

# Receiving an Opportunity Assessment and Sharing it with Team Members (iPM)

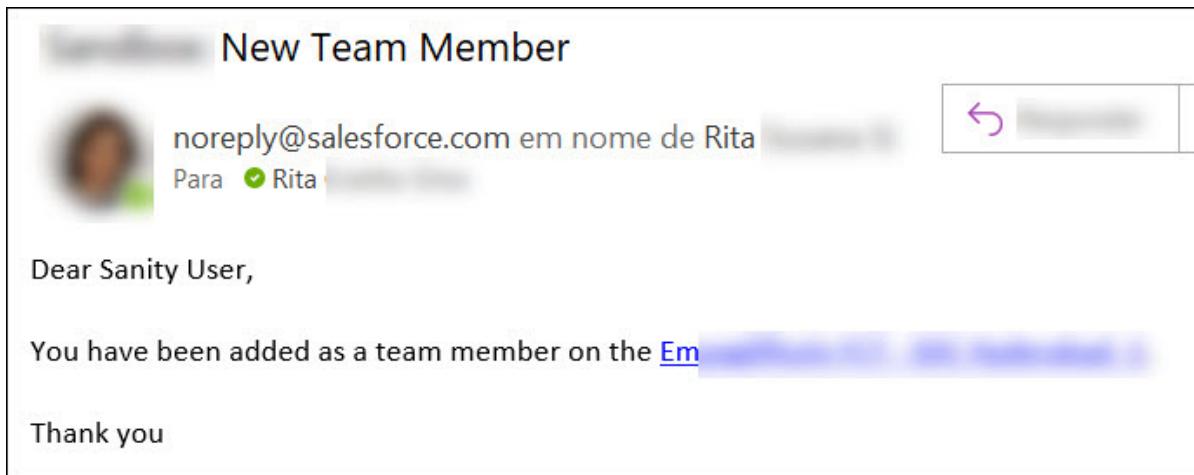
## Learning Objectives

After completing this unit, you'll be able to

- Identify to which Opp D&D you have been added as a Team Member
- Access the Opportunity Assessment you have been assigned to
- Identify all your open assessments
- Give write access to a PSG Quip Document

## Receiving notification of being a Team Member

You as iPM responsible for the Assessment of the Opp D&D will receive when added as a team member added to the Opp D&D, an email notification similar to the one below:



## Receiving an "Opportunity Assessment"

So you have been asked to provide an assessment. You have received an email similar to the one below. What should you do next?

New Feedback

noreply@salesforce.com em nome de Rita [REDACTED]  
Para Rita [REDACTED]

Dear Sanity User,

A new assessment has been created and assigned to you for the Opportunity: Em [REDACTED]

Please click on the link below to view the record or access it on the Feedback Application under Opportunity Assessment lists view.

[Click here](#)

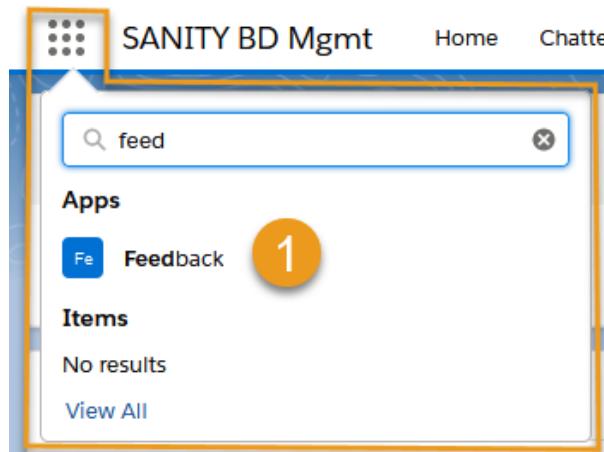
You can simply click on "**Click here**" on the email, and the "Opportunity Assessment" record will open.

## Overview of all your pending Opportunity Assessments

But what if you want to find it yourself on SANITY? We have created an application where you can find all your queued requests on the homepage.

To find the assessments that are waiting for your feedback, follow the steps:

### 1. Search and open the "**Feedback**" Application



### 2. On the "**Home**" tab

3. You will find the related list "**My Pending Feedback**", where all opportunity assessment records that are waiting for your feedback are listed

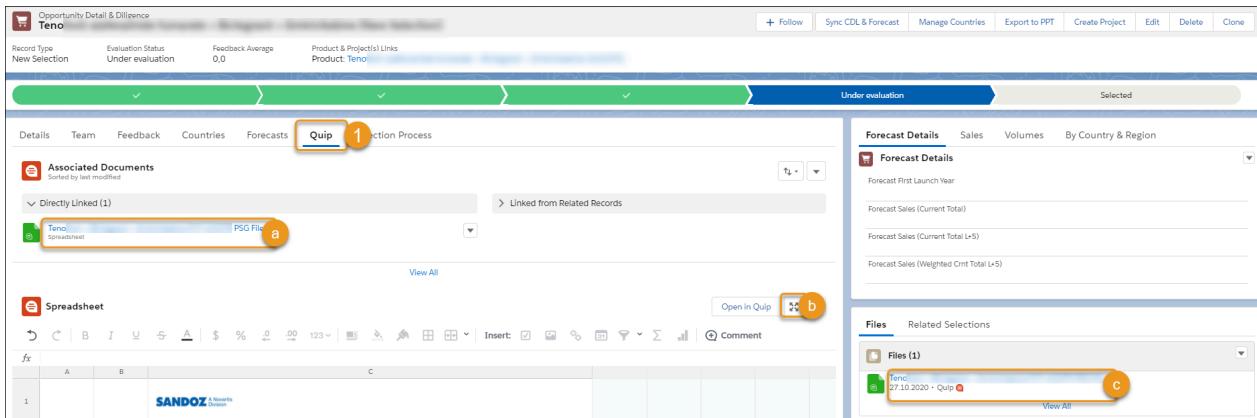
4. Click the assessment name of the record you want to provide feedback for, to open the record

# Giving Write Access to the PSG Quip Document

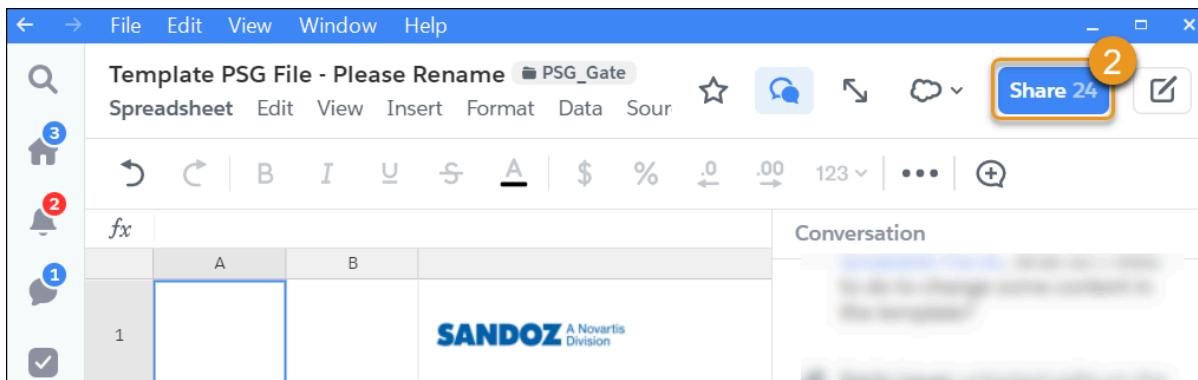
Upon creating the PSG document the GPfM grants writing access to all iPMs, SDC PM Heads, and GPfMs. Also, all associates having SANITY access are granted reading access.

To give “**Write access**” to team members (e.g. respective patent attorney) follow these steps:

1. Go to tab “**Quip**” tab on Opp D&D, and open the PSG doc by either:
  - a. Click on the link under “Associated Documents”
  - b. Click the expand icon on the “Spreadsheet” section
  - c. Click on the link under “Files”



2. Click the “**Share**” button on the top right of the PSG Document



3. Under “**Add People**” type the name of the person you want to give access to
4. Select the “**Edit**” option next to the name
5. Click “**Done**”.

Share

**ADD PEOPLE**

3

Add by name or email

Shared with 84 people  
3 individuals + 1 folder

SHAREABLE LINK

Link sharing is off, so only current members can access this document through its URL. [Copy link](#).

ASSOCIATED SALESFORCE RECORDS ⓘ

1 Associated Record in Sandoz International  
Can Comment [Manage](#)

Unknown Associated Records in Sandoz International  
[Contact your Quip admin for help.](#)

Can Edit ⓘ

4

Full Access  
View, edit and share

✓ Edit  
Can edit, but not share

Comment  
Can only read and comment

Read Only  
Cannot edit or share

5

Done

Well Done! Now the team member is already able to edit the PSG Quip document.