at the end of the row.



3.6 Manage Staff Users

This function allows administrators to grant staff permissions to any user.

Applicable Users:

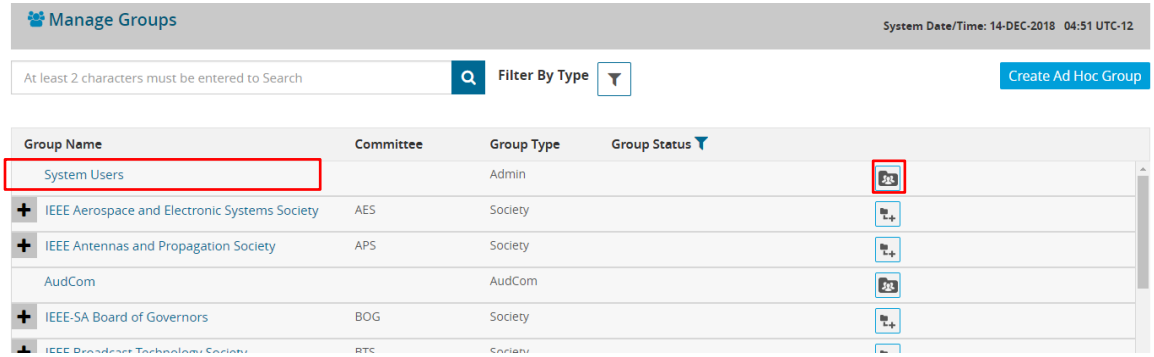
- Staff admin

Notes:

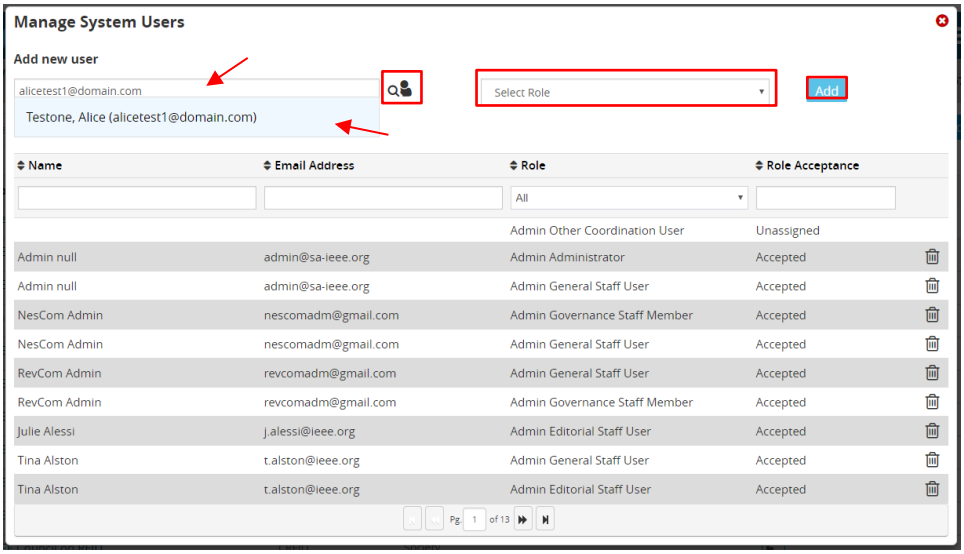
- The "General Staff" permission grants read-only access to all PARS, Ballots, Meetings, Organizations and Users.

Instructions:

1. On the **myProject** Home Screen, click **Menu**.
2. Click **Manage Groups**.
3. Locate the System Users Group at the top of the Group list and click on the **Manage Group Roster** icon. The Manage System Users screen will appear.



4. On the Manage System Users screen, type the email of the new user into the **Add new user** box. The system will verify the address.
5. Click on the **name** of the new member to enter in the **Add new user** field.
6. In the **Select Role** drop down, choose a role for the new user.
7. Click **Add**. The new user will be added to the list.



3.7 Manage Program Managers

Applicable Users:

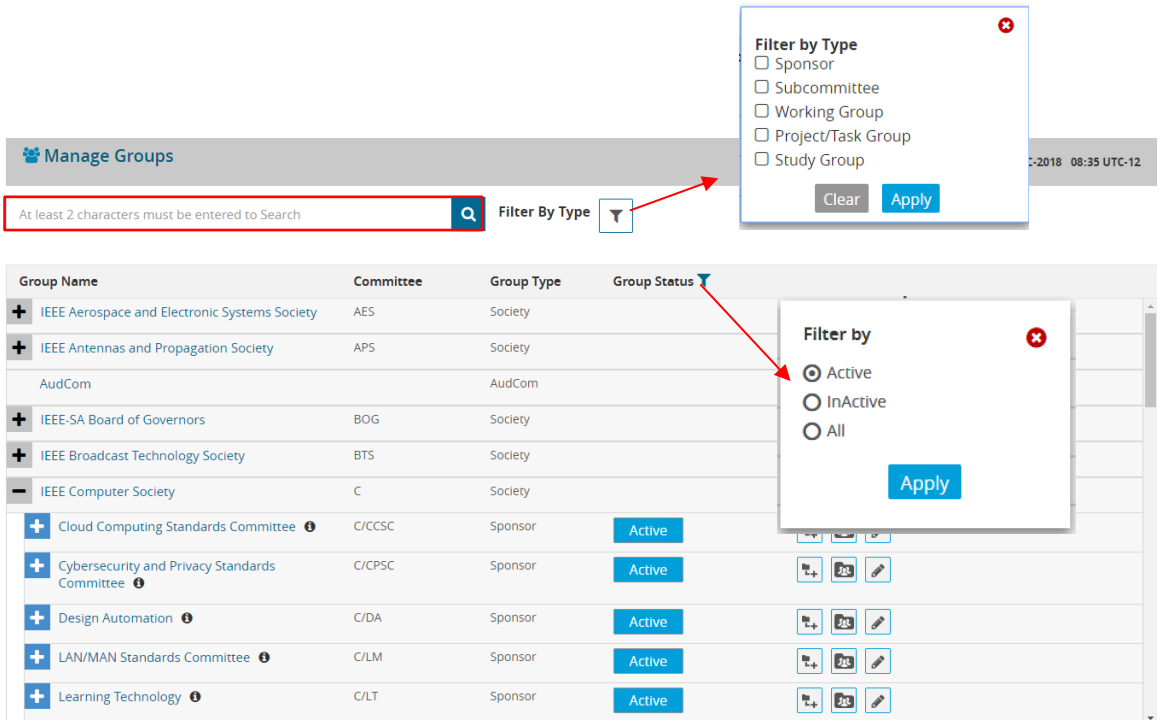
- Program Management Manager

Notes:

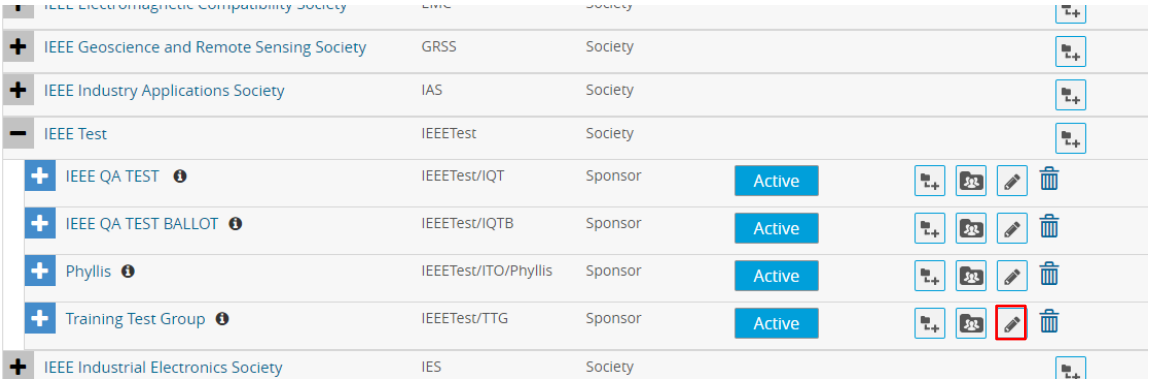
- Program Managers can be assigned at the Standards Committee, Subcommittee, Working Group, and Project levels. New committees and projects will inherit the program manager of the parent committee unless one is specifically designated at the lower level.
- Alternate Program Managers have the same permissions as primary, but will not be listed in group info and will not receive emails or alerts related to that group.

Instructions:

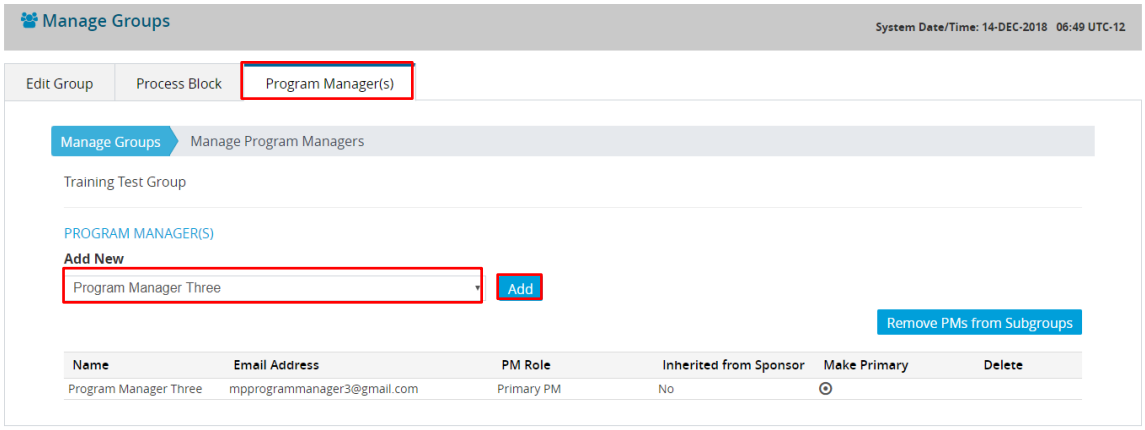
1. On the **myProject** Home Screen, click **Menu**.
2. Click **Manage Groups**.
3. Search for group by typing at least 2 characters into the search window or click the **Filter by Type** button to search for by type of group. Use the **Group Status** filter button to filter by **Active or InActive status**.



4. After locating the group, click on the **Edit Group Details** icon.



5. Click on the **Program Manager(s)** tab.
6. From **the Add New** drop down list, choose the desired program manager's name.
7. Click **Add**
8. Click **OK**. The program manager will appear in the list.
   NOTE: Additional program managers can be added but there is only one primary program manager. Click Remove PMs from Subgroups to remove all Project Managers from subgroups of the group being edited.



3.8 Entity Management - Staff

The Entity Management tool can be used to view all organizations that have been entered into myProject as an employer, affiliation, or entity member.

3.8.1 *View, Modify and Approve Entities*

Applicable Users:

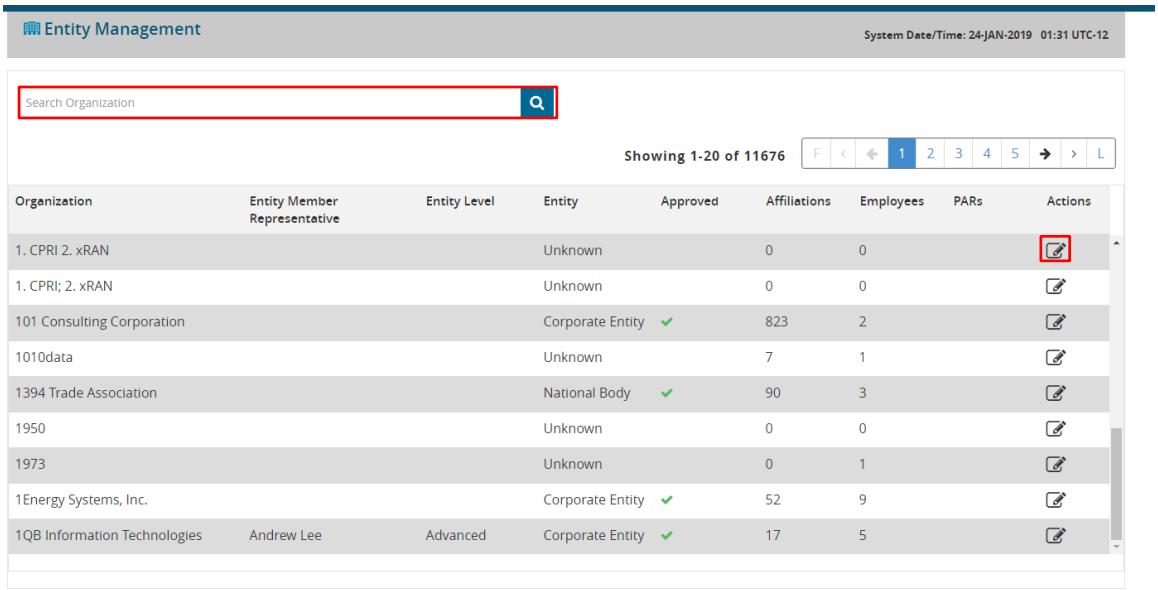
- Staff Admin

Notes:

- In order for an entity it to show up as a choice when users enter affiliation and employer information, the Staff admin must approve the entity using the Entity Management feature.
- The Staff Admin can edit the name, organization type, and organization URL of an entity.

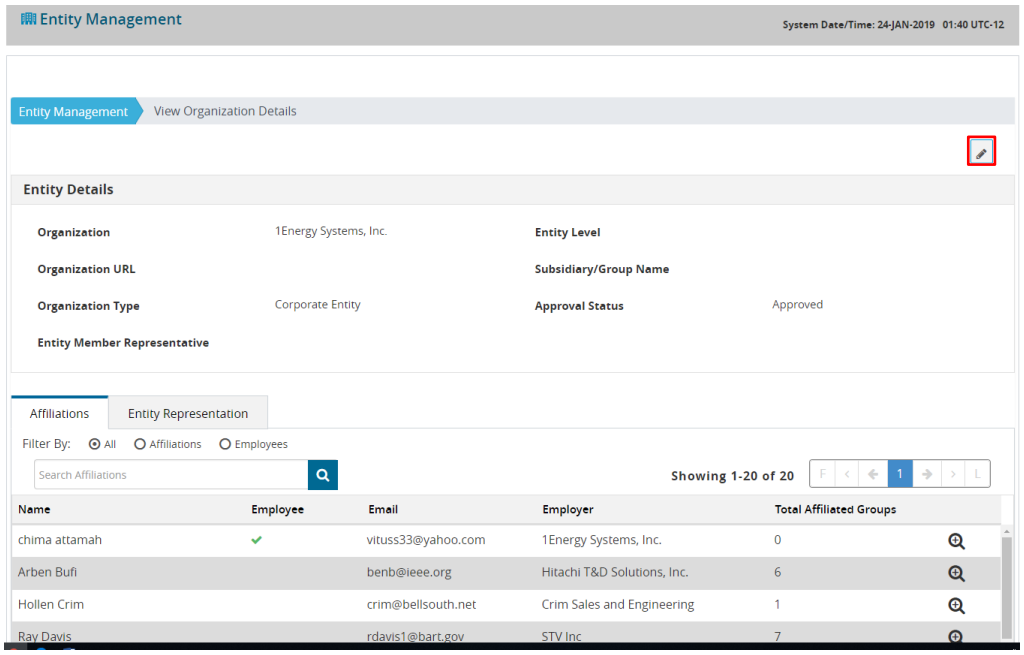
Instructions:

1. On the **myProject** Home Screen, click **Menu**.
2. Click **Entity Management.** By default, all organizations that have been entered into myProject as an affiliate will be listed.
3. Type an entity name into the search box and click the search icon to search for an organization you want to view or edit.
   NOTES:
   a. The number in the **Affiliations** column represents the total number of times users indicated they were affiliated with this entity.
   b. The number in the **Employees** column indicate the number of user who have listed this entity as their employer.
4. Click the **Edit** icon next to the name of the entity you wish to view or edit.



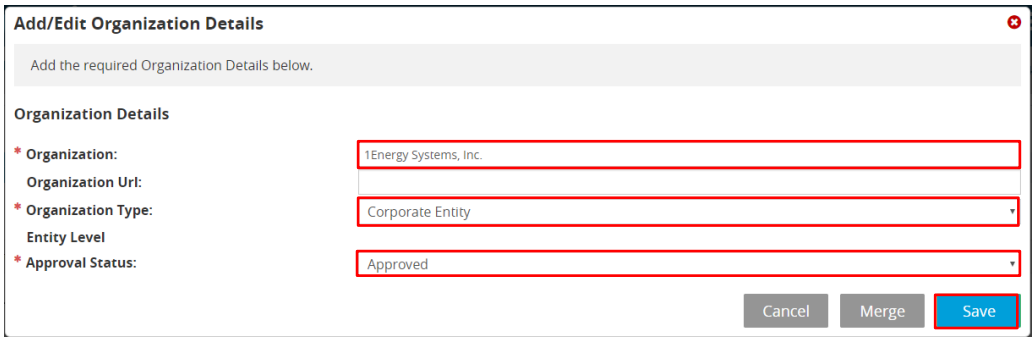
The View Organization Details screen displays the Entity details as well as a list of those who have indicated their affiliation with this entity.

5. Click the **Edit** icon to edit the organization's details including Name, Organization Type, Organization URL and Approval Status.



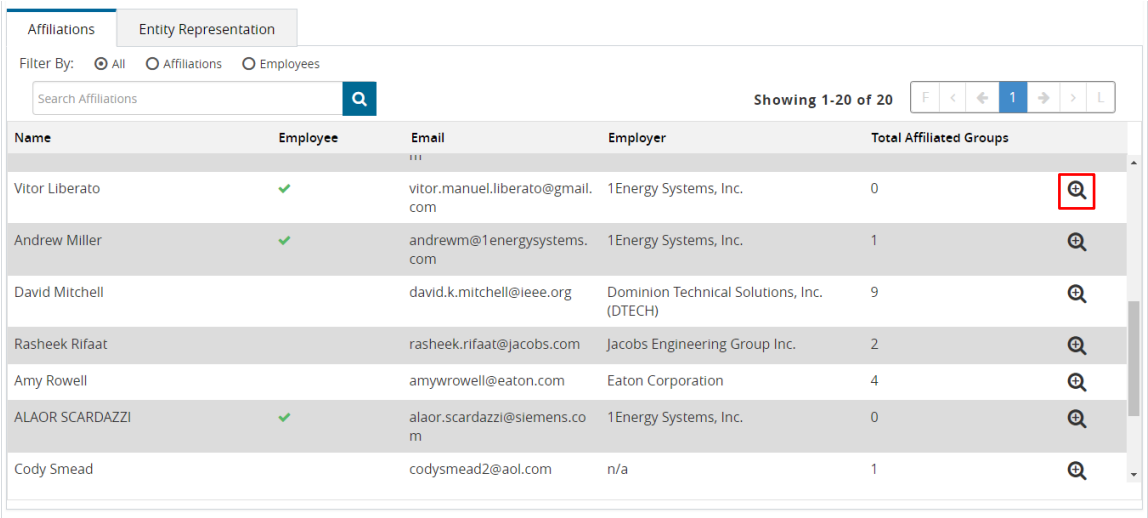
6. Enter the desired changes and click **Save**.

NOTE: Changing an organization's status to **Approved** will allow it to show up as a choice when users enter affiliation and employer information.

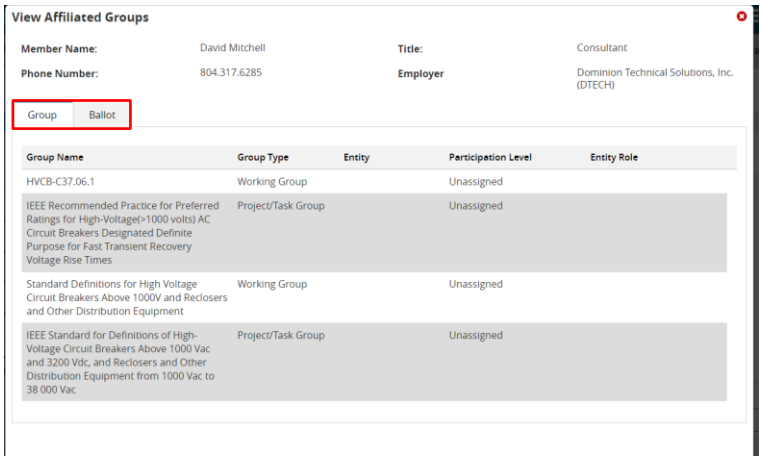


The View Organization Details screen also displays additional information about individuals and their affiliations.

7. Click the magnifying glass icon to the right of the individual's name to see more details regarding his or her affiliations.



8. The **Group** tab displays the groups this individual has joined. The **Ballot** tab displays the projects this individual is participating in.



3.9 Entity Management – EMR

An Entity Member Representative (EMR) will use the Entity Management feature to view details about the organization they represent and manage the ballot group members for ballots associated with that organization.

3.9.1 Manage Ballot Group Members

An EMR can remove and change the role of ballot group members for their organization.

Applicable Users:

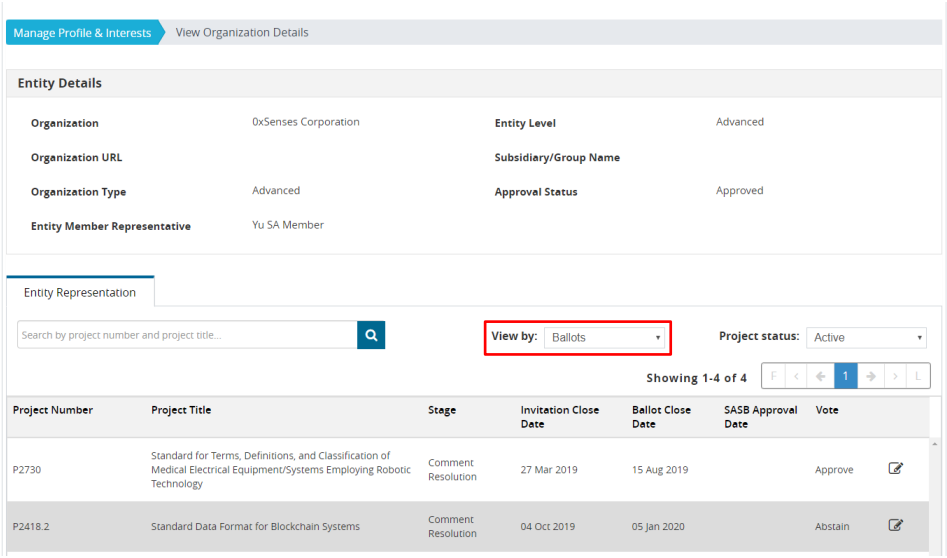
- EMR

Notes:

- EMRs will automatically be added to the representatives waiting list and can assign themselves to the EBR or EBRA role if necessary

Instructions:

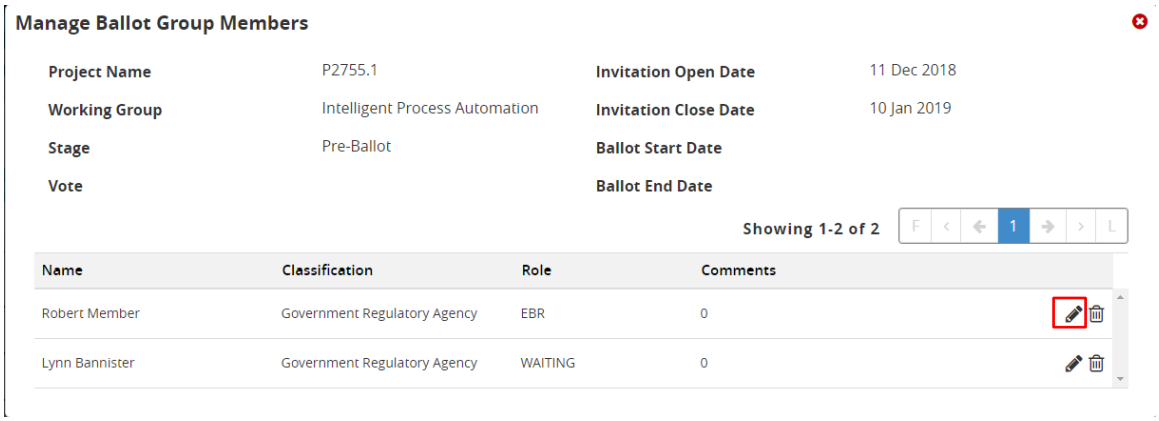
1. On the **myProject** Home Screen, click **Menu.**
2. Click **Entity Management**.
3. Select **Ballots** from the **View By** Dropdown
4. The screen will show active ballots by default, You can view completed ballots by selecting **Complete** from the **Project status** dropdown



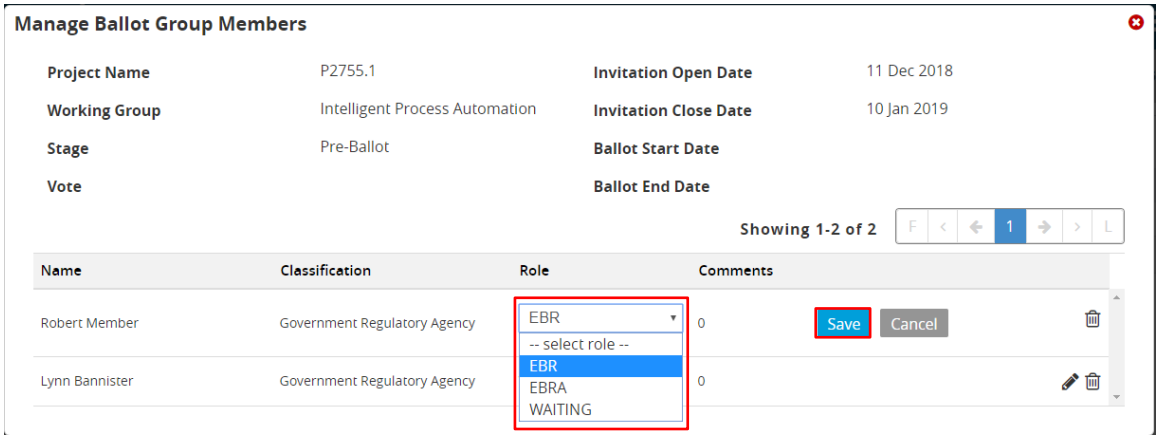
5. Use the **Search** box to locate the desired project.
6. Click the **Edit** icon.

7. On the Manage Ballot Group Members screen, click the **edit** icon next to the name of the member you wish to edit.

NOTE: To remove the member, click the **trash can** icon. You may not remove the EMR from the list. An EBR must be assigned to keep the entity in the ballot group.



8. Use the **Role** drop down to change the member's role and click **Save**.



4 Manage Groups

4.1 Create a Standards Committee Level Group

A Standards Committee level group is created under a Society level group. Society level groups can only be created by technical team and will require submission of a helpdesk ticket. A Standards Committee level group must be created before a Standards Committee committee can upload proposed P&Ps.

Applicable Users:

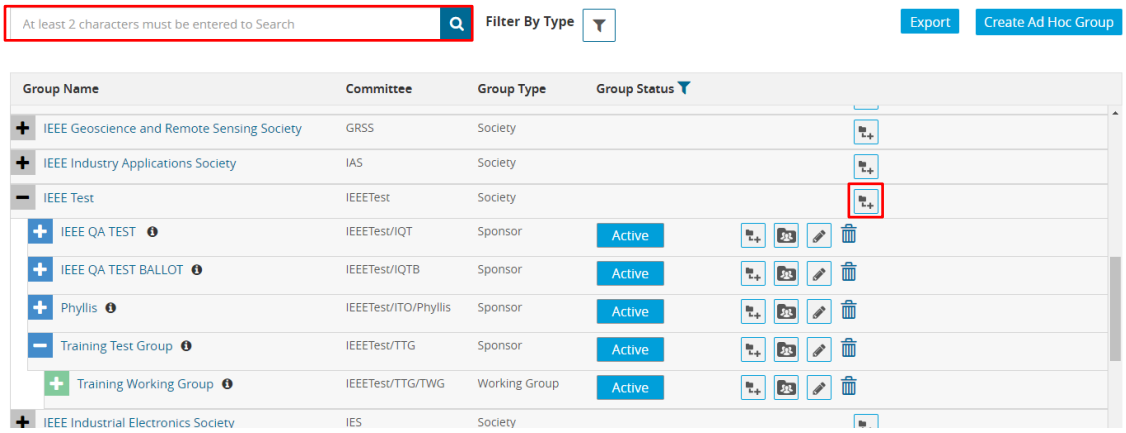
- Governance Staff

Notes:

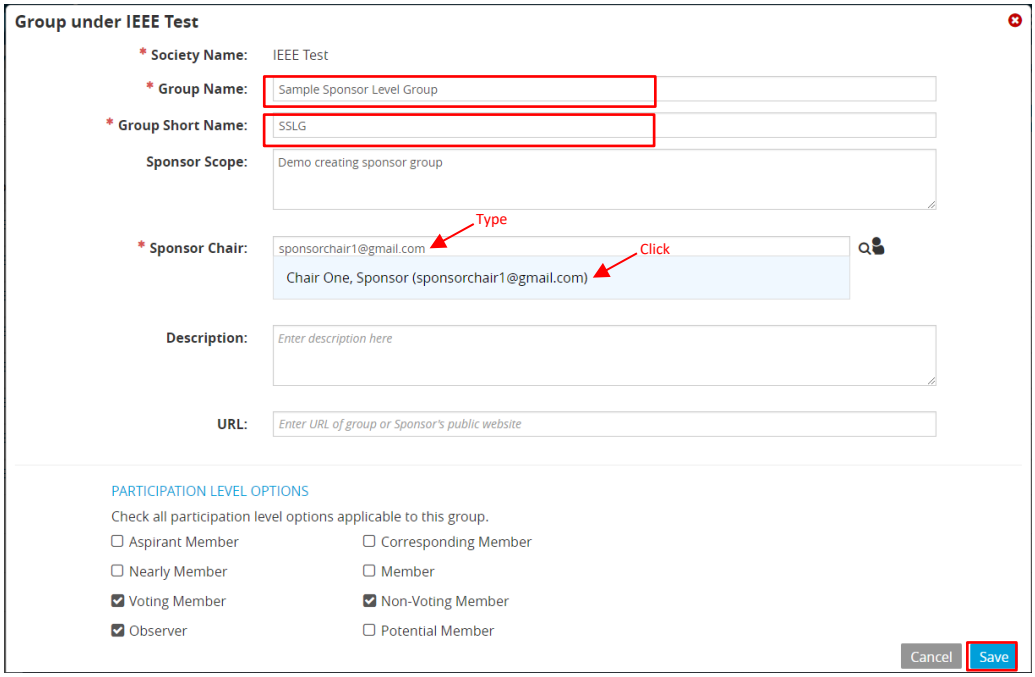
- A Standards Committee Chair must be assigned during the creation of the Standards Committee Group.

Instructions:

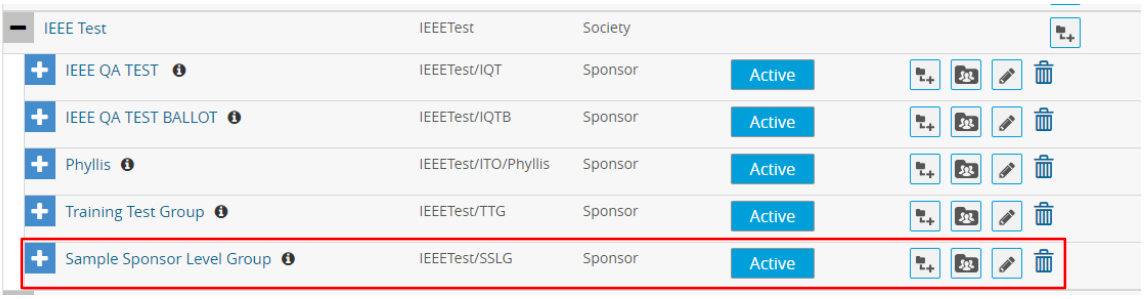
1. On the **myProject** Home Screen, click **Menu.**
2. Click **Manage Groups**.
3. Use the **Search** field to find the Society level parent group for the group you want to create.



4. Click on the **Add New Sub-Group** icon on the parent group row.



5. Enter a **Group Name, Group Short Name**, and optional Standards Committee Scope.
6. In the **Standards Committee Chair** field, type the email address of the person to be assigned as the Standards Committee Chair. The system will verify the address.
7. Click on the **name** of the person once the address has been verified.
8. Indicate the desired **Participation Level Options** applicable to the group.
9. Click **Save**. The new Standards Committee group will appear under the parent group.



NOTE: Once the Standards Committee group is created, sub groups including Subcommittees, Working Groups and Study Groups can be added using the **Add New Subgroup** icon.

4.2 Process Blocks

It may be necessary to block a group from submitting PARs or conducting ballots because P&Ps or necessary financial forms haven't been submitted or for other reasons.

Applicable Users:

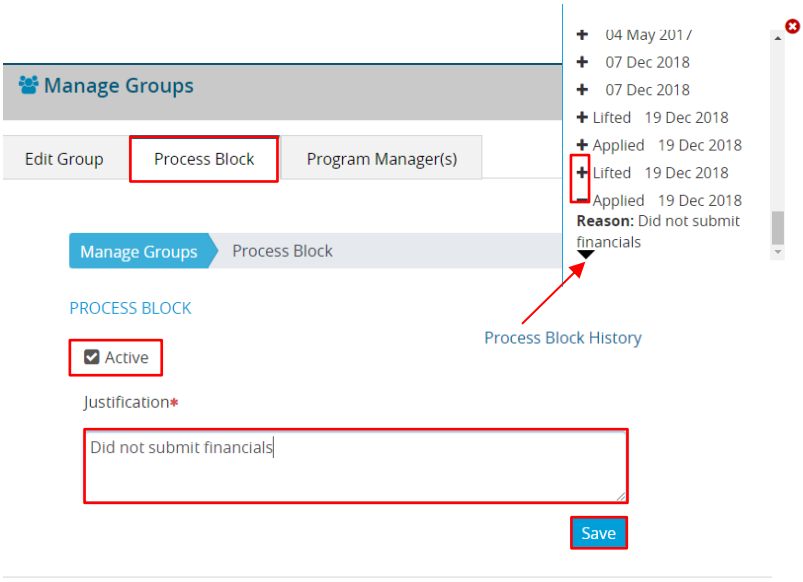
Governance Staff

Notes:

- Process blocks can only be applied at the Standards Committee level.
- You must provide a justification for placing *and* removing a process block.
- A record of process blocks for a group is available under Process Block History.

Instructions for applying a Process Block:

1. From the myProject home screen, select **Menu**.
2. Click **Manage Groups**.
3. Use the **Search** field, **Filter By Type** or **Filter by Group Status** options to locate the appropriate group.
4. Click the **Edit Group Details** icon.
5. Click the **Process Block** tab.



6. Enter the reason for the process block in the **Justification** box.
7. Click the **Active** check box to place the process block.

8. Click **Save**. Use the **Process Block History** feature to see the group's process block history. Click the + to see the reason for the block.

Instructions for lifting a Process Block:

1. Click on the **Process Block Tab**.
2. Deselect the **Active** check box.
3. Enter a reason for removing the block in the **Justification** box.
4. Click **Save**.

4.2.1 *Accept an Assigned Role*

Group officers and Standards Board committee members may be assigned by IEEE staff or other group officers. Once the assignment has been made, the member receives an alert requesting that they accept the role and agree to the data policy and officer TOS policy.

Applicable Users:

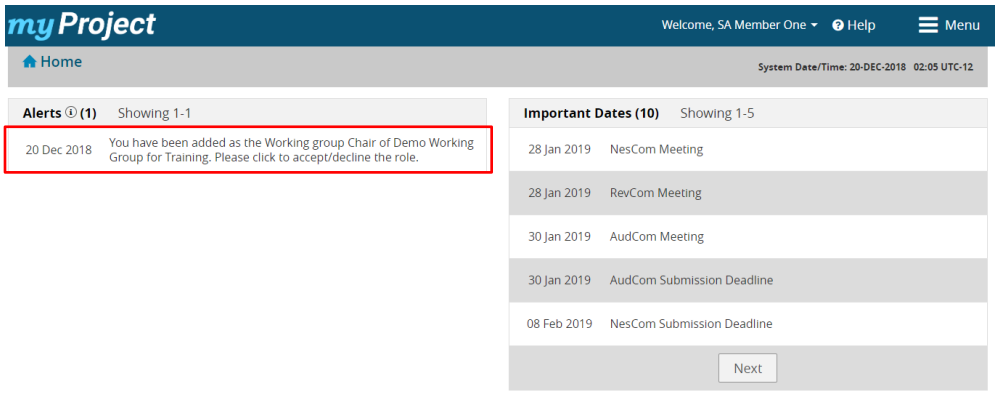
- Group officers, NesCom/RevCom/AudCom members

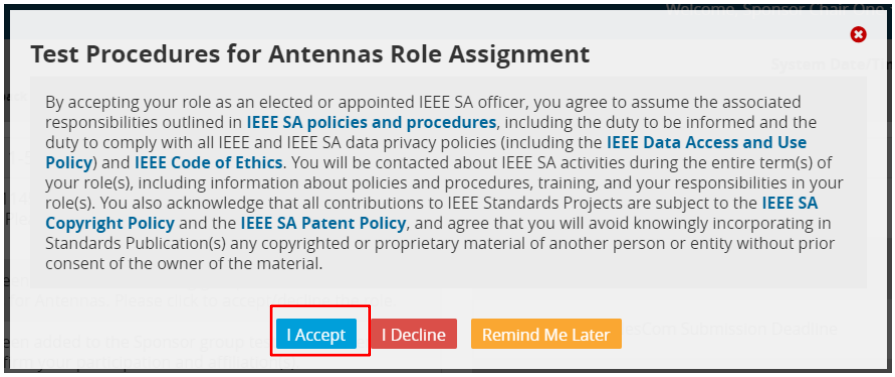
Notes:

- Users will not see permissions related to newly assigned roles until they complete the role acceptance.
- If the user has been newly added to a group with a pending affiliation, they must confirm their affiliation prior to accepting the officer role.

Instructions:

1. On the **myProject** homepage, locate and click on the alert that indicates that you have been assigned a new role.

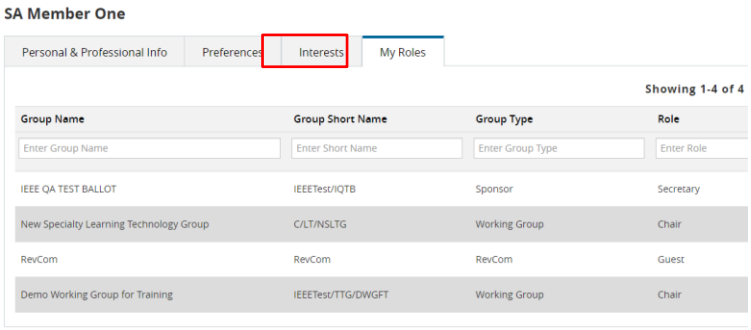




2. Click **I Accept**.
3. New permissions should be available to you at this time. If you are still not able to see necessary areas of the application, yo may need to log out and back in again.

NOTE:

- You can view all the roles you have been assigned by accessing the **My Roles** tab under **Manage Profile and Interests**.



4.2.2 *Creating Sub-groups*

Group officers have the ability to add subgroups to existing groups.

Applicable Users:

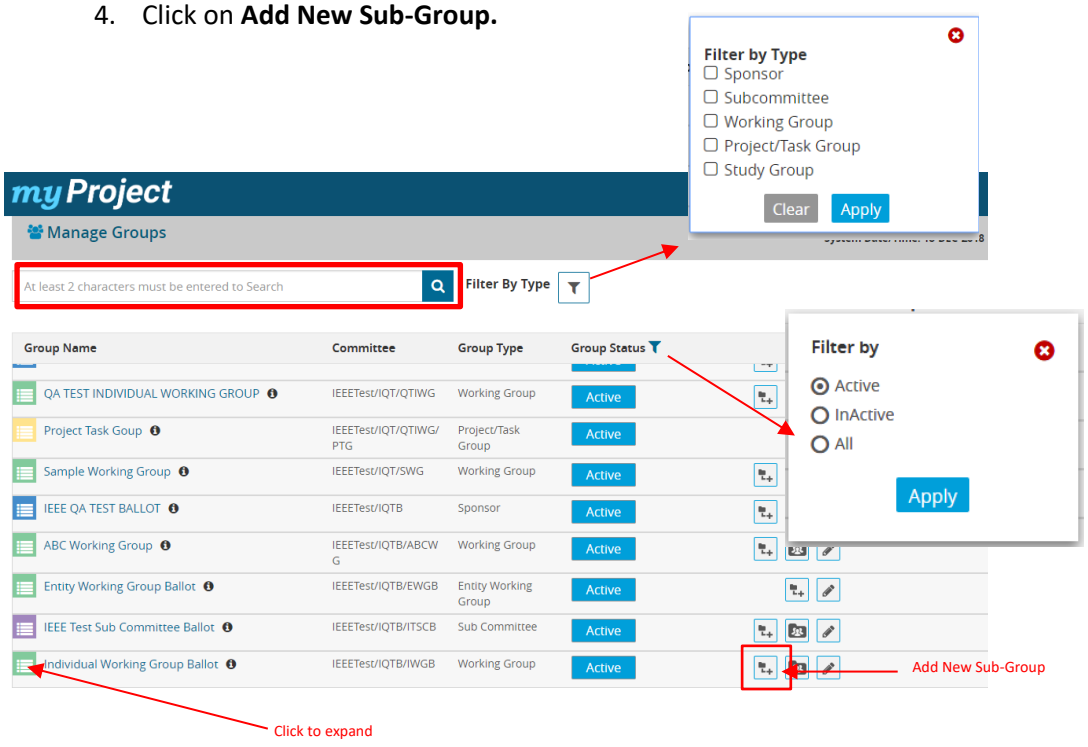
- Group Officers

Notes:

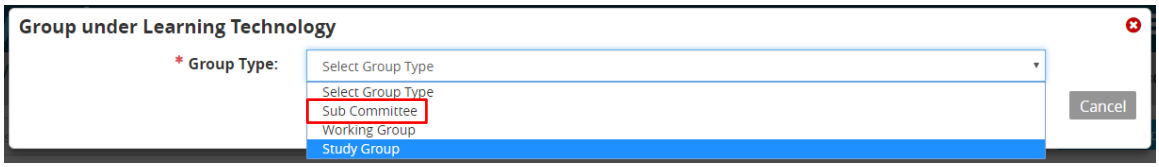
- Group officers can only add subgroups of groups they manage.
- A list of your assigned roles can be found on your **Manage Profile & Interests** screen under the **Roles** tab.

Instructions:

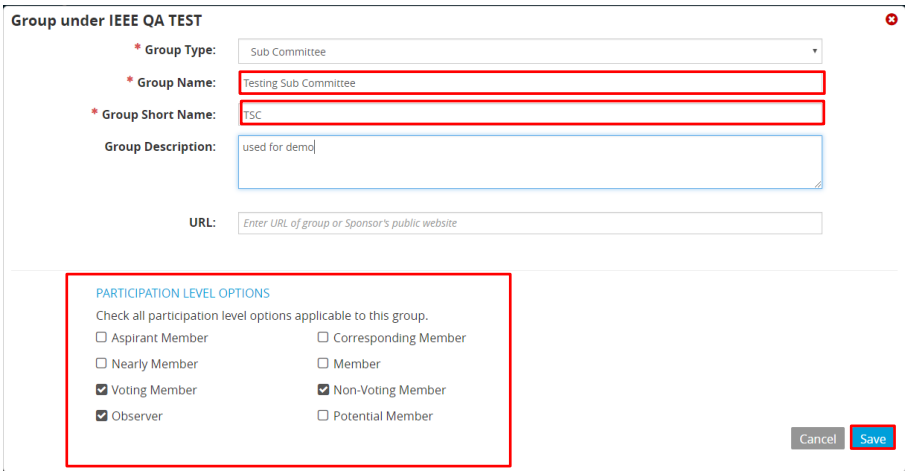
1. From the myProject home screen, select **Menu**.
2. Click **Manage Groups**. The groups the user has permissions to manage will appear.
3. Use the **Search** field, **Filter By Type** or **Filter by Group Status** options to locate the parent group of the new group. Click on the group icon to the left of the name of the group to see subgroups.
4. Click on **Add New Sub-Group.**



5. On the next screen, select a **Group Type** from the dropdown.



6. Enter the **Group Name, Group Short Name** and optional Group Description.
7. Indicate required **Participation Level Options**.
8. Click **Save**. The new group will appear in the group list under the parent group.



4.2.3 *Manage Group Rosters*

Applicable Users:

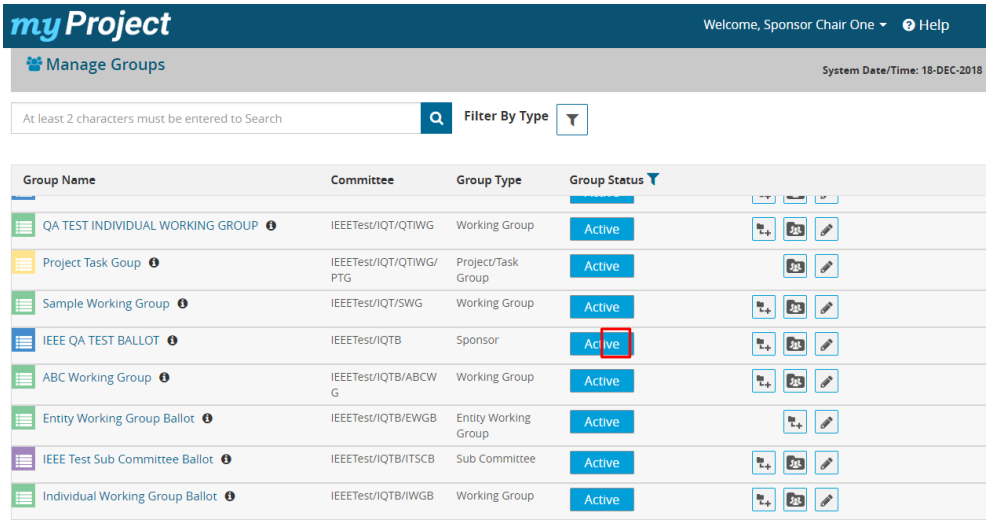
- Group Officers

Notes:

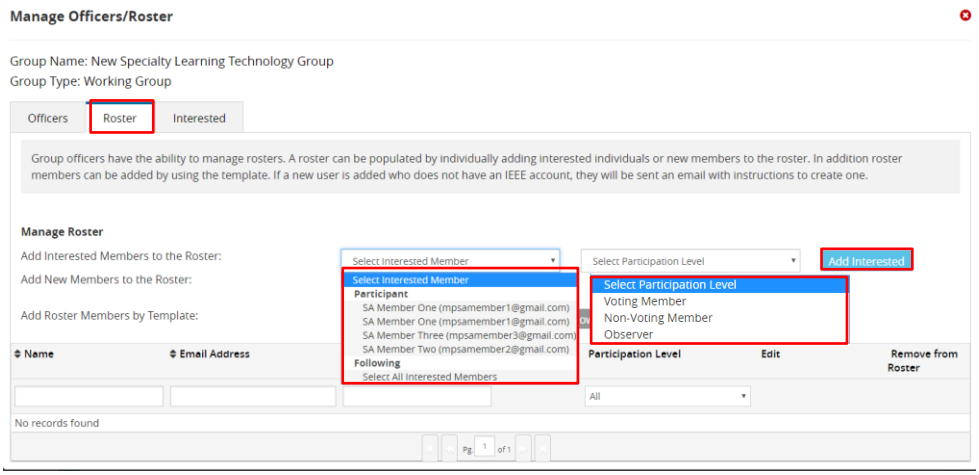
- Entity group rosters are only editable by IEEE staff at this time. Please contact your Program Manager for assistance.
- The Manage Officers/Roster screen contains three tabs:
    a. **Interested Tab**: Displays individuals who have indicated interest in the group you are managing.
    b. **Roster Tab:** Gives group officer ability to add members from the Interested tab to the group roster and assign a participation level. This is also where group officers can download a roster or template to facilitate bulk uploading of members.
    c. **Officers Tab:** Use to assign/modify the roles of the officers of an IEEE Project. In order to assign an officer role to a group member, the member must first be added to the group roster.

Instructions:

1. From the myProject home screen, select **Menu**.
2. Click **Manage Groups**.
3. Use the **Search** field, **Filter By Type** or **Filter by Group Status** options to locate the appropriate group.
4. Click the **Manage Group Roster** icon. The Manage Officers/Roster screen will appear.



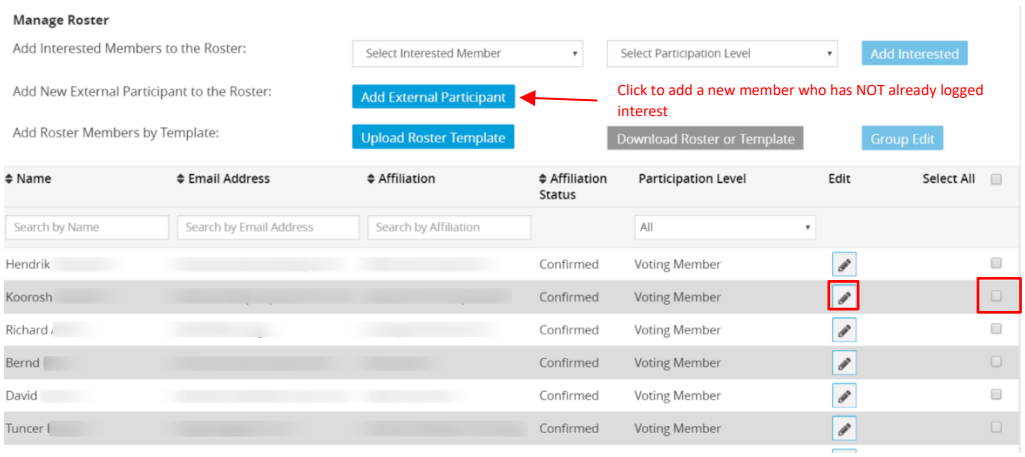
5. Click on the **Roster** tab.



6. From the **Select Interested Member** drop down, choose the name of the individual to be added to the Roster.
7. On the **Select Participation Level** drop down, choose the appropriate level of participation.
8. Click **Add Interested**. The newly added member will appear in the roster list. To change the participation level, click on the **Edit Participation Level** icon. To remove the member, click the **trash** can icon.
9. To modify the involvement level of a single user or remove them from the roster, click on the **Edit** pencil, select an option from the dropdown menu and click **Save**
10. To edit users in bulk, check the box next to the users you want to modify and click the **Group Edit** button.

Notes:

- To add a member to the roster who does not have an IEEE account, click the **Add External Participant** button. The person must have already agreed to the IEEE Privacy Policy.
- When a member on the Interested list is assigned a participation level, the name moves from the Interested list to the roster. If a member name is removed from the roster, it returns to the Interested list.
- Once added to the roster, an individual can be assigned an officer role.



4.2.4 *Modify Officer Roles*

After and individual has been added to the roster, they can be assigned an officer role.

Applicable Users:

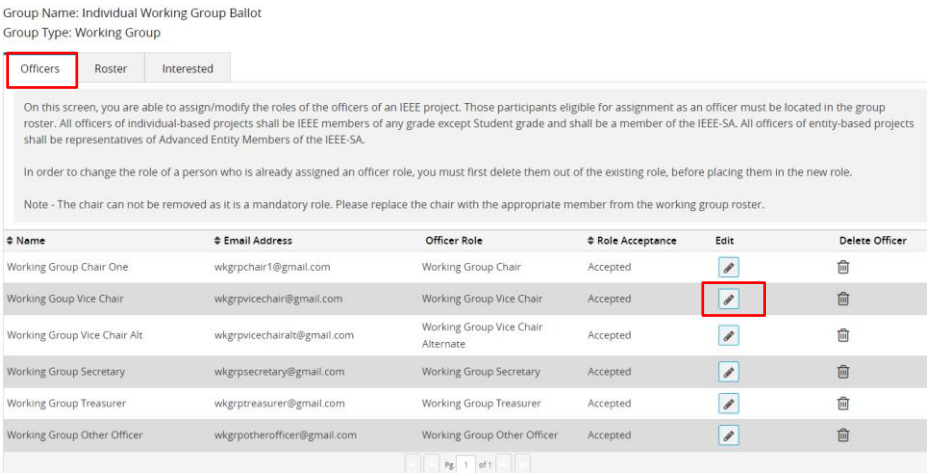
- Group Officers

Notes:

- All officers of individual-based projects shall be IEEE members of any grade except Student grade and shall be a member of the IEEE SA.
- All officers of entity-based projects shall be representatives of Advanced Entity Members of the IEEE SA.
- In order to change the role of a person who is already assigned an officer role, you must first delete them out of the existing role, before placing them in the new role.

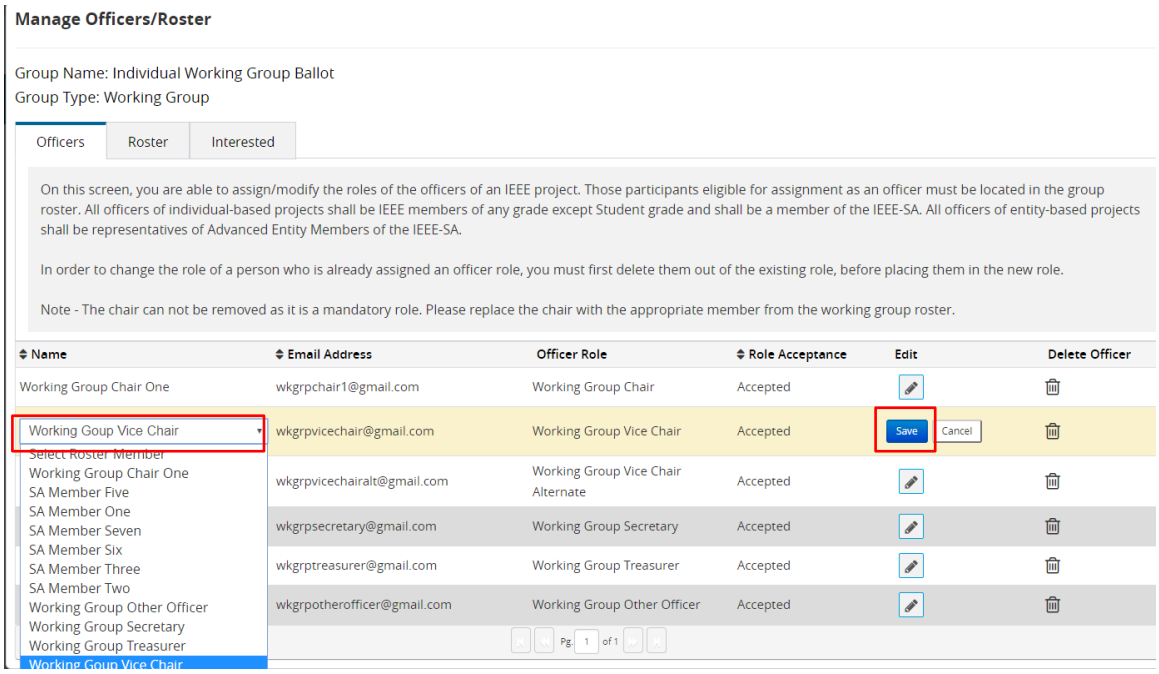
Instructions:

1. Click the **Officers Tab.**
2. Locate the name of the officer to be edited.
3. Click the **Edit** icon.



4. In the Name drop down, choose the user you intend to assign the officer role.

5. Click **Save**. The Role Acceptance column will change to *Pending* until the new officer accepts the role.



4.2.5 *Upload Roster Template/Download Roster or Template*

Group Officers can download a roster list, interested user list or a blank template as an Excel or CSV file. Lists of members can be uploaded and added in bulk to an existing group.

Applicable Users:

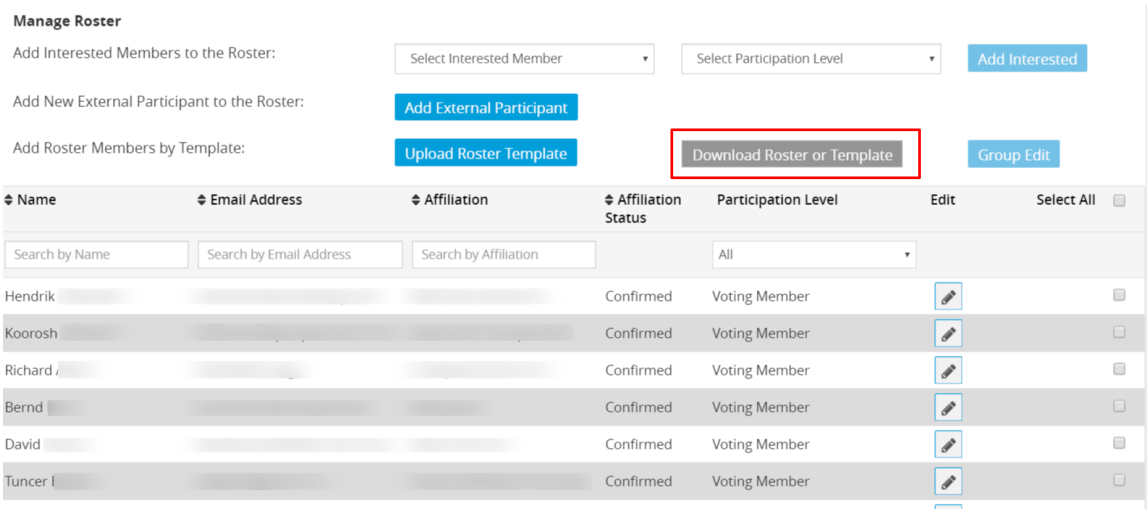
- Group Officers

Notes:

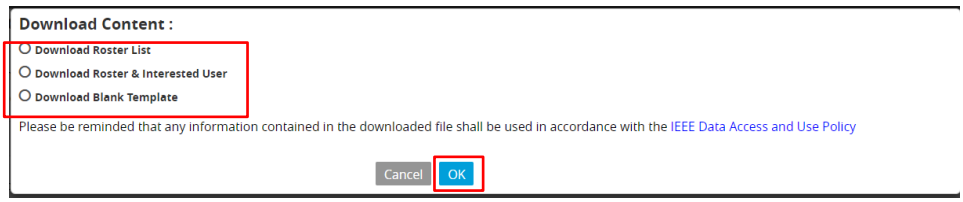
- Any information contained in the downloaded file shall be used in accordance with the IEEE Data Access and Use Policy.

Instructions for downloading roster:

1. From the myProject home screen, select **Menu**.
2. Click **Manage Groups**.
3. Use the **Search** field, **Filter By Type** or **Filter by Group Status** options to locate the appropriate group.
4. Click the **Manage Group Roster** icon.
5. Click on the **Roster** Tab.
6. Click on **Download Roster or Template**.

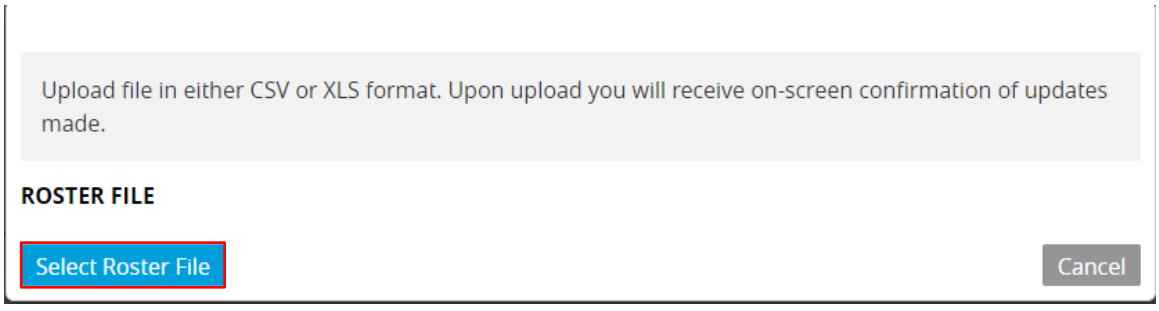


7. Choose **Excel** or **CSV** file type.
8. Choose **Download Roster List**, **Download Roster and Interested User** list or **Download Blank Template**.
9. Click **OK**.



Instructions for Uploading a Roster Template:

1. On the Roster tab, click **Upload Roster Template**
2. Click **Select Roster File**. Select the XLS or CSV file to be uploaded.
3. Click **Start Upload**. You will receive on-screen confirmation of updates made.



4.2.6 *Edit Group Details*

Applicable Users:

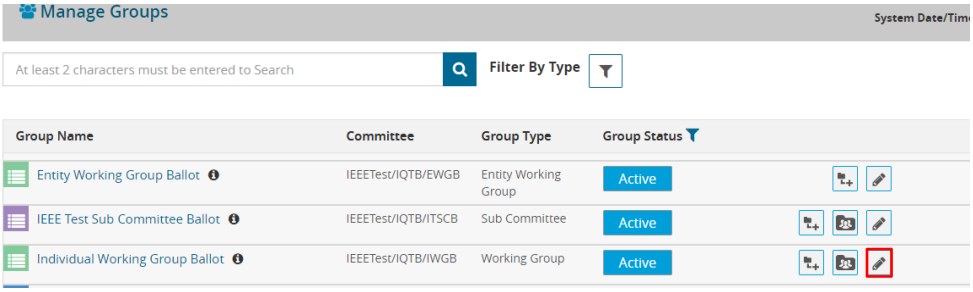
- Group Officers

Notes:

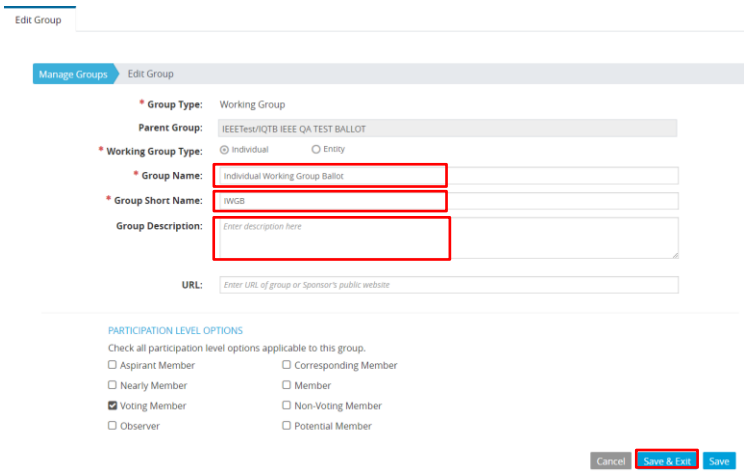
- Changes can be made to the name, short name, group description and participation level options of existing groups by using the **Edit Group Details** button.
- Parent Group can be modified at the working group level or lower.
- Working Group Type (individual/entity) can be modified by Governance staff only and can only be changed from entity to individual.

Instructions:

1. From the myProject home screen, select **Menu**.
2. Click **Manage Groups**.
3. Use the **Search** field, **Filter By Type** or **Filter by Group Status** options to locate the appropriate group.
4. Click on the **Edit Group Details** icon.



5. Make desired changes and click **Save and Exit**.



Notes:

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 and Mentor.

- The “Voting Member”, “Non-Voting Member” and “Observer” involvement levels may not be removed
- The “Interested” involvement level is not listed here, as it represents a user who has not been assigned an involvement level.

5 View/Manage Pars

In order to start work on a new standard, a PAR (Project Authorization Request) must be submitted. Work cannot start on a standard until the PAR is reviewed by NesCom (New Standards Committee) and approved by the Standards Board.

5.1 Submit a PAR for a New IEEE Standard

This is the process is for submitting a PAR for a completely new standard. The project can be worked on by an existing Working Group, or a new one can be requested. You must have approval of a Standards Committee committee, however, for your PAR to be considered.

Applicable Users:

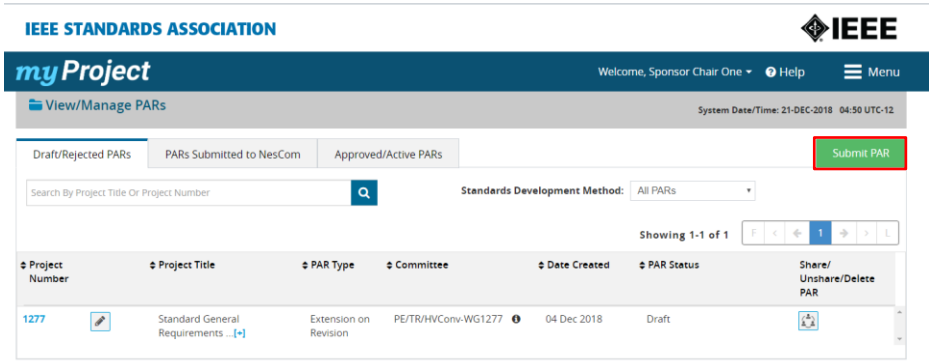
- IEEE SA Members

Notes:

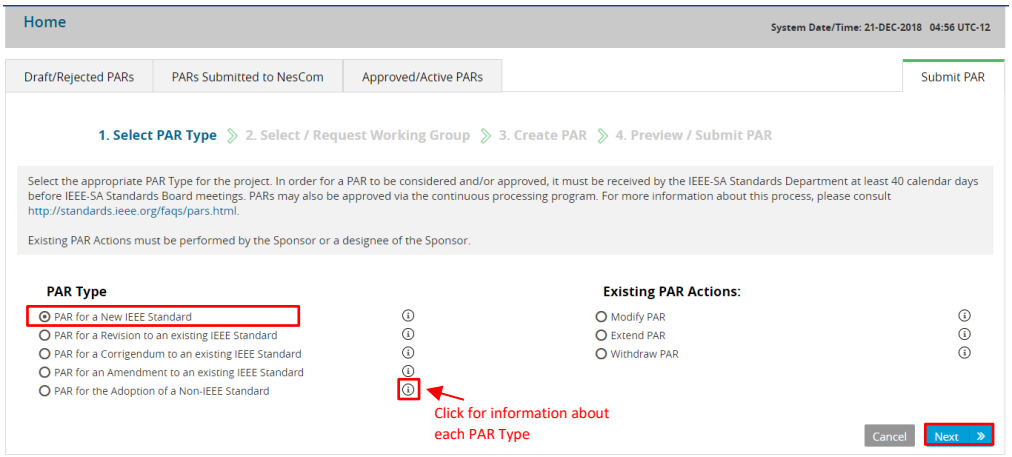
- The Standards Committee must have an approved P&P (policy and procedures) before it can submit a PAR.
- If the Standards Committee's P&P is expired, the P&P must be re-approved before submitting a PAR. (For more information on uploading Standards Committee P&Ps, see **Sec 8.1 Upload & Manage Standards Committee or Working Group P&Ps**.)

Instructions:

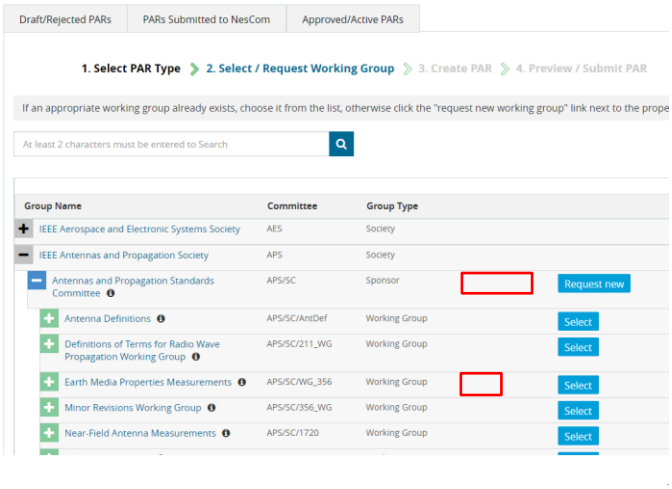
1. On the **myProject** Home Screen click **Menu**.
2. Click **View/Manage PARs**.
3. On the View/Manage PARs screen, click **Submit PAR.**



4. On the Submit PAR tab, click **PAR for a New IEEE Standard**. Click the information icon ⓘ for details about each type.
5. Click **Next**.



6. Locate the appropriate Standards Committee and Working Group by using the "**+**" to expand the Group Name list. (*This is the group that is responsible for supporting the work. By selecting the appropriate group, the Standards Committee Chair and Working Group Chair are notified of the PAR submittal. The Standards Committee Chair will need to accept the PAR in order for NesCom to approve it.*)

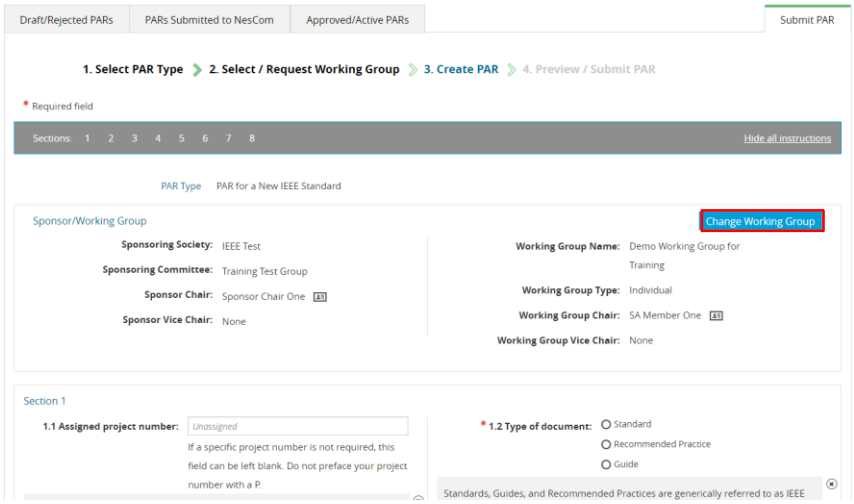


7. If the Working Group already exists, click **Select**.
8. Click **OK**.

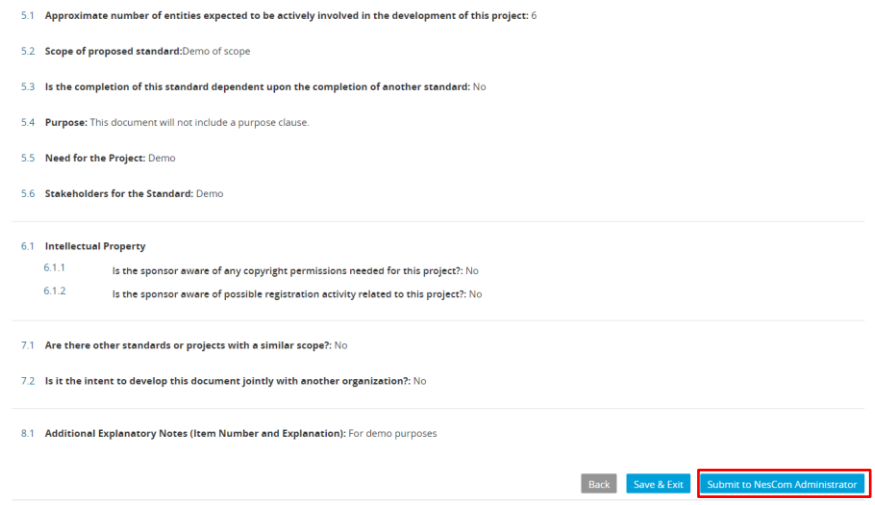
Notes:

- If you need to create a new group, click **Request New** and provide the requested information.
- If the PAR is for a new working group that you need to create, the Standards Committee chair will be notified of the new group and will need to approve it and assign a working group chair.

9. Complete the PAR form. Each section contains instructions for specific fields. The Working Group can be changed using the **Change Working Group** button.



10. When complete, click the check box to acknowledge and accept the IEEE Code of Ethics.
11. Click **Preview and Submit**. **NOTE**: Other options include **Delete Draft PAR** or **Save and Exit** that will allow you to complete the PAR at a later date. **(see sec 5.2 Saving, Editing, Sharing and Deleting a Draft PAR)**.
12. Review the PAR and click **Submit to NesCom Administrator**.



13. The PAR will now be added to the next NesCom agenda and notifications will be sent to the Working Group Chair, Standards Committee Chair, Program Manager, and NesCom Administrator)
    - **NOTE**: Once you approve and submit the information, changes may only be made through the NesCom Administrator.

5.2 *Saving, Editing, Sharing and Deleting a Draft PAR*

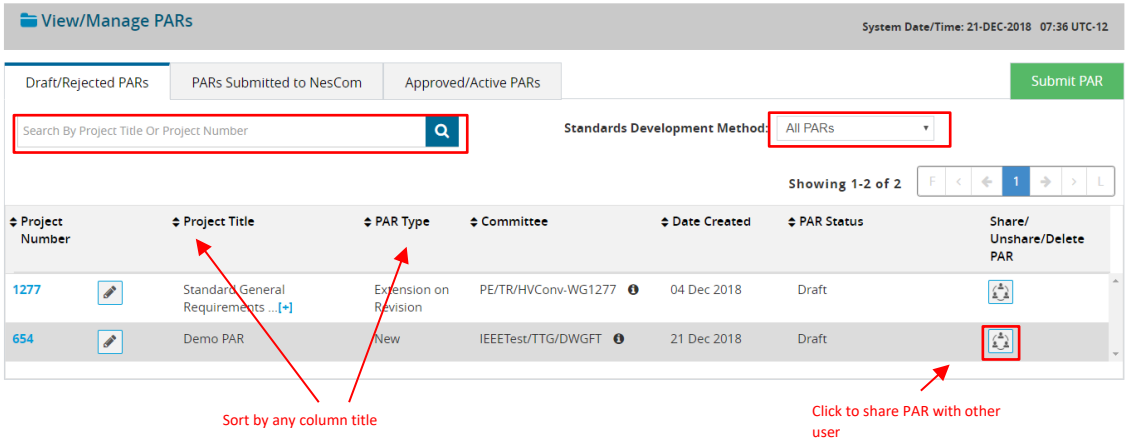
All PAR forms save automatically while you are working on them for the first time. When editing, you can save a draft PAR at any time and return to it later, share it, or delete it.

Applicable Users:

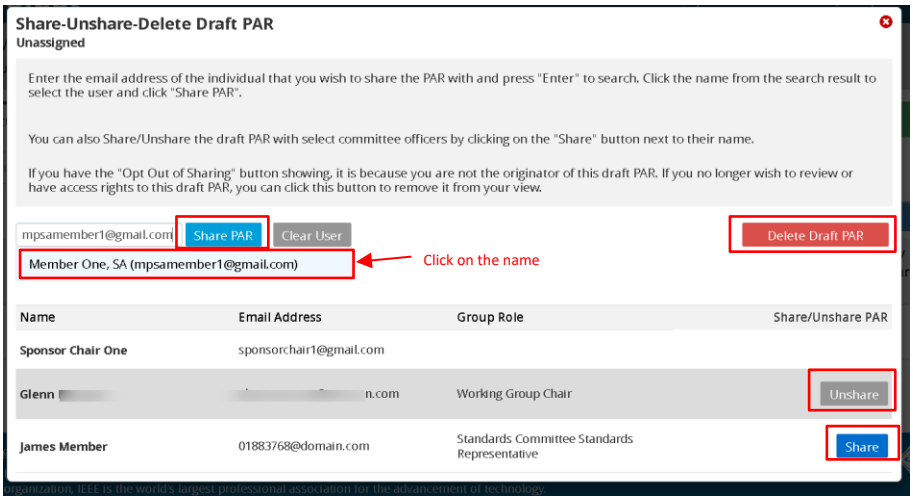
- IEEE SA Members

Instructions:

- Click **Save & Exit** on any PAR form.
- When you are ready to resume, go to the myProject Home page and select **Menu**.
- Click **View/Manage PARs**.
- Locate the PAR using the search bar or using the Standards Development Method drop down or by sorting each column.
- Click the **Edit** icon. The PAR will appear.



- To share the PAR with another user, click the **Share** icon**.** (*This person will have the ability to view, edit and submit and the PAR*.)



- Enter the email address of the person with whom you would like to share the PAR. The system will verify the address. (*The email address must be associated with an IEEE Account*)
- Click on the **user's name**.
- Click **Share PAR**. The individual's name will be added to the list.
    - For your convenience, Working Group and Standards Committee chairs will already be listed. Click **Share** next to the individual's name/email to share the draft PAR with them.
- Click the **Delete Draft PAR** button to delete the PAR.
    - If you are not the PAR creator, you will not be able to delete the draft. Click **Opt Out of Sharing** to remove the draft PAR from your view.
- To unshare the PAR with an individual click the **Unshare** button in the row next to the person's name.

5.3 Submit a PAR for a Revision, Corrigendum, or Amendment to an Existing IEEE Standard

These forms are similar to PARs for a new standard but are for PARs that change existing IEEE standards. Revisions are documents that replace the current standard, corrigendas add technical corrections, and amendments are other additions or corrections to the standard.

5.3.1 *Submitting a PAR for a Revision to an existing IEEE Standard:*

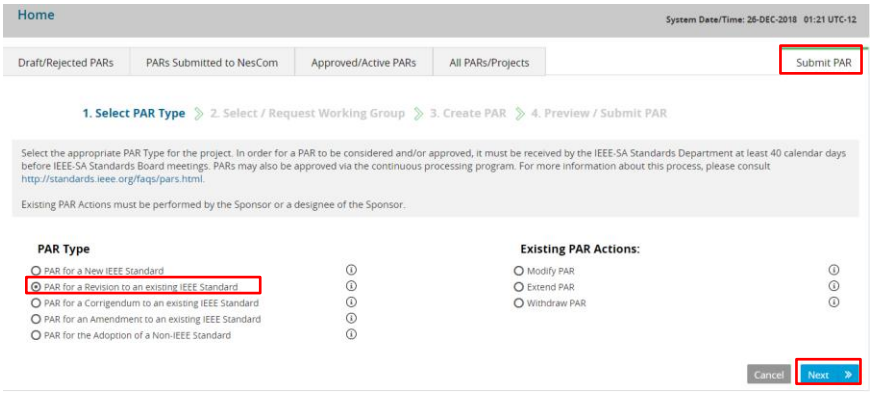
Applicable Users:

- IEEE SA Members

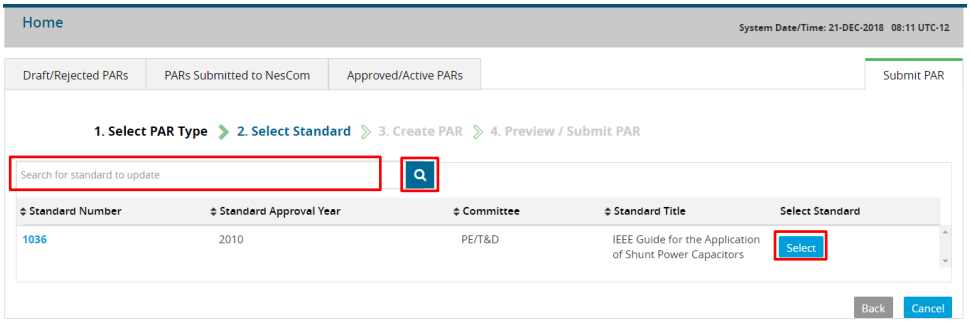
Instructions:

1. On the **myProject** Home Screen click **Menu**.
2. Click **View/Manage PARs.**
3. Click **Submit Par**.

4. Click on the **Par for a Revision to an existing IEEE Standard**.
5. Click **Next**.



6. Enter the standard number in the search box and click the Search icon.
7. Click **Select** next to the standard you want to revise.

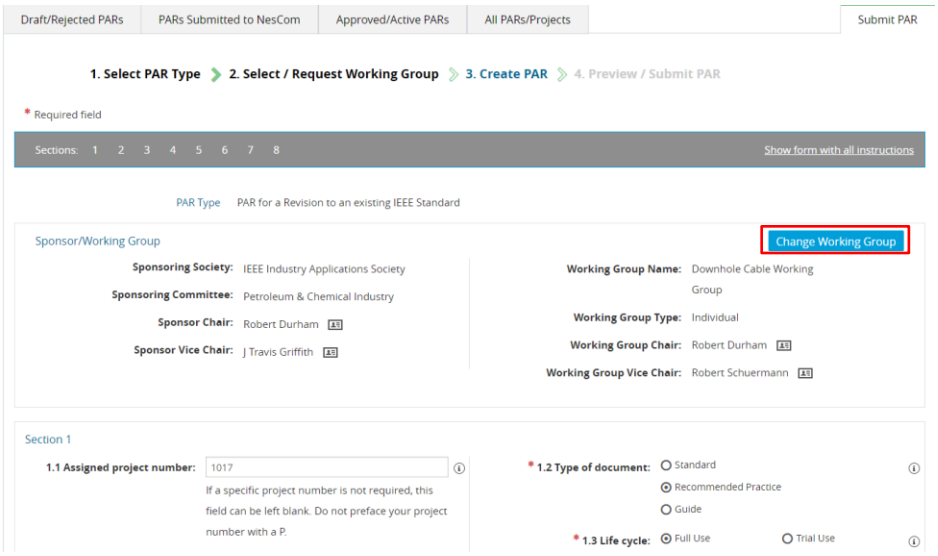


8. Make desired changes to the PAR and be sure to fill in any required fields indicated with a red asterisk *. If you want to change the working group, click **Change Working Group**.

Notes:

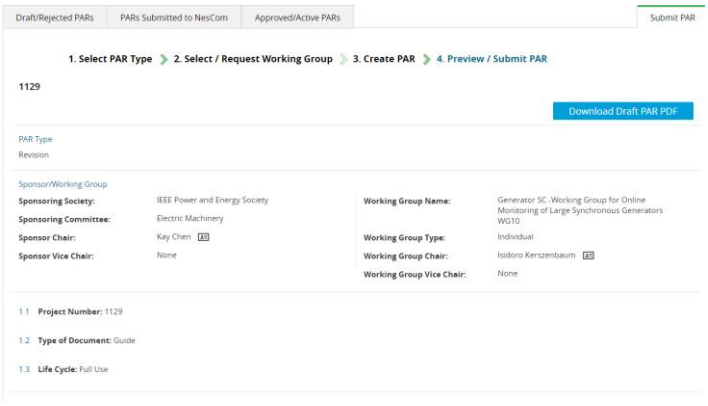
- If you need to create a new group, click **Request New** and provide the requested information.
- If you create a new working group, the Standards Committee chair will be notified of the new group and will need to approve it and assign a working group chair.
- You will only be able to select Working Groups under the Standards Committee associated with the root standard. If there is a change in Standards Committee, please contact your assigned Program Manager.

9. Click **Save and Exit** to complete later **OR** click **Preview and Submit.**



10. On the Preview /Submit PAR screen, review all revisions.
11. Click **Submit to NesCom Administrator.**
12. Click **OK.** The PAR will now be added to the next NesCom agenda and notifications will be sent to the Working Group Chair, Standards Committee Chair, Program Manager, and NesCom Administrator)

    - **NOTE**: Once you approve and submit the information, changes may only be made through the NesCom Administrator.



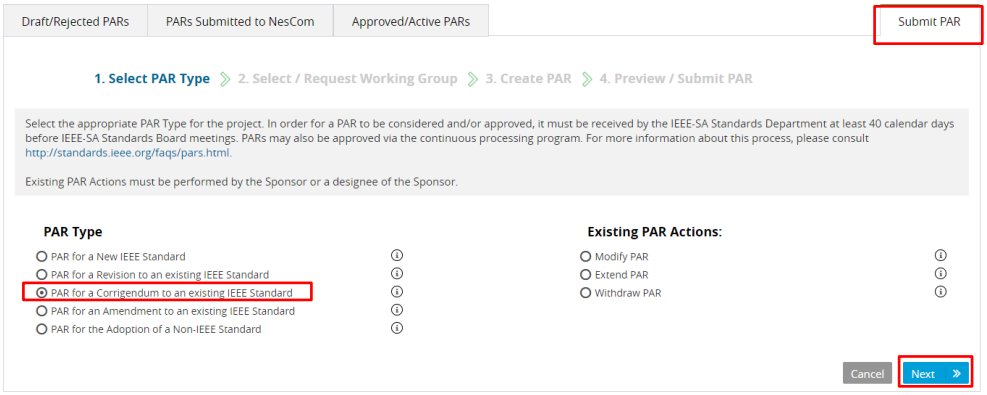
5.3.2 *Submitting a PAR for a Corrigendum to an existing IEEE Standard:*

Applicable Users:

- IEEE SA Members

Instructions:

1. On the **myProject** Home Screen click **Menu**.
2. Click **View/Manage PARs.**
3. Click **Submit Par**.
4. Click **PAR for a Corrigendum to an existing IEEE Standard**
5. Click **Next**.



6. Follow steps **6-12 under section 5.3.1** to complete the PAR.

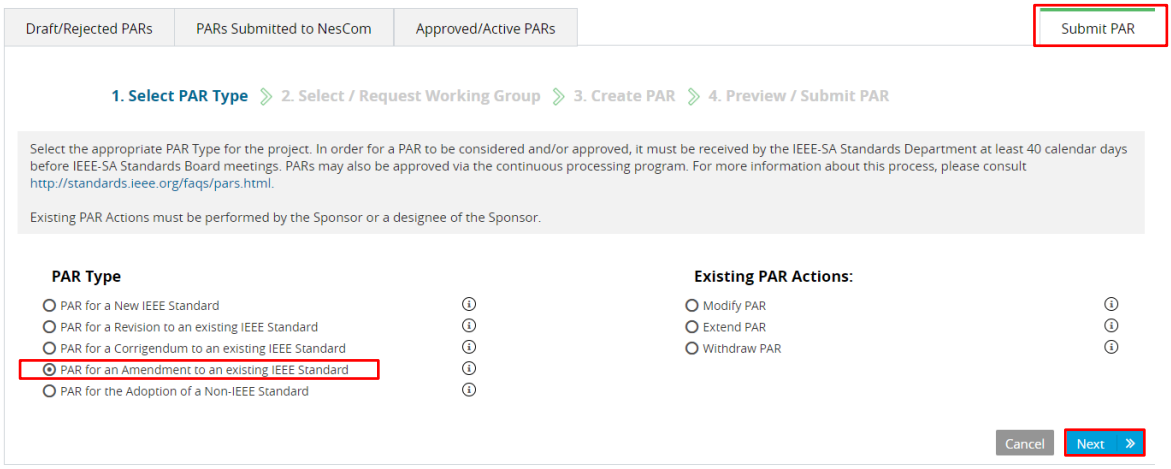
5.3.3 *Submitting a PAR for an Amendment to an existing IEEE Standard:*

Applicable Users:

- IEEE SA Members

Instructions:

1. On the **myProject** Home Screen click **Menu**.
2. Click **View/Manage PARs.**
3. Click **Submit Par**.
4. Click **PAR for an Amendment to an existing IEEE Standard.**
5. Click **Next.**



6. Follow step **6-12 under section 5.3.1** to complete the PAR.

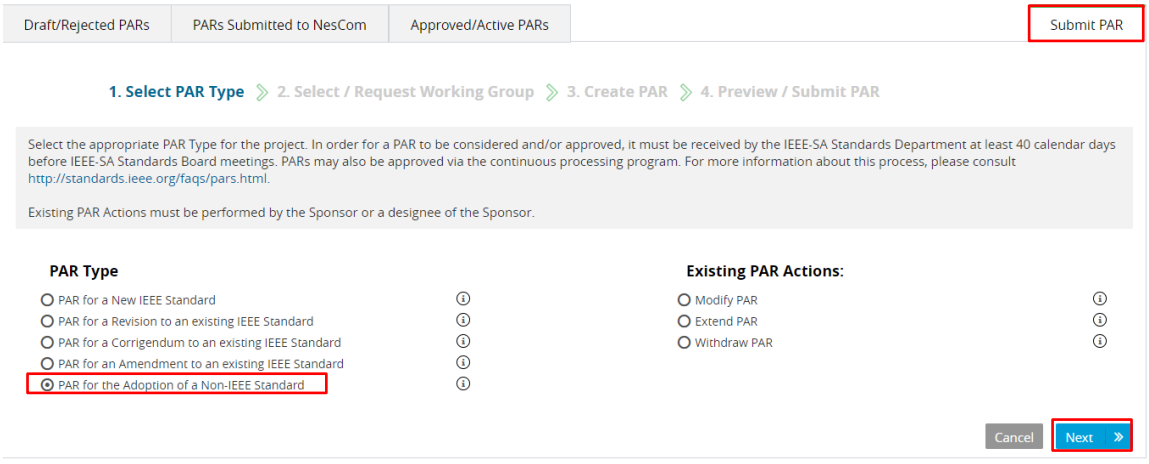
5.3.4 *Submitting a PAR for the Adoption of a Non-IEEE Standard*

Applicable Users:

- IEEE SA Members

Instructions:

1. On the **myProject** Home Screen click **Menu**.
2. Click **View/Manage PARs.**
3. Click **Submit Par**.
4. Click **PAR for the Adoption of a Non-IEEE Standard**.
5. Click **Next**.



6. Follow steps in **5.1 Submit a PAR for a New IEEE Standard** to complete the PAR.

5.4 Modify an Approved PAR

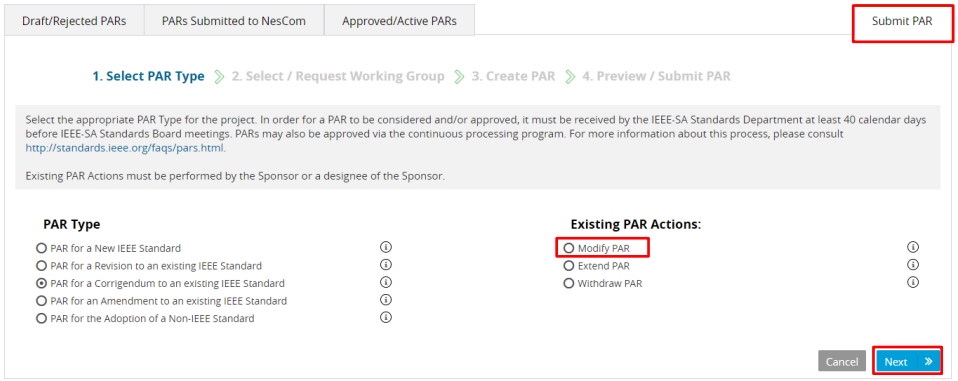
If the scope, purpose, or other elements of the draft standard change in any way, the PAR must be modified and approved.

Applicable Users:

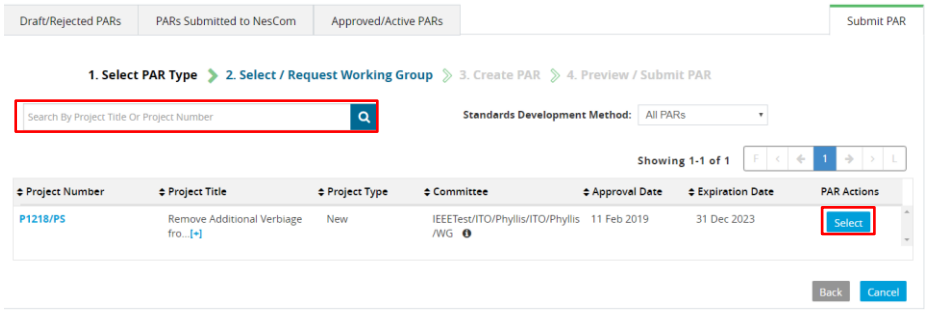
- Working Group or Standards Committee officers

Instructions:

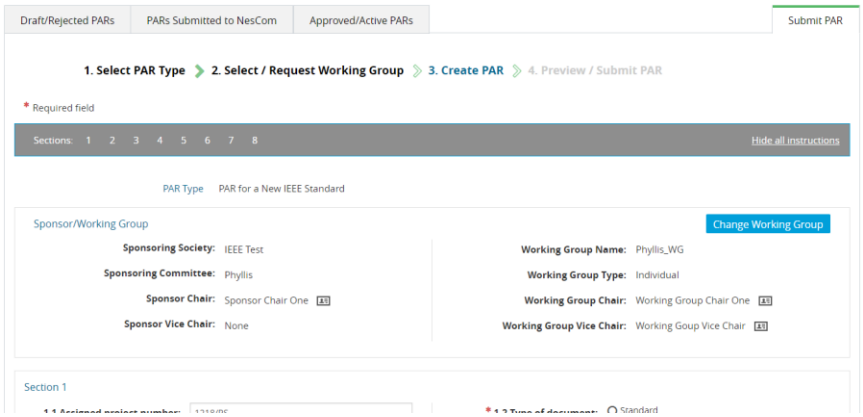
1. On the **myProject** Home Screen click **Menu**.
2. Click **View/Manage PARs.**
3. Click **Submit Par**.



4. A list of all active PARs associated with groups you manage will be displayed. Enter the PAR number in the box and click the **search** icon.
5. Click **Select** next to the PAR you want to modify.

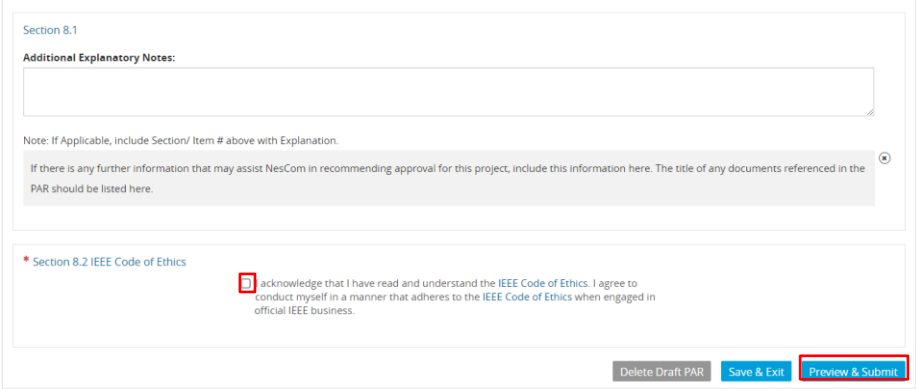


6. Make required changes to the PAR and fill in any required fields indicated by a red asterisk *.



7. Click to agree to the **IEEE Code of Ethics**.

8. Click **Preview and Submit**.



9. Review the PAR and click Submit to NesCom Administrator. The PAR will now be added to the next NesCom agenda and notifications will be sent to the Working Group Chair, Standards Committee Chair, Program Manager, and NesCom Administrator)

NOTE: Once you approve and submit the information, changes may only be made through the NesCom Administrator.

5.5 *Extend an Existing PAR*

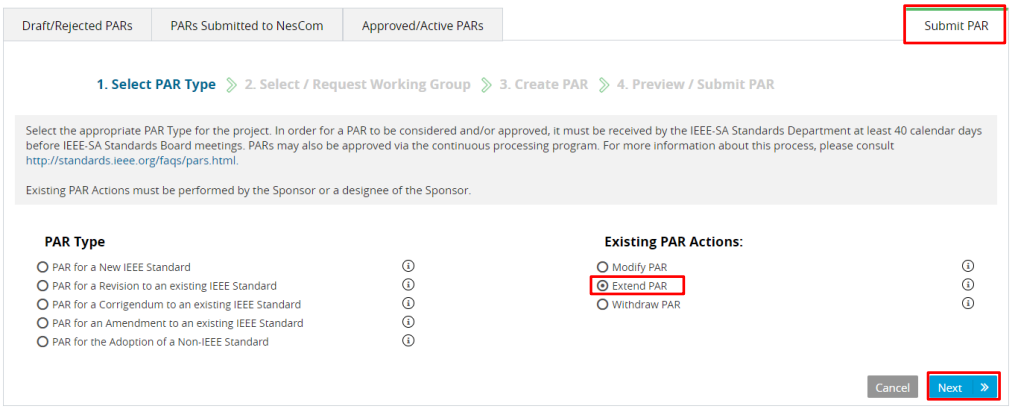
PARs are only valid for 4 years. If the working group needs more time to draft the standard, an extension must be filed and approved by NesCom before the PAR expires.

Applicable Users:

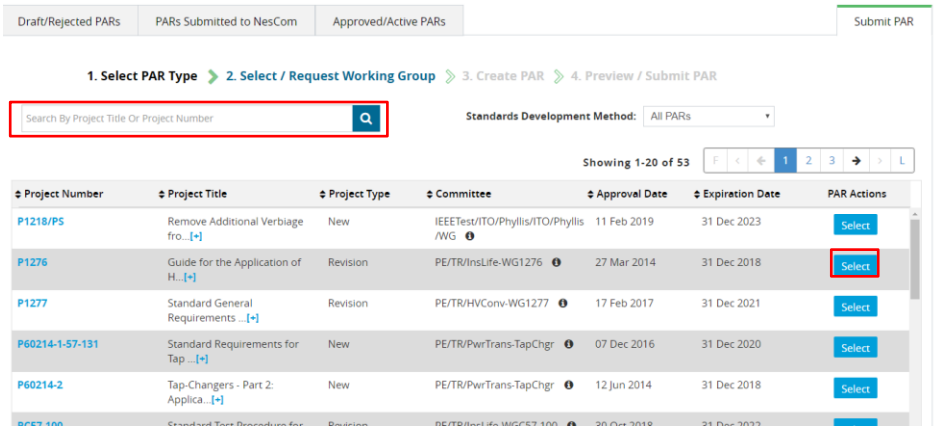
- Working Group or Standards Committee officers

Instructions:

1. On the **myProject** Home Screen click **Menu**.
2. Click **View/Manage PARs.**
3. Click **Submit Par**.
4. Under Existing PAR Actions, click **Extend PAR**.
5. Click **Next**.

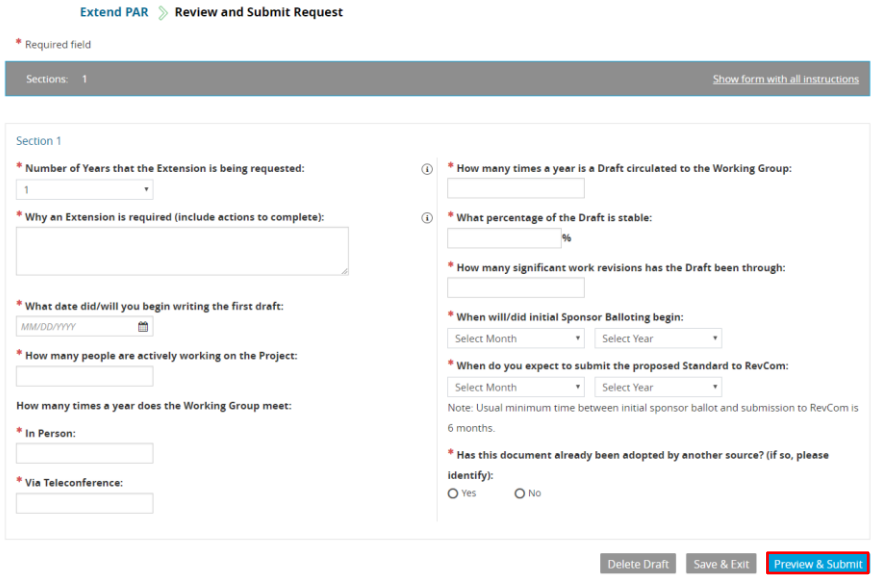


6. A list of all active PARs associated with groups you manage will be displayed. Enter the PAR number in the box and click the **search** icon.
7. Click **Select** next to the PAR you want to extend. The Extend PAR, Review and Submit Request screen will appear.



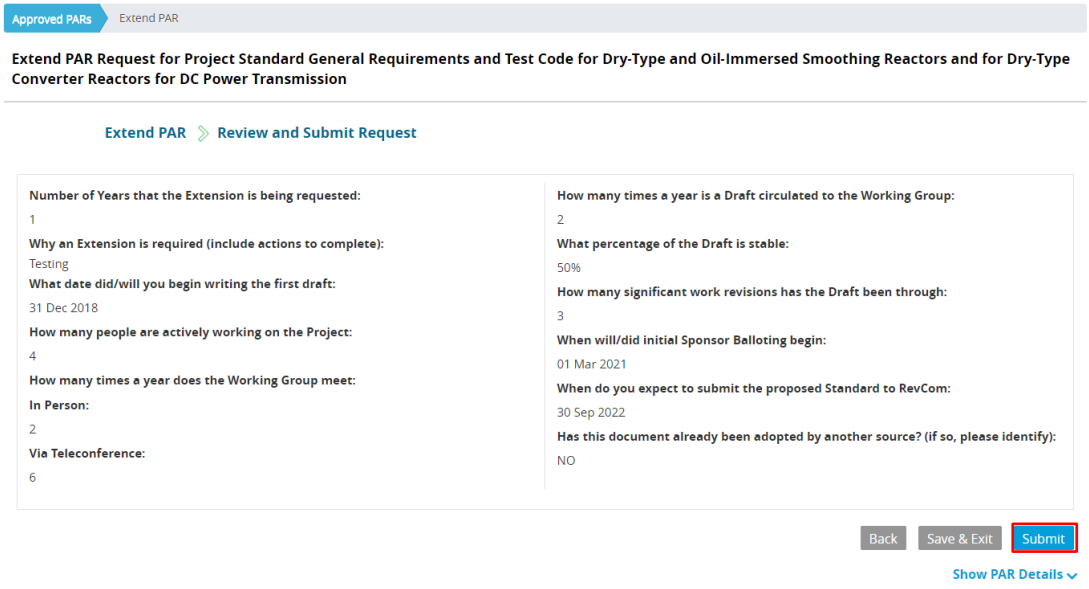
8. Fill in the required fields indicated with a red asterisk*.

9. Choose **Delete Draft** to discard the extension request, **Save and Exit** to save the extension request and return to it later, or **Preview and Submit**.



12. Review the information and click **Submit**. The PAR will now be added to the next NesCom agenda and notifications will be sent to the Working Group Chair, Standards Committee Chair, Program Manager, and NesCom Administrator).

NOTE: Once you approve and submit the information, changes may only be made through the NesCom Administrator



5.6 Withdraw an Approved PAR

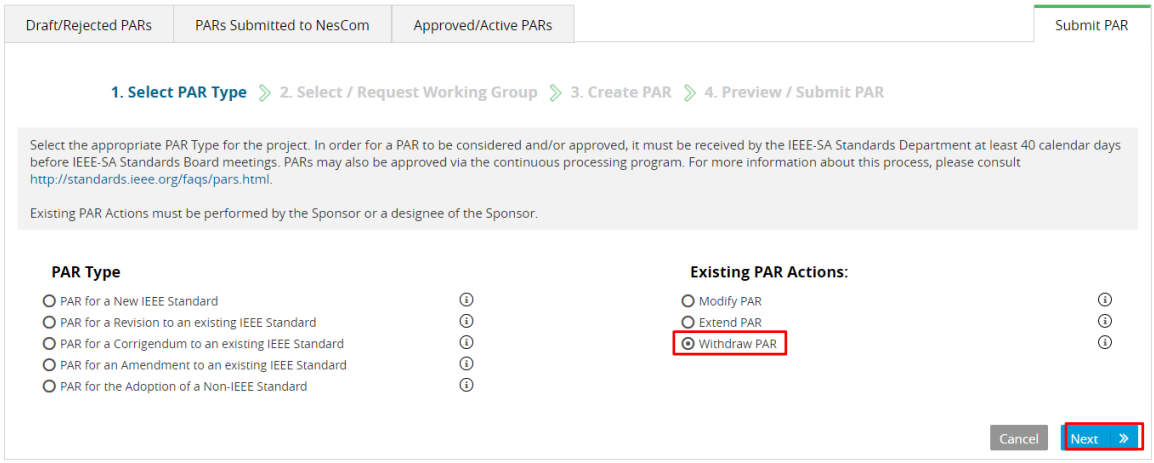
This option is used if, for any reason, the working group decides to discontinue work on a project.

Applicable Users:

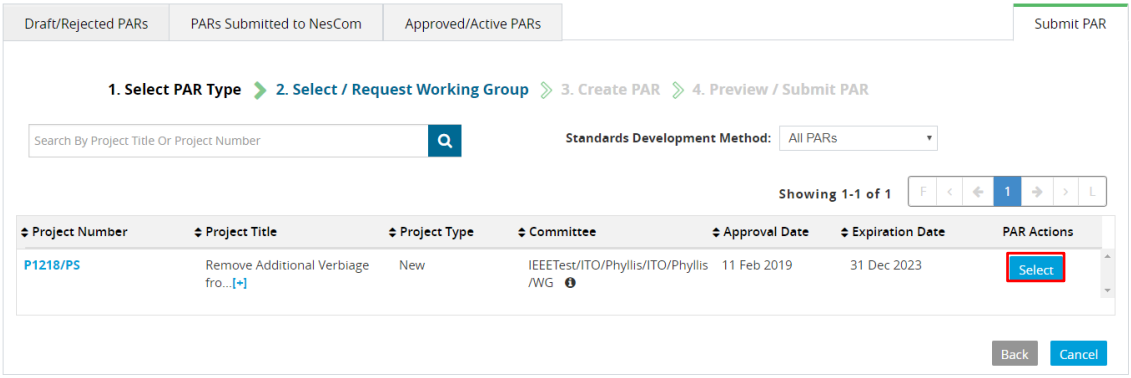
- Working Group or Standards Committee officers

Instructions:

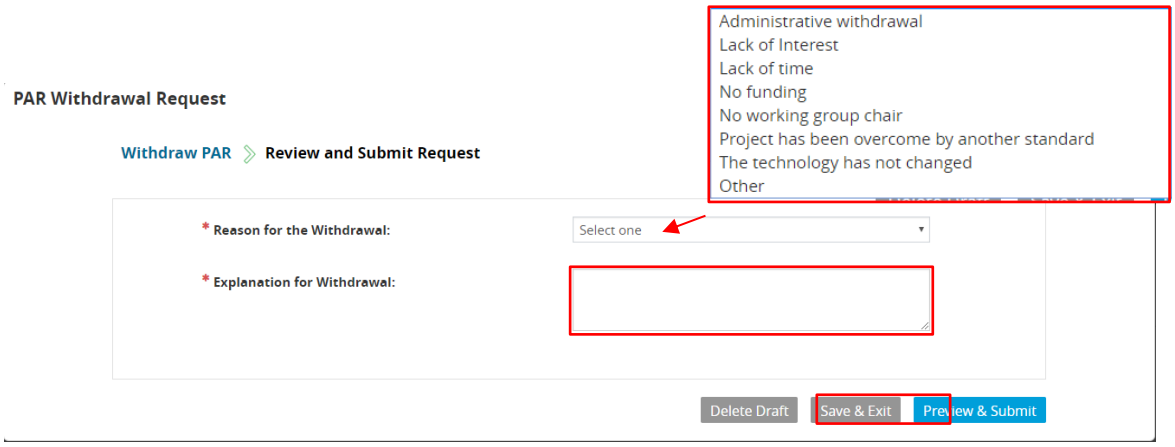
1. On the **myProject** Home Screen click **Menu**.
2. Click **View/Manage PARs.**
3. Click **Submit Par**.
4. Under Existing PAR Actions, click **Extend PAR**.
5. Click **Next**.



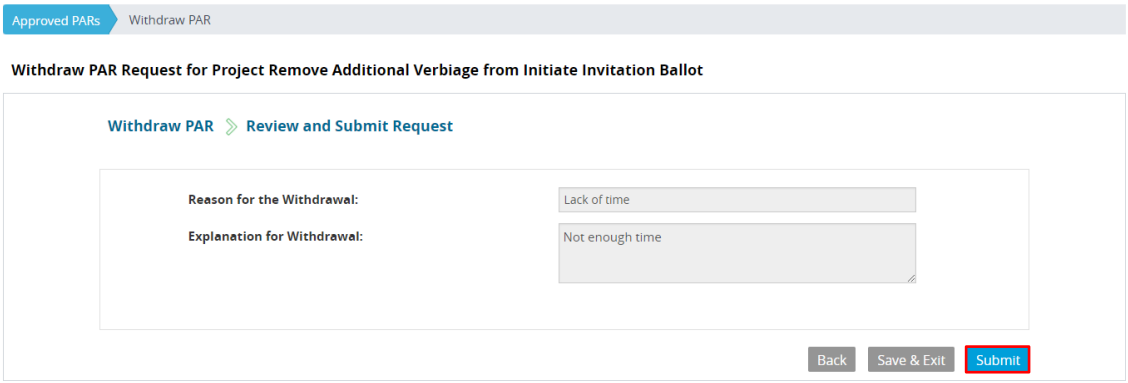
6. A list of all active PARs associated with groups you manage will be displayed. Enter the PAR number in the box and click the **search** icon.
7. Click **Select.**



8. From the **Reason for the Withdrawa**l drop down, choose a reason you are withdrawing the PAR
9. Type an explanation for the withdrawal in the **Explanation for Withdrawal** box.
10. Click **Preview & Submit**.



11. Review the Withdrawal request and click **Submit**. The PAR withdrawal will now be added to the next NesCom agenda and notifications will be sent to the Working Group Chair, Standards Committee Chair, Program Manager, and NesCom Administrator.



5.7 Accept or Reject a PAR

After a PAR is submitted, it will tentatively be placed on the agenda for the next NesCom meeting. The PAR must be accepted, however, by the Standards Committee Chair or Standard representative before the NesCom meeting. In the case of Joint sponsorship, the primary Standards Committee must accept the PAR. The Co-Standards Committee, however, will receive all notifications and have access to NesCom comments and related dialogue.

Applicable Users:

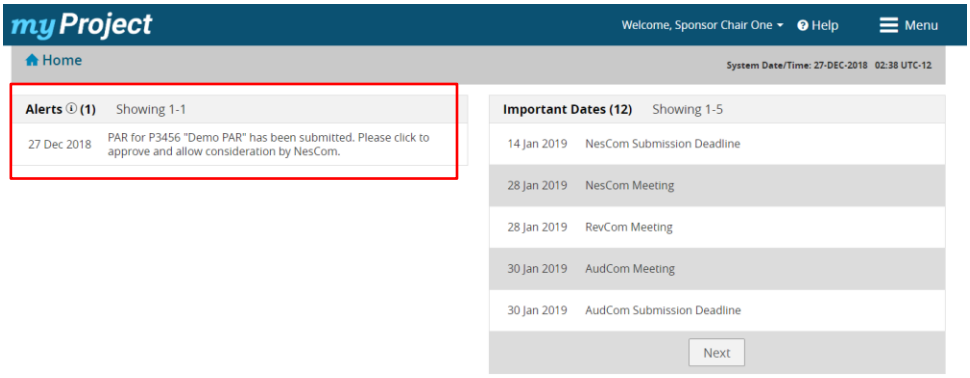
- Standards Committee Chair, Standards Representative

Notes:

- The PAR will not be put onto the final NesCom agenda without Standards Committee approval. If the Standards Committee fails to approve the PAR, it will move to the following NesCom meeting agenda.
- If you require changes to the PAR before accepting, please contact the NesCom Administrator to make those changes. Rejecting the PAR may delay approval.
- Standards Committee chairs will receive an email and get an alert in the system to let them know that a PAR has been submitted for approval.
    - You can also see pending PARs by accessing the **myProject menu** and choosing **View Manage PARS** and clicking on the **PARS Submitted to NesCom tab** OR choosing **AudCom/NesCom/RevCom** and viewing the **My NesCom Submissions tab** and clicking on **Submissions Details.**

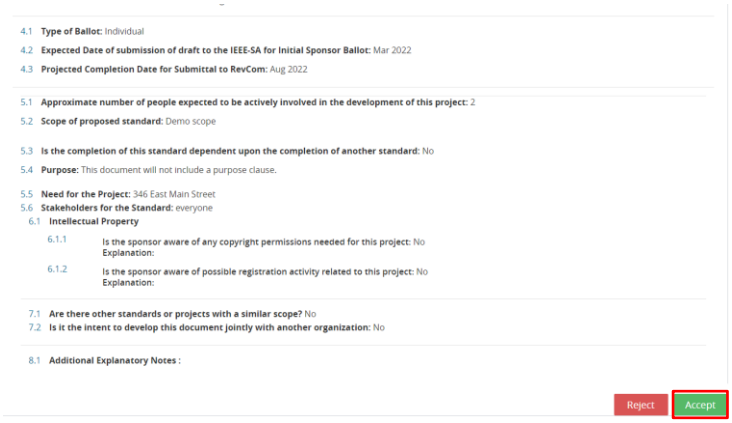
Instructions:

1. On the **myProject** Home page, click on the Alert indicating a PAR is waiting for your approval or access it via the other options listed above.

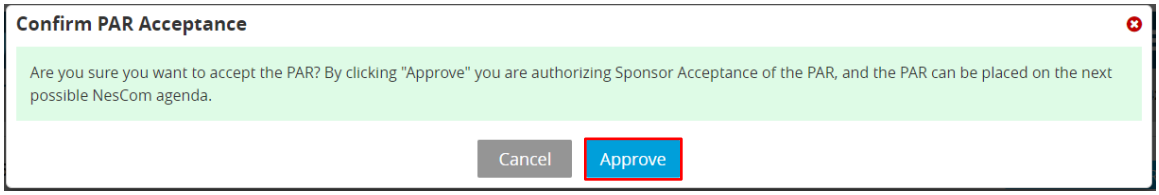


2. Review the PAR.

3. Click **Reject** or **Accept**.

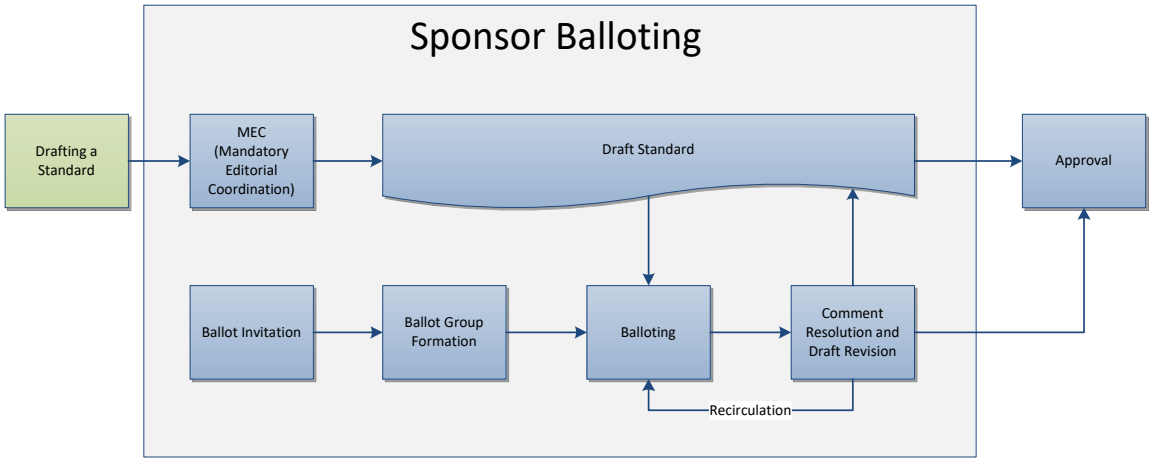


4. Click **Approve**. By accepting the PAR it can be placed on the next possible NesCom agenda.



6 Invitations/Ballots

Once a draft document is stable, it is ready for balloting. A ballot invitation must be initiated, a ballot group formed and a ballot initiated. The draft must receive a consensus approval or be recirculated until one is obtained.



6.1 Submit a Draft for MEC

Mandatory Editorial Coordination (MEC) is required prior to the start of a Standards Committee Ballot. MEC ensures conformance with all IEEE requirements. Review of your draft and permission letters will reduce the number of recirculations and help to avoid delays in approval or possible rejection by RevCom.

Applicable Users:

- Standards Committee Chair, Standard Representative, Working Group Chair/Co-Chair/Vice-Chair, Standards Committee Ballot Designee

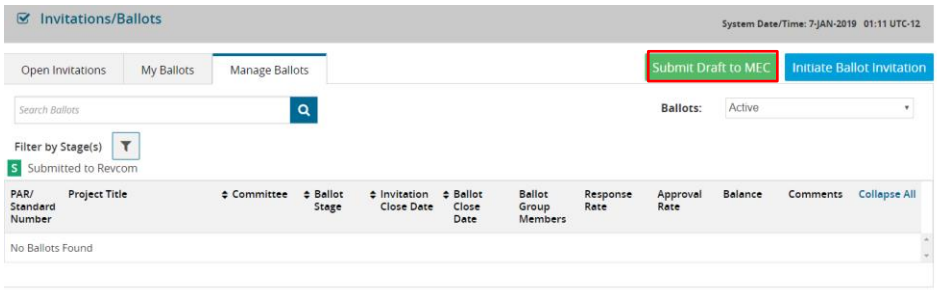
Notes:

- The Mandatory Editorial Coordination (MEC) should be initiated by the start of the ballot invitation.
- Be sure to include all copyright permissions letters at this time.

Instructions:

1. On the **myProject** Home Screen click **Menu**.
2. Click **Invitations and Ballots**.

3. Click **Submit Draft to MEC.**



4. You will be directed out of myProject to the MEC form
5. Follow the instructions to complete the form displayed, making sure to fill out all relevant fields and upload your draft. Make sure to select the correct Program Manager. Program Managers are listed when clicking on the **i** button next to the group in the **Manage Groups** screen**.**

6.2 Initiate Ballot Invitation

The first step in Standards Committee balloting is forming the ballot group. In order to form this group, a ballot invitation must be initiated. All users who have expressed interest in the project through myProject will be notified of the ballot group formation. During the invitation period, typically 30 days, individuals (or entity representatives) can join the balloting group, change their voter classification, or withdraw from the ballot. Working Group officers should monitor the group for balance during this period.

Applicable Users:

- Standards Committee Chair, Standard Representative, Working Group Chair/Co-Chair/Vice-Chair

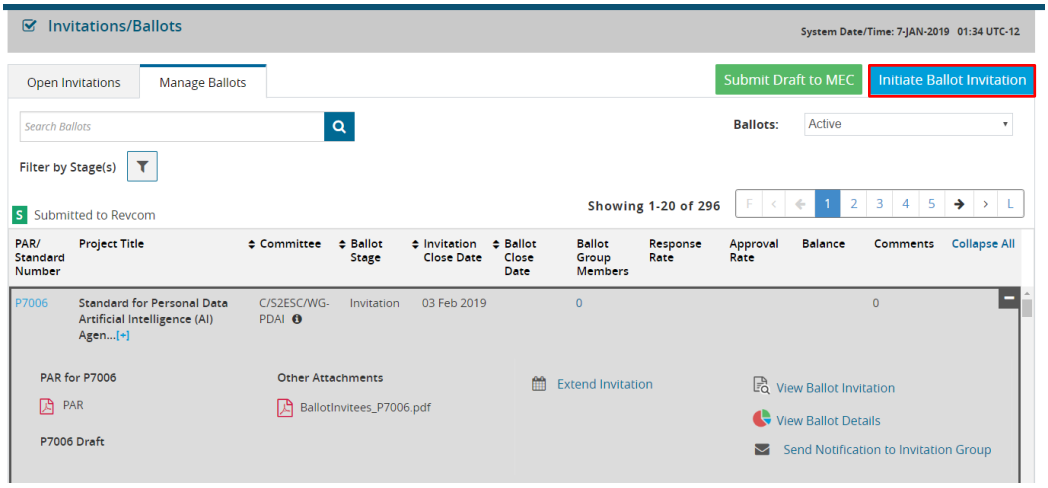
Notes:

- The MEC should be initiated before the ballot invitation is sent out. For more information on submitting a draft for MEC, see **Sec 6.1 Submit a Draft for MEC**.
- The invitation will not open until your program manager reviews and sends the invitation.
- The Standards Committee Chair/Standards Representative will be notified of the invitation, but are not required to mark approval.
- Standards Committee balloting must begin within six months of the invitation. If Standards Committee balloting does not begin within six months, the ballot group must be re-formed.

Instructions:

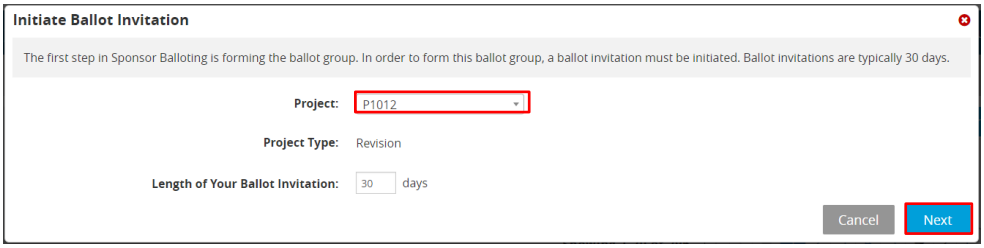
1. On the **myProject** Home Screen click the **Menu**.
2. Click **Invitations and Ballots**.

3. Click **Initiate Ballot Invitation**.



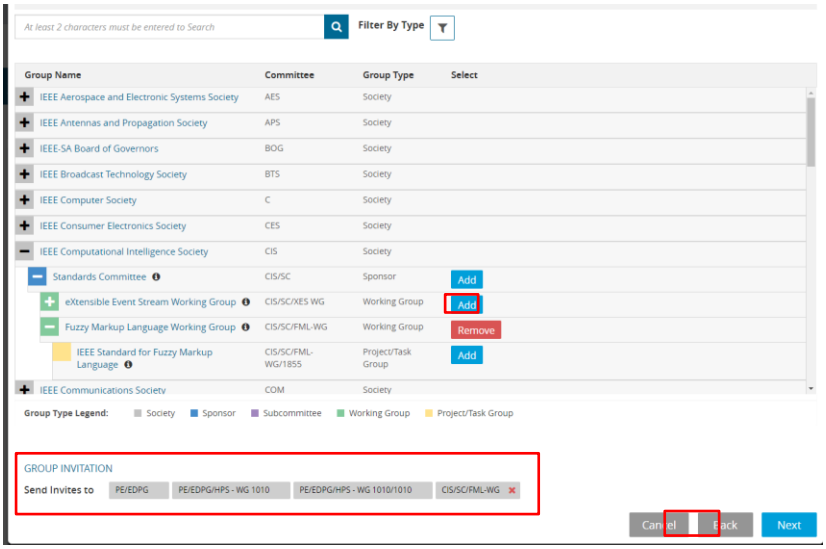
4. In the **Initiate Ballot Invitation** box, select your project from the **Project** drop-down. The Project Type field will automatically populate. The Length of Your Ballot Invitation defaults to 30 days.

5. Click **Next**.



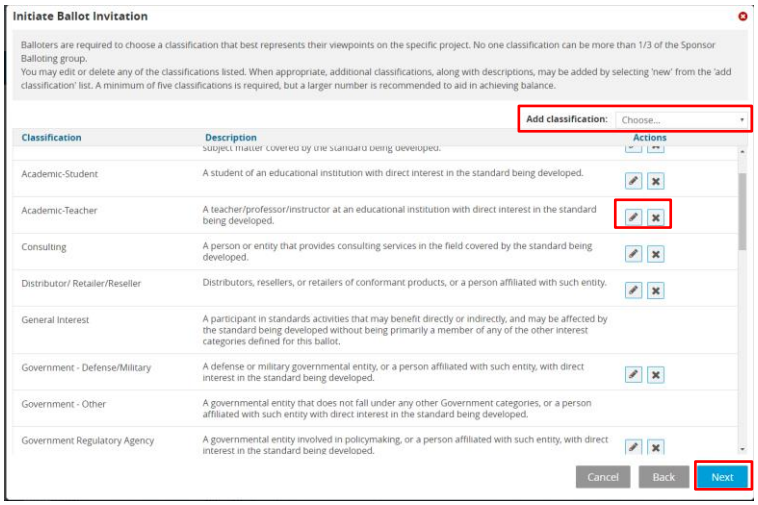
6. Use the Search bar or "+" sign to navigate to the committees, working groups, or project/task groups you want to invite into the Balloting group and click **Add**. Pre-selected groups are automatically added and will display in the Group Invitation area at the bottom of the screen.

7. Click **Next**.

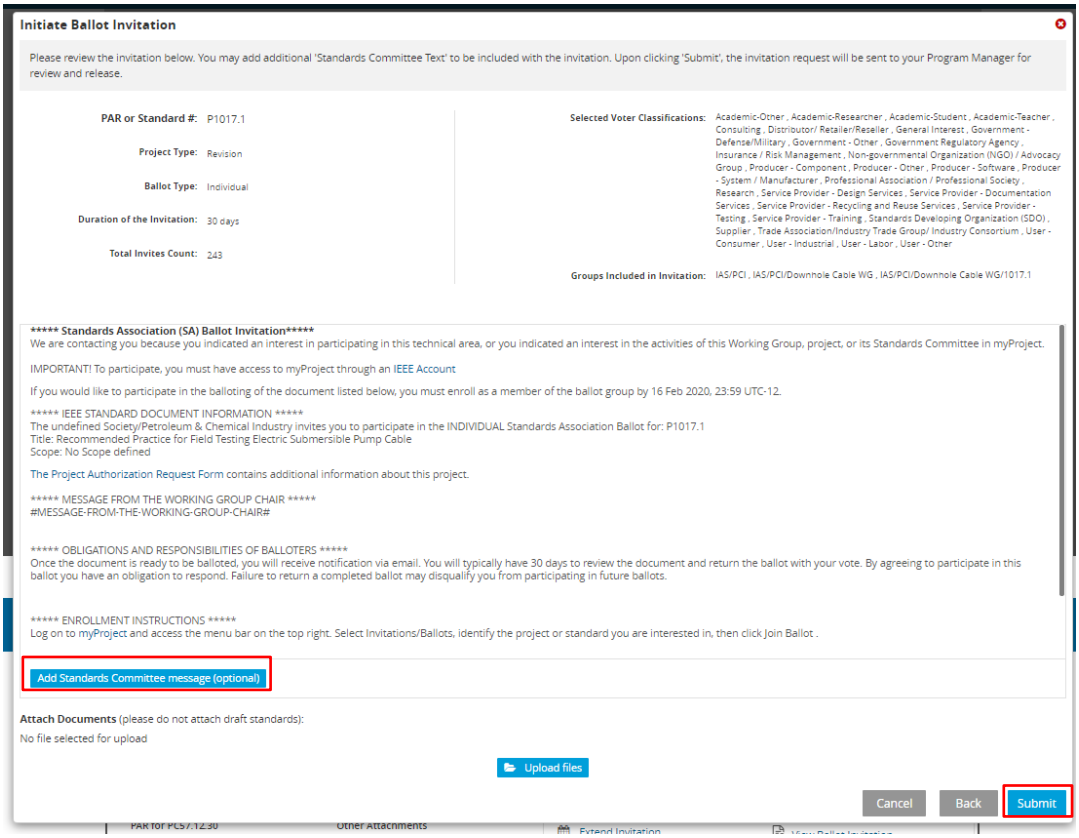


8. Confirm the voter classifications for the ballot.
   - Verify that at least 3 voter classifications are displayed.
   - To add another voter classification, click **Add Classifications**.
   - To edit a voter classification, click the **Edit** icon next to the classification
   - To remove a voter classification, click "**delete**" next to the classification. (This is not recommended).

9. Click **Next**.



10. Verify the Invitation information.
    - Review the invitation. Use the **Back** button to make changes.
    - For most ballots, do not include an attachment.
    - Additional information can be added in the **Standards Committee Message** area. This text will be displayed in place of the #MESSAGE-FROM-THE-WORKING-GROUP-CHAIR# placeholder text.
    - Do not attach published standards or drafts, necessary documents will be made available in myProject once the ballot has opened.
11. Click **Submit**. The invitation will be submitted to your program manager for approval.



6.3 Review Ballot Invitations

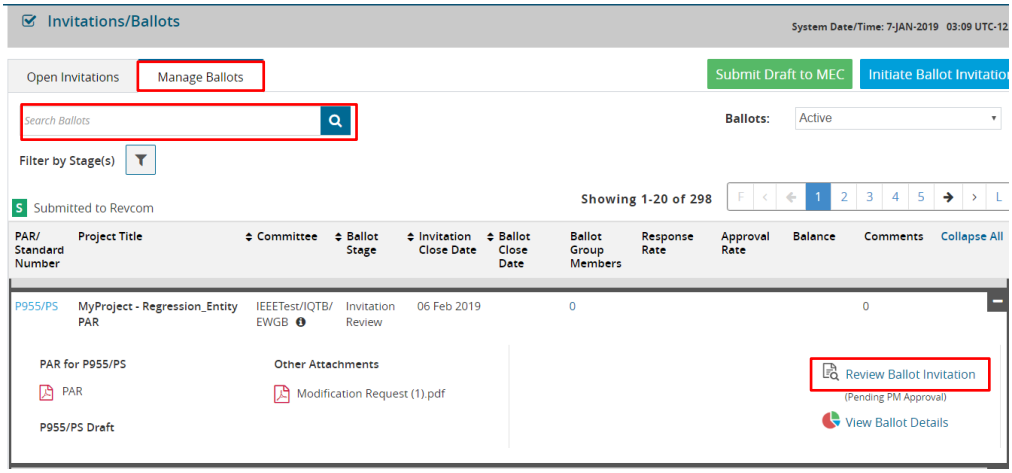
When an officer initiates a ballot invitation, the invitation does not automatically open. The program manager must first review and send the invitation to move the ballot from the "Pre-Invite" stage to the "Invitation" stage.

Applicable Users:

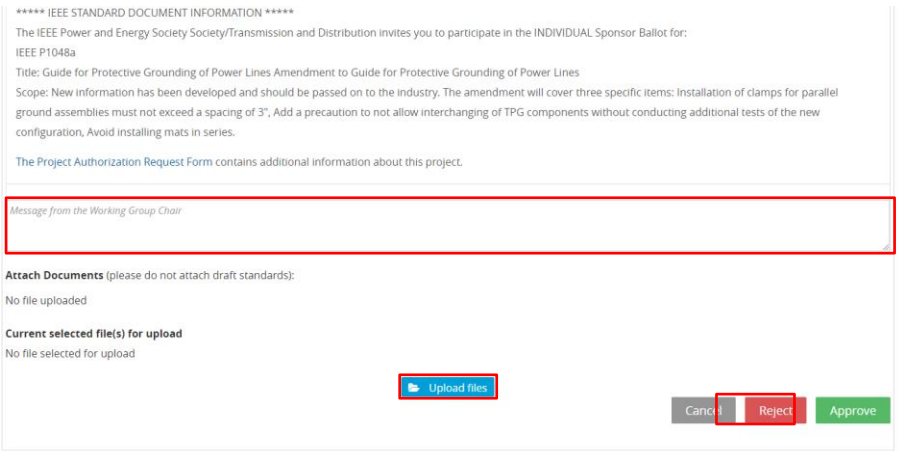
- Program manager

Instructions:

1. On the **myProject** Home Screen, click **Menu**.
2. Click **Invitations/Ballots**. The Manage Ballots tab will appear.
3. Use the **Search** box or **Filter by Stage** tool to locate the ballot invitation you want to review.
4. Click **Review Ballot Invitation**.



5. Review the ballot invitation.
    - To edit any of the invitation information, click **Edit icon** next to the fields you want to edit.
    - Add **text** to the invitation by typing it in the Message from the Working Group Chair box.
    - Click **Upload Files** to add files to the invitation.
    - Click **Approve**. The invitation will be released to the ballot group.



6.4 Reopen/Extend Ballot Invitation

This option is for extending a ballot invitation to allow potential balloters more time to join the ballot group or change their voter classification.

Applicable Users:

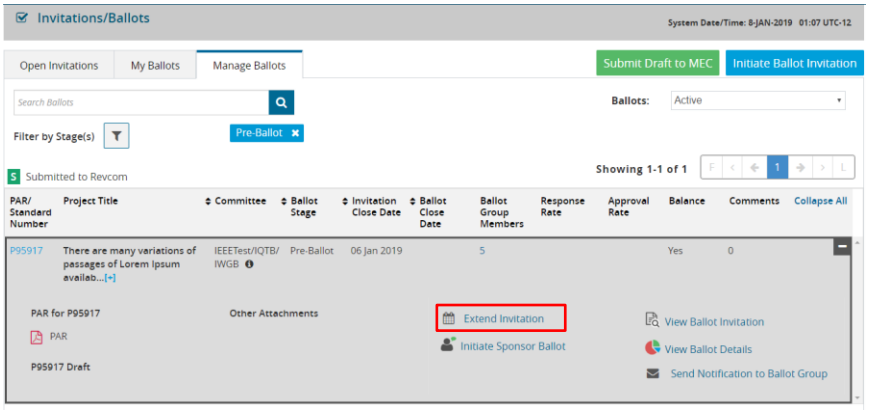
- Standards Committee Chair, Standard Representative, Working Group Chair/Co-Chair/Vice-Chair, Standards Committee Ballot Designee

Notes:

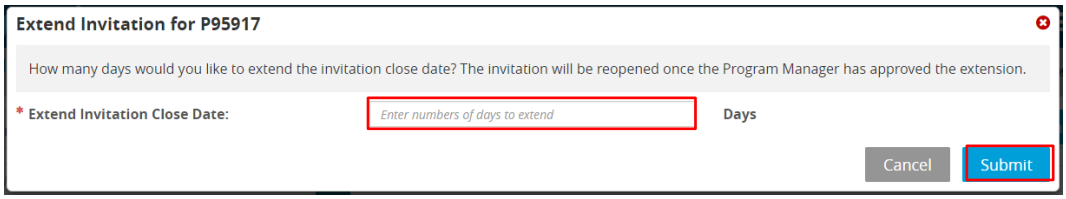
- This can only be done after the initial invitation period closes and **before** the ballot opens ("PreBallot" or "PreBallot Review" stage).

Instructions:

1. On the **myProject** Home Screen click **Menu**.
2. Click **Invitations/Ballots**.
3. Use the **Search Ballots** box or **Filter by Stage** to locate the ballot you wish to extend.
4. Click **Extend Invitation**.



5. Enter the number of days you wish to extend the invitation.
6. Click **Submit**. The extension request will be sent to the Program Manager for approval.



6.5 Join SA Ballot Group (Individual and Entity Balloting)

Applicable Users:

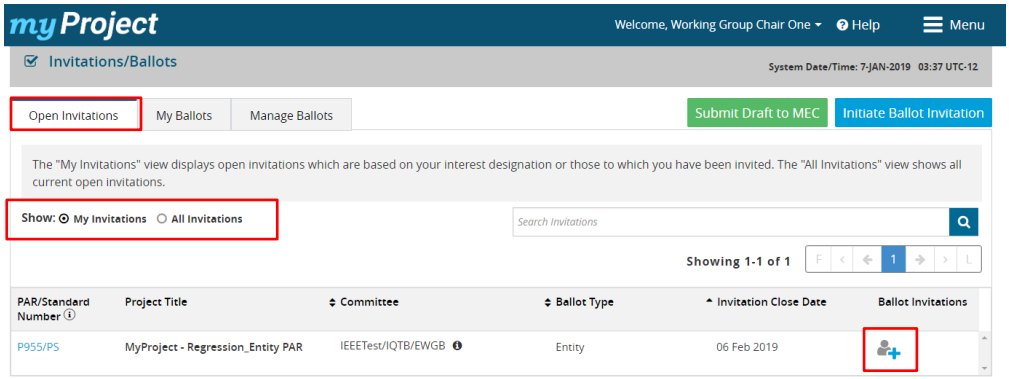
- All IEEE SA Members

Notes:

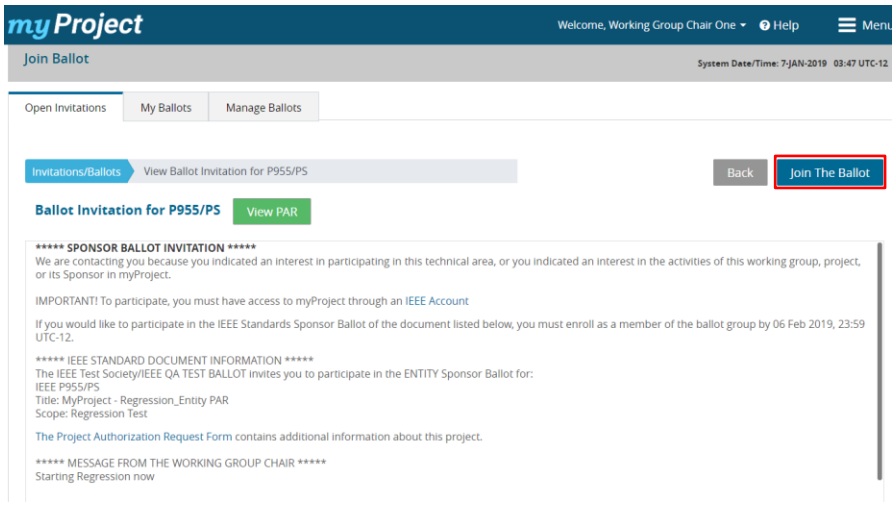
- You are required to be an IEEE SA member or pay a per-ballot fee to join an IEEE SA ballot.
- Joining a ballot allows you to vote and submit comments when the project opens for balloting.
- Balloting group members have an obligation to respond during the balloting period; failure to return a ballot may disqualify the balloter from participation in future balloting groups.
- You can easily add or remove yourself from a balloting group, but only while the balloting group is forming. Your participation is fixed after the ballot invitation closes.

Instructions:

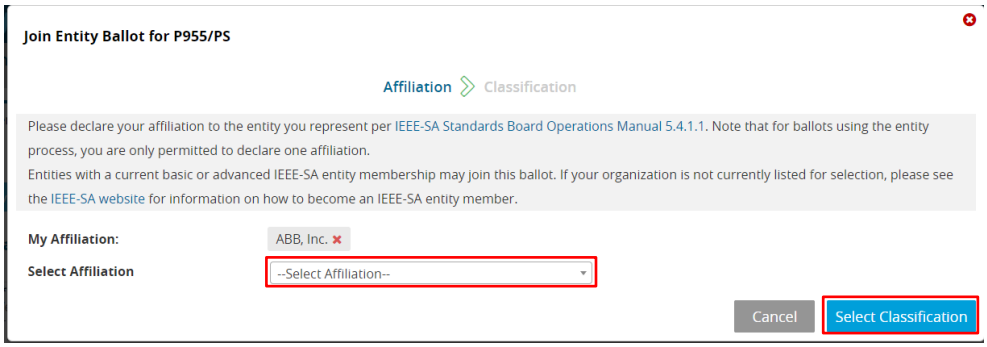
1. On the **myProject** Home Screen click **Menu.**
2. Click **Invitations/Ballots.**
3. Click the **Open Invitations** tab. The default view is **My Invitations** which displays only invitations which are based on your interest designation and to which you have been invited. The **All Invitations** view shows all current open invitations.
4. Under Ballot Invitations, click the **Join Ballot Group** icon.



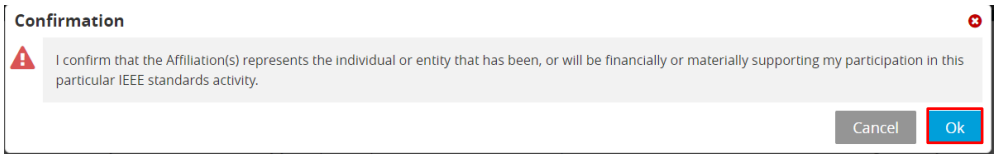
5. Review the invitation and click **Join the Ballot**.



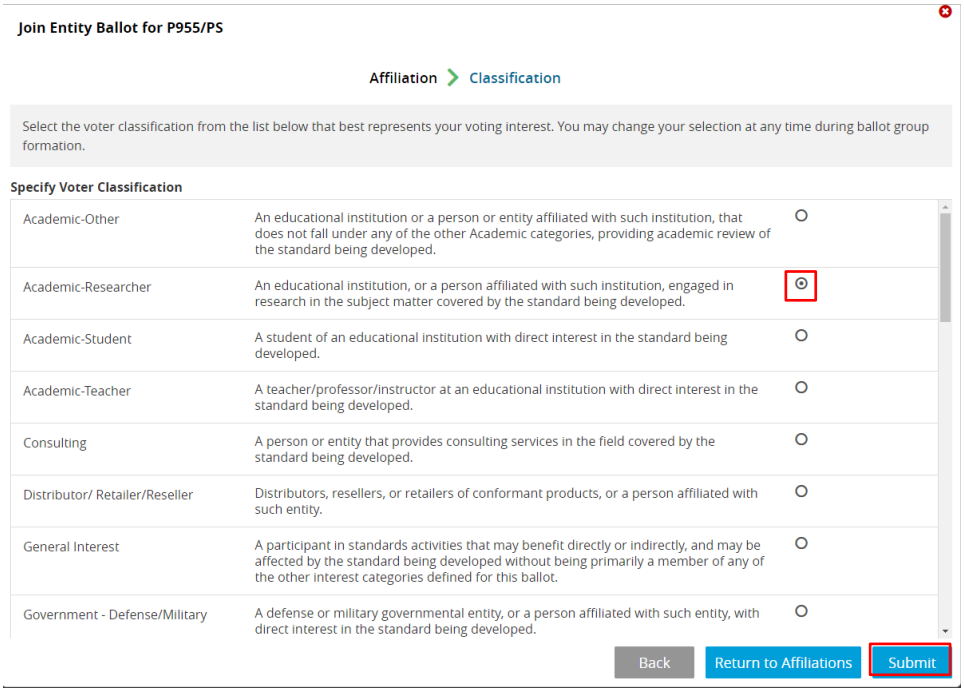
6. Declare an **affiliation** to the entity you represent.
   - Your employer will be displayed as your affiliation by default. To add another affiliation, type the organization name into the box. Approved organizations matching your text will appear in a list. Click on any organization to select it or type the full organization name and click **Add.**
   - To remove an affiliation click the **x** next to the organization name.
   - If you are joining an entity ballot, you must be affiliated with a basic or advanced corporate member. If you are the first person to join an entity ballot, you will become the EBR (entity ballot Representative). If the EBR is already assigned, you will become the EBRA (entity ballot representative alternate). If both roles are already assigned, you will be added to a waiting list.
7. Click **Select Classification**.



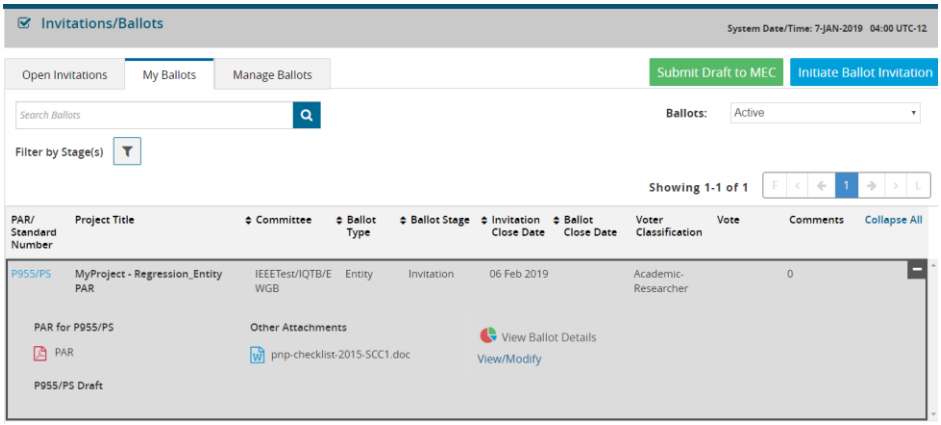
8. Click **OK** to confirm.



9. Select the voter classification from the list that best represents your voting interest.
10. Click **Submit**.



11. Click **OK**. The Balloting group you have joined will now appear on the My Ballots tab in the Invitations/Ballots area.



6.6 Pay to Join a Single Ballot (Individual Balloting)

Applicable Users:

- All Non IEEE SA Members.

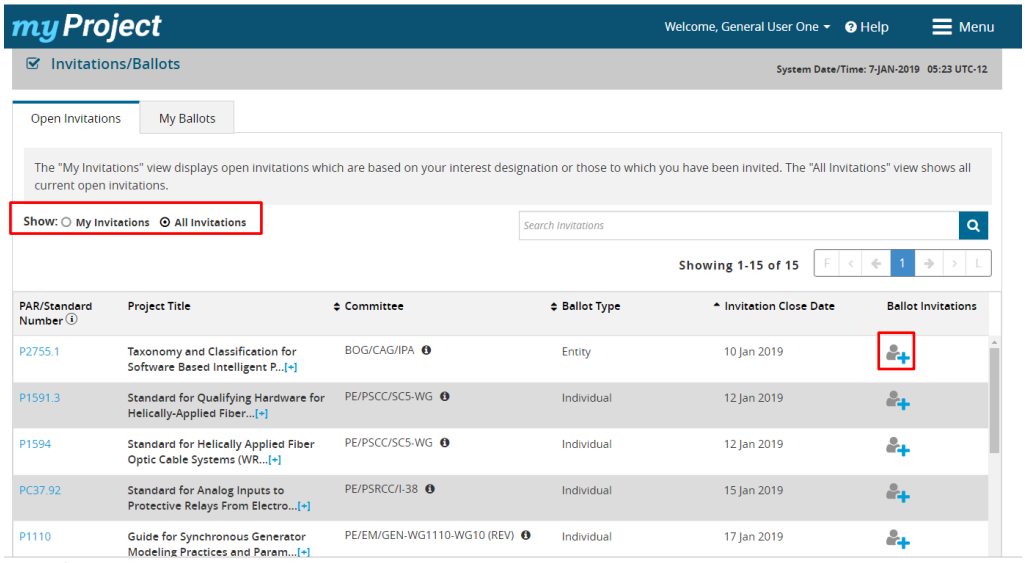
Notes:

- You are required to be an IEEE SA member or pay a per-ballot fee to join an IEEE SA individual ballot group.
- Joining a ballot group allows you to vote and submit comments when the project opens for balloting.
- You can easily add or remove yourself from a balloting group, but only while the balloting group is forming. Your participation is fixed after the ballot invitation closes.
- Be sure to leave enough time to process your payment/membership before the close of the ballot invitation.
- While you do not have to be an IEEE member or IEEE Society member to join the SA, it is far more cost effective to do both:
    - IEEE SA membership entitles you to unlimited individual balloting.
    - If you currently are or become an IEEE Member or Society Member, you can add SA membership to your IEEE Membership or Society Membership at a reduced price.
    - The most expensive option is to join a single ballot. Single ballot fees are higher than annual membership in the IEEE SA, and entitle you to join just one ballot group and any recirculations of that ballot. To take advantage of this service which is unavailable online, complete the form at least 5 working days prior to invitation closing to allow time for processing.
    - More information on membership can be found at: http://standards.ieee.org/membership/

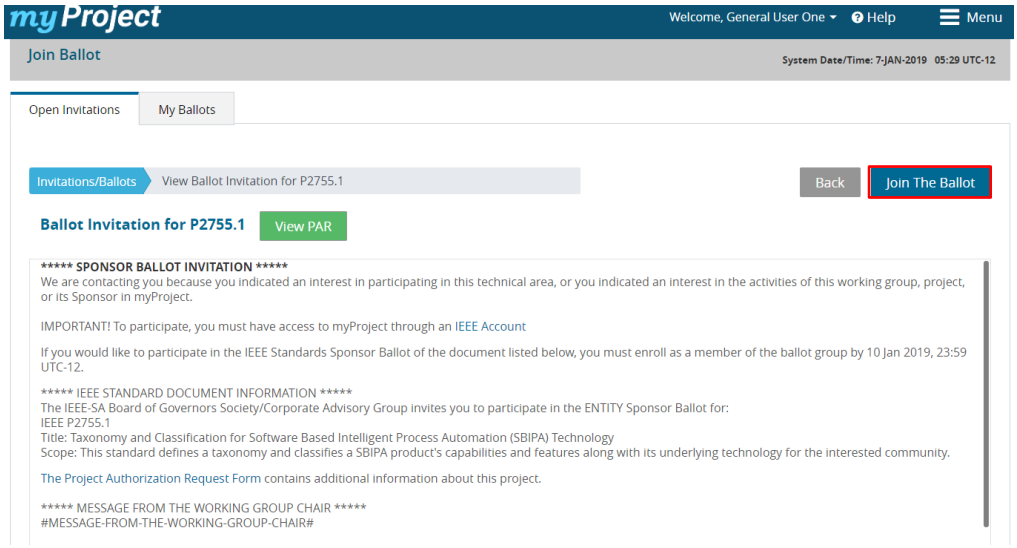
Instructions:

1. On the **myProject** Home Screen click **Menu.**
2. Click Invitations/Ballots. The Open Invitations tab will appear. By default, the **My Invitations** view will display any invitations you have received based on your interest designation. Click **All Invitations** view to display all open invitations.
3. Use the **Search Invitations** box to locate the ballot group you would like to join.

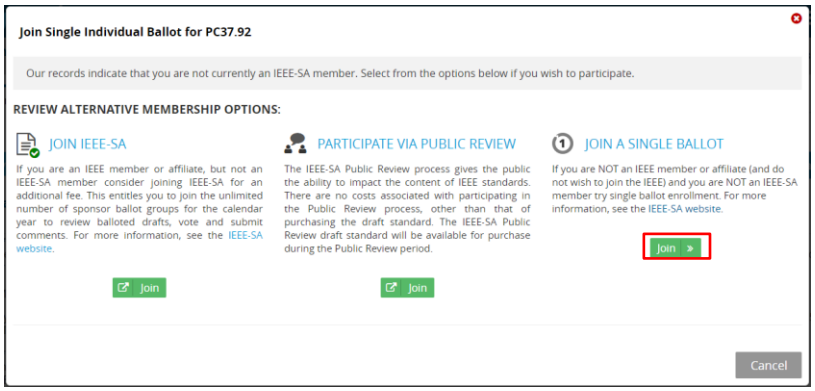
4. Click on the **Join Ballot Group** icon next to the group you would like to join.



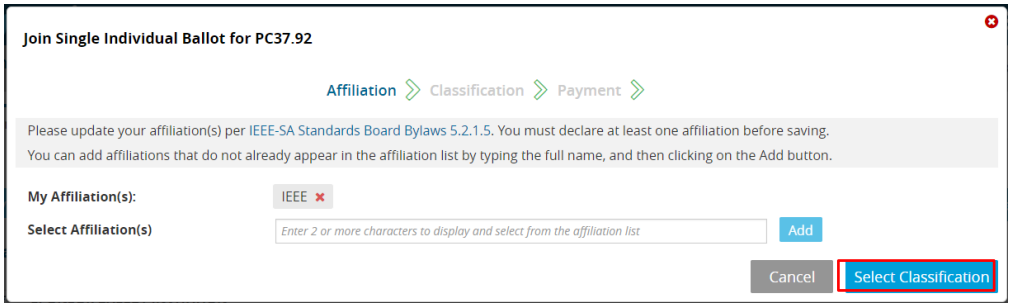
5. Review the invitation and click **Join the Ballot**.



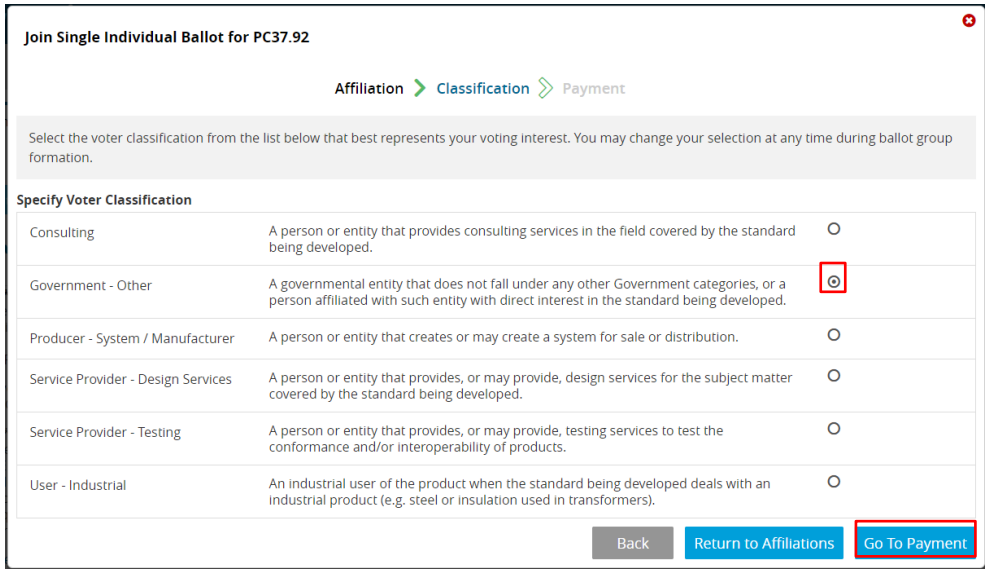
6. Under the **Join a Single Ballot** option, click **Join**.



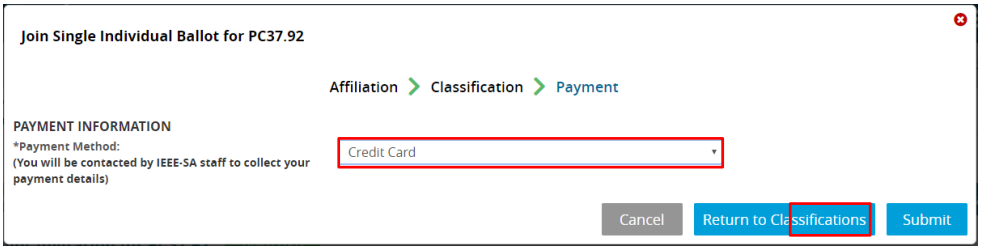
7. Update your affiliation for this ballot.
8. Click **Select Classification** then click **OK**.



9. Select a voter classification from the list that best represents your voting interest.
10. Click **Go To Payment**.



11. Select the desired payment method and click **Submit** and **OK**. The form will automatically be sent to the IEEE SA Balloting Center, which will process your request for the per-ballot fee. If you have any questions or require assistance, please send an email to: sa-ballot@ieee.org



6.7 Approve Single Ballot Request

It may be necessary to override an individual's membership status so that individual can participate in a ballot. This is usually done if an application is in process and membership will not be official before the ballot invitation closes or if an individual has paid the balloting fee.

Applicable Users:

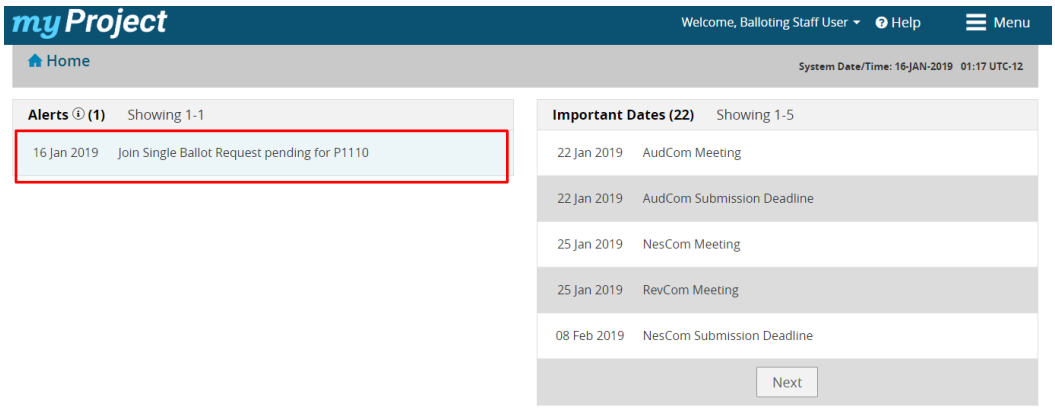
- Balloting Staff

Notes:

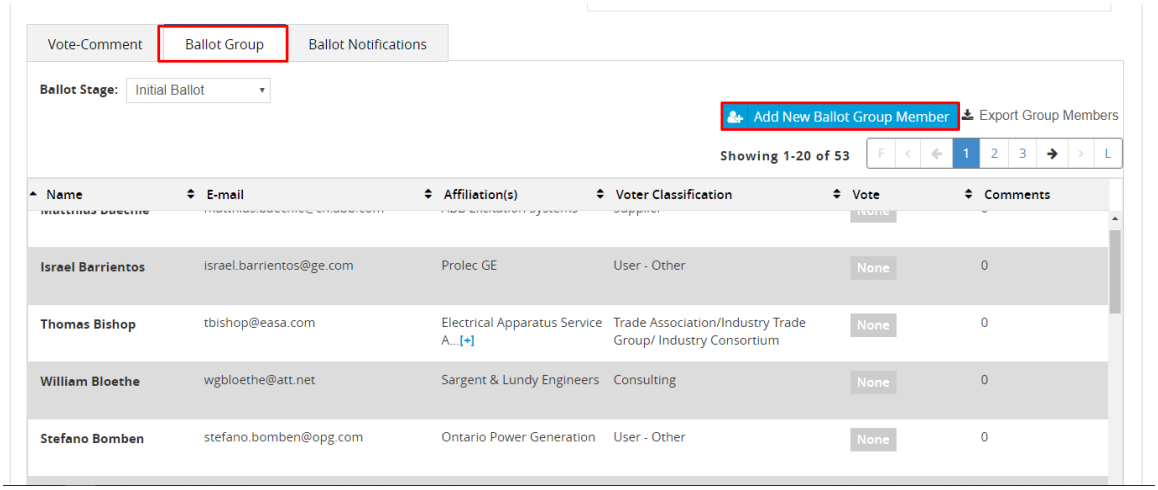
- This may only be done while the ballot is in the invitation stage.

Instructions:

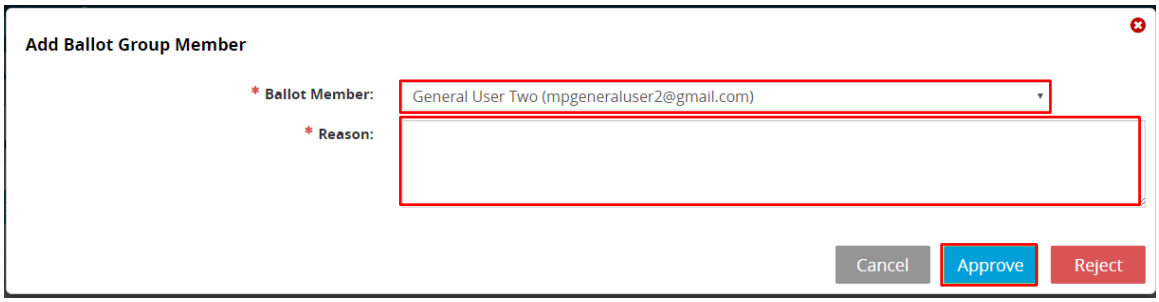
1. On the **myProject** Home Screen, click on the **Alert** that indicates that a *Join Single Ballot Request* is pending.



2. Scroll down to the **Ballot Group tab**.
3. Click on **Add New Ballot Group Member**.



4. From the **Ballot Member** drop down, select the individual to be added as a ballot member.
5. Enter a reason in the **Reason** box.
6. Click on **Approve** or **Reject**. Click **Yes** to confirm.



6.8 Manage Ballot Representatives (Entity Balloting)

Participation in Entity Ballots is limited to IEEE SA Entity Members. These entities are represented by an EBR (Entity Ballot Representative) and EBRA (Entity Ballot Representative Alternate). Any employee of the Entity Member institution may enroll as the EBR or EBRA if the slot has not already been filled. Only the EMR (Entity Member Representative) has the ability to replace the EBR or EBRA.

Applicable Users:

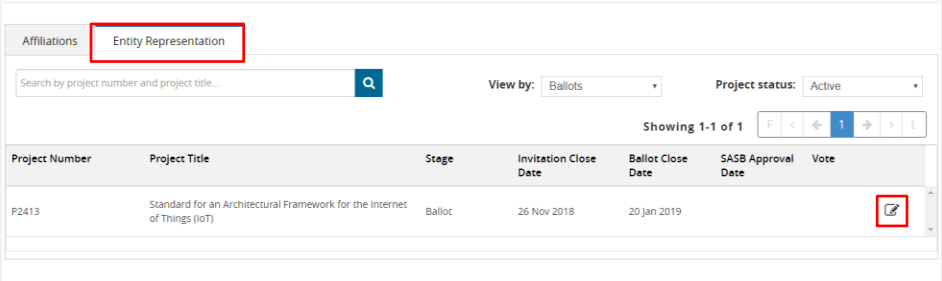
- EMR

Notes:

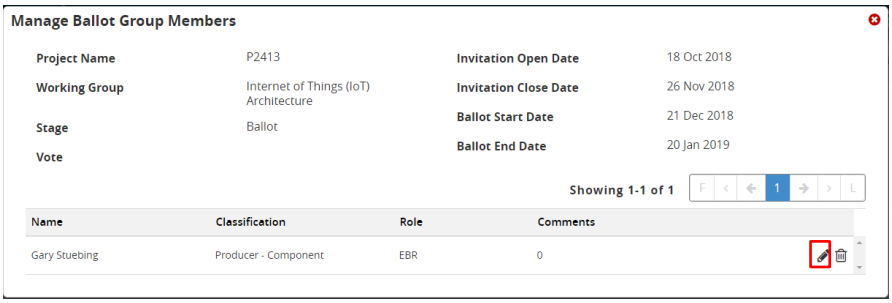
- Users must already be enrolled in the entity project to be added as EBR or EBRA and it is recommended that they enroll themselves as EBR and EBRA. For more information on joining an entity ballot, see **Sec 6.5 Join SA Ballot Group (Individual and Entity Balloting)**

Instructions:

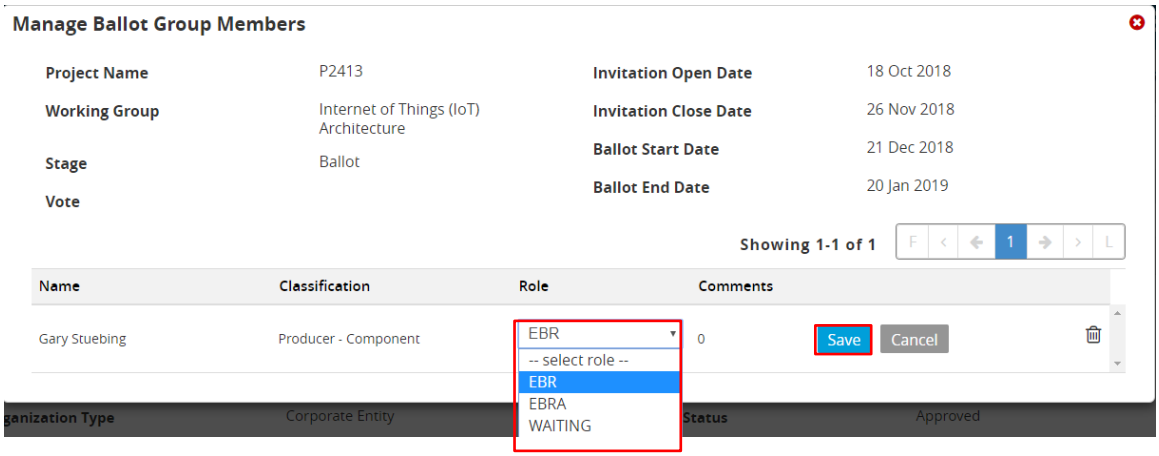
1. On the myProject Home Screen, click **Menu**.
2. Click **Entity Management**.
3. Click **Entity Representation** tab.
4. Use the search field to locate the project for which you wish to manage the ballot representative. Click the **Edit** icon.



5. Click the **Edit** icon next to the ballot group member whose role you wish to change.



6. Use the **Role** dropdown to change the ballot group member's role.
7. Click **Save**.



8. You will see individuals currently enrolled as the EBR and EBRA as well as a waiting list of other individuals who have expressed interested in the ballot.
    - As EMR, you will automatically be added to the waiting list and can assign EBR permission to yourself if necessary.

6.9 *Remove Yourself from a Ballot*

Applicable Users:

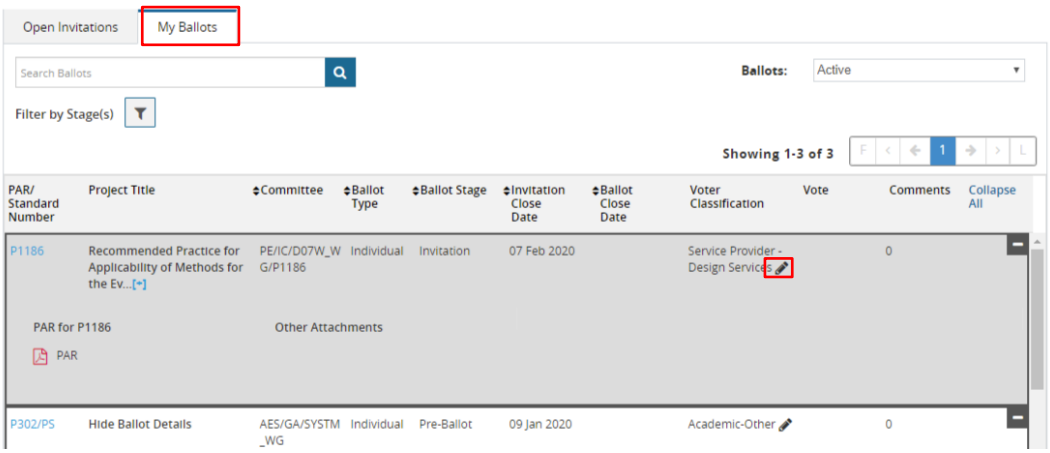
- IEEE SA members currently enrolled in a ballot

Notes:

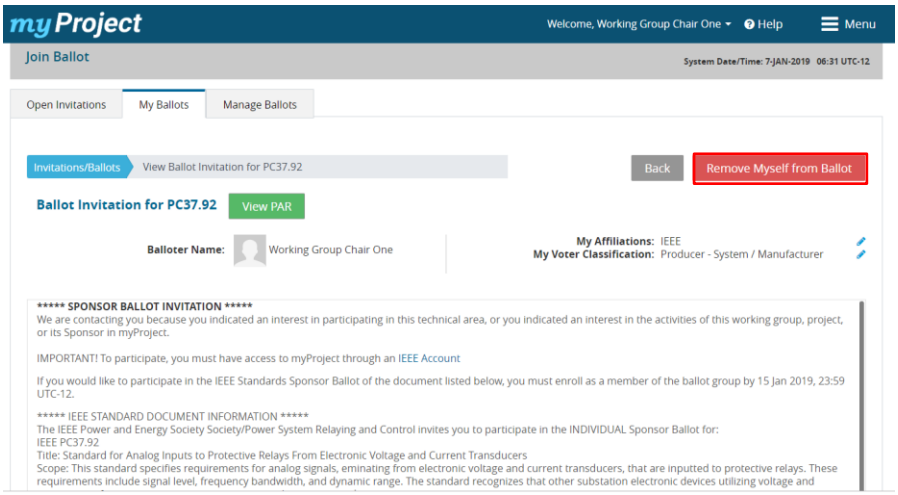
- You can easily remove yourself from a balloting group, but only while the balloting group is forming.
- Your participation is fixed after the ballot invitation closes.
- If you have paid a per-ballot fee or your membership is processing, you will not be able to remove yourself from a ballot.
- Instructions for Entity Balloting are the same, but ballots are accessed through the "**Entity**" tab instead of the "**Balloting**" tab.

Instructions:

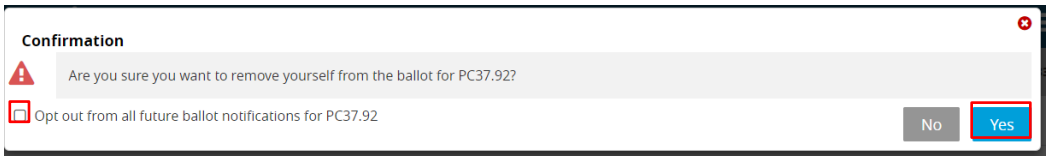
1. On the **myProject** Home Screen click **Menu**.
2. Click **Invitations/Ballots**.
3. Click the **My Ballots** tab.
4. Use the **Search Ballots** box or **Filter by Stage** function to locate the ballot group you want to remove yourself from.
5. Click the edit pencil next to your voter classification for the ballot you wish to modify.



6. Click **Remove Myself from the Ballot**.



7. Click **Yes** to confirm. Click the **Opt out** box to prevent future ballot notifications for this ballot.



6.10 Change Your Voter Classification or Affiliation

Applicable Users:

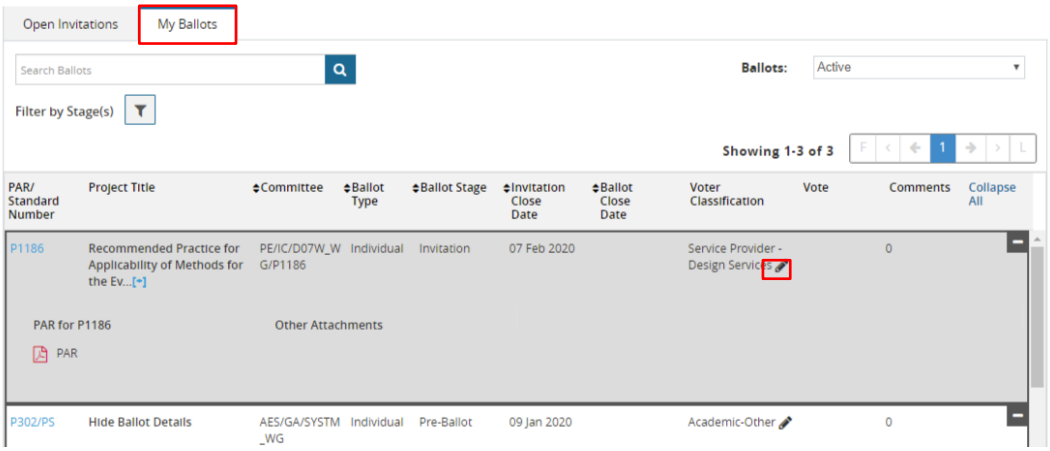
- IEEE SA members currently enrolled in a ballot

Notes

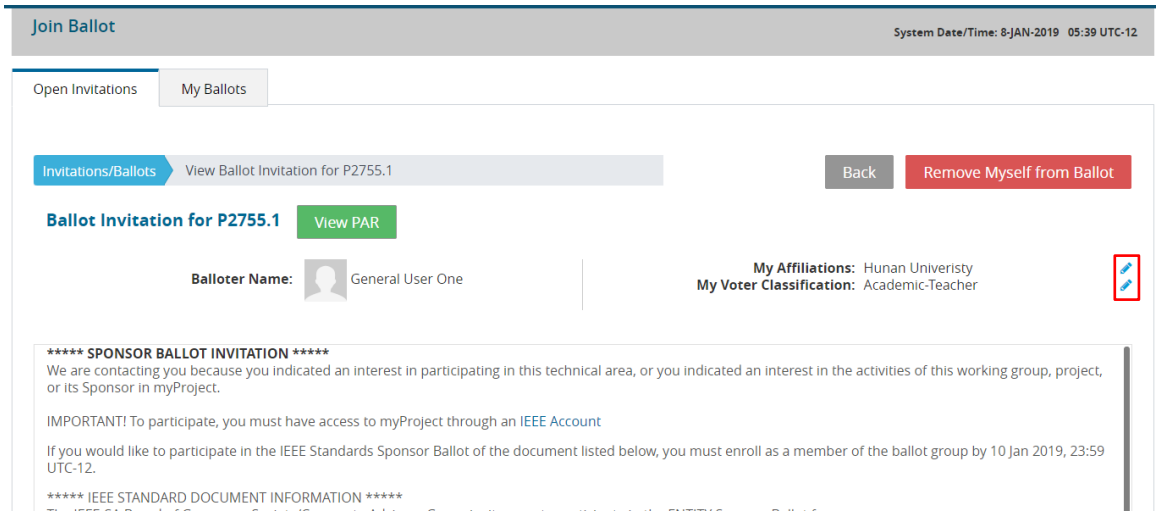
- You may change your voter classification on any single ballot during an invitation period only.
- If you have paid a per-ballot fee or your membership is processing, you will not be able to change your voter classification. IEEE SA staff must make any necessary changes.
- Changing affiliation for an entity ballot will result in you removing yourself from the ballot and re-joining under a new entity. If representatives have already been assigned for that entity you may be placed in the waiting list.
- Only the EBR will be able to modify the balloter classification for an entity ballot.

Instructions:

1. On the **myProject** Home Screen click **Menu**.
2. Click **Invitations/Ballots**.
3. Click the **My Ballots** tab.
4. Use the **Search Ballots** box or **Filter by Stage** function to locate the ballot group you want to modify.
5. Click the edit pencil next to your voter classification for the ballot you wish to modify.



6. Click the **Edit** icon next to **My Affiliations** or **My Voter Classification**.



1. Follow the on-screen instructions to complete your modifications.

6.11 Initiate Standards Association Ballot

Once the ballot invitation is closed and the ballot group has been balanced, it is time to prepare the draft and initiate the ballot.

Applicable Users:

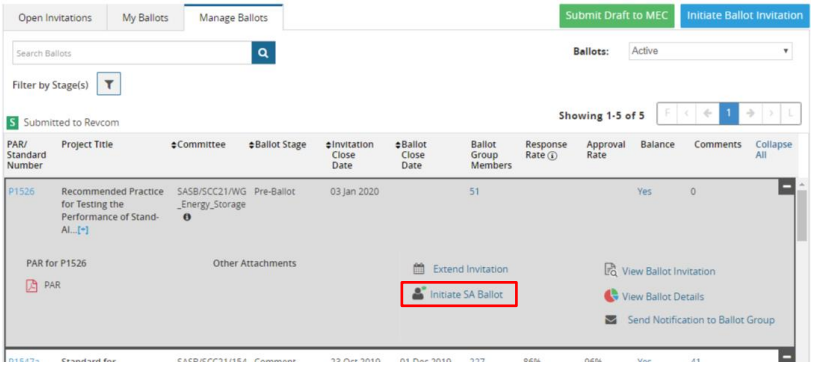
- Standards Committee Chair, Standard Representative, Working Group Chair/Co-Chair/Vice-Chair

Notes:

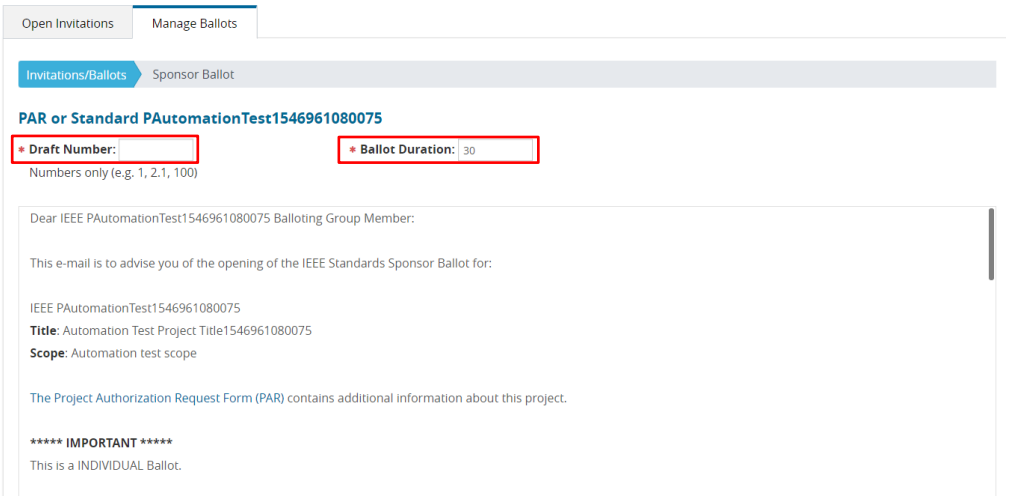
- Ballots cannot be opened unless all permission letters for borrowed material have been received, reviewed and approved by staff.
- The ballot will not actually open until your program manager approves the uploaded draft.
- A cover letter is not required.

Instructions:

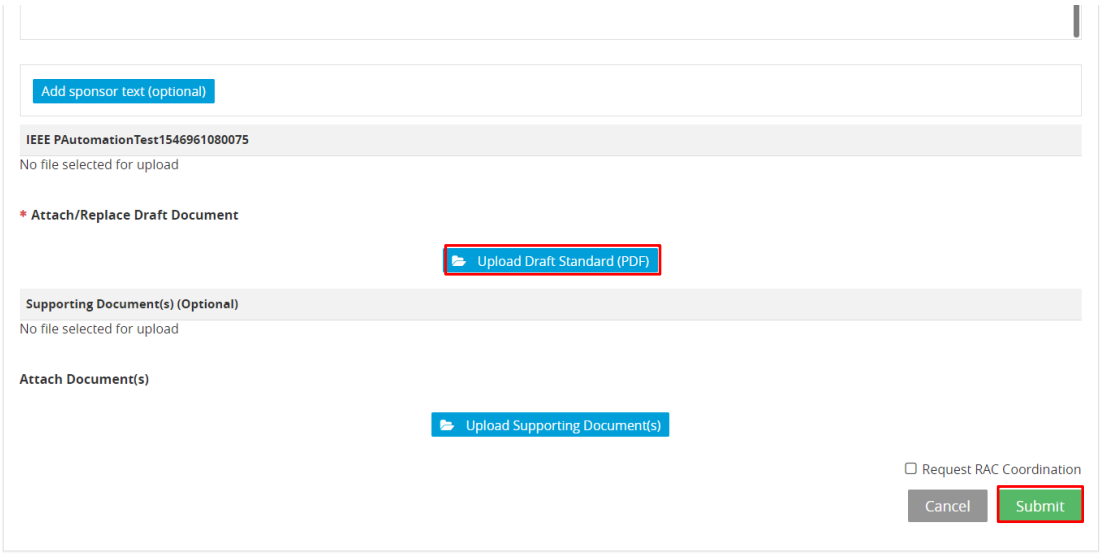
1. On the **myProject** Home Screen click **Menu**.
2. Click **Invitations/Ballots**.
3. On the Manage Ballots tab, use the **Search Ballots** box or **Filter by Stages** function to locate the ballot you want to create a Standards Committee ballot for.
4. Click **Initiate SA Ballot.**



5. At the top of the screen, enter a **Draft Number** and **Ballot Duration**.



6. Scroll to the bottom of the screen and click **Upload Draft Standard** to attach the required draft.
7. Click **Add Standards Committee Text** (optional)
8. Click **Upload Supporting Documents** (optional).
9. Check the **Request RAC Coordination** box to notify the RAC admin of this ballot activity. If your PAR indicated registration activity related to this project, the box will be checked by default.
10. Click **Submit** and **OK** to confirm. The Standards Committee Ballot will be sent to the Program Manager for approval.



6.12 Review/Approve Standards Committee Ballot

Applicable users:

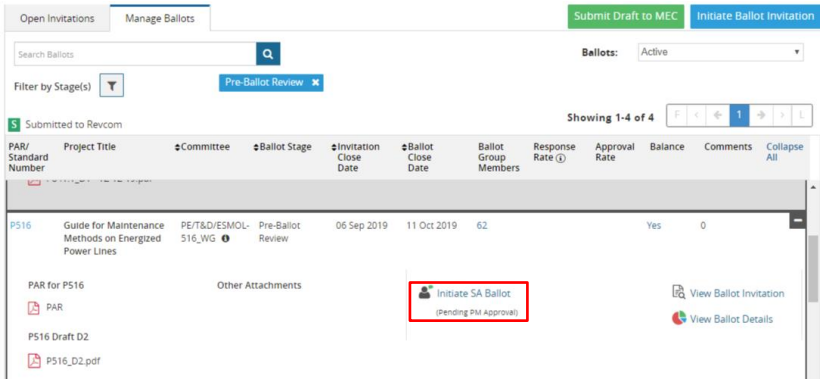
- Program Manager

Notes:

- The ballot will not open until a program manager approves the uploaded draft.
- The Program manager can replace the draft before approval.

Instructions:

1. On the myProject Home Screen click the **Alert** that indicates a ballot is waiting for approval **OR** click **Menu** and choose **Invitation/Ballots**.
2. On the **Manage Ballots** tab, use the **Search Ballots** or **Filter by Stage** features to locate the ballot that needs approval.
3. Click **Initiate SA Ballot.**



4. Review the Ballot invitation. If necessary, edit the **Draft Number** or **Ballot Duration**
5. If desired, click **Add Standards Committee message**.
6. Click **Upload Draft Standard** to attach or replace a draft document.
7. Click **Upload Supporting Documents** if required.
8. Click **Approve** or **Reject**.

6.13 Vote and/or Comment on a Ballot

Members of a ballot group will be able to log or change a vote on that ballot during the ballot period.

Applicable users:

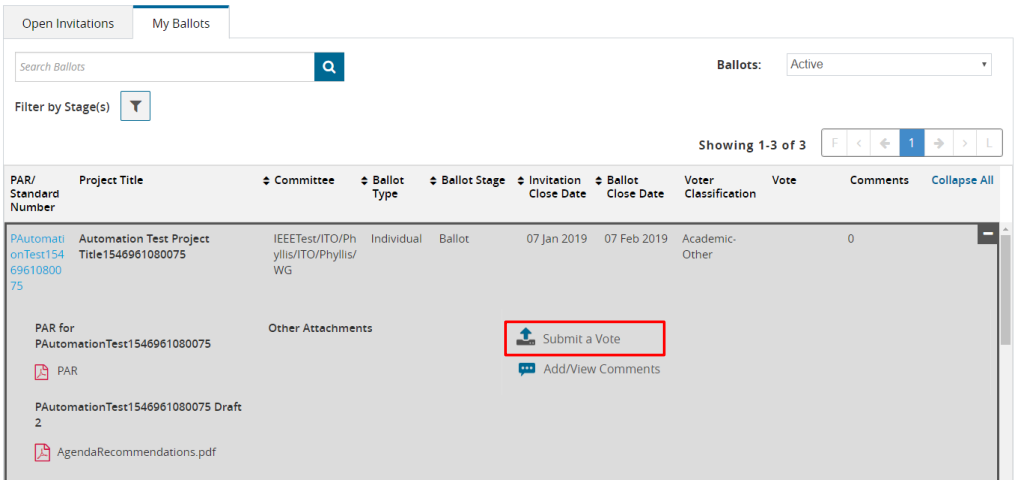
- myProject users currently enrolled in a ballot

Notes:

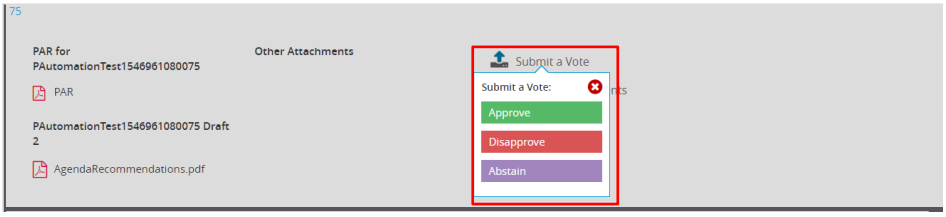
- You will be able to select a vote from a list of the following: Approve, Disapprove, Abstain.
- In order to submit comments, you must log a vote.
- If the selection is "abstain", you must select a reason from the following: Lack of time, lack of expertise, conflict of interest, other.
- You can change your selection at any time during an open ballot or a recirculation period; the vote made during the ballot or the most recent recirculation, if applicable, will be carried forward to the following recirculation until it is changed
- Once the ballot period is closed, you will only be able to change or flip your vote from "disapprove" to "approve" or "abstain". You may only do this once and may not change back to a "disapprove" vote. The change/flip vote option will be available until the project has been recommended for approval/disapproval by RevCom.
- If you change a vote during the ballot or recirculation period FROM "disapprove" to "approve" or "abstain", the "must be satisfied" value of "yes", will be set to "no" automatically. You will be presented with a message explaining this and asked for confirmation.

Instructions:

1. On the **myProject** Home Screen, click **Menu**.
2. Click **Invitations/Ballots**.
3. Click the **My Ballots** tab.
4. Use the **Search Ballots** box **or Filter by State** function to locate the ballot you want to vote on.
5. Click **Submit a Vote**.

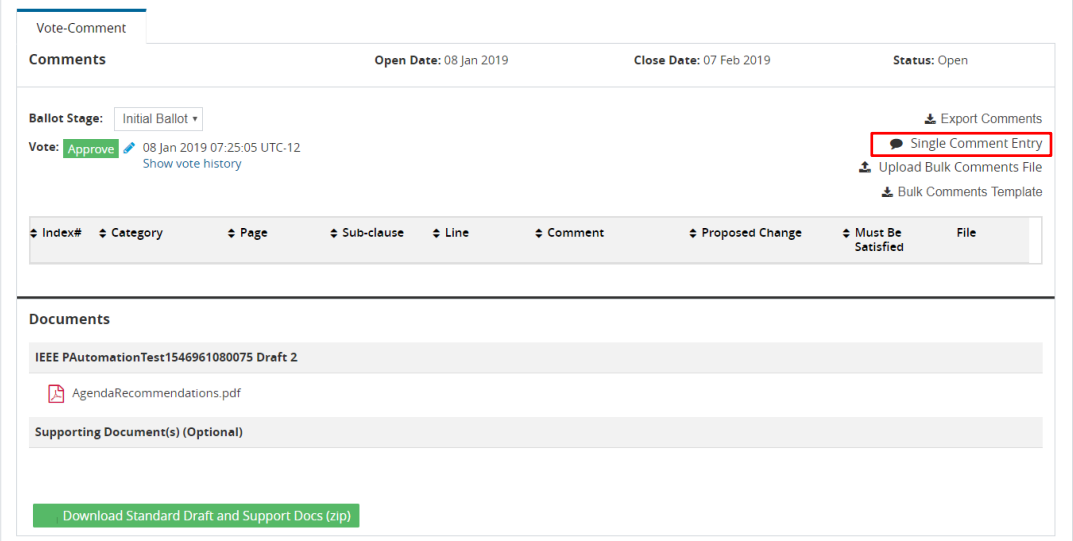


6. Click **Approve**, **Disapprove** or **Abstain**.

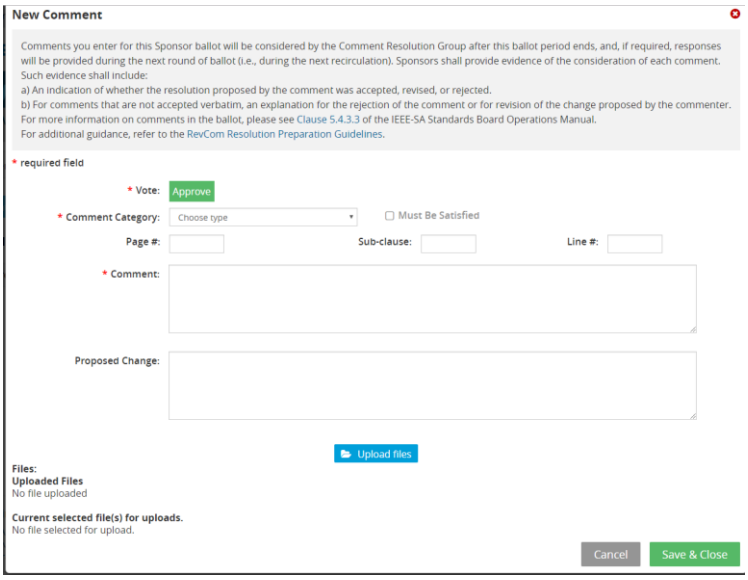


1. Once you've voted, the system will allow you to add and view comments. Click on **Add/View Comments**.

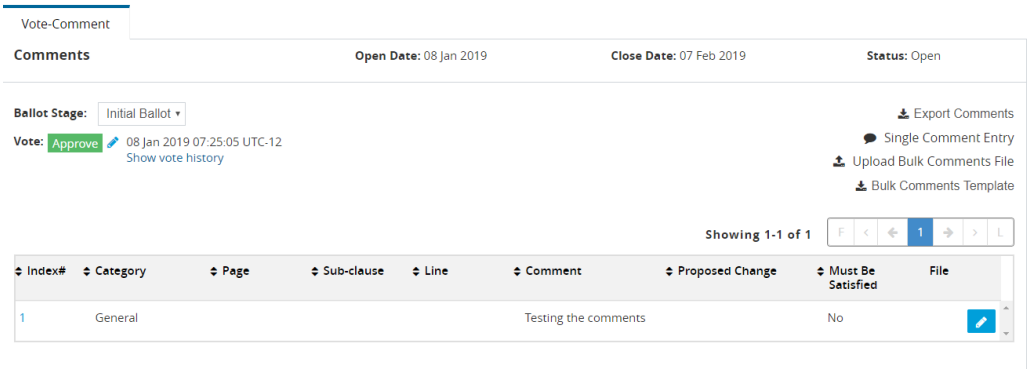
2. Click **Single Comment Entry**.



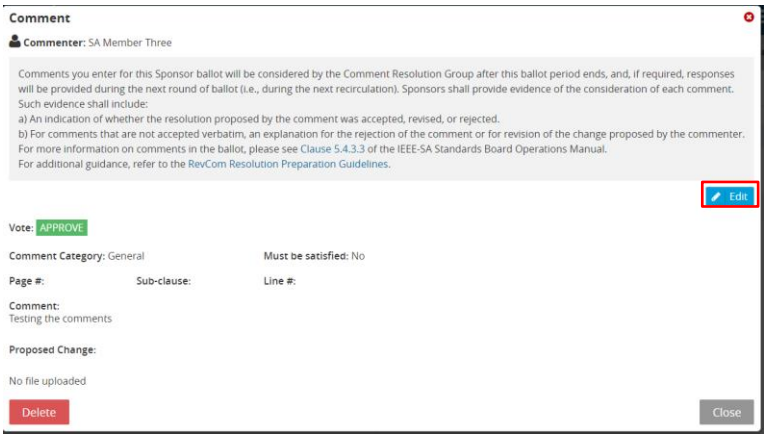
3. Use the **Comment Category** drop down to choose a category for your comment.
4. Enter your comment in the **Comment** box. Enter any other optional information or upload files.
5. Click **Save and Close.**



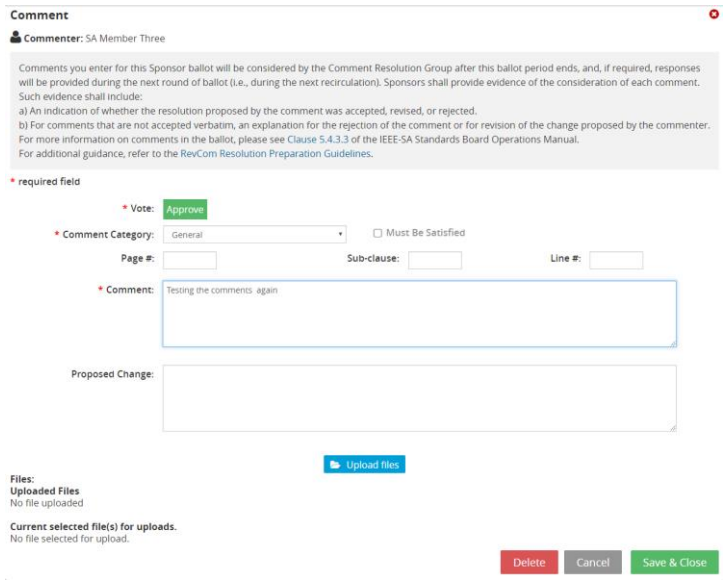
6. Your comment will now appear on your My Ballots page and will be visible only to you and the administrators of the ballot.



7. To change your comment, click on the comment and click **Edit** or **Delete**.



8. Make changes to your comment and click **Save and Close**.



6.14 Change (Flip) a vote

After a round of balloting closes, voters who have voted "Disapprove", may "flip" their vote to either "Approve" or "Abstain" at any time before recirculation or the RevCom meeting.

Applicable users:

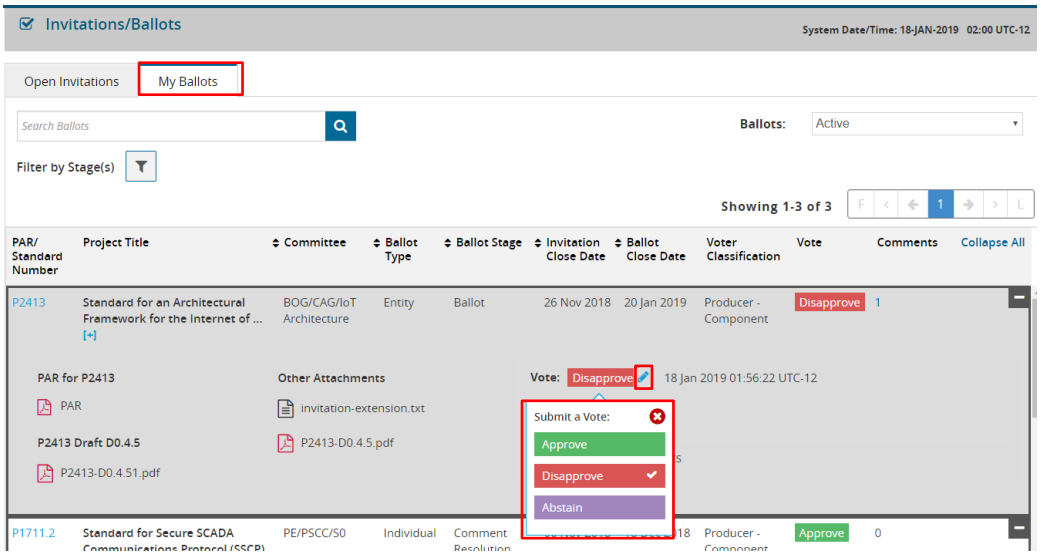
- myProject users who have voted "Disapprove" on a ballot.

Notes:

- You will receive notification of your vote change. This notification will be included with the RevCom submission.
- You may only change your vote once using this feature. You will not be able to change the vote back to "Disapprove".

Instructions:

1. On the **myProject** Home Screen, click **Menu**.
2. Click **Invitations/Ballots**.
3. Click on the **My Ballots** tab.
4. Use the **Search Ballo**ts box to locate the ballot with the vote you wish to change.
5. Click the **edit** icon next to the current vote.



6. Click the new vote you want to submit. Click **Yes** to confirm. After confirming your change, a message will be sent to you, the Working Group Chair and Standards Committee Chair notifying them of the flipped vote.

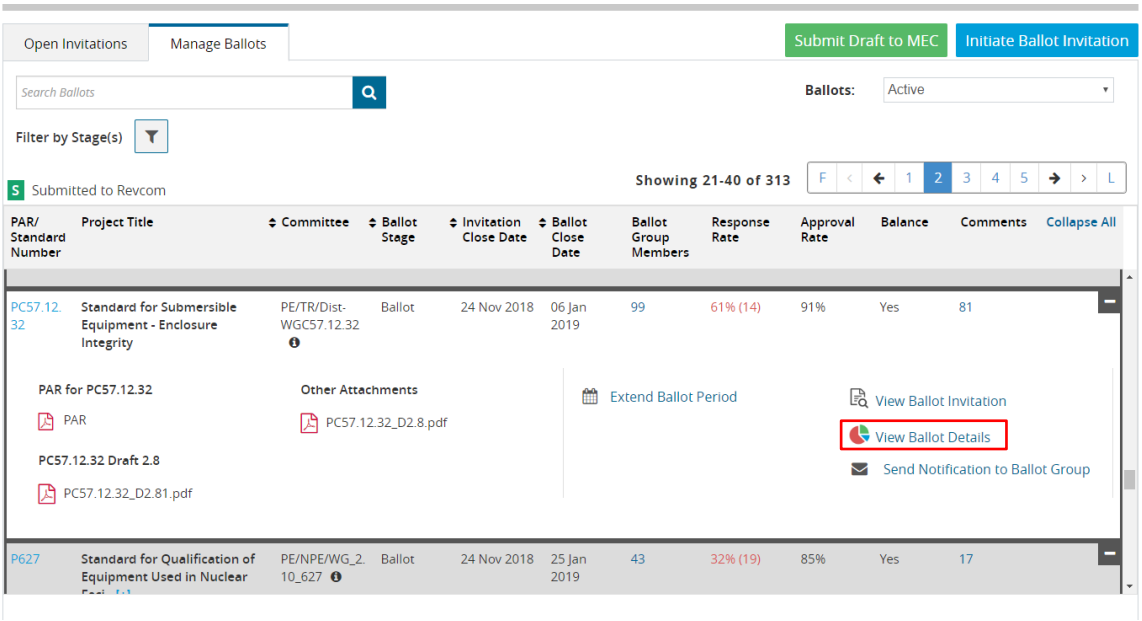
6.15 View Ballot Details

Applicable Users:

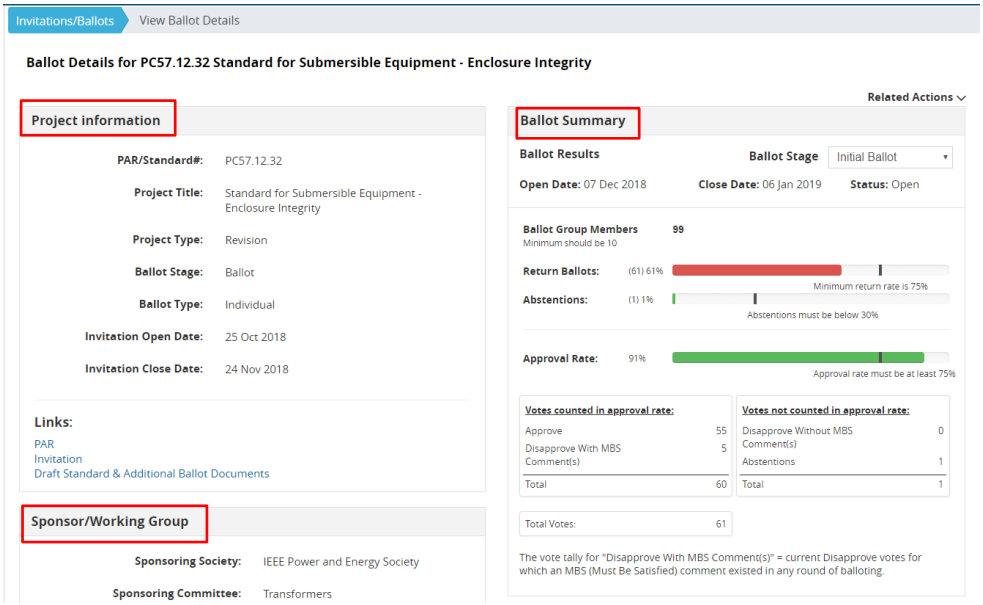
- Standards Committee Chair, Standard Representative, Working Group Chair/Co-Chair/Vice-Chair, Project Chair/Admin, IEEE Staff

Instructions:

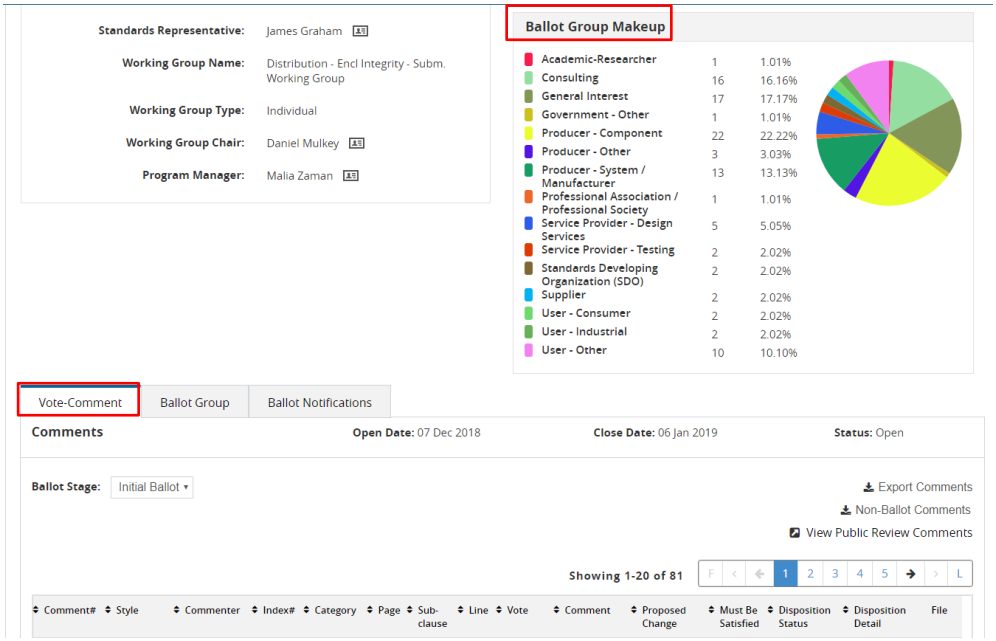
1. On the **myProject** Home Screen click **Menu**.
2. Click **Invitations/Ballots**.
3. Click the **Manage Ballots** tab.
4. On the Manage Ballots tab, use the **Search Ballots** box or **Filter by Stages** function to locate the ballot you want to see details of.
5. Click **View Ballot Details.**



6. The top half of the screen will display **Project Information**, **Ballot Summary** information and **Standards Committee/Working Group** Information.



7. The lower part of the screen contains **Ballot Group Makeup** information and **Vote-Comment** information.



6.16 View Ballot Comments (Balloter)

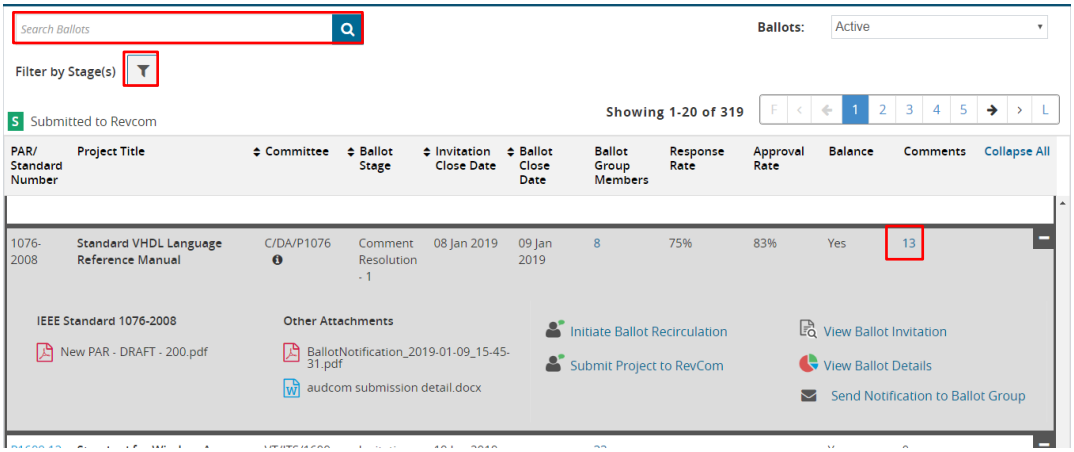
You may view all of the comments you have made on a ballot, along with the resolution status of each comment after the ballot has closed. During recirculation, all comments from previous rounds will be visible.

Applicable Users:

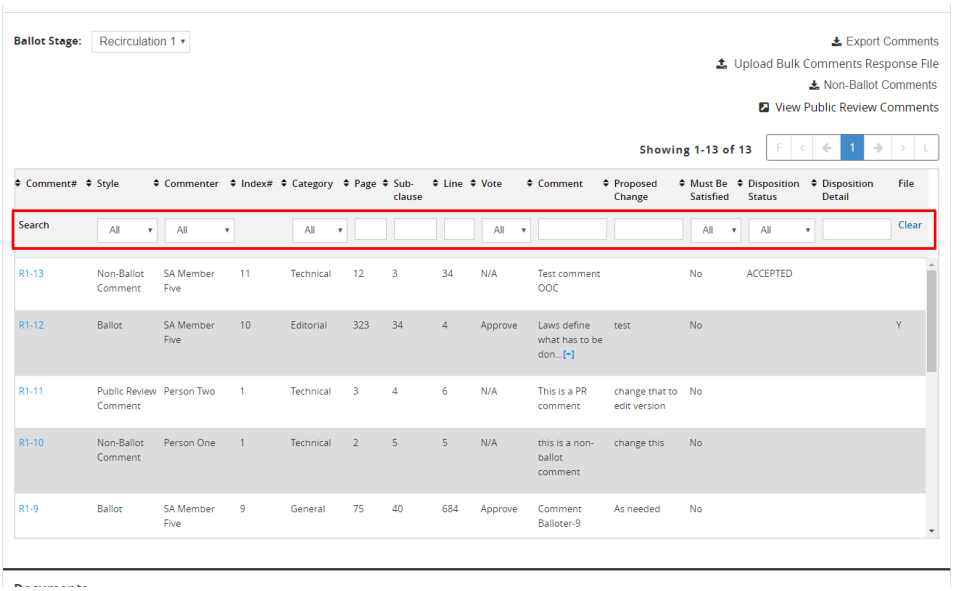
- All myProject users who have participated in a ballot.

Instructions:

1. On the **myProject** Home Screen, click **Menu.**
2. Click **Invitations/Ballots**.
3. Click the **My Ballots tab**.
4. Use the **Search Ballots** box or **Filter by Stage** feature to locate the ballot with comments you want to view.
5. Click on the **number** under the **Comments** column.



6. The comments for the ballot will be displayed. Use the **Search drop downs** to filter for specific commenter, vote, comment, disposition status, etc. Click **Export Comments** to download all comments to an Excel or CSV file.



6.17 Submit Non-Ballot Comment

This feature can be used to submit comments that have been received by the Working Group outside of the myProject system. These comments cannot be marked as "Must Be Satisfied", but will become part of the record that is submitted to RevCom.

Applicable Users:

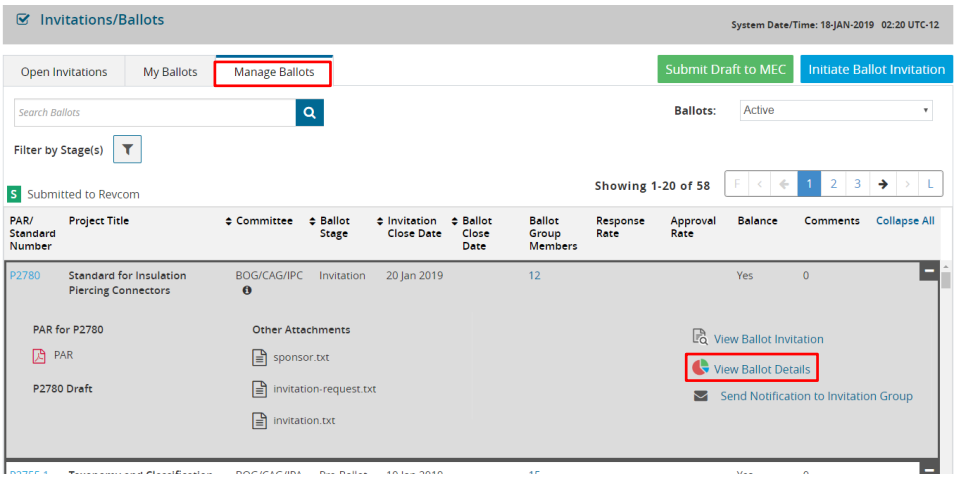
- Standards Committee Chair, Standard Representative, Working Group Chair/Co-Chair/Vice-Chair, Project Group Chair/Administrator

Notes:

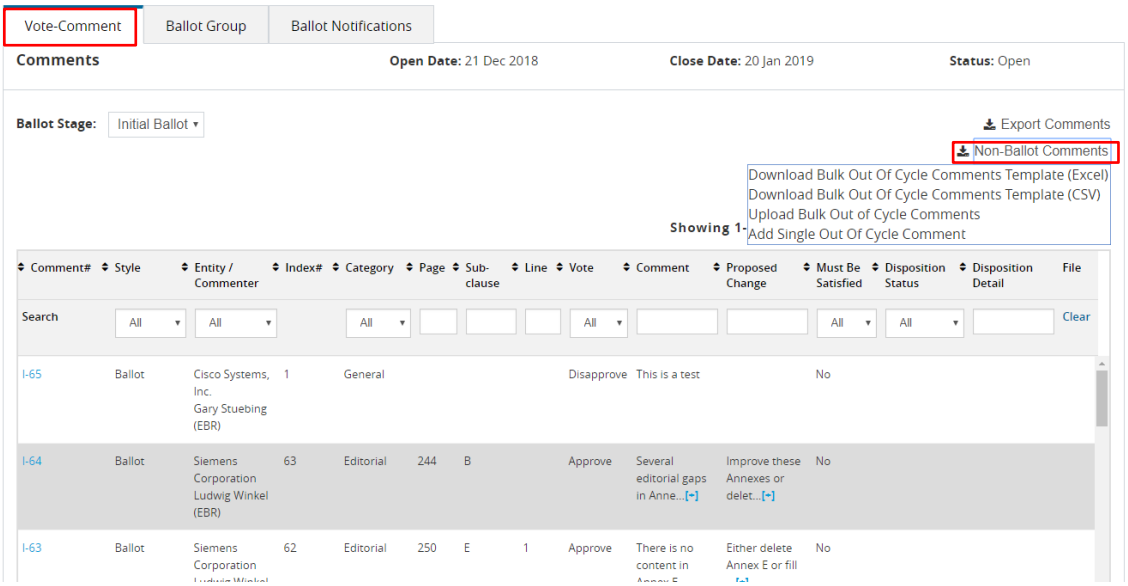
- The system provides templates for creating files for uploading non-ballot comments in bulk.
- Comments received from the Public Review application should be uploaded using this feature.
- Non-ballot comments may be entered during ballot or comment resolution periods.
- Non-ballot comments may be considered by the Comment Resolution Group after the ballot period ends and, if required, responses will be provided during the next round of ballot (i.e. during the next recirculation).

Instructions:

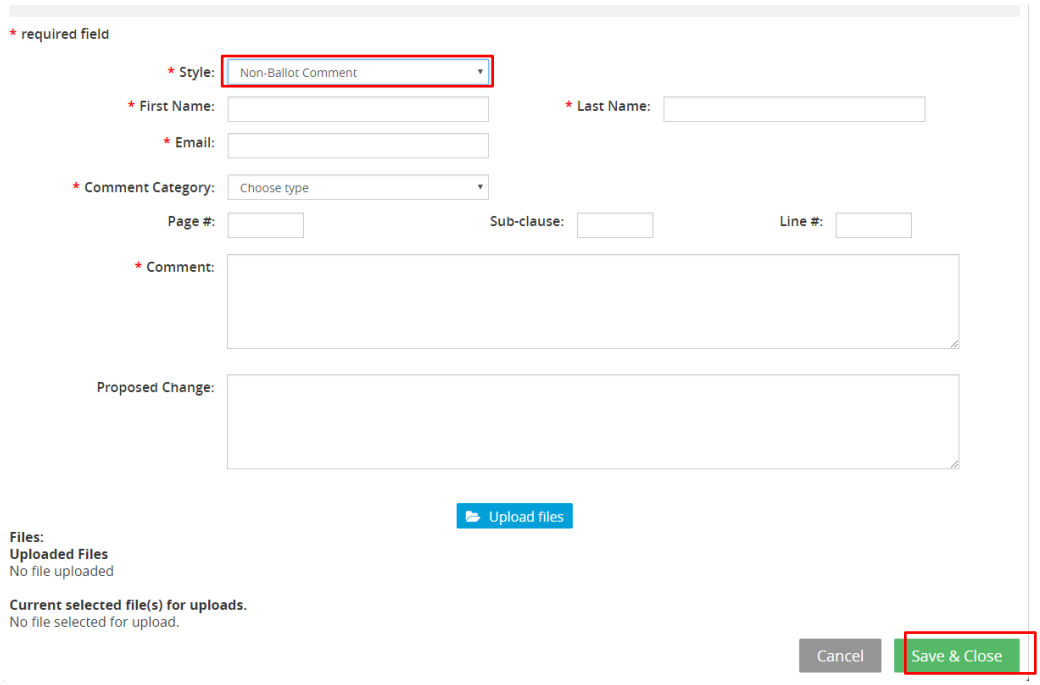
1. On the **myProject** Home Screen click **Menu.**
2. Click **Invitations/Ballots**.
3. On the **Manage Ballots** tab, use the **Search Ballots** field to locate the project to which you want to add non-ballot comments.
4. Click **View Ballot Details**.



5. Scroll down to the **Vote-Comment** tab.
6. Click **Non Ballot Comments**.



7. Choose from the following options:
    a. **Download Bulk Out of Cycle Comments Template** (Excel)
    b. **Download Bulk Out of Cycle Comments Template** (CSV)
    c. Upload Bulk Out of Cycle Comments
    d. Add Single Out of Cycle Comment
8. If adding a single out of cycle comment, fill in the required fields and click **Save and Close**.



6.18 Comment Disposition

6.18.1 *Disposition Status Guidelines*

The IEEE SA has not defined the meaning of the Disposition Status to give leeway to the committee. Here are some guidelines:

- ***Accepted –*** The committee agrees with the comment and implements change exactly as suggested.
- ***Revised –*** The ballot disposition committee accepts the suggested remedy in principle. This means that the ballot disposition committee will make a change to the draft based on a revision of the suggested remedy. The Disposition Detail field shall provide sufficient detail for ballot group members to understand the revision of the suggested remedy provided by the commenter.
- ***Rejected –*** The ballot disposition committee does not accept the suggested remedy. The Disposition Detail field shall provide sufficient detail for ballot group members to understand the rationale for this rejection.

6.18.2 *Respond To Ballot Comments Individually*

Applicable Users:

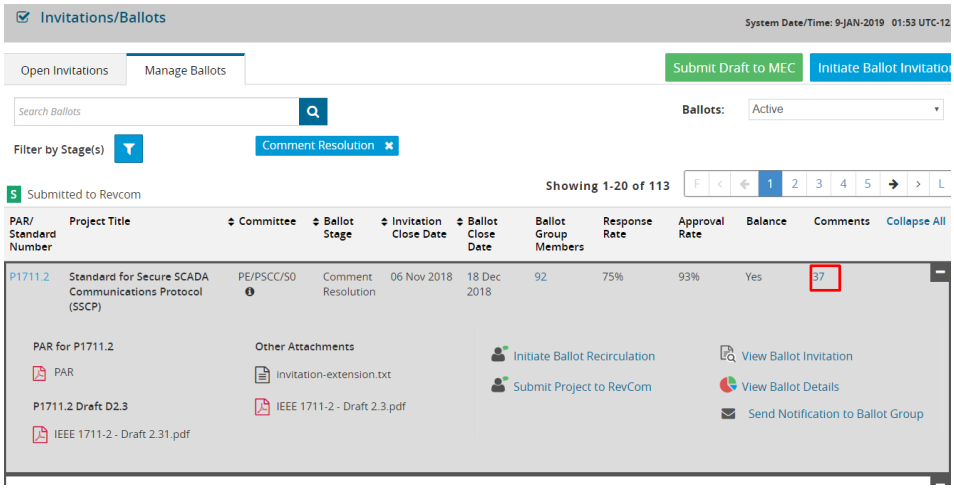
- Standards Committee Chair, Standard Representative, Working Group Chair/Co-Chair/Vice-Chair, Project Group Chair/Administrator

Notes:

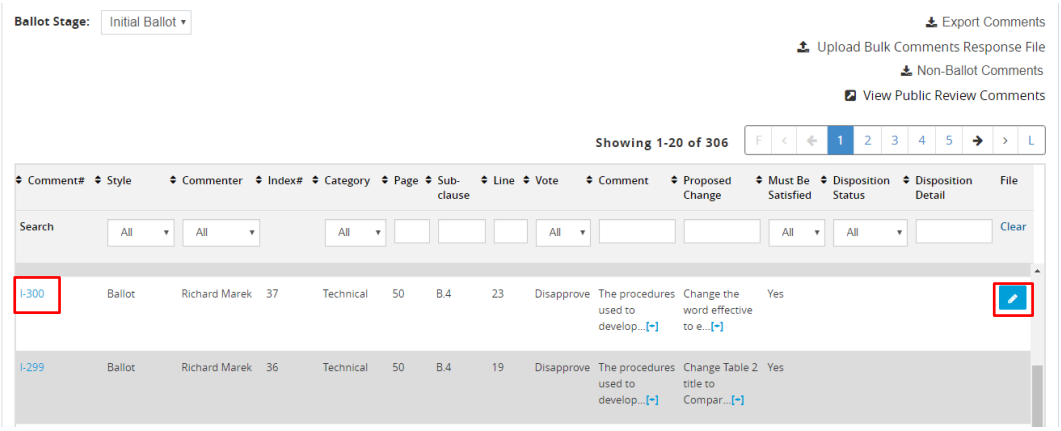
- All comments must be responded to. The response should show that the comment was seriously considered.

Instructions:

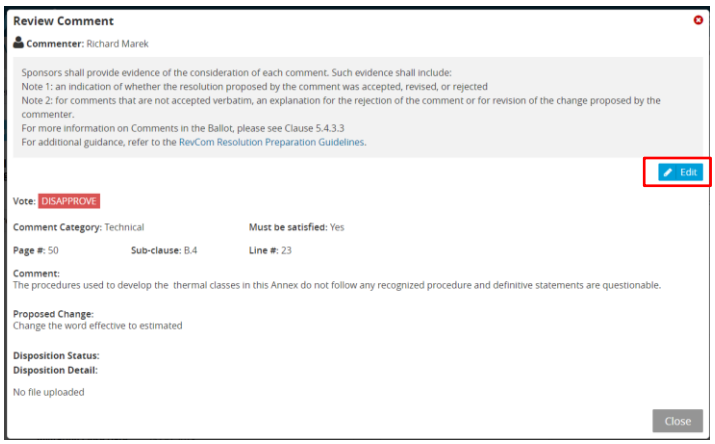
1. On the **myProject** Home Screen click **Menu**.
2. Click **Invitations/Ballots**.
3. Click **Manage Ballots**.
4. Use the **Search Ballots** box or the **Filter by Stage** function to locate the desired ballot.
5. Click on the number in the **Comments** column.



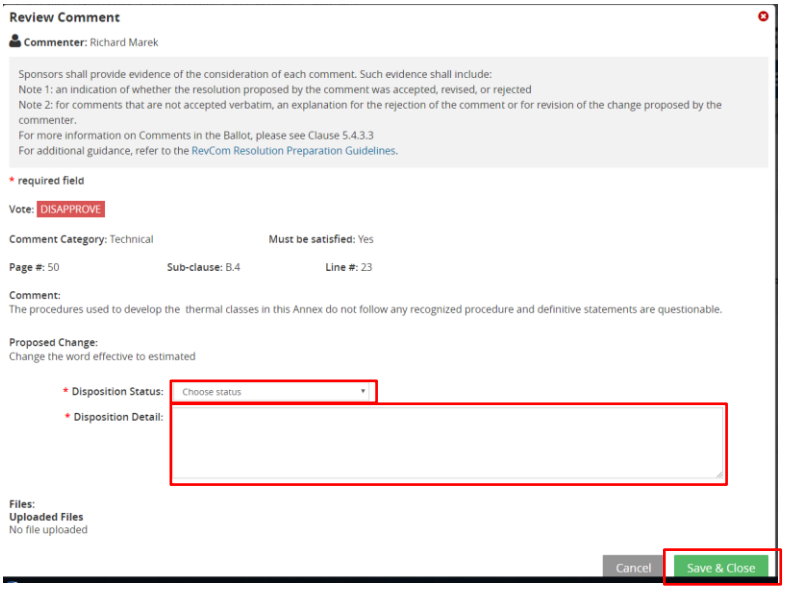
6. Locate the comment you want to respond to and click on the **comment number** or hover your mouse under the file column until the **Edit** icon appears and click on it.



7. Click on **Edit**.



8. Select the applicable disposition status from the **Disposition Status** drop-down menu.
9. Enter a description of the disposition in the **Disposition Detail** box (this is required if disposition status is **Revised** or **Rejected**).
10. Click **Save and Close**.



6.18.3 *Export Comments for Disposition*

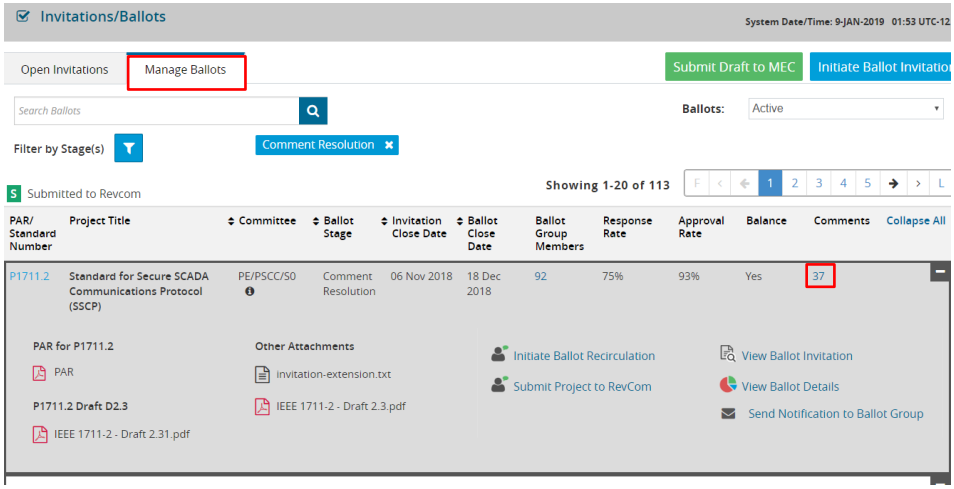
This option allows officers the ability to download comments and respond to them offline.

Applicable Users:

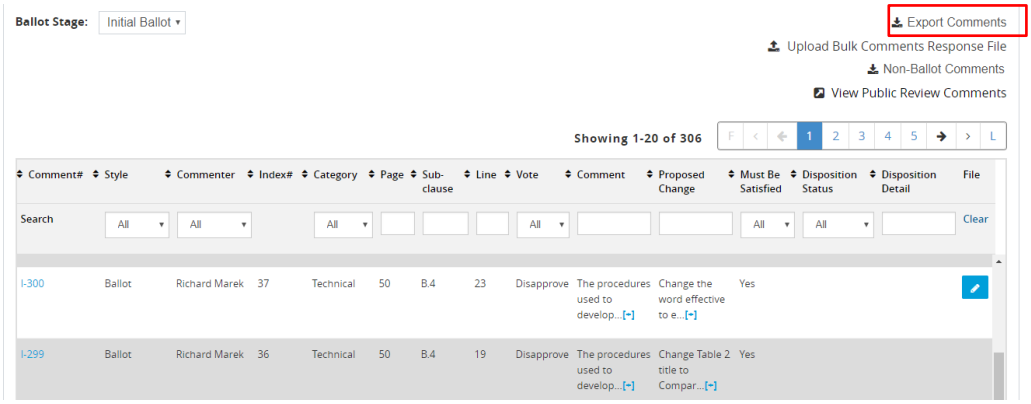
- Standards Committee Chair, Standard Representative, Working Group Chair/Co-Chair/Vice-Chair, Project Group Chair/Administrator

Instructions:

1. On the **myProject** Home Screen click **Menu**.
2. Click **Invitations/Ballots**.
3. Click **Manage Ballots**.
4. Use the **Search Ballots** box or the **Filter by Stage** function to locate the desired ballot.
5. Click on the number in the **Comments** column.



6. Click **Export Comments** and choose either Excel or CSV as the file type to download.



7. Edit the exported file using any spreadsheet editor and save the file in either .csv or .xls format.
   - Make sure to only use only the values listed on the download page (Accepted, Revised, Rejected) in the "Disposition Status" column.

6.18.4 *Upload Comment Responses*

This feature allows officers to upload comment responses that have been recorded offline.

Applicable Users:

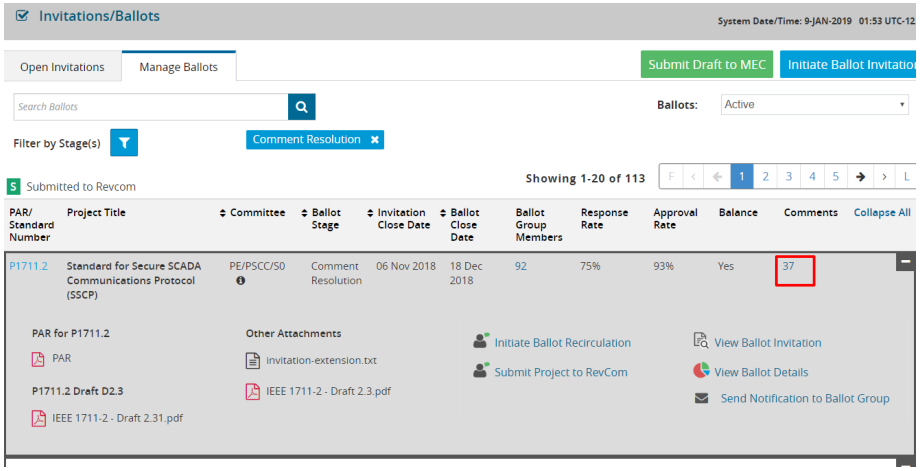
- Standards Committee Chair, Standard Representative, Working Group Chair/Co-Chair/Vice-Chair, Project Group Chair/Administrator

Notes:

- All comments must be responded to. The response should show that the comment was seriously considered.

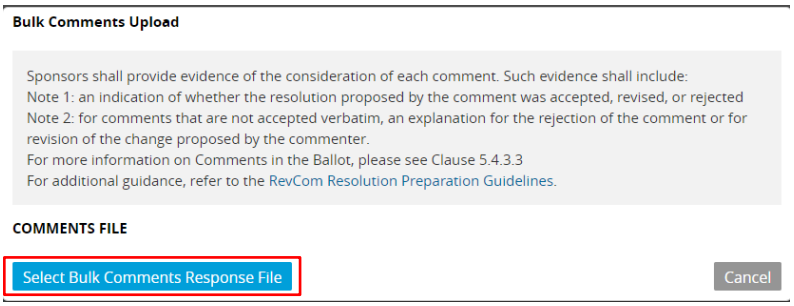
Instructions:

1. On the **myProject** Home Screen click **Menu**.
2. Click **Invitations/Ballots**.
3. Click **Manage Ballots**.
4. Use the **Search Ballots** box or the **Filter by Stage** function to locate the desired ballot.
5. Click on the number in the **Comments** column.

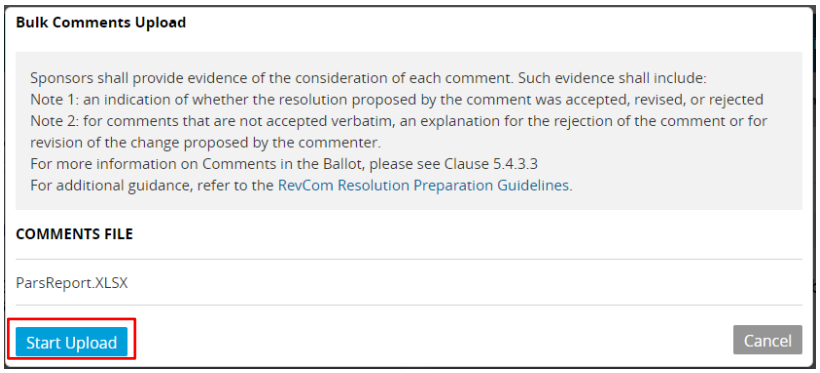


6. Click **Upload Bulk Comments Response File**.

7. Click **Select Bulk Comments Response File**.



8. Select your Excel or CSV file and click **Start Upload**. Click **OK** when complete.



9. View the comments in myProject and make sure your comments were uploaded correctly (See Sec 6.15 View Ballot Details).

6.19 Initiate Recirculation

A recirculation is typically needed when:

- Substantive changes were made since the last balloted draft (whether triggered by comments accompanied with YES or NO votes).
- Comments are received from IEEE SA editors marked “must be satisfied” (MBS).
- A recirculation resulted in negative votes with new comments within the scope of the recirculation.

On a recirculation, a vote shall be based only on the changed portions of the balloted document, clauses affected by the changes, or portions of the balloted document that are the subject of the unresolved negative votes.

Applicable Users:

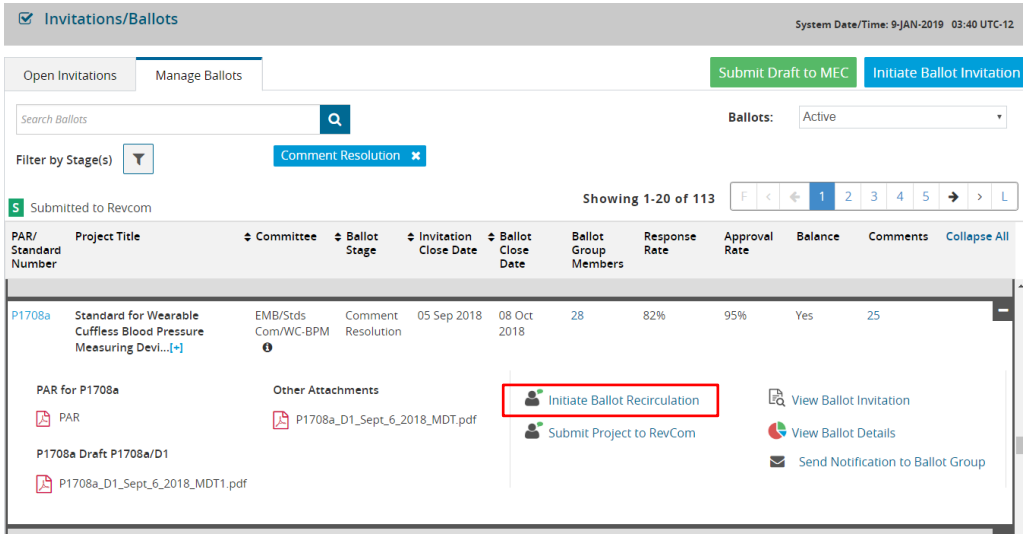
- Standards Committee Chair, Standard Representative, Working Group Chair/Co-Chair/Vice-Chair, Project Group Chair/Administrator

Notes:

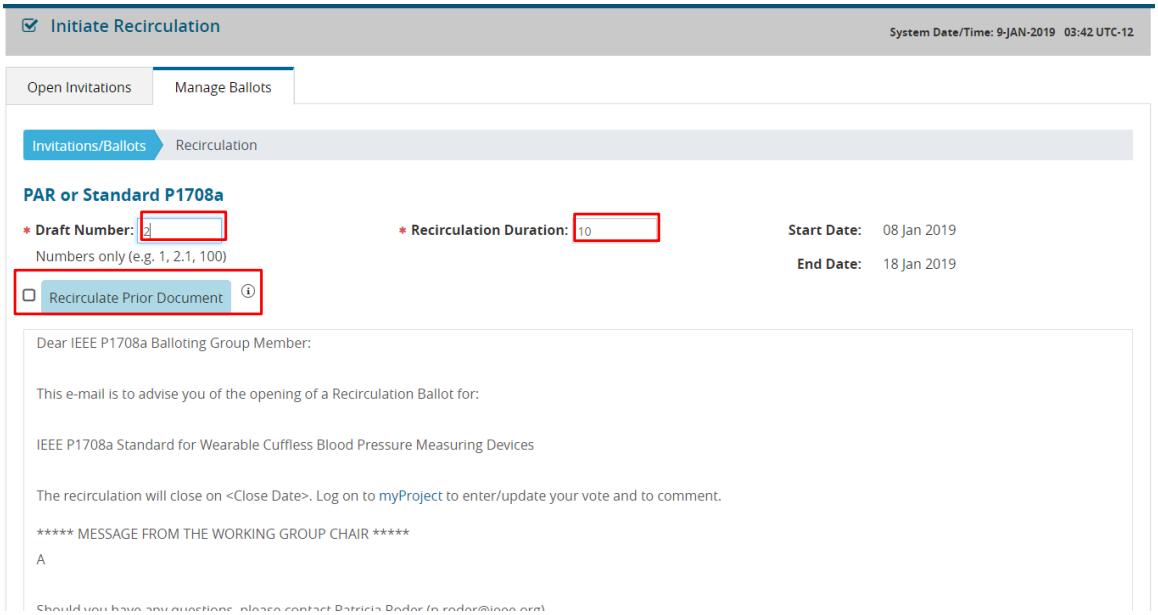
- A cover letter is required.
- The recirculation must be approved by the Program manager.
- A recirculation cannot be initiated until all comments have a disposition status (and detail if applicable) entered.

Instructions:

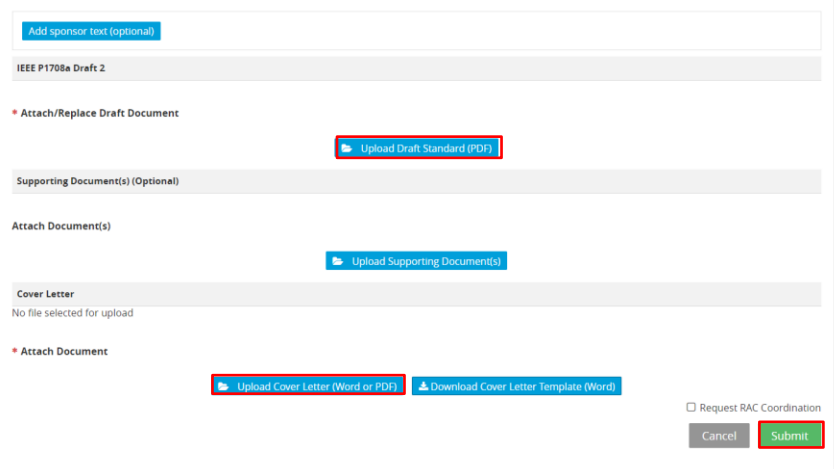
1. On the **myProject** Home Screen click **Menu**.
2. Click **Invitations/Ballots**.
3. Use the **Search Ballots** field or **Filter by Stage** option to locate the desired ballot.
4. Click **Initiate Ballot Recirculation**.



5. At the top of the Recirculation screen, enter a **Draft Number**. The **Recirculation Duration** defaults to 10 days but can be longer if desired. If no significant changes have been made to the most recent draft, click **Recirculate Prior Document**. This will re-use the draft number and file uploaded in the previous round of ballot.



6. Scroll down the page.
7. Complete the fields
   - Add Standards Committee text (optional)
   - Attach/Replace Draft Document (required)
   - Supporting Documents (optional)
   - Cover letter stating the reason for recirculation – click Upload Cover Letter (Word or PDF). Click the **Download Cover Letter Template** if needed.
   - Check the **Request RAC Coordination** box to notify the RAC admin of this ballot activity. If your PAR indicated registration activity related to this project, the box will be checked by default.
8. Click **Submit**. The Recirculation will be submitted to the Program Manager for Approval.



6.20 Vote and Comment on a Recirculation

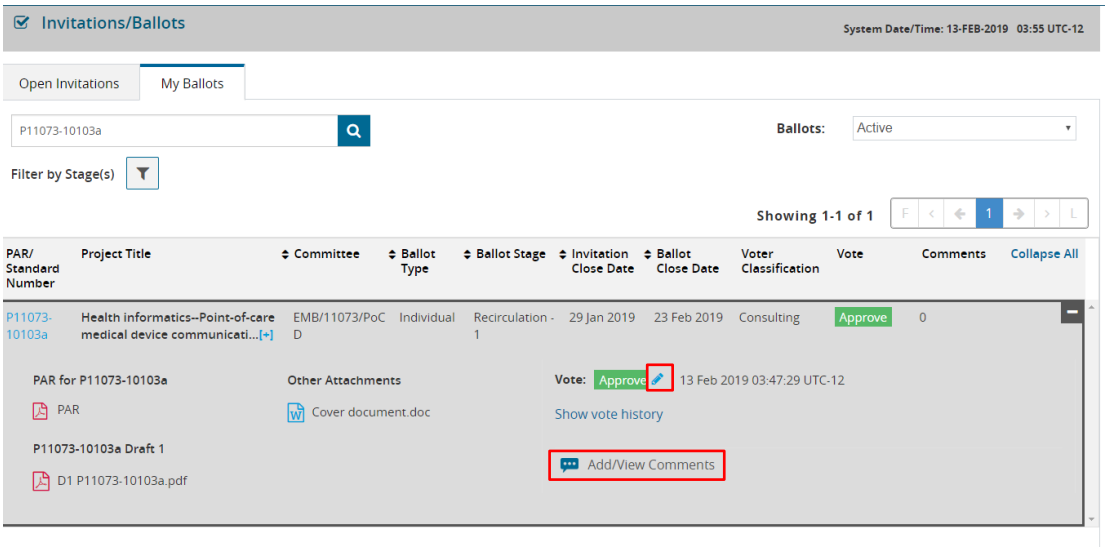
When a ballot has been recirculated, users will have the opportunity to review all previous comments and responses from the working group. They will then have the option of adding additional comments and changing their vote.

Applicable Users:

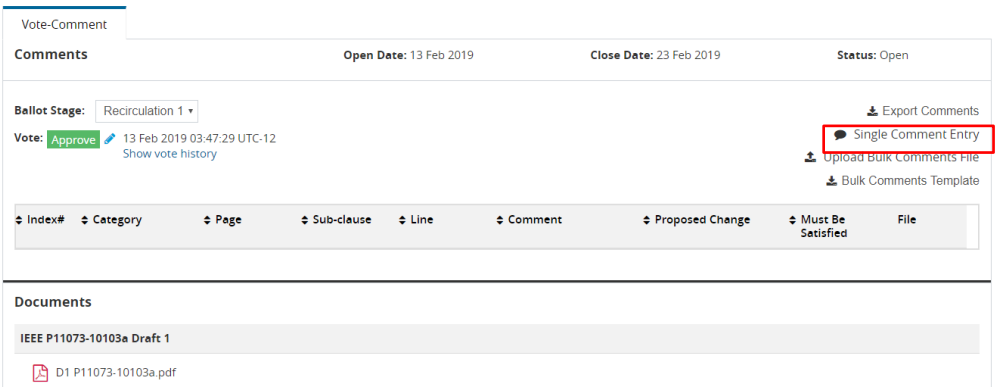
- myProject users currently enrolled in a ballot

Instructions:

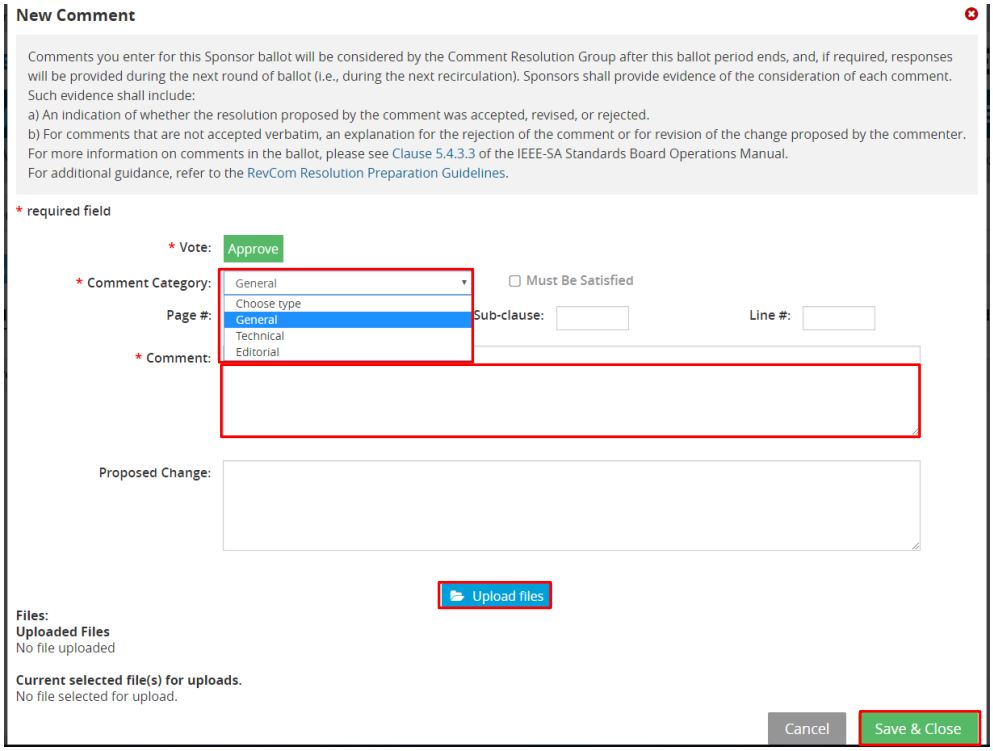
1. Click on the alert that there is a new ballot recirculation OR, on the **myProject** Home Screen click **Menu**.
2. Click **Invitations/Ballots**.
3. On the My Ballots tab, use the **Search Ballots** or **Filter by Stage** features to locate the recirculated ballot.
4. To change your vote, click on the **Edit icon** next to the Vote field.
5. To add a comment, click on **Add/View Comments**.



6. Click on **Single Comment Entry**.



7. On the New Comment screen, enter a **Comment Category** from the drop down list and type your comment in the **Comment** Field**.**
8. If desired, click **Upload Files** to upload a file pertaining to the comment.
9. Click **Save and Close**.



6.21 Review/Approve Ballot Recirculations

When an officer initiates a ballot recirculation, it does not automatically open. The Program manager must review and approve the recirculation request to initiate the recirculation.

Applicable Users:

- Program manager

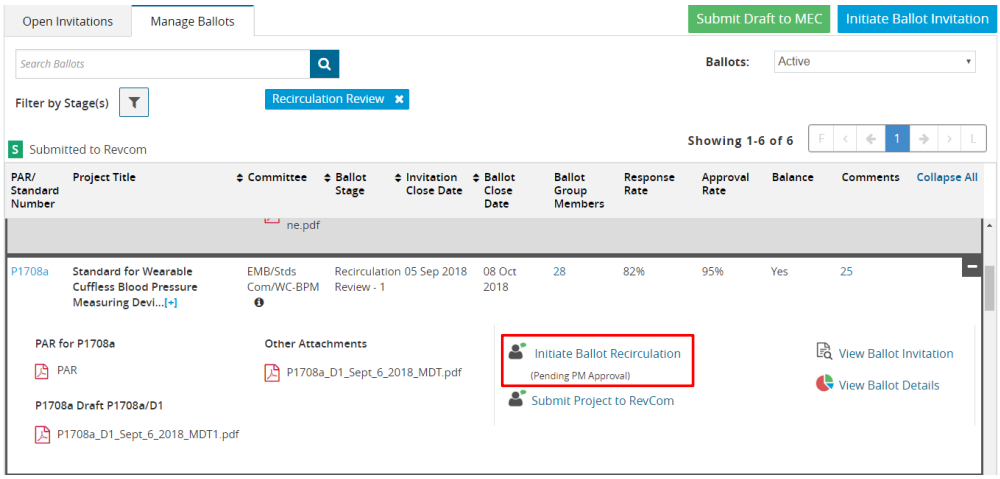
Notes:

- Any changes to the draft should be shown in a marked-up version. A clean version of the new draft is optional.
- Liaisons should check comment resolution statuses and details to make sure they are sufficient before approving the recirculation.

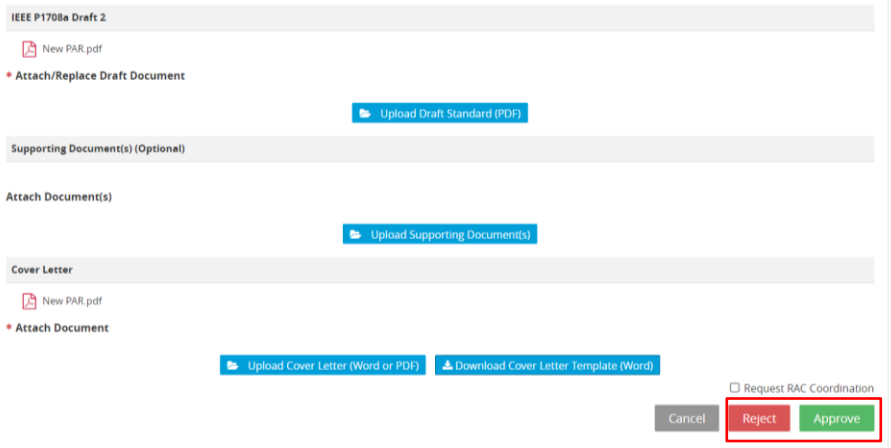
Instructions:

1. Click on the alert that there is a new ballot recirculation OR, on the **myProject** Home Screen click **Menu**.
2. Click Invitations/Ballots.
3. Click the **Manage Ballots** tab.
4. Use the **Search Ballots** or **Filter by Stage** function to locate the ballot.

5. Click **Initiate Ballot Recirculation (Pending PM Approval)**



2. Review the Ballot Recirculation and edit if necessary
3. Click **Reject** or **Approve**.



6.22 *Request a Ballot Reset or Termination*

Resetting a ballot will delete any votes and comments made and will return the ballot to the stage after invitation (pre-ballot). Terminating a ballot means that the ballot group has been disbanded. A request will be sent to Program Management staff, who will reset or terminate the ballot.

Applicable Users:

- Standards Committee Chair, Standard Representative, Working Group Chair /Vice-Chair,

Notes on Resetting a ballot

- You must supply a reason for resetting/terminating the ballot.
- When reset, the ballot must be opened again and a draft uploaded but the ballot group will be maintained.

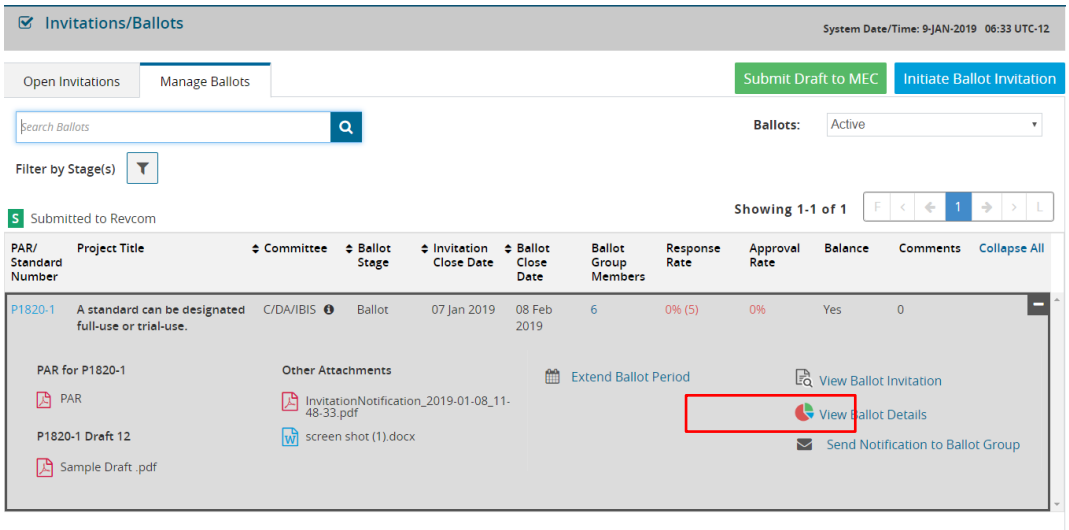
- When reset, even though the number under the column heading "Invitations Sent" will say "0" it does not mean that the ballot pool is not intact.
- A ballot may not be reset after a recirculation has begun.

Notes on Terminating a ballot

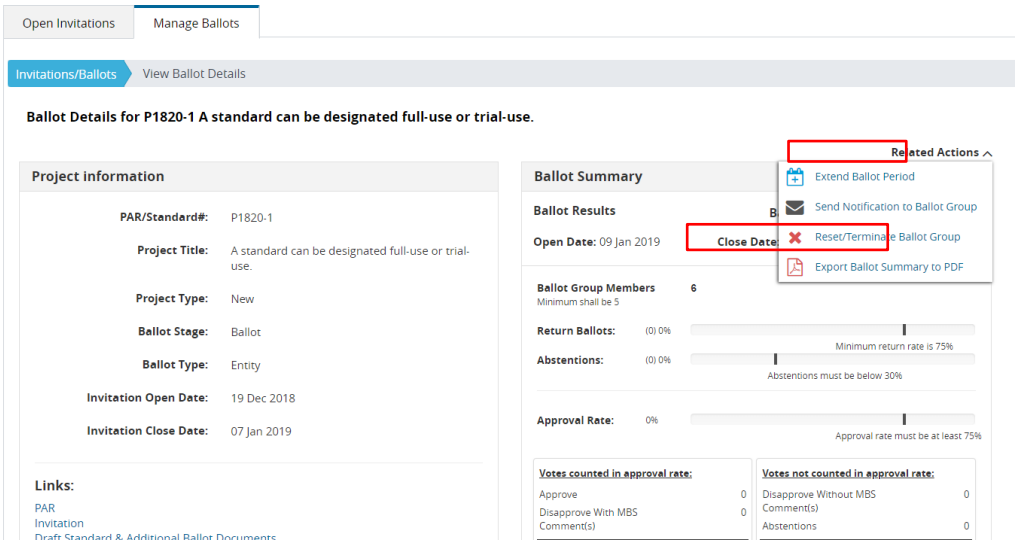
- When terminated, the ballot must re-start from the invitation stage and all individuals must re-enroll in the ballot at that time.
- You may terminate a ballot at any stage in the balloting process.

Instructions:

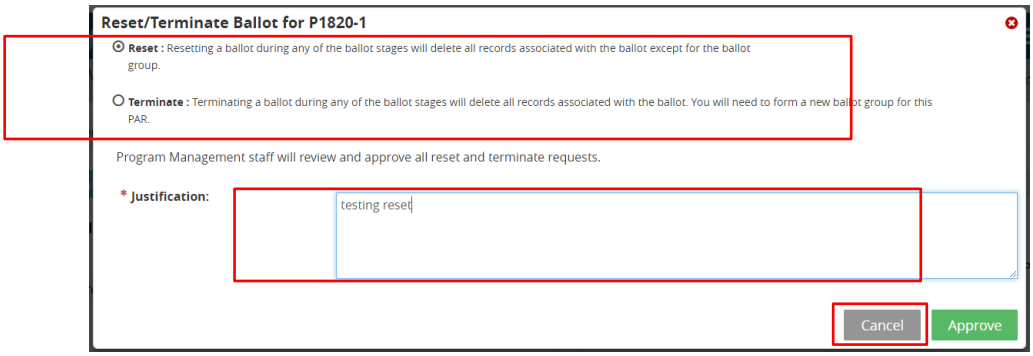
1. On the **myProject** Home Screen click **Menu**.
2. Click **Invitations/Ballots**.
3. Use the **Search Ballots** field or **Filter by Stage** option to locate the desired ballot.
4. Click on **View Ballot Details**.



5. Click on the **Related Actions** dropdown and click **Reset/Terminate Ballot Group.**



6. Click **Reset** or **Terminate** button and enter a justification in the **Justification** box.
7. Click **Approve.**
8. Click **Yes**. The Reset or Termination request will be sent to the Program Manager for approval.



6.23 Terminate/Reset a Ballot

Resetting a ballot will delete any votes and comments made and will return the ballot to at the stage after invitation. Terminating a ballot means that the ballot group has been disbanded.

Applicable users:

- Program Management Manager

Notes on Resetting a Ballot:

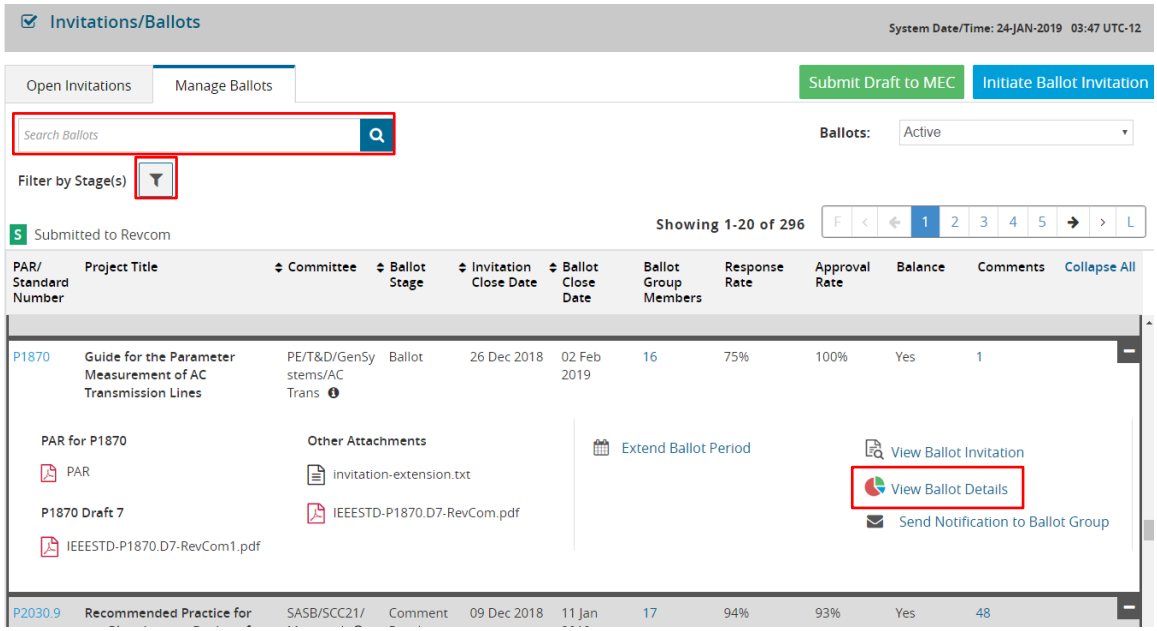
- You must supply a reason for resetting/terminating the ballot. This reason will be included in a message to the balloting group.
- When reset, the ballot must be opened again and a draft uploaded but the ballot group will be maintained.
- A ballot may not be reset after a recirculation has begun.

Notes on Terminating a Ballot:

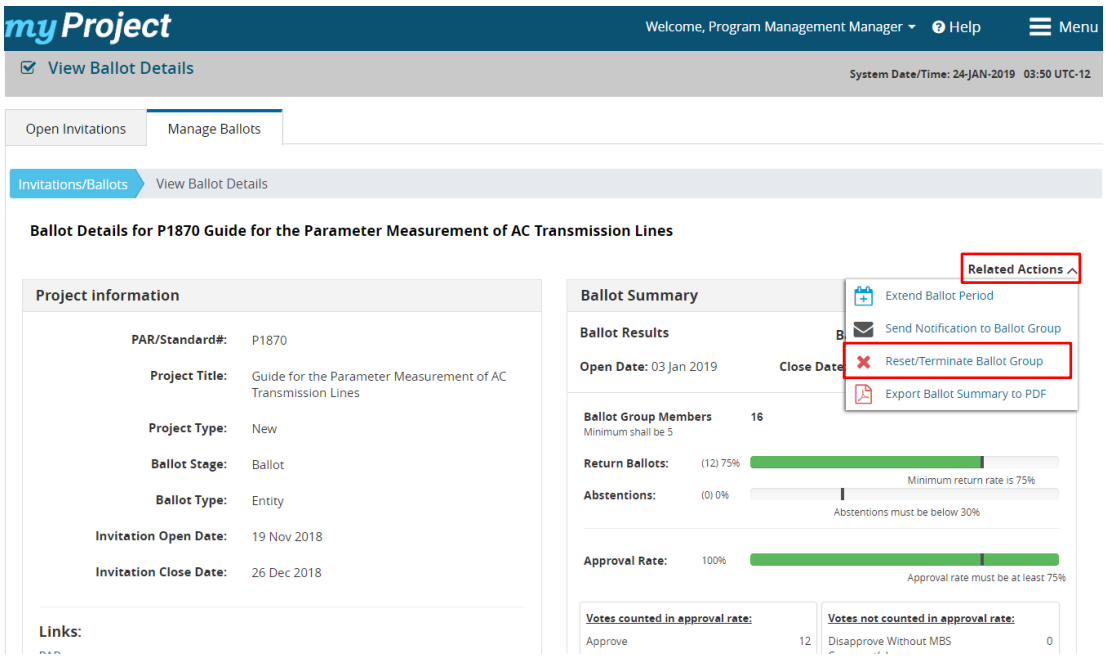
- When terminated, the ballot must re-start from the invitation stage and all individuals must re-enroll in the ballot at that time.
- You may terminate a ballot at any stage in the balloting process.

Instructions:

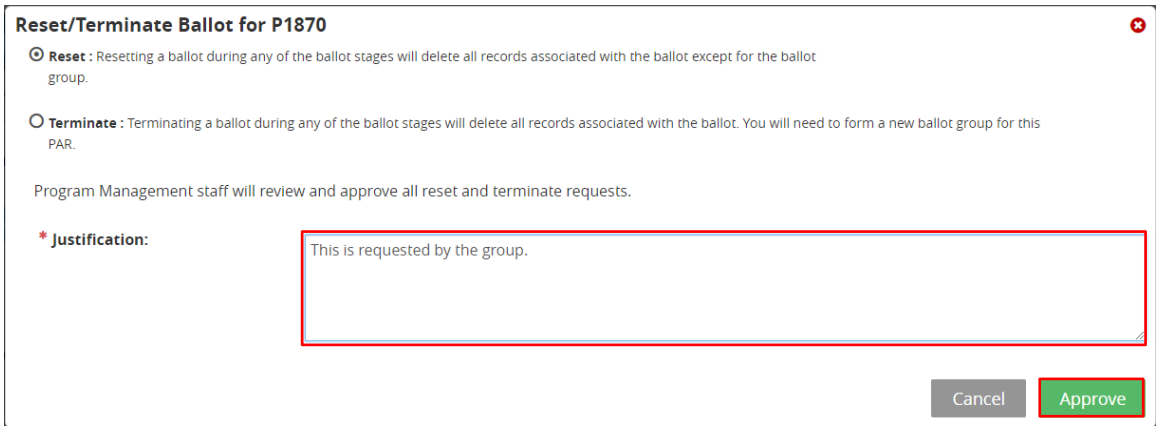
1. On the **myProject** Home Screen, click **Menu**.
2. Click **Invitations/Ballots**.
3. Use the **Search Ballots** box or **Filter by State** to locate the ballot you wish to reset or terminate.
4. Click **View Ballot Details.**



5. On the View Ballot Details screen, click **Related Actions**.
6. Click **Reset/Terminate Ballot Group**.



7. Choose either **Reset** or **Terminate**.
8. Enter a justification for the action in the **Justification** box.
9. Click **Approve.** Click **Yes** to confirm.



7 AudCom/NesCom/RevCom

7.1 AudCom

7.1.1 Create an AudCom Meeting

The Audit Committee's main role is to review and approve Standards Committee Policies and Procedures documents. When a Standards Committee P&P is submitted to AudCom, it will automatically be added to the next available meeting agenda.

Applicable Users:

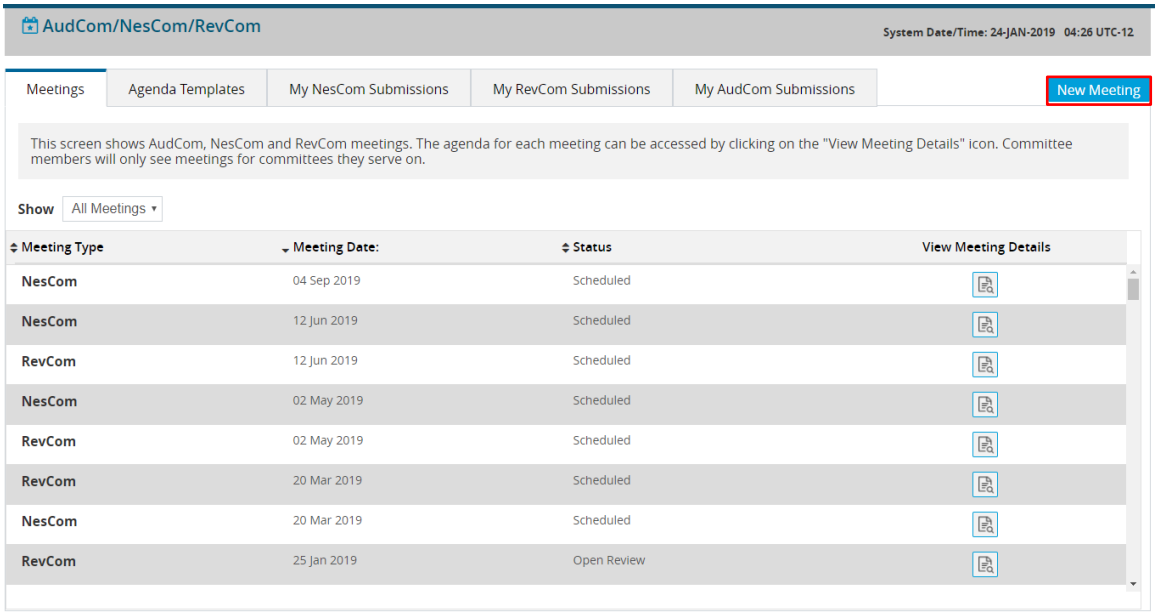
- AudCom Administrator

Notes:

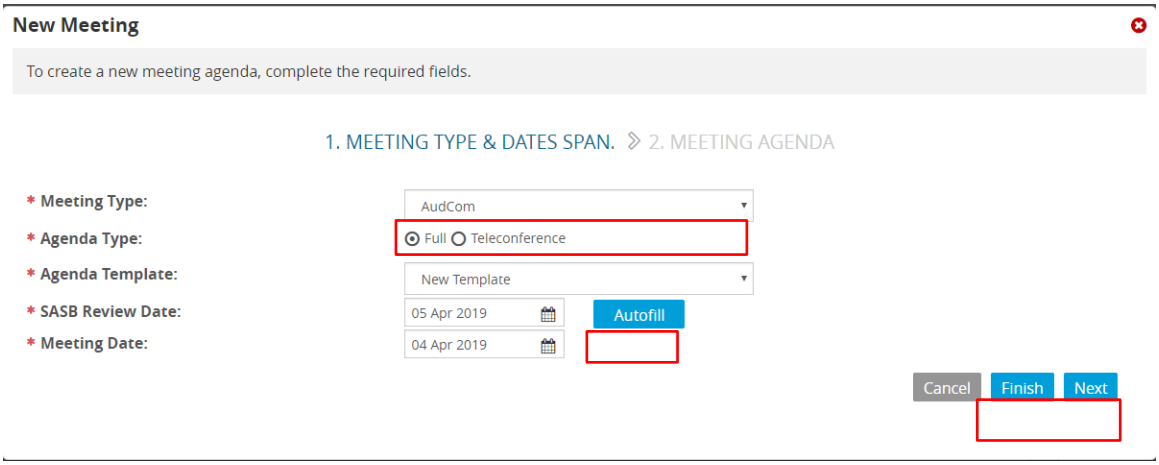
- Meeting dates will be set based on NesCom dates entered by the NesCom Administrator.
- An agenda must be created in order for Standards Committee P&Ps to be added to it.

Instructions:

1. On the **myProject** Home Screen, click **Menu**.
2. Click Audcom/NesCom/RevCom.
3. Click **New Meeting**.



4. From the **Meeting Type** drop down, choose **AudCom**.
5. Select an **Agenda Type.**
6. Enter the **SASB Review Date** and click **Autofill**.
7. Click **Finish** to create the meeting or click **Next** to proceed directly to creating the meeting agenda.



7.1.2 *Build and Manage an AudCom Agenda*

Applicable Users:

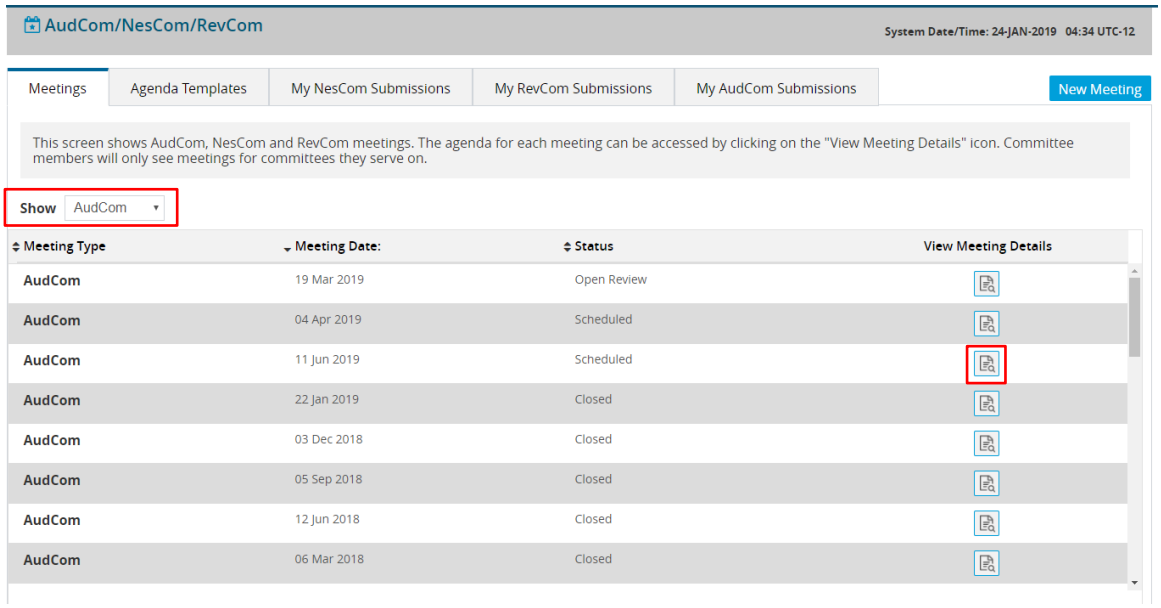
- AudCom Administrator

Notes:

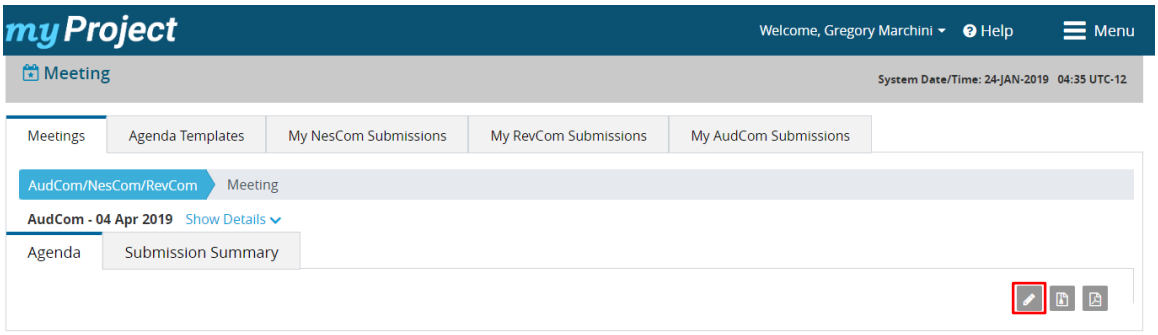
- Meeting dates will be set based on NesCom dates entered by the NesCom Administrator.
- An agenda must be created in order for Standards Committee P&Ps to be added to it.

Instructions:

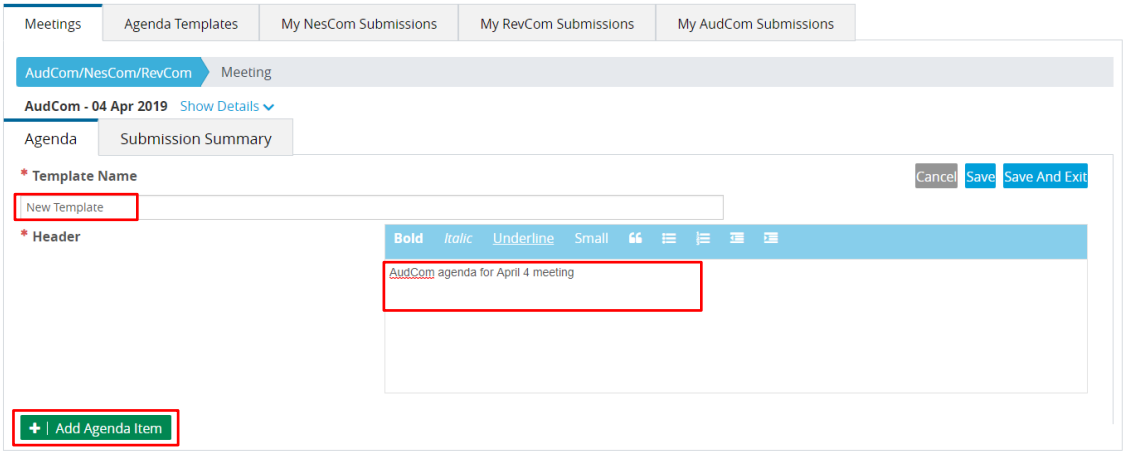
1. On the **myProject** Home Screen, click **Menu**.
2. Click **Audcom/NesCom/RevCom**.
3. Use the **Show** dropdown to locate the AudCom meeting for which you want to create or edit an agenda.
4. Click **View Meeting Details**.



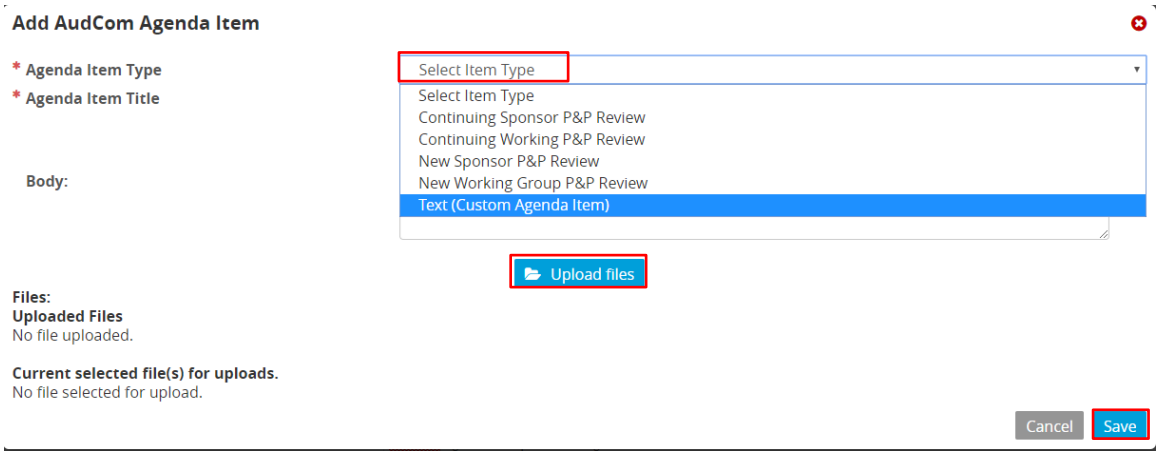
5. Click the **Edit Agenda** icon.



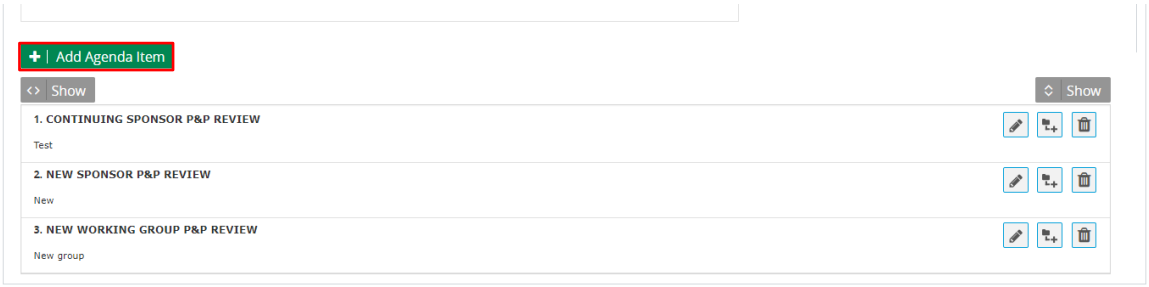
6. Enter a **template name** and a **header** for the agenda.
7. Click **Add Agenda Item**.



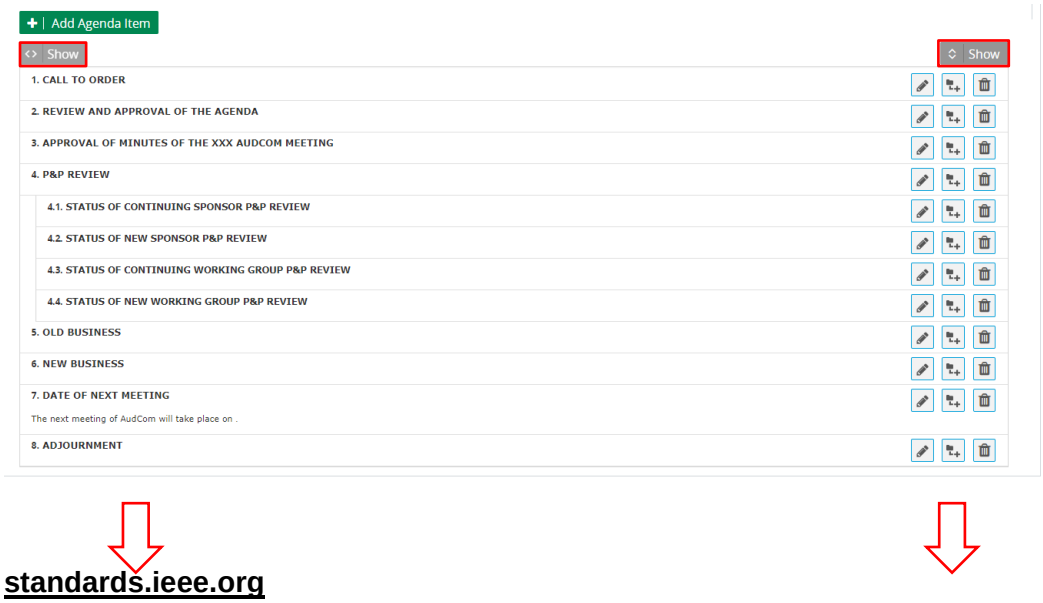
8. Select an **Agenda Item Type** from the drop down.
9. Add an **Agenda Item Title**.
10. Upload files if desired.
11. Click **Save**.

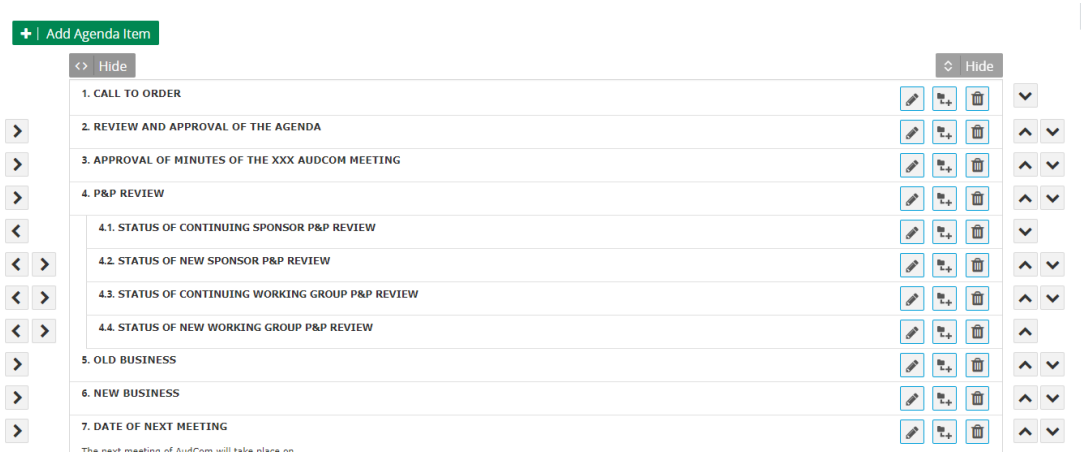


12. Continue adding agenda items as needed.

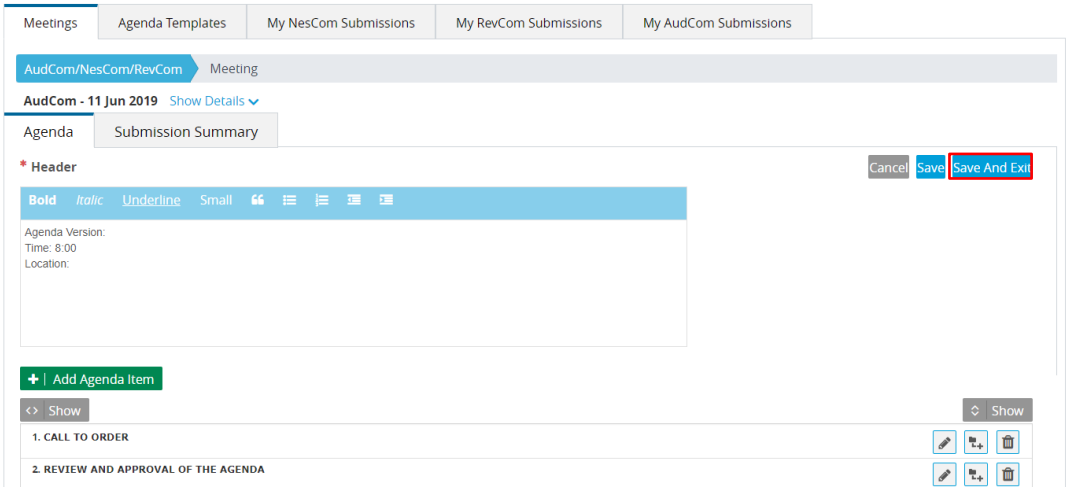


13. Re-order or demote/promote sub-items on the agenda by clicking on the **show/hide** buttons at the top of the agenda item list. Use the **right/left** or **up/down** arrows to move the agenda items.





14. When done, click **Save and Exit**.



7.2 NesCom

7.2.1 *Create a Nescom Meeting*

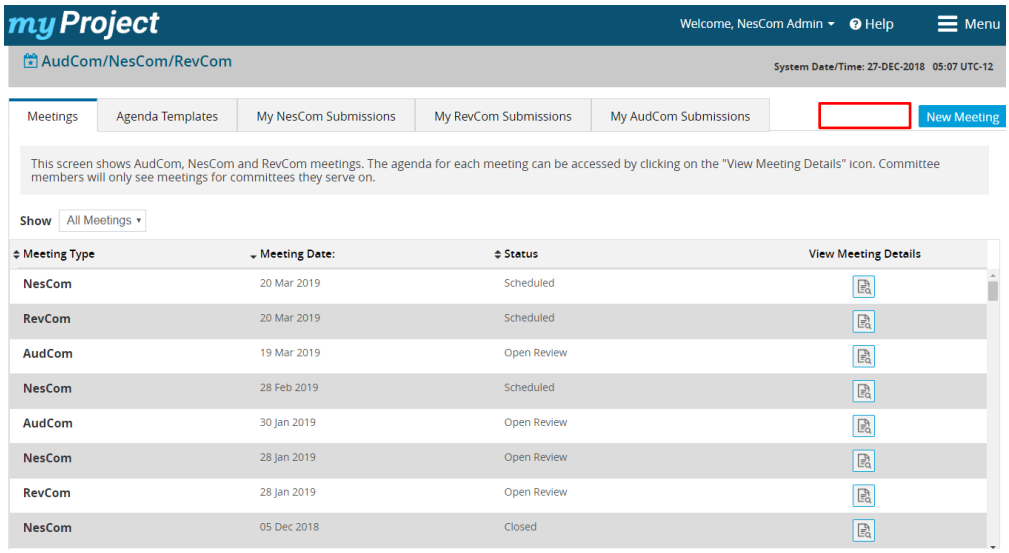
In order for PARs to be added to a NesCom agenda, the Nescom administrator must first add the meeting dates to myProject and create agendas for those meetings.

Applicable Users:

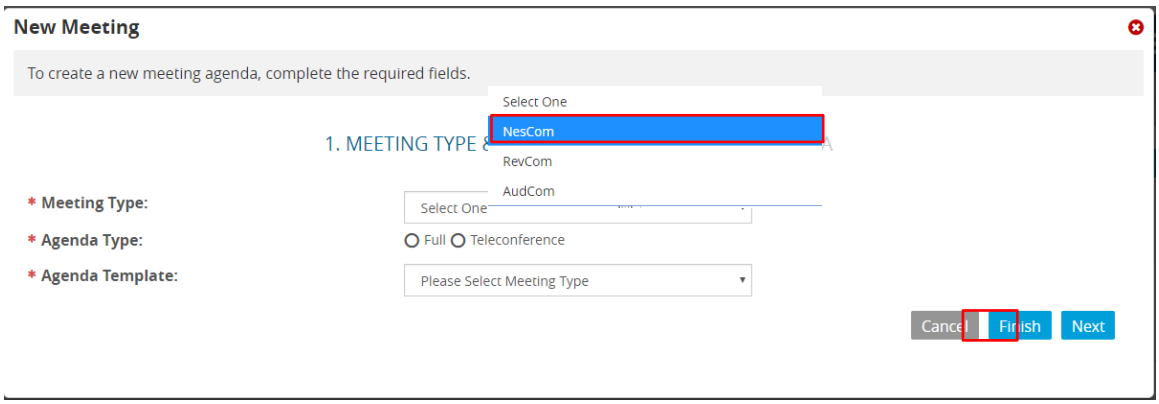
- NesCom Administrator

Instructions:

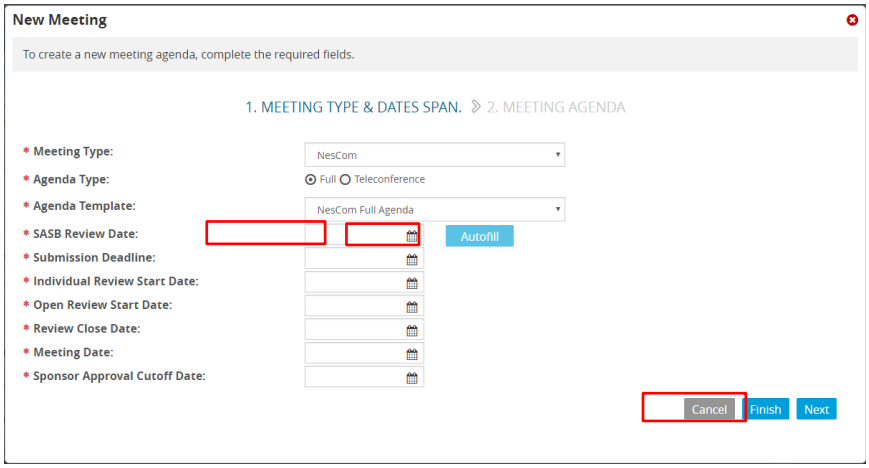
1. On the **myProject** Home Screen click **Menu**.
2. Click **AudCom/NesCom/RevCom**. The Meetings tab will appear.

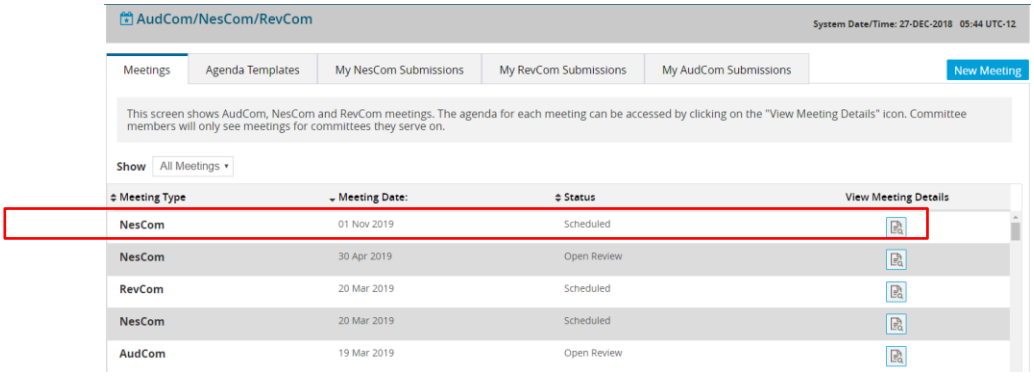


3. Click on **New Meeting**.
4. From the Meeting Type drop down, choose **NesCom**.
5. Click **Next**.



6. Select an **Agenda Template** for the meeting.
7. Enter the **SASB Review date**.
8. Click **Autofill** to automatically generate dates for all fields. You can manually edit dates if required.
9. Click **Finish** to save the meeting without creating the agenda. Click **Next** to create a meeting agenda. (See **7.2.3 Build and Manage a NesCom Agenda** for instructions). The newly scheduled meeting will appear on the Meetings tab.





7.2.2 *Review PAR Draft/Add a PAR Number*

When a PAR is submitted without a number, the NesCom Administrator must enter a PAR number and approve the submission.

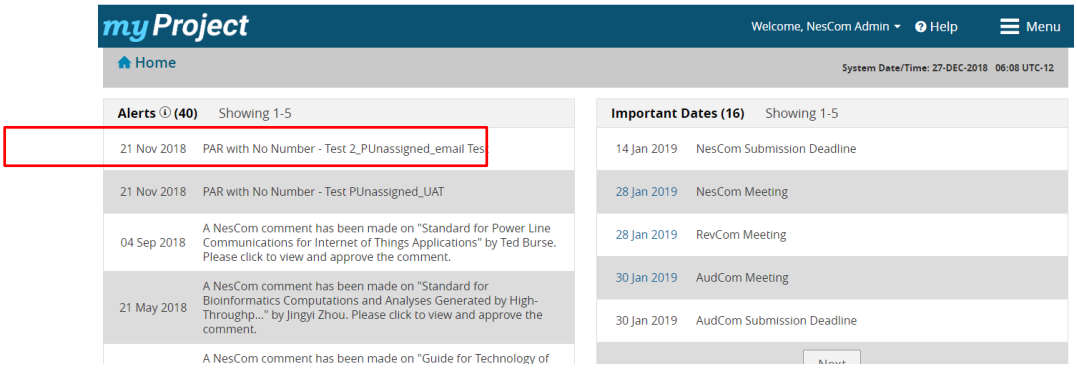
Applicable Users:

- NesCom Administrator

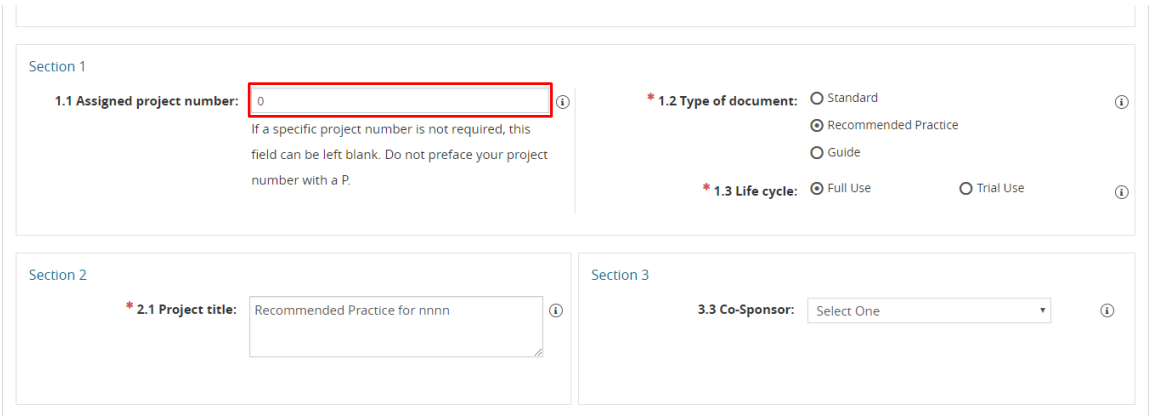
Instructions:

The NesCom Admin will receive an email and get an alert in the system to let them know that a PAR has been submitted for approval without a number. Admins can also see pending PARs by accessing the **myProject menu** and choosing **AudCom/NesCom/RevCom** and viewing the **My NesCom Submissions tab** and searching for Unassigned project numbers**.**

1. On the **myProject** Home page, click on the Alert indicating a PAR is waiting for your approval or access it via the other options listed above.



2. Scroll to Section 1 on the form and enter the PAR number in the **Assigned project number** field.
3. Click **Save and Exit**.



7.2.3 *Edit/Manage a Nescom Agenda*

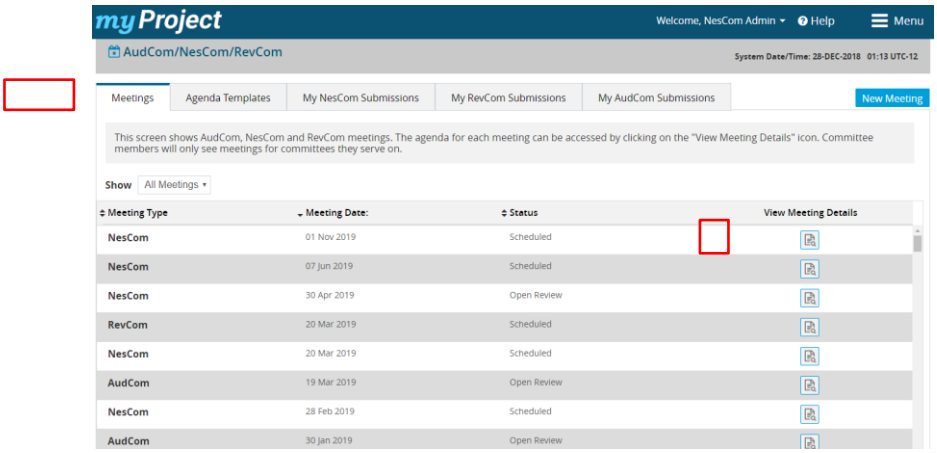
After a meeting is added, you will need to build a meeting agenda. PAR withdrawals, modified PARs, new PARs and extension requests will automatically be added to the next meeting agenda, but the agenda must be created first. When a meeting is created from a template, the agenda will automatically be generated.

Applicable Users:

- NesCom Administrator

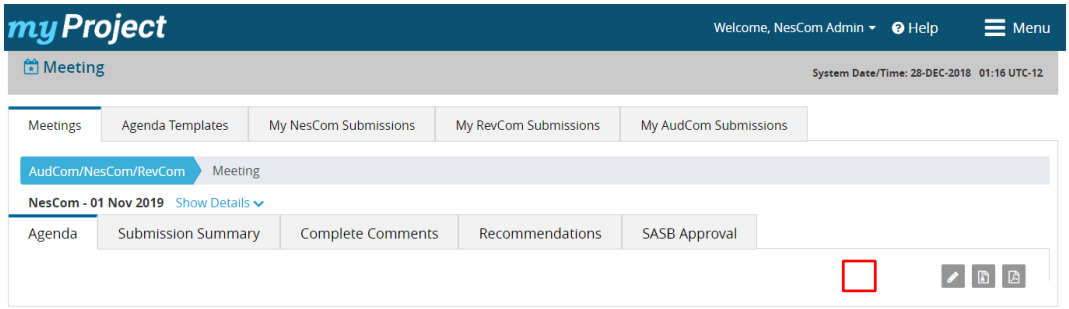
Instructions:

1. On the **myProject** Home Screen, click **Menu**.
2. Click **AudCom/NesCom/RevCom**. The Meetings tab will appear.

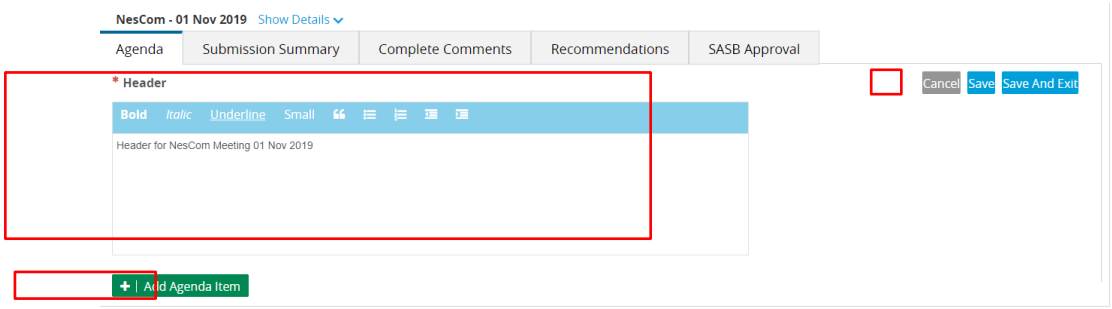


3. Locate the meeting you want to create an agenda for and click on the **View Meeting Details** icon.

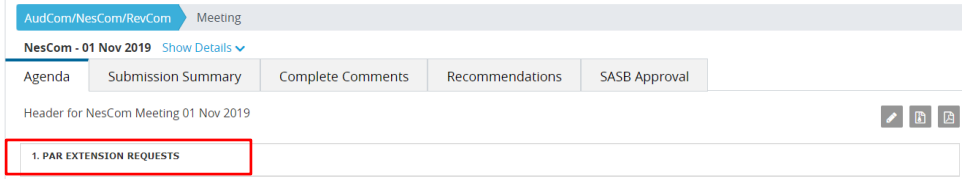
4. Click on the **Edit Agenda** icon.



5. In the **Header** box, type a Header for the agenda.
6. Click **Save**.
7. Click **Add Agenda Item**. The Add NesCom Agenda Item window will appear.

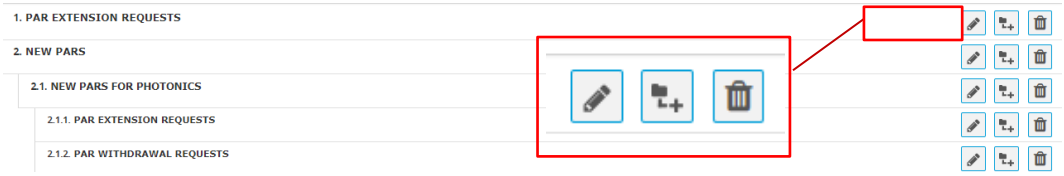


8. From the Agenda Item Type drop down, choose an **Agenda Item Type**. To enter an item not on the list, chose **Text(Custom Agenda Item)**. The Agenda Item Title will automatically populate with the agenda item type but it can be edited.
9. Enter **Body** text if desired.
10. If files are to be attached to the agenda, click **Upload Files.**
11. Click **Save**. The agenda item will be saved to the agenda.



12. Repeat this process to add more items to the agenda.

13. Once the item is added, it can be edited, deleted, or a sub-item can be added.



14. Re-order or demote/promote sub-items on the agenda by clicking on the **show/hide** buttons at the top of the agenda item list. Use the **right/left** or **up/down** arrows to move the agenda items.

15. When you've completed the agenda, click **Save and Exit**.

7.2.4 *Commenting and logging a preliminary vote on a PAR*

Once the PAR is submitted, there will be a review period where NesCom members can make comments and log a preliminary vote on the PAR.

Applicable Users:

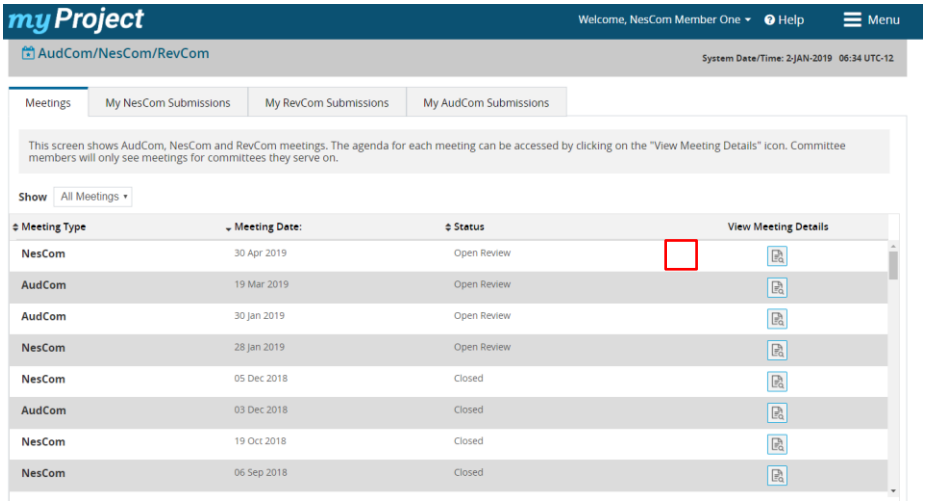
- NesCom Members

Notes:

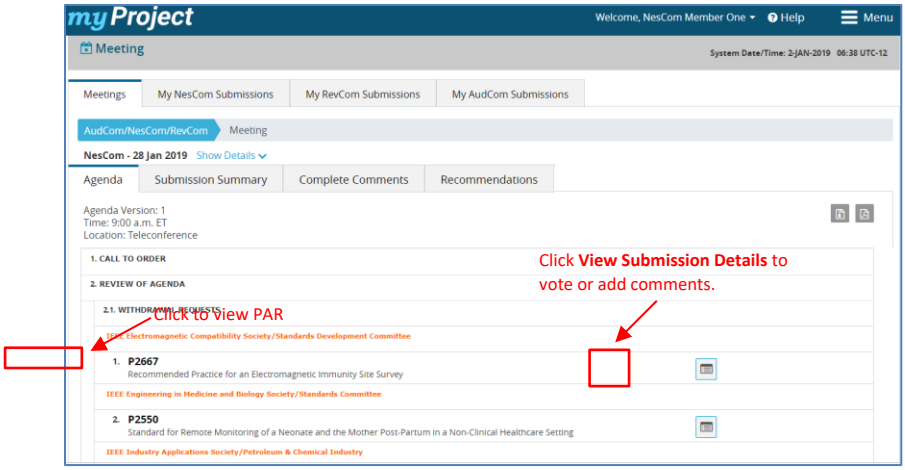
- The NesCom Administrator must approve all comments before they are visible to the submitter.

Instructions:

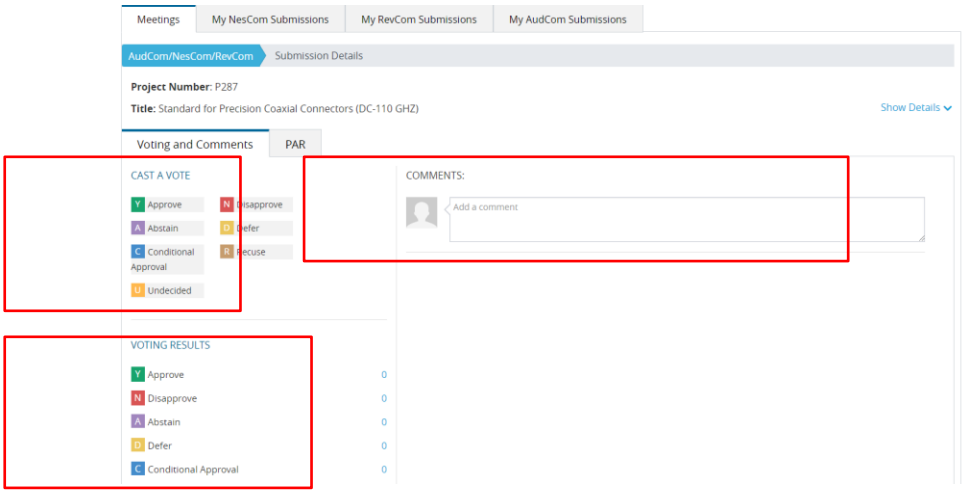
1. On the **myProject** Home Screen, select **Menu.**
2. Click **AudCom/NesCom/RevCom**. A list of past and upcoming meetings and the meeting status will appear.
3. To view the agenda and comment or vote on PARs, click the **View Meeting Details** icon next to a meeting that is in individual or open review status.



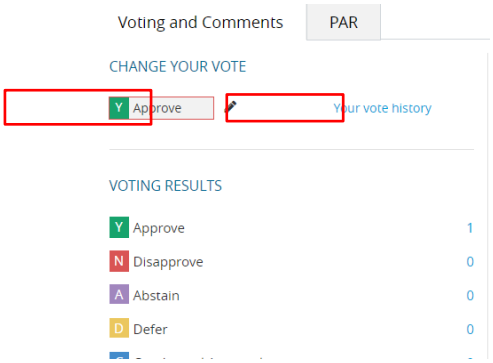
4. Now you will be able to view the meeting agenda. To view the PAR, click on the **PAR** number.
5. To vote or add comments, click the **View Submission Details** Icon.



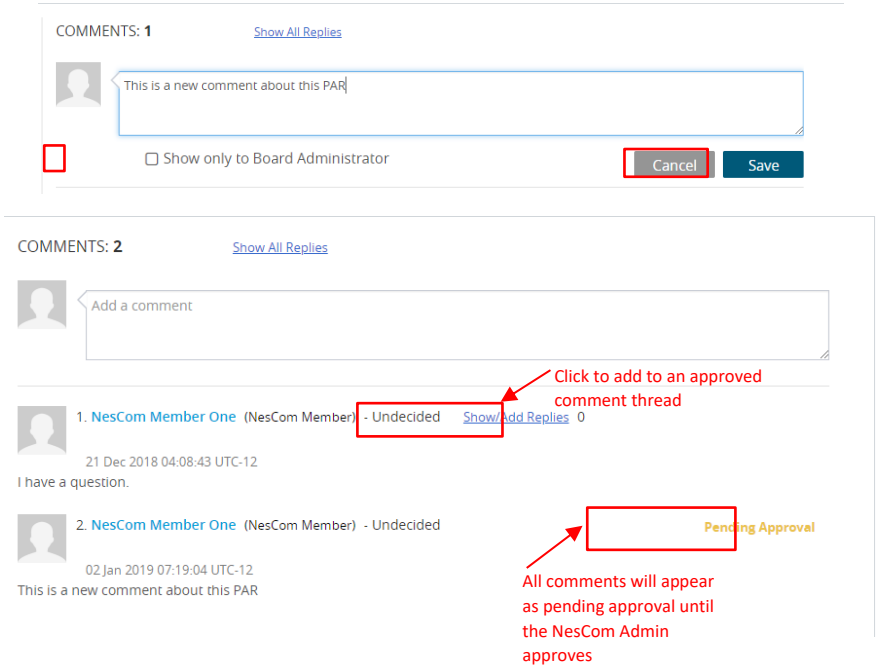
6. On the next screen, you will be able to cast a preliminary vote, add a new comment, or add to the dialog on an existing comment.



a. To cast a vote, simply choose your vote from the list in the **Cast A Vote** section of the screen. Your vote will appear in the Voting Results section and the vote will be saved in your vote history. You can change your vote by clicking in the **Change Your Vote** box.



b. To add a new comment, click in the **Add a comment** box, type your comment and click **Save**. If desired, click the *Show only to Board Administrator* box. Your comment will appear as Pending Approval and a notification will be sent to the NesCom Administrator. Once the comment is approved, users can add a reply to the comment by clicking **Show/Add Replies**.



7.2.5 *Approving a Comment about a PAR*

The NesCom Administrator must approve all comments about a PAR before the submitter and other committee members can add comments.

Applicable Users:

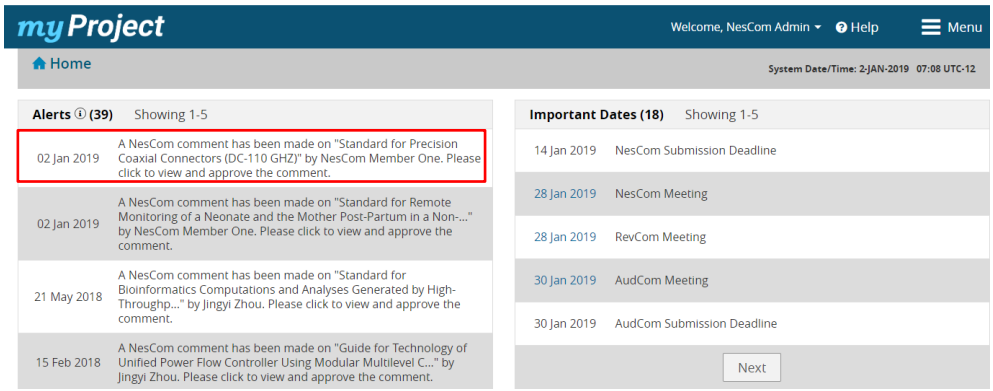
- NesCom Admin

Notes:

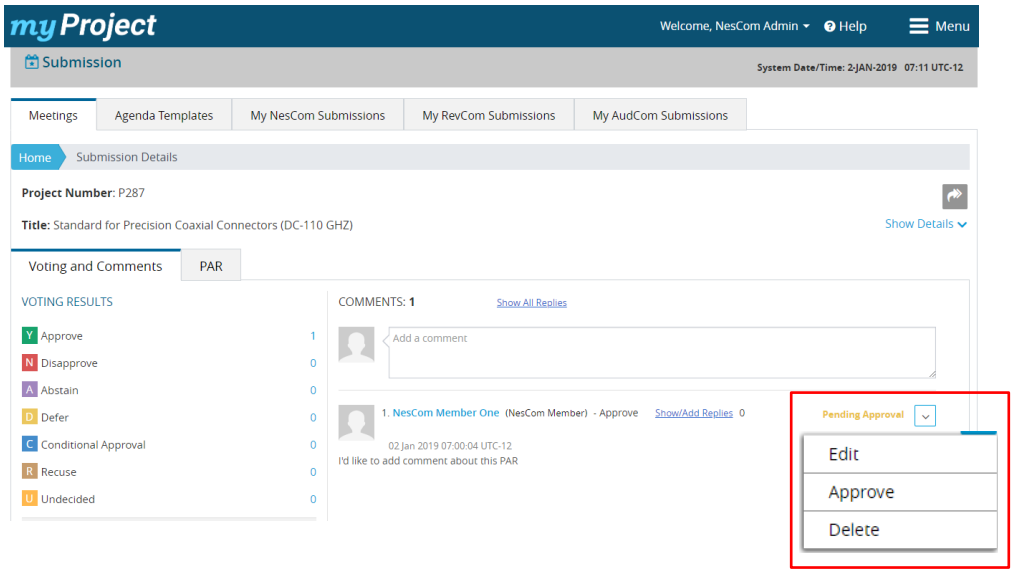
- The NesCom Administrator must approve all comments before they are visible to the submitter.

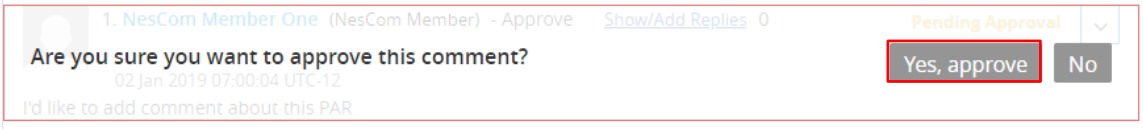
Instructions:

1. On the myProject Home page, click on the alert that indicates a comment has been made about a PAR.



2. On the Voting and Comments tab click the **Pending Approval** drop down and click **Approve**. You also have the option to Edit or Delete the comment.
3. Click **Yes** to confirm.





7.2.6 *Respond to NesCom Comments About a PAR*

Once the PAR is submitted, there will be a review period when NesCom members can comment on the PAR. The comments will be moderated by the NesCom administrator, who is also responsible for making any changes to the PAR before the NesCom meeting.

Applicable Users:

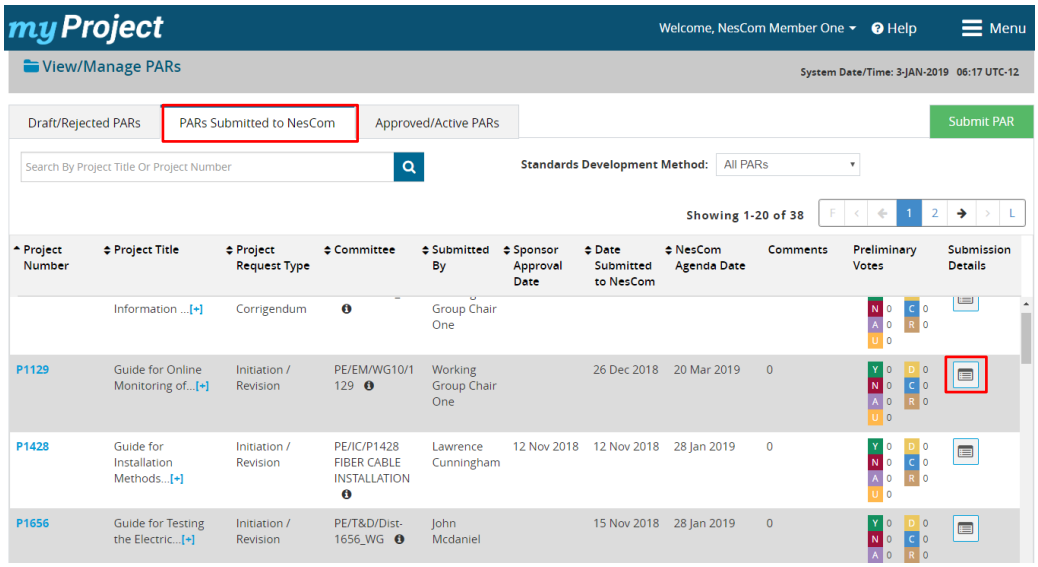
- Par Submitter, Standards Committee Chair, Standard Representative, Working Group Chair/Vice-Chair/Co-Chair

Notes:

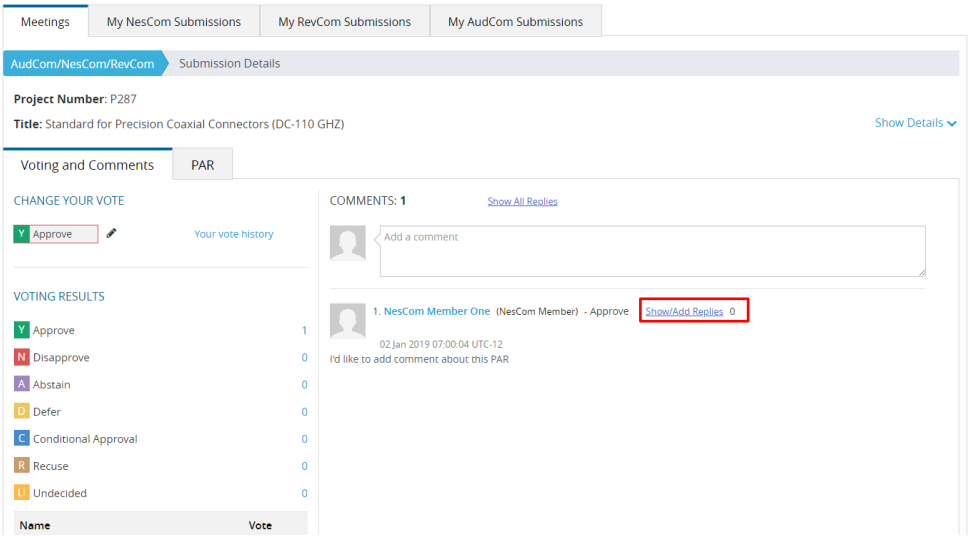
- Failure to respond to a comment may result in deferral of the PAR to the next NesCom agenda.
- Only the NesCom administrator can make changes to the PAR at this stage. Your agreement with requested changes or submission of new wording can be included in your dialog response. If the changes are extensive, respond to the comment and email your changes to the NesCom administrator (nescom-admin@ieee.org)

Instructions:

1. On the **myProject** Home page, click **Menu**.
2. Click **View/Manage PARS**.
3. Click on the **PARs Submitted to NesCom** tab.



4. Use the **search** bar or sort the columns to locate the PAR.
5. Click the **Submission Details** icon.



6. Locate the comment you wish to respond to and click **Show/Add Replies** to enter your reply. You can use this feature to continue a dialog with NesCom members and the NesCom administrator.

7.2.7 *Review NesCom Submissions*

Committee members will be able to review any submissions for committees they serve on using the AudCom/NesCom/RevCom menu. The *Agenda, Submissions Summary, Complete Comments and Recommendations tabs* provide multiple ways to view and download the information.

Applicable Users:

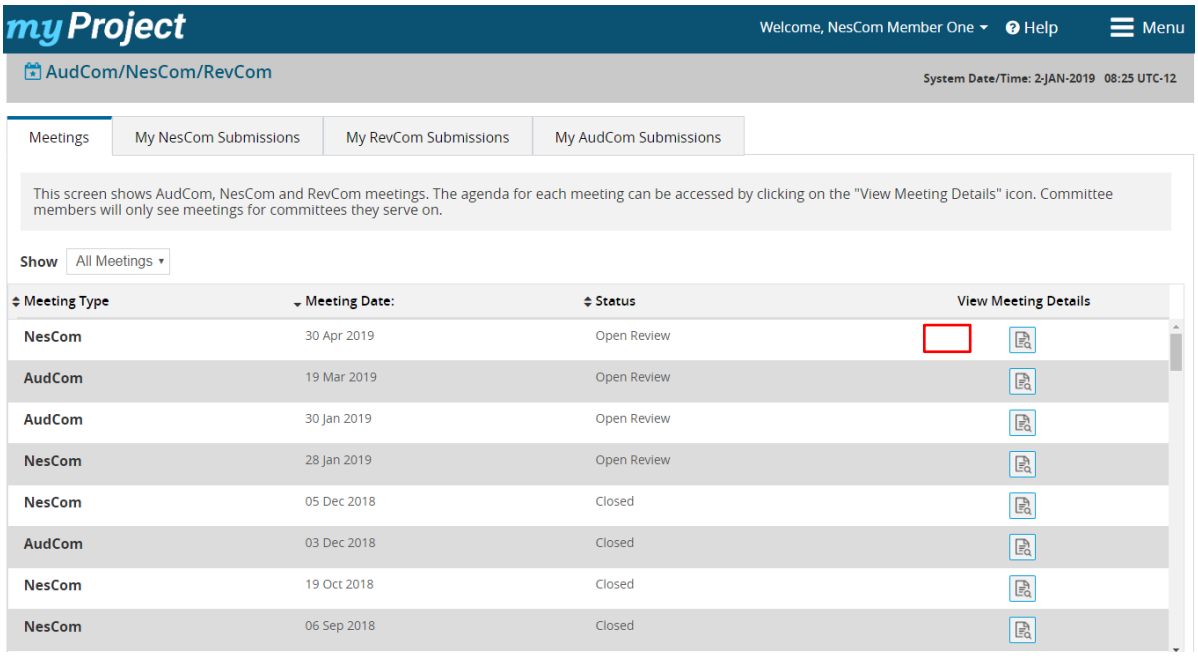
- Par Submitter, Standards Committee Chair, Standard Representative, Working Group Chair/Vice-Chair/Co-Chair

Notes:

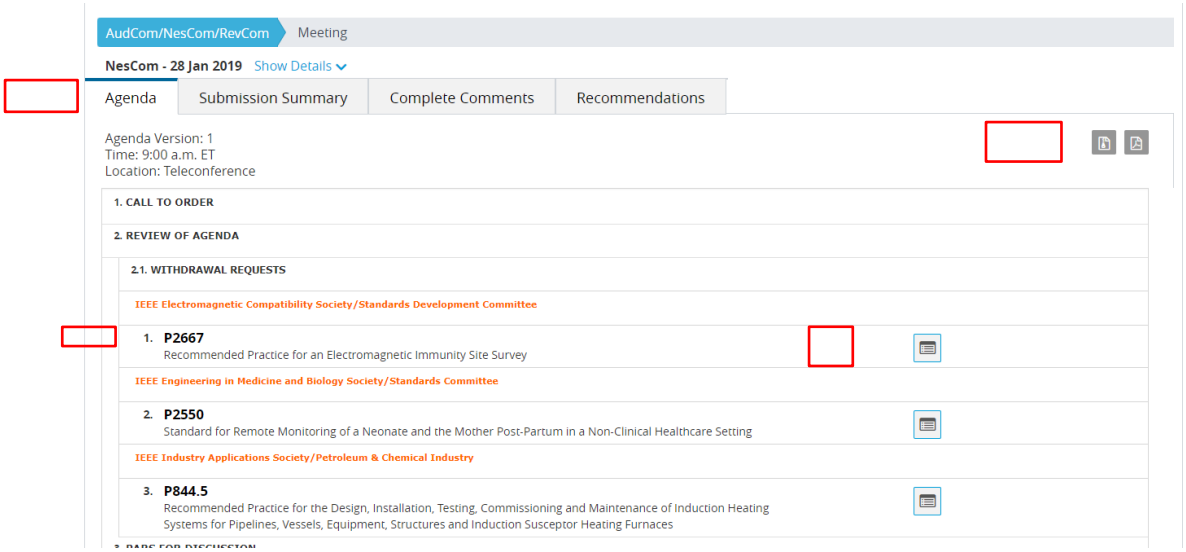
- The NesCom Administrator must approve all comments before they are visible to the submitter.

Instructions:

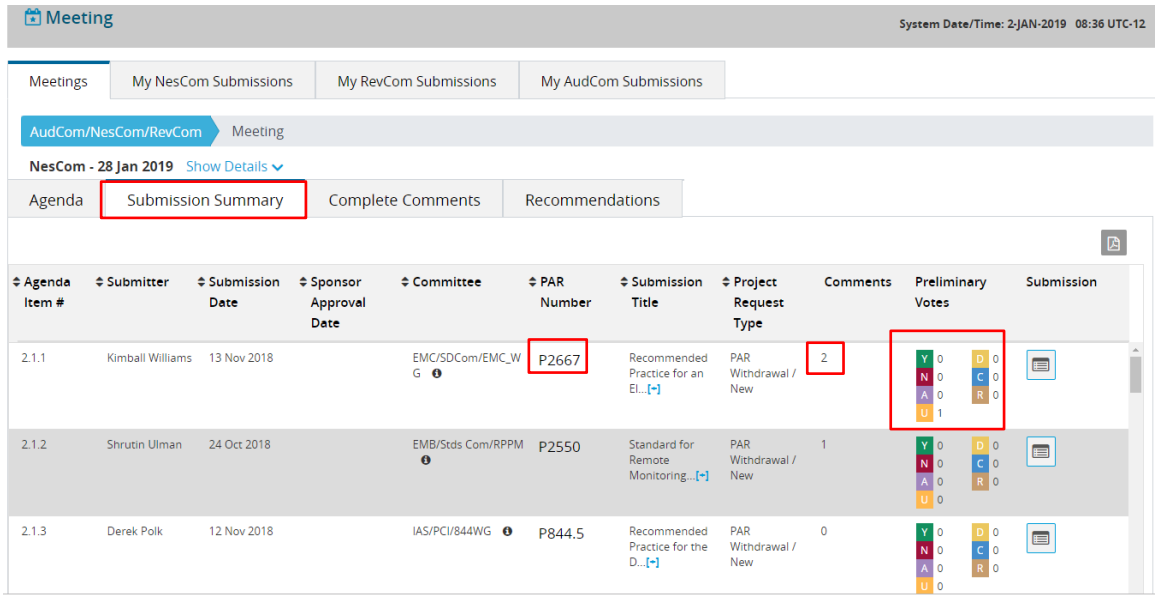
1. On the myProject Home page, select **Menu**.
2. Click **AudCom/NesCom/RevCom**. The Meetings tab will display all past and current meetings. Committee members will only see meetings for committees they serve on.



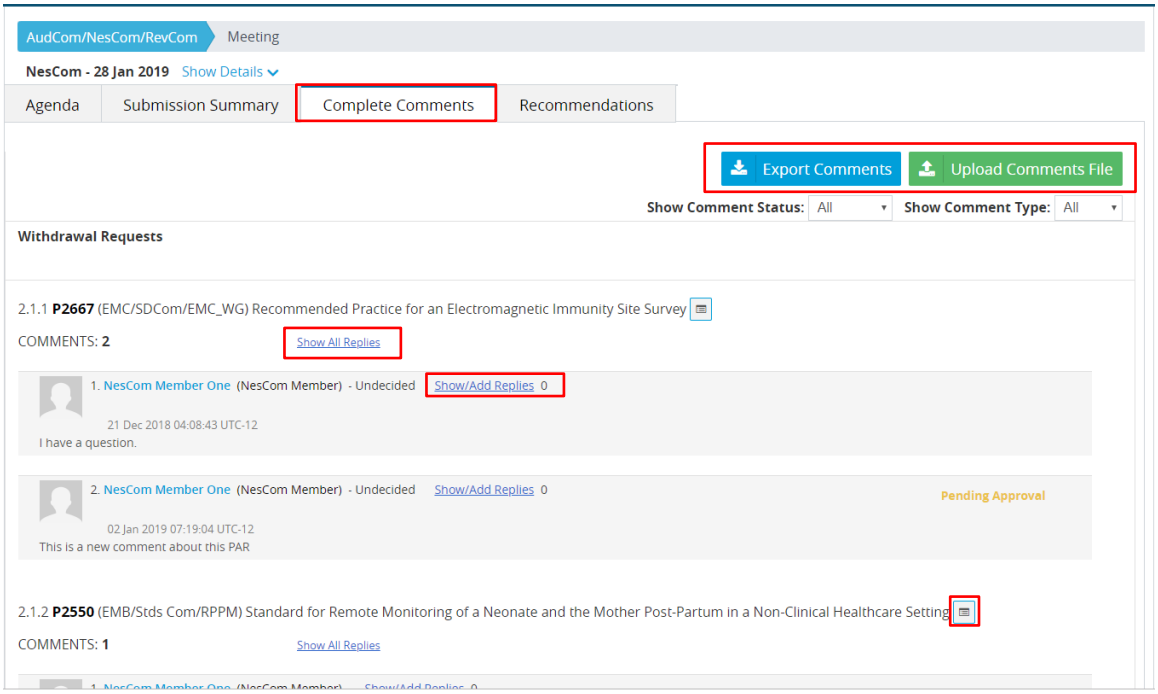
3. Click on the **View Meeting Details** icon. The Agenda tab will appear containing the agenda for the selected meeting.
    a. To view a PAR, click on the **PAR** number.
    b. To submit a preliminary vote or comment on a submission, click on the **View Submission Details** icon.
    c. Download a Zipped or PDF version of the agenda using the appropriate icons.



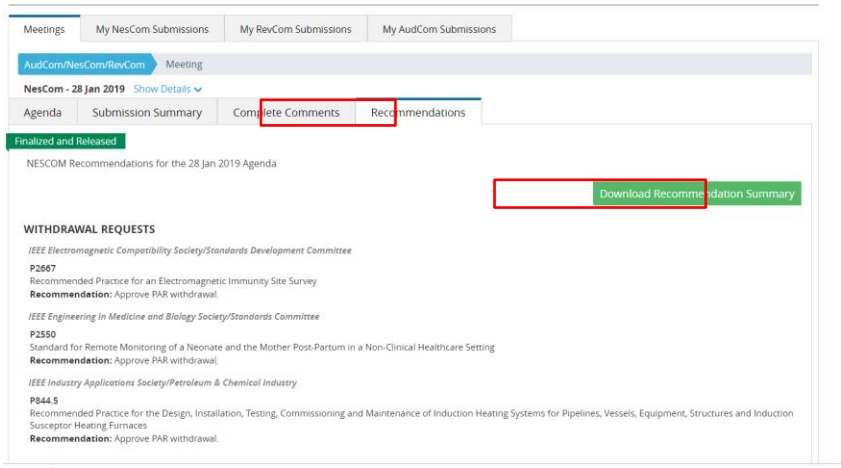
4. For a detailed list of the items on the agenda including submission date, PAR number, number of comments and preliminary votes, click the **Submission Summary** tab.



5. To see a compilation of comments for each agenda item, click on the **Complete Comments** Tab.
    a. Click on the **PAR** number to view the PAR.
    b. Click **Export Comments** to export a file of all comments
    c. Click Upload Comments File to……
    d. Click **Show All Replies** to see all replies for a specific agenda item.
    e. Click **Show/Add Replies** to add a rely to a specific agenda item.
    f. Click the **Submission Details** icon next to a specific item to vote or comment on that item.



6. To view all Recommendations for a specific agenda, click on the **Recommendations Tab**. Click **Download Recommendation Summary** to download a PDF for all recommendations.



7.2.8 *Accept, Finalize and Release or Reject a PAR*

Before a PAR can be released to the NesCom Committee members, the NesCom Administrator must log NesCom recommendations and then record SASB Approval

Applicable Users:

- NesCom Admin

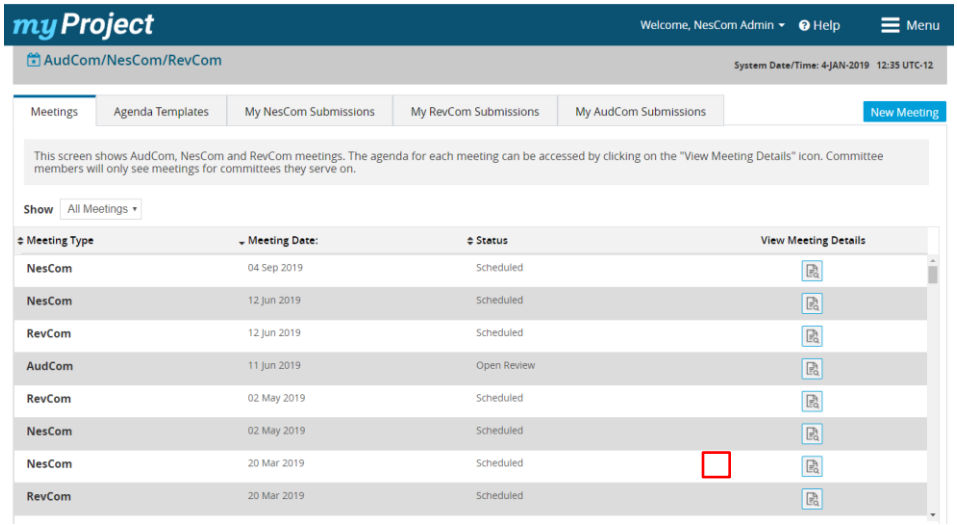
Notes:

- The NesCom Administrator must approve and finalize the PAR before it will be visible to NesCom Committee Members.

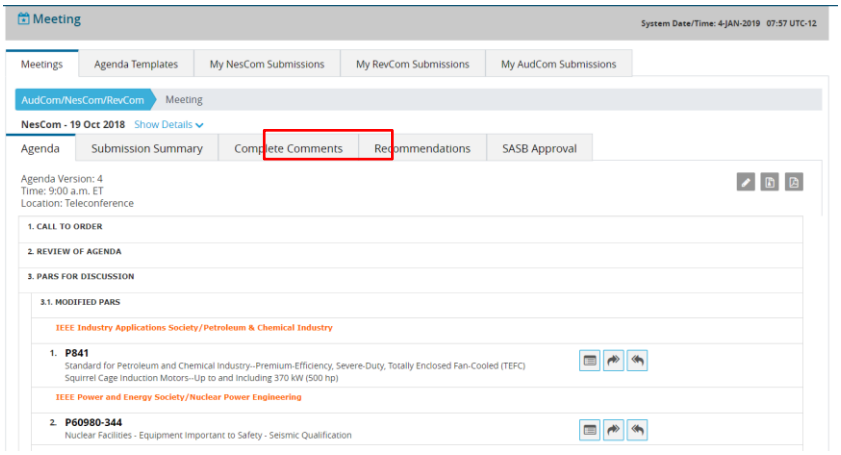
7.2.8.1 Record NesCom Committee Recommendations

Instructions:

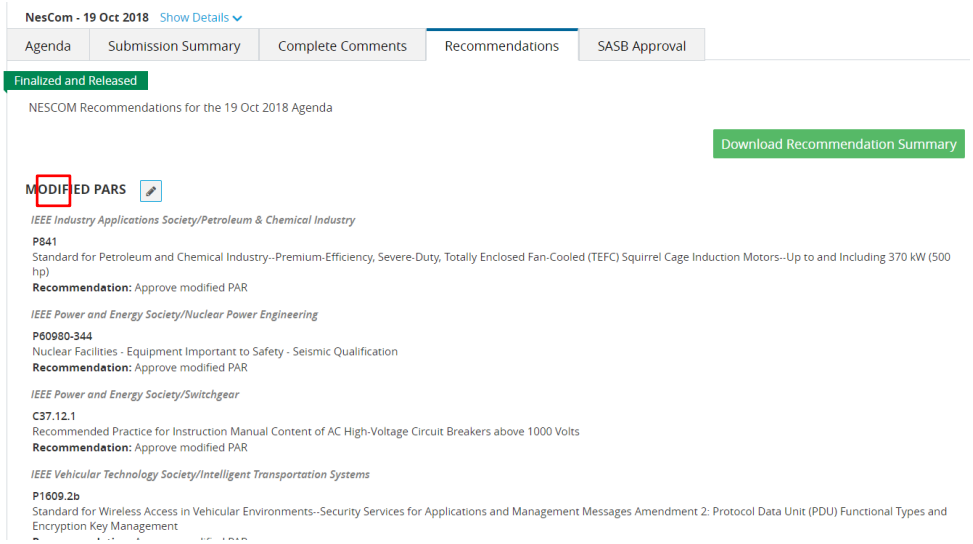
1. On the myProject Home page, select **Menu**.
2. Click **AudCom/NesCom/RevCom**.
3. Search for the appropriate meeting and click **View Meeting Details** icon.



4. Click on the **Recommendations** Tab.

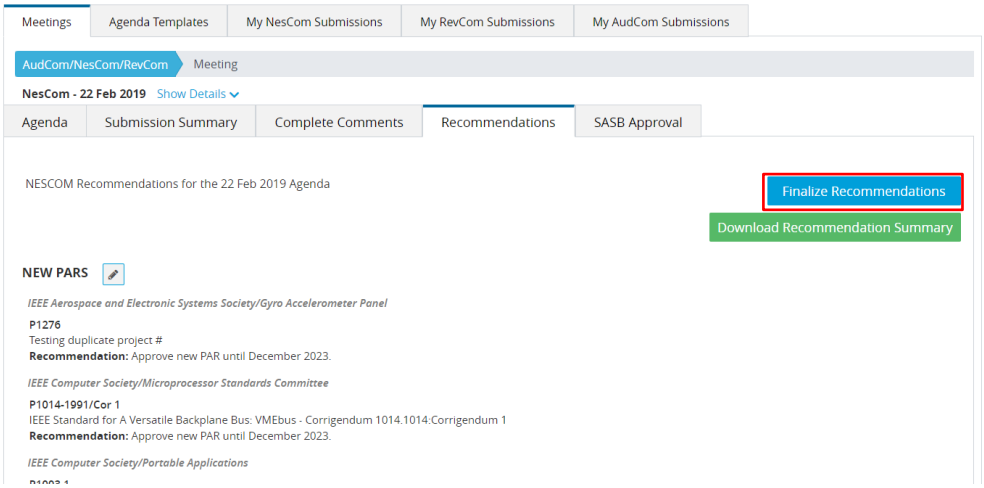


5. To enter the NesCom Committee recommendations for each item on the meeting agenda, click the **edit icon** next to each section heading.



6. Enter the recommendation into the Recommendation fields and click **Save**.

7. When all recommendations are complete, click **Finalize Recommendations**.

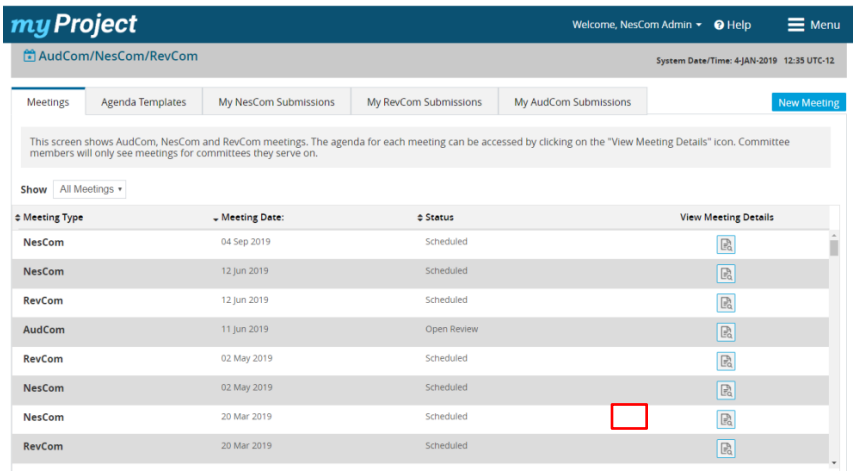


7.2.8.2 Record Decisions of SASB

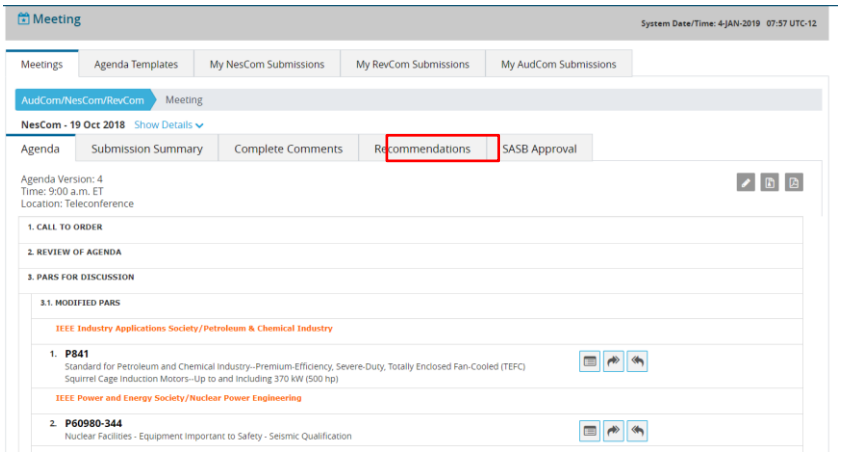
Once all recommendations for a PAR have been recorded, the NesCom Admin will record the decisions of the SASB. Each agenda item can be edited separately.

Instructions:

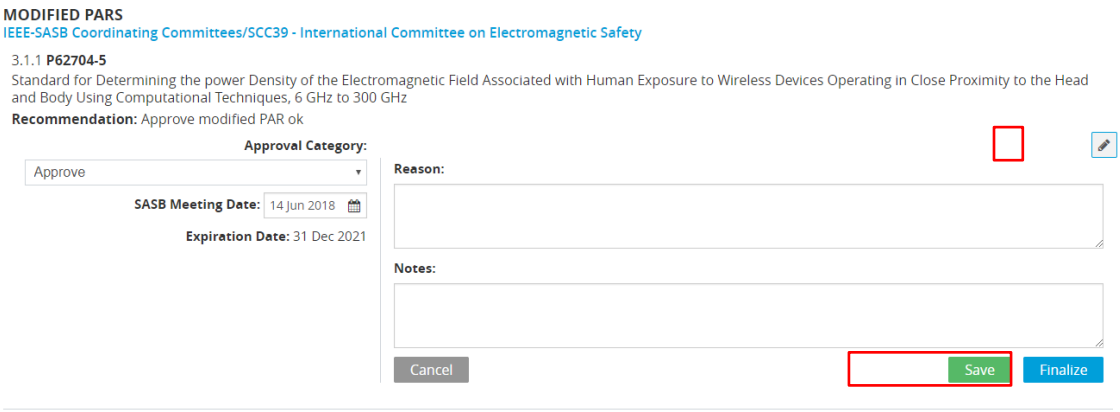
1. On the myProject Home page, select **Menu**.
2. Click **AudCom/NesCom/RevCom**.
3. Search for the appropriate meeting and click **View Meeting Details** icon.



4. Click on the **SASB Approval** tab.



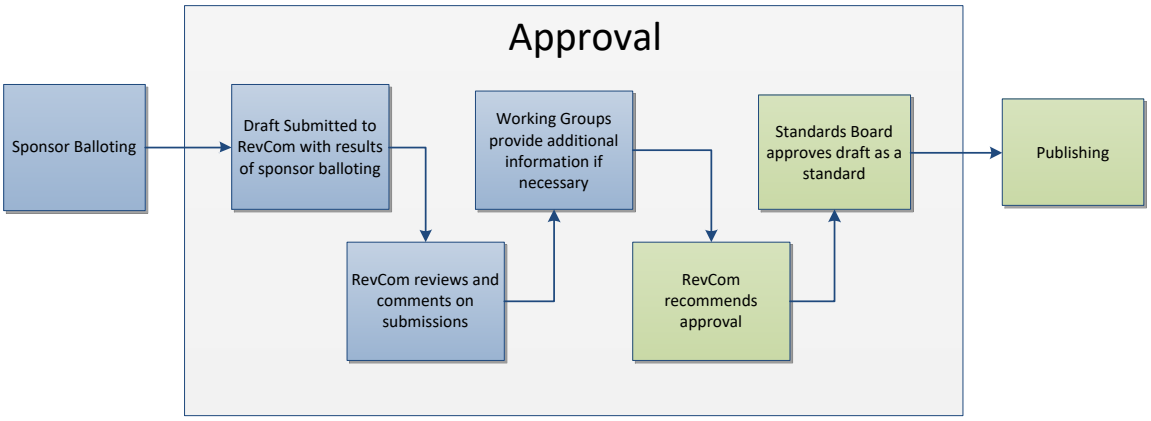
5. Click on the **Edit** icon next to the agenda item to be approved.
6. From the **Approval Category** dropdown box, choose one of the following:
    a. **Approve**: Approve will change the status of the PAR to Active and sends a notification to committee members.
    b. **Conditionally Approve:** PAR status remains "submitted" and email notification is sent regarding conditional approval.
    c. **Defer**: Moves PAR to future meeting agenda
    d. Disapprove: PAR is returned to "draft" status and can be re-submitted.
7. If desired, enter appropriate information into the **Reason** and **Notes** fields.
8. Click **Save** or **Finalize**.



7.3 RevCom

7.3.1 RevCom Submission and Review

After a draft has been balloted and consensus reached, the project can be submitted for approval. The draft, along with information from the balloting process will be submitted for review by the RevCom (Review Committee). RevCom will then recommend approval of the standard to the Standards Board. Once the Standards Board approves the project, the draft becomes a standard and is ready to be prepared for publishing.



Relevant sections of the myProject user guide:

- Draft is Submitted - **7.3.4.1.1 Submit a Project to RevCom**
- RevCom Reviews Submission – **7.3.1.7 Vote and Comment on a Submission**
- Working Groups Provide Additional Information – **7.3.1.8 View RevCom Submission and Respond to Comments**

7.3.2 *Create a RevCom Meeting*

In order to create a RevCom meeting within myProject, meeting dates and other deadlines must first be entered.

Notes:

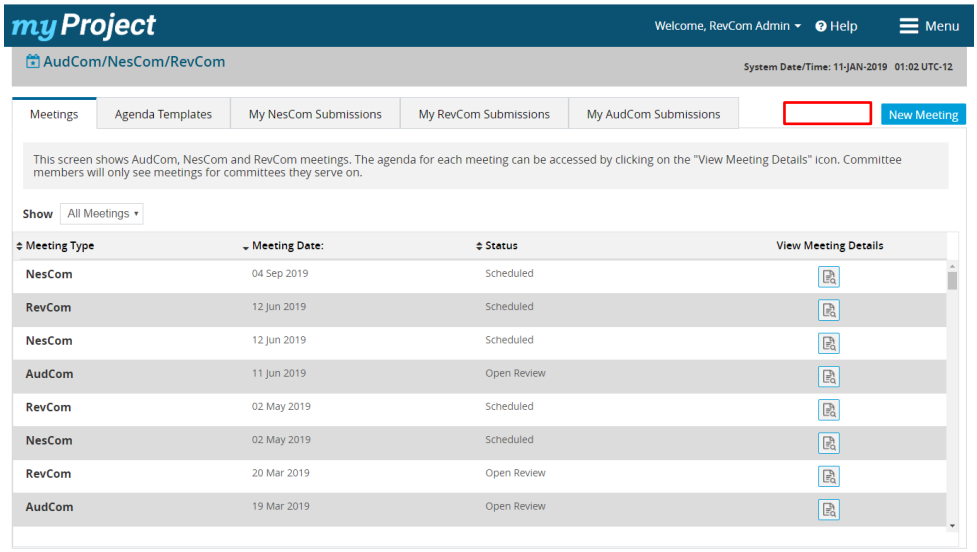
- Users will not be able to submit projects if there are no open agendas.

Applicable Users:

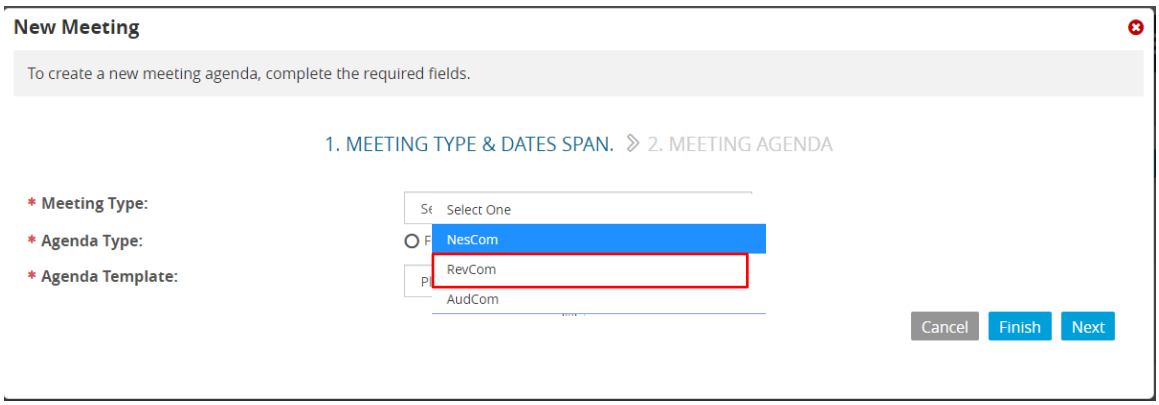
- RevCom Administrator

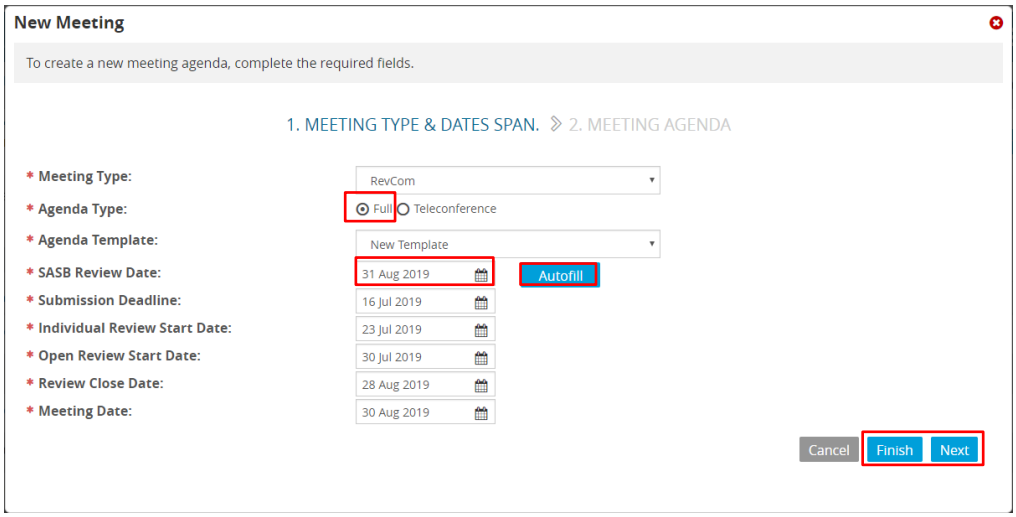
Instructions:

1. On the **myProject** Home Screen click **Menu**.
2. Click **AudCom/NesCom/RevCom**.
3. Click **New Meeting**.



4. From the **Meeting Type** dropdown, choose **RevCom**.





5. Choose an **Agenda Type**
6. Enter **the SASB Review date**.
7. Click **Autofill** to automatically generate dates for all fields. You can manually edit dates if required.
8. Click **Finish** to save the meeting without creating the agenda. Click **Next** to create a meeting agenda.

7.3.3 *Create and Modify an Agenda*

An agenda must be created before submissions can be added to it. Once an agenda is created, RevCom submissions will automatically be added to the appropriate part of the agenda.

Notes:

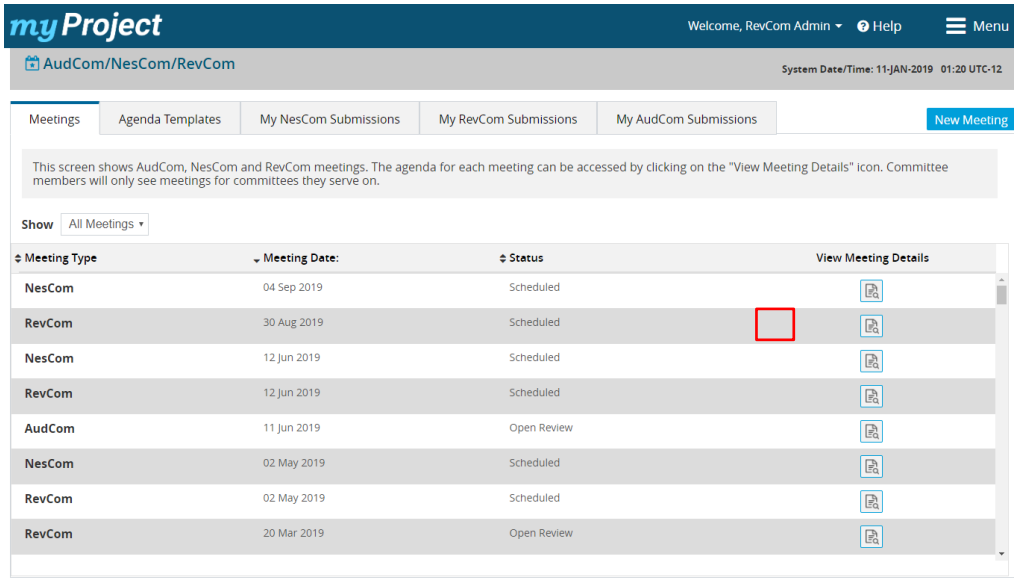
- Users will not be able to submit projects if there are no open agendas.

Applicable Users:

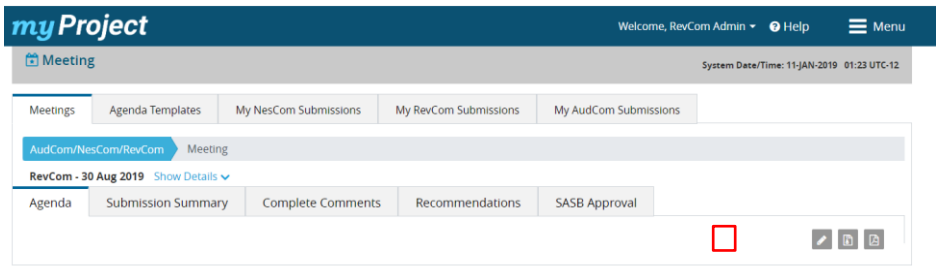
- RevCom Administrator

Instructions:

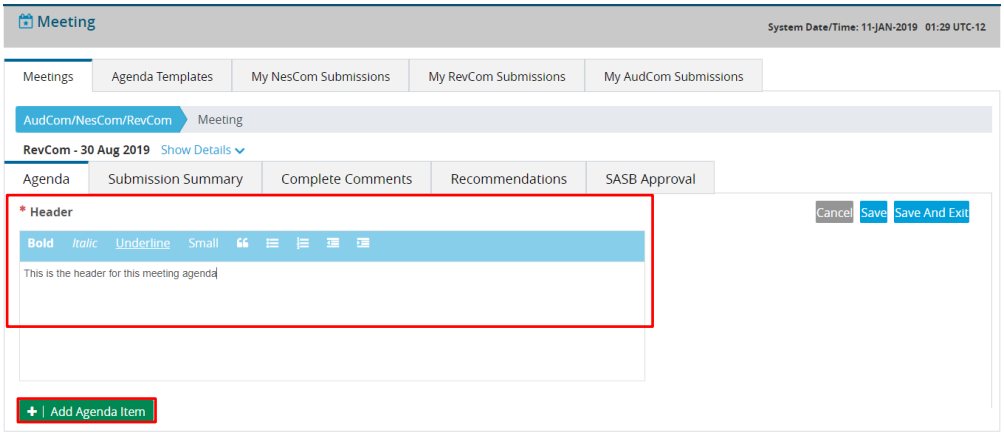
1. On the **myProject** Home Screen, click **Menu**.
2. Click **AudCom/NesCom/RevCom**. The Meetings tab will appear.
3. Locate the meeting you want to build an agenda for and click the **View Meeting Details** icon.



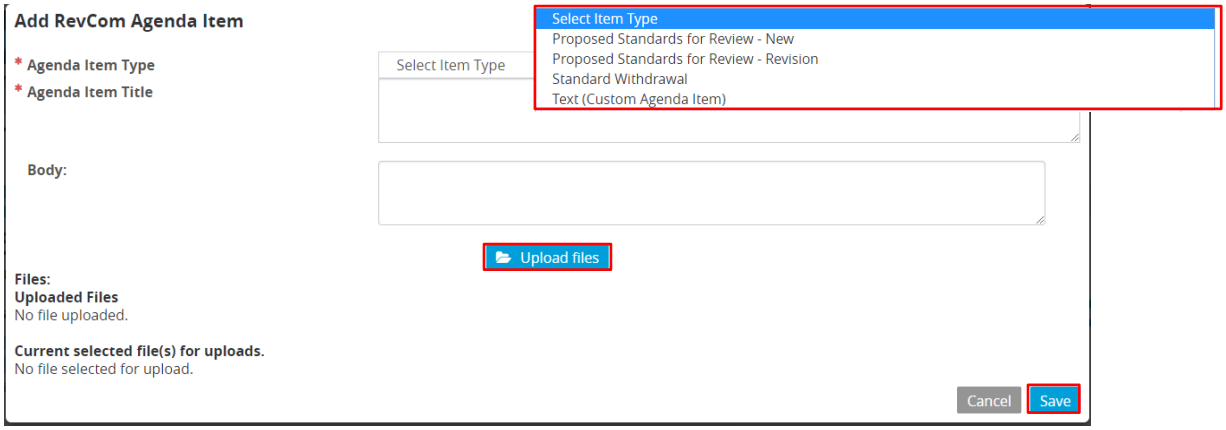
4. Click the **Edit Agenda** icon.

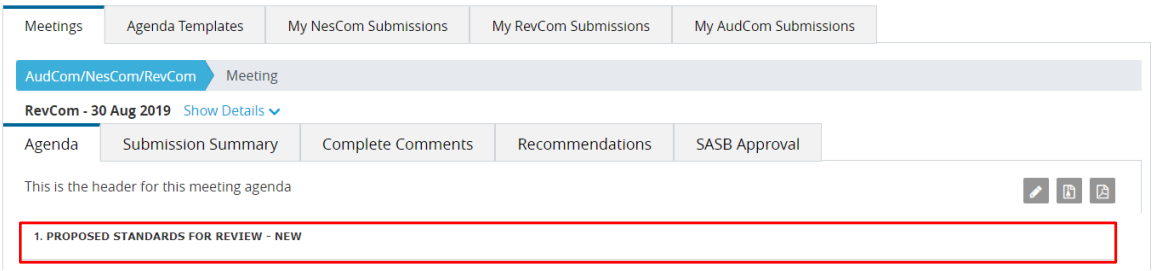


5. In the **Header** box, type a header for the agenda.
6. Click **Save**.
7. Click **Add Agenda Item**.

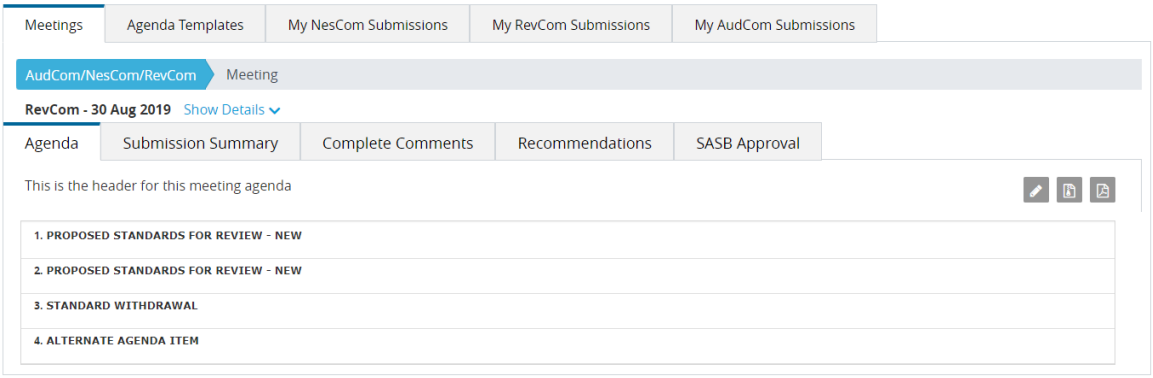


8. From the Agenda Item Type drop down, choose an **Agenda Item Type**. To enter an item not on the list, chose **Text(Custom Agenda Item)**. The Agenda Item Title will automatically populate with the agenda item type but it can be edited.
9. Enter **Body** text if desired.
10. If files are to be attached to the agenda, click **Upload Files.**
11. Click **Save**. The agenda item will be saved to the agenda.

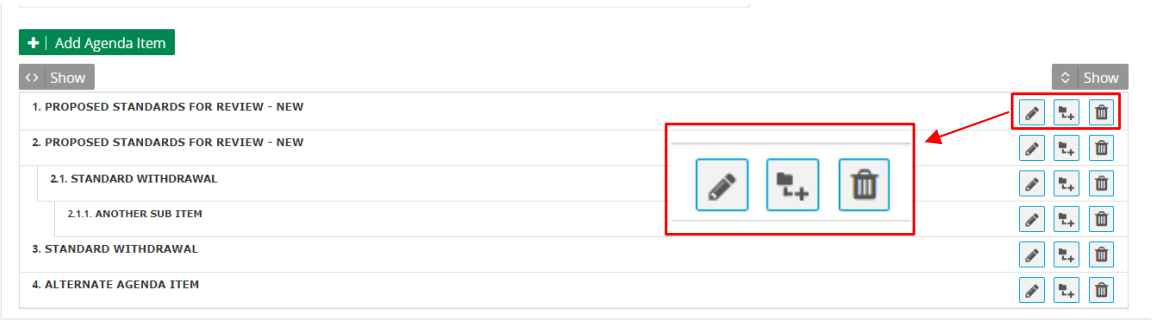




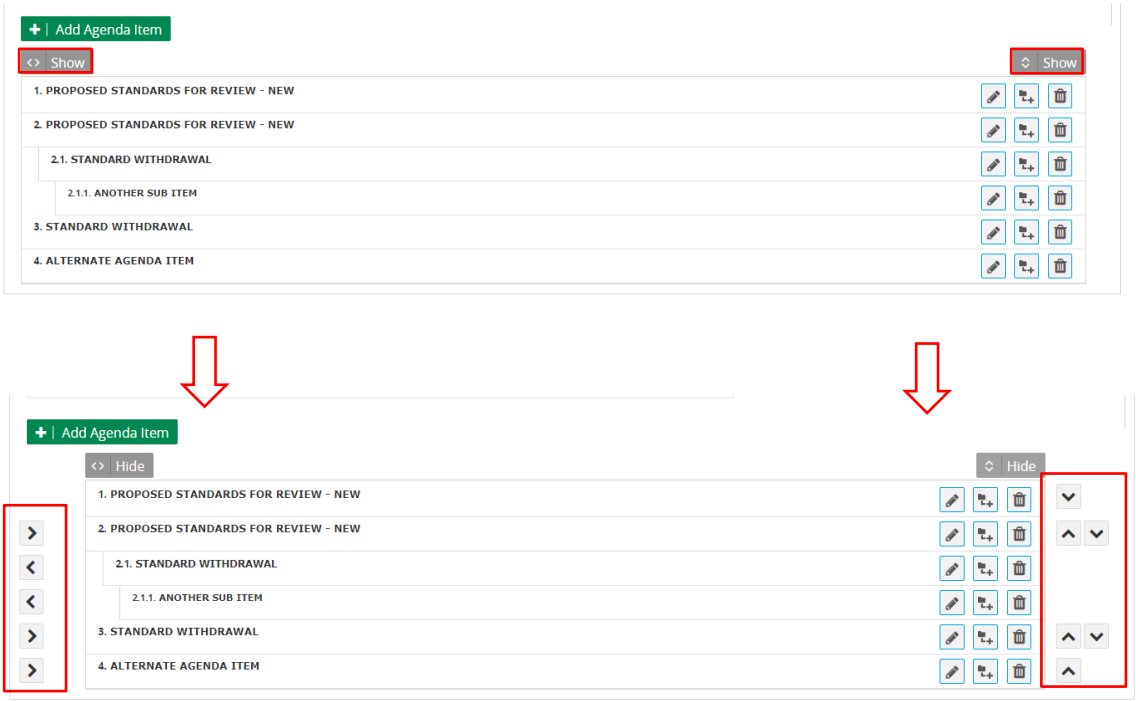
12. Repeat the process to add additional agenda items.



Once the item is added, it can be edited, deleted, or a sub-item can be added.



13. **Re-order or demote/promote** sub-items on the agenda by clicking on the **show/hide buttons** at the top of the agenda item list. Use the **right/left or up/down** arrows to move the agenda items.



7.3.4 *Submit a Project to RevCom*

A balloted draft may be submitted to RevCom at any time after balloting or during a recirculation. Additional information on requirements for RevCom submission can be found here: http://standards.ieee.org/about/sasb/revcom/revguide.html

Notes:

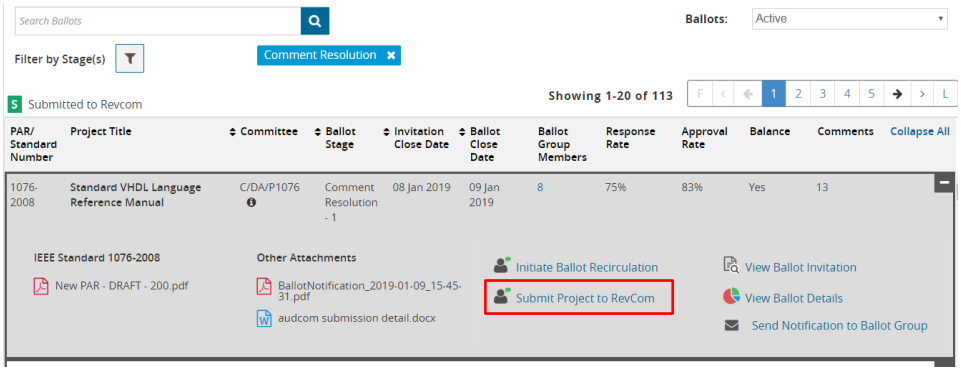
- Additional documents and/or source files may be uploaded at any time. These files will be saved even if you do not complete the submission.
- Source files include the Word or Framemaker files for the draft and all figures created outside of the Framemaker or Word document. These files are **required** and must be sent to editorial staff if they are not uploaded via myProject.

Applicable Users:

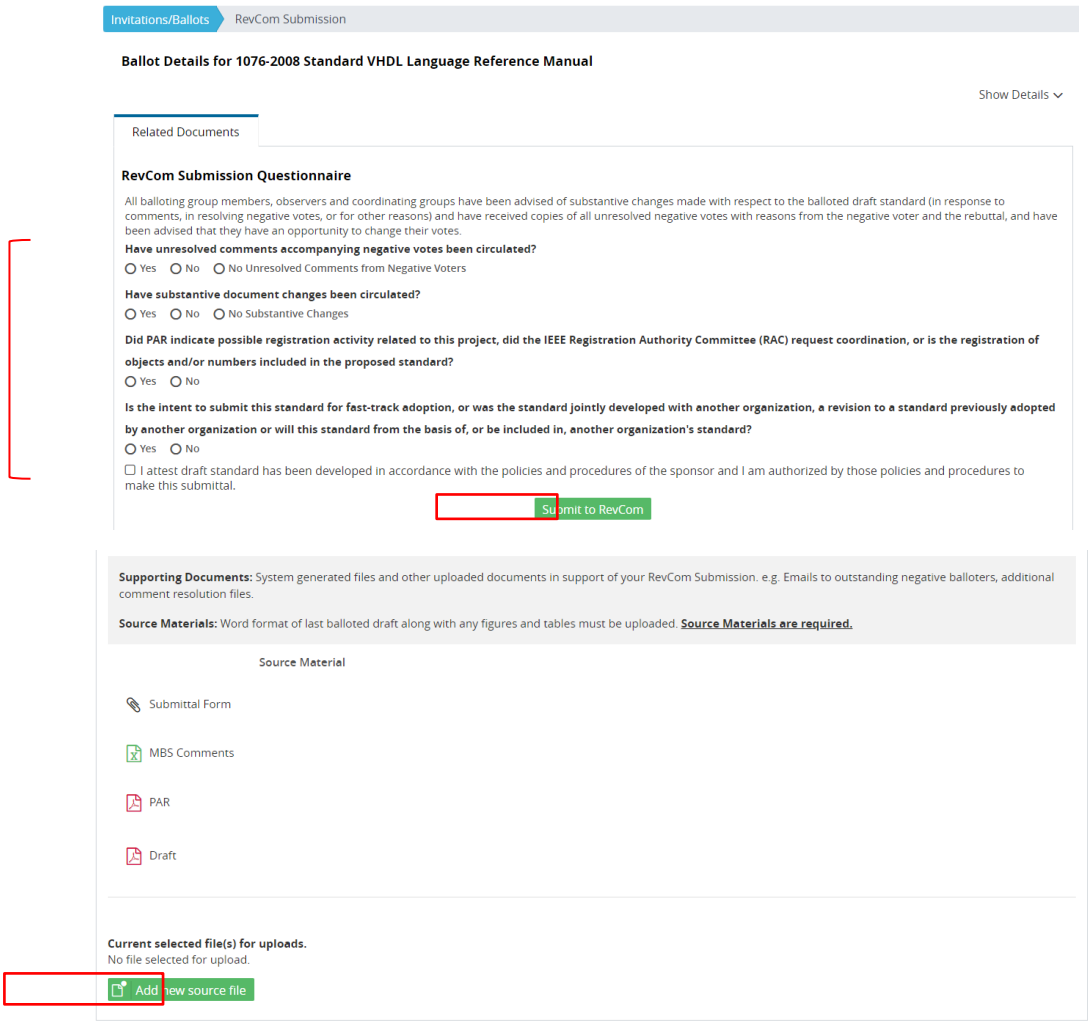
- Standards Committee Chair, Standard Representative, Working Group Chair/Co-Chair/Vice-Chair, RevCom Designee

Instructions:

1. On the **myProject** Home Screen click **Menu**.
2. Click **Invitations/Ballots.**
3. Use the **Search Ballots field** or the **Filter by Stage** function to locate the project you want to submit to RevCom.
4. Click **Submit Project to RevCom** next to the PAR/Standard you would like to submit.



5. Respond to the questions on the **RevCom Submission Questionnaire** by clicking the appropriate button and check the box to confirm your adherence to policies and procedures.
6. Scroll down to see attached supporting material and click **Add new source file** if you want to add a file to the submission.
7. Click **Submit to Revcom** and **Yes** to confirm.


Invitations/Ballots
RevCom Submission
Ballot Details for 1076-2008 Standard VHDL Language Reference Manual
Show Details
Related Documents
RevCom Submission Questionnaire
All balloting group members, observers and coordinating groups have been advised of substantive changes made with respect to the balloted draft standard (in response to comments, in resolving negative votes, or for other reasons) and have received copies of all unresolved negative votes with reasons from the negative voter and the rebuttal, and have been advised that they have an opportunity to change their votes.
Have unresolved comments accompanying negative votes been circulated?
Yes No No Unresolved Comments from Negative Voters
Have substantive document changes been circulated?
Yes No No Substantive Changes
Did PAR indicate possible registration activity related to this project, did the IEEE Registration Authority Committee (RAC) request coordination, or is the registration of objects and/or numbers included in the proposed standard?
Yes No
Is the intent to submit this standard for fast-track adoption, or was the standard jointly developed with another organization, a revision to a standard previously adopted by another organization or will this standard from the basis of, or be included in, another organization's standard?
Yes No
I attest draft standard has been developed in accordance with the policies and procedures of the sponsor and I am authorized by those policies and procedures to make this submittal.
Submit to RevCom
Supporting Documents: System generated files and other uploaded documents in support of your RevCom Submission. e.g. Emails to outstanding negative balloters, additional comment resolution files.
Source Materials: Word format of last balloted draft along with any figures and tables must be uploaded. Source Materials are required.
Source Material
Submittal Form
MBS Comments
PAR
Draft
Current selected file(s) for uploads.
No file selected for upload.
Add new source file

7.3.5 *Accept a RevCom Submission*

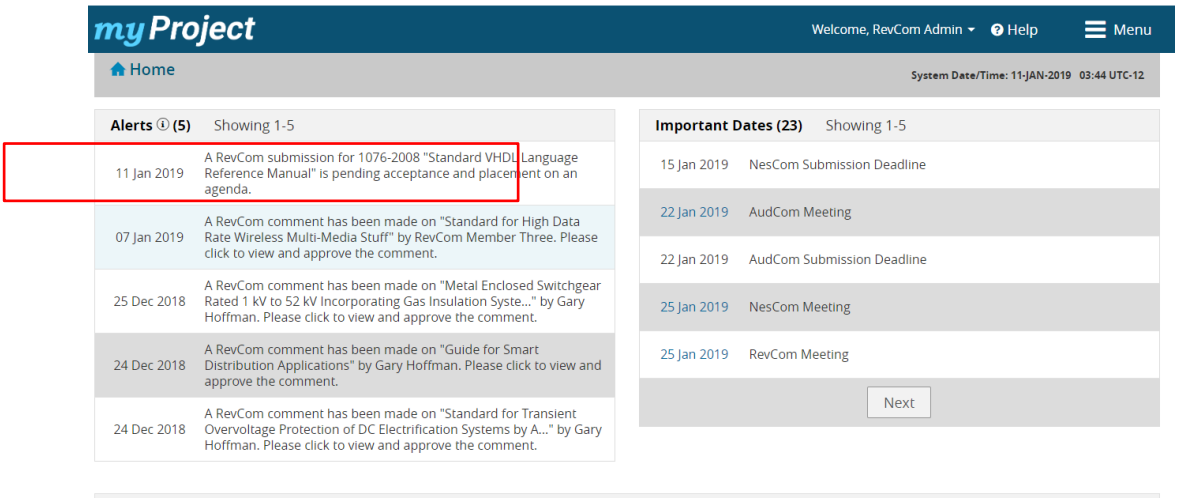
The RevCom Administrator must accept a RevCom Submission before it will be placed on an agenda.

Applicable Users:

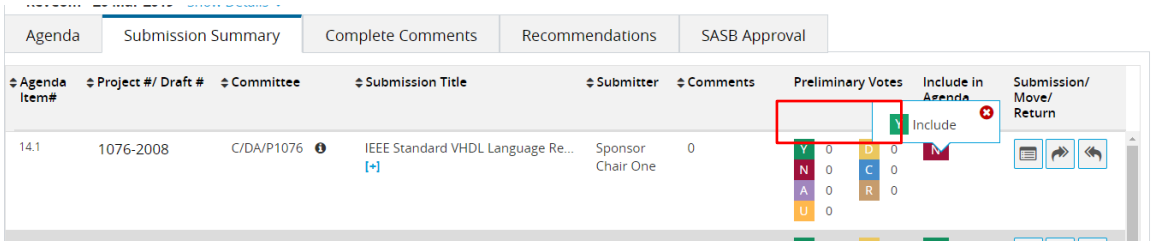
- RevCom Administrator

Instructions:

1. On the **myProject** Home Screen click on the alert that indicates that a RevCom submission is waiting for acceptance and placement on an agenda.



2. Under the **Include in Agenda** column, click the **"N"** and choose **"Y"** to add the submission to the agenda.



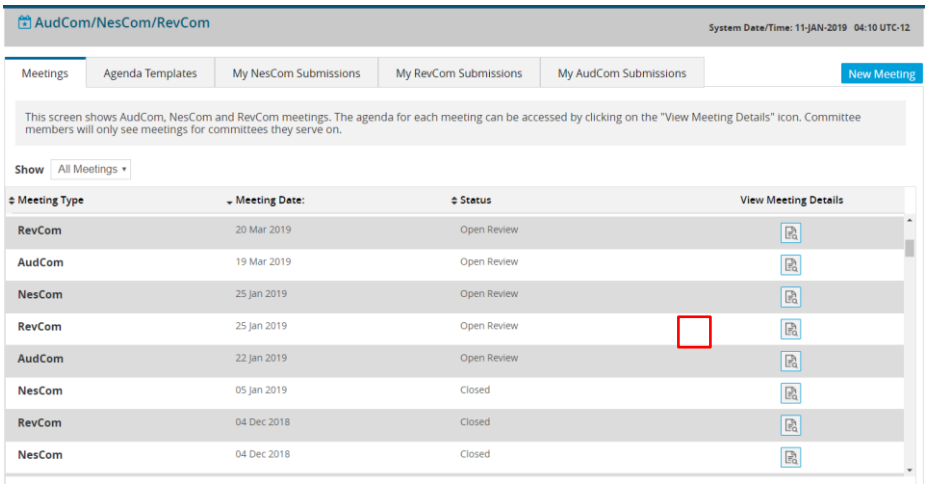
7.3.6 *Move Submissions (Between Meetings)*

Applicable Users:

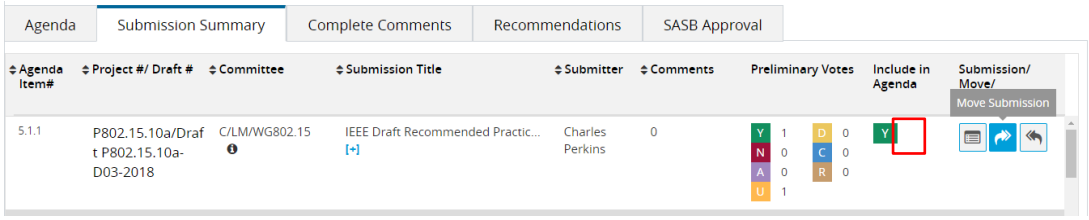
- RevCom Administrator

Instructions:

1. On the **myProject** Home Screen click **Menu**.
2. Click **AudCom/NesCom/RevCom**.
3. Locate the meeting with the submission you want to move and click the **View Meeting Details icon**.



4. Click the **Submission Summary** tab.
5. Locate the submission you want to move and click the **Move Submission** icon under the Submission/Move/Return column.



6. From the drop down, select the meeting to which you want to move the submission.
7. Click **Move**.

7.3.7 *View or Download an Agenda*

Agendas for meetings that have closed or are in "Individual Review" or "Open Review" will be visible to RevCom members.

Applicable Users:

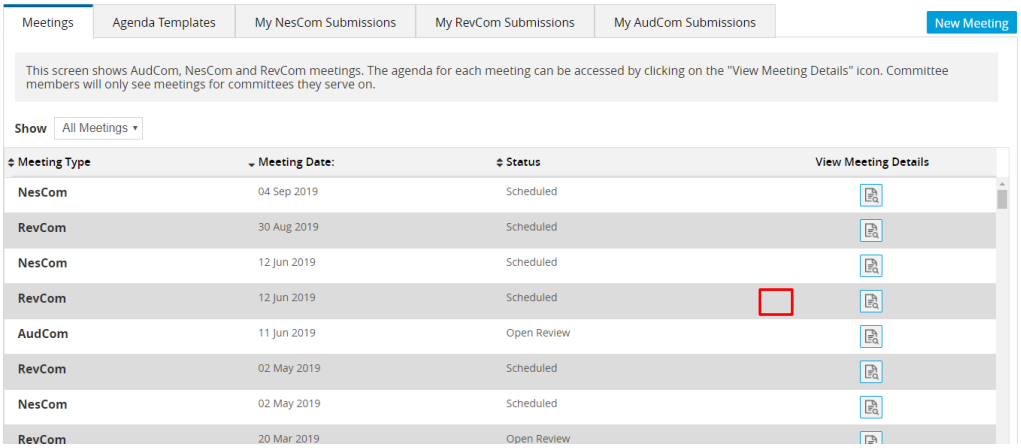
- RevCom Members

Notes:

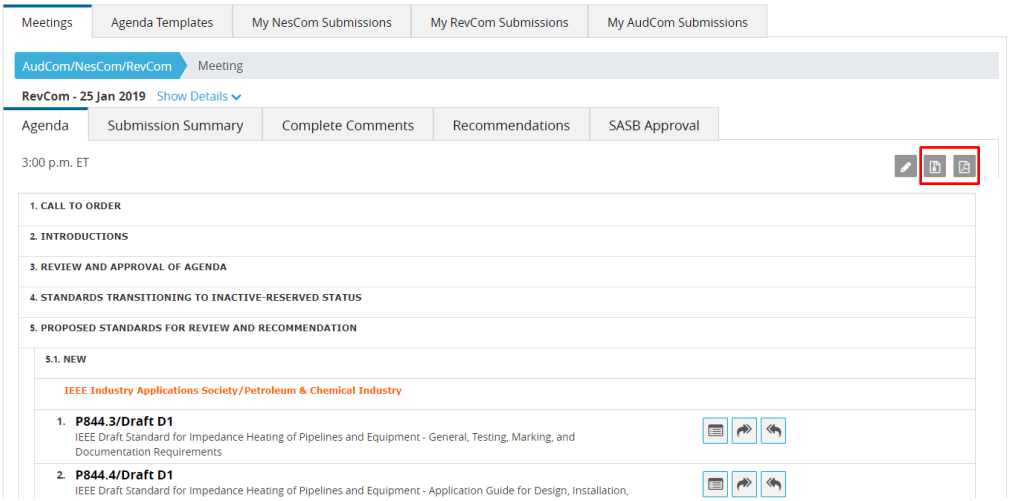
- If the agenda is downloaded as a **Zip file**, updates to the agenda can be downloaded at a later date.

Instructions:

1. On the **myProject** Home Screen click **Menu**.
2. Click **AudCom/NesCom/RevCom**.
3. Locate the meeting you want to view.
4. Click the **View Meeting Details** icon.



5. Review the agenda for the meeting or click **Download Agenda PDF or Download Agenda Zip** to download a copy of the agenda.



6. If you've previously downloaded a **ZIP** file of this agenda, you will be given the option to **Download Updates** or the **Full Agenda**. Click on an option and click **Download**.

7.3.8 *Vote and Comment on a Submission*

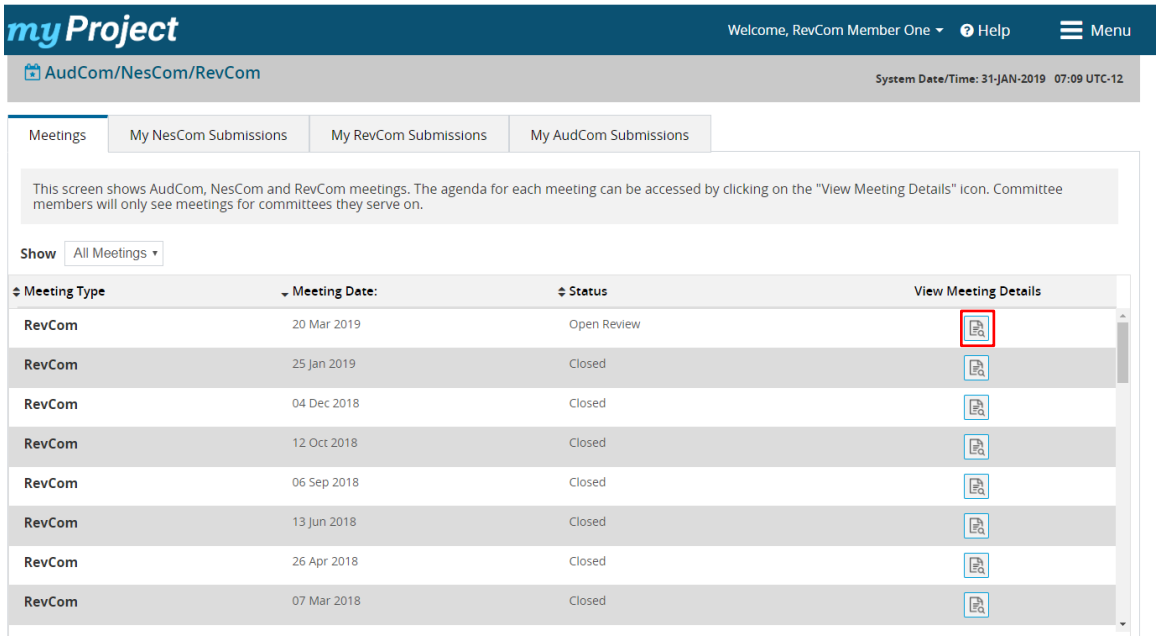
RevCom members may submit comments, dialog with submitters and cast preliminary votes on submissions.

Applicable Users:

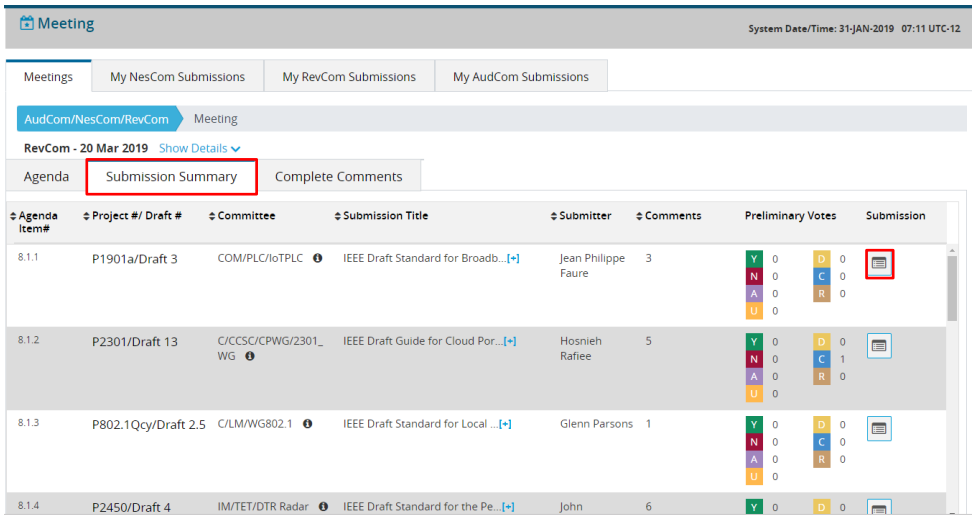
- RevCom Members, IEEE SA Staff

Instructions:

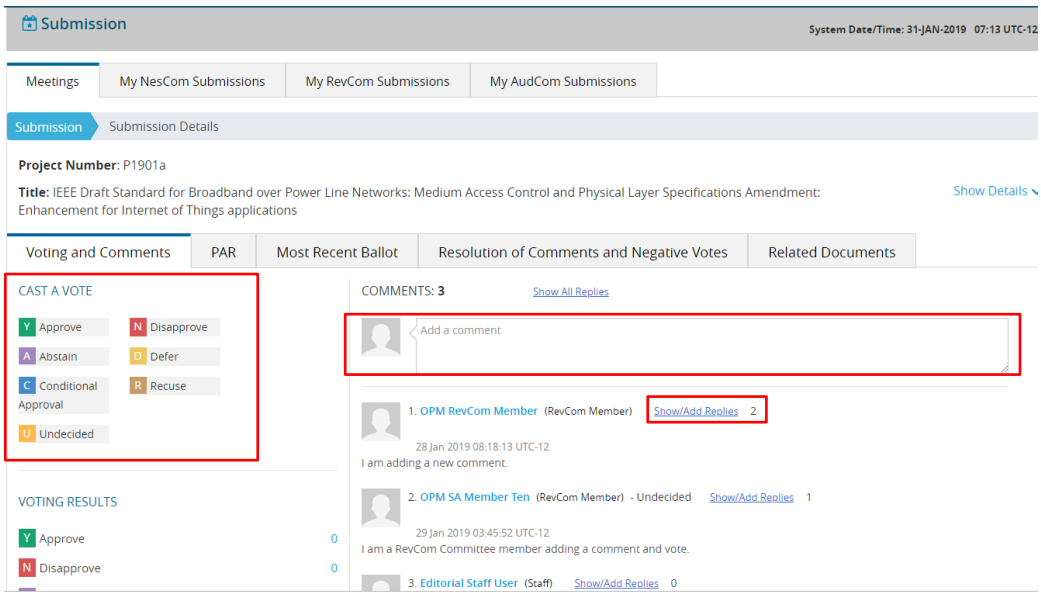
1. On the **myProject** Home Screen click **Menu**.
2. Click **AudCom/NesCom/Revcom**
3. Locate the appropriate meeting.
4. Click **View Meeting Details.**



5. Click the **Submission Summary** Tab to view agenda items.
6. Click the **Submission Details** icon next to the agenda item you want to vote or comment on.



7. In the **Cast A Vote** area, click the desired vote. Your vote will automatically be recorded.
8. To add a comment, click and type in the **Add a comment** box**.**
9. By default, only the latest comment will show for each user. Click on **Show/Add Replies** to see all comments from a user.



7.3.9 *Import Comments*

It is also possible to record comments offline in a spreadsheet and upload them when connected to myProject.

Applicable Users:

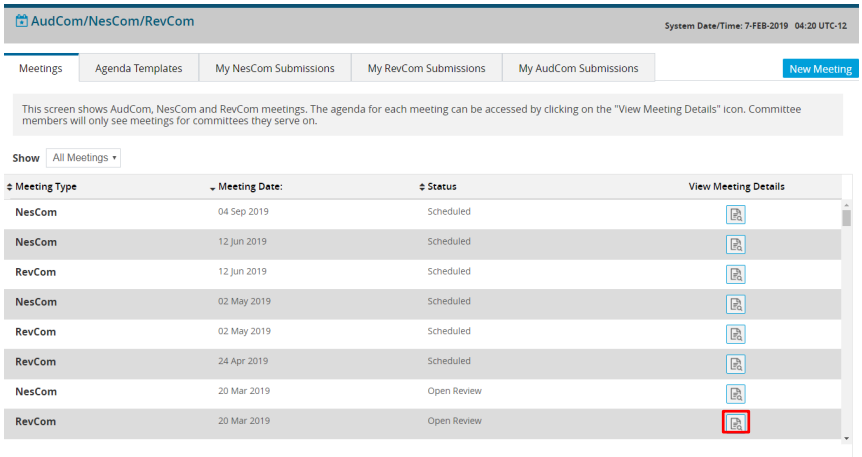
- RevCom Members, IEEE SA Staff

Notes:

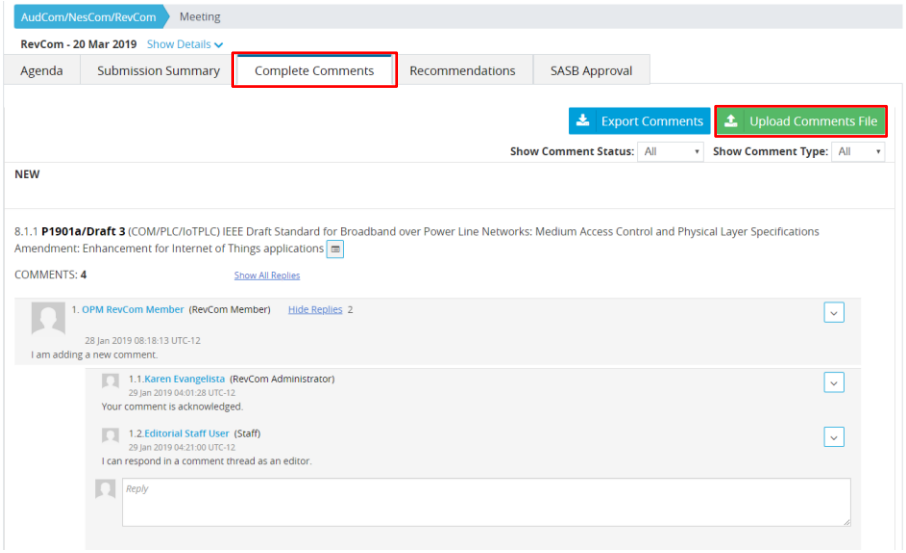
- Users have the ability to download a comments template for each meeting agenda.
- Once uploaded, offline comments can be replied to.

Instructions:

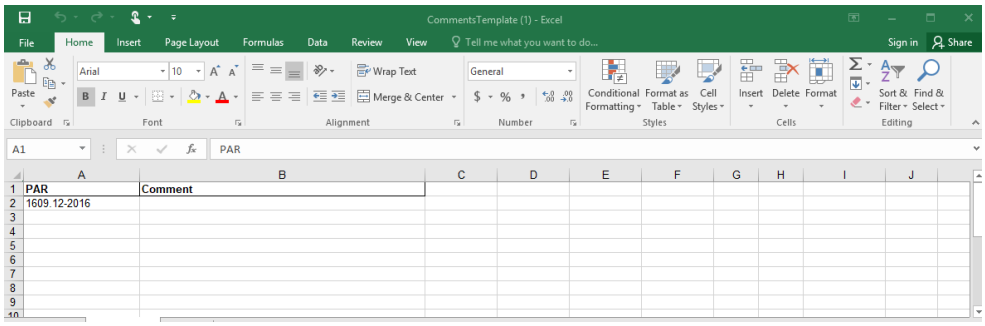
1. On the **myProject** Home Screen click **Menu**.
2. Click **AudCom/NesCom/RevCom**
3. Locate the appropriate RevCom Meeting and click **View Meeting Details**.



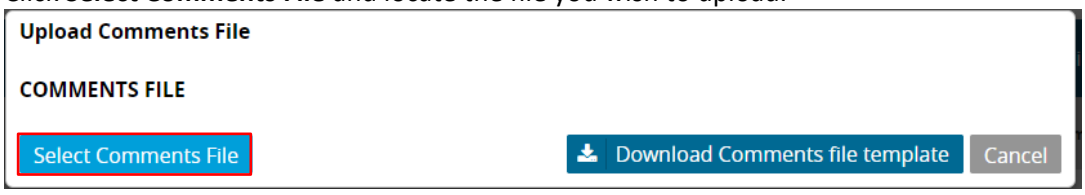
4. Click on the **Complete Comments** tab.
5. Click **Upload Comments File**.



6. Click **Download Comments file template** to download a template for loading offline comments. It will be pre-populated with project numbers.
7. Enter comments to be uploaded and save the file on your PC.



8. Click **Select Comments File** and locate the file you wish to upload.



9. Click **Start Upload**.

10. Click **OK**. The comment will now appear in myProject under the appropriate agenda item.

7.3.10 *View All Comments*

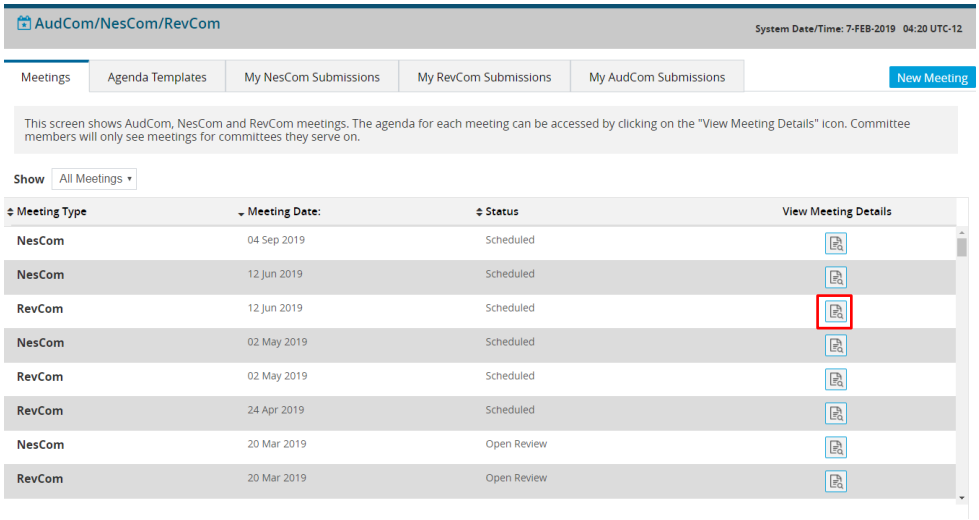
The Complete Comments tab allows RevCom members and staff to view all comments for an agenda

Applicable Users:

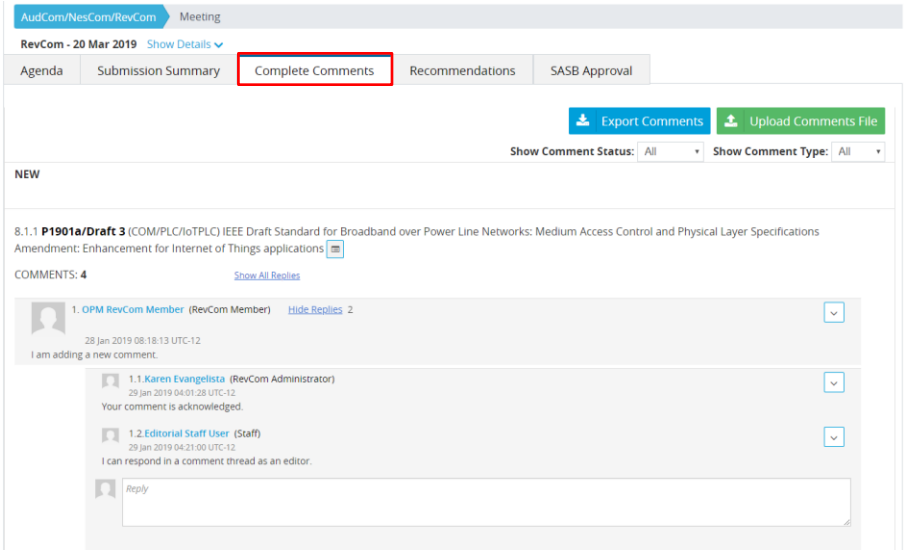
- RevCom Members, IEEE SA Staff

Instructions:

1. On the **myProject** Home Screen click **Menu**.
2. Clicke **AudCom/NesCom/RevCom**.
3. Locate the appropriate RevCom Meeting and click **View Meeting Details**.



4. Click the **Complete Comments** tab. All Comments for the meeting agenda will be displayed.
5. Click **Export Comments** to download a PDF of all comments.



7.3.11 *Approve Comments*

New agenda comments made by RevCom members must be approved by the RevCom administrator before they become visible to submitters and other RevCom members.

Applicable Users:

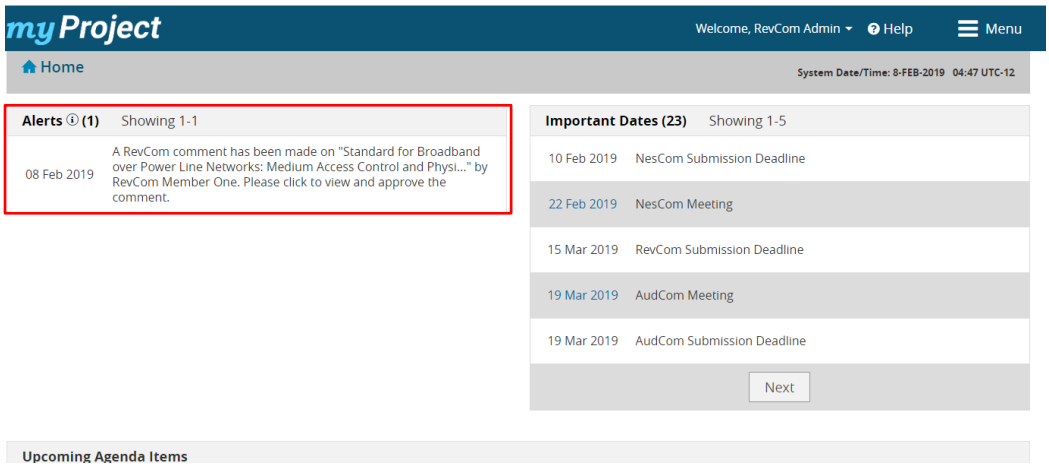
- RevCom Administrator

Notes:

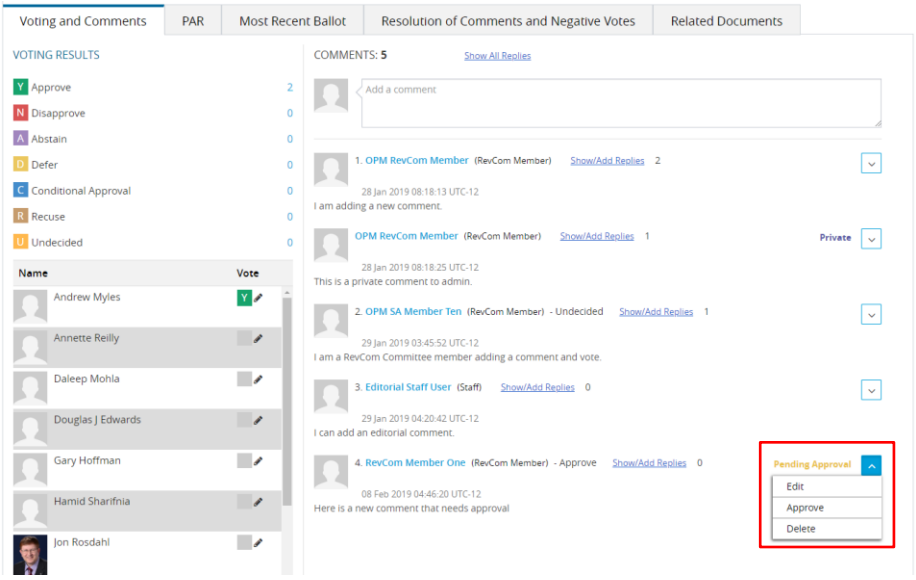
- RevCom Admins can access comments that need approval by clicking on the Alert from the Home Page or through the AudCom/NesCom/RevCom menu.
- Approval is only required for new comments. Responses to existing comments will be added to the comment thread without approval.
- Private comments will be sent directly to the RevCom administrator, they are not recorded in the agenda or open to reply and therefore do not require approval.

Instructions:

1. On the **myProject** Home Screen click the alert that indicates there is a comment waiting for approval. The Voting and Comments screen will appear.



2. Scroll to the new comment and click the **Pending Approval** dropdown to choose **Edit, Approve** or **Delete**.
3. Click **Yes** to confirm.


Voting and Comments
PAR
Most Recent Ballot
Resolution of Comments and Negative Votes
Related Documents
VOTING RESULTS
Approve 2
Disapprove 0
Abstain 0
Defer 0
Conditional Approval 0
Recuse 0
Undecided 0
Name
Vote
Andrew Myles
Annette Reilly
Daleep Mohla
Douglas J Edwards
Gary Hoffman
Hamid Sharifnia
Jon Rosdahl
COMMENTS: 5
Show All Replies
Add a comment
1. OPM RevCom Member (RevCom Member) Show/Add Replies 2
28 Jan 2019 08:18:13 UTC-12
I am adding a new comment.
OPM RevCom Member (RevCom Member) Show/Add Replies 1
Private
28 Jan 2019 08:18:25 UTC-12
This is a private comment to admin.
2. OPM SA Member Ten (RevCom Member) - Undecided Show/Add Replies 1
29 Jan 2019 03:45:52 UTC-12
I am a RevCom Committee member adding a comment and vote.
3. Editorial Staff User (Staff) Show/Add Replies 0
29 Jan 2019 04:20:42 UTC-12
I can add an editorial comment.
4. RevCom Member One (RevCom Member) - Approve Show/Add Replies 0
08 Feb 2019 04:46:20 UTC-12
Here is a new comment that needs approval
Pending Approval
Edit
Approve
Delete

7.3.12 *View RevCom Submission and Respond to Comments*

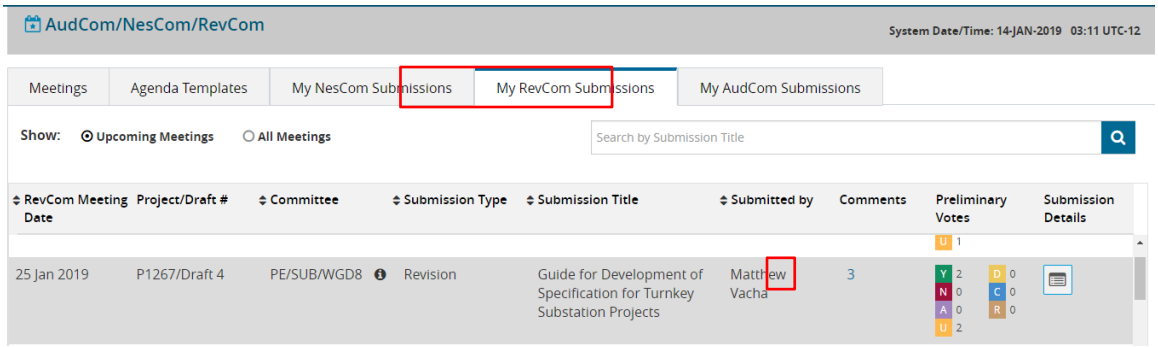
When a Revcom member or RevCom Administrator makes a comment on your submission, you can view the comment and add a response that will be recorded for the agenda.

Applicable Users:

- Standards Committee Chair, Standard Representative, Working Group Chair/Co-Chair/Vice-Chair, RevCom Designee

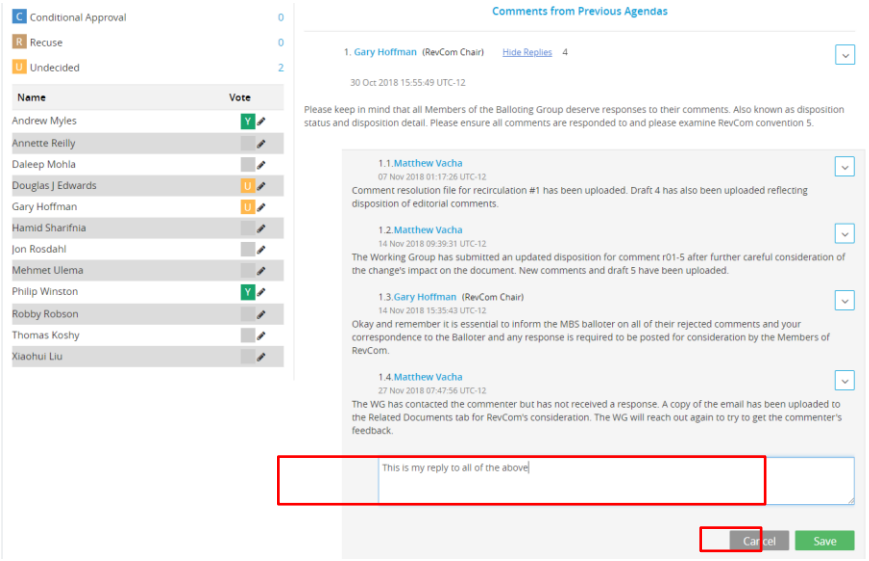
Instructions:

1. On the **myProject** Home Screen click **Menu**.
2. Click **AudCom/NesCom/RevCom**.
3. Click the **My RevCom Submissions** tab.
4. User the **Search by Submission Title** or use the **column filters** to locate the appropriate submission.
5. Click on the **Number** in the **Comments** column.

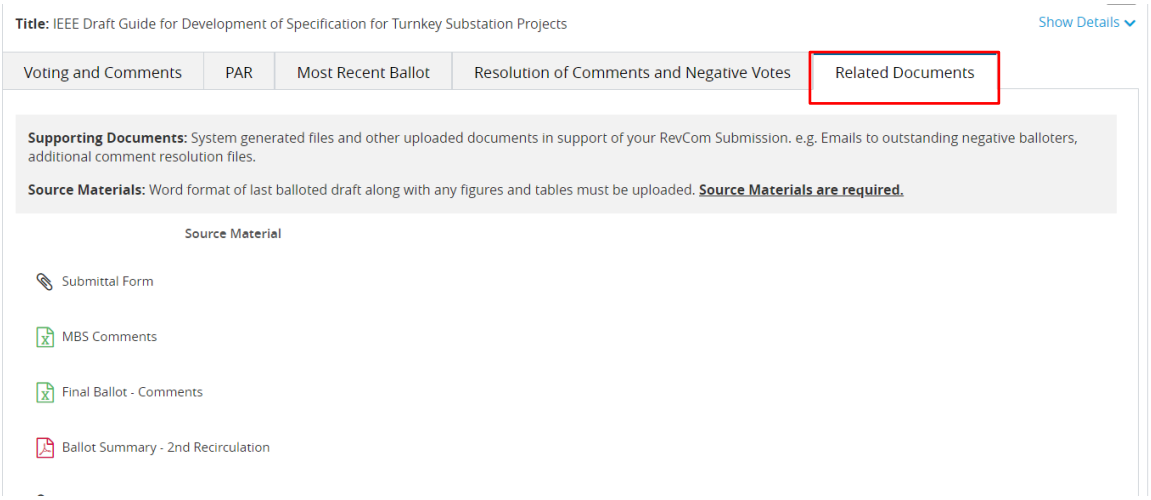


6. Review the comments and click **Show/Add Replies** on the comment you wish to reply to.

7. Comments from all previous agendas will appear. Type your reply in the **Reply** box.
8. Click **Save**.



9. You may also upload additional documents and/or source files by clicking on the **Related Documents** tab.


Title: IEEE Draft Guide for Development of Specification for Turnkey Substation Projects
Show Details
Voting and Comments
PAR
Most Recent Ballot
Resolution of Comments and Negative Votes
Related Documents
Supporting Documents: System generated files and other uploaded documents in support of your RevCom Submission. e.g. Emails to outstanding negative balloters, additional comment resolution files.
Source Materials: Word format of last balloted draft along with any figures and tables must be uploaded. Source Materials are required.
Source Material
Submittal Form
MBS Comments
Final Ballot - Comments
Ballot Summary - 2nd Recirculation

7.3.13 *Return a Submission*

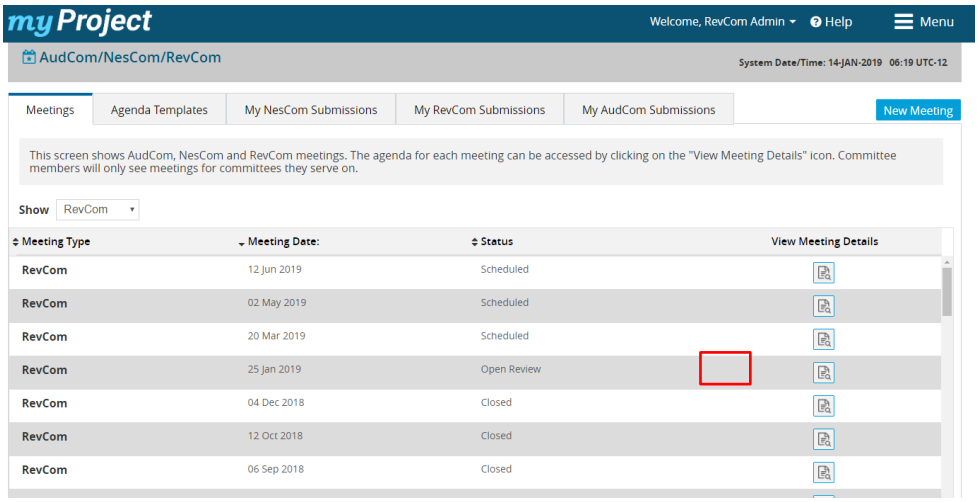
This feature can be used if it becomes necessary to remove a submission from all agendas and return it to the Working Group for submission at a later date.

Applicable Users:

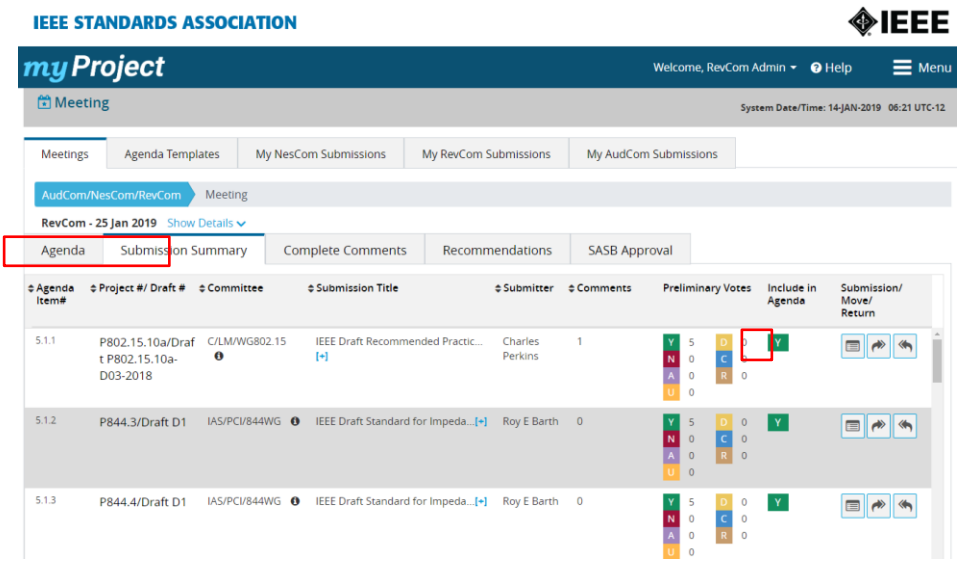
- RevCom Administrator

Instructions:

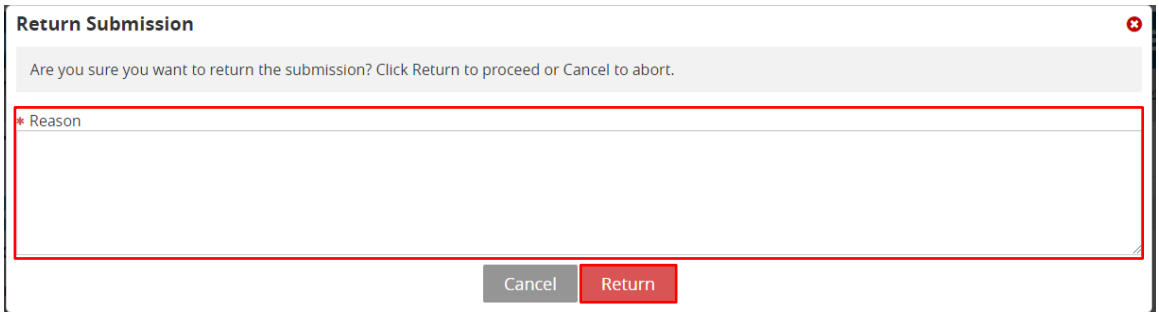
1. On the **myProject** Home Screen click **Menu**.
2. Click **AudCom/NesCom/Rev/Com**.
3. Locate the meeting with the submission you wish to return to the Working Group.
4. Click on the **View Meeting Details** icon.



5. Click on the **Submission Summary** tab.
6. Click on the **Return Submission** icon.



7. Enter a reason you are returning the submission in the **Reason** box.,
8. Click on **Return**. The submission will be returned to the Working Group.



7.3.14 *Edit Recommendations*

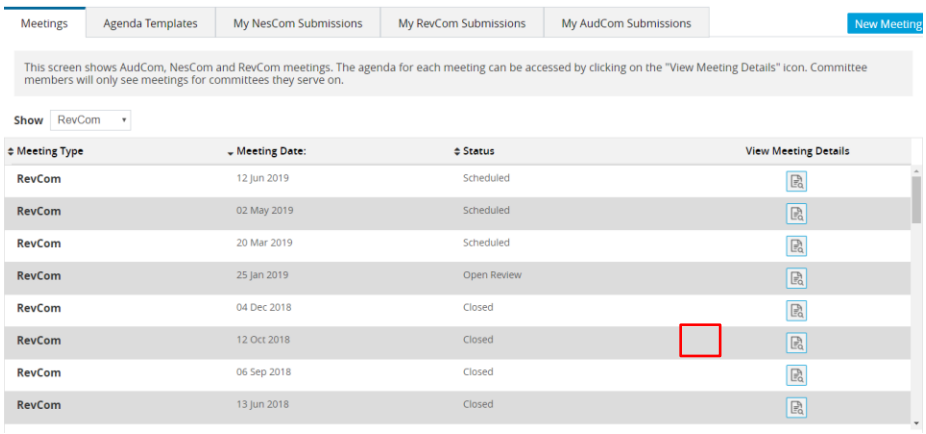
Once the meeting has completed, you may add the recommendations from the meeting to the submissions on the agenda. These recommendations will be available in the agendas of closed meetings and be transferred into the minutes.

Applicable Users:

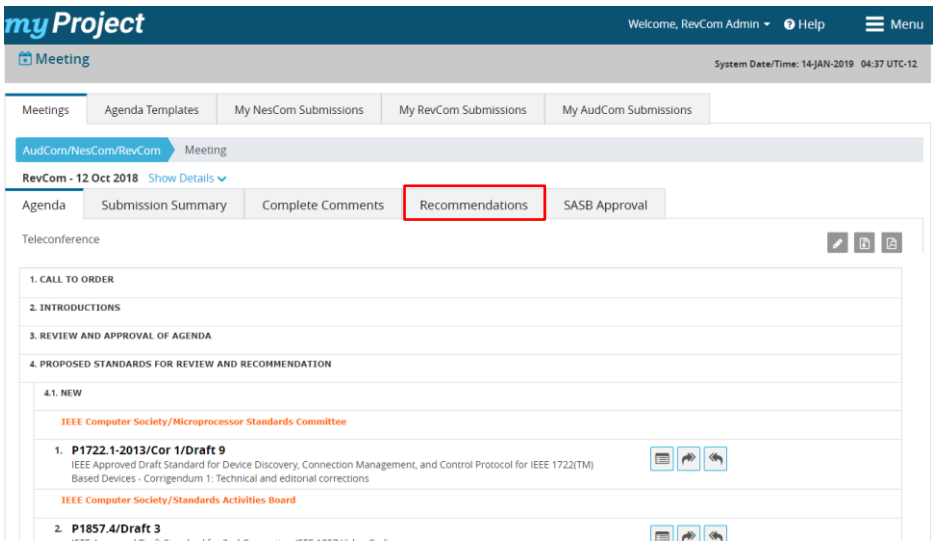
- RevCom Administrator

Instructions:

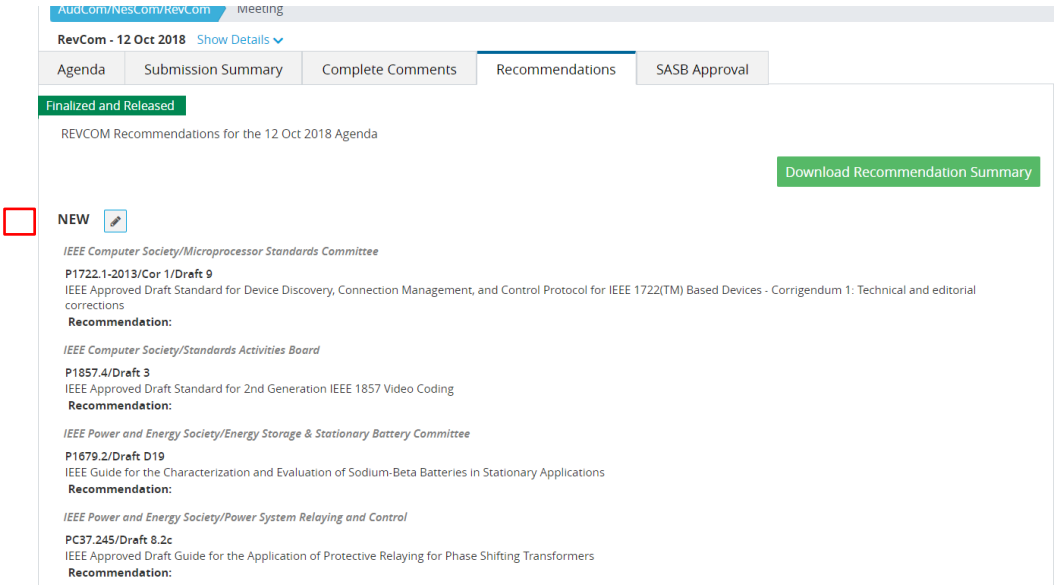
1. On the **myProject** Home Screen click **Menu**.
2. Click **AudCom/NesCom/Rev/Com**.
3. Locate the meeting with the submissions to which you wish to add recommendations.
4. Click on the **View Meeting Details** icon.



5. Click on the **Recommendations** tab.

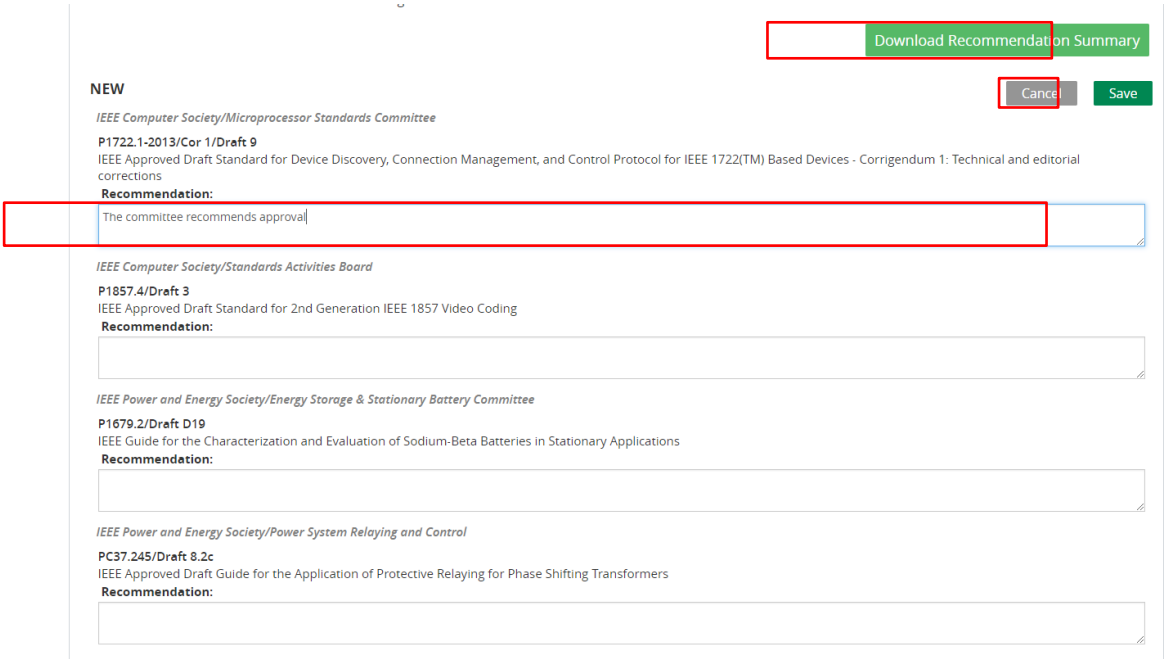


6. Scroll to locate the recommendation you want to edit. Click the Edit icon.



7. Enter RevCom Committee recommendations in the **Recommendation** box for each item.

8. Click **Save**.
9. Click **Download Recommendation Summary** for to download a PDF of all recommendations.



7.3.15 *Recording SASB Approval and Superseding a Standard*

The RevCom Administrator will record SASB decisions on all submissions for a meeting.

Applicable Users:

- RevCom Administrator

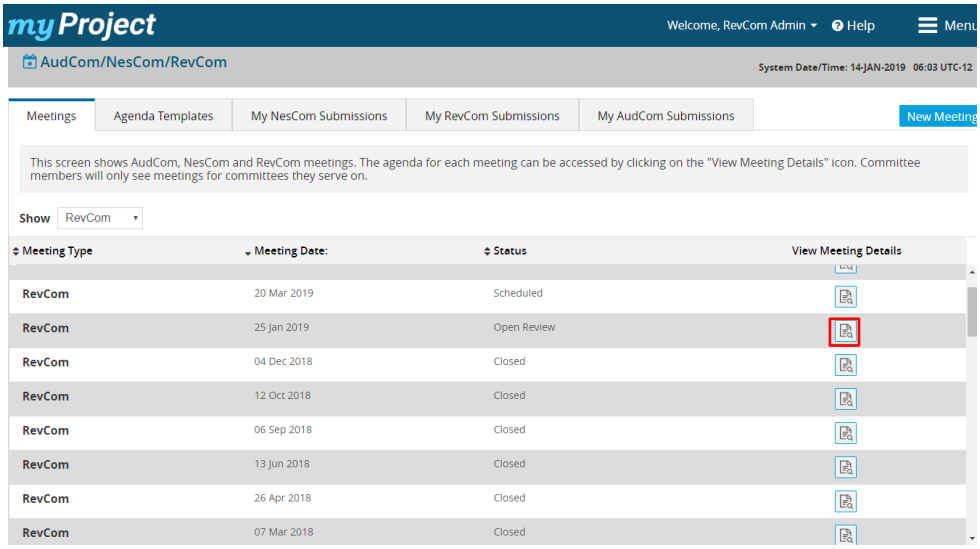
Notes:

- If approval of a standard supersedes all previous standards, this can be indicated during the SASB Approval process.

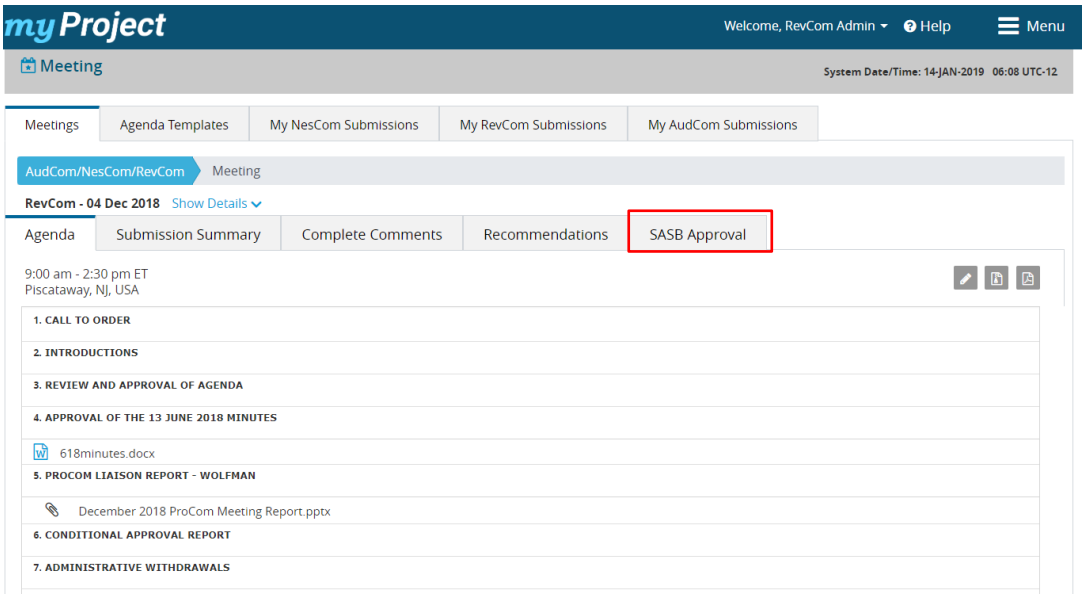
Instructions:

1. On the **myProject** Home Screen click **Menu**.
2. Click **AudCom/NesCom/Rev/Com**.
3. Locate the meeting with submissions for which you wish to record SASB decisions.

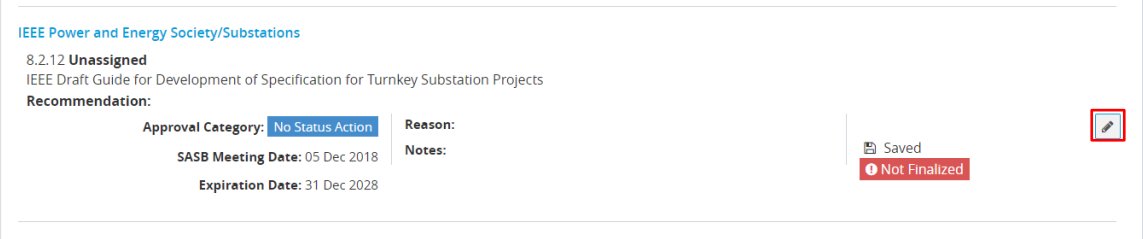
4. Click on the **View Meeting Details** icon.



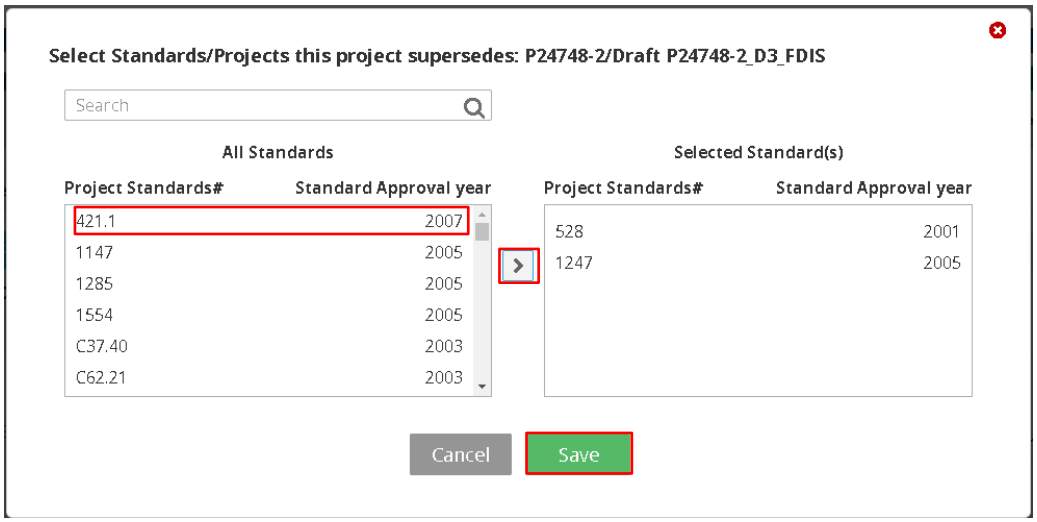
5. Click on the **SASB Approval** tab.



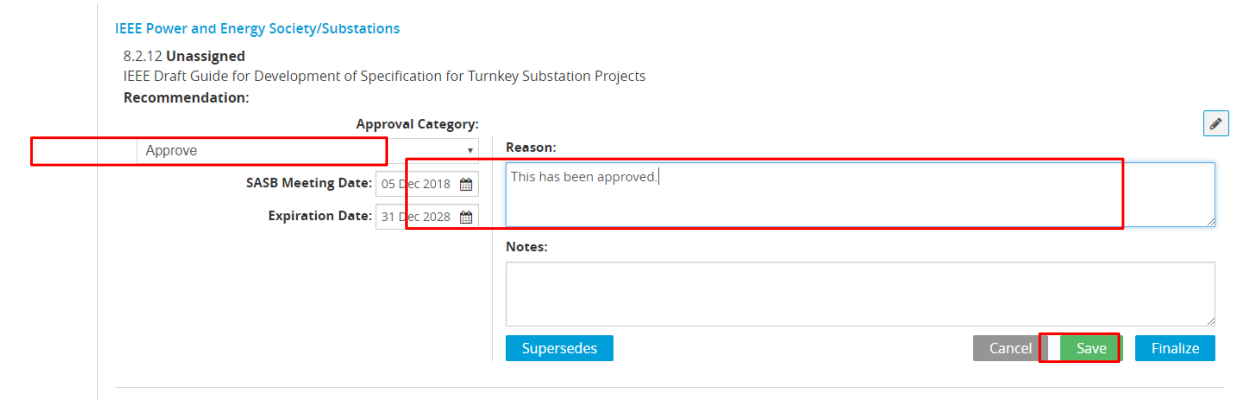
6. Locate the item you wish to record SASB approval for and click the **Edit** icon.

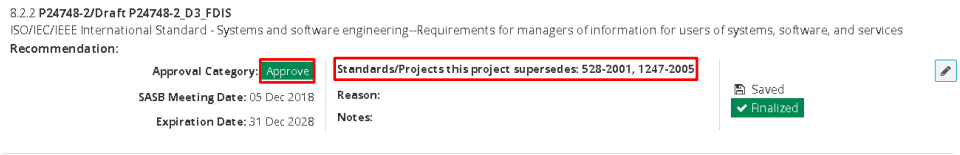


7. Select and approval category from the **Approval Category** dropdown.
    a. **Approve**:
    b. **Conditionally Approve**:
    c. **Defer**:
    d. **Disapprove**:
8. Enter a reason for the category in the **Reason** box and add notes if desired.
9. If this standard supersedes existing standards, click on the Supersedes button.
    a. Use the search tool to locate the standard/s that have been superseded.
    b. In the All Standards box, click on the desired Project Standards number(s) and click the right arrow icon to move it to the Select Standard(s) box.
    c. Click **Save**.



10. Click **Finalize**. The Approval Category will indicate the standard was approved and any superseded standards or projects will be displayed.


IEEE Power and Energy Society/Substations
8.2.12 Unassigned
IEEE Draft Guide for Development of Specification for Turnkey Substation Projects
Recommendation:
Approval Category:
Approve
SASB Meeting Date: 05 Dec 2018
Expiration Date: 31 Dec 2028
Reason:
This has been approved.
Notes:
Supersedes
Cancel
Save
Finalize


8.2.2 P24748-2/Draft P24748-2_D3_FDIS
ISO/IEC/IEEE International Standard - Systems and software engineering--Requirements for managers of information for users of systems, software, and services
Recommendation:
Approval Category: Approve
SASB Meeting Date: 05 Dec 2018
Expiration Date: 31 Dec 2028
Standards/Projects this project supersedes: 528-2001, 1247-2005
Reason:
Notes:
Saved
Finalized

7.3.15.1 Supersede a Standard during SASB Approval

If approval of a standard supersedes all previous standards, this can be indicated during the SASB Approval process.

Applicable Users:

- RevCom Administrator

Instructions:

1. On the **myProject** Home Screen click **Menu**.
2. Click **AudCom/NesCom/Rev/Com**.
3. Locate the meeting with submissions for which you wish to record SASB decisions.
4. Click on the **View Meeting Details** icon.

8 View/Manage Standards Committee P&Ps

8.1 Upload & Manage Standards Committee or Working Group P&Ps

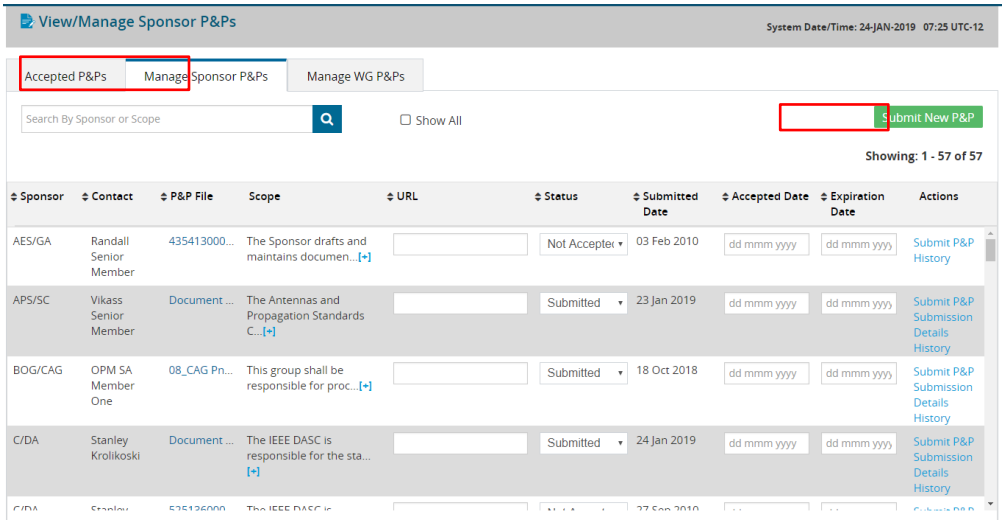
In order to submit PARs, Standards Committee Committees must have approved P&Ps (Policies and Procedures) on file. P&Ps can be submitted and status monitored through **myProject**. Working Groups may be requested to submit P&Ps, although regular approval is not necessary.

Applicable Users:

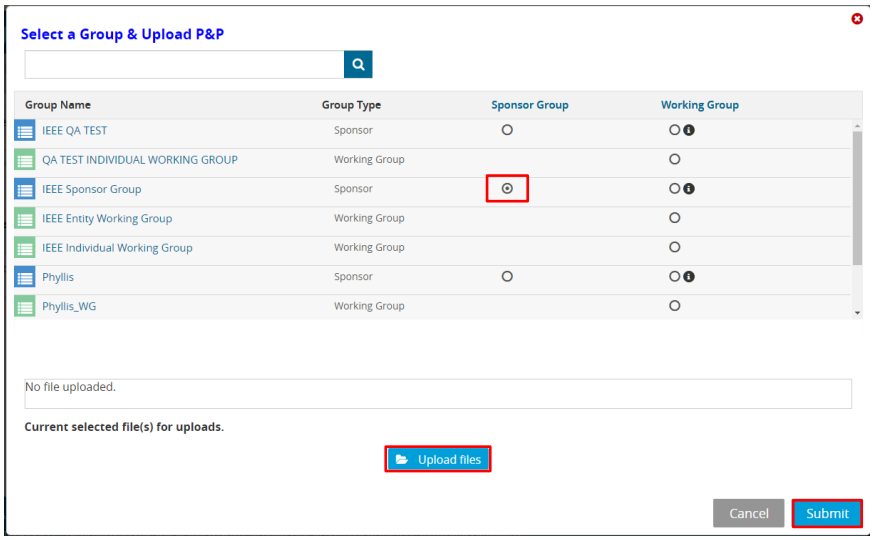
- Standards Committee Chair, Standard Representative, Working Group Chair/Vice-Chair/CO-Chair, AudCom Admin

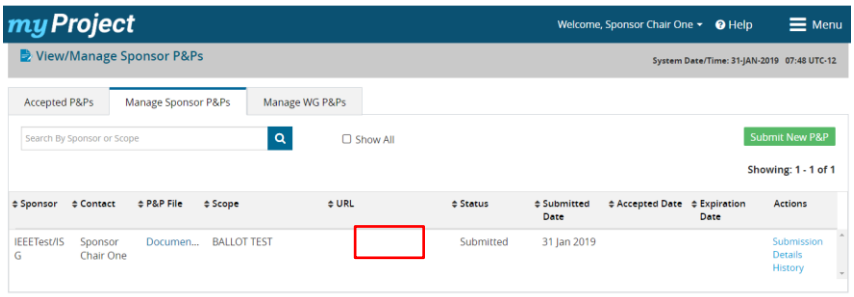
Instructions:

1. On the **myProject** Home Screen, click **Menu**.
2. Click **View/Manage Standards Committee P&Ps**. By default, the Accepted P&Ps tab will appear, displaying all accepted P&Ps.
3. Click the **Manage Standards Committee P&Ps tab**. The status of all submitted P&Ps can be seen on this screen including submission, acceptance and expiration dates.
4. Click **Submit New P&P**.



5. Click the appropriate **Standards Committee Group** or **Working Group.**
6. Click **Upload files** and upload the P&P file from your computer.
7. Click **Submit**. The newly submitted P&P will be displayed with a status of “submitted” until it is approved by the AudCom Administrator.




myProject
Welcome, Sponsor Chair One
Help
Menu
View/Manage Sponsor P&Ps
System Date/Time: 31-JAN-2019 07:48 UTC-12
Accepted P&Ps
Manage Sponsor P&Ps
Manage WG P&Ps
Search By Sponsor or Scope
Show All
Submit New P&P
Showing: 1 - 1 of 1
Sponsor
Contact
P&P File
Scope
URL
Status
Submitted Date
Accepted Date
Expiration Date
Actions
IEEETest/ISG
Sponsor Chair One
Documen...
BALLOT TEST
Submitted
31 Jan 2019
Submission
Details
History

8.2 *Assign Reviewers to a P&P (Admin)*

Applicable Users:

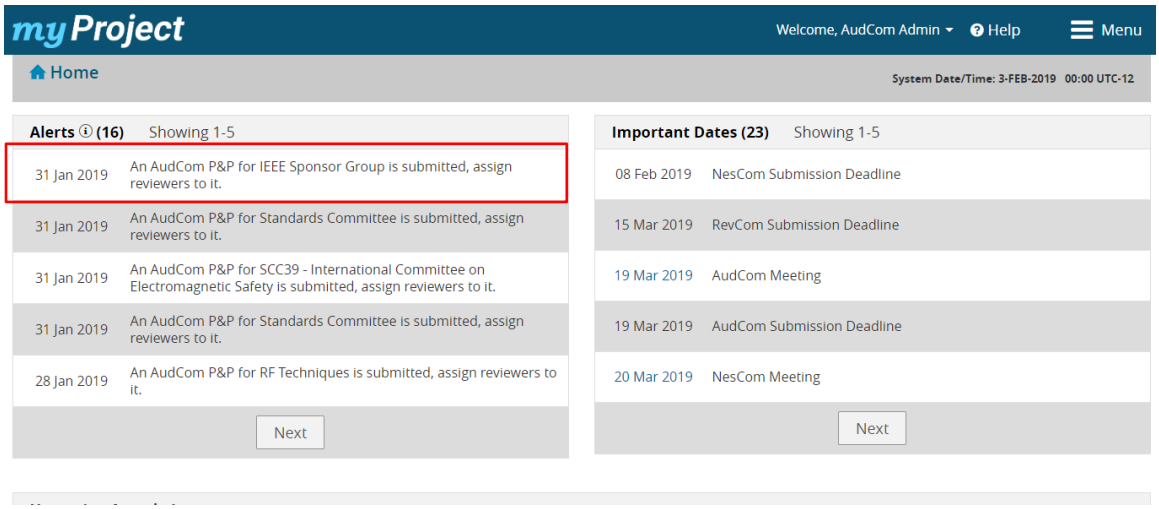
- AudCom Administrator

Notes:

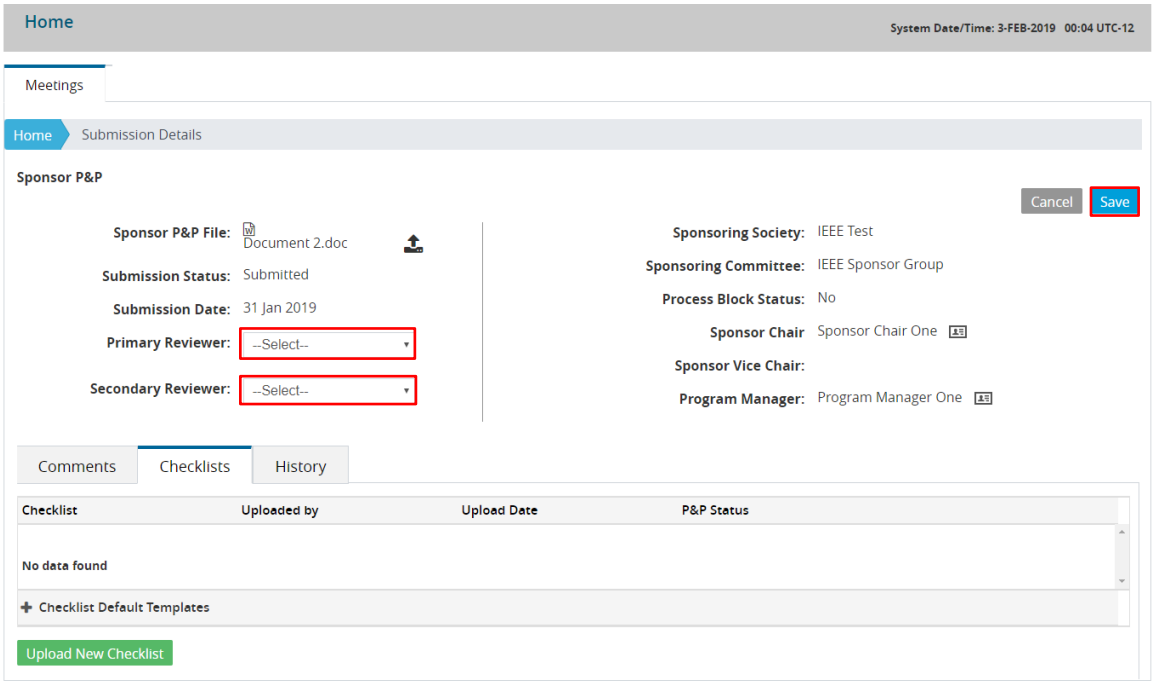
- The AudCom Admin will receive an alert that a P&P has been submitted.

Instructions:

1. On the **myProject** Home Screen, click on the alert that indicates a P&P has been submitted.



2. On the Submissions Details screen, click the **Edit Standards Committee P&P icon**.
3. Choose a **Primary** and **Secondary** Reviewer from the drop down lists
4. Click **Save.**



8.3 Upload a Checklist

Applicable Users:

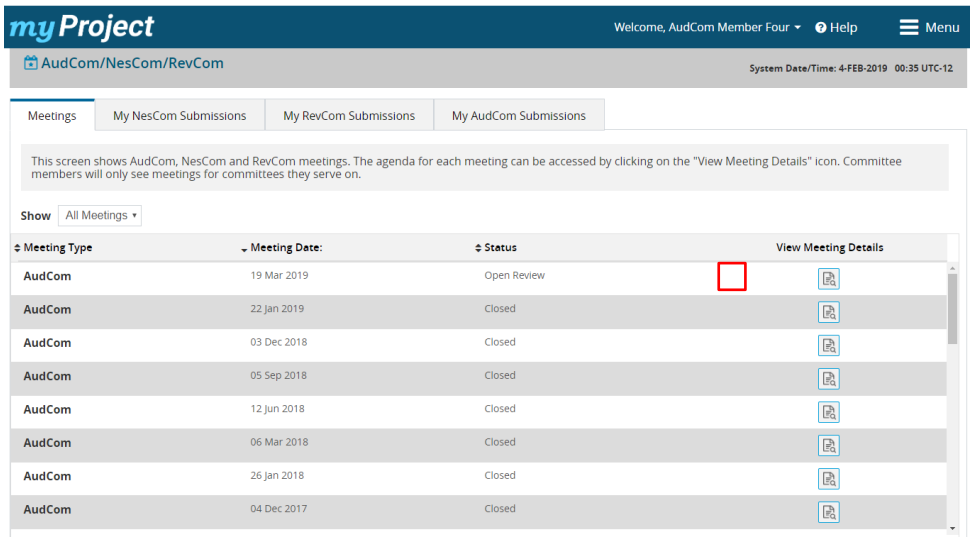
- AudCom Member

Notes:

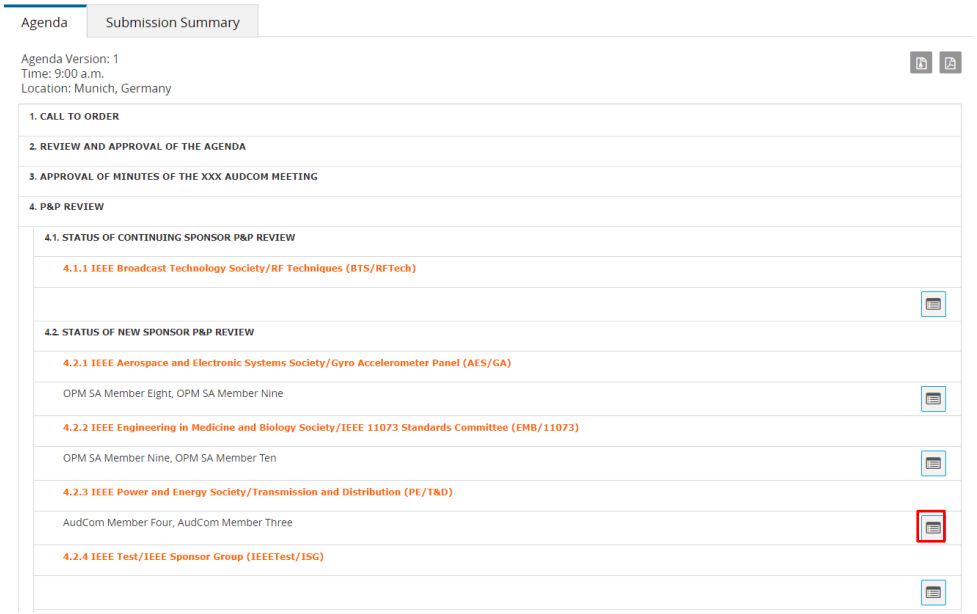
- You will only be able to upload checklists for P&Ps to which you have been assigned as a reviewer by the AudCom Administrator.
- It is recommended that you only upload checklists if you have been assigned as the **primary** reviewer.

Instructions:

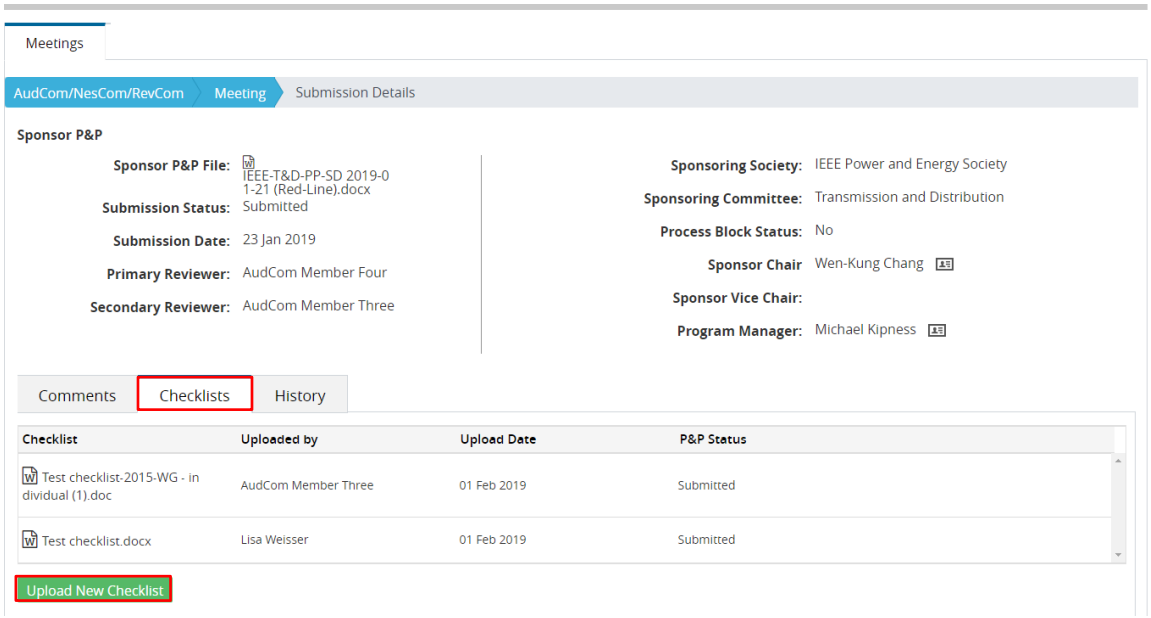
1. On the **myProject** Home Screen, click **Menu**.
2. Click **AudCom/NesCom/RevCom**.
3. Click on the **View Meeting Details** icon next to appropriate meeting. The meeting agenda will load.



4. In the P&P Review section of the agenda, locate the P&P you wish to review.
5. Click the **Submission Details** icon to the right of the P&P.

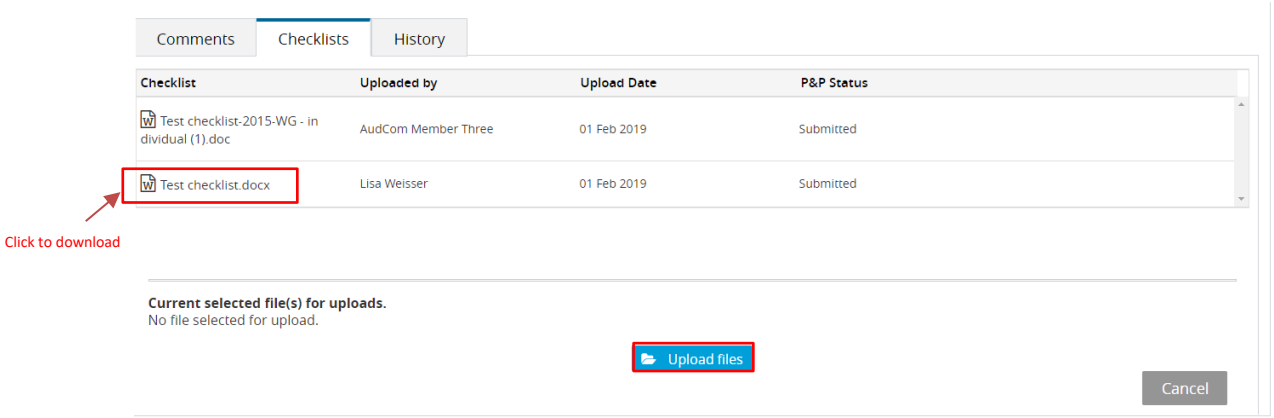


6. Click the **Checklists** tab.
7. Click **Upload New Checklist**.



8. Click **Upload Files** to upload the checklist.

NOTE: Click on the name of an existing checklist to download it to your computer.



8.4 Make and Reply to Comments on a P&P

Applicable Users:

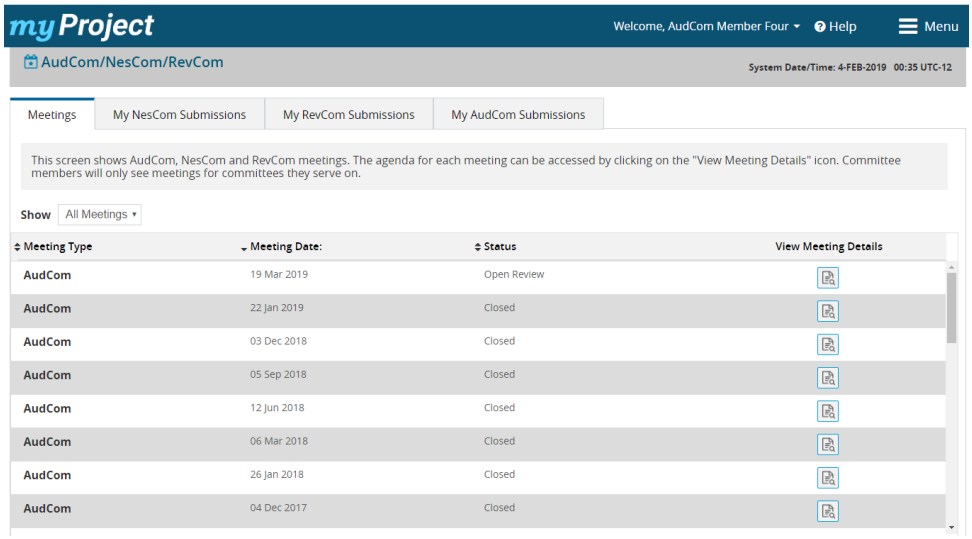
- AudCom Member, Chair, AudCom Admin, SA Staff User

Notes:

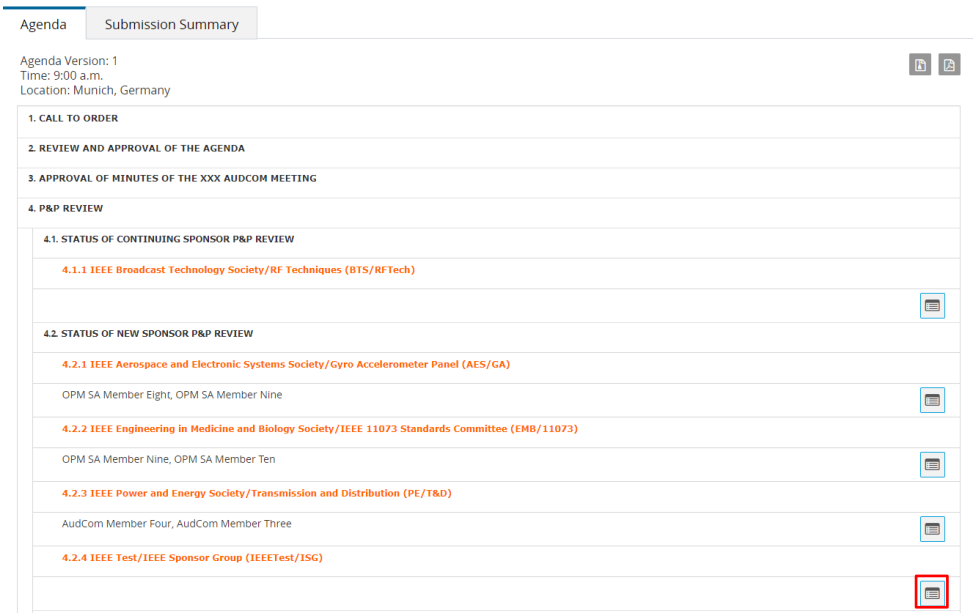
- Comments made by AudCom members require approval by the AudCom Admin

Instructions:

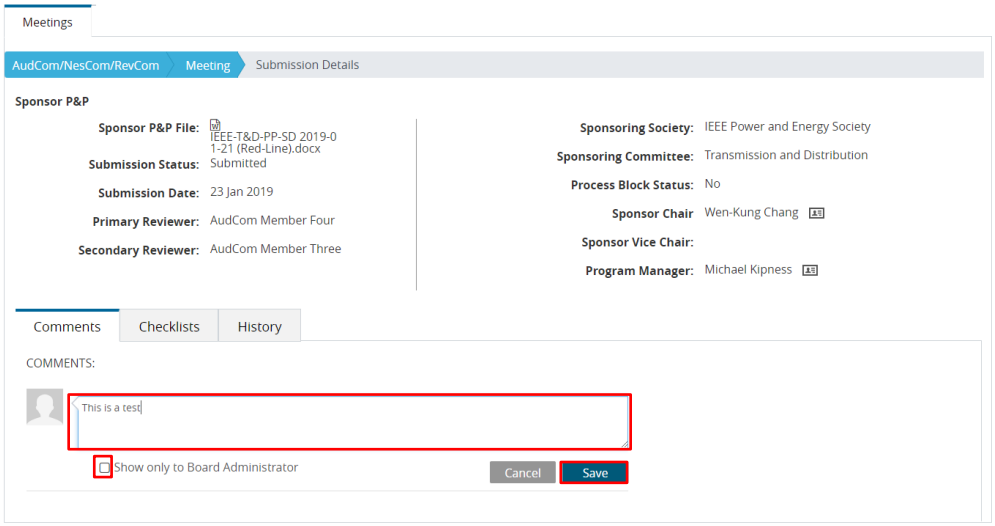
1. On the **myProject** Home Screen, click **Menu**.
2. Click **AudCom/NesCom/RevCom**.
3. Click on the **View Meeting Details** icon next to appropriate meeting. The meeting agenda will load.



4. In the P&P Review section of the agenda, locate the P&P you wish to review.
5. Click the **Submission Details** icon to the right of the P&P.



6. Click the **Comments** tab.
7. Type your comment in the comments field. Click **Show only to Board Administrator** if you want to prevent the comment from being seen by anyone other than the Board Admin.
8. Click **Save**.



8.4.1 *Standards Committee Chair Respond to AudCom Comments*

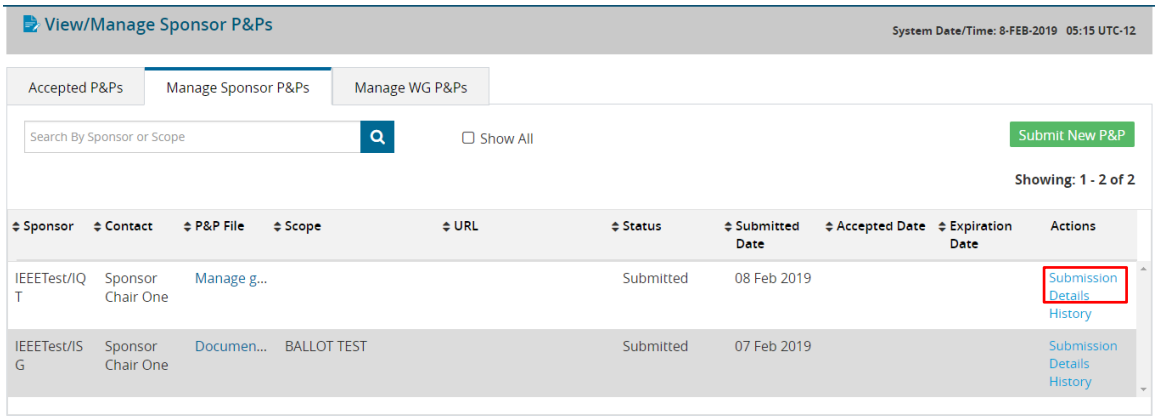
After an AudCom reviewer has commented on a P&P and the AudCom Admin has approved the comment, the Standards Committee chair can respond to the comment.

Applicable Users:

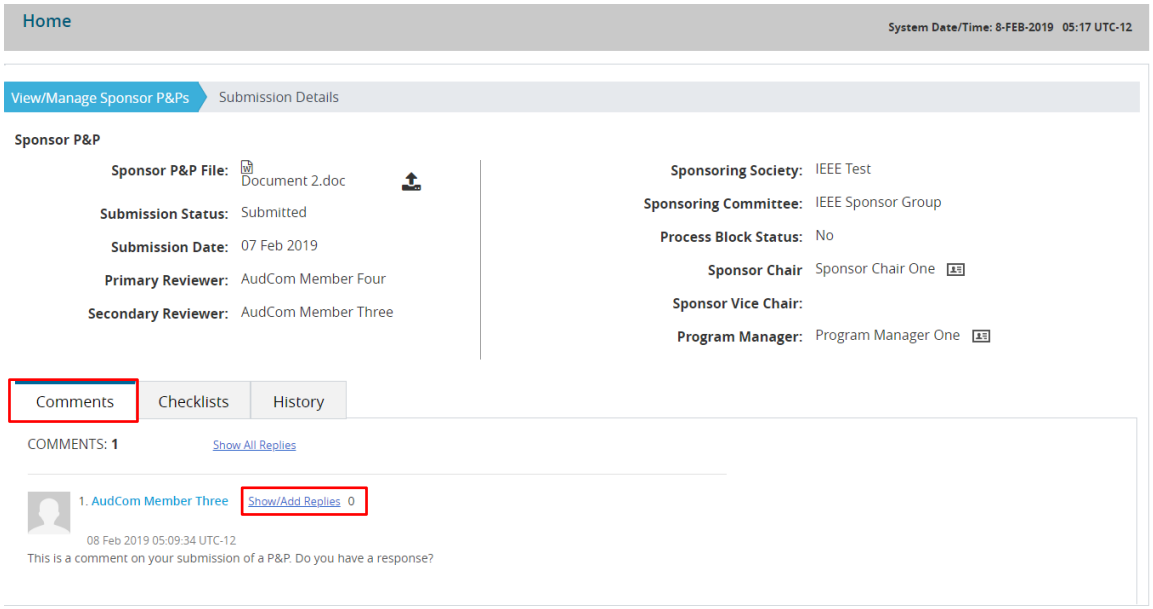
- Standards Committee Chair, Work Group Chair

Instructions:

1. On the **myProject** Home Screen, click **Menu**.
2. Click **View/Manage Standards Committee P&Ps**. The Accepted P&Ps tab will display.
3. Click the **Manage Standards Committee P&Ps** tab.
4. Use the **Search by Standards Committee or Scope** field to locate the P&P you want to respond to comments on.
5. Click the **Submission Details** link.



6. Click on the **Comments** tab.
7. Click **Show/Add Replies** and enter your comment.
8. Click **Save**.



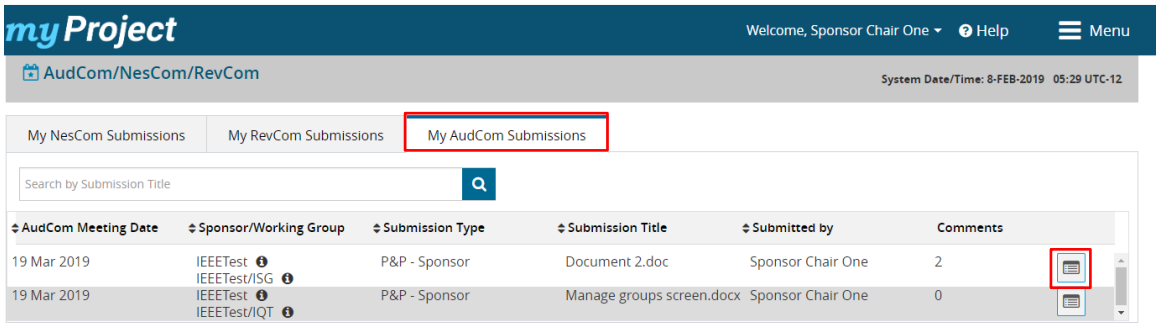
8.4.2 *Standards Committee Chair download checklist and upload new P&P docs*

Applicable Users:

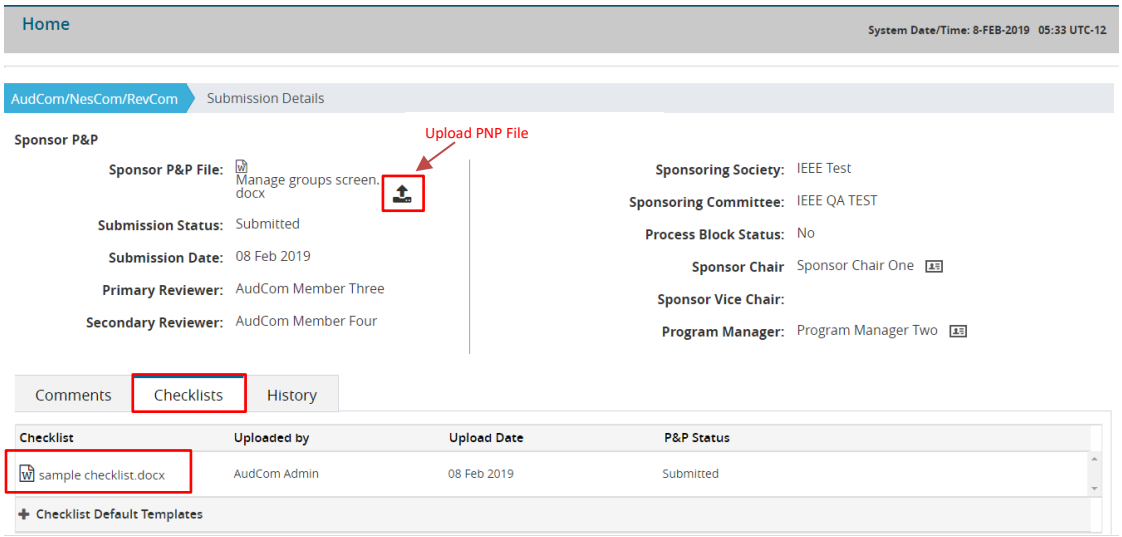
- Standards Committee Chair

Instructions:

1. On the **myProject** Home Screen, click **Menu**.
2. Click **AudCom/NesCom/RevCom**.
3. Click the **My AudCom Submissions** tab.
4. Use the **Search by Submission Title** field or sort by column to locate the P&P.
5. Click the **View** icon.



6. Click the **Checklists** tab.
7. Click on the **name of the checklist** to download.



8. To upload a new or updated P&P, click the **Upload PNP** icon next to Standards Committee P&P File near the top of the screen.

8.4.3 *Manage Standards Committee P&Ps/Change Status*

Applicable Users:

- AudCom Administrator

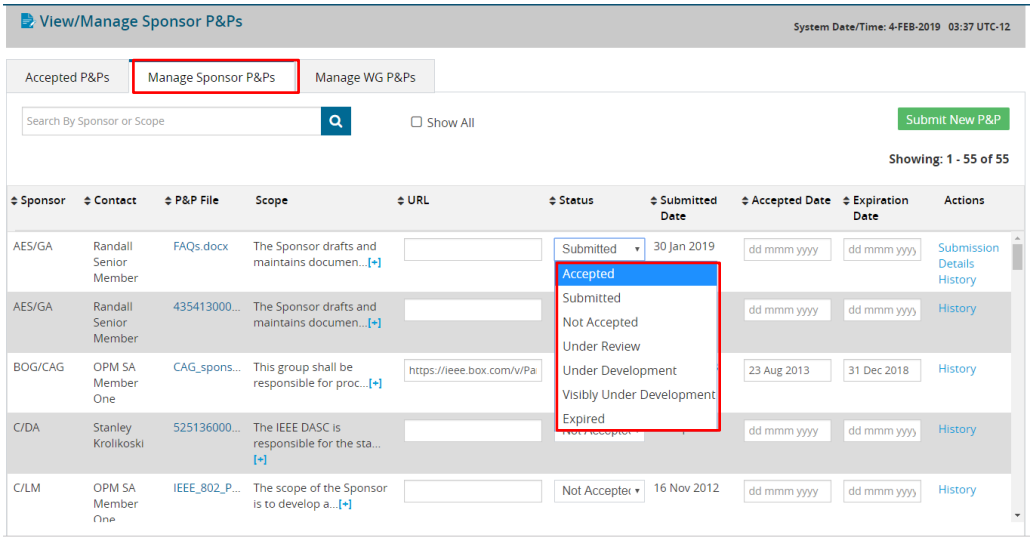
Notes:

- If you are changing the status of a P&P to "Accepted", you will need to upload the P&P to an external website and add the URL as well as enter "Accepted On" and "Expires On" dates.

Instructions:

1. On the **myProject** Home Screen, click **Menu**.
2. Click **View/Manage Standards Committee P&Ps**. The Accepted P&Ps tab will display.
3. Click the **Manage Standards Committee P&Ps** tab.
4. Use the **Search by Standards Committee or Scope** field to locate the P&P you want to change the status of.

5. Use the **Status** drop down list to change the status of the P&P.



9 PARs and Standards Reports

myProject provides users with a robust reporting tool that can be used to search for and download detailed information about active and completed projects as well as approved standards.

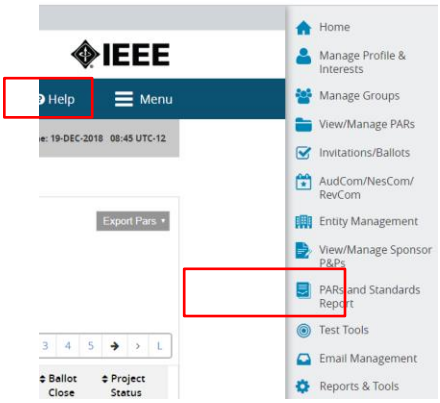
9.1 PARs Reports

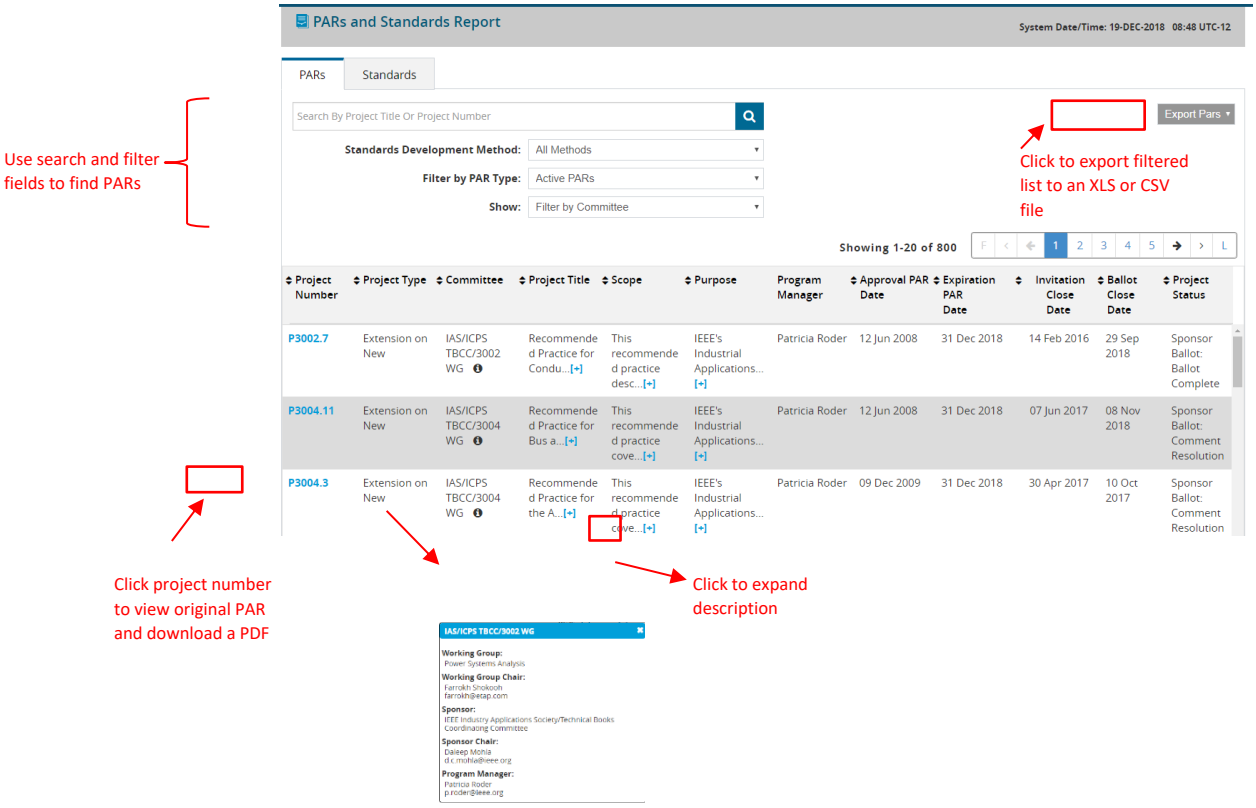
Applicable Users:

- All myProject users

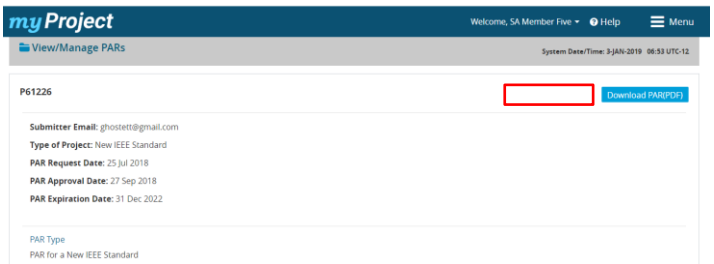
Instructions:

1. On the **myProject** Home Screen, select **Menu.**
2. Click on **PARs and Standards Report**. The PARs tab will appear.





a) Use the search bar and search drop down menus to locate the PAR.
b) Click the number of the PAR to see the original PAR and download a PDF.



c) Click **Export PARs** to export a list of all PARs to an Excel or PDF file.

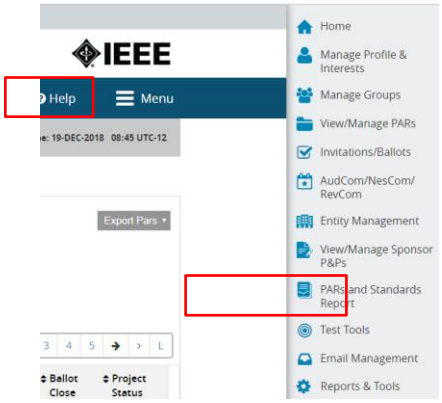
9.2 Standards Reports

Applicable Users:

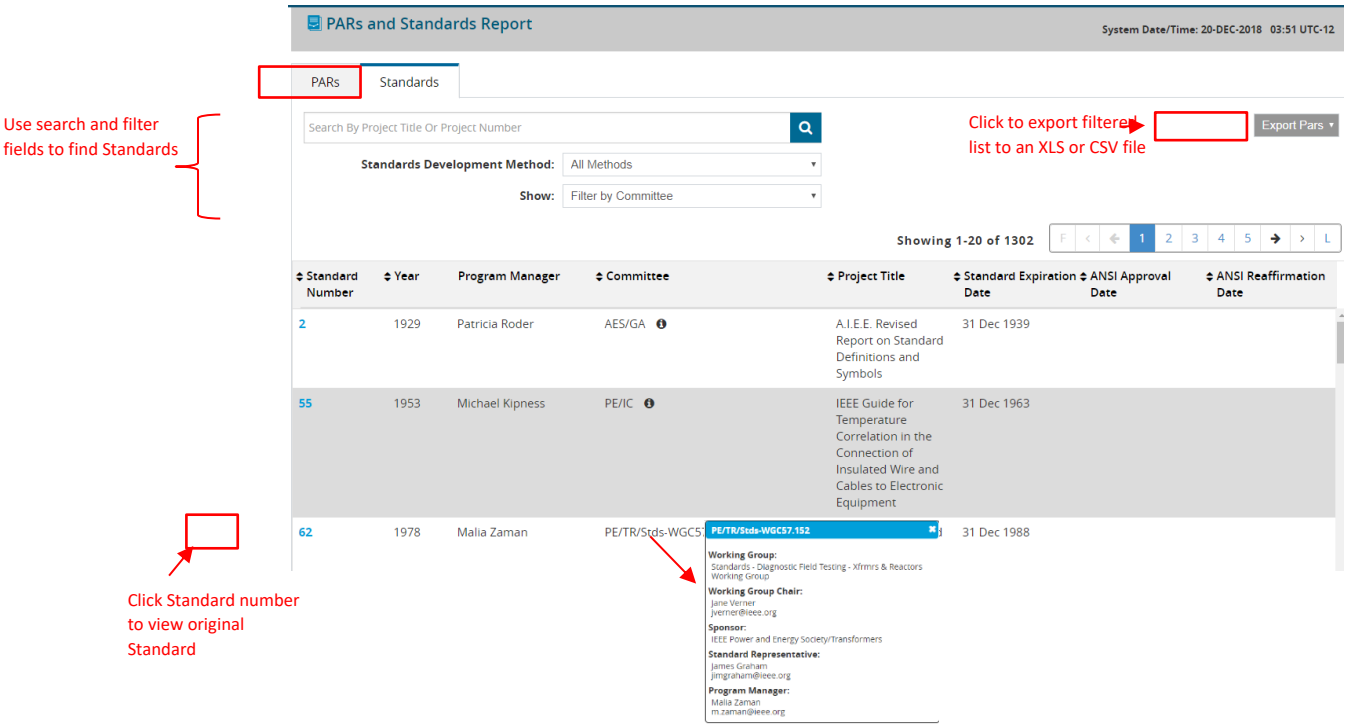
- All myProject users

Instructions:

13. On the **myProject** Home Screen, select **Menu.**
14. Click on PARs and Standards Report. The PARs tab will appear.



15. Click on the **Standards** tab.



a) Use the search bar and search drop down menus to locate the Standard.
b) Click the number of the Standard to see the original Standard and download a PDF.

10 User Roles

10.1 Volunteer User Roles

General User - This is default user type if a user is not an IEEE SA member and has not been given any additional authority. As a general user, you can:

- Register as interested in a Standards Committee, Working Group or Project and be assigned an involvement level
- View Active PARs, Standards Committee P&Ps and Society-Program managers
- Create a PAR (but not submit)
- Send a message to a Standards Committee
- Join a single Ballot and vote/comment on that ballot (for a fee)
- View all ballot and invitation history
- Access membership information
- Send a message to the balloting center
- Enroll as DR/DRA or EBR/EBRA (if employed by an Entity Member Organization)

IEEE SA Member – IEEE SA Members can:

- Register as interested in a Standards Committee, Working Group or Project and be assigned an involvement level
- View Active PARs, Standards Committee P&Ps and Society-Program managers
- Submit a PAR
- Send a message to a Standards Committee
- Join a Ballot
- Vote/Comment on a ballot
- Send a message to the balloting center
- Enroll as DR/DRA or EBR/EBRA (if employed by an Entity Member Organization)

Standards Committee Chair/Standard Representative – Standards Committee Chairs/Standard Representatives have all abilities of IEEE SA Members plus:

- Accept/Reject a PAR
- Manage Roster involvement for Standards Committee, Working Groups and Projects
- Manage Officers for Standards Committee, Working Groups and Projects (only Standards Committee Chair can manage Standard Representative)
- Send notifications to a Group (Standards Committee, Working Group)
- Initiate Ballot Invitation Requests
- Submit a draft for MEC
- Initiate a Standards Committee Ballot
- Initiate Recirculation
- Manage Misc Coordination

- View Invitations
- Replace Drafts for Balloting
- View ballot Activity and respond to comments
- Submit Rogue Comments
- Prepare for RevCom Submission
- Send Notifications to Balloting Groups

Working Group Chair/Officer – Working Group Chairs/Officers have all abilities of IEEE SA Members plus:

- Manage Roster involvement for Standards Committee, Working Groups and Projects
- Manage Officers for Standards Committee, Working Groups and Projects (Chair/Co Chair/ Vice-Chair Only)
- Send notifications to the Working Group
- Initiate Ballot Invitation Requests
- Submit a draft for MEC
- Initiate a Standards Committee Ballot
- Initiate Recirculation
- Manage Misc Coordination
- View Invitations
- Replace Drafts for Balloting
- View ballot Activity and respond to comments
- Submit Rogue Comments
- Prepare for RevCom Submission
- Send Notifications to Balloting Groups

Designee – Designees (Standards Committee Ballot Designee, Nescom Designee, Revcom Designee, Coordination Designee) will have all abilities of IEEE SA Members plus access to features relevant to performing their specific function.

EMR – Entity member Representatives will have all abilities relevant to their personal roles plus:

- Manage Representatives for the Entity (DR/DRA)

DR/DRA – Designated Representatives/Alternates will have all abilities relevant to their personal roles plus:

- Participate in Entity Working Groups

EBR/EBRA – Entity Ballot Representatives/Alternates will have all abilities relevant to their personal roles plus:

- Vote/Comment on Entity Ballots

Technical Editor – This is a designation given to all Standards Committee and Working Group officers as well as anyone who has been given the "Technical Editor" role at the Standards Committee, Working Group or Project level. Technical editors will be given access to the Standards Dictionary.

10.2 Staff User Roles

Below are the Staff user roles that are available in myProject.

General/Other Staff – This is the default user type for staff. All staff users have the ability to:

- Create a PAR (can create and edit but not submit)
- View all PARs/Projects
- NesCom Member Area (will appear if individual is added to board roster)
- AudCom Member Area (will appear if individual is added to board roster)
- Manage Activity Profile (register as interested in a Standards Committee, Working Group or Project and be assigned an involvement level)
- Manage Committees (view roster with roles and involvement only)
- Manage Organizations (read only)
- View Standards Committee P&Ps
- View L50S status
- View International Activity
- View Individuals
-
- Send Broadcast Notification
- Send Standards Committee Message
- View Program managers
- View Active PARs
- Send a Change Request Form
- Send Notification to Group
- Manage Help Links
- Act as User
- View Ballot and Invitation History
- Maintain approved voter classifications
- View Ballot Activity
- Send Notification to Balloting Groups
-

Governance Staff – Governance Staff have all general staff abilities plus:

- Manage Committees (edit and add)
- Manage Invited Experts
- Manage Board members
    - If made a board administrator, can create/edit meeting agendas and moderate comments for that board
- Review EProjects Files
- Manage Coordination Users

- View Authorized Ballot Designees

International Staff – International Staff have all general staff abilities plus:

- Edit International Activity Information

Ballot Center Staff – Ballot Center Staff have all general staff abilities plus:

- Override IEEE/SA Membership Status
- Terminate/Reset Standards Committee Ballot
- Manage Coordination Users
- View Authorized Ballot Designees
- Manage Ballot Notification Boilerplate Text

Project Management Staff – Project Liaison Staff have all general staff abilities plus:

- Manage Committees (edit and add)
- Review ballot invitations
- Review ballot recirculations
- Review Standards Committee drafts
- Manage Coordination Users
- View Authorized Ballot Designees

Financial Staff – Financial staff have all general staff abilities plus:

- Issue L50S notices
- Edit L50S information
- Place a L50S process block

Project Admin Staff – Project Admin Staff have all general staff abilities plus:

- Review EProjects Files

- **Error! Reference source not found.**)

Editorial Staff – Editorial Staff have all general staff abilities plus:

- Review EProjects Files
- Make Coordination Comments

ODB Staff – These are system administrators. ODB Staff have **all other staff role abilities** plus:

- Change Role Display Name
- Manage Staff Users
- Manage Process Parameters

11 Glossary

Activity Area	A group of people with a common technical interest such as a Working Group, Standards Committee, or project, joining an Activity Area is open to the public and merely expresses interest
Affiliation	An individual or entity that has been, or will be, financially or materially supporting an individual's participation in a particular IEEE standards activity, this is not necessarily the same as an employer
AudCom	Oversees the standards development activities of Societies, their standards-developing entities, and the Standards Coordinating Committees (SCCs) of the IEEE SA Standards Board
Ballot	See Standards Committee Ballot
Ballot Group	The list of individuals or entities formally approved to cast a yes/no/abstain vote during a ballot
Committee	A generic term referring to any group of people with a leader (e.g. Working Group, Study Group, Standards Committee Executive Committee, SASB standing committee, adhoc, etc.)
CSM	Client Services Manager, an IEEE SA staff member responsible for facilitating funded projects
CSV	Comma Separated Value, a file format that can be edited by spreadsheet programs like MS Excel
DR/DRA	Designated Representative/Designated Representative Alternate, the individual responsible for representing an Entity Member organization in an entity Working Group

EBR/EBRA	Entity Ballot Representative/Entity Ballot Representative Alternate, the individual responsible for representing an Entity Member Organization by casting a vote in a specific entity ballot
EMR	Entity Member Representative, the individual responsible for managing representatives of an Entity member Organization
Entity Member	Membership in the IEEE SA by a company or other organization, only one vote may be cast by a single entity in an entity ballot
IEEE Account	A single web account used for all IEEE web services
IEE-SA	The IEEE Standards Association, the division of the IEEE responsible for creating and maintaining standards
Interested Party	An individual who has expressed an interest in the activities of an Activity Area, does not imply higher Involvement Levels in the area; this is a self-assigned level of involvement and cannot be removed by anyone other than the individual him/herself
Involvement Level	The classification of a user's involvement within a committee (e.g. Interested Party, Observer, Non-Voting Member, Voting Member)
MEC	Mandatory Editorial Coordination, required review by staff to verify all legal, copyright and other editorial matters related to a draft
myProject	A set of web-based tools that facilitate the IEEE standards process
NesCom	New Standards Committee, serves as the gatekeeper for new and revised standards, recommending the approval of new or revised standards requests to the Standards Board
NesCom Administrator	IEEE SA staff member responsible for facilitating activities of NesCom

Officer	Any member of a committee with a special role, e.g. Chair, Designee, Secretary
PAR	Project Authorization Request, PARs are used to authorize work on a new standard or revision to an existing standard
PDF	Portable Document Format, a file format used for sharing documents
Project	Projects are initiated when a PAR is submitted, a working group can be responsible for several projects
Recirculation	An additional round of voting on a Standards Committee Ballot
RevCom	Review Committee, recommends the approval of standards to the Standards Board
Rogue Comment	A comment received on a Standards Committee ballot from someone outside of the balloting group or outside of the ballot or recirculation period
SASB	The IEEE SA Standards Board
Society	IEEE technical societies
Standards Committee	An entity authorized by the IEEE SA Standards Board per the IEEE SA Standards Board Bylaws to submit a PAR or conduct a Standards Committee Ballot. This includes, but is not limited to, Society Standards Committees (e.g. C/LM or C/MMSC), Standards Coordinating Committees, the Corporate Advisory Group and IEEE Councils such as the Nanotechnology Council.
Standards Committee Ballot	The process of conducting the formal consensus ballot (as opposed to the actual yes/no vote that is the actual vote cast by a user)

Standards Committee Ballot Designee	The individual responsible for handling the Standards Committee Ballot activities for a specific project. By default, the Working Group Chair assumes these responsibilities
Standards Committee Chair	The chair of record for a Standards Committee as defined above
Program manager	A member of the IEEE SA staff responsible for guiding Standards Committees and Working Groups through the standards process
Standards Board	Oversees the process and policies that support standards development
Standards Representative	The individual responsible for handling the standards activities within a Standards Committee. By default, the Standards Committee Chair is the Standards Representative.
Voter	An individual authorized to cast a vote on a Standards Committee Ballot
Working Group	A formally recognized organization, usually under a Standards Committee, responsible for the development of one or more standards projects
Working Group Chair	The chair of record for a Working Group as defined above
ZIP	A file format used to combine multiple files into a single, smaller file for purposes of uploading and downloading