

User Manual

IU Committee

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1.0 Introduction

There are many committees across the Indiana University System. This project proposes to create a web-based committee management system that will allow committees to function in a more uniform manner, increase their productivity, and allow for greater transparency to the committee's work. This program will include features for scheduling meetings, managing committee documents and members, and allow the public to easily find committee meeting members, and minutes. Since this application will be web-based, there is no special software committee members will need to use the application. Also, since the users are already a part of the IU system, they will not need a different logon and will use the same method to login on other IU systems (such as the Oncourse system).

2.0 Overview

2.1 Requirements

IU-Committees is an application based on the internet environment. It requires a computer (including mouse and keyboard) which has an internet browser and an internet connect in order to use the application.

2.2 User manual

While efforts of make certain that everything in this manual is correct, some of the images in this manual may very slightly from the actual web pages. The web pages have been continously updated while this manual was being written, so it is difficult to make sure every update is reflected correctly. Mainly the color of buttons has changed, but other slight formatting changes may also not be reflected by this manual.

3.0 Using IU-Committee

3.1 General public committee view

Members of the general public that are not committee members and/or do not have a log in will be able to view certain parts of the system. They will be able to view all Universities, Campuses, Schools, and Units. The public will be able to view all publicly listed committees and publicly listed meetings of those committees. They will also be able to download committees' public documents.

The divisions (A division is a generic term for a university, campus, school, or unit.) can be navigated via a tree like structure. At each level the user will be presented with a link the the current divisions parent division, a list of sub-divisions, and a list of committee that the current division has. See [Figure 1](#)

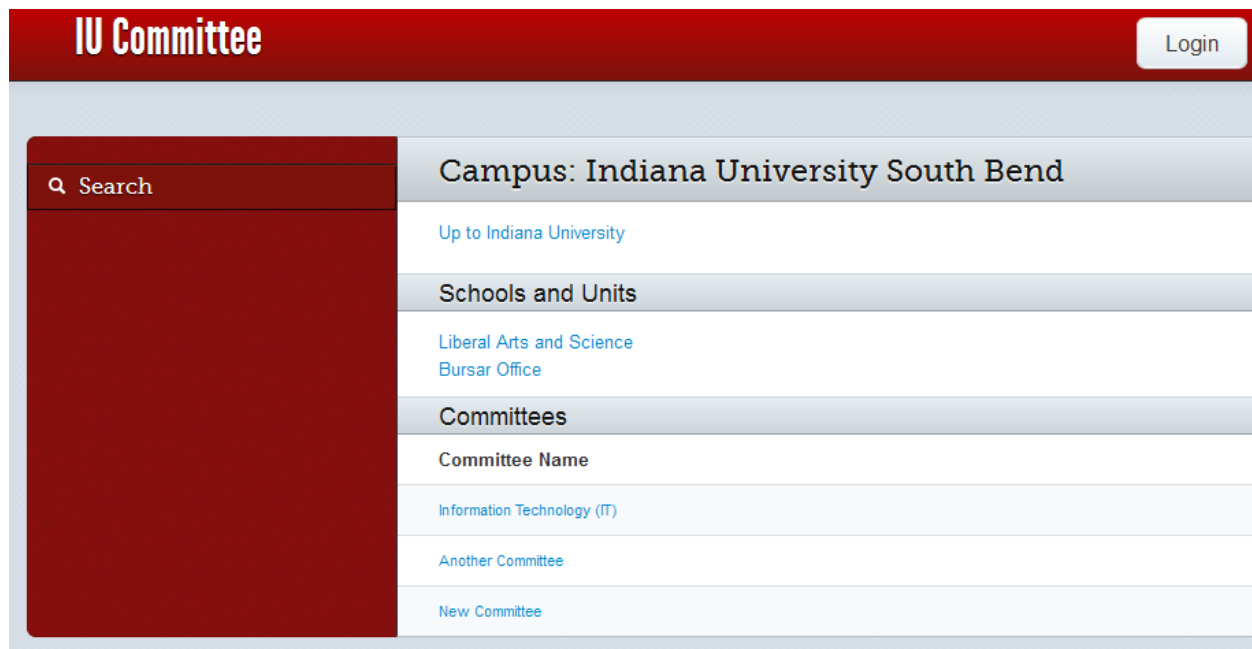


Figure 1 Public view of campus

3.2 Permissions

Access to certain functions of the system is limited to users in certain roles. Roles generally exist with respect to a committee or division. That is a user that is a committee admin of committee A is only a committee admin for that committee and not all committees. The exception to this is IT Admins which have power with respect to all divisions.

Buttons and other options are displayed according to the user's roles. The images in this manual usually depict a the screens a user who fills all roles, IT Admin, Committte Super Admin, Committee Admin, and Committee Convener would see.

3.2.1 IT Admin

IT Admins have the ability to designate who the Committee Super Administrators are for any division in the system. This is the only privledge of IT Admins

3.2.2 Committee Super Admins

Committee Super Admins privledges apply only to the Divisions that they are a CSA of. Committee Super Admins (CSA) have the ability to create, modify, delete, and archive committees. They also have the ability to add members to committees that belong to the CSA's divisions. They can also change the member's term.

3.2.3 Committee Admins

Users who are the Chair, Co-chair, or convener of a committee fill this role. This role applies to committees, meetings, committee documents, and meeting discussion items. The Committee Admin (CA) has the ability to add, delete, and edit meetings and committee documents.

3.2.4 Committee Convener

The convener has all the abilities of the Committee Admin but it is a temporary role. The convener has the ability to designate members of the committees to become chairs. Once the convener does this he/she is no longer a convener.

3.2.5 Committee Member

The committee member has the ability to view committees, meeting, and all committee documents as well as vote on discussion items.

3.2.6 Non-voting Member

The non-voting member has the ability to view committees, meetings, committee documents, and discussion items, but cannot vote on discussion items.

3.3 Login

To login, the user must have an account on CAS system of Indiana University

IU Committee	
Login	
<input type="text" value="Search"/>	Welcome
	To access committee information, please choose a university from the list below. If you are a member of the Indiana University Community please login first.
	University
	Indiana University
	Committees
	<input type="text" value="Committee Name"/>

Figure 2 Welcome page (not logged in)

To login into IU-Committee, please follow steps below:

- On the homepage of UI-Committee, click login
- User will be redirected to CAS login
- User then types username and password
- The user will be redirected to the IU-Committee Welcome page. [Figure 3](#)

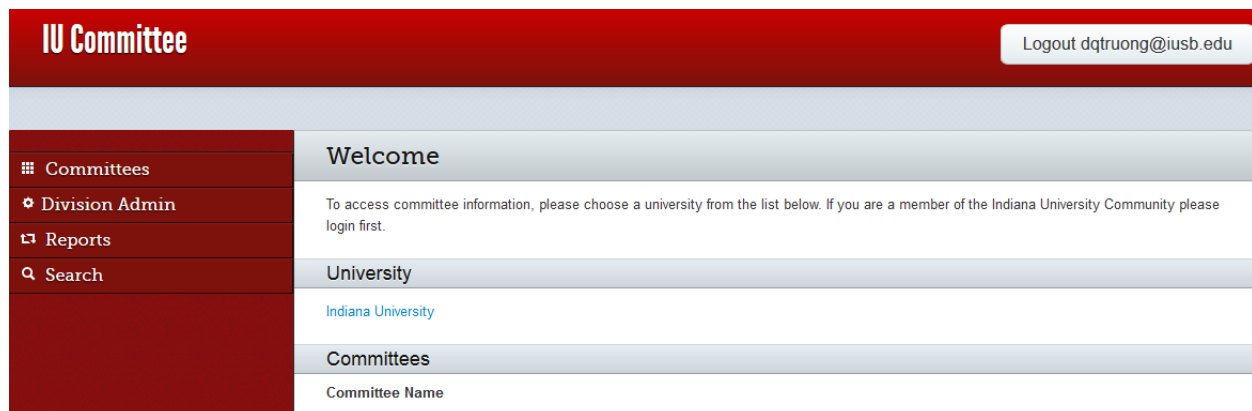


Figure 3 Welcome Page (logged in)

3.4 Manage Committees

To manage Committees, user must have **Committee Super Admin** privilege.

3.4.1 View a committee

Choose Campus/Schools/Unit to show the list of committees then click on a committee in the Committees list. The details view of that committee will be shown as in the figure below.



Figure 4 Committee view

Note: Any member is able to view any committee which they work for or public view on other committees.

3.4.2 Create a new committee

From [Figure 3](#) click Create New Committee button

Create New Committee

Name

Effective Date

Type

Listed publicly?

Minimum number of members

Maximum number of members

Member term length

Creation Comments

Committee Charges

Committee Constitution

Figure 5 Create New Committee

To Create New Committee, please fill all information below:

- Name: is the committee name
- Effective Date: is the date that the committee is going to effect
- Type: will be Adhoc
- Listed publicly: Weather non members can see the committee or not
- Minimum number of members: The minimum amount of member for committee to be valid
- Maximum number of members: The maximum amount of member that committee could have
- Member term length: The time that members work for the committee.
- Creation Comments: Why create the committee
- Committee Charges: The charge of committee
- Committee Constitution: The constitution of committee
- After filling needed information, click Create button otherwise click Cancel

3.4.3 Edit a committee

Edit Committee: Information Technology (IT)

Name
Information Technology (IT)

Effective Date
10/5/2012 12:00:00 AM

Type
Adhoc

Listed publicly?
Yes

Minimum number of members
17

Maximum number of members
17

Member term length
30

Creation Comments

Save Cancel

Figure 6 Edit Committee

To Edit a Committee, first click Edit Committee on [Figure 4](#), then please follow steps below:

- Name: is the committee name
- Effective Date: is the date that the committee is going to effect
- Type: will be Adhoc
- Listed publicly: Public viewer can view the committee or not
- Minimum number of members: The minimum amount of member for committee to be valid
- Maximum number of members: The maximum amount of member that committee could have
- Member term length: The time that member works for the committee.
- Creation Comments: Why create the committee
- After filling needed information, hit Save button otherwise hit Cancel

3.4.4 Archive a committee

Archive Confirmation: Information Technology (IT)

If you are sure you want to archive this committee enter archive comments below.

Effective Date: 10/5/2012 12:00:00 AM
Minimum number of members: 17
Maximum number of members: 17
Member term length: 30
Type: Adhoc
Listed publicly?: Y
CreatedBy: Bob D
CreatedDate: 11/16/2012 11:35:08 AM
Creation Comments:

Archive comments:

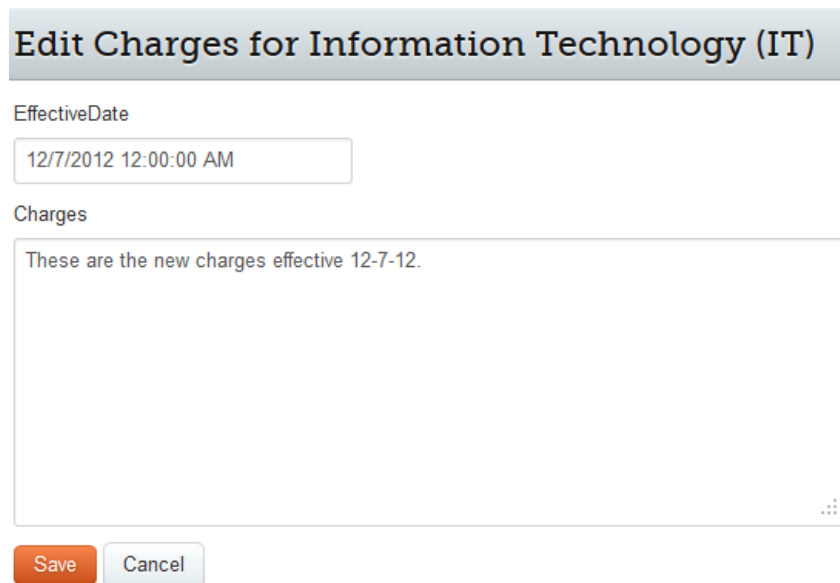
Archive

Cancel

Figure 7 Archive Committee

To Archive Committee, first click Archive Committee on [Figure 4](#)
Then there is a review information of the committee before archiving and fill the Archive comments box, then hit Archive button to archive the committee otherwise hit Cancel.
Note: If the committee is archived, it will not be show on the Committees list.

3.4.5 Edit Committee's Charge



Edit Charges for Information Technology (IT)

EffectiveDate

12/7/2012 12:00:00 AM

Charges

These are the new charges effective 12-7-12.

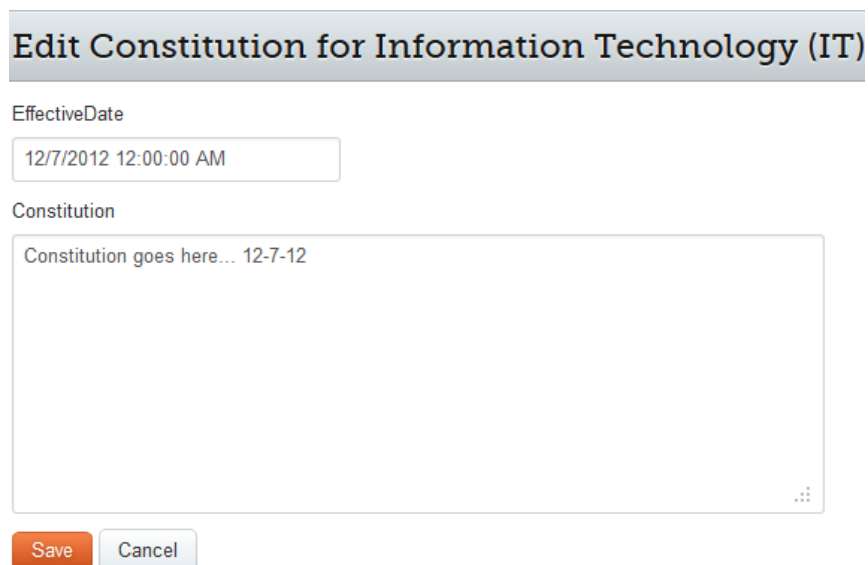
Save Cancel

Figure 8 Edit committee charges

First click Update Charges on [Figure 4](#)

Choose an **Effective Date** for the charges, then fill in the charges for the committee, then hit the Save button to save otherwise hit Cancel. Note the effective date must be in the past and not be the same as another effective date.

3.4.6 Edit Committee's Constitution



Edit Constitution for Information Technology (IT)

EffectiveDate

12/7/2012 12:00:00 AM

Constitution

Constitution goes here... 12-7-12

Save Cancel

Figure 9 Edit committee constitution

First click Update Constitution on [Figure 4](#)

Choose an Effective Date then filling the Charges for the committee, then hit Save button to save otherwise hit Cancel. Note the effective date must be in the past and not be the same as another effective date.

3.5 Manage Member

To manage members in a committee, the user must have **Committee Super Admin** privileges for the committee's parent division. The manage members controls are located in the details view of the committee.

Members					
Add Member Set Chair					
Name	Role	Start	End	Representing	
Bob D	Chair	12/2/2012	12/25/2012	Indiana University South Bend	Edit
Dung Truong	Chair	12/7/2012	12/8/2013		Edit
Eric Ground	Chair	10/7/2012	7/27/2013		Edit
Joel Haubold	Convener	1/1/2012	12/31/2012		Edit

Figure 10 Membership list

3.5.1 Add Member

Add Member for Information Technology (IT)

User Email

Role

Chair

Can Vote?

☐ No
☒ Yes

Start Date

End Date

Create

Back to Committee

Figure 11 Add committee member

To create a new member first click Add Member in [Figure 10](#) then:

- Choose a member email in the drop down list
- Choose role in the drop down list
- Choose voting ability
- Choose Start Date and End Date
- Note: The End Date should be after the Start Date.
- Hit Create to add new member otherwise click Back to Committee.

3.5.2 Edit Member

The screenshot shows a web form titled "Edit bob@iu.edu for Information Technology (IT)". It contains several input fields: a "Role" dropdown menu currently set to "Chair", a "Can Vote?" section with radio buttons for "No" (selected) and "Yes", a "Start Date" field with the value "12/2/2012 12:00:00 AM", and an "End Date" field with the value "12/25/2012 12:00:00 AM". At the bottom are two buttons: "Save" (orange) and "Cancel" (light blue).

Figure 12 Edit committee member

To Edit a member, first hit the Edit button for specific member as in [Figure 10](#). Only the Committee Super Admin can change role, voting ability, or change the term for the role. Hit Save to apply the change otherwise hit Cancel.

Note: The Committee Super Admin can remove a member from the committee by setting the End Date before the Start Date.

3.5.3 Set Chair Member Role

After the committee's chair(s) have been determined, the committee convener can set the chair roles of a committee. The user must be the committee Convener or the Set Chair button would not show up on [Figure 10](#).

The screenshot shows a web form titled "Set chairs for Information Technology (IT)". Below the title, it says "Please select the chairs for this meeting. Note this can only be done once." There is a list of email addresses, each preceded by an unchecked checkbox: "bob@iu.edu", "dqtruong@iusb.edu", "esground@iusb.edu", "hauboldj@iusb.edu", "jarshort@iusb.edu", and "jashdown@iusb.edu". At the bottom are two buttons: "Update" (blue) and "Cancel" (light blue).

Figure 13 Set chairs (convener)

To set the chair role(s), first click Set Chair button on [Figure 10](#), then check the boxes next to the new chairs, then hit Update to complete the setting of the chairs, otherwise hit Cancel. Note: once this operation is complete, the convener will revert to a normal member. (Unless he/she was selected to be a chair of the meeting.)

3.6 Manage Committee Documents

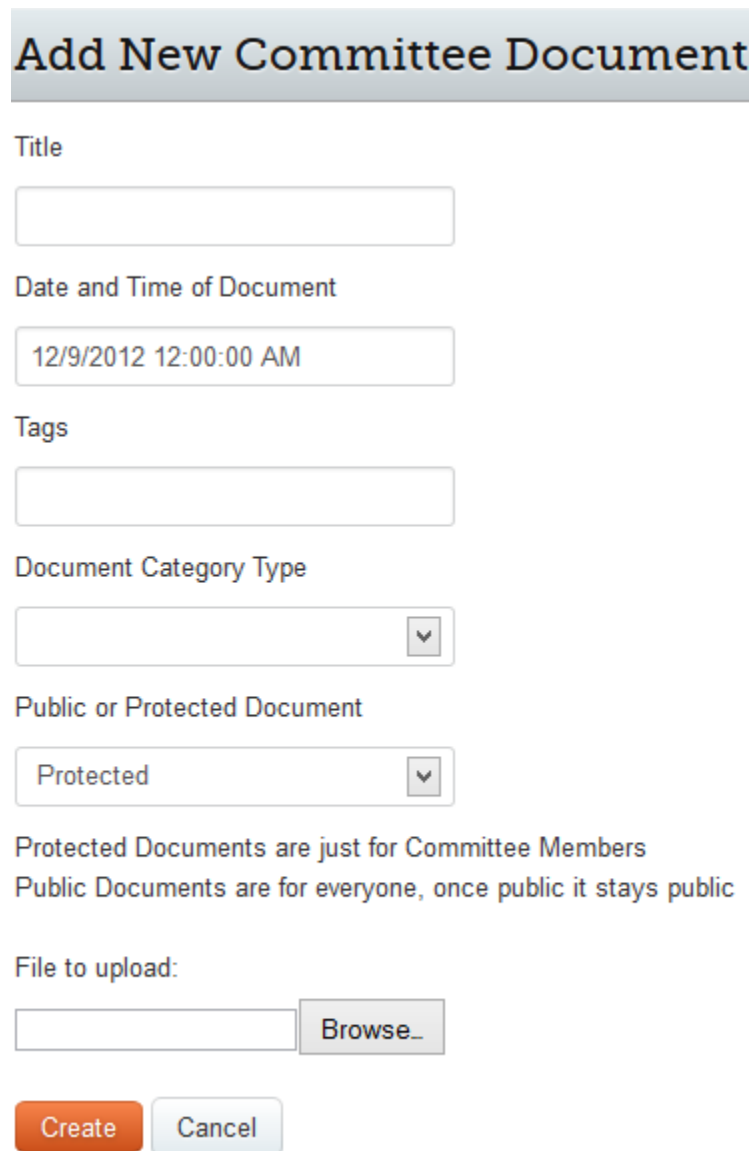
Committee Documents			
Add Document			
Show	10	▼	entries
Search:			
Title (click for details)	Category	Date	Filename (click to download)
Convener Add	General	Saturday, December 8, 2012	Testing file upload.docx
Document1	General	Monday, December 10, 2012	Testing file upload.pdf
Hello	Annual Report	Wednesday, December 12, 2012	Fix.txt
Ta-Da!	Annual Report	Monday, December 10, 2012	document.txt
Showing 1 to 4 of 4 entries		Previous Next	

Figure 14 Committee documents list

The Committee documents are listed in the committee details view. To manage Committee Documents, the user must have Committee Admin privileges. The Committee Admin is able to perform following task:

- Add new document
- Edit an existing document
- Delete an existing document
- Download document

3.6.1 Add Committee Document



The screenshot shows a web form titled "Add New Committee Document". The form contains the following fields and controls:

- Title:** A text input field.
- Date and Time of Document:** A text input field containing the value "12/9/2012 12:00:00 AM".
- Tags:** A text input field.
- Document Category Type:** A dropdown menu with a downward arrow icon.
- Public or Protected Document:** A dropdown menu with "Protected" selected and a downward arrow icon.
- Protected Documents are just for Committee Members**
Public Documents are for everyone, once public it stays public
- File to upload:** A text input field next to a "Browse..." button.
- Create** (orange button) and **Cancel** (light blue button) buttons at the bottom.

Figure 15 Add committee document

To Add new Committee Documents, first click Add Document on [Figure 14](#), then follow the steps below:

- Give the document a title
- Choose a date and time
- Choose a tags for document
- Choose category of document: Annual Report, Meeting Minutes, or Catchal Category
- Specify document public show or Protected (not shown in public)
- Upload file

- Hit create to finish adding document otherwise hit cancel

3.6.2 View a committee document details

Hello Document Details

Download

Information Technology (IT)

Document effective date:
December 12, 2012

Tags:
Hui

Document Category:
Annual Report

Added by:
Dung Truong

UploadedDate:
12/8/2012 5:52:18 PM

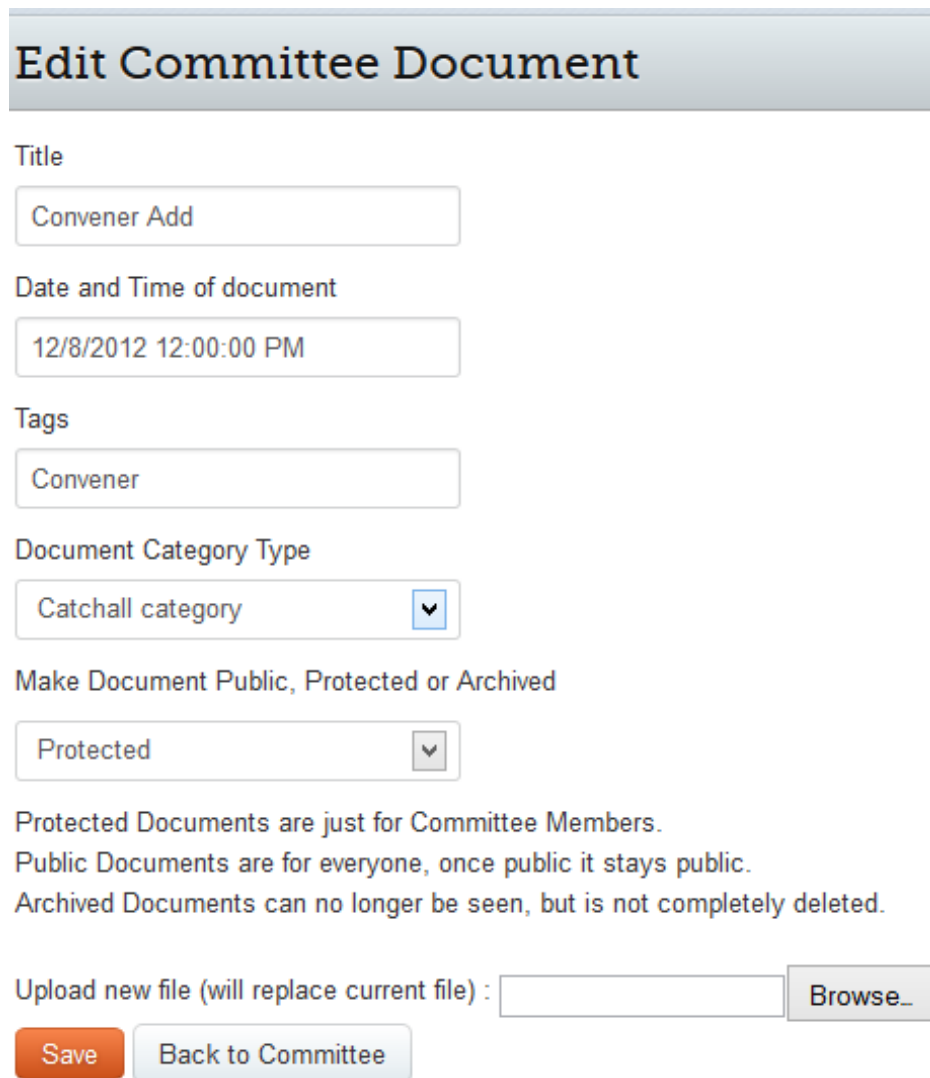
Back to Committee

EditDelete

Figure 16 Committee document details

To view a committee document's details click the document title in [Figure 14](#).

3.6.3 Edit Committee Document



Edit Committee Document

Title

Convener Add

Date and Time of document

12/8/2012 12:00:00 PM

Tags

Convener

Document Category Type

Catchall category ▼

Make Document Public, Protected or Archived

Protected ▼

Protected Documents are just for Committee Members.
Public Documents are for everyone, once public it stays public.
Archived Documents can no longer be seen, but is not completely deleted.

Upload new file (will replace current file) : Browse_

Save Back to Committee

Figure 17 Edit committee document

To Edit an existing Committee Document first click Edit in [Figure 16](#), modify one of all fields:

- Modify Title
- Modify Date and Time
- Modify Tags
- Document Type
- Choose a new document action, please read before choosing
- Upload a new file
- Hit Save to apply change otherwise hit Back to Committee to cancel

Note: If new file is uploaded, it is going to change to new file, otherwise, it will keep old file.

3.6.4 Delete a Committee Document

Delete

Are you sure you want to delete this document?

Committee Name
Information Technology (IT)

Title
Hello

Date and Time of document
12/12/2012 12:00:00 AM

Tags
Hui

Filename
Fix.txt

Description
Annual Report

UploadedDate
12/8/2012 5:52:18 PM

Figure 18 Delete committee document

To Delete an existing Committee Document first click Delete in [Figure 16](#), then follow the steps below.

- Review information before deleting
- Hit Delete to delete otherwise hit Back to Committee to Cancel

3.6.5 Download Committee Document

There are two ways in order to download committee document

- Download file by clicking Download button on Document Details [Figure 16](#).
- Download file by clicking on the download link of the file on [Figure 14](#).

3.7 Manage Meeting

Meetings

Add Meeting

Show entries

Search:

Date and Time of meeting	Location
11/22/2012 12:00:00 AM	Nowhere
11/26/2012 12:00:00 AM	A
12/12/2012 12:30:00 AM	Library
12/24/2012 7:00:00 PM	NS102
12/25/2012 12:00:00 AM	North or East Pole
12/3/2012 12:00:00 AM	Test Auth

Showing 1 to 6 of 6 entries

[Previous](#)[Next](#)

Figure 19 Committee meeting list

To manage Meeting, user must have Committee Admin privilege. Committee Admin can perform task below:

- Add new meeting
- Edit an existing meeting
- Delete a meeting

Members can view the details of a meeting by clicking on the Date and Time of meeting link.

3.7.1 View a meeting

Details for Information Technology (IT) meeting on 11/26/2012

Date and Time of meeting: 11/26/2012 12:00:00 AM

Location: A

Created by: hauboldj@iusb.edu

Created Date: 11/22/2012 9:23:34 PM

Listed publicly?: Y

Final Agenda:

Back to Committee

Delete Meeting

Edit Meeting

Discussion Items

Title	Decision	Description
<div>Add discussion item</div>		

Figure 20 Meeting details

To view a meeting's details click on the Date and Time link in [Figure 19](#).

3.7.2 Add Meeting

Create meeting for Information Technology (IT)

Date and Time of meeting

Location

Listed publicly?

Final Agenda

Figure 21 Create meeting

To Add Meeting, first click add meeting in [Figure 19](#) and then follow the steps below:

- Choose a date and time of the meeting
- Type in the location of the meeting
- Specify the meeting is publicly showed or not
- Type in the final agenda for the meeting
- Hit Create Meeting button to create otherwise hit Back to Committee

3.7.3 Edit Meeting

Edit Meeting

Date and Time of meeting
11/22/2012 12:00:00 AM

Location

Listed publicly?

[Save Meeting](#)

Final Agenda
Some really
Long
String
Of
Items
Goes
In
Here
To see how it looks

[Back to Meeting](#)

Figure 22 Edit meeting

To Edit a Meeting, first click Edit meeting on [Figure 20](#), then change one or all fields on the edit form.

- Type in new location
- Modify public show
- Modify Final Agenda
- Hit Save Meeting button to save change otherwise hit Back to Meeting

3.7.4 Delete Meeting

Delete Confirmation

Are you sure you want to delete this meeting?

Date and Time of meeting: 12/24/2012 7:00:00 PM
Location: NS102
Listed publicly?: Y
Final Agenda:

No agenda, just underground betting. (That's why it's in the basement.)

Created by: hauboldj@iusb.edu
Created Date: 12/7/2012 3:20:52 PM

Delete

Back to List

Figure 23 Delete meeting

Only Committee Admins can delete a meeting. To Delete a Meeting, first click Delete meeting in [Figure 20](#), then follow the steps below:

- Review information of the meeting
- Hit Delete button if wish to delete the meeting
- Hit Back to List to return to Meeting Details

Details for Information Technology (IT) meeting on 11/22/2012

Date and Time of meeting: 11/22/2012 12:00:00 AM

Location: Nowhere

Listed publicly?: N

Final Agenda:

Some really

Long

String

Of

Items

Goes

Created by: hauboldj@iusb.edu

Created Date: 11/22/2012 7:56:09 PM

[Back to Committee](#)
[Delete Meeting](#)
[Edit Meeting](#)

Discussion Items			
Title	Decision	Description	
Discussion with a file	N/A	A discussion with a file	Archive
Second Item		It will be second	Archive

[Add discussion item](#)

Figure 24 Discussion Items

To manage discussion items, user must have Committee Admin privilege. Committee Admin can perform task below:

- Create a new discussion item
- Edit an existing discussion item
- Archive a discussion item

Members can view the details of a discussion item by clicking on the Title of discussion item link.

3.8.1 View Discussion Item

Details for Discussion with a file discussion item

Edit Discussion Item

Archive

Back to Meeting

Download: Testing file upload.pdf

Location : Nowhere

Meeting Date & Time : 11/22/2012 12:00:00 AM

Description : A discussion with a file

Decision : N/A

CreatedDate 12/6/2012 6:36:17 PM

Due Date : 1/1/2013 12:00:00 AM

Comments

Show 10 entries

Search:

Date & Time	Comment	User
12/7/2012 3:31:49 PM	It works	bob@lu.edu
12/7/2012 10:40:16 PM	This is a test	bob@lu.edu
12/7/2012 10:40:39 PM	I added this not bob	bob@lu.edu
12/8/2012 12:37:48 PM	This box should probably be bigger, so I can type out a longer more thought out comment.	bob@lu.edu
12/8/2012 6:50:53 PM	Testy McTester.	jashorn@usb.edu
12/9/2012 7:39:49 PM	I'm not Bob now!	jashdown@usb.edu

Showing 1 to 6 of 6 entries

PreviousNext

Enter a comment...

Add comment

Votes

Show 10 entries

Search:

User	Vote	Date & Time
No data available in table		

Showing 0 to 0 of 0 entries

PreviousNext

Add vote

Mark Discussion Item as Read

Figure 25 View Discussion Item Details

To view a Discussion Item's details click on the Date and Time link in [Figure 24](#).

26

3.8.2 Add Discussion Item

Create discussion item for the meeting on 11/22/2012 12:00:00 AM

Title

Description

Due Date

1/1/0001 12:00:00 AM

Votable

No Yes

Anonymous Voting

No Yes

Readable

No Yes

Vote Types

No

Undecided

Yes

File to upload:

Browse...

File Tags

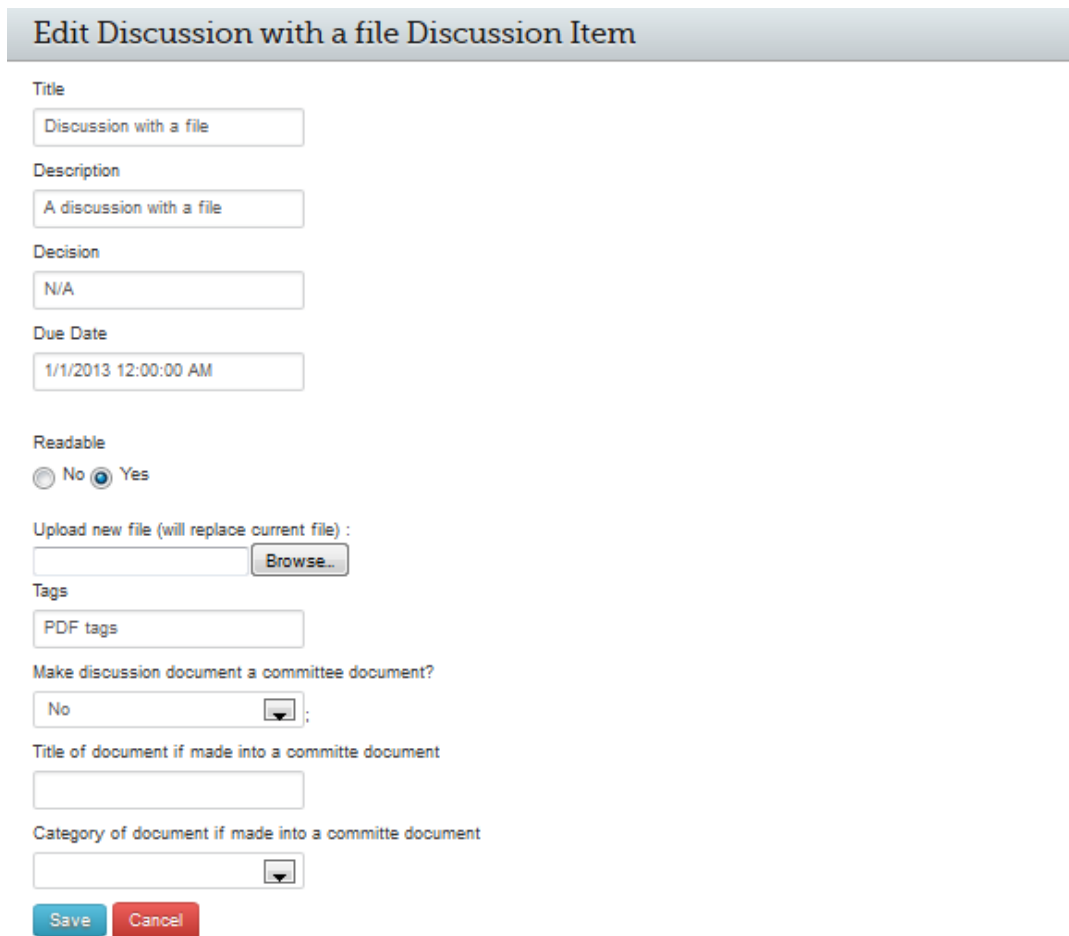
Create Discussion Item Cancel

Figure 26 Add Discussion Item

To add a discussion item, first click Add discussion item in [Figure 24](#) and then follow the steps below:

- Type the title of the discussion item
- Type the description of the discussion item
- Choose the due date of the discussion item
- Select whether this discussion item is votable
- Select whether this discussion item has anonymous voting
- Select whether this discussion item is readable
- If the discussion item is votable, select the vote types
- If there is a document to upload for his discussion item, select the file to be uploaded
- Type the file search tags
- Hit Create Discussion Item button to create otherwise hit Cancel
 - NOTE: Votable, Anonymous Voting and Vote Types cannot be changed once a discussion item is created

3.8.3 Edit Discussion Item



The screenshot shows a web form titled "Edit Discussion with a file Discussion Item". The form contains several input fields and controls:

- Title:** A text input field containing "Discussion with a file".
- Description:** A text input field containing "A discussion with a file".
- Decision:** A text input field containing "N/A".
- Due Date:** A date and time input field containing "1/1/2013 12:00:00 AM".
- Readable:** Two radio buttons labeled "No" and "Yes". The "Yes" button is selected.
- Upload new file (will replace current file):** A text input field followed by a "Browse..." button.
- Tags:** A text input field containing "PDF tags".
- Make discussion document a committee document?:** A dropdown menu with "No" selected.
- Title of document if made into a committee document:** An empty text input field.
- Category of document if made into a committee document:** A dropdown menu.
- Buttons:** "Save" (blue) and "Cancel" (red) buttons at the bottom.

Figure 27 Edit Discussion Item

To edit a discussion item, first click Edit Discussion Item in [Figure 24](#) and then follow the steps below:

- Type the title of the discussion item
- Type the description of the discussion item
- Type the decision of the discussion item
- Choose the due date of the discussion item
- Select whether this discussion item is readable
- If there is a document to upload for his discussion item, select the file to be uploaded
- Type the file search tags
- Choose if the document should be made a committee document
- If the document is a committee document, type the title
- If the document is a committee document, Choose the category
- Hit the save button to save otherwise hit Cancel

3.8.4 Archive Discussion Item

To archive a discussion item, click Archive in [Figure 25](#).

3.8.5 Add Comment to Discussion Item

To add a comment to a discussion item, type the comment in the text area shown in [Figure 25](#) and press the Add Comment button shown in [Figure 25](#). If an invalid comment is typed, the user will be notified and must type a valid comment.

All comments for the discussion item are shown in the comments section as shown in [Figure 25](#).

User must be a member of the committee the discussion item is for to submit comments.

3.8.6 Add Vote to Discussion Item

To add a vote to a discussion item that is votable, select the vote from the drop down list and press the Add Vote button shown in [Figure 25](#). When the vote is added, a message will appear notifying the user that the discussion item has been voted on.

When the discussion item is not votable, the list of votes and the Add Vote button will not appear.

When voting of the discussion item is not anonymous, all votes will appear in the Votes section as shown in figure [Figure 25](#).

When voting of the discussion item is anonymous, individual votes will not be shown but only a tally of each type of vote. There will also be a message in the Votes section notifying the user that voting is anonymous for the discussion item.

User must have voting privileges to vote on a discussion item.

3.8.7 Mark Discussion Item as Read

To mark a discussion read, when the discussion item is readable, press the Mark Discussion Item as Read button as shown in [Figure 25](#). When the discussion item is marked as read, a message will appear notifying the user that the discussion item has been read.

If a discussion item is not readable, the Mark Discussion Item as Read button will not appear.

3.8.8 Download Discussion Item Document

If a document exists for a discussion item, a button will appear to the right of the Back to Meeting button with the word “Download :” followed by the document title. This is shown in [Figure 25](#).

To download the discussion item document, simply press the button.

If a download button does not appear, there is no document for that discussion item.

3.9 Search

Search

Please enter search string

Document tags

☐ All Committees ☒ My Committees

Search

Results

Show entries Search:

Title	Tags	Filename	Link To parent
No data available in table			

Showing 0 to 0 of 0 entries [Previous](#)[Next](#)

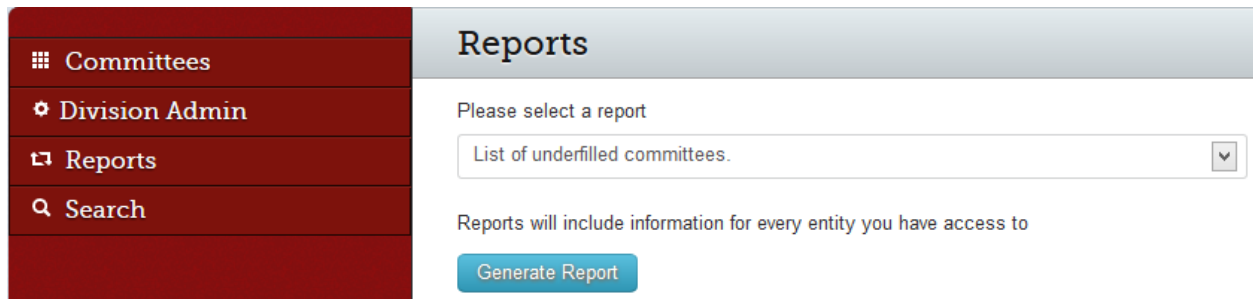
Figure 28 Search

The IU-Committee provides searching on Document tags to retrieve Document from the committee in which user works for, or from all existing committees.

To Search for a document

- Type keywords in Document Tags box
- Choose option All Committees or My Committees (All committee return public documents from all committees, My committees return public, protected, and private documents from the users committees.)
- Hit Search to retrieve results.

3.10 Report



The screenshot displays a web application interface. On the left is a dark red sidebar with four menu items: 'Committees' (with a grid icon), 'Division Admin' (with a gear icon), 'Reports' (with a document icon), and 'Search' (with a magnifying glass icon). The 'Reports' menu item is highlighted. The main content area has a light gray header titled 'Reports'. Below the header, the text 'Please select a report' is followed by a dropdown menu showing 'List of underfilled committees.' with a downward arrow. Below this, a line of text states 'Reports will include information for every entity you have access to'. At the bottom of the main area is a blue button labeled 'Generate Report'.

Figure 29 Reports

User must have the privilege that can generate reports otherwise it would not allow user to use this feature. There are limited type of reports on this version.

To generate Reports, first click Report tab from the left column then choose a type of report as needed, and hit Generate Report to complete Report. Reports are not committee specific and will return data for all committees the user is associated with.