User guide

Managing Needs and Projects

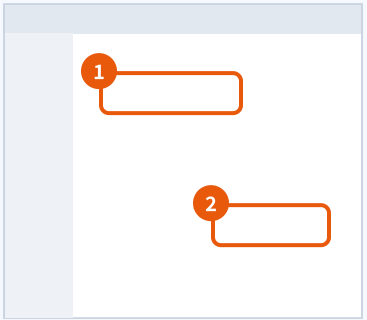
From conditions for raising hands on needs, solutions and seed matching to the project list and commercialization, this guide follows real screenshots step by step.

The screenshots were taken with sample data.

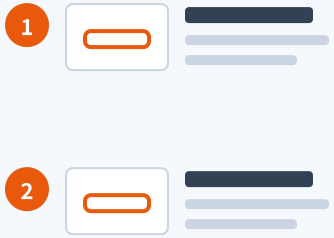
How to read this guide

- Open each screen after choosing the conference in the organizer dashboard.
- The numbered boxes on each screenshot show where to press or type. Read them together with the explanation of the same number in the right-hand column.
- For step-by-step detail, see the web guide, which walks through the real screens.

What a page looks like



A photo of the screen. The numbered boxes show where to press.



The row with the same number shows a close-up of that place and what it does.

Who can use it

- Conference organizers can use these features.

What this guide covers

1 Managing and Matching Needs

Conditions and administrative fees for meeting requests and comments
How often a need is viewed
Market data and regulatory information
Whether to choose automatically (conference setting)
Editing the solutions for a need
Related patents for a solution
Seed matching management (applications and licensees)

2 Project List and Overview

Project list (six stages)
Project list (table)
Project overview

3 From Needs to Commercialization

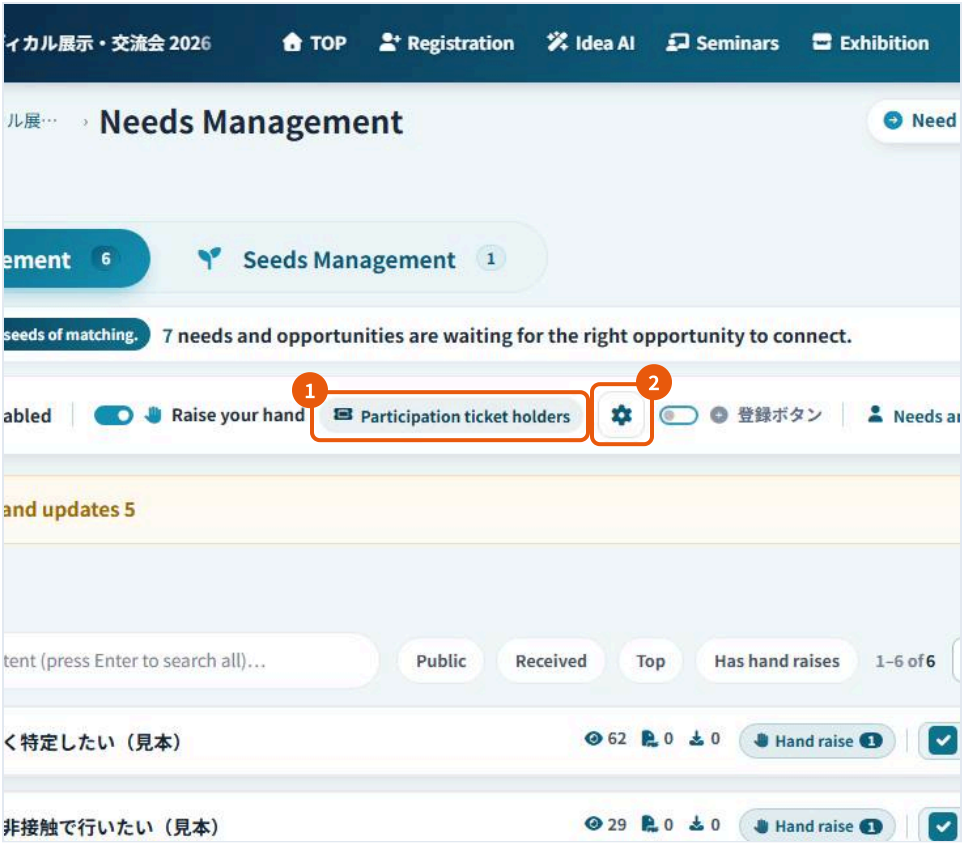
Meeting requests / comments: from the public page and the survey in one list
Find candidates, choose them for a role and reach out
Discussion: conversations with each partner in one timeline
Discussion: choose a conversation and write right there
Files and documents: where, who and in which discussion
Procedure rules: triggers and procedures
Record commercialization milestones

1

Managing and Matching Needs

7 screens

Conditions and administrative fees for meeting requests and comments



1 Participation ticket holders

Current conditions

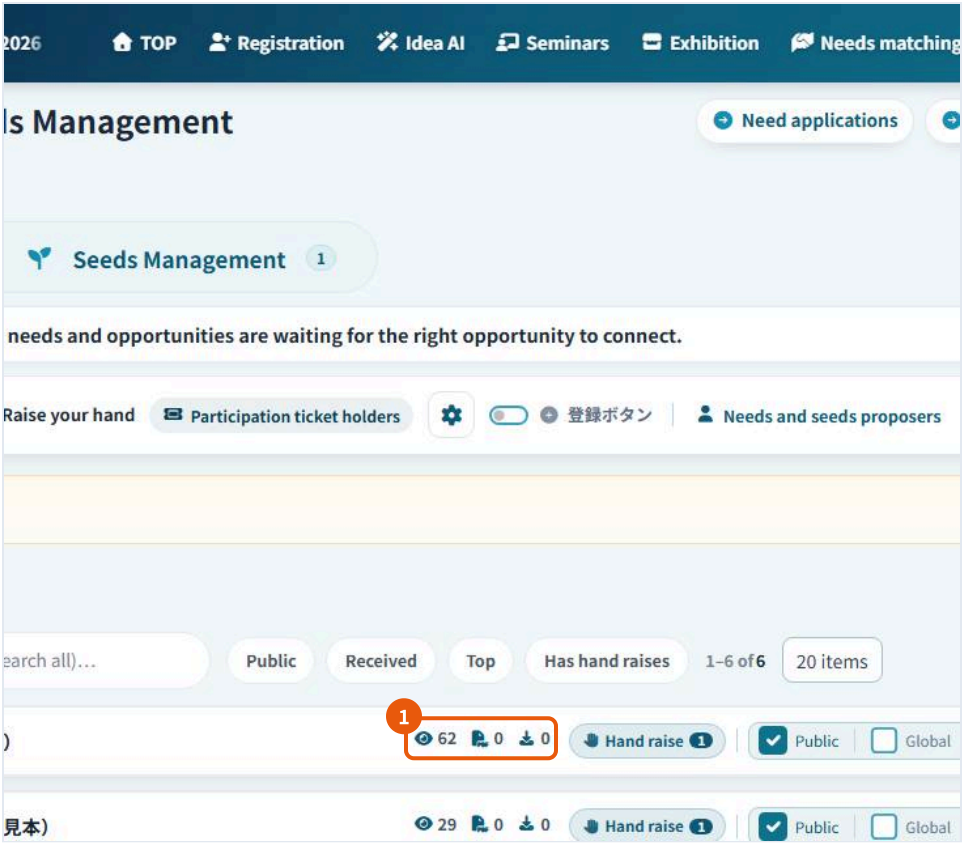
Shows who can send a meeting request / comment and, if set, the fee amount.

2

Press the gear

The meeting request / comment conditions dialog opens.

How often a need is viewed



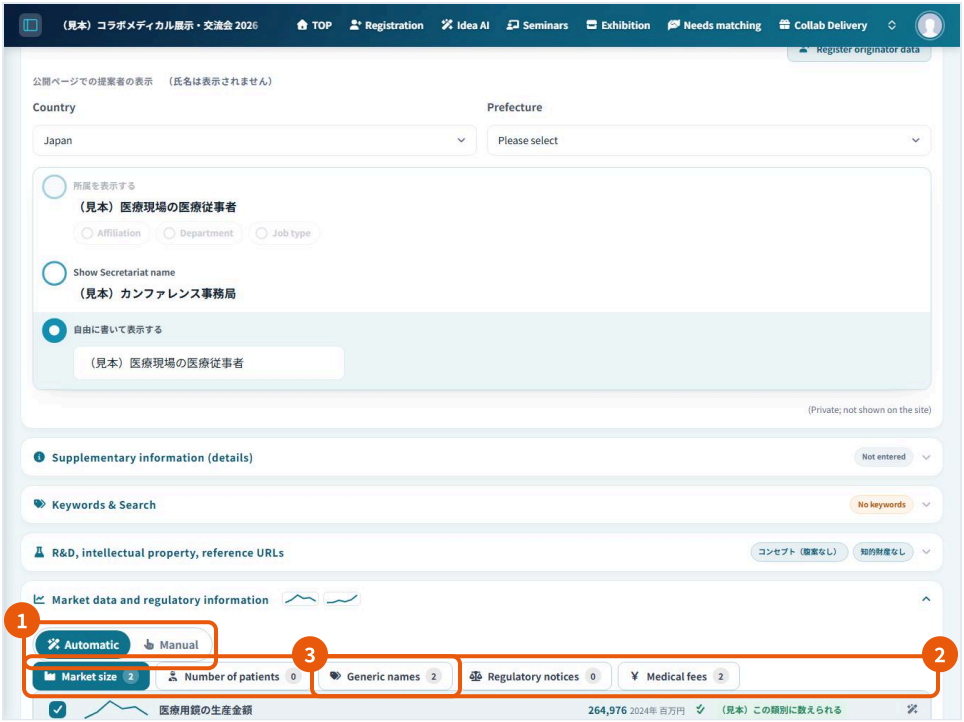
1

62 0 0

Views, opens, saves

The eye is views, the PDF icon is PDF opens and the arrow is saves.

Market data and regulatory information





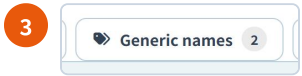
Automatic or manual

In automatic, checked items are shown from the start. In manual, only the ones you tick are shown.



Kinds of data

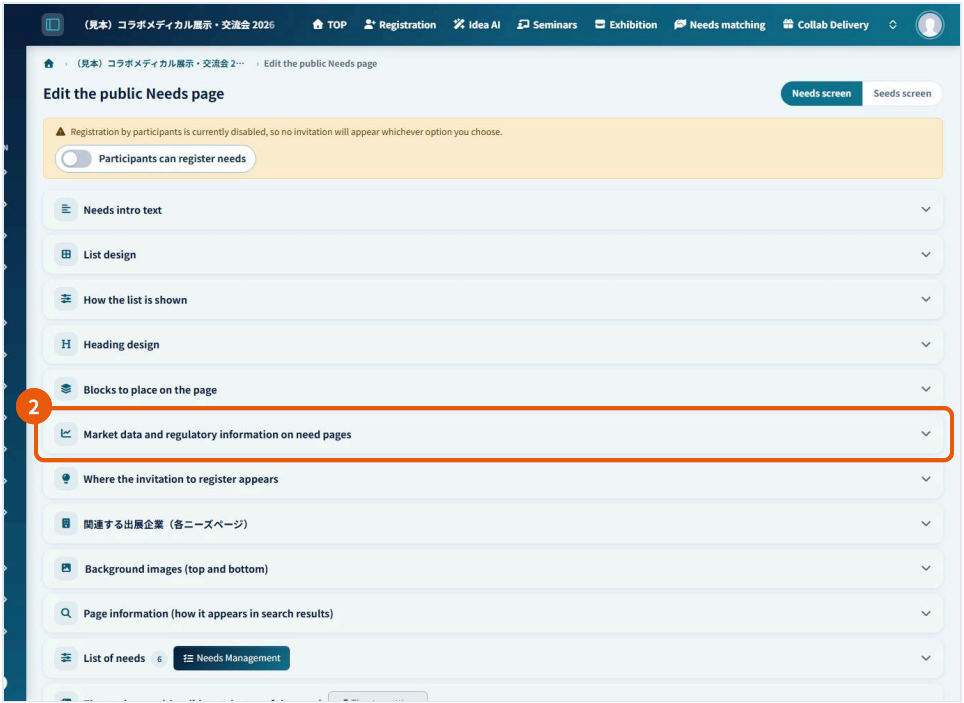
The number is how many are on the public page now.



Generic names

Switch the kind of data.

Whether to choose automatically (conference setting)



1 Market data and regulatory

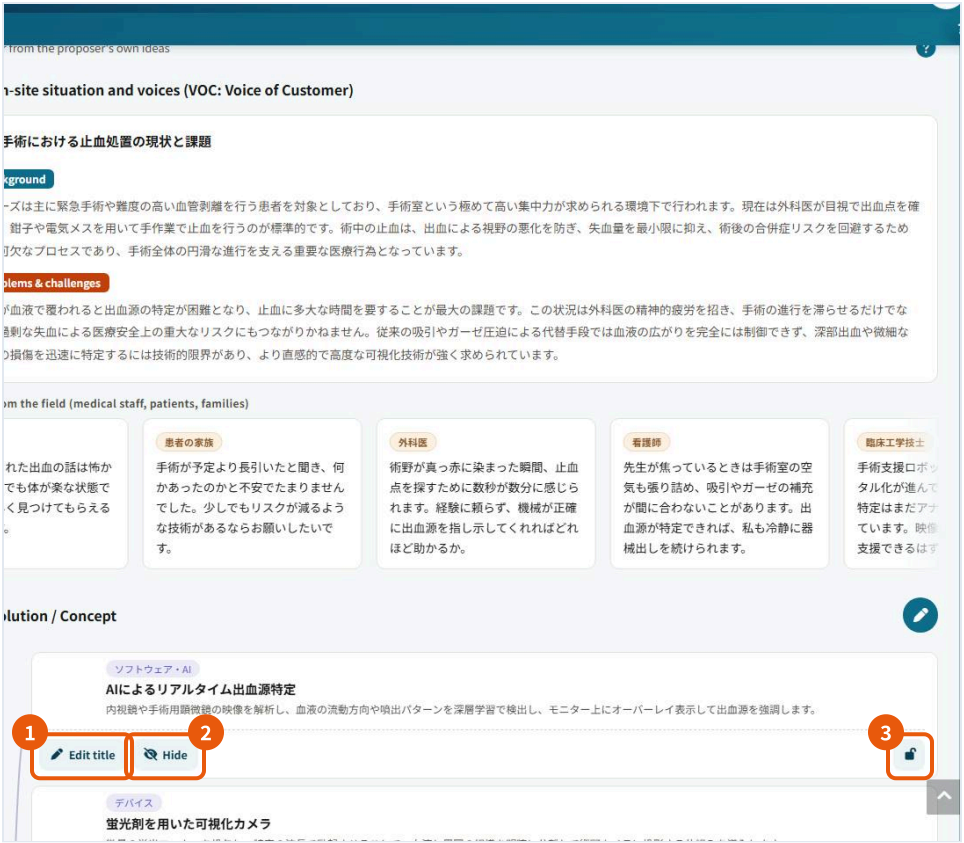
Market data and regulatory information on need pages

Changes are saved as you switch.

2 Market data and regulatory

Opening the panel

Editing the solutions for a need



1 

Rewrite the title
Rewrite the title in place.

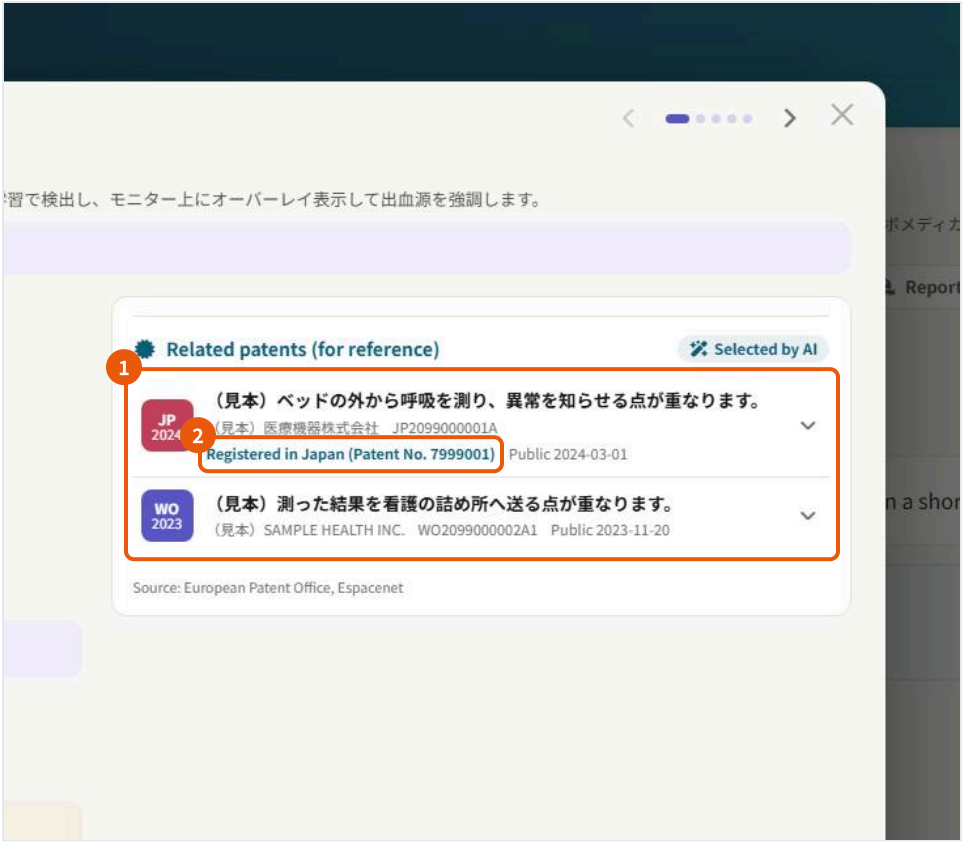
2 

Hide
Hides this solution from the public page.

3 

Lock
Keeps this solution as it is when solutions are regenerated.

Related patents for a solution



1



Press a solution

Press a solution with an evaluation to open the details.

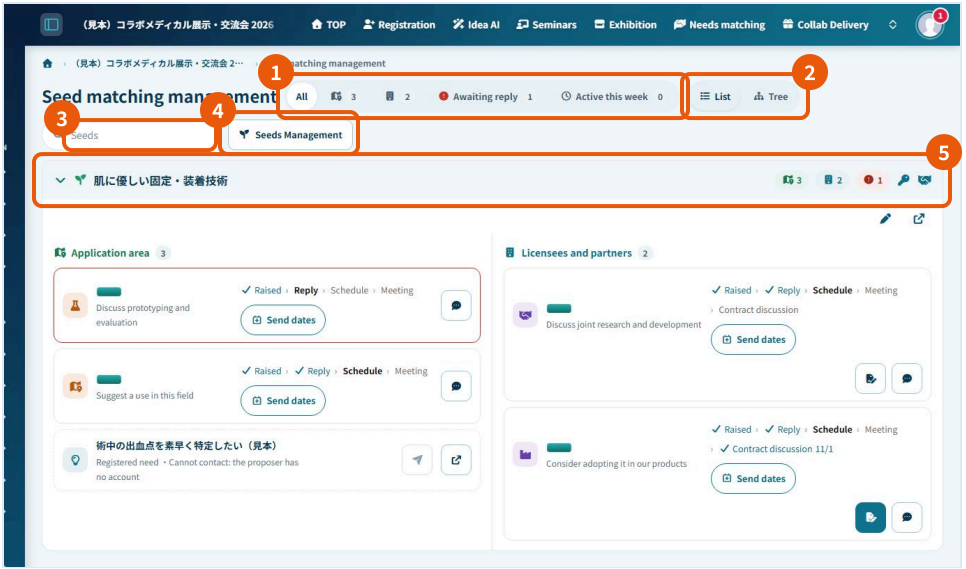
2



Press a patent

Press the summary line to open the original title and the overlapping sentence.

Seed matching management (applications and licensees)



1 All 3 2 Awa

Filter by applications, licensees and partners, or awaiting reply

The numbers count partners. Awaiting reply shows only seeds with someone still waiting for an answer; Active this week shows seeds with activity in the last 7 days.

2 List Tree

List and tree

The tree links each seed to its applications, licensees and partners, the people involved and where things stand. It starts collapsed to the seeds; use the arrow to open one at a time.

3 Seeds

Search by seed name

Type part of the name and press Enter.

4 Seeds Management

Seeds Management

Register and edit seeds from the Seeds Management list.

5 肌に優しい固定・装着技

One row per seed

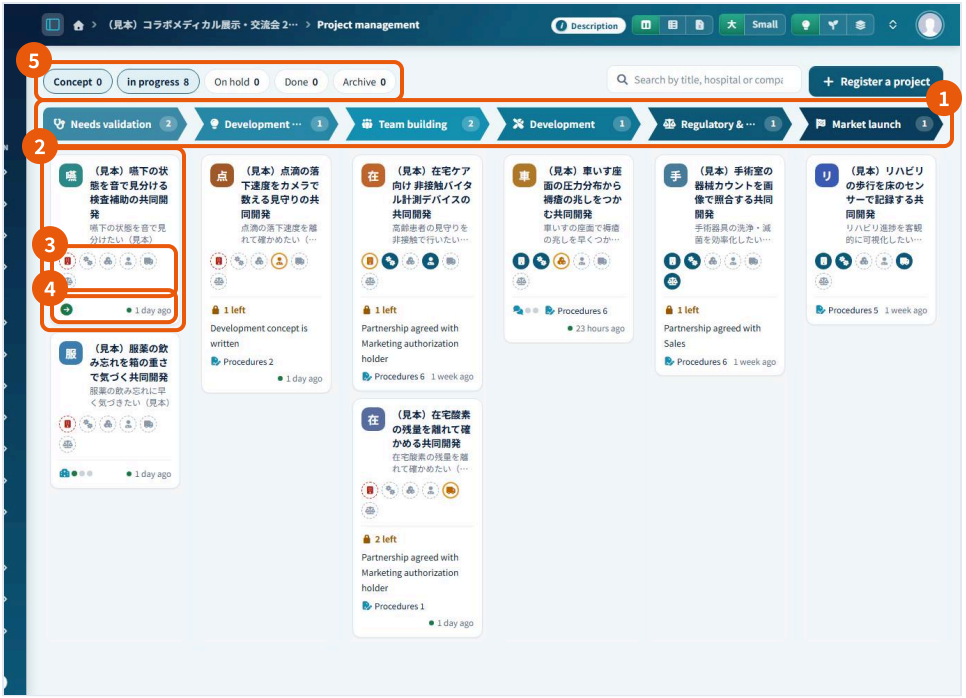
On the right: how many applications and licensees and partners, how many are awaiting reply, and the forms of collaboration wanted.

2

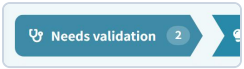
Project List and Overview

3 screens

Project list (six stages)



1



Six stages

Work moves from left to right. The number is how many projects are in that stage.

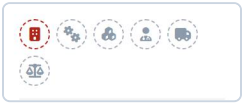
2



Card

The title and the original need. Press it to open the stage and team screen.

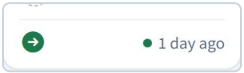
3



Team roles

Filled means partnered, an orange ring means in talks, a dotted circle is not decided yet. A red dotted circle is a role needed for the next stage.

4



What to do next

The lock and number show what is left before the next stage. Hospital voices are shown as dots, and a green arrow means you can move on. On the right is when it last moved.

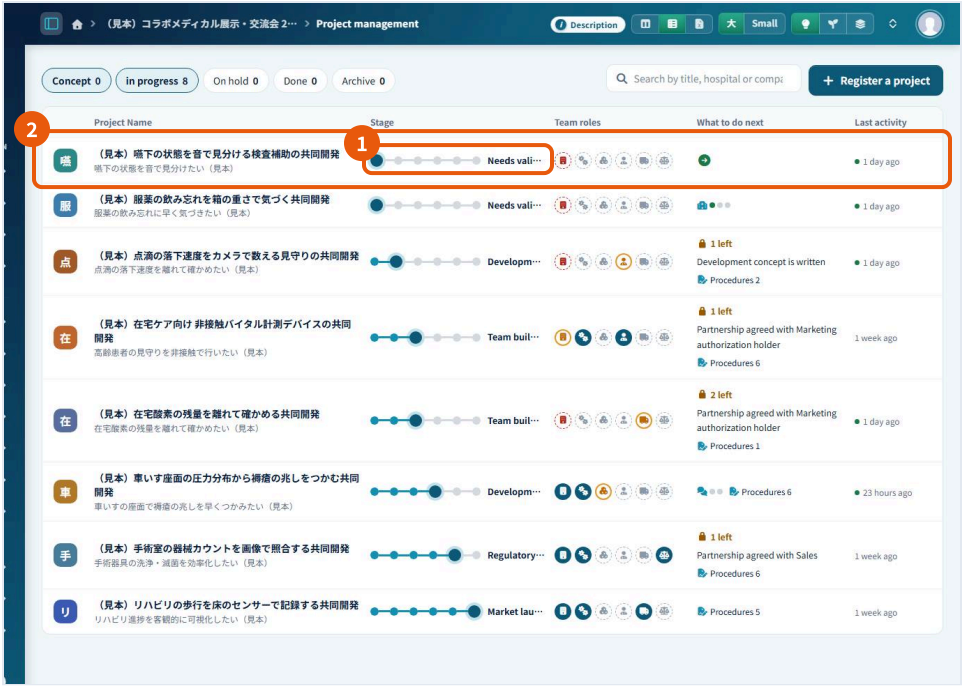
5



Status switches

Each press shows or hides that status. Idea and in progress are shown at first.

Project list (table)



1 Needs vali…

Stage meter
The dark circle is the current stage.

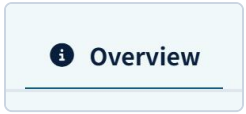
2 （見本）嚥下の状態を音で見分
嚥下の状態を音で見分けたい（見本）

Row
Team roles and next steps are the same as on the cards. Press a row to open the stage and team screen.

Project overview

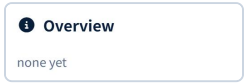


1



Overview
The tab next to Progress.

2



Description and background
The project description, medical device development and background are listed.

3



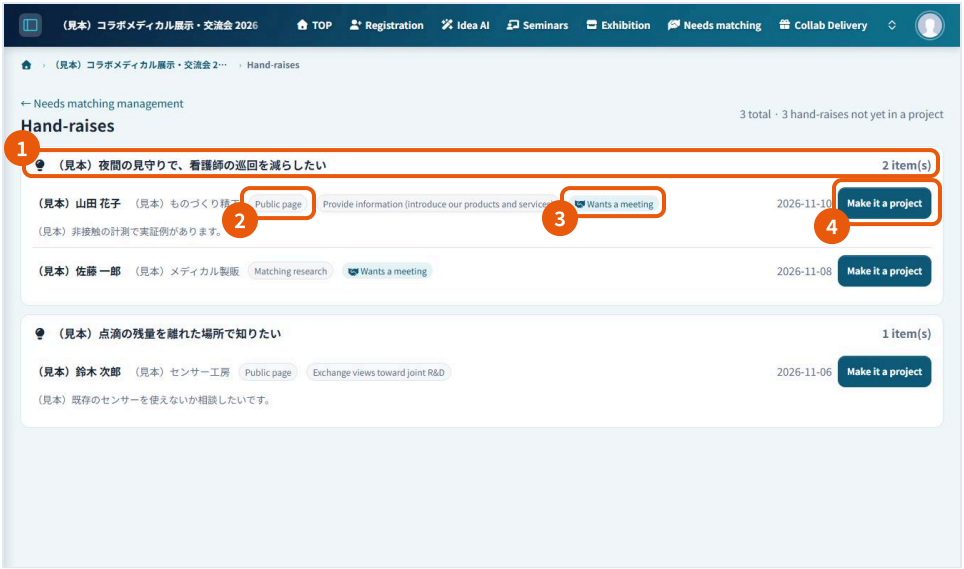
Edit
Press the pencil to open that item's window in the project details.

3

From Needs to Commercialization

7 screens

Meeting requests / comments: from the public page and the survey in one list



1 （見本）夜間の見守りで、看護

By need

Meeting requests / comments for the same need are grouped. The number on the right is the count.

2 Public page

Where it came from

Shows whether it came from the public page or the matching survey, and the purpose given.

3 Wants a meeting

Wants a meeting

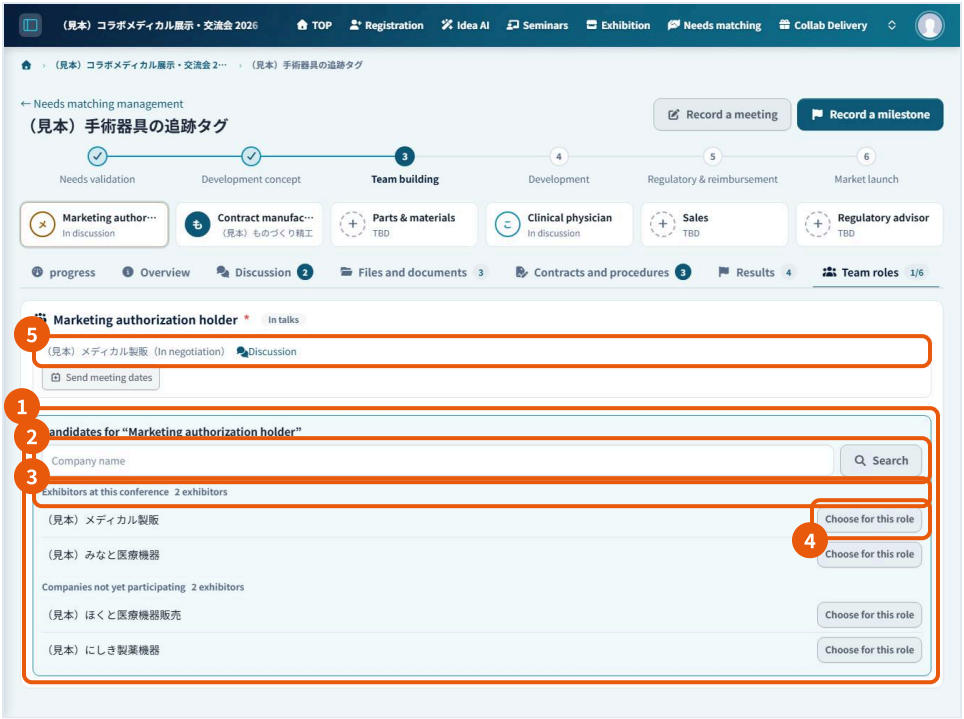
Marks meeting requests / comments that asked for a meeting.

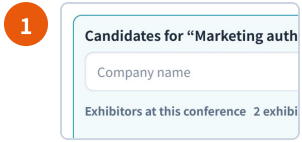
4 Make it a project

Make a project

Creates a project that starts at needs validation. The same meeting request / comment cannot go into two projects.

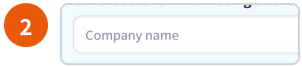
Find candidates, choose them for a role and reach out





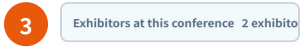
Candidate search

The heading shows which role you are searching for.



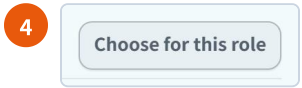
Search by company name

With no name entered, companies of a suitable type for the role are listed.



Three lists

Exhibitors, registered companies, then companies not yet taking part, five each. Open the rest with "Show n more companies".



Choose for this role

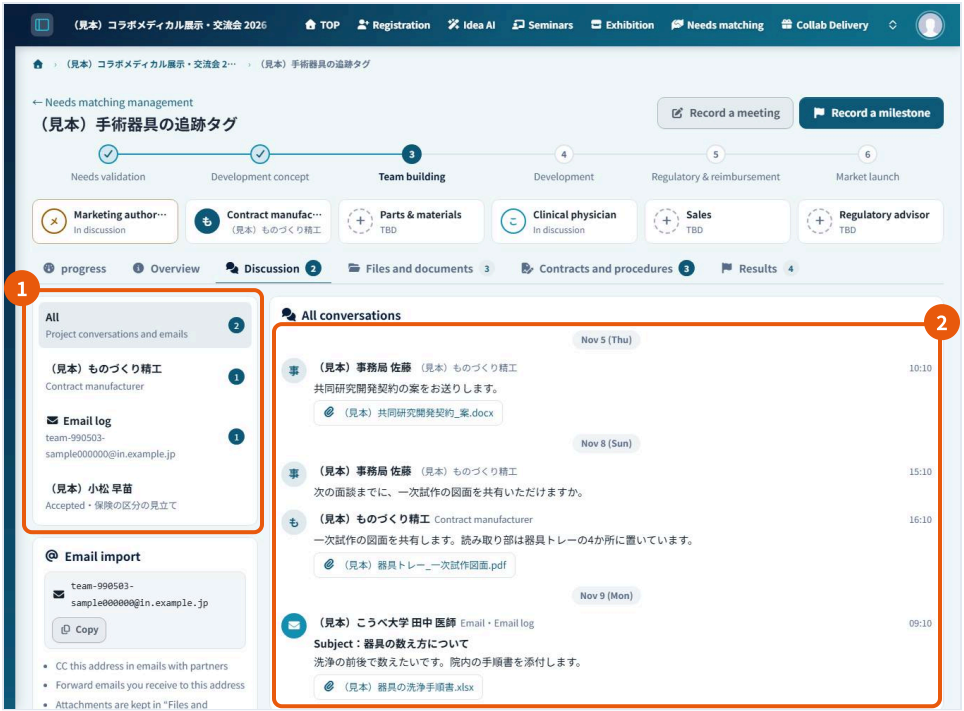
Makes the company a candidate for this role.



Reach out

"Reach out" next to a candidate starts a conversation. Writing in it sets the status to Sent, and a reply from them sets it to Replied.

Discussion: conversations with each partner in one timeline



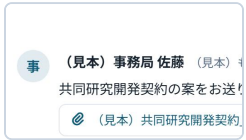
1



Conversations

"All" and each partner conversation. Numbers are unread messages.

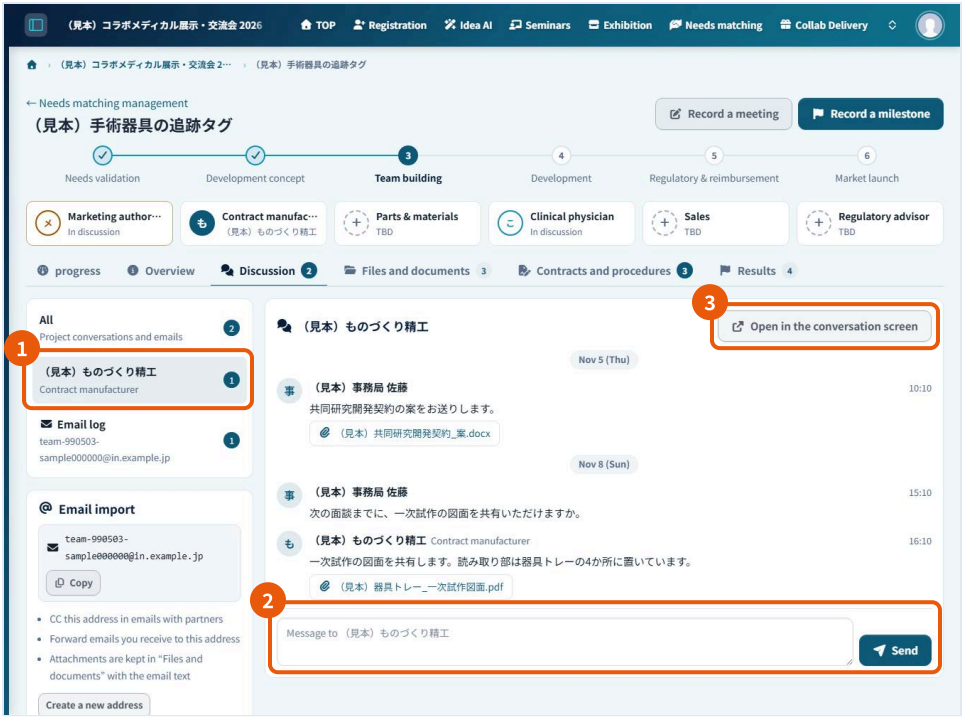
2



One timeline

Who wrote what, in which conversation and when, with attached files.

Discussion: choose a conversation and write right there



1 （見本）ものづくり精工 Contract manufacturer

Chosen conversation
Only this conversation is shown in the timeline.

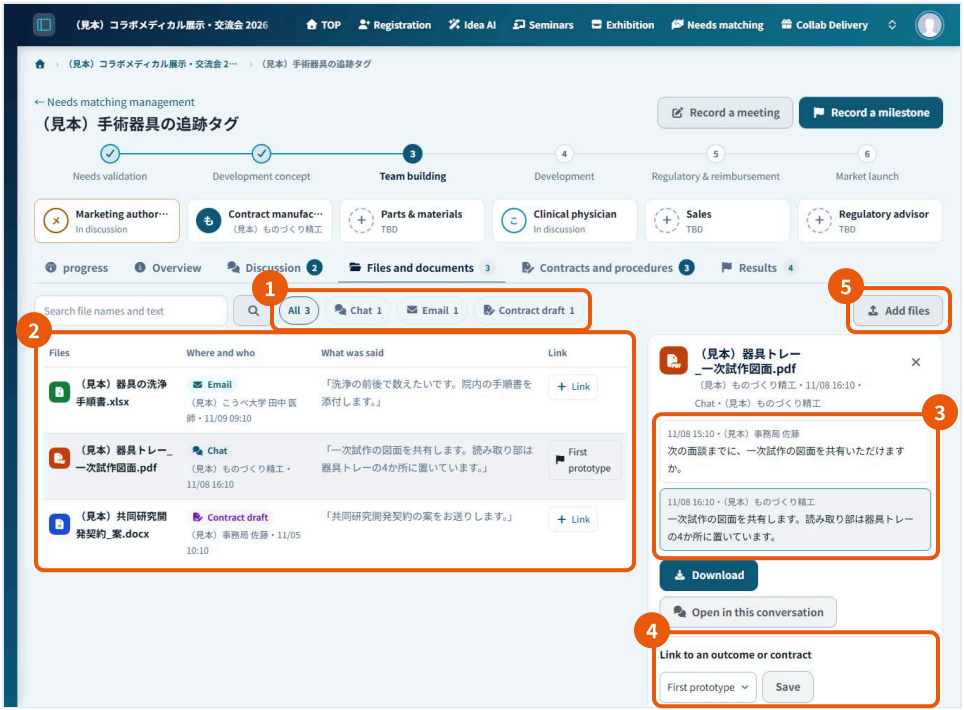
2 Message to （見本）ものづくり精工

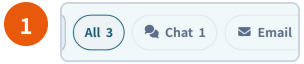
Write here
Write and send to add it to the end of the timeline. The page does not reload.

3 Open in the conversation sc

Open in the conversation screen
Open it to attach files or use other actions in the conversation screen.

Files and documents: where, who and in which discussion





1

Kinds

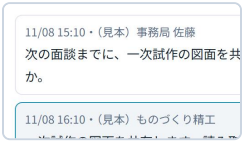
Filter by chat, contract draft or added by hand.



2

File list

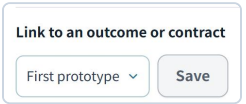
Where and who shared it, and the start of what was being said.



3

Surrounding messages

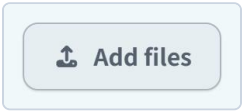
The messages before and after the one with the file.



4

Link to an outcome or contract

Choose a recorded outcome or contract and save. The link appears in the list.

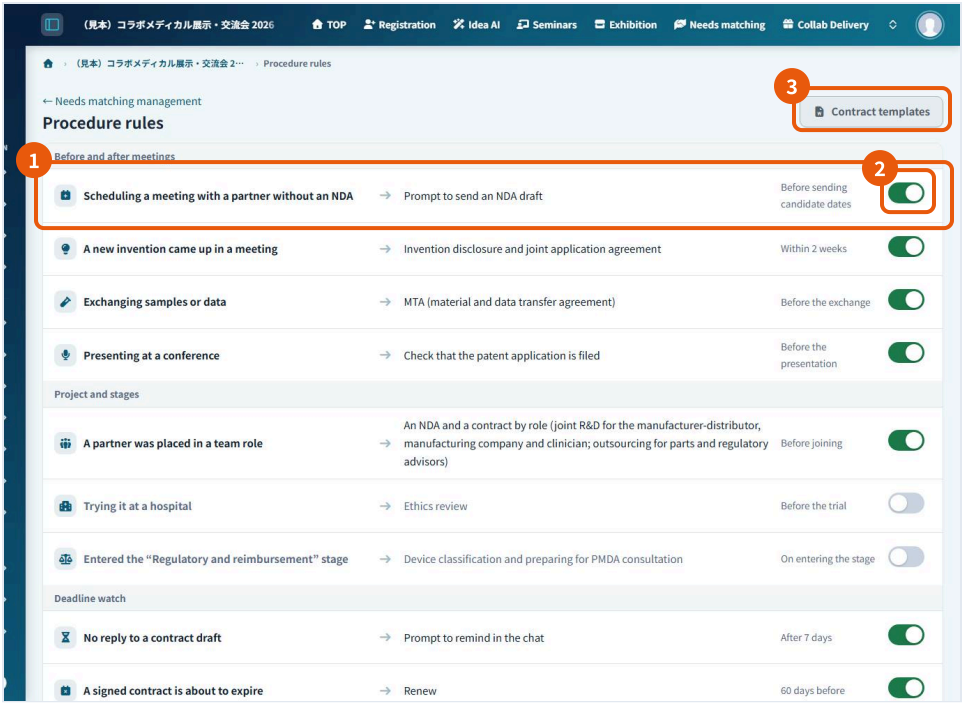


5

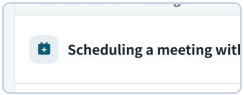
Add files

Add files that were not shared in a conversation to the project log, with a short note.

Procedure rules: triggers and procedures



1



One rule

Trigger on the left, the procedure added in the middle and the timing on the right.

2



Turn on or off

Press to turn it on or off for this conference only. Other conferences are not affected.

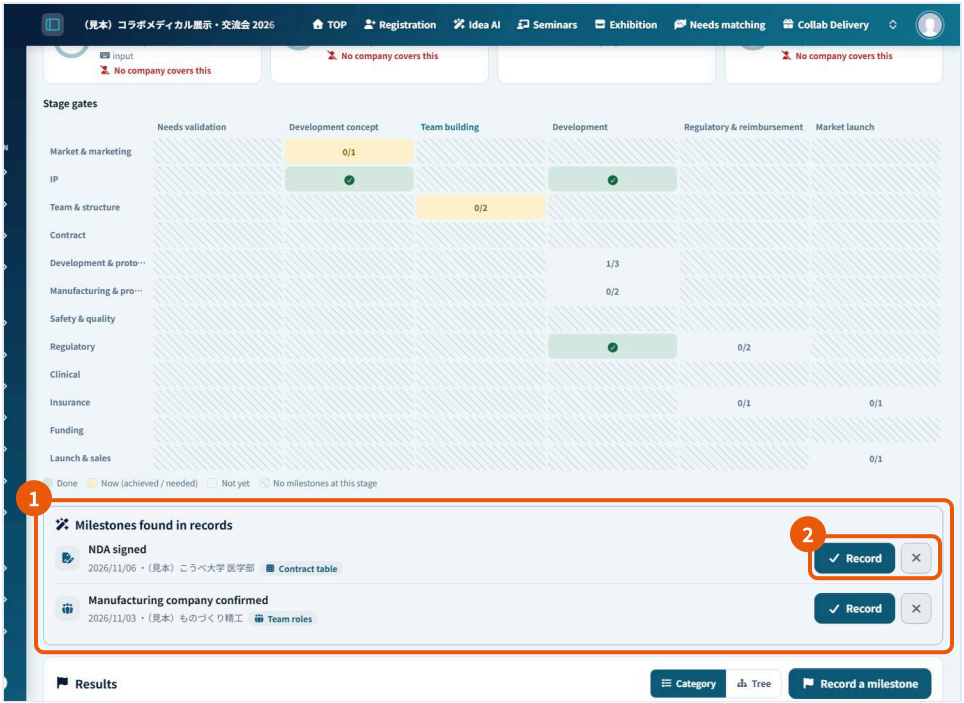
3



Contract templates

Register and activate the templates used to create drafts.

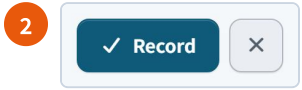
Record commercialization milestones





Milestones found in records

Found from signed contracts, confirmed roles or finished procedures. Date and partner are filled in.



Record or skip

"Record" adds it to the milestones. If it does not apply, press × to skip it; it will not appear again.

If you need help

- Use "i Description" at the top right of a screen to see how that screen works.
- Use "Contact" at the bottom of the screen to reach our staff.
- The latest version of this guide is at https://cpk.jp/manual/pdf