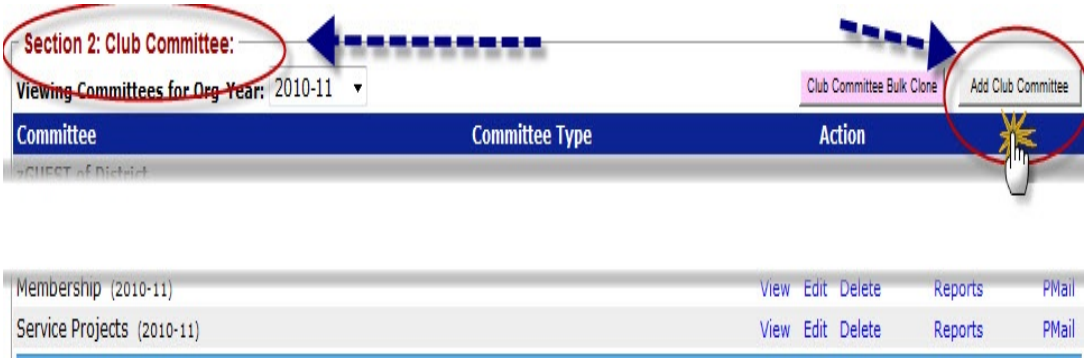
After clicking the gold "**Clone**" button, the Bulk Clone Summary page is returned detailing what committees were cloned.

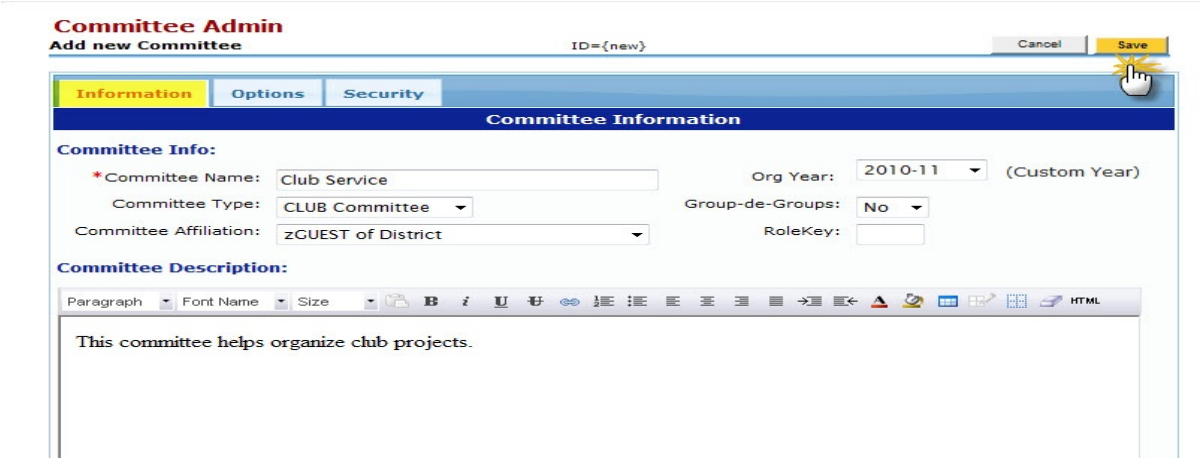
## Section 2 - Club Committee: Add Club Committee

By clicking on the **Add Club Committee** function link, the **Committee Admin** page is displayed so that new club committee information can be added.

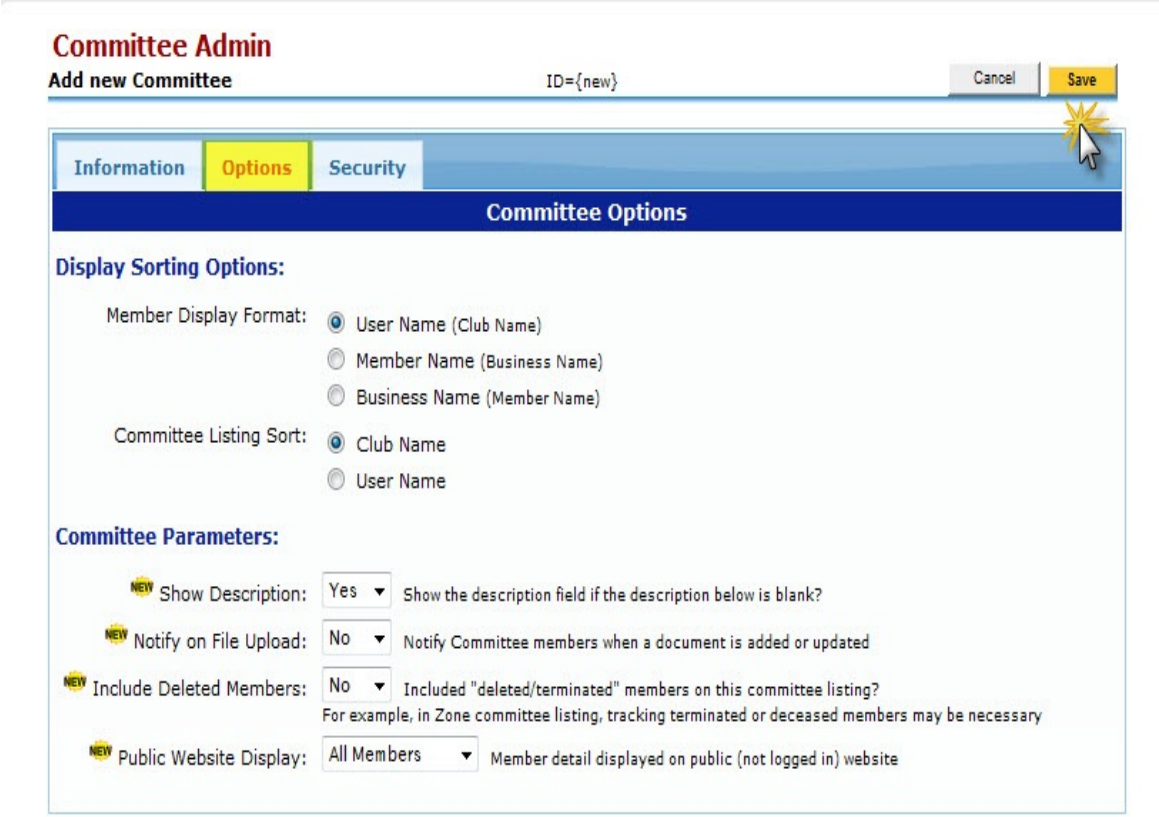



On the **Committee Admin** page, there are three tabs displayed when adding a new committee. (If you are editing a existing committee, you will see four tabs including the **Members and Positions** tab. This tab will be discussed in the **Section 2: Club Committee Edit Link** section. The three tabs discussed in this section are: **Information**, **Options**, and **Security** used to create a new committee.

- **Information** Tab -The **Information** tab displays the **Committee Info** and **Committee Description**. The **Committee Info** section includes drop-down menus to add/modify data. The **Committee Description** section is a free-form format to describe a particular committee.

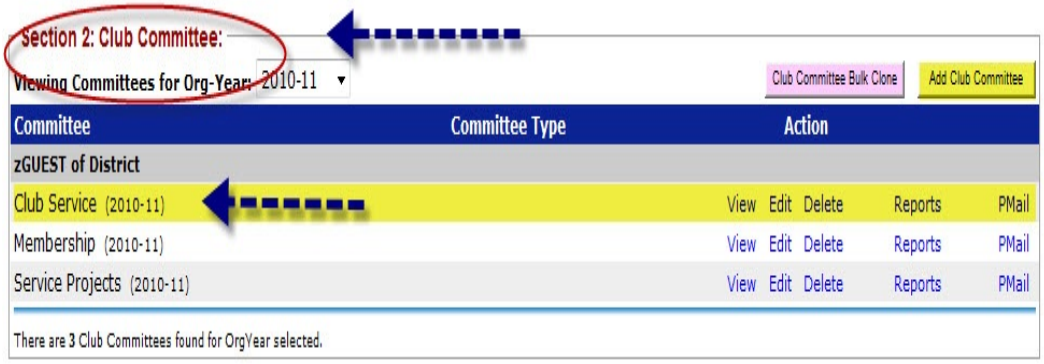


- **Options** Tab - The **Options** tab displays two options: **Display Sorting Options** and **Committee Parameters**. The sorting options are available to define how you want the club member names sorted (i.e., User, Member, or Business) and/or how the club should be listed (i.e., by Club Name or User Name). Parameters are listed with drop-down menus to define committee listing format and whether there should be notification sent on a file upload.



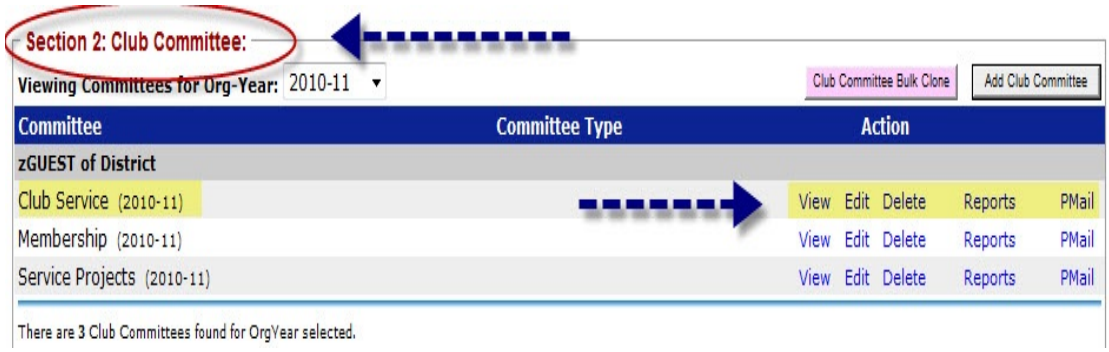
- **Security** Tab - The **Security** tab displays the **View Security** and **Edit Security** drop-down menus; the table includes all database security levels. These options are used to override the system default security levels.

When the committee is added, it will show up under **Section 2: Club Committees**.



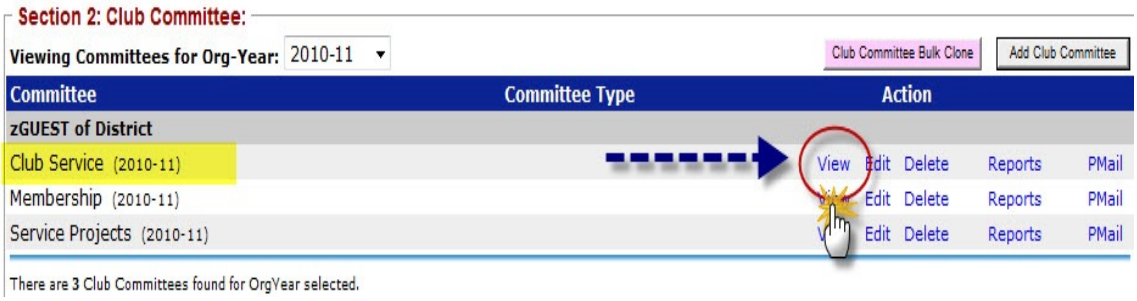
## Section 2 - Club Committee: Action Links

For the club committees listed in the lower section of the **Section 2 - Club Committees** on **My CLUB** page, there are five links - View, Edit, Delete, Reports, and PMail. These links function as "shortcuts" that allow you to view/update committee data from the **My CLUB** tab.

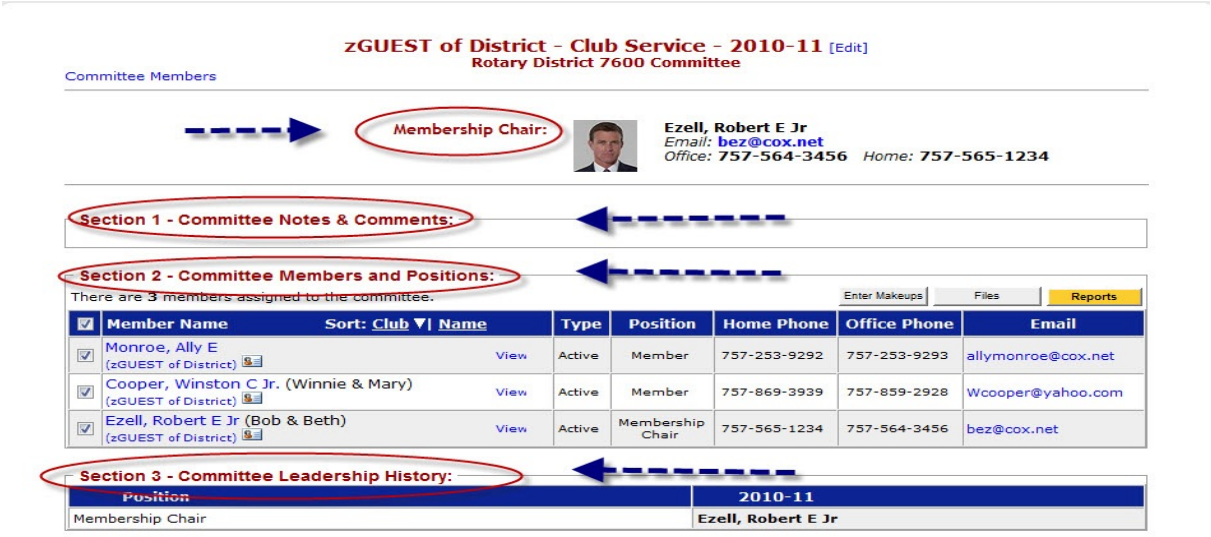


## Section 2 - Club Committee Action: View Committee

The Committee View link displays the Committees page for a particular committee and consists of four separate sections.




- **Committee Chairman** - At the top of the page, the chairman information is listed for that particular committee, along with that club member's information. The chairman's email is a hyperlink so that you can email the chairman from this page.
- **Section 1: Notes and Comments** - This section is available for optional freeform notes - This data is entered in the Committee Description section on the Committee Admin page.
- **Section 2: Committee Members and Positions** - This section list the committee members and committee positions.
- **Section 3: Committee Leadership History** - This section identifies who the Committee Chairman is for the current year and for the previous year.



## Section 2 - Club Committee: View Links

At the upper left-hand corner of the page is a Committee Member link that will take you directly to the lists of committees (**Section 2 - Committee Members and Positions**).

At the top middle section of the page is an [Edit] hyperlink. By clicking on this link, the **Committee Admin** page will be displayed with administrative functions (committee information and description, committee formats, security levels plus members and positions changes).

Within the **Section 2 - Committees and Positions** section, the Member Name link displays the Microsoft Outlook window to send an email to the committee member; the Club Name link transfers to the **My CLUB** page. The View link transfers to the **Member Detail** page. The Email link will send an email to the committee member.

The committee list also has two sorting options and these fields are the **Club** and **Name** columns.

## Section 2 - Committee Members and Positions: Administrative Functions

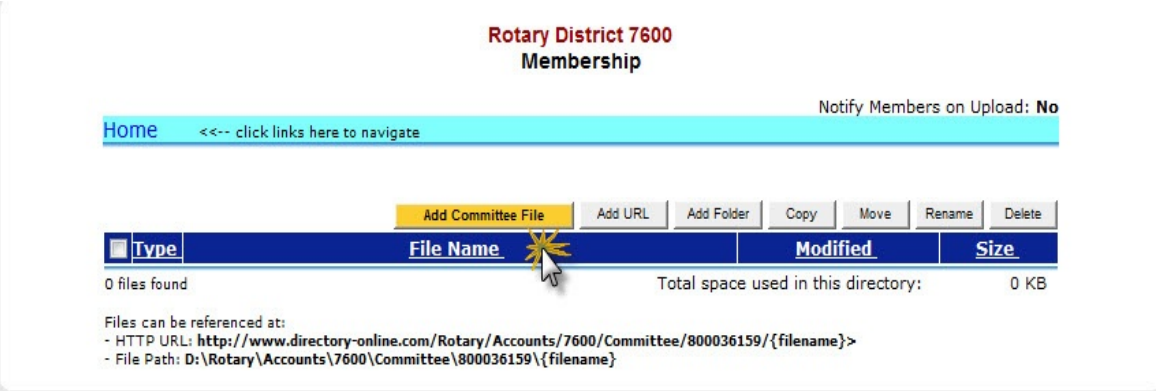
Five links in the upper right-hand corner of the **Section 2 - Committee Members and Positions** section define the administrative processes for the current committees.

- **Enter Makeups** - By clicking on this link, the **Entered Banked Makeup** page is displayed.

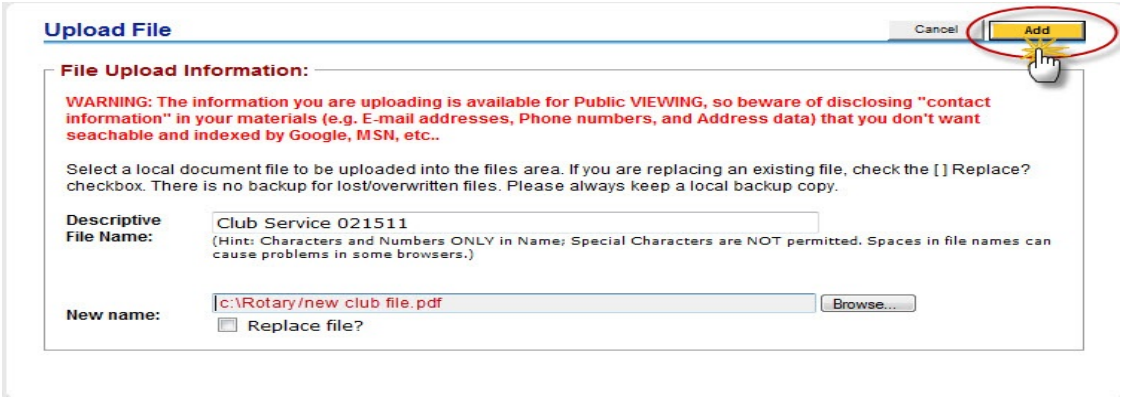
Note: in order for a committee member to be included in the banked makeup process, ensure that all applicable names are clicked "on" at the right of the committee member's name on the committee membership page. The time spent in the meeting can be considered a regular Rotary meeting. The committee members can "bank" this time to make-up for any missed meetings. The input fields are "Calendar Date" and an optional "Other Members Present**:"** field for listing any other Rotary members attending the meeting/venue. The "Makeup Venue**"** can be a committee meeting, an event (such as a Rotary Club outing), or Rotary related project and can be changed to reflect this. To generate the banked makeup transaction, please click the **Submit** button at the bottom of the page.

- **Files** - By clicking on **Files** button, an upload page is displayed and files related to that particular committee can be uploaded to the database.

The **Files** page includes file manipulation processes: **Add URL, Add folder, Copy, Move, Rename, and Delete**. The gold **Add Committee File** button will transfer to the **Upload File** page.

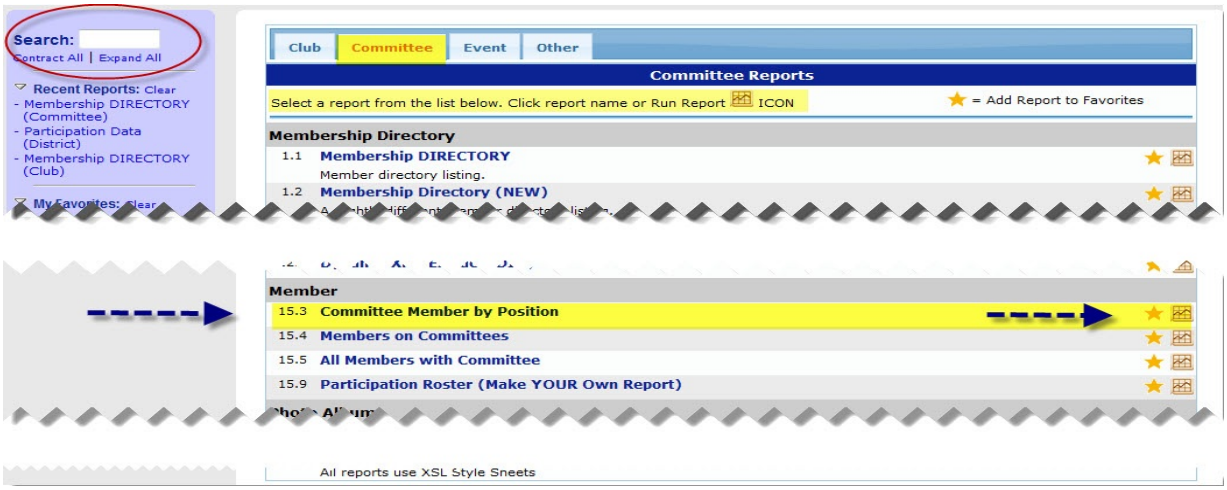



Below is the **Upload File** page. The data input fields are **Descriptive File Name** and **New Name** where the new file is added to be uploaded. There is a "**Browse**" button to assist in finding the file on your computer. By clicking the gold **Add** button, the file is adding to the database committee files.

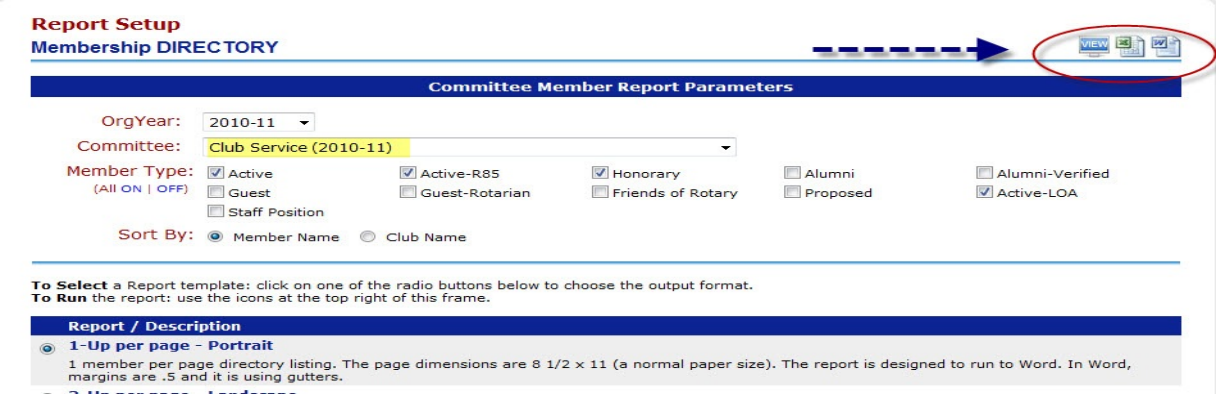


**Reports** - By clicking on the **Reports** link, the **Committee Reports** tab is displayed. This tab is the same as the **Committees** tab found on the database Home Page.

Reports can be selected by the **Run Report** icon found to the right of the report listing or by clicking on the **Committee Report** link. A **Search** option, found on the left-hand side of the page, allows you to search for specific reports.

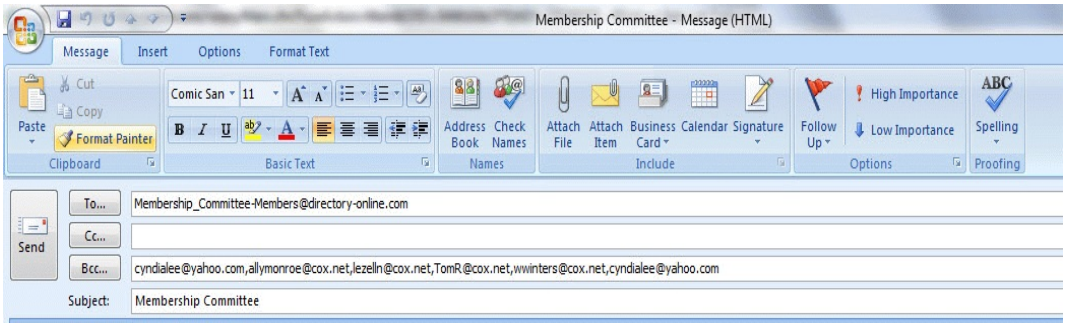



When the report icon is clicked, the **Report Setup** page displays and provides several options to format reports. The reports can be viewed on the screen or exported to an EXCEL spreadsheet or WORD documents.

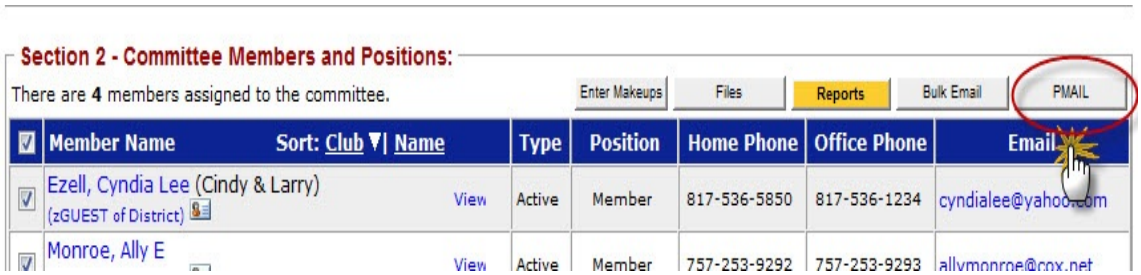



- **Bulk Email** - By clicking on Bulk Email button, a link will open Microsoft Outlook.

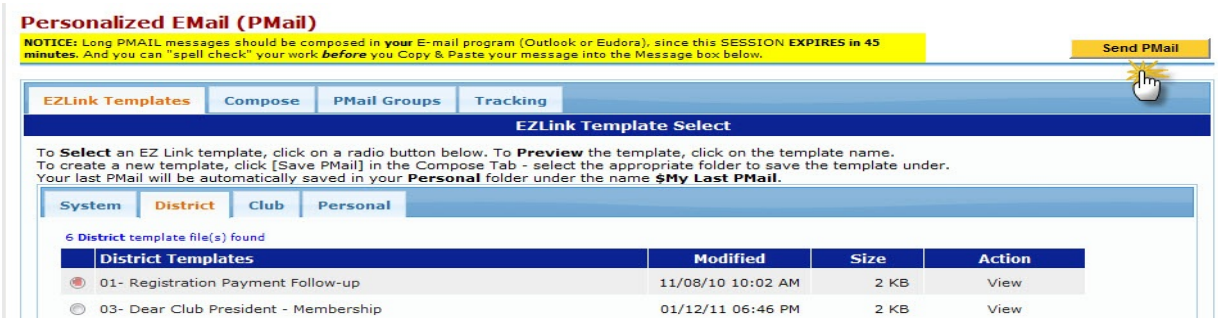
The email format will include those committee member email addresses. On the committee page, there is a default click box that will include all the committee members' emails on the bulk email. If only certain committee members need to be included, the default click box needs to be cleared and click on the committee members to select for the bulk email.



- **PMail Tab** - By clicking on this link, you can send a "personalized email" to your committee members.

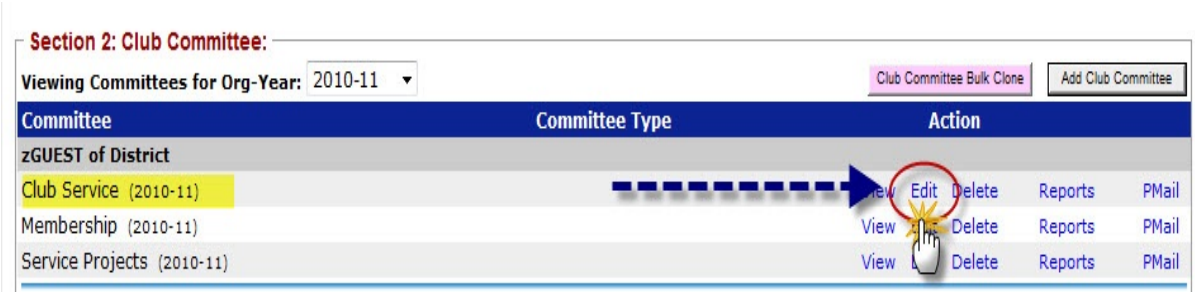



Use the templates that are categorized by: **System**, **District**, **Club**, **Personal**. See the **PMail** tab on the database Home Page for detailed instructions on how to create a PMail.



**Section 2 - Club Committee Action: Edit Committee**

The Edit link will transfer you to the **Committee Admin** page. Under the Edit function, an additional function tab not available on the View link, **Members and Positions tab,** is displayed on the **Committee Admin** page. The **Information**, **Options**, and **Security** tabs are discussed in the previous View Link section.

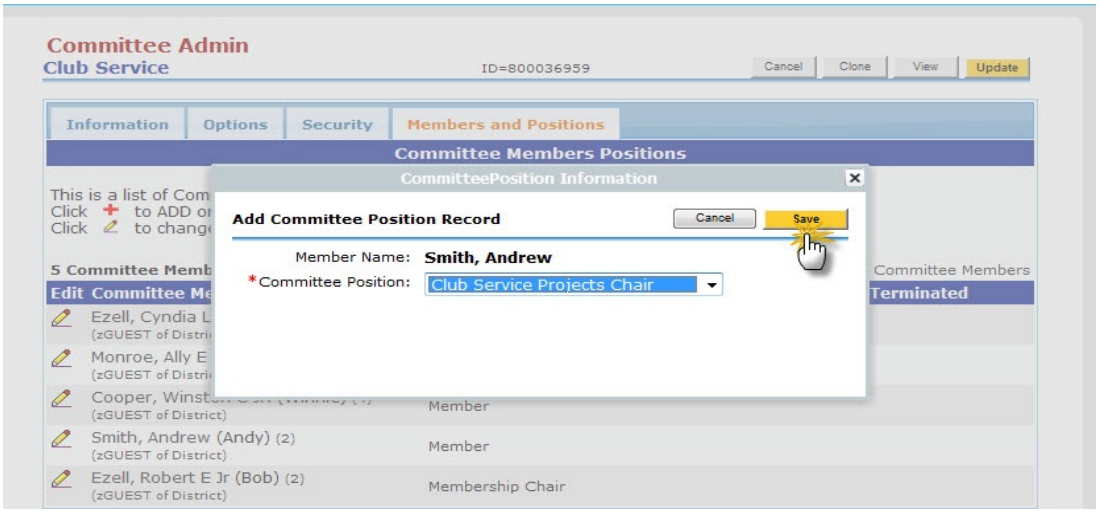



**Members and Positions** Tab - The **Members and Positions** tab displays the Committee listing that details the Committee member and Committee member's position on that committee.

In the upper right-hand corner of the committee listing is a "**+ Add/Delete Committee Members**" link. By clicking on this link, the **Manage Committee Members** page displays with two columns - one with all the club members on the left side and current committee members on the right side. Using the right and left arrows in the middle of the page you can move the members back and forth between the columns by clicking on the name and the appropriate arrow. Moving from left to right adds a member to the committee. Moving from right to left, deletes a member from the committee. Additionally, there is a "Find" function and a "Display By:" function at the top left-hand corner of the page that can be used to filter or refine the process.

The **Committee Members and Positions** tab also has the **Edit** function (pencil icon) that is to the left of the committee member's name.

By clicking on the pencil icon, a pop-up page gives you the option, in a drop-down menu, to change the club position via a table of all club positions descriptions. Click "**Save**" to update the database and refresh the page with update data.



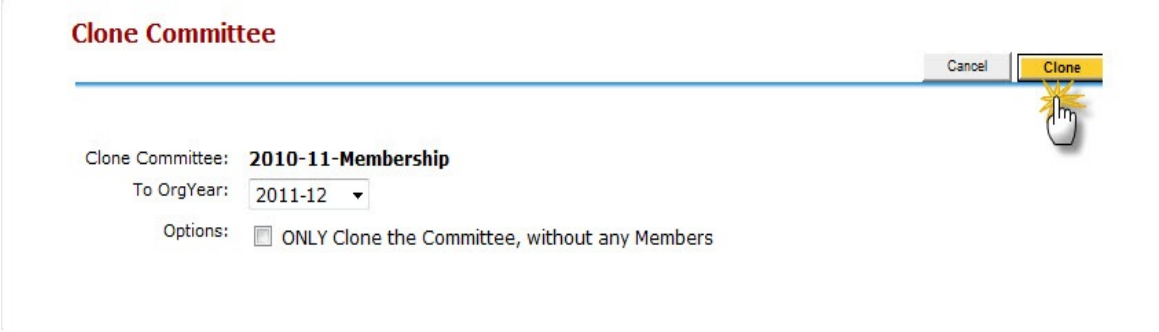
## Section 2 - Committee: Edit Administrative Functions

The Committee Admin page contains four functions to add/modify the committee information under the Edit link.

**Cancel** - Use the Cancel button to undo any modifications made on the Committee Admin page. By clicking on this button, the page will transfer from the Committee Admin page to the Committee Tab on the database Home Page. The Committees are displayed.

**Clone** - Use the **Clone** button when you want to a clone a committee for the next year, either with or without the current club members.

There is also a checkbox option to exclude the current members in the cloned committee for the next year. The Org-Year drop-down menu has a table of 30+ years to choose from. Once the new committee is cloned for the upcoming year, it cannot be created again. An error message will display: "**Problem! A committee with the same Committee Name already exists in year (20nn-nn). You cannot clone this committee again**". Click on the **Clone** button to activate these changes. This is the same page that is displayed for the **Bulk Clone Club Committee**.

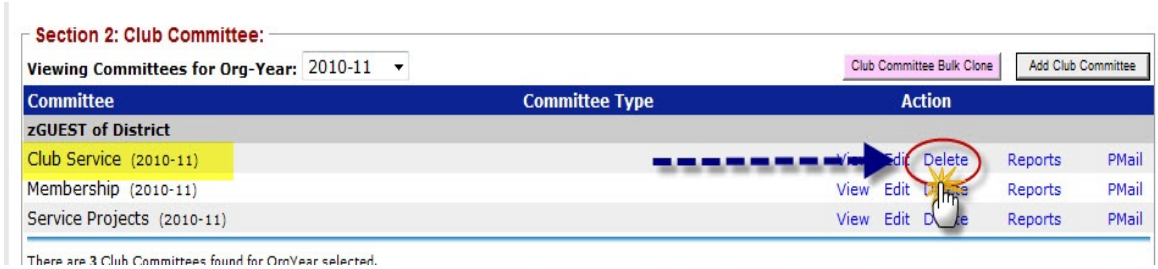



**View** - Use the **View** button when you want to view a particular committee's data.

**Update** - Use the **Update** button to save modifications made to the **Committee Admin** pages. By clicking **Update** button, the page refreshes with the updated committee data.

## Section 2 - Club Committee Action: Delete Committee

The Delete link displays the Committee Admin page. This function can delete a committee within any of the function tabs - **Information, Options, Security,** and **Members and Positions -** on this page.

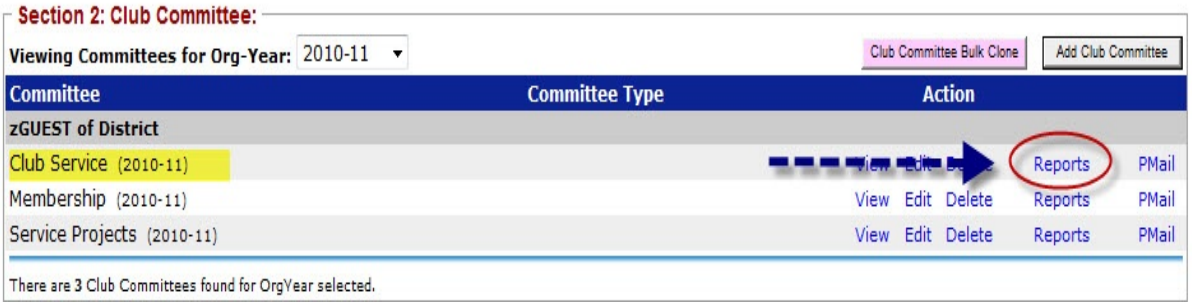


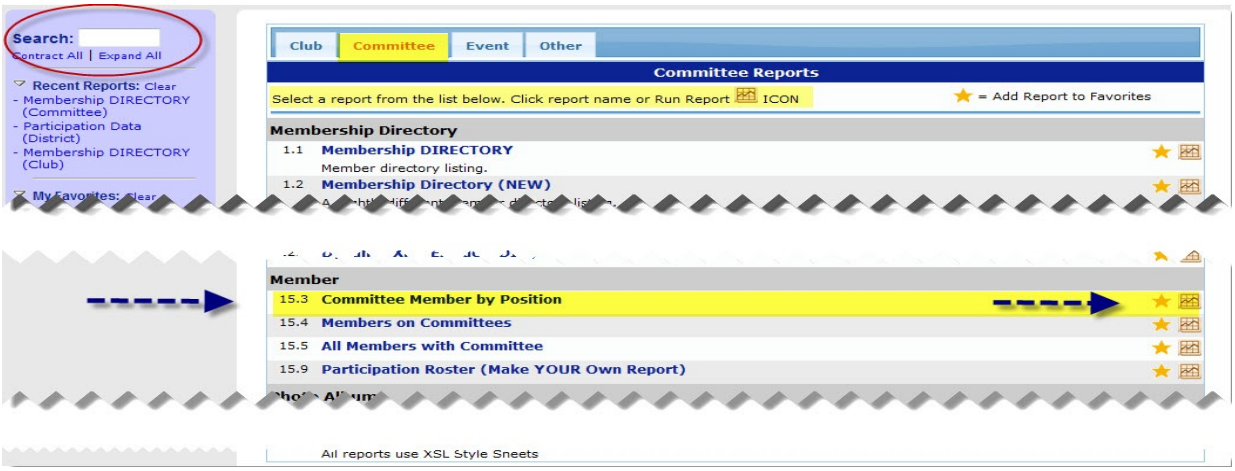

By clicking on the Delete button, a pop-up window is displayed with the following warning message: "**Please confirm - this will PERMANENTLY delete the selected records**". By clicking the "**OK**" button, the data will be deleted and the page will transfer to the **Committees** tab on the Home Page.

## Section 2 - Club Committee Action: Committee Reports

The Reports link is the same as Member Listing that is found at the top of the **My CLUB** page. Additionally, the **Reports** tab can be found on the database Home Page. See **Reports** Tab for reporting functions also.

**Reports** - By clicking on the **Reports** link, the **Committee Reports** tab is displayed. This tab is the same as the **Committees** tab found on the database Home Page.

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