Administrative Guideline

Kavi Users Guide

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FOREWORD

Warning
This document is an unpublished, confidential work under development, and shall not be referred to as a SMPTE Administrative Guideline. It is distributed for review and comment; distribution does not constitute publication. Recipients of this document are strongly encouraged to submit their comments to the document editor.

This document has been prepared by SMPTE (the Society of Motion Picture and Television Engineers) Standards Committee (ST).

This fifth version includes the following significant changes to the previous edition:

a) The structure of the document has been changed to conform to ISO Directives Part 2, Edition 7, 2016.
b) Renumbered to conform to ISO Directives.
c) Editorial updates to the entire document.
d) Change Clause 3.5.4.2 to provide instructions to associate documents with Projects.
INTRODUCTION

SMPTE Standards Community uses Kavi Workspace (KWS) web services as the communications interface and repository for all projects and their respective documents for the development and approval of Engineering Documents and Registered Disclosure Documents (RDDs). This “Users Guide” attempts to describe how to navigate this User Interface to allow you to put together Projects, Documents and Ballots to complete your work.

This “Users Guide” was designed to be used as both a starting point for new users and a reference guide to existing users. Feel free to access areas of attention via the Table of Contents or Table of Figures. If you are brand new to Kavi then you might want to start with Section 2. Standards Community Members.

This “Users Guide” is broken into three main sections that address the four main Roles one can hold in the Standards Community. Group Members, Group Secretaries, Document Editors and Chairs. In the usual course of Standards Community membership, most everyone starts out as a Group Member and then may progress to a Group Secretary, Document Editors (DE) or become a Chair of a Group or Committee. Chairs maybe guiding the work of a; Drafting Group (DG), Working Group (WG), Study Group (SG) or a Technology Committee (TC). A TC Chair is the most formal of these efforts and requires special attention to process and procedure. The TC Chair Role is given special permissions within Kavi to accomplish their work such as creating Ballots and modifying Rosters.

As members can have different roles and responsibilities in Standards work, Kavi should expose only the mechanisms to allow that role to perform their work. Other mechanisms are only exposed to Secretaries, Committee Chairs or Document Editors. Other mechanisms are only exposed to the Director of Engineering such as admin rights and responsibilities. There maybe times where work is required and the individual will not be given the proper permissions. Please check with your Chair first to correct the situation. The Chair may need to consult the Director of Engineering from time to time for help or to report bugs.

The SMPTE Director of Engineering works continually with Kavi Corporation in the development of KWS, so this document will be revised from time to time to reflect improvements in KWS.

The steps in approval of an Engineering Document (Standard, Recommended Practice, Engineering Guideline, or Amendment) are described in detail in the Operations Manual v3.01 which can be found on Kavi after you have joined the Standards Community. It is highly recommended to have read and understand this OM before one takes on the role of Document Editor or any Chair position in the Standards Community.

This Standards Administrative Guideline forms an adjunct to the use and interpretation of the SMPTE Standards Operations Manual. In the event of a conflict, the Operations Manual shall prevail.

NOTE: Again with updates to Kavi some URL links provided in this document may no longer work due to changes. The Standards Director of Engineering will attempt to keep this document current however their may be some lag between changes on Kavi and updates to this document.
1 **Scope**

This Administrative Guideline describes the processes and the various workflows that are used to complete work items within the Kavi Workspace.

2 **Normative References**

The following standards contain provisions which, through reference in this text, constitute provisions of this Administrative Guideline. At the time of publication, the editions indicated were valid. All standards are subject to revision, and parties to agreements based on this document are encouraged to investigate the possibility of applying the most recent edition of the standards indicated below.

SMPTE Standards Operations Manual v3.1 Approved by BoG 2015-02-09. Effective 2015-04-04

SMPTE Administrative Guideline AG-02 Engineering Documents

SMPTE Administrative Guideline AG-03 Normative References

SMPTE Administrative Guideline AG-04 Templates

SMPTE Administrative Guideline AG-05 XML Schemas

SMPTE Administrative Guideline AG-06 Kavi New Project Worksheet

SMPTE Administrative Guideline AG-07 Document Flowchart

SMPTE Administrative Guideline AG-08 Patent Statement

3 **Terms and definitions**

No terms and definitions are listed in this document.

ISO and IED maintain terminological databases for use in standardization at the following addresses:

- ISO Online browsing platform: available at [http://www.iso.org/obp]
4 Standards Community Members

This section describes the simple functions required for Standards Community Members. This includes; logging in, resetting your password, signing up for Group’s, looking at documents, using the calendar, checking the roster, voting on ballots and addressing comments.

4.1 Accounts

You can log into Kavi by first going to the SMPTE home page at www.smpte.org. From the home page under the Standards heading select Login to the Standards Community. This should bring you to the following page below.

![Figure 1 - Log in Page](image)

4.1.1 Log in Page

The first tab you land on is the Log in to your SMPTE account page. From here you can log in provided that you have created an account and have remembered the password.

4.1.2 Request a New Password

From the log in page select the Request a New Password tab. From this new page fill out the Username or e-mail address* box and click on E-mail new password. Provided that you have a usable email address on file you will be sent a way to reset your password in Kavi.

![Figure 2 - Request a new password](image)
4.1.3 Create a User Account

After selecting the *Create a SMPTE account* tab, you will see the *Create a SMPTE account* page. On this page, fill out all of the mandatory boxes indicated with an *.* Passwords can be created by any combinations of 6 letters and/or characters with punctuation. Once all the mandatory boxes are filled, click on Create new account. This should send an email response to your inbox alerting you to your eligibility for standards participation and access to Kavi.

![Create a SMPTE account](image)

*Figure 3 - Create a SMPTE account*
4.2 Group’s and Sub Group’s

The following section describes the relationship of the Group’s and sub Group’s used in the standards process and in Kavi. It also describes for first time users how to select and join the Group’s you are interested in.

4.2.1 Joining the Standards Community Group

When you first sign in to the Standards Community you are starting without belonging to any Group’s including the Standards Community. Referring to the SC Standards Community Landing Page below find the join group under Roster column.

![Figure 4 - Standards Community Landing Page](image-url)

This will take you to the following page shown below.
Figure 5 - Standards Community Join Group page

You will want to stay on the Home Tab as I have no idea what the Settings Tab is for.

a) On this page you will see the rules for participating and a Group Role function to select. All new participants should select Observer.
b) Along with selecting Observer one should also use the pull down box to select their Interest Category from:
   a. General Interest
   b. Producer
   c. User
c) You are given an opportunity to enter any other information that you feel could bring to this group:
d) Once that is completed then you should tick the box Yes, I accept the above terms and conditions to join a group.
e) Just below that you are given the choice to Submit Request or Cancel. Once you submit request you should see a page similar to the one below indicating “Congratulations. You have been accepted as a member of this group.” From here you are now free to look at Standards Community; Documents, Rosters, Calendar, Comments, Ballots, Email and Settings. As well as this it gives you updates on the latest activity within the Standards Community.
Congratulations, You have been accepted as a member of this group.

As a member of the SMPTE Standards Community you are now entitled to join any of the Technology Committees and their subgroups.

Current Activity (7 Days)

- **Event** 2478 OBD DG Meeting on Tue, May 24 2016
  *by* Christopher Lennon on Mon, Feb 8 2016
  *TC-2478 DG Open Binding of Ids To Media*

- **Event** 2478 OBD DG Meeting on Wed, Apr 6 2016
  *by* Christopher Lennon on Mon, Feb 8 2016
  *TC-2478 DG Open Binding of Ids To Media*

- **Event** 2478 OBD DG Meeting on Thu, Apr 7 2016
  *by* Christopher Lennon on Mon, Feb 8 2016
  *TC-2478 DG Open Binding of Ids To Media*

- **Event** 2478 OBD DG, Call on Mon, Feb 8 2016
  *by* Christopher Lennon on Mon, Feb 8 2016
  *TC-2478 DG Open Binding of Ids To Media*
  1. Please join my meeting. [https://us01web.zoom.us/j/18671839](https://us01web.zoom.us/j/18671839)
  2. Use your microphone and speakers (VoIP) - a headset is recommended. Or, call in using your telephone.

Figure 6 - Standards Community Members Page
4.2.2 Sub Group’s

Every Sub Group has a parent group they report to. This hierarchy continues all the way to the Standards Committee, and then ultimately up to the Standards V.P., Director of Engineering and the Board of Governors. For the usual standards work most users will be at the Standards Community level where you can sign up and be an Observer or Participant for any Technology Committee (TC). Once you have joined a TC then you may join any Sub Group of the TC as an observer. (Sub Group’s do not have Participating Members). A Sub Group can a Working Group (WG), a Study Group (SG) or a Drafting Group (DG).

NOTE TC’s are Sub Group’s as far as Kavi is concerned, however they are at the top of the Standards Community hierarchy.

The list of Sub Group’s can be selected two different ways.

The first one shown below appears on the lower right hand side of the Standards Community Page. From here you can click on any of the links and go to the Sub Group’s Home page. You also will see other Sub Group’s listed such as ST Liaisons Committee, these are not the droids your looking for…move along now…

Figure 7 - Sub Group List

The other way to get to Sub Group’s and your own Group’s (once you have joined them) is to use the Go To pull down tab to view some quick links as you can see below.
If you select All Group’s, it will take you to an All Group’s page that looks similar to the figure below. The Parent/Child relationship is shown by the indentation. From this page you can get to any Group’s home page. Be aware that you cannot join a Sub Group without first joining its parent group. (You can actually try but you’ll get the Note: Indicting the problem) For example, that means that you must join a Technical Committee (TC) before you can join any of its Sub Group’s.
Using this process, you can join as many Group’s that you want to. You should understand that this means you will receive email from each Group’s email reflector. If you want to vote in any of the Technology Committees, you must request the TC Chair to make you a Participant Member of the TC.

NOTE You must join the TC initially as an Observer, and the after you have attended one or more meetings of the TC you may request the TC Chair to make you a Participant.

However, you should be aware that Participant Members have responsibilities. You must regularly vote on TC Ballots and must attend TC meetings regularly. Sub Group’s of a TC only have Observer Members ad they are not “Due Process” Group’s. (See the OM’s for the specific rules.)
4.3 Roster

Kavi keeps a Roster of all the members of a group and their associated information. When you select Roster from the Standards Community Home Page it will take you to the page shown below.

From this page you can sort ascending or descending on any Category by clicking on the column header. An arrow next to the column displays which column is sorted and in which direction. You can also use the pull down boxes to sort by Roles and Active or Inactive Members. (Don’t ask me why we have inactive members)

![SC Standards Community Roster Page](image)

**Figure 10 - SC Standards Community Roster Page**

Depending on your assigned permissions, you may also be able to generate exports (csv or vcards) from here for the entire group, a selection of the group or individual members. You may also be able to create reports for members; meeting attendance, voting participation or eligible voters.

For appearance you can tab through the pages and select the number of members per page up to 80 maximum. You can see from above this is big group so there are 19 pages indicated with 40 members per page.

From the **SC Standards Community** Home Page, you can also select under **Roster, my profile**. This will take you to the page shown below. From here you can view all of the information, which you entered upon signing up to the Standards Community, and the permissions you have for a particular group. You can also unsubscribe from this Group’s roster. Clicking on this will take you to a confirmation page to unsubscribe. Understand that if you unsubscribe all email reflectors, visibility to the group and all its sub Group’s will be closed to the unsubscriber.
4.3.1 Unsubscribe from a Group

One method to Unsubscribe from a Group was demonstrated from the My Profile page of a Group. The other method is to go to the Home Page of the Group you want to be unsubscribed from. There under Roster you will find a link titled Remove Me. If you click on that link it will take you to a Leave Group page that will give you two options as shown below.

Always keep in mind if you leave a Parent Group you will be removed from all related child Group’s. You can see by leaving SC Standards Community above you would also be removed from any other TC (and its Sub Group’s) that you are a member of.
4.4 Calendar
Calendar is the mechanism for scheduling meetings and obtaining information to attend meetings. All Group’s have their respective Calendars. Shown below is the Standards Community Calendar page. From here you can; Subscribe to an iCalendar, Export a Calendar to a .csv file or Hide or Expose Events.

Some of the events are marked in Red. This is a warning that these events have been canceled.

4.4.1 Subscribe to iCalendar
With all Group’s you have the option of having iCal events populate your own managed calendars. Click on the Subscribe to iCalendar link and it will start the process with your calendar application.

4.4.2 Export a Calendar
This function allows you to export a .csv file of the Calendar Events. For some reason it gives you a years worth. Maybe it was just me.

---

**Figure 13 - Standards Community Calendar Page**
4.4.3 Hide or Expose Events, Ballots, Action Items and Project Activities

There are two basic methods for hiding Events. The first is a top level function that is next to the Export link that creates a toggle function on Shared Events. The link is either showing **Hide Shared Events** or **Show Shared Events**. What that does is obscure the shared events (from the sub Group’s) so that the user only sees the SC Standards Community Events.

The second method of hiding events is by using the pull down boxes and/or the check boxes next to them. The first line of these lets you narrow down the **Submitters, Event Types and a Time/Layout** selection. Next to them is the check boxes; **Events, Ballots, Action Items, Project Activities** followed by a **Display** and **Reset Button**. These allow you to expose or hide items other than Events. Change any of the items on this line and click on the **Display** button to activate. If you wish to reset all items to a default position click on the **Reset** button.

4.4.4 Time Period

You can select a specific time period two years back or five years forward from the drop down boxes closest to the calendar. Once you have selected your time period click on Go! and it will bring up the appropriate calendar with similar filters to select from.

You can also navigate forwards and backwards in time by either clicking on the **previous** or **next** in the **<<previous | this week | next >>** links which are found underneath the Calendar Title. You can also get a weekly view by clicking on **this week** which will open up a new page as shown below.

![Weekly View](image)

**Figure 14 - Weekly View**

4.4.4.1 Weekly View

From this view you are given some new options. If you wish to go back you can click on the **Full Calendar** link. If you want to get an email reminder from this calendar you would click on the **Add Weekly Reminder** link. (Funny place to put this…)

On the left hand side you have the option of moving from week to week by clicking on either **<<Previous | Today | Next>>**. The rest of the Display filters are available to modify as explained above.
### 4.4.4.2 Add Weekly Reminder

If you selected **Add Weekly Reminder** it will bring up the page shown below. This is where you would enter in the; **Reminder Type, Reminder Format, Reminder Time Zone** and the **Reminder Days** required. When all the selections are complete click on the **Configure Weekly Reminder** to complete the process.

![Figure 15 - Add Weekly Reminder](image)

**Figure 15 - Add Weekly Reminder**

### 4.4.5 Events

Events are usually meetings scheduled to get work done. These can be either face to face or web conferences. When you click on an event in a calendar a new page will appear that provides extra detail about the event as shown below.
In this example above TC-10E AHG is having a weekly teleconference (Web Meeting Which should have been put in the Location detail as well). The Description provides a link to the Web Conference and dial in numbers are provided as well. You should see the Name of the person that submits the Event along with the Group, Access, Voter Eligibility and Related Project details.

Towards the top right above the Event Title is a Download link that allows you to download the event as an iCal file.

**Figure 16 - Meeting Event Page**

**4.4.5.1 Record my Attendance**

If it is within ten minutes of the start time of the event, another link next to the Download link appears that reads **Record My Attendance**. If you click on this link Kavi will record your attendance for the event. You can verify your attendance by scrolling down the Event page. It will expose a list all members that had their attendance recorded. This is the mechanism used to track your attendance for events. If you are a Participant Member of a TC, you need to make sure you have your attendance recorded, as there are penalties if you do not attend TC meetings.

**Figure 17 - Record My Attendance**

<table>
<thead>
<tr>
<th>Company</th>
<th>Name</th>
<th>Interest Category</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Netflix, Inc.</td>
<td>Matthew Donato</td>
<td>General Interest</td>
<td>Document Editor</td>
</tr>
<tr>
<td>Institut fuer Rundfunks technik</td>
<td>Friedrich Gantinger</td>
<td>User</td>
<td>Document Editor</td>
</tr>
<tr>
<td>(Individual)</td>
<td>Howard Lulik</td>
<td>User</td>
<td>Observer</td>
</tr>
<tr>
<td>Mitag Media Technology, LLC</td>
<td>William Miller</td>
<td>User</td>
<td>Chair (Std)</td>
</tr>
</tbody>
</table>

**Figure 18 - Meeting Attendees**
4.5 Documents

From the home page of any group there are many ways you can access Documents. Be aware that in this case Documents really mean files. Generally folks add .doc, .pdf, .ppt, .zip and .xls file types however others can be added but should follow AG-02 guidelines.

First of course is using the Go to pull down and go to My Documents. This will give you a long list of Documents from all of the Group’s you are signed up for. (Why this shows you everything in TC10E for example even when you haven’t signed up for any of the sub Group’s is a mystery to me. I would think that it would parse this list to provide only TC 10E committee docs and the sub Group’s I signed up for)

You can also choose Documents from the tabs within a specific group, or click on the underlined Documents to the right of the Group Info on the Group’s Home page. Both of these will take you to the documents page of that group as shown below.

Once you are on the Documents Page you will find the page with Filter, Quick Views and Folders on the left and Documents on the right. Quick Views is self-explanatory and is handy way do get an overall number of documents you are parsing through.

Also on the right hand side are; a Bulk Actions pull down box, an Apply Action button and further over to the right are page navigation tools and two Actions pull down areas. Along with that you have the same sorting tools as described in Roster next to the column in gray. We will cover most of the tools we have mentioned in more detail below.

NOTE Keep in mind, new members do not usually Upload new documents. There maybe times where they do need to upload documents and when they do they should always go into Dropbox folder if you are not the Chair, Secretary or Document Editor. Kavi should restrict this and does to some extent and notates those files.
4.5.1 Document Filters

Document Filter is a toggle on toggle off mechanism to provide you with choices to narrow your search by categories. You can: Search by Name, States (State of the document not the United States) pull down box, Submitters pull down box, Publication Types pull down box and date ranges By Date: From, To. This filters also allows you to search specifically documents tied to ballots or open for comment.

![Document Filter Screen](image)

**Figure 20 - Document Filter Screen**

When the parameters are changed using the filters click on the *Submit* button to apply the filter.
4.5.2 Document Views

Besides using Filters to view documents you can also apply Actions to view the details of a document. At the right side of each document there is a gray and white pull down arrow.

![All Documents in this Group](Image)

<table>
<thead>
<tr>
<th>NAME</th>
<th>STATE</th>
<th>SUBMITTER</th>
<th>DATE</th>
<th>ACTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>SMPTe-TC Meeting Logistics-March 2016.pdf</td>
<td>Information</td>
<td>Redman, Maurice</td>
<td>2015-01-25</td>
<td>details</td>
</tr>
<tr>
<td>2015-02-09 Meeting map (Final).pdf</td>
<td>Information</td>
<td>Lambeth</td>
<td>Date</td>
<td>add revision</td>
</tr>
<tr>
<td>SC 2015-12-Atlanta.pdf</td>
<td>Information</td>
<td>Lambeth</td>
<td>Date</td>
<td>lock document</td>
</tr>
</tbody>
</table>

**Figure 21 - Single Document Actions**

4.5.2.1 Document Details

By clicking on that pull down arrow, you are able to select details from the pull down menu which will take you to a document details page as shown below. This will show a lot more detail about the document including providing links to previous revisions.

![SC Standards Community](Image)

**Figure 22 - Document Details Page**

4.5.2.2 Document Descriptions

You can also view or hide the Document descriptions by using the **Actions** pull down box (shown below in Figure 23), and selecting **show document descriptions**. This will show a brief description under each document if one was provided.
4.5.2.3 Show/Hide Archives

You can select to show or hide archives by clicking on the toggle button called show archives which is next to the start a jot just below Quick Views (shown in Figure 20 above). This will allow you to toggle back and forth between the two views. Ok now don’t ask me you tell which documents are archived.

4.5.3 Document Actions

Document Actions allow you to; download one or many documents, download a document list in a .csv file, show document descriptions, show the details of a document, add a revision or lock a document. Below we provide more details on how to use most of these tools except add a revision which you will find in the next section.

All Documents in this Group

<table>
<thead>
<tr>
<th>NAME</th>
<th>STATE</th>
<th>SUBMIT</th>
</tr>
</thead>
<tbody>
<tr>
<td>SMPTE TC Meeting Logistics-March 2010.pdf</td>
<td>Information</td>
<td>Roldan,</td>
</tr>
<tr>
<td>2016-02-29 Meeting map f(Final).pdf</td>
<td>Information</td>
<td>Lambshead, Alan 2016-01-25</td>
</tr>
<tr>
<td>SC 2015-12-Atlanta.pdf</td>
<td>Information</td>
<td>Lambshead, Alan 2015-12-09</td>
</tr>
<tr>
<td>AG-10b-2015-Liaisons-2015/208.pdf</td>
<td>Administrative</td>
<td>Lambshead, Alan 2015-12-08</td>
</tr>
</tbody>
</table>

Figure 23 - Document Actions

4.5.3.1 Download Documents

One can download a single document or multiple documents at the same time. On the left hand side of the Document list you can check one or multiple boxes next to the documents you want to download. Then in the Bulk Actions pull down box you can select Download and then when you click on the Apply Action button next to it the procedure will start to download the documents you selected.

Another method is to use the top Actions pull down box and from there select the download 100 of 254 as a group of documents to download. The number range follows what range is selected to view.

Of course the simple way to download a single document is to just click on it. Yeah, we like simple.

4.5.3.2 Download Document List

You can download a document list in .csv file format by selecting download document list csv from the top Actions pull down box. You will get a complete list of all documents in that group. (maybe even more… who knows?)

4.5.3.3 Lock a Document

From the Document Details page or from the Actions pull down next to a document you are able to lock a document. WTF!! If you are not the Document Editor and even if you are DO NOT DO THIS!!! I have no idea why this is available to members. This will not allow any revisions or anyone else (except the person who locked the document) to do anything with it.

4.5.4 Add a Document for Members

Just below the Quick Views section of the Documents page are two buttons quick add | add document that will open a new page to add a document to the group. Again if you are NOT the chair, secretary, or document editor only upload documents to the Dropbox folder of the group. You will be publicly shamed
and ridiculed for your attempt to do otherwise. (Actually they should be grayed out to you, and Kavi should not allow you to add unless you have permissions.)

There is also another method to adding a document and that is if you are adding a revision to an existing document. Again this would be something used more by a document editor but it is explained below. This tool is accessible through the Actions pull down arrow next to each document.

If there is an existing document and you are adding a revision please use Add Revision NOT Quick Add or Add a Document.

4.5.4.1 Quick Add

Quick add, allows you to Choose a File or provide a link to a document already on Kavi. You can then use the State pull down box to select what type of document it is. Finally, you need to select a folder to put it into. Hint, Hint, the Dropbox Folder should be the right place. All the other folders will be exposed to you and possibly grayed out with (doc mgr only) next to it. You will not be able to select those folders.

![Figure 24 - Document Quick Add page](image)

Once all the selections are made you can either Upload or Cancel.

4.5.4.2 Add a Document

Choosing to add a document will allow you to input more information about the document and provide you with tools to customize your email notice that goes out with the document posting. Be aware that there are required fields that are denoted by an asterisk (*). There are also fields that may not be available depending on your permissions such as Sharing.

Make sure when adding a document to link it to a Project if it has one. Please, Please do this! It helps keep things organized and allows folks to find things much easier. It is also required to have this to create a proper ballot. (For TC chairs later on.)
To add a document:

a) **Document Source**: When adding a document first choose your file or input your link to it.

b) **Document Title**: You can repeat the same name as your file or something more relevant. Be aware there is a document naming convention that Must be followed for Engineering Documents. One can find that information in AG-02 Section 7.

c) **Document Number**: I have no idea what you would put here. I generally leave it blank.

d) **Description**: Place a brief description of what the document is.

e) **Folder**: This is where you choose a folder from the drop down box. REMEMBER Drop Box?

f) **Sharing**: There may not be options available for your document. This is a tool for Document Editors and TC Chairs.

g) **State**: This is a pull down box that refers to the State of the Document. If you don’t know choose **Information: Not a formal committee document**.

h) **Related Projects**: This pull down box lets you choose related projects. If you are uploading a document related to a specific project, (e.g. a document that your Drafting Group is working on) then select the **project name** from the pull down and then click the **Add** button. The project name should appear under the pull down. If the document is not related to any specific project, then leave the pull down on – **Select project** – .

---

### Figure 25 - Add Document Page

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Document Source</strong></td>
<td>When adding a document first choose your file or input your link to it.</td>
</tr>
<tr>
<td><strong>Document Title</strong></td>
<td>You can repeat the same name as your file or something more relevant. Be aware there is a document naming convention that Must be followed for Engineering Documents. One can find that information in AG-02 Section 7.</td>
</tr>
<tr>
<td><strong>Document Number</strong></td>
<td>I have no idea what you would put here. I generally leave it blank.</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>Place a brief description of what the document is.</td>
</tr>
<tr>
<td><strong>Folder</strong></td>
<td>This is where you choose a folder from the drop down box.</td>
</tr>
<tr>
<td><strong>Sharing</strong></td>
<td>There may not be options available for your document. This is a tool for Document Editors and TC Chairs.</td>
</tr>
<tr>
<td><strong>State</strong></td>
<td>This is a pull down box that refers to the State of the Document. If you don’t know choose <strong>Information: Not a formal committee document</strong>.</td>
</tr>
<tr>
<td><strong>Related Projects</strong></td>
<td>This pull down box lets you choose related projects. If you are uploading a document related to a specific project, (e.g. a document that your Drafting Group is working on) then select the <strong>project name</strong> from the pull down and then click the <strong>Add</strong> button. The project name should appear under the pull down. If the document is not related to any specific project, then leave the pull down on – <strong>Select project</strong> – .</td>
</tr>
</tbody>
</table>
i) Below in **Email Notifications** you can select to send out an email notification with the posting of the document. This box is checked by default. If you do not wish to send out a notification uncheck the box.

j) You can send out a **cc** email to other addresses by typing them in the text box.

k) Along with the default text of the email, you can provide an additional **message** in the email by typing text into the associated text box.

l) There are **Advance Options** that allows you to change permissions about **Comments** to the document. Generally, you should use the default options for Comments. This is particularly important for documents that are going to ballot.

m) When you have completed with all the information either click on **Add Document** button on the bottom of the page or click **Cancel**. Once the document is posted to Kavi, you will see an acknowledgment page showing the document details as posted.

### 4.5.4.3 Add a Revision

By selecting the **Actions** pull down arrow at the right side of the document row, you can add a revision to the document.

Selecting **Add a Revision** will take you to a page that looks very familiar to the **Add Document** page. Fill out the required fields and then click on the **Add Document** button on the bottom. Permissions should not allow you to do this if you are not the Document Editor but low and behold you could. **DO NOT DO THIS** if you are not the Document Editor!! Your other Document Editors will thank you.

When you post a revision of an existing document, you will only see the most recent revision of the document in the list. This is the preferred method when you are posting successive drafts of a document in a drafting group. If you open the Document Details page, you will see links to each revision of the document.
4.6  Ballots

Ballots are usually done through Kavi and as a member of a group you will be informed via email when a ballot is open for voting and comments.

![Figure 26 - Email Ballot Notice](image)

Clicking on the link from the email should take you to the *Ballot Details* page. You can also select the Ballot by using the *Ballots* tab on the *Group’s Home* page, and then you will see a list of the Group’s ballots. Click on the *Ballot* to open the *Ballot Details* page.

![Figure 27 - Observer Ballot Details Page](image)
4.6.1 Voting

Please Read the Ballot Instructions! This Ballot Page gives you the detailed information about the Ballot and provides the supporting document(s) in a .zip file that can be downloaded. (Multiple supporting documents will be in a .zip file which you can download and open.) It also informs you if you are not eligible to vote on this Document or action. The page above shows the response to an Observer who is not allowed to vote but can submit comments by clicking on the Add a Comment link. This will open a whole new window and is shown in more detail below.

If you were a Participating member then you would select one of three choices; Affirmative, Negative or Abstain. If you vote Negative you are required to provide comment(s). When you wish to cast your vote there is a Vote button where the Ineligible button is shown above. By clicking here you have now voted. You can change your vote if you wish up until the closing date.

4.6.1.1 Viewing Categories of Ballot Details

You also have the ability to view the Ballots voting Data towards the bottom of the Ballot Page. The gray arrows will expand or contract all categories. Or you can select one by one by clicking on the appropriate Category. This allows you to view Comments by clicking on the Voter Comments Collected During Ballot Voting.

4.6.2 Changing your Vote

The Group Chair has to select the possibility for Members to change their vote when they create the ballot. If this has been allowed, then you can go in anytime before the ballot closes and change your vote. To do this first go to the Group’s Ballot page and you should see a gray rectangle to the right of the ballot that says Change Vote. (see below)

![Figure 28 - Change Vote Mechanism](image)

By clicking on that link it will take you to the Ballot page where you can change your vote. Remember if you vote No you must provide a comment as to why. If you change your vote to Abstain you cannot provide a comment.

(I don’t know why, when you vote Abstain, it doesn’t remove the text box below. Instead if you put text in the Comments section and then vote it will warn you that your vote was not recorded. You will need to clear the text before it will record your vote.)
4.7 Comments
Comments are added during the open period of a ballot. Comments can also be put against documents if the document editor gives that permission at the time of adding a document.

4.7.1 Adding comments to Ballots
By selecting the Add a Comment from the Ballot Page you will be brought to a separate window as shown below.

![Add Comment Page](image)

**Figure 29 - Add Comment Page**

On this page you will see details of the Ballot. Below that is the Add Comment area. Here is where you want to fill in the appropriate information. Some fields are required and are denoted by an asterisk (*).

a) **Subject**: Enter in text describing what your comment is.
b) **Comment**: Give specific details of your comment.
c) **Category**: This is where you can select one of three categories; Editorial (ex. Spelling, grammar), Substantive (ex. Technical issues) or N/A which is of course is not applicable.
i. A Substantive Comment is intended to raise an issue that you believe must be cleared before you can approve the document

ii. An Editorial comment is one intended to be helpful to the document editor. Even though you may feel strongly about the proposed corrections, editorial comments should not be used for issues that will cause you to “no” vote if the editor disagrees with you!

d) **Section**: You can provide directions to the specific area of the document if you can

e) **Item**: This allows you to further select the item of the comment. You can choose between; Figure, Paragraph, Table or N/A. You are also given a small text box to enter more description using text.

f) **Proposed Solution**: Although not mandatory you should always provide a solution if you comment on a problem. This allows a large box to enter text of your proposed solution.

g) **Supporting File**: You can upload a file if you would like to support your comment. Sometimes folks submit a redlined version of the document especially if there are a lot of editorial comments.

h) You can then choose to either; **Save and Add Another comment, Save or Cancel** by selecting any of the buttons.

You MUST submit one comment for each issue where you require a specific response and/or correction (when you submit a comment the next page is automatically a new comment form).

NOTE If you have a number of editorial comments, you may submit a single comment “Editorial revisions as shown in markup” and upload a markup file with your comment (but remember that the editor may not accept all of your suggestions).

4.7.2 Adding comments to Documents

Adding comments to a Document is a similar process to adding comments to a Ballot. While in the Document page of a group using the Quick Views click on Open for Comment. That will provide you with a list of all the documents in that group that are open for Comment.

![Figure 30 - Documents Open for Comment](image)

After you locate the document you wish to comment on use the pull down arrow on the right hand side to bring up actions for that individual document. There you will see both **add a comment** and **add bulk comments** links that you can click on. Clicking on **Add a Comment** will take you to a page similar to adding a comment to a Ballot. (See above)
4.7.2.1 Add Bulk Comments

If you select **Add Bulk Comments**, you will be taken to a page similar to the one shown below. From here it gives you instructions on using a .csv template and entering your comments onto that and then uploading. (I don’t know how many people use this but it sounds painful.)

![Figure 31 - Bulk Comments Page](image)

4.7.3 Viewing Comments

There are many ways to view comments all of which usually start from the Group’s Home page. If you use either the top line **Comments** just under the group name or select **Comments** next to the group info. Either one will bring you to the page shown below. This will bring you a HUGE selection of comments which you can narrow down by using the appropriate pull down boxes to create a search.

(I don’t really recommend this way if you are looking for recent comments on a ballot. I find it much quicker to find the ballot first and then see the comments from there.)

![Figure 32 - Group Comments Page](image)
By selecting the Ballots and then filtering them until you find the appropriate Ballot you are looking for, you may arrive quicker to the comments you are looking for. Once you are on the Ballot Details you can select **Voter Comments Collected During Ballot Voting** pull down which will display all of the associated comments.

4.7.3.1  Download Comments

You are given the option of downloading a .csv or .rtf file of the comments you have selected to view. Right under the filter selections and to the right of the **Total Results** you will see a couple of pull down boxes that allow you to select all or the selected (with a check in the box next to them) comments. Once you have made the right selections you can click on the OK button and it will download your selected comments to your computer.

4.7.3.2  Single Comment Detail

From there you can click on the subject line in the individual comments and get specific details on the single comment as shown below.

![Figure 33 - Comment Detail View](image)

From this page you can view the comment and the proposed solution. Right below the main headers there are links you can select called; **All Comments** | **Document Details** | **Add Comment** | **Add Bulk Comments**. These links will take you to various pages that are associated with the Document that is open for comments.

The **All Comments** link is a handy one to use as it takes you to the Comments page like shown above in Figure 31 however it will only show the comments associated with that document.

By selecting the **Document Details** this will take you to the **Document Details** page. (See Figure 33 below)

There are also two more links to the right of these, **<< Previous Comment in Document** | **Next Comment in Document >>** which allow you to toggle to the previous comment or next comment as selected.

You can also assign this comment to yourself. (I have no idea why. This should be the responsibility of the document editor to perform this function.)
You are also given the ability to expand the following headers at the bottom of the page to show much more detail for Document Information, Comment Information and Comment History.

From the Document Details page of a document open for Comment you can; Lock, Add a Revision, Add a Comment, Add Bulk Comments, and View (and Manage) Comments. There are two links to View Comments. One towards the top of the page and one towards the bottom of the page next to Comments. (I have no idea why the lower one includes Manage) Both take you to the same Comments page that has been filtered down to show only the Documents Comments. (similar to Figure 31)

All of these links have been explained previously except Add a Revision. (Why on earth would it allow a Group Member Add a Revision is beyond me. DON'T DO THIS unless specifically asked by the document editor.)

Also speaking about things not to do, DON'T Lock a document either.

4.7.4 Group Member Comment Resolution

As a Group Member you are allowed to provide Comments to a document and as such you will need to respond to the resolution provided by the Document Editor. When the Document Editor responds to your comment you will receive an email that will allow you to see the Document Editors response and provide you a link to the response on Kavi. (see below)
From here you can check the box that is appropriate to the response to your comment. You can Accept Response, Reject Response or Withdraw Comment. If you select Reject Response you need to provide a reason in the text box next to the check box. When done you then click on the Submit link below the Comment Submitters Actions. Once submitted it will send an email to you as well as the Document Editor.
4.8 Action Items

If you are not a Chair, Document Editor or Secretary of a Group you cannot add, modify, close or delete an Action Item, however you can view or be assigned an Action Item as a Group Member. Generally, you will be sent an email if you are assigned an Action Item. (see below)

![Figure 36 - Action Item Email](image)

This will give you the details of the Action Item and also provide you a link directly to the Action Item Details where you can respond to the Action Item. (see Figure 38 below) You can also access Action Items by clicking on either of the two links provided on the Group’s Page labeled Action Item and Action Item.

![Figure 37 - Action Items Page](image)

From here you will find the usual filters described in the previous sections. You can use the Actions pull down menu on the right hand side to Show or Hide Action Item Comments. You can also download a .csv spreadsheet of all the Action Items for the group.

From this page you can also use the pull down arrow on the right hand side of the specific Action Item to view details, modify details or close action item. If you are not assigned the Action Item, you will only be able to view details.
(There is also another way to see Action Items but I would avoid it completely as it is so misleading. Using the **Go to** pull down menu towards the top of the screen you can select My Action Items. It is NOT your action items. It is every Action Item for every group you belong to including all the Closed Action Items. Really Kavi….you tricked me. You can still navigate to “your” specific Action Item if you want.)

### 4.8.1 View Action Item Details

Using the link from the email or from the Group’s Action Items you can view the Action Item Details. (see below)

![Figure 38 - Action Item Details](image)

From here you can see the details and history of the Comments for the Action Item. You can also select **Close** | **Modify** for the Action Item.

### 4.8.2 Modify an Action Item

Using either method described above you can select to modify an Action Item which will bring up the following page.
Figure 39 - Modify Action Item Page

From this page you can; change the **Subject** line, add a **Comment**, change the **Status**, change the **Due Date**. (Don’t know why the one assigned an Action Item could change the due date) You can also add a **Reference Item** (file or link) if necessary and select the email notifications if you wish to send any. Once all the changes have been made then you can use the **Submit Changes** at the bottom to complete the process.

4.8.3 Close and Action Item

By selecting to close an Action Item using any of the methods described above you will be exposed to the Close Action Item Page. (see below)

![Close Action Item Page](image)

From here you can view the details and add a final comment in the **Add Comment** text box and then select the email notifications if required. At the completion you can select **Cancel** or **Close Action Item** button on the bottom to finalize the process.
4.9 Email

Kavi allows members to participate and communicate on email reflectors that are set up by establishing Projects. (See Section 2.11 below) Projects are created initially by SMPTE staff and then owned and maintained by the Project Chair(s). Kavi keeps an email archive of all the emails sent to the Group's reflector. It also provides members the ability to directly email the Group's Chair(s).

When you join a Group you are automatically signed up to that Group's reflector. If it is a very active group on email, then be prepared for your email box to fill up. You can NOT belong to a group and NOT be subscribed to the reflector. So unless your very lonely, I would not recommend signing up for every group in the Standards Community.

4.9.1 Viewing Group Emails

There are many ways to view emails from a Group. Of course you see them in your email inbox without having to log on to Kavi. If you are on Kavi and are interested in a recent email, then the best way to access that is from the Group's Home page. (see below)

---

You can see from above that the latest emails appear in two places. Once under Recent Activity and again under Recent Email. From these two areas you can click on the underlined text of the specific email and that will take you to the detail view of that email. (see below)

---

Figure 41 - Group Home Email Examples
From this page you can perform a couple of functions. You can; **<< Back to List**, **<<Previous Month |Next Month >>**, **Search Mail**, **Sort by: Dates-Dates | Authors | Subjects**, **Send new message** or **Reply to this message**.

Selecting any of the top direction links will of course take you to the obvious places designated in the links.

**Search Mail** gives you a text box to provide you the ability to search the Group’s Email Archive.

**Sort By** links give you access to filters to sort through the Group’s Email Archive.

**Send new message** and **Reply to this message** brings up a new page that allows you to Send a new message with the only difference between the two is that the Subject line is already filled in for the Reply. (See the following section for details)

### 4.9.2 Send Email

You can **Send Email** from a couple of locations; from the Group Home Page under Email, from the Email Detail Page as mentioned above and from the Email Archive Page shown below. When you click on any of these links it takes you to the **Send Mail to Group Mailing List**. (See below)
Now this title is a little misleading as depending on which email reflector you choose in the To: pull down menu it will ONLY send your message to the Group Mailing list if you do NOT change the selection in the pull down menu. If you choose the Chair list or an individual, it will only send to that party and will not be a part of the Email Archive.

From this page you can fill in the appropriate Subject and Message Body text and also CC other folks that are not a part of the group. PLEASE do not include folks that are included in the Group in the CC. That's just bad form.

Once you are done clicking on the Send Mail button will then send your message out to the address(es) you have selected.

4.9.3 Reply to this Message

As far as I can tell the only way you can reply to a message is from the Email Detail page shown above. When clicking on this link it will take you to a page identical to the Send Email page shown above with the exception it will auto fill in the Subject line for you with a link to the email you are replying to. Everything else is the same as Send Mail.

(Be aware that this does not work like normal email Replies. This creates a SEPRATE email that will appear in the Archive as Re: [subject] if you have selected the Group’s reflector in the To: pull down.)

4.9.4 Email “Archive”

Kavi provides an Email Archive for all the emails send to the Group’s reflector. (ex. test_tc@lists.smpte.org ) This page can be brought up using three methods. (Note that the term “Archive” has a confusing meaning in Kavi and thus why I have put it in quotes. As you will see below Kavi only uses the term “Archive” for a month to month display of emails by date. Why? Who knows…make no sense.)

First, and NOT a recommended method, is from the Go to pull down menu on each page. By selection My Email from that link you will be provided an Email “Archive” of all the TC’s and their Sub Group’s even if you are not signed up for them. (This is a very dumb thing that Kavi allows, because from other locations if you are not signed up for the Group you cannot see their email. So you can subvert the system.)

The other ways are using the two links provided on the Group’s Home Page labeled Email and Email. From there it will take you to the Email Page. (see below)
Figure 44 - Group Email List

From this page you can; **Send Email, View Archive**, use the pull down boxes to filter the results, cycle through the pages of the emails and **View** individual emails. You can also use the different column headers to sort ascending or descending view of the “Archive”

Ok here is where it gets misleading although handy. If you click on **View Archive**, it will bring up the page shown below labeled **Mail Archive**. This is really the same “Archive” as described above but shown in a month by month format sorted by date starting with the most recent. (Why they expose the **Next Month>>** button while looking at today’s date is a mystery as well. Maybe Kavi sees into the future.)

Mail Archive for TC-32NF Network/Facilities Architecture: 201

<table>
<thead>
<tr>
<th>HOME</th>
<th>DOCUMENTS</th>
<th>ROSTER</th>
<th>CALENDAR</th>
<th>COMMENTS</th>
<th>BALLOTS</th>
<th>ACTION ITEMS</th>
<th>EMAIL</th>
<th>5</th>
</tr>
</thead>
</table>

**Figure 45 - Group Mail “Archive” List**
4.10 Settings

By choosing SETTINGS as a member will only expose some cryptic information to you and allow you to clear out your history on the very bottom below the section My Settings. There at the very bottom you will see a button Clear These Settings, which when selected will clear out some of your recent viewing in that group. (At least I think that's what it does. It should really not be exposed to the general member and at least be more clear on what it clears out.)

Later on if you become a Group Chair this Settings page will give you access to certain Settings for each Group.
4.11 Projects
Welcome to what I like to call "Kavi’s Alternative Universe". The reason for this is that Projects are a rather recent designation for us old time SMPTE Standards Community Users that used to use “Work Statements” to begin a work effort and to create a Sub Group. I have found for myself, being a Sub Group Member only, that I have no need to really look at the Projects unless I would like to get a quick status of the Project or read its scope. Projects, once approved, are maintained by the Chair of the specific Sub Group. You will need to understand the relationship of Projects to Group's and Documents to make sense of it all. (Note: You also will find that Projects as far as Kavi is concerned is still a “Work in Progress”.)

Each Engineering Document (documents that will become published documents) is required by the Standards Operational Manual (OM) to have an approved Project Proposal. (Section 6.3 SMPTE Operations Manual v3.1) This makes a 1:1 relationship of Projects to Engineering Documents. Furthermore, each Project is to be assigned to a Sub Group which is also to be known as a Project Group. (Confused yet?)

The OM’s also state that an item of work undertaken by a Technology Committee should have a Project associated with it. So where this gets interesting in that the OM’s so far are silent on whether a Working Group (WG) is created with a Project Proposal and then has that Project assigned to it. Certainly all Drafting Group’s (DG) and Study Group’s (SG) should have an approved Project Proposal that is assigned to it.

I would also assume that a Task Force (TF) would have a Project assigned to it but again the OM’s are silent on this as well. So you will find looking through Kavi that some WG’s have Projects assigned to their work effort and some don’t. Therefore, there is not a 1:1 relationship between Sub Group’s and Projects. Technology Committees (TC’s) are at the highest level in the Standards Community and therefore have no Projects assigned to them.

If Working Group’s (WG), who handle multiple Projects at a time is associated with a Project then there becomes a Parent-Child relationship between the WG and the DG’s. In this case the Parent Group is called a Project Group. (Note: Looking through Kavi I have not found anything that relates to Project Group’s).

Stay tuned as I am sure that this will be updated at some time in the future.

4.11.1 Viewing Projects
Like viewing other items in Kavi you can view Projects in many ways. The first is from the Go to pull down menu that appears on every page. (You can refer to Figure 8 above) From there you can select Projects which will take you to a page that displays ALL Projects no matter what Group’s you are signed up for. (see below) You can also select and individual Project from under the column marked My Projects. This currently is a list of all projects from the TC’s you are signed up for.

(This is really NOT “your” Projects from the Sub Group’s you have signed up for, as I think it should be.)
From here you have many options to filter the list to narrow things down to what you are looking for. Again you can use the column headers to sort the list in ascending or descending order. You can also use the main **Action** pull down box to **download project list** of the Projects in .csv format. You can also **download project by type**. By selecting this it will bring up a separate window that allows you to sort the list by Type. (see below)

This will give you a pull down menu that allows you to select the Type of Project. (This is strange because the previous list gives you no indication of the Type as a column.) Looking at the Types using the pull down menu, they are not very clear. For example, there is an ANSI Project (ANSI), and a SMPTE Engineering Project (ANSI), a DO NOT USE and Published Document. (I’ll let you figure out if that is any help to you.)

Along the right hand side of each listed Project is a pull down Arrow that if selected will provide a link labeled View that if selected will take you to the Project Overview Page. (See Figure 48 Below)

You can also get to individual Projects from the Group’s Home Page. It is in the Right Hand Column at the bottom of the list right below **Sub Group’s**. (See below)
From this page you can select the individual Project that you wish to look at and it will take you to the Project Overview Page as shown below. This list may be broken into sections such as **Assigned Projects** and **Visible Projects**. Assigned Projects are those that are assigned to Sub Group’s and Visible Projects seems to be the ones that are complete and still visible to the Sub Group and Standards Community Members.

### 4.11.2 Viewing Project Overview

**Project Overview**

<table>
<thead>
<tr>
<th>Project Type</th>
<th>SMPTE Engineering Project</th>
<th>Project Contact</th>
<th>Project Status</th>
<th>Consensus Group</th>
<th>Future Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>(AN)</td>
<td>10E:115:1:142</td>
<td>Mr. William Miller</td>
<td>Proposal</td>
<td>TG 10</td>
<td>10E Compliance</td>
</tr>
<tr>
<td><strong>Updated</strong></td>
<td>(05-10)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Project Description:** This is a ‘tied’ project of 10E 115 Reference Display and Environment for Critical Viewing of Television Pictures.

**Project Relationships**

- **Assigned Groups:**
  - TG 112:160
  - 112:160 Reference Display and Environment for Critical Viewing of Television Pictures

- **Related Projects:**
  - 112:160 Reference Display and Environment for Critical Viewing of Television Pictures
  - 112:160 Reference Environment for Critical Viewing of Television Pictures
  - 112:160 Reference White for Historical Displays
  - 112:160 Reference White Reference Display Measurement and Calibration Procedures

**Contribution Summary**

**Contributors:**

1. Miller, William Wing Media Technology, LLC

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**Figure 48 - Projects from Sub Group Home Page**

**Figure 49 - Project Detail Overview**
From the Projects Overview Page it will provide you with the information about the approved Project. It also provides a status on a bar graph of the progress of the project. (Please don’t ask me how it calculates this. I think it is up to the Sub Group Chair to select the amount of completion.)

You will also notice that underneath the Header of the Project there are categories that you can select to see more information about the Project. These are; **Overview, Timeline, Activities, Documents, Ballots, Events** and **Action Items**. A lot of these have been discussed in the previous sections so I will not cover those in this section, except **Timeline and Activities**.

**NOTE** The **Documents, Ballots, Events** and **Action Items** may not be the same as the Sub Group. The person creating each of these items must associate it with a project or it will not appear here. So be careful if an Old Timer is creating these and forgets to associate them with a Project.

### 4.11.3 Viewing Project Timeline

By selecting the Timeline from the Project Overview Page it will take you to a graphical representation of the Events that have occurred in the Project. (See below)

![Figure 50 - Project Timeline](image)

From here you can scroll back and forth to see the events that have taken place for the Project. Also just under the title of the timeline and the main header selections are the check boxes; **Activities, Action Items, Ballots** and **Calendar Events**. By checking or un-checking these items you can choose what you want to display on the timeline.

### 4.11.4 Viewing Project Activities

By selecting Activities from the Project Overview Page it will take you to the Project Activities Page. (Show below)
From this page you can see the Activities that were set up by the Project Chairs. (You will find that some projects have done a good job at listing these and others have not done so well.) You are able to use the filters as have been described before to narrow down the results.

Towards the right hand side of the page there are two Action pull down selections. The very top one does not provide anything, but the one below it allows you to download a .csv file of the Activities.

Next to each Activities are pull down arrows that allow you to view the details of each specific Activity. (see below)

From here you can also see the referenced item of the Activity and the Activity History. You are also provided with some Action pull down links next to the documents that allows you to view the details or lock the document. DO NOT LOCK the document.
5  Document Editors

It is the document editor’s responsibility to maintain the current set of files using Kavi during development and approval process of a Document. Document Editors are given the following management privileges in Kavi to complete their work. (See Below)

The document editors are given management privileges such as; Contact List, Manage Action Items, Manage Documents, Manage Comments, Manage Meetings and Manage Projects. (I don’t understand why Manage Projects would be in the hands of the document editor. I believe is the Group Chairs job.) We will cover Manage Documents and Manage Comments Here. Contact List selection is not really a privilege but just a toggle if you want the roles email shown on the Group’s home page.

We are not going to cover all of the privileges as some are covered in the Group Secretary section below. Instead we will walk through the process of an Engineering Document lifecycle as it relates to a document editors relationship with Kavi.

5.1  Manage Documents

Being the Document Editor you are given the privilege from the Group Chair to Add, Edit and Delete Group documents. You will also have access to manage Folder Actions that will be described below in section 3.2. As you can see from below when you use the pull down arrow next to a document it provides you other options that you have not been exposed to before. (see below)
Besides the usual tasks that are explained in Section 2.5.3 and 2.7.2 you are allowed to modify the details of the document or delete the document as a Document Editor.

5.1.1 Modify Document Details
To modify a document, click on the link from the pull down arrow next to the document that says modify details. This will take you to a page as shown below.

Modify Details

This form allows you to edit the information about the selected document.
To edit the document itself, you may upload a revision of this document, or do the following:
1. delete the document
2. edit the document locally
3. add the modified document as a new document.

Modify Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Name</td>
<td>This is the name the document will be downloaded as.</td>
</tr>
<tr>
<td>Document Title</td>
<td>This is the name the document will be displayed as.</td>
</tr>
<tr>
<td>Document Number</td>
<td>You may associate an alphanumeric string as the official document number for this document. This document number is displayed on the document details page and elsewhere as needed.</td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>Submitter*</td>
<td>Explicitly setting the owner name can be useful when importing historical documents into the archive. Select an owner from the drop down menu.</td>
</tr>
<tr>
<td>Submission Date*</td>
<td>Explicitly setting the submission date can be useful when importing historical documents into the archive. (yyyy-mm-dd)</td>
</tr>
<tr>
<td>Technical Contact</td>
<td>You may identify a technical contact or editor for this document. Contact information is displayed on the document details page and on other pages that list the document as a reference item (ballots, calendar events, action items).</td>
</tr>
<tr>
<td>Folder*</td>
<td>This is the folder the document will be associated with.</td>
</tr>
<tr>
<td>Sharing</td>
<td>This document will be visible in the Documents section of this group. Additional Sharing Options: share with all</td>
</tr>
<tr>
<td>State*</td>
<td>Information: Not a formal committee document</td>
</tr>
<tr>
<td>Related Projects</td>
<td>Select project —</td>
</tr>
</tbody>
</table>

Note: The message will appear in this group's email archives only.

Figure 55 - Modify Document Details

From this page you can change the many things about the document including; The Document Name, Document Title, Document Number, the Submitter, Submission Date, Technical Contact, the Folder it resides in, its Sharing visibility, its State and Related Projects. (Be sure to always relate your documents to a Project.)
You are also provided an email message that can go out with the change and below that (not shown above) you can set whether members can comment on the document. When you are done you can then select **Submit Changes or Cancel**.

This page also provides links near the top that allows you another method to **add a revision**, **delete the document or add a modified document (as a new document)**. **Add a revision** has been explained before and the **add a modified document (as a new document)** just connects you to the **Add Document** page explained in Section 2 as well. The delete the document is new and shown below.

### 5.1.2 Delete a Document

From either the pull down document action arrow or from the Document Detail page as a document editor you have permission to delete documents in your group provided they have not been attached to a ballot. Then they must remain for historic purposes. When you click on either link it will take you to the Document Deletion Page as seen below.

![Figure 56 - Document Deletion Page](image)

From here you are provided the details of the document and two choices either to **Cancel** or **Delete Document**.

**DO NOT DELETE DOCUMENTS THAT, YOU ARE NOT RESPONSIBLE FOR OR HAVE BEEN NOT INSTRUCTED TO DO SO BY THE GROUP CHAIR.**

Ok I will stop yelling now that you have been sufficiently warned. If you choose Delete Document, you will be given a confirmation similar to the one shown below.

![Figure 57 - Document Deletion Confirmation](image)
5.2 Managing Folders

Folders are used to organize the work of a Group. Privileges are given to the Document Editor, Group Secretary and Group Chair to manage Folders. Document Editors should only use these privileges with the consent of the Group Chair. (I would love to see a separate Manage Folders privilege in the Kavi Roles as I don’t think Secretaries should have these permissions.)

There are two areas where you can manage folders from. One is right under the filter to the left of the page shown below. This is where you can add folder which is described below.

![Folders View](image)

**Figure 58 - Folders View**

The other area is by using the Actions Pull Down Arrow on the right hand side of the page whilst viewing a folder.

![Folder Actions Pull Down Menu](image)

**Figure 59 - Folder Actions Pull Down Menu**

From here you can select; manage folder, add document, add multiple documents, add subfolder, archive folder, show document descriptions or move folder. We have already discussed adding documents (Section 2.5.4) and showing descriptions (Section 2.5.2.2) and therefore will explain the rest of the actions below.
5.2.1 Add Folder

By selecting add folder you will be given a page to add the specific information required to add a folder to the Group. (See Below)

![Add New Folder Page]

From here you are asked to provide; **Folder Name**, **Folder Description**, **Display Columns**, **Folder Placement**, **Sharing**, **Upload Permissions**, **Comment Permissions** and **Auto Naming**.

a) **Folder Name**: This is a mandatory field and should reflect the contents to be placed in it.

b) **Folder Description**: This provides an area to describe the folders purpose.

c) **Folder Display Columns**: This allows you to inherit the columns (from where this is set up is a mystery to me) or you can select the Show these columns in the Document page. (Does this make sense to you? I think they mean Show the selected columns from the document page in the folder page.) You can then select from the columns below.

d) **Folder Placement**: This allows you to select where the folder goes. Is it at the top of the directory structure or is it a subfolder.

e) **Folder Sharing**: This allows you to share the folder with other Group’s.

f) **Folder Upload Permissions**: This allows you to set who is allowed to upload to the folder.

g) **Folder Comment Permissions**: This allows you to set the permissions for a folder to allow or disallow by role who can add or view comments on the documents in that folder.

h) **Folder Auto Naming**: Ok this is kind of Greek to me but I suppose there is a reasoning behind it. I am not sure how Auto Naming works. (Stay tuned)

i) Once this is all complete at the bottom of the page you can select **Add New Folder** or choose **Cancel**.

5.2.2 Manage Folder

By selecting **Manage Folder** from the **Actions** pull down menu of a **Folder** page, you will bring up a **Modify Folder** as shown below.

![Figure 61 - Modify Folder Page](image)

From here you can do everything that you could when you added a folder. (See above) When your selections are complete you can choose to **Submit Changes**, **Cancel** or **Save and Archive Folder**. (Again, not knowing exactly what Archive means, I would not recommend using this.)

5.2.3 Add Subfolder

By selecting **Add Subfolder** from the Folder Actions Pull down menu you basically be taken to Add New Folder. (see section 3.2.1 above) The only difference is that it will auto select the parent folder. You can still change it to be at the top of the Group so just be careful where you place the folder.

5.2.4 Move Folder

By selecting the **Move Folder** from the Folder Actions Pull down menu it brings up a window that lets you select the new placement of the folder within the group. (See below.)

![Figure 62 - Move Folder Page](image)

From this page you can use the pull down menus to place the folder where you would like. Then select **Move Folder** to complete the process.

5.2.5 Archive Folder

I find this curious. It does give a confirmation response when you **Archive a Folder**. Then in the reverse you can **Unarchive a Folder**. (Now what this is really doing I don't have a clue. Stand by.)
5.3 Engineering Document Workflow

Document Editors are responsible for keeping all documents in proper SMPTE form following the Administrative Guidelines in the Documents Folder in the Standards Community Group. 

https://kws.smpte.org/kws/Group's/standards_comm/documents

In this section we are going to walk through the usual process as it relates to the Kavi and Standards workflow for an Engineering Document. This would be a Standard (ST), Recommended Practice (RP) or Engineering Guideline (EG) type of document. We are not going to walk through separately the process for; Registered Disclosure Documents (RDD), Administrative Guidelines (AG), Advisory Notes (AN), Engineering Reports (ER) or Document Reviews and Amendments. These workflows are either similar or less complicated and as such can be understood as it applies to the Kavi Workspace.

5.3.1 Document Preparation

Document Editors should be familiar with the Administrative Guidelines (AG)-02 through AG-05 and AG-07. They should also find a copy of ISO/IEC Directives Part 2 which is what SMPTE documents are based from. (There is work ongoing to better describe the areas where SMPTE document differ from ISO Directives. Stay tuned.)

- AG-02 Engineering Documents
- AG-03 Normative References
- AG-04 SMPTE ST and RP Template
- AG-04-2 SMPTE EG Template
- AG-05 XML Schemas
- AG-07 Document Flowcharts

By becoming familiar with these documents and using the templates as starters will help you out considerably moving the document forward. It will also be helpful for this section to have the document flowchart for Engineering documents out as a reference.

It is the document editor’s responsibility to maintain the current set of files during development and during the approval process. When changes are made, always upload a copy of the latest file(s) as a revision or as a new file to the project group’s "Working Documents" folder (or a subfolder if there are multiple projects in a single Kavi Group).

If this is a new project and a new document you will need to obtain a number from HQ via TC Chair. Consider, in conjunction with TC Chair whether there should be a new root number or if the document will be a new part under an existing root number. If a new root number, consider if the document is likely to be unique, or the first of two or more parts under that root number.

Once you have a number you will want to make sure you follow a strict naming convention as specified in AG-02 Section 8.

Ex. 32NF-FCD-RP-2076-1-S3D Sync-2016-03-16.doc

Following development by a project team, such as a Working Group or a Drafting Group, the “Working Draft” (WD) document is submitted for review by the wider audience of the parent Technology Committee. This is part of the informal process and is intended as the final stage of document development.
5.3.2 Working Draft (WD)

Once a document is in Working Draft state, all Technology Committee (TC) members are strongly urged to review the document carefully at this stage, and work towards negotiated agreement on all substantive issues prior to ballot. The objective is a document that will not require further comment at ballot.

When submitting your WD for pre-ballot comment period you want to make sure that good clean copy to add to the TC’s Dropbox folder. When adding the document to the TC follow recommendations listed below.

a) **Insert Document Number:** (without the indicator text) and document title, or a meaningful shortened version of it into the “Title” field. (This is to allow members not familiar with the document number to identify the subject of the document/ballot.)

b) **Technical Contact:** Select the document editor (this is the person who will be responsible for handling comments).

c) **Folder:** “Drop Box” should be selected

d) **State:** select “Working Draft: Draft presented to TC for pre-ballot comment”

Select the appropriate **Project** from the dropdown and click “Add” (if there is also a “group of documents” Project this may also be added.) (*)

f) **Email Notifications:** Do NOT select any Group boxes. In the “CC” box enter the email address(es) of the Chair(s), or you may use the Chair list address as found on the group home page, e.g. 30mr-chair@lists.smpte.org (*)

g) **Submitter Note:** Advise Chair(s) that document is ready for pre-ballot review

h) **Comments can be added by:** should be set to “No one”

i) **Comments can be viewed by:** should be set to “Document Viewers” (this should be the default—please advise if you find folders where this is not the default!)

j) **Add Document**

5.3.3 Pre-Ballot Comment Period for Working Draft

The Kavi comment tool is not generally used for this stage; email and telephone conferences are suggested (Kavi provides comment management only in Approval Ballots). The project team/document editor is encouraged to resolve all comments (with appropriate changes to the document where appropriate), but formal resolution of all comments is NOT required. These comments and responses do not form part of the formal record for the document.

a) Go to “Documents” and alongside the new document in the drop box, select “Details”

b) Select “Modify Details”

c) Check key items (meaningful title, Technical Contact selected, State, Assignment to Project(s), Comment Permissions)

d) Move to “Working Drafts” folder by selecting this folder from the dropdown list

e) Create a Project Activity for TC Review. Select the Working Draft as a “Reference Item” for the Activity. Assign TC to the Activity (alpha search for, say, 35PM, creates dropdown for selection), set start date and end date (2 weeks after start), insert the email address for your TC (e.g. 35pm@lists.smpte.org ) in the “Cc” box. Create text for the notification based on this model:

“The referenced document is circulated for comment prior to FCD ballot. Please use this opportunity to study the document and provide comments. Your comments at this time are advisory, and there will be no formal comment resolution procedure, but your suggestions for improving the document will be most welcome. Please communicate with [document editor xxx@yyy.zzz to comment and discuss]. At this time please also ensure that you have submitted any necessary patent statements in respect of this document.”

(If the project team has planned telephone conferences for discussion, details should be included here.)
f) **Save**
g) (Committee members) Review document, and submit comments as appropriate
h) (Document editor/project group) Review comments

NOTE Generally, the project team/document editor will revise the document based on the comments received. When this process is complete, and the project team believes the amended document is ready for ballot, the document is submitted to the TC Chair as a Committee Draft (CD), and the Chair will request an FCD ballot. Exceptionally, the project team may request a second informal comment period using the same procedure if there have been major changes to the document, and a further review is desired before balloting.

### 5.3.4 Committee Draft (CD)

The project team/document editor has studied all comments from the pre-ballot review and amended the document as considered appropriate. The revised document is sent to the TC Chair as a CD, and the Chair will request an FCD ballot. This is where the Society “goes on the record.” All comments and responses form part of the formal record of the document. The CD may be a single (clean) document, or a zip with the clean document and a redline from the version posted for comment, if this is considered helpful. A revision of a published document always requires a clean document and a redline from the previously published document. These are the only redlines permitted at this stage; to be meaningful the changes shown must be from a version previously published, or previously circulated to the TC. Do NOT include redlines that show iterations within the Project Group.

- a) Select document from your computer using the “Browse”
- b) Insert document title, or a meaningful shortened version of it into the “Title” field.
- c) **Technical Contact**: Select the document editor
- d) **Folder**: “Drop Box” should be selected
- e) **State**: select “Committee Draft: Document to be balloted for elevation to FCD”
- f) Select the appropriate Project from the dropdown and click “Add” (if there is also a “group of documents” Project this may also be added.) (*)
- g) **Email Notifications**: Do NOT select any Group boxes. In the “CC” box enter the email address(es) of the Chair(s), or you may use the Chair list address as found on the group home page, e.g. 30mr-chair@lists.smpte.org (*)
- h) **Submitter Note**: Advise Chair(s) that document is ready for FCD Ballot
- i) **Comments can be added by**: should be set to “No one”
- j) **Comments can be viewed by**: should be set to “Document Viewers”
- k) **Add Document**

NOTE that at this stage it is a very good idea to delete older versions of the document from the Sub Group (though you may wish to retain in your personal files)—this latest version is the output of the informal review process and is available to everyone in the TC; it can cause confusion and/or argument to have other versions lying around!

### 5.3.5 Final Committee Draft (FCD)

When a Ballot is closed and a document has passed the ballot by the requirements per the OM’s it is then elevated to Final Committee Draft or FCD state. This is where the document editor and the Drafting Group begin the work of resolving the comments. If you are really lucky and there are no comments and your document passed it ballot then it automatically becomes a Draft Publication or DP. Congratulations as I have never seen this happen yet.

If you are like the rest of us this is where the work begins. You need to resolve all of the comments from the ballot. You will find directions below in Managing Comments below.

Once you have resolved all of the comments either the normal process or by the two other methods of dealing with comments. One is the non-responsive commenter who just ignores your provided resolution.
This can be deemed a non-responsive comment and the TC chair can then allow you to address those comments and move on. The other is where a commenter will not except your resolution and you and the Drafting Group have found there is no way the commenter will accept your resolution and does not provide an acceptable alternative you can ask the TC for a Disposition Vote to dispose of the comment.

Once all of the comments have been resolved and the Kavi Comment Tracker indicates all comments have turned “green” then your Drafting Group can ask the TC to place your document into a Pre Draft Publication Review.

5.3.6 Pre-Draft Publication (Pre-DP)

The Pre-Draft Publication Review (Pre-DP Review) allows everyone in the TC to review the changes made between the Balloted document and the revised document reflecting the comments that were resolved from the ballot.

This means you should post into a zip file for Pre-DP the FCD document and Track Changes version of the FCD document. Generally, this will be a two-week period for the TC to review and comment. They can only comment on editorial issues and these comment do not need to be resolved. This is generally handled via email and not by adding comments to the Pre DP Review.

When the two-week period is up the Document Editor and the Drafting Group review any new comments and then update any editorial issues they wish to resolve before submitting this for a DP vote.

To submit for a DP vote you should take the zip file that contains the latest redlined document and a clean version and place that into the TC Dropbox folder and indicate to the TC chair to conduct a vote to elevate the document to DP state. This can be done as a voice vote at a TC face to face block meeting or by conducting a ballot via Kavi. This is a yes or no vote and there is no comments accepted.

5.3.7 Draft Publication (DP)

Once the document passes the vote of elevation to DP it is now stable and the only thing left to the Document Editor is to just watch the process and provide documentation as necessary. If it does not pass the vote to elevate it to DP then it is sent back to CD state and restarts the process from there.

Once the DP vote passes, the document is then in a DP state. From here it is up to the TC chair to then take the DP document and provide it to the Standards Committee for an Audit of the process the document went through. The TC chair should create a “Clean” version of the document and set an action item for SMPTE HQ (Mauricio Roldan) to indicate where the Clean version is located and that the document is ready for its ST Audit.

5.3.8 Standards Committee Audit (ST Audit)

The document goes through a three week ST Audit ballot. This is where the ST members review the process that the document has gone. They are looking for any discrepancies in the process to get the document published. They cannot comment on any technical issues. If there are any problems noticed in the process it is then sent back to the TC to correct those errors. If there are no issues, then the document would pass ST Audit and begins its preparation for Publication.

5.3.9 Publishing Preparation

The ST should inform the TC chair, who should inform the Document Editor to create a clean copy of the document that has passed ST Audit and provide that to the Director of Engineering along with and Action Item to do so. (So I won’t forget!) The Director of Engineering will then provide the document to the Home Office (HQ) who will prepare a PDF form of the document to be published. That final PDF is then provided to the Document Editor and The Drafting Group chair(s) to verify that the conversion is correct from the original document and that all formulas, figures and table and associated files or data is correct. Once this review has been completed and there are no more issues then HQ moves the document and files forward into the publication process. This is where metadata tagging is added and it is published into the IEEE Digital Library.
5.4 Managing Comments

To understand the current working of Kavi Comment Tracker it is essential to understand the various roles that committee members can be assigned. A Member who is assigned the role of “Document Editor” in the roster appears on the Group Home Page, and can manage documents and manage comments. When a document is uploaded to the group document repository, a “Technical Contact” maybe assigned.

A Technical Contact may also be assigned (or changed) by Modifying the Document Details (Chairs, Secretaries, and Document Editors have the necessary permissions to do so). The Technical Contact for a document has Document Editor privileges for that document only. So the Technical Contact can assign and address comments on that document. There can only be one Technical Contact for each document.

Usually it is always the document editor that does this work so going forward one should assume that the Document Editor and the Technical Contact are the same as far as Standards work goes.

When the ballot closes (or earlier if wished), the Document Editor should go to the ballot page and select “All Document Comments”. This is critically important—comments from non-voters (Observers) are not displayed by default (and yes, I have complained many times!) Selecting “All Document Comments” also displays a check box alongside each comment, permitting multiple selections (and a check box at the top that selects all).

5.4.1 Update All Comments

A good starting point is for the Document Editor is to select all comments and assign them to themselves. To do this, select “Update” from the drop-down box at the bottom of the comments (shown below) and then select OK.

![Figure 63 - Ballot Comment Results](image-url)

This will take you to the next page (shown below) that allows you to do bulk changes to the comments at once. You can choose to update comments individually which will be described later on however if you have repetitive tasks for comments you may want to use this method.

This does not take away the responsibility of addressing each comment with a response. So no you cannot use this to select Fixed under Response, Update Comments and say your work is done. (Nice try)
If you want to change the assignment, then under “Assigned To” select your name, then “Update Comments”–this will assign all comments to you.

Depending on how you work you can download the comments as explained in Section 2.7.3.1 and go through them offline to return later and update them on Kavi.

5.4.2 Addressing Comments

Most people prefer to address comments online. In this case, select an individual comment like the example below.

Once on the page above the comment detail you are given a couple of links; All Comments | Document Details | Delete Comment. Further to the right you are given a link to Previous Comment in Document.

These will provide you access to view comments or document details if you like.

*NEVER DELETE A COMMENT!* Unfortunately, this is possible (another one of my complaints). Deleting a comment will inevitably provoke a strong reaction from the commenter and probably result in substantial delay!

The Commenter, Document Editor and the Drafting Group should work together so that comments that remain, and responses to them, should capture as succinctly as possible what (in the view of the commenter) was wrong, and either what was done to fix it, or why the editor disagrees.

The Comment Tracker application is not a blog! Discussion should be conducted off line. If discussion makes this appropriate, commenter may withdraw the original comment and (if necessary) submit a re-
Remembering the goal here is to get all comments resolved, you will Add a Response indicating what you have done to address the comment. You may want to supply a redlined document to show the change. You can Choose File next to the Supporting Response File and add a document to your response. (This is a major pain when you want to add a redlined document to all 55 comments you got. Maybe there is a better way I just don’t know.)

a) **Update Comment Category:** This is usually has been pre-selected by the commenter when they submitted their comment. (See section 2.7.1) You can change the category whether it is N/A, Substantive or Editorial if you like or leave it the way the commenter selected it.

b) **Update Comment Assigned To:** The ASSIGNED TO pull down box lets you individually assign the comment to someone. You may have already bulk assigned this as shown above. Generally, this is who the comment is assigned to that will be responsible for resolving the comment.

c) **Update Comment State:** The STATE provides you with following choices; New, Deferred, Assigned, Issue Addressed, Submitter Rejected Response, Submitter Accepted Response, Submitter Withdrawn Comment, Rejection Overridden or Submitter Non-responsive. The descriptions are listed below along with the color coding that displays in Kavi.

Figure 65 - Document Editors View of Comment Details
<table>
<thead>
<tr>
<th>STATE</th>
<th>Color</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>Violet</td>
<td>All comments come in the STATE as New which is self-explanatory</td>
</tr>
<tr>
<td>Deferred</td>
<td>Light Orange</td>
<td>This comment is deferred to a later time. Will need to be addressed before the document moves forward.</td>
</tr>
<tr>
<td>Assigned</td>
<td>Blue</td>
<td>This is when the comment has been assigned to someone.</td>
</tr>
<tr>
<td>Issue Addressed</td>
<td>Yellow</td>
<td>This is selected when the issue has been addressed and a response has been sent to the commenter.</td>
</tr>
<tr>
<td>Submitter Rejected Response</td>
<td>Rose</td>
<td>This is when the comment submitter has rejected the response from the document editor.</td>
</tr>
<tr>
<td>Submitter Accepted Response</td>
<td>Green</td>
<td>This is when the Submitter is happy with the response to his comment and accepts the proposed change by the Document Editor</td>
</tr>
<tr>
<td>Submitter Withdrew Comment</td>
<td>Green</td>
<td>This is where the Submitter decides to withdraw his comment.</td>
</tr>
<tr>
<td>Rejection Overridden</td>
<td>Green</td>
<td>This is where the TC has voted to override a commenters rejected response.</td>
</tr>
<tr>
<td>Submitter Non-Responsive</td>
<td>Green</td>
<td>This is where the Submitter has not responded in the required time to the Document Editors proposed response and the Chair of the TC</td>
</tr>
</tbody>
</table>

In most cases as a Document Editor you will change the STATE to Issue Addressed when you have responded to the commenter. It is rare to choose Assigned unless someone else is going to be responsible for addressing this comment. Deferred is also rare in the case that you have to defer a comment. Bear in mind that you cannot move a document forward with a deferred comment.

The rest of the STATE’s either come from the Submitter or a TC action to Override a Rejection or a TC chair marking a Submitter Non-Responsive.

d) **Update Comment Response**: The last update to be made to Comment is to update the comment Response. From here you have a pull down box where you can choose from: *None, Fixed, Withdrawn by Submitter, Duplicate, Not and Issue, Not germane, Not Fixable or Will Not Fix.*
### Table 2 - Comment Response

<table>
<thead>
<tr>
<th>Response</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>This is self-descriptive, there is no response.</td>
</tr>
<tr>
<td>Fixed</td>
<td>This when the issue raised in the comment has been fixed.</td>
</tr>
<tr>
<td>Withdrawn by Submitter</td>
<td>This is usually selected by the Submitter when they have withdrawn their comment.</td>
</tr>
<tr>
<td>Duplicate</td>
<td>This is a duplicate issue that was raised by another commenter.</td>
</tr>
<tr>
<td>Not an Issue</td>
<td>This is when the comment is considered Not an Issue.</td>
</tr>
<tr>
<td>Not Germane</td>
<td>This is where a comment is considered not germane to the document or technology.</td>
</tr>
<tr>
<td>Not Fixable</td>
<td>This is a response to a comment that cannot be fixed. (ex. &quot;I don't like this…&quot;)</td>
</tr>
<tr>
<td>Will Not Fix</td>
<td>This is a response to the commenter that this issue will not be fixed.</td>
</tr>
</tbody>
</table>

e) **Comment Email Notifications:** Once you have selected the appropriate response you can then select the email notifications for the response to the commenter. (See Below)

![Email Recipients](#)

- **Document Information**
- **Comment Information**
- **Comment History**

NOTE Be careful in selecting these check boxes as most of the times you do not want to notify all members of the TC. Above you will see the default mode that the Email Recipients appear as. Normally you would uncheck the Notify the Comment Owner (Resolver/Assignee) otherwise you are sending an email to yourself in most cases.

f) You do want to check the Notify the Comment Submitter to alert them that you have responded to their comment.

g) When you are complete with all of these steps you can click on the **Submit** button to submit your response. Then rinse and repeat as necessary.
6 Group Secretaries

Secretaries play an important role in the Standards process. They are the ones during the meetings that; track attendance, verify there is a quorum (if required), take the minutes and recording Action Items. Depending on the chairs of each group the Secretaries may also; schedule the meetings, maintain the roster of the group, manage documents, manage comments on documents (this should be the document editors job) , manage projects and act as Moderator for email that comes from outside the group. (I believe that this should be a Group Chairs responsibility.) You can see a list of the Management Privileges given to a Group Secretary in Kavi below.

![Management Privileges](image)

- Contact List - Name listed on Group contact page
- Manage Action Items - Add, edit, and delete group action items
- Manage Attendance - Track attendances and establish meeting quorum
- Manage Ballots - Add, edit, and delete group ballots
- Manage Voting - Add, edit, and delete voting rights for members
- Manage Documents - Add, edit, and delete group documents
- Manage Comments - Add, edit, and delete group comments
- Manage Meetings - Add, edit, and delete group meetings
- Manage Roster - Add, edit, and delete people on the roster
- Download Roster - Download roster information, including email addresses
- Manage Projects - Add, edit, and delete projects for the group
- Manage Publications - Add, edit, and delete publications for the group
- Moderator - Moderates email messages from outside the group
- Group Settings - Edit settings and policies for the group
- Group Notes - Edit notes, charter, public description
- Subgroups - Can add subgroups

Figure 67 - Secretary Management Privileges

We will run through all of these privileges except the ones we have already covered in the Document Editors section 3. Manage Documents, Manage Comments. Please read those sections if you are not familiar with them already. We will not cover Moderator here as well, instead that will be covered below in the Group Chairs section 5. Also as indicated in Section 3 we will not talk about Contact List as it’s just a toggle to expose emails on the Group Page. (Should not be in privileges)

6.1 Manage Roster

When you are given the privilege of managing the roster many more options are given to you. The very first thing you may do is add a member. This can be selected from the Group’s Home Page under Roster or from the Roster Page itself. Towards the top of the page on the left hand side is a green cross and next to it a New Member link. If you click on this or from the Home Page link you will be taken to a new page. (See Below)

6.1.1 Add Member

From the Add New Member and Send Notification Page, you can select from a list of eligible New Member names to lookup and choose from. It works a little weird because you have to either type in and then hit lookup to see if it matches or narrows the list below. Once you have selected someone that is on the list you then must hit lookup again to select them. (You are really not looking them up anymore but oh well…)
Once the name is selected then you can Assign them a **Role** [Chair (Stds), Committee Secretary etc.] from this page. You can change the role later on. (See Below)

You can select their **Interest Category** or select their default that they choose when signing up for the parent group. It is best to let them decide and just use their default. You can always change this later as well. (See Below)

The last thing you need to do before making them a new member is to choose whether to notify the membership of this new member or not. We are usually nice to our Group’s and keep the email traffic down, always choose No, I will do that later.

Once this is complete then you can click on the button labeled **Add New Member**.

---

### Figure 68 - Add New Member Page

#### 6.1.2 Roster Page

By selecting the Roster link from the Group’s Home Page provides you a Roster page that allows you to; Add a new member, Deactivate a member, Assign Interest Category (usually they have a default), Assign
a role, Export Roster, Export a Vcard or a member, Create a Meeting Attendance Report, Create a Voting Participation Report, or Create an Eligible Voter Report. (See below.)

Test Technology Committee

From this page you can view, configure and get reports about your group.

6.1.3 Deactivate a member

From the Roster Page you have the ability to remove a member from a group. This is labeled Deactivate under the column MANAGE. From here if you select someone for Deactivation then they will be removed from the group when you click on Submit Changes. They will have to sign up for the group again if this was not intended.

6.1.4 Assign an Interest Category

Generally, as mentioned above the Member selects their interest Category. You can change it here if they request, by using the pull down box to select the proper Category or --- which equals none. Once you click on Submit Changes then your changes will take effect.

6.1.5 Assign a Group Role

Assigning a Group Role has two selections.
a) The first being the pull down box. (Oh Crap! So many choices!!) Yes, don't freak out, just calmly select ONLY the following; Chair (Stds), Document Editor, Committee Secretary, Observer or Participating Member. This assigns the roles and thus the privileges. Usually one falls into a certain role, for example most of the folks will be Observers or Non-Voting members with more relaxed rules. The next is Participating Members who are voting members. The others are self-explanatory of their roles.

b) The second being a check box that says chair next to it. This is to select the members email to receive mail sent to Contact Chair. Ex. test_tc-chair@lists.smpte.org

6.1.6 Roster Reports
Within the roster page you can create and download various reports.

6.1.6.1 Download Roster or VCARD
Towards the top of the Roster Page in the middle is an EXPORTS: SPREADSHEET | VCARD with links. If you click on SPREADSHEET you will download a .csv file with all of the information or if you click on the VCARD you will get Vcards for each of the members.

6.1.6.2 Meeting Attendance
When you click on the MEETING ATTENDANCE right next to the Reports it will take you to a new page.

![Meeting Attendance Report]

From this page you can choose from pull down boxes to filter the display of information. You can also toggle between, By Company or By Person for which sorting you want to use to display the results.
You are also given links to view Voting Participation, (see below) select the Attendance Manager (see section 4.3 below) or Download a Spreadsheet of the displayed information in a .csv file.

6.1.6.3 Voting Participation

When you select the Voting Participation link it will take you to a page that displays the members voting participation. (see below)

![Voting Participation Page](image)

From this page you can download a .csv file of the information. You are also allowed some means of filtering the results. You are also provided a link back to the Meeting Attendance as well in case you like to hop around.

6.1.6.4 Eligible Voters

According to SMPTE’s OM’s different roles have different voting rights. Observers for example do not have voting rights but can comment on any ballot. Participating members must not miss two meetings in a row and must not miss voting on more than three ballots in a row.

Kavi gives you tools as a manager of the group to filter the member to see who is eligible according to these rules. Now these rules only apply to TC’s so when it comes to other Group’s this does not matter. (So why does it show up in Working Group’s and Drafting Group’s? I ask the same question…)

If you click on the link from the Roster Page you will get a display of all the Eligible Voters. (see Below)
Figure 72 - Eligible Voters Page

From this page you can change the Calculation Method over on the right hand side by selecting either Meeting Attendance or Voting by Role. You can then download a .csv file of the results.

6.2 Manage Meetings

To set up meetings or events as Kavi calls them, can be a complex task. First you must find a time that most of the group can attend, especially if it is TC meeting and a quorum is required. You also need to watch in some cases, how many days you need in advance before you can hold a meeting. (TC’s and potentially WG’s)

6.2.1 GoTo Meeting

It usually is the job of the chair at the end of each meeting to set the meeting schedule. From there they may choose to set the meetings or pass this on to the Group Secretary. In any case the first item needed if it is not a face to face meeting is to get a GoTo Meeting set up. This is presently scheduled through HQ at the moment. (Were looking into a system that would allow chairs to set up their own Web Conferences. It is helpful to set these up with either a recurring or a couple to schedule so that it is not so Ad Hoc if you can.

Once you have the Web link and Dial in number you can copy the information to schedule a meeting using Kavi.
6.2.2 Add Event

From the Group’s Home Page you can select Add Event under the Calendar column on the right or you can select Calendar from under the Group’s name and once on the Calendar page you can select ADD EVENT from the top left hand side to bring up the Add Event Page. (See Below)

![Add Event Part 1](image.png)

This page is broken into four parts; Add Event, Text Fields, Referenced Items and Send Email Notifications. You will notice that there are required fields marked with an asterisk (*) that must be filled.

For the most part the default settings are probably correct for your event. Below is a table showing the fields and their criteria.
### Table 3 - Add Events

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name*</td>
<td>Give your meeting a name. Ex. 32NF-80 Drafting Group</td>
</tr>
<tr>
<td>Location</td>
<td>If there is a physical location, Web or Phone Conference.</td>
</tr>
<tr>
<td>Starts*</td>
<td>Choose the Date and Time of the meeting start. You can also select if it is</td>
</tr>
<tr>
<td></td>
<td>an all-day event.</td>
</tr>
<tr>
<td>Ends*</td>
<td>Choose the Date and Time of the meeting end.</td>
</tr>
<tr>
<td>Time Zone*</td>
<td>Select the time zone of the meeting start and end time. Ex. If you have</td>
</tr>
<tr>
<td></td>
<td>programed the above Start and End for Los Angles times then select the</td>
</tr>
<tr>
<td></td>
<td>Pacific Time Zone.</td>
</tr>
<tr>
<td>Repeating Options</td>
<td>Does this meeting with the same information recur? You can select an</td>
</tr>
<tr>
<td></td>
<td>interval from the pull down menu.</td>
</tr>
<tr>
<td>Event Type*</td>
<td>They give you lots of options here but your meetings are usually always Web</td>
</tr>
<tr>
<td></td>
<td>or Face to Face.</td>
</tr>
<tr>
<td>Submitter Contact*</td>
<td>This is you the person creating the meeting. This allows people to blame</td>
</tr>
<tr>
<td></td>
<td>you for what went wrong.</td>
</tr>
<tr>
<td>Request RSVPs*</td>
<td>Do Not Request RSVPs this just creates unnecessary email traffic.</td>
</tr>
<tr>
<td>Attendees can Record</td>
<td>We always allow the attendees to record their own attendance, cause we're</td>
</tr>
<tr>
<td>Their Attendance*</td>
<td>lazy. If you want to be strict or you like extra work you could say no and</td>
</tr>
<tr>
<td></td>
<td>then you have to do manually at the meeting.</td>
</tr>
<tr>
<td>Voter Eligibility*</td>
<td>If your group is a TC then this matters and you want to say Yes. All else</td>
</tr>
<tr>
<td></td>
<td>leave this at No.</td>
</tr>
<tr>
<td>Related Projects</td>
<td>You should select which Project this Event belongs to as this will help</td>
</tr>
<tr>
<td></td>
<td>update your project page.</td>
</tr>
</tbody>
</table>

The next two sections of the Add Event Page is the **Text Fields**. This allows you to paste in the Web and Dial-in information into the first area. The second is where you can place an agenda for the meeting or if you like you can add a document in the next section as a **Reference Item** for an Agenda or supporting documents for the meeting. (See Below) I find its best to add the Agenda to the Text Box even if you have a document.
At the end of the page you are allowed select and send out an email notice of the event. This of course will only go to the Group, you can also add in cc: email addresses and submit a Note that goes out with the email.

Once you click on Add New Event at the bottom of the page it will send out an email (if selected) along with an ics Invite and also place the event on the Kavi Group Calendar.

Congratulations you have just set up a meeting. Make sure you go and check it on the Group Calendar and look at the Event details to make sure everything got published correctly. By doing this from the Group’s Home page or the Group’s Calendar page you will be able, with your privileges, to; Download, Modify, Delete, Cancel or Track Attendance. (See Below)

![Event Information – Secretary View](image)

Figure 75 - Event Information – Secretary View

Downloading has been described before in Section 2.4.5.

### 6.2.3 Modify Event

If you click on the Modify link above the Event Name it will take you back to an Add Event page with the existing information included. From there you can modify any of the elements and then Submit Changes and the Event will be updated.

### 6.2.4 Delete Event

By clicking on the Delete link you will be taken to a page that allows you to REMOVE the event from the calendar. Make sure you want to do this. Sometimes it is better to Cancel a meeting instead so that folks will get a notice that a meeting is Canceled. This selection is for when you no longer want this event to appear on the Group’s Calendar.

From this page you can also send out an Email notification. Use your best judgement.

### 6.2.5 Cancel Event

When a meeting has been scheduled for a while and for some reason it must be canceled it is best to use this method. Select the Cancel link from the Event page and it will give you page where you can cancel the event and send out email notifications. I always recommend sending out an email notification to the group when you cancel the meeting. It provides them with a ics link as well.
6.3 Manage Attendance

6.3.1 Track Attendance

From the Event information page you can select TRACK ATTENDANCE which will take you to a page that allows you to record or modify the meetings attendance. (See Below)

<table>
<thead>
<tr>
<th>Name</th>
<th>Company</th>
<th>First Name</th>
<th>Last Name</th>
<th>Current Voting</th>
<th>Event Voting</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>Individual</td>
<td>Howard</td>
<td>Latik</td>
<td>Voter</td>
<td>Voter</td>
<td>Committee Secretary</td>
</tr>
<tr>
<td>Yes</td>
<td>SNFTE</td>
<td>Howard H.</td>
<td>Latik</td>
<td>Voter</td>
<td>Voter</td>
<td>Participating Member</td>
</tr>
<tr>
<td>Yes</td>
<td>SNFTE</td>
<td>Peter</td>
<td>Gynes</td>
<td>Voter</td>
<td>Voter</td>
<td>Chairperson</td>
</tr>
<tr>
<td>Yes</td>
<td>EEU</td>
<td>Hans</td>
<td>Joistman</td>
<td>Voter</td>
<td>Non-Voter</td>
<td>Participating Member</td>
</tr>
<tr>
<td>Yes</td>
<td>Girgisen</td>
<td>Matthew</td>
<td>Goldman</td>
<td>Non-Voter</td>
<td>Non-Voter</td>
<td>Observer</td>
</tr>
<tr>
<td>Yes</td>
<td>LAKM</td>
<td>Paul</td>
<td>Trevasse</td>
<td>Non-Voter</td>
<td>Non-Voter</td>
<td>Observer</td>
</tr>
<tr>
<td>Yes</td>
<td>Milog Media Technology LLC</td>
<td>William</td>
<td>Miller</td>
<td>Voter</td>
<td>Non-Voter</td>
<td>Participating Member</td>
</tr>
<tr>
<td>Yes</td>
<td>SNFTE II</td>
<td>Mauricio</td>
<td>Riddian</td>
<td>Non-Voter</td>
<td>Non-Voter</td>
<td>Staff/Advisor</td>
</tr>
<tr>
<td>Yes</td>
<td>Unaffiliated Individual</td>
<td>Alan</td>
<td>Lamstayed</td>
<td>Non-Voter</td>
<td>Non-Voter</td>
<td>Observer</td>
</tr>
<tr>
<td>Yes</td>
<td>Worldlink Broadcast Engine Consulting LLC</td>
<td>J. Peterson</td>
<td>Woodell</td>
<td>Voter</td>
<td>Non-Voter</td>
<td>Participating Member</td>
</tr>
<tr>
<td>Yes</td>
<td>Warner Bros.</td>
<td>Wendy</td>
<td>Aylsworth</td>
<td>Non-Voter</td>
<td>Non-Voter</td>
<td>Observer</td>
</tr>
</tbody>
</table>

To cater to the needs of various users, this page offers different functionalities such as adding or removing attendees, updating or deleting their status, and controlling access permissions.
Once you have selected the Track Attendance Page you will be able to see some of the details of the Event and then be given a way to search and find attendees. You are then allowed to update their status to whether they attended or not. This is done with a check box next to their name.

You can also view or hide the Observing Attendees by clicking on the link next to the label.

6.3.1.1 Manual Attendance Entry

You are given a method to manually enter in someone’s information if they were not a member of the group. For this you need to provide the Company name, First and Last Name and select an Interest Category if necessary.

Once you have updated all you need to on the Track Attendance Page then you can click on the Record Attendance on the bottom of the page to update all the attendance information.

6.3.2 Meeting Attendance Manager

There is one more curious tool you are given with your Meeting privileges and that is the Meeting Attendance Manager. Translated this allows you to bulk select your meeting bad boys and girls and change their status with one click of the mouse. (Oh feel the awesome power that is Kavi…) But seriously unless you are a TC secretary, and you have to enforce the meeting attendance rules for voting, you will never have to use this. Even if you are a TC secretary you still may just do this with Roster by each individual. But in case you do want to explore this function here you go. (See Below) You can get to this page from the Meeting Attendance Report Page which provides you a link to this page.

![Meeting Attendance Manager](image-url)
From the Meeting Attendance Manager page, you can set the criteria for the report and filtering to find the members that you are looking for. This is done with a have NOT / have pull down box with number boxes associated with it. Once you have selected your criteria then you can either Configure Attendance Report which will filter the display below or export a .csv file of the report.

Once you have your list pared down then you can select individuals by checking the box next to them. This will then apply the bulk action selected down at the bottom. This is where you can; Modify Role, Deactivate Membership or Cancel.

If you used this method more than likely you would be modifying roles, for example, moving people from Participant to Observer. Before you do this the Chair of the group should have had a conversation with the member. There are many reasons why folks have missed meetings and votes and it is up to the Chair to make the final decision.

You could use this do bulk deactivate membership if you wanted…I would ask if you have had a very bad day.

6.4 Manage Action Items
The management of Action Items has already been covered to some extent above in Section 2.8. The Secretary is able to use all of the privileges that a members Assigned an Action Item, they can also Add and Delete Action Items.

6.4.1 Add Action Item
The Add Action Item page allows you to give the action item; a Subject, Description, Comment, Owner, Priority, Due Date, Related Projects and the ability to add a reference item. Once that is all complete then you can select between email notifications and the complete the process by clicking on the Add Action Item. (See Below)

![Figure 78 - Add Action Item Page](image_url)
6.4.2 Delete an Action Item

From the pull down arrow on the right hand side of an Action Item you can choose to delete action item. Only do this if this action item is a mistake. By selecting that link you will be given an Action Item Details page with a Delete Action Item on the bottom of the page. By clicking on that button you will delete the Action Item. (See Below)

![Delete Action Item Page](image)

6.5 Manage Projects

Projects may be initiated at the request of a person or body not currently active in SMPTE Standards. In such cases the request should be made in writing to the Standards Vice President, who will assign the project to a TC, and ask the TC Chair(s) and the Director of Engineering to assist in gathering details for the Project Approval process.

More commonly, a project is initiated at the request of one or more active TC Members—usually in the correct TC. The Standards Vice President should be consulted if there is doubt as to the correct TC. Note that the Standards Vice President, as advised by the Standards Committee, is responsible for TC allocation, and the TC may be changed as a result of the Project Approval process.

A Project is usually intended to create or revise a single document, and there MUST be a Project for each document. Occasionally it may be beneficial for an “umbrella” Project to be created to provide a unified view of a document collection under common management. Such a Project may be used to track overall progress of the multiple documents (and their associated Projects).

A Project will normally be associated with one TC, the consensus body for the associated document(s). This is accomplished by assigning the corresponding Kavi Group to the Project, and selecting it as the Consensus Body. The Standards Committee (ST) will be also be assigned for Project Approval and subsequent audit. Additional Kavi Group’s may be assigned, including a Working Group with
responsibility for the project and any Drafting Group(s) working on elements of the project. Once a Project is approved, Public Visibility will be added, revealing a subset of the Project content to the world.

In the old days we did not have projects as it was mentioned above. We used to have Work Statements and then Sub Group’s. Now we have Projects that are linked to Group’s or Sub Group’s. When creating a Project and having it go through the approval process as far as Kavi is concerned it is still a cumbersome process. (Yes were working on it.) For now the best suggestion is to use a standard document like a work statement to collect all of the information. Currently ST has AG-06 that is a Project Planning Sheet. From there you will be able to copy in the rest of the information once it has been reviewed and updated. Kavi is not the best mechanism at the moment to facilitate this interaction.

Adding and Managing Projects is mostly the Group Chairs responsibility, however the Group Secretary is given the same privileges as the Chair to allow them to share the responsibilities if they want. This arrangement should be worked out so that someone is ultimately responsible for keeping the project updated.

When Adding a Project, it is better to clone an existing one first if you can. You will see in this chapter that we will show you how to Manage a Project first then how to Clone a Project and then finally how to Add a Project. (Seems a bit backwards but…you’ll see.)

6.5.1 Project Overview

From the Project Overview page (see section 4.11.1 to Viewing Project Overview) using the actions pull down arrow on the right hand side you are given the ability to; edit overview, add document, add project activity, mark complete, deactivate and clone project. A lot of power for a Secretary, I would not ever choose to mark complete, deactivate or clone a project. I see that as a Group Chair role, but since we are here we will cover these topics. We will not cover add document here as that has been done before and should be simple to you advanced users of Kavi.

6.5.2 Edit Project Overview

When selecting the Edit Overview from the Project home page you will be given a super long new page that allows you to fill in tons of information. This page is broken into; Basic Information, Project Fields, Resources, Related to this Project and Email Notifications.
6.5.2.1 Basic Project Information

The Basic Information is as it says basic and is self-explanatory. It includes; Name, Project Type, Progress Report, Description, Percent Complete, Start Date, Estimated Completion Date and Completion Date. (See Below)

![Figure 81 - Project Overview Basic Information](image)

You will want to always leave the Project Type as SMPTE Engineering Project (ANSI). (I would think that this would be the same as down below; WG, DG, SG, TF etc. Some day we will get this locked down.) Anyway The Name should match the short name of the parent group it is linked to with a short description of the work it is doing. You should give a basic description of what the project is about. (Ex. 32NF-80 New Time Clocks)

The Progress Report and the Percent Complete should be updated regularly if you are a good SMPTE Standards citizen…not all of us are. This is helpful to let the general public know where the project is on its timeline.
6.5.2.2 Project Fields

The Project Fields are broken down to the following table along with the descriptions of what should be entered for each field. Below you will see the section of the Kavi Page for Project Fields and then following that a table with the specific information required for each field.

<table>
<thead>
<tr>
<th>Project Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Name</strong></td>
</tr>
<tr>
<td><strong>Project Code</strong></td>
</tr>
<tr>
<td><strong>Project Type</strong></td>
</tr>
<tr>
<td><strong>Project Team</strong></td>
</tr>
<tr>
<td><strong>Project Status</strong></td>
</tr>
<tr>
<td><strong>Project Date</strong></td>
</tr>
<tr>
<td><strong>Project Notes</strong></td>
</tr>
</tbody>
</table>

**Figure 82 - Edit Project Overview – Project Fields**
Table 4 - Project Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project States</td>
<td>This gives you a pull down selection of states that the project can be in. Select the most appropriate usually Proposal when it is started.</td>
</tr>
<tr>
<td>Reports to:</td>
<td>This should be the parent group of this work. Ex. WG or TC number.</td>
</tr>
<tr>
<td>Project Type:</td>
<td>This is selection between WG, DG, SG, TF or Individual. (Should not allow individual if you ask me.)</td>
</tr>
<tr>
<td>Chair</td>
<td>The name of the chair of the project. (This should be a pull down list)</td>
</tr>
<tr>
<td>Proponents:</td>
<td>The names of the proponents. This should also reflect Company names to if companies are proponents. For an RDD this is the organization sponsoring the work.</td>
</tr>
<tr>
<td>Secretary (Optional):</td>
<td>Say Optional but every Group except Drafting Group’s usually have one. If so list that person of the Group here.</td>
</tr>
<tr>
<td>Document Editor:</td>
<td>Pretty self-explanatory however if this is a WG you may not have one. (Should say Optional as well)</td>
</tr>
<tr>
<td>Problem to be solved:</td>
<td>Or as I like to call it the Peter Dare question. A 500 word (max) statement about the main problem being addressed.</td>
</tr>
<tr>
<td>Project Scope:</td>
<td>A specific scope for the proposed work.</td>
</tr>
<tr>
<td>Specific Tasks:</td>
<td>A high-level list of tasks that need to be completed as the work progresses. Consider test material, sample bitstreams, sample software, inter-op tests etc.</td>
</tr>
<tr>
<td>Form of output:</td>
<td>Check the box that applies.</td>
</tr>
<tr>
<td>External Liaisons:</td>
<td>Any known external liaison that should be included.</td>
</tr>
<tr>
<td>Additional external liaisons:</td>
<td>Other external liaisons that did not appear above.</td>
</tr>
<tr>
<td>SMPTE TC liaisons:</td>
<td>Add any other SMPTE TC’s that should be a liaison to the project.</td>
</tr>
<tr>
<td>Known references:</td>
<td>List any known Standards, RP’s or EG’s that will be referenced for this project.</td>
</tr>
<tr>
<td>Document root number(s) allocated by HQ:</td>
<td>Document numbers are usually assigned before Pre-Ballot review and must be assigned before the FCD ballot. It is useful to assign the document root number early in the process. For new documents in an existing document suite, enter the root document number. For new projects leave this blank.</td>
</tr>
<tr>
<td>Patent Declaration Received?:</td>
<td>If the work has known Intellectual property Rights (IPR) that should be disclosed as soon as possible. Yes or No answer.</td>
</tr>
<tr>
<td>Patent declarations:</td>
<td>HQ adds these declarations when they are received. The SMPTE Director of Engineering will add these as appropriate.</td>
</tr>
</tbody>
</table>

6.5.2.3 Resources

Every Project needs to have at least a minimum a Project Contact*. This is someone selected from the group it is assigned to.

(This is a mystery of how you assign it again. Hit Lookup many times? Nope in this case you need to just highlight the name in the pull down list. Kind of lame...as you don't get a positive feeling you have selected someone.)
It also needs to select a group as a Consensus Body, this is usually the parent Group which is usually a TC. Sometimes it may be a WG which in that case you can choose it depending on how much the WG stays with Due Process. Ultimately it lies with the TC.

The next field is the Group’s which allows you to select Group’s to view your project. By using the drop down box to select a group and then clicking add you will give that group visibility into your project.

Some Group’s will allow you to enable them to submit contributions to your project. This is done with a check box on the left hand side of the group listed. Check to allow and do not check to disallow.

You are also given the opportunity to remove Group’s as well. By clicking on the Remove button you will remove that group from viewing and submitting contributions.

![Figure 83 - Edit Project Overview – Resources, Relationships and Email](image)

### 6.5.2.4 Related to this Project

If you want to create a link between two projects this is where you can select and add. You can remove afterward as well. (It would be nice if you could select a Parent/Child relationship for linkage).

### 6.5.2.5 Email Notifications when updating Project

When you are all finished updating your project you can send out email notifications to the Project Contact, or Assigned Chairs. You can also cc: email address’ by adding them in a text box and you can submit a note that goes along with the email.
When you have completed all of your changes to the project you are then allowed to Save, Deactivate or Cancel your changes. Please DO NOT DEACTIVATE! That should only be done by a chair and only if there was a mistake. If a project has stalled, then it is up to the parent group to decide what to do.

6.5.3 Project Activities

Project Activities are usually milestones that are used to track progress with a project. Given the Secretary privileges you are allowed to Add a Project Activity, Edit Project Activities, Mark Complete and Delete Project Activities.

6.5.3.1 Add Project Activity

By selecting add project activity you will be presented with a page as shown below.

![Add Project Activity Page](image)

**Figure 84 - Add Project Activity Page**

From this page you need to fill out the appropriate information for the Activity. There are two mandatory fields and that is the Project Activity Name* and the Start: and End: Dates.
You should also supply a Description of the Activity that is less than 750 characters. This should just be a very brief description. Along with any Assigned Owner(s) you want to add. You can also attach a reference item like a document if you choose.

There is a Status selection whether this Activity is complete or not. You will most likely come back and update this. Once all these items have been addressed you can choose to have an email reminder before the Activity starts and also notify the Project Contact or the Assigned Group Chairs of this Activity.

### 6.5.3.2 Edit Project Activity

By choosing **EDIT PROJECT ACTIVITY** from the Project Activity Details page or by using the pull down arrow to select **edit** from the Project Activities Page you will be given the same page show above in Add Activity however this time with all the information filled out. From here you can edit the information and save again.

### 6.5.3.3 Mark Project Activity Complete

The easiest way to Mark a Project Activity Complete is by using the pull down arrow to the right of each individual Activity in the Project Activities Page. By selecting **mark complete** you will change the status of the activity and you will be given an window that allows you to send out email notifications about the status change.

You can also change the status of the Activity using the **Edit Project Page** as well.

### 6.5.3.4 Delete Project Activity

You SHOULD NOT be deleting Project Activities unless they are a mistake. If you have to then you can do this from the Project Activity Details page. You will be given a warning page that allows you to send out email notifications about the deletion.

### 6.5.4 Mark Project Complete

When a Project is finished there is a mechanism to Mark the Project Complete. From the Project Overview page using the actions pull down box you will be exposed to a **mark complete** link. If you click on that you will bring up a window that allows you to mark the project complete and send out email notifications. (See Below)

![Figure 85 - Mark Project Complete Page](image-url)
6.5.5 Deactivate/Activate Project

There is a method to Deactivate the Project with an inverse function to Activate it again. DON’T DO THIS unless instructed by the Chair.

From the Project Overview page using the actions pull down arrow you will find a link labeled either deactivate or activate depending on the status of the project. Clicking on that will automatically change the state and give you an email notification window. (See Below)

![Figure 86 - Deactivate Project Window](image)

From this page you can choose to Send or Don’t Send an email notification. To change the state back repeat the same steps above.

6.5.6 Clone Project

Cloning a Project allow you to start with an already existing Project and then updating the information as required for your new project. From the Project Overview Page using the actions pull down arrow you will see a link labeled clone project. If you click on this link it will make a clone and present you with a window in which you can give it a new name and either Submit or Cancel your action. (See Below)

![Figure 87 - Clone Project Window](image)
6.5.7 Add a Project

Yes, we put adding a project at the end of the chapter. You will probably modify an existing Project before you add a new one…but then again maybe not. Anyway…the first thing you can do if you have to add a Project is to see if there is a Template Project in your Group that you can access and clone. That will give you a running start. (See Clone Project above) Even if you clone a project you will want to grab a copy of AG-06 as a worksheet. It can help you round up the information you will need and then make it easier to add and verify.

![Figure 88 - Group Projects Page](image)

From the Projects Page you can click on the actions pulldown and click on the add project link. This will bring up the following page. (shown below)
All of these fields will look familiar from the sections above, so I will not repeat each field here. This page also gives you Email Notifications which allows you to select who will receive and email notice with the creation of the new Project.

When you are done filling out each field clicking on Save on the bottom will create your new Project.
Group Chairs

As far as Kavi is configured at this moment, Group Chairs or Chairs (Stds) includes everyone who is a chair of a: Working Group (WG), Drafting Group (DG), Study Group (SG), Technology Committee (TC) or Task Force (TF). They all have the same role for management privileges. (See Below). (I think that these privileges should be changed and be segmented between TC and TF chairs vs. all other chairs.)

<table>
<thead>
<tr>
<th>Management Privileges</th>
<th>What items can this person manage (add, edit, &amp; delete for the group)?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact List</td>
<td>Name listed on Group contact page</td>
</tr>
<tr>
<td>Manage Action Items</td>
<td>Add, edit, and delete group action items</td>
</tr>
<tr>
<td>Manage Attendance</td>
<td>Track attendance and establish meeting quorum</td>
</tr>
<tr>
<td>Manage Ballots</td>
<td>Add, edit, and delete group ballots</td>
</tr>
<tr>
<td>Manage Voting</td>
<td>Add, edit, and delete voting rights for members</td>
</tr>
<tr>
<td>Manage Documents</td>
<td>Add, edit, and delete group documents</td>
</tr>
<tr>
<td>Manage Comments</td>
<td>Add, edit, and delete group comments</td>
</tr>
<tr>
<td>Manage Meetings</td>
<td>Add, edit, and delete group meetings</td>
</tr>
<tr>
<td>Manage Roster</td>
<td>Add, edit, and delete people on the roster</td>
</tr>
<tr>
<td>Download Roster</td>
<td>Download roster information, including email addresses</td>
</tr>
<tr>
<td>Manage Projects</td>
<td>Add, edit, and delete projects for the group</td>
</tr>
<tr>
<td>Manage Publications</td>
<td>Add, edit, and delete publications for the group</td>
</tr>
<tr>
<td>Moderator</td>
<td>Moderates email messages from outside the group</td>
</tr>
<tr>
<td>Group Settings</td>
<td>Edit settings and policies for the group</td>
</tr>
<tr>
<td>Group Notes</td>
<td>Edit notes, charter, public description</td>
</tr>
<tr>
<td>Subgroups</td>
<td>Can add subgroups</td>
</tr>
</tbody>
</table>

Figure 90 - Group Chair Management Privileges

As you can see they include all privileges except Manage Voting and Manage Publications. (Whatever that is. We’ll get back to you.)

As a Group Chair and especially as a TC chair you should be familiar with all of the previous roles privileges and responsibilities. If you have skipped all other chapters and started here we assume that you have already mastered all of the previous tasks of the different roles for Kavi.

Sub Group’s

Sub Group’s or sometimes referred to as just “Group’s” are the basic building blocks of the hierarchy of the Standards Community. At the top of the food chain is the Standards Committee (ST) which is run by the SVP of Standards. This group supervises the work that is done by the Standards Community (SC). In the Standards Community there are Technical Committees (TC) which then can create different Sub Group’s to divide up the work as they see necessary. To see a graphical representation of this structure one can look at the recently published AG-07.

The section below walks you through the Kavi process for setting up these Group’s.
7.1.1 Creating Sub Group’s

With the Chair privileges one can set up a Sub Group on Kavi. Please do NOT Create a Group. Instead ask SMPTE HQ (Mauricio Roldan) to set up a Sub Group for you. (see below)

NOTE Currently the Administrator(s) CANNOT DELETE A GROUP so please be sure that you want to create a group and have the proper approval before doing so!

From the Home page of the Group you are wishing to create a Sub Group, directly under the Group name you will find on the very right hand side a link called SETTINGS. If you click on this link it will take you to a new page shown below.

![Figure 91 - Group Settings Page](image)

From here you can select the ADD SUB GROUP located below the SETTINGS link. This should take you to the Add Group page shown below.
This Page is broken into three major categories: **Add Sub Group; Charter, Notes and Descriptions;** and **Policies.**

### 7.1.1.1 Add Sub Group

Each Sub Group requires a: **Group Name**, an **Abbreviated Group Name**, a **Mailing List Name** and a **Group Chair**.

a) **Group Name** should describe the general purpose of the Sub Group. (ex. TC-32NF-40 DG – ST 297 Revision)

b) The **Abbreviated Group Name** usually has the following convention; TC short name-Sub Group name-brief work effort name. (ex. 32nf-40_ST297rev).

c) The **Abbreviated Group Name** is automatically the same prefix used for the **Mailing List Name.** If you wish it to be different then you should enter that into the **Mailing List Name.**

d) You will need to select a **Chair Person** for the group. This person has to already be a member of the TC or the WG already. If you desire to have a new member take on this role you will want them to sign up for the Parent group first before you create the Sub Group.
7.1.1.2  Sub Group Charter, Notes and Descriptions

This is the area where you will provide text that appears on the Sub Group’s Home Page. Here you can define the Sub Group Charter, provide the Note that appears on the Sub Group’s Home page to non-members. The Description appears on the Sub Group’s Home page to the members of the Sub Group.

7.1.1.3  Sub Group Policies

The Policies for the Sub Group are already set by the Administrator. There is a link provided for you that will help you generate an email to the Kavi Administrator(s) for the Standards Community. This section provides you with a list of the Policies in place for this Sub Group for your reference.

Once you have completed filling out all of the required (*) fields then you are given the option at the bottom of the page to Create Group or Cancel by clicking on either button.

7.1.2  Merging Sub Group’s

If for some reason you wish to merge two Sub Group’s you should probably consult the Director of Engineering as there are a couple of ways to do this. Modifying, Sharing, Deactivating, Renaming and Bulk Imports can only be done by the Kavi Administrator(s).

7.1.3  Closing Sub Group’s

Sub Group’s should be closed after they have completed their work. Usually this is done with the consensus of the parent group. Kavi Group’s are not really closed by are Deactivated which in a sense archives them. This is done so that it is possible for the Administrator(s) to look up historical information or re activate a group if it necessary.

7.2  Group Settings

As with other elements on Kavi there are different ways to get to some of the categories below. All of these can be accessed by clicking on SETTINGS from the Group’s Home Page. (See Figure 92 above.) Other settings can be accessed by selecting View Charter. (See Below)
From here you get a good overview of the Sub Group and choose Edit to the right of Charter and Public Description to be able to edit those categories.

You will also notice in this case that there is a Download Charter Document link on this page. This is the case where after you have created a Sub Group you can add a Charter Document. You will see this process below.

### 7.2.1 Change Group Defaults

By selecting **CHANGE DEFAULTS** from the Group’s Settings Page it will provide you a Group Defaults page. (See Below)

![Change Group Defaults Page](image)

From this page you can select the Group Defaults for; **Email Notifications**, **Event Type***, **Document State***, **Folder*** and **Time Zone***. These are the default values that will be preselected when group members fill out forms such as Add Event, Add Document and Add Ballot.
a) **Group Default Email Notifications**: This section allows you to select the events that you will automatically select to send an email to the group. You can select none or any combination of these by checking the box next to the listed events.

b) **Group Default Event Type**: This section allows you to select only one type of default for any Events created for the group. You must choose one of the types.

c) **Group Default Document State**: This section allows you to select only one type of default for any Document that is added to this group. You must choose one of these States.

d) **Group Default Folder**: This section allows you to select only one default Folder that documents maybe submitted to if you are not a Group Secretary or Group Chair. Normally this is the Dropbox folder but it can be whatever folder has been created for the group previously.

e) **Group Default Time Zone**: This section allows you to select only one type of default for the Time Zone that group normally operates in. You must choose one of these Time Zones.

f) Once all your selections are made you can choose to either **Submit Changes** or **Cancel** by selecting the appropriate button at the bottom of the page.

### 7.2.2 Edit Group Tabs

By selecting the **EDIT TABS** link from the Group Settings Page it will bring up the Edit Tabs Page. (See Below)

![Figure 95 - Edit Tabs Page](image)

From this page you can select which Tabs are displayed on the Group’s Home Page. Selecting **Submit Changes** at the bottom of the page those changes will take effect.
7.2.3 Edit Group Templates

From the Group Settings page, you can select **EDIT TEMPLATES** which will bring up the Edit Templates page. (See Below)

![Edit Group Templates Page](image)

From this page you can edit the pre-selected HTML or Text that appears in the emails that are sent out when a member wishes to join a group and the approval or denial text that will be sent by the Chair of the Group.

As a general rule DO NOT CHANGE these! If there are special circumstances that would require you to change these, you should seek approval from the TC chair and Director of Engineering.

a) **Join Template**: This section allows you to change the **Body** of the email that is sent out to a request to Join a group. This uses HTML language and as such some understanding of HTML should be know before modifying this Template.

b) **Approval Template**: This section allows you to change the **Subject** and the **Body** of the email message sent upon approval of the Group Chair to the person requesting to join the group. Both of these use normal text for both items.
c) **Denial Template:** This section allows you to change the **Subject** and the **Body** of the email message sent upon denial from the Group Chair to the person requesting to join the group. Both of these use normal text for both items.

### 7.2.4 Edit Group Charter

As mentioned above this page can be reached from either the Group’s Home page or from the Group’s Settings page. Either way it is selected it will take you to the Edit Group Charter Page. (See Below)

![Figure 97 - Edit Group Charter Page](image-url)
From this page edit the Group’s charter and also upload an existing document with an expanded charter if required.

a) **Group Charter**: This allows you to edit the original Group Charter that was submitted at the time that the Sub Group was created. You can modify the text in the Charter text box.

b) **Charter Document**: The following items below the Charter text box allows you to upload a Charter Document and provide the link text that will appear when someone is looking at the View Charter Page. (See Figure 94 above) I will not go through all of the steps and items as this should be understood by viewing the page. (As this is hardly every used, I am going to let you figure it out.)

### 7.2.5 Edit Group Notes

As mentioned above this page can be reached from either the Group’s Home page by selecting View Charter and then clicking on **Edit** next to **Public Description** or from the Group’s Settings page by selecting **EDIT NOTES**. Either way it is selected it will take you to the Edit Group Notes Page. (See Below)

This page provides two text boxes that allow you to modify the Group Note and the Group Description.

a) **Edit Group Note**: This section allows you to edit the Note that is displayed to members of the Group on the Group’s Home page.

b) **Edit Group Description**: This section allows you to edit the Group’s Description on the Group’s Home page that is displayed to the members of the Group.

c) When your edits are complete you can make them active by selecting the **Submit Changes** button on the bottom of the page.
7.3 Email Moderator

Kavi has spam filters that trap email that comes from those that are not allowed to post to a Group's email reflector for obvious reasons. If you click on Email from the Group’s Home page it will take you to a page that allows you to view all of the email that has been posted to the group. (See Figure 44 Group Email List)

When you have Group Chair privileges you will also see two new selections to the right of a Reports icon towards the top of the page, **MESSAGES AWAITING MODERATION (#)** and **ALLOWED POSTERS**. Clicking on the **MESSAGES AWAITING MODERATION** page will take you to the Edit Moderation Panel shown below. Clicking on the **ALLOWED POSTERS** link will take you to an ACCESS DENIED page. (So forget that one as I have no idea why it's there if your Access is Denied.)

7.3.1 Messages Awaiting Moderation

**Email Moderation Panel**

<table>
<thead>
<tr>
<th>DATE/TIME</th>
<th>LIST</th>
<th>SENDER</th>
<th>SUBJECT</th>
<th>ACTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015-03-07 15:10:28</td>
<td>TC-10E DG Dynamic Metadata for Color Transforms of HDR and WGC Images</td>
<td><a href="mailto:daniel.young@oshiba.com">daniel.young@oshiba.com</a></td>
<td>RE: CTA lastname request to SMPTE for ST-2094</td>
<td>accept</td>
</tr>
<tr>
<td>2015-07-06 14:53:14</td>
<td>TC-10E AHG Reference Display and Environment for Critical Viewing of Television Pictures</td>
<td><a href="mailto:jdhouston.cahn@cloud.com">jdhouston.cahn@cloud.com</a></td>
<td>Re: [10e-xpm] Comment 08956 on FCD-ST 2090-3</td>
<td>accept</td>
</tr>
<tr>
<td>2015-10-27 15:02:31</td>
<td>TC-10E SG on HDR Ecosystem</td>
<td>graham.cradock@yostme...</td>
<td>Please add me to the HDR mailing list</td>
<td>accept</td>
</tr>
<tr>
<td>2015-10-29 16:37:58</td>
<td>TC-10E SG on HDR Ecosystem</td>
<td>contact@softsolutionslima...</td>
<td>RE: SMPTEF Publics Study Group Report on High-Dynamic-Range (HDR) Imaging Ecosystem</td>
<td>accept</td>
</tr>
<tr>
<td>2015-10-30 17:54:26</td>
<td>TC-10E SG on HDR Ecosystem</td>
<td><a href="mailto:chr@insightmedia.info">chr@insightmedia.info</a></td>
<td>I would like to join the discussion</td>
<td>accept</td>
</tr>
<tr>
<td>2015-10-30 22:25:19</td>
<td>TC-10E SG on HDR Ecosystem</td>
<td><a href="mailto:dperrigo@yahoo.com">dperrigo@yahoo.com</a></td>
<td>Question about definition of Simultaneous Contrast in HDR report</td>
<td>accept</td>
</tr>
<tr>
<td>2015-13-01 16:08:59</td>
<td>TC-10E SG on HDR Ecosystem</td>
<td><a href="mailto:newsletter@boomlibrary.au">newsletter@boomlibrary.au</a>...</td>
<td>BOOM Library 3FOR2 Sound FX special</td>
<td>accept</td>
</tr>
<tr>
<td>2016-03-01 15:37:57</td>
<td>TC-10E SG on HDR Ecosystem</td>
<td><a href="mailto:nospills@boothlibrary.b">nospills@boothlibrary.b</a>...</td>
<td>New SFX library: Destruction</td>
<td>accept</td>
</tr>
<tr>
<td>2015-12-31 13:05:53</td>
<td>TC-10E SG on HDR Ecosystem</td>
<td><a href="mailto:no-reply@1-opweb-a2host.imranet">no-reply@1-opweb-a2host.imranet</a></td>
<td>Account Notification</td>
<td>accept</td>
</tr>
</tbody>
</table>

**Figure 99 - Email Moderation Panel**

From the Email Moderation Panel, you are given the option of selecting a group of emails by ticking the boxes next to them and then applying a bulk action of **accept | reject | delete**, or you can do this on an individual basis by choosing a similar action that appears to the right of the email.

By choosing **accept** you will allow the email to be sent out to the group. By choosing **reject** it does not allow it to be sent to the group. (Who knows what else it does, send a bounce notice, you have been rejected notice?) By choosing **delete** it will delete the email.
7.4 Manage Ballots

Ballots are an electronic means of voting via Kavi. Generally speaking, Ballots are a Written Consensus Vote (see OM section 4.3) which permits comments and must meet certain qualifications to vote and to pass. This is the normal process for Engineering Documents that happens at the TC level and requires a member to have a Participant status in order to vote. Any other members can add a comment to such a ballot but their vote is not allowed on the Ballot. This process uses the Add Approval Ballot method described below.

Another type of vote that can be conducted by electronic means is an Administrative Vote. This type of Ballot is called a Written Vote which may be conducted via Kavi that does not allow comments and requires voters to have a Participant status in the group and only requires a majority to pass. This later “Ballot” is typically not the norm and uses the Add Ballot method described below.

There is also an Informal Ballot or what I call a “Straw Poll” Ballot which, for example, is issued by the Director of Engineering for quarterly meeting attendance. This specific Ballot is not something that the Group Chairs have to create but gives an example of the use of a Ballot to capture information formally.

To help with the “Ballot” process one can create templates within their Group’s to help streamline their Ballot Process. This will be described later on.

As with other processes in Kavi there are different ways to start the Ballot process. From the Group’s home page you can access the separate Ballot processes that are listed under the BALLOTS link. This is probably the quickest way. You can also select the top gray BALLOTS link that will take you to the All Ballots in this Group Page. From there you can use the gray actions pull down link to access the multiple Ballot processes. If you are creating an Approval Ballot you can also select the option, create approval ballot, from the ACTIONS pull down menu to the right of a document.

7.4.1 Add Approval Ballot

This is the method that is used for the approval steps of an Engineering Document. Before starting this PAY PARTICULAR ATTENTION TO THE DOCUMENT NAME. This should follow the convention stated earlier in Section 2.5.4.2 that follows AG-02.

Everything should be included in the package that is proceeding to Ballot and if there is more than one document (Track Changes version, Clean version, Sample Code etc.) this should be placed into a zip file with the proper naming convention. BEFORE STARTING A BALLOT MAKE SURE YOUR BALLOT PACKAGE IS IN ORDER.

7.4.1.1 FCD Ballot

This Ballot is the first formal Ballot for an Engineering Document and is usually set up for 3 to 5 weeks. Generally speaking, this should only have a “Clean” version of the document and any associated documents such as sample code, schema or test materials that are a part of the Engineering Document. The document state listed in the naming convention should be Committee Draft (CD) as the document is to be voted to become a FCD document. (Ex. 10E-CD-ST-2094-40-DynMetadataApp4-2016-04-12)
7.4.1.2 DP Ballot

This Ballot is a vote to elevate the FCD document to Draft Publication and is usually set up for 3 to 5 weeks. There should not be any technical comments at this time only editorial if any. This Ballot package must have a “Clean” version and a Track Changes version of the document and any associated documents such as sample code, schema or test materials that are a part of the Engineering Document. The document state listed in the naming convention should be Final Committee Draft (FCD) as the document is to be voted to be elevated to a DP document. (Ex. 10E-FCD-ST-2094-40-DynMetadataApp4-2016-04-12)

7.4.1.3 ST Ballot

This Ballot is prepared by either the SVP or the HQ staff, and is voted on by the Standards Committee (ST). This is the formal vote to ensure that due process has been observed throughout the Balloting process.

As mentioned before one can start the process of an Approval Ballot different ways. If you start from the Group Home Page and select the link add approval ballot it will take you to a page similar to the one shown below.

![Add Approval Ballot Page](image)

This will show you all the documents for that group that are available to be included in an Approval Ballot. By selecting the add ballot link it will then take you to the same location if you used the create approval ballot from the action pull down next to a document as shown below.
Once you have landed on this page you will want to check the information provided for the; File Name, State, Title*, Question** and the Document for Approval categories are correct. If not, you will want to modify them to be correct. From there you will want to fill out the rest of the fields that are required. [Designated by an asterisk(s)] Fields and there descriptions are shown below.

**Figure 101 - Add Approval Ballot Step 1 of 2**
<table>
<thead>
<tr>
<th><strong>Field</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title</strong></td>
<td>This is the title of the Ballot that was automatically inserted from document title. You will need to modify this to add whether this is a “FCD,DP or RDD” Approval.</td>
</tr>
<tr>
<td><strong>Question</strong></td>
<td>This is the Ballot Question that will need to be modified as well to designate what type of Ballot it is. (Ex. …be approved as “FCD, DP or RDD”.</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>If you want you can include a description of the Ballot in this Text Box.</td>
</tr>
<tr>
<td><strong>Instructions</strong></td>
<td>This is a pull down menu that allows you to select between; None Selected, Informal, Administrative Vote, FCD Ballot, Withdrawal Ballot, Meeting Registration, ST Audit, DP Vote or RDD. Of course when Balloting an Engineering Document you should only choose between FCD, DP or RDD.</td>
</tr>
<tr>
<td><strong>Ballot Options</strong></td>
<td>Under this category you have three voting options that you can select how comments are treated for each type of vote. For Engineering Documents you should always choose the following: Affirmative – Optional; Negative – Required; Abstain – Optional.</td>
</tr>
<tr>
<td><strong>Document for Approval</strong></td>
<td>This should have a copy of your document package that is up for ballot.</td>
</tr>
<tr>
<td><strong>Opening Date</strong></td>
<td>Select the date and time you wish your voting to begin. Usually we have it open at midnight.</td>
</tr>
<tr>
<td><strong>Closing Date</strong></td>
<td>Select the date and time you wish your voting to close. Choose the same time that you used to Open the voting.</td>
</tr>
<tr>
<td><strong>Time Zone</strong></td>
<td>Select the Time Zone you want the ballot operate in. Generally we use US/Eastern Time.</td>
</tr>
<tr>
<td><strong>Meeting Attendance Rules</strong></td>
<td>Kavi allows you to enforce the meeting attendance rules for voting. Generally we do not select to enforce this and instead allow the Voter Eligibility of the Group’s to enforce eligible voters. DO NOT CHECK the box to enforce rules.</td>
</tr>
<tr>
<td><strong>Voter Management</strong></td>
<td>Leave this as its default; No, do not automatically manage the voter list for this ballot.</td>
</tr>
<tr>
<td><strong>Official Ballot</strong></td>
<td>Check “Yes” if this is an official Ballot.</td>
</tr>
<tr>
<td><strong>Commenting Permissions on Approval Document</strong></td>
<td>This is left in its default mode of; Comments can be added by – Document Viewers and Comments can be viewed by – Document Viewers.</td>
</tr>
<tr>
<td><strong>Re-voting Support</strong></td>
<td>For all Engineering Documents we allow the ability to change your vote up until the time the Ballot closes. Be sure to check the button to allow “Voters can change their votes while the ballot is open”</td>
</tr>
<tr>
<td><strong>Related Projects</strong></td>
<td>Be sure to select the related Project for this ballot. You will be given an pull down box from which to choose from. If your document has not been related to a project in the first place it will not appear in the pull down box. Once selected in the pull down box you will then need to click on the add button to actually include the project. It will then appear below the pull down box if added.</td>
</tr>
<tr>
<td><strong>Results Sharing</strong></td>
<td>Normally we select to share the results of the ballot with Members of this group. Check this box.</td>
</tr>
<tr>
<td><strong>Results Availability</strong></td>
<td>The default is usually left checked as “Available as soon as the ballot opens”</td>
</tr>
<tr>
<td><strong>Results Style</strong></td>
<td>The default is usually left checked as “Show a detailed list of voters and their votes.”</td>
</tr>
</tbody>
</table>
The last items that will need attention are the Email Notifications and if a Reference Item needs to be added to the Ballot as seen below.

![Figure 102 - Approval Ballot 2nd Part of Step 1 of 2](image)

From the bottom of this page one can set up email notifications that occur during the ballot. This is always a good thing to do and normally on a 5 week ballot they are set about two weeks apart and then about a day or two before the ballot closes.

A reference item can be added to the Ballot as well if necessary. By clicking on this link it brings up a window that allows you to add an existing document or upload a new document. (See Below) Generally this is not used except when creating an informative ballot.

![Figure 103 - Add Reference Item Window](image)
Once you are completed filling out all the information on this Step 1 of 2 page at the very bottom you have two choices; **Save as Template** or **Continue >>**. If you will be making similar ballots you might want to choose **Save as Template**. (See below)

**Figure 104 - Save As Template Window**

From the Save As Template window you can give the Template a name and save it by clicking on **OK**.

If you click on Continue you will be taken to the Step 2 of 2 page that looks similar to the page shown below.
Figure 105 - Add Approval Ballot Step 2 of 2 Page
From this page you can review all of the information and make the choice to go: <<Back, Accept and Add Another >> or Accept>>. Once you Accept and Add Another >> or Accept >> the Ballot will become active and will begin at the time and date that you selected.

7.4.2 Add Ballot

When creating a ballot for something other than for an Engineering Document you should use Add Ballot from the Home Page of the Group. When selecting this you will bring up a page that is very similar to the Add Approval Ballot. (See Below.) So we do not repeat processes that are the same we will only look at those things that are different for this type of Ballot.

Most of this should look familiar if you have read the section before this. If you have a Template that has been previously created, then you might want to select that at the top of the Details to begin the process. Below you will find the items that are different from the Add Approval Ballot.

7.4.2.1 Ballot Instructions

In creating a Ballot other than a for an Engineering Document there are many other possibilities. Right under the pull down box there is a link that will take you to a page that provides you with the text that will be placed in the Instructions of the Ballot for the different selections. Below provides a sample of some of the instructions.
Ballot Options

This type of Ballot gives the Chair the option to have; a Yes, No vote, a Yes, No vote with allow abstention, a Custom vote, a Custom vote with allow “other”. This provides many options depending on the desired results required. (See Below)

![Custom Ballot Options](image)

You can add as many options as you wish by clicking on the green + symbol to the right of the Commenting pull down box. You can also set the option for the voter to select exactly or up too and the number of options. You are also allowed to select if Commenting is: Optional, Required or Not Allowed.
7.4.2.3 Ballot Voter Eligibility

Using the Add Ballot page you are given an extra category, Who Can Vote*. (see below) This allows you to select between: Voting members only, All contribution members of the “Group” or Everyone on the roster of the “Group”.

The rest of the fields should be filled out appropriately with the most notable change is that this should not be checked as an Official Ballot. You can also add a Reference Item which in this case will probably be used.

Once Step 1 of 2 is completed then you are given the same options as the Approval Ballot; Save As Template or Continue >>. By selecting Continue >> it will take you to a new page Add Ballot Step 2 of 2 that allows you to review your information and then provide you with options similar to an Approval Ballot. (See Below) Choose appropriately and your Ballot will be activated and will open depending on the time and date you have chosen.
7.4.3 Change a Ballot

From time to time you may post a Ballot that will need to be changed. Care should be taken that you do not have to do this. You will also want to make sure that changes are minor fixes to an existing Ballot. Kavi allows you to Modify, Amend, Delete, Close or Withdraw a Ballot. If your Ballot is an Approval Ballot, then unless this is minor fix to modify the Ballot the other types of actions should only be done after a discussion with the SVP and possibly approval by the TC.

You should also be aware that you can Modify, Amend or Delete a Ballot whether it is open or closed. If the Ballot is closed your options will be limited and you will not be able to, Close or Withdraw the Ballot.

From the Ballots page if you select an individual ballot by clicking on the Ballot Name it will take you to the Individual Ballot page where it will present you with an arrow Pull Down Box to the left of the Ballot Title. If you click on that arrow it will bring up a Pull Down menu where you can choose between; modify ballot, amend ballot and delete ballot. It also provides you a way to; edit votes, edit eligible voters and view email archive. (See Below) If your ballot is an open ballot you will also see withdraw ballot as an option. (Why view email archive from here??? Who knows)
7.4.3.1 Modify Ballot

Using the method described above, if you select **modify ballot** after it is closed it will take you to a scaled down page similar to the Add Ballot or Add Approval Ballot Step 1 of 2 page. (See Below).

![Figure 112 - Edit Closed Ballot – Step 1 of 2 Page](image)

From here you will only be allowed to change the **Ballot Options**, the **Related Projects**, the **Results Visibility** or the **Results Sharing**. After the changes are made you will click on **Continue>>** which will take you to the next page Edit Ballot – Step 2 of 2 which gives you the chance to review your changes and Accept them.

If you choose to Modify an Open Ballot it will present you a page similar to the Add Ballot or Add Approval Ballot – Step 1 of 2 page and allow you to change everything except the Title*, Question**, the Description** and the Opening Date*. (See Below)

Again after you have completed your changes choose **Continue >>** which will take you to the next page Edit Ballot – Step 2 of 2 which gives you the chance to review your changes and **Accept** them.
Figure 113 - Modify an Open Ballot – Step 1 of 2
7.4.3.2 Amend Ballot

Using the method described above, if you select **amend ballot** it will take you to a scaled down page similar to the Add Ballot or Add Approval Ballot Step 1 of 2 page. (See Below).

Figure 114 - Amend Ballot – Step 1 of 2 Page

From this page you will only be allowed to; change the **Closing Date**, **Add Amendment Text**, select **Related Projects** and issue an **Email Notification** about this modification of the Ballot. After your changes have been made by clicking on **Continue >>** it will take you to the Amend Ballot – Step 2 of 2 page where you can review your changes and **Accept** them.
7.4.3.3 Close a Ballot

Using the method described above, if you select close ballot it will take you to a window where you can select Close an Open Ballot. (See Below). This should only be used if for some reason you have put in the wrong close date and you have exceeded the appropriate time for your ballot. This will be a very rare case. You can choose whether or not to send an email notification out to the eligible voters, that the Ballot has Closed, by checking the box. Once you click on the Close This Ballot the Ballot will no longer be open.

![Close Ballot Window](image)

Figure 115 - Close Ballot Window

7.4.3.4 Delete Ballot

Using the method described above, if you select delete ballot it will take you to a window where you can select Delete This Ballot. (See Below). ONLY DO THIS IF YOU HAVE MADE A SERIOUS MISTAKE IN CREATING A BALLOT. DO NOT DELETE ACTIVE BALLOTS!

![Delete Ballot Window](image)

Figure 116 - Delete Ballot Window

7.4.3.5 Withdraw Ballot

Using the method described above, if you select withdraw ballot it will take you to a window where you can provide text that will appear on the Ballot and the email notice if the box is checked to send to the eligible voters. (See Below). Once this is completed then clicking on the button Withdraw This Ballot will complete the procedure. Again this should only be done under the advice of the SVP and the TC.

![Withdraw Ballot Window](image)

Figure 117 - Withdraw Ballot Window
7.4.4 Edit Votes

You should NEVER EDIT VOTES!!!! There is only one rare case that this may be necessary and that is where for some reason a Participating member could not get into Kavi and sends an email before the closing date with their directions to the Group Chair on which way they would vote had they had access to Kavi. Outside of this rare instance one should NEVER change votes or act as a PROXY. This is not allowed with our current OM’s.

Ok now that the disclaimer is out of the way if you had to accomplish this, from the pull down menu as it was described in section 5.4.3 above select edit votes from the pull down menu. This will take you to the page similar to the one shown below.

![Edit Votes Page](Figure 118 - Edit Votes Page)

From here you can change on an individual basis using the pull down box on the right hand side whether the member has; no vote, Affirmative, Negative or Abstain. You should also provide a comment in the Proxy Comment: Text box as to the reason for you the Chair changed the vote for the individual. When all the changes are complete you can save the changes by clicking on the Submit Changes button at the bottom left hand side of the page.
7.4.5  Edit Eligible Voters

Again you should NOT be changing the Eligible Voters during a Ballot! This should be established given the voting eligibility established for the group. If for some reason (I can’t think of one) you want to change the eligibility for an individual Ballot we will describe the method below.

If you must for some reason want to accomplish this, from the pull down menu as it was described in section 5.4.3 above select edit votes from the pull down menu. This will take you to the page similar to the one shown below.

![Image of Edit Eligible Voters Page]

Figure 119 - Edit Eligible Voters Page

From this page you will be able to select or deselect using the check box on the left hand side of each individual’s name. Once you have completed all of the changes when you click on the Modify Eligibility button at the bottom of the page the changes will take effect.

7.4.6  Manage Ballot Templates

If you, as a Group Chair, make use of Ballot Templates you may from time to time want to manage these. From the Group Home Page there are two ways to get to the page to manage your Ballot Templates. The quickest is to select manage templates that is located under the BALLOTS column. The other method is to first choose SETTINGS and from there select MANAGE BALLOT TEMPLATES. Both of these methods will take you to a page that looks similar to the one below.

![Image of Manage Ballot Templates Page]

Figure 120 - Manage Ballot Templates Page
From this page you can choose to **Edit** your Ballot Templates Name or **Delete** the Template all together.
(You thought you could edit the Ballot Template didn’t you. No you have to create a new Ballot and save that to “edit” a Ballot Template.)

If you click on the **Edit** button, next to the **Template Name**, it will provide you a text box where you can change the Name of the Ballot Template. Once you click on **Submit Changes** it will update your Template Names that you have changed and refresh the page.

Check the box, under the **Delete** column, next to the Ballot Template you wish to delete. When you click on the **Submit Changes** button it will delete all of the Ballot Templates that have been checked and refresh the page to show you the results.
Annex A
(Informative)

Bugs, Questions and Suggestions

A.1 The List

1) Why do pages take so long to load on SMPTE Kavi and not like W3C and ATSC Kavi for example?

2) What is the Inbox looking thingy in the upper right hand corner? I feel like I have to do something with it to empty it out but I have no idea how to do that?

3) Why isn’t the Home Page the Standards Community Page? There is a Home Page which does not give me much and then there is a My Group’s Page that might be useful as well as a Landing Page, but every time I sign in I seem to go to the last place I visited, not to a “Home” page like I would think.

4) When you select Group’s from the Home Page it takes you to My Group’s. I would think that it would take you to ALL Group’s. Instead it goes to My Group’s. The only way to go to All Group’s is to go there from a Sub Group page and select the Member Group’s link in the chain. Ex. Home> Member Group’s > ….

5) Why do I have a pull down box under my name that says Group Settings? This is the same information I have going to My Group’s.

6) Projects are not on every page like Email.

7) Looking to have a bug tracker for Documents. (Projects) Could we change comments on documents to a Bug Tracker that works like comment. We don’t want comments on documents anyway only ballots.

8) Is there a way to separate SMPTE staff, BoG, Nomination Committees from Standards? Each having its on Home Page where others could not go.

9) Why are there so many different Group Roles (ex TC-36, ISO Japan, Chair(stds))? What is the difference between managing documents and managing publications? What are publications as far as Kavi is concerned?

10) Why would you allow the committee secretary role manage comments?

11) Why would the secretary role moderate the email list?

12) Why do we have Technical Contacts, shouldn’t it just be the Document Editors as a role?

13) Why do committee chairs have all privileges except Download Roster, Group Settings and Manage Voting? (whatever that is)? Another words why don’t TC Chairs have all privileges?

14) What is Manage Voting for?

15) What is Group Settings for?

16) Shouldn’t there be some restriction of Roles between Group Chairs and TC Chairs?

17) I would love to see a separate Manage Folders privilege in the Kavi Roles as I don’t think Secretaries should have these permissions. What is the Folder privilege tied to? Manage Documents?

18) What does “archiving a Folder” do?

19) Move folder takes a long time to come up.

20) NEVER delete a comment! Unfortunately, this is possible can we disallow this?

21) Is there any way to bulk add a redlined document to all of your comments as a Response Document?
23) Is there a way to display under your membership account what is the status of all the Group’s you have joined?

24) Need disaster recovery plan. What is our Archive plan?

25) What is Contact List doing in privileges in the Group Roles? It is not a privilege.

26) Why does voting participation show up for non-TC Group’s?

27) Why does Kavi provide a Group Chair a link to ALLOWED POSTERS when clicking on it says ACCESS DENIED?

28) What happens when you choose Reject when moderating email?

29) Why do you have extra Balloting instructions when you are selecting an APPROVAL Ballot such as Meeting Registration?

30) Why can’t I have the ability to edit a Ballot Template instead of having to make a new one and delete the old one?