

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

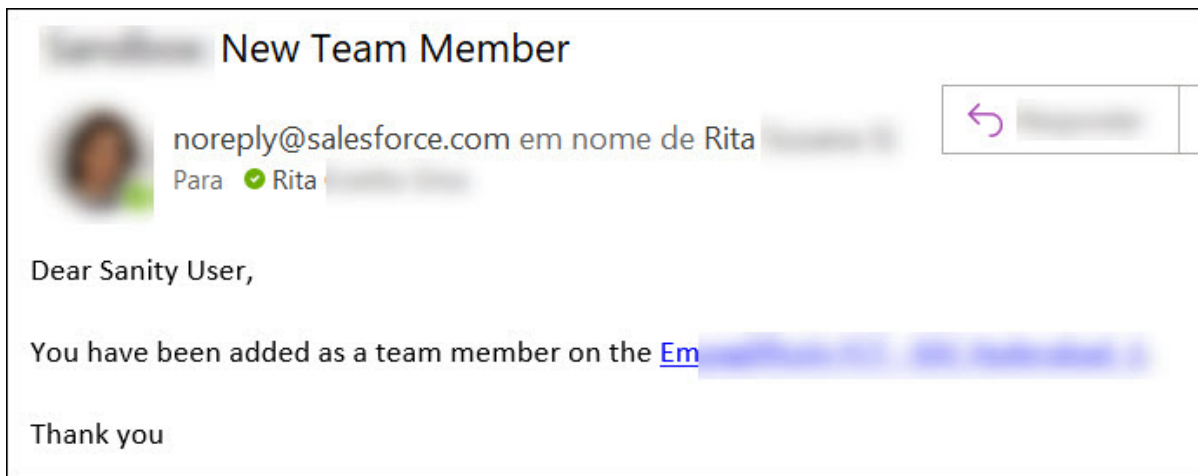
Learning Objectives

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

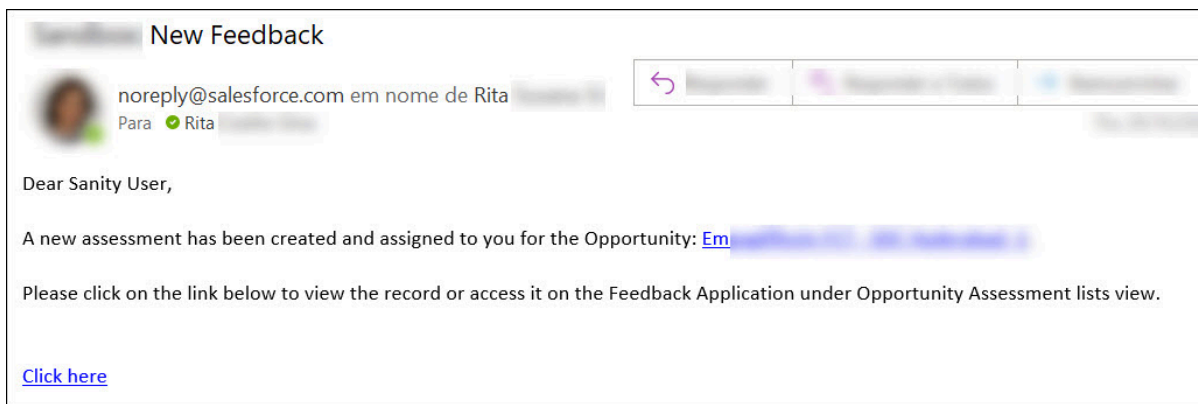
Receiving notification of being a Team Member

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?



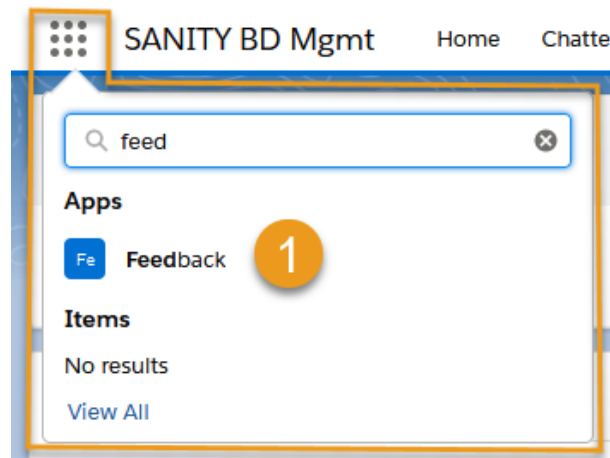
You can simply click on "**Click here**" on the email, and the "Opportunity Assessment" record will open.

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:

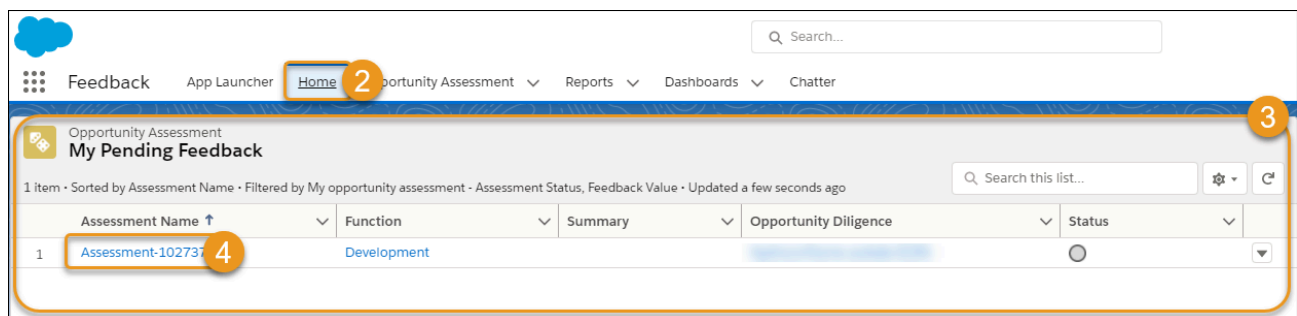
1. Search and open the "**Feedback**" Application



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

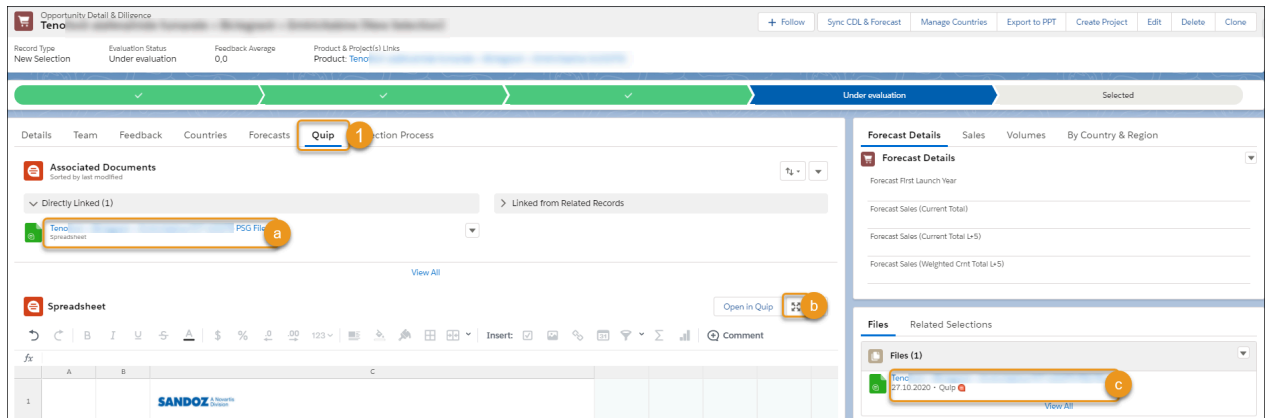


Giving Write Access to the PSG Quip Document

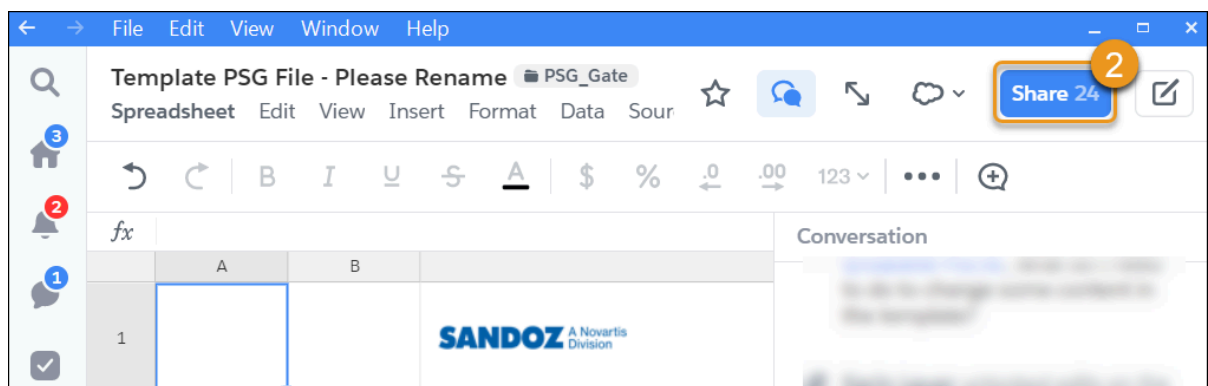
Upon creating the PSG document the GPfM grants writing access to all iPMs, SDC PM Heads, and GPfMs. Also, all associates having SANITY access are granted reading access.

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

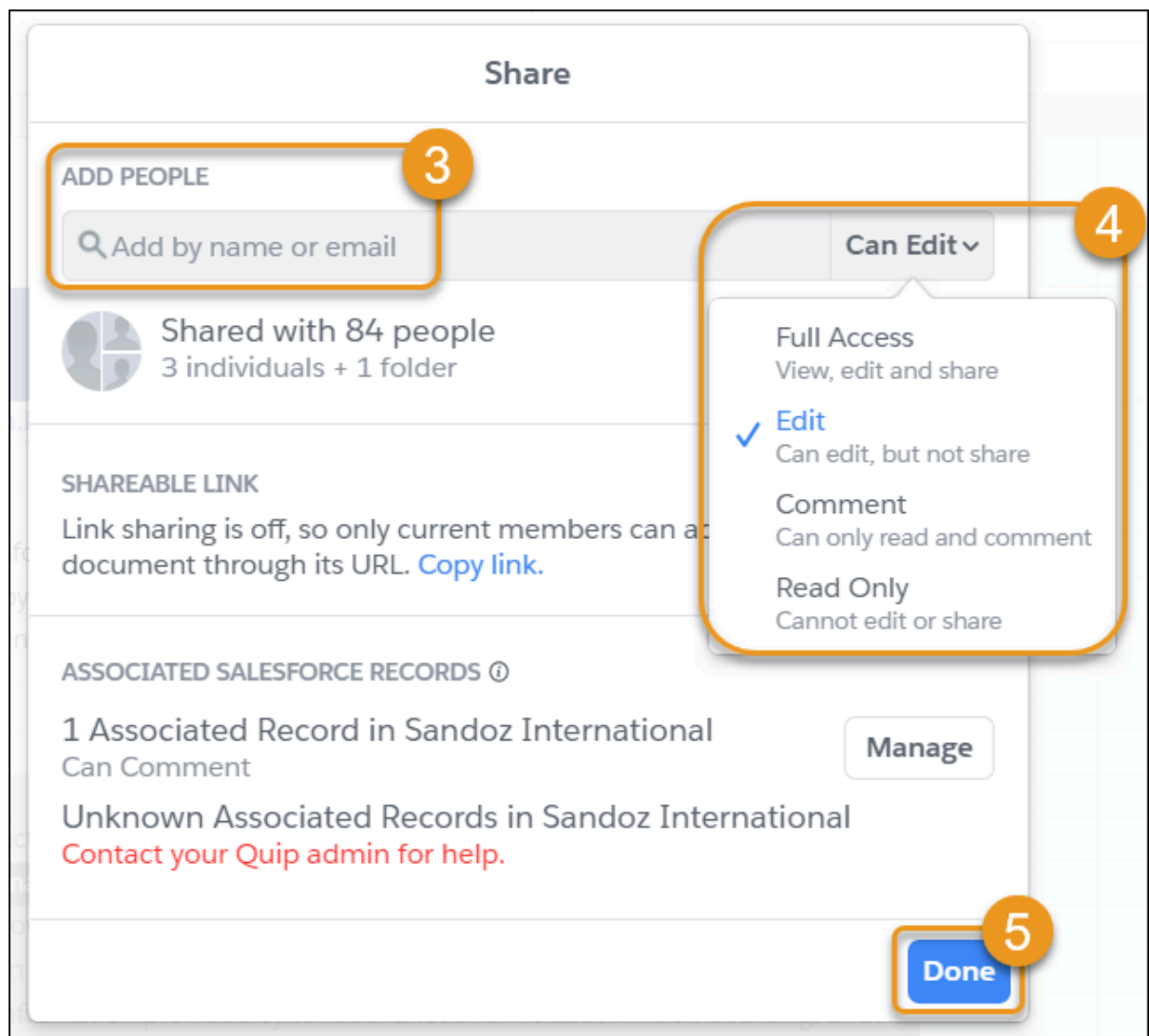
1. Go to tab **"Quip"** tab on Opp D&D, and open the PSG doc by either:
 - a. Click on the link under "Associated Documents"
 - b. Click the expand icon on the "Spreadsheet" section
 - c. Click on the link under "Files"



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"**.



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