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Committee Manager

Updated for Build 20162

PrimeGov are excited to launch our new product offering – Committee Manager. The Committee Manager feature set provides support for the multiple processes involved in managing positions in committees, including:

- A new Applicants dashboard, to quickly and easily see the status of applicants and move them through their application workflow
- A new members dashboard to quickly and easily access current and historic members position data
- Ability to track training requirements per position and training completed per member; allowing the user to track which members do not meet the requirements of their assigned seats
- Enhancements across the current product to support this process:
 - Extension in the current Committee area to cater for new custom fields per Committee
 - Extension in the current User area to cater for new custom fields per user (Member)
 - Extension in the current Committee positions area to cater for additional fields, the ability to link an application form to a position and term, and to publish the term vacancy for public applicants
 - Expansion of the current workflow options to cater for new steps required in the application process
- Customizable forms and workflows, built on our existing workflow base
- Abilities to send emails to members and applicants recommending positions or informing them of assigned training needs
- Several configurable and exportable reporting options
- Dashboards to provide at-a-glance details on important Committee Manager information
- Access to Committees can be controlled by role-based permissions already in place in the product
- Public facing pages for each Committee in our Boards and Commissions Public Portal, providing:
 - Configurable Committee details
 - Membership and member details
 - Access to apply for positions on the committee
 - Upcoming meeting details
 - Share public documents relevant to the Committee


Please speak with your PrimeGov representative to discuss enabling this feature set

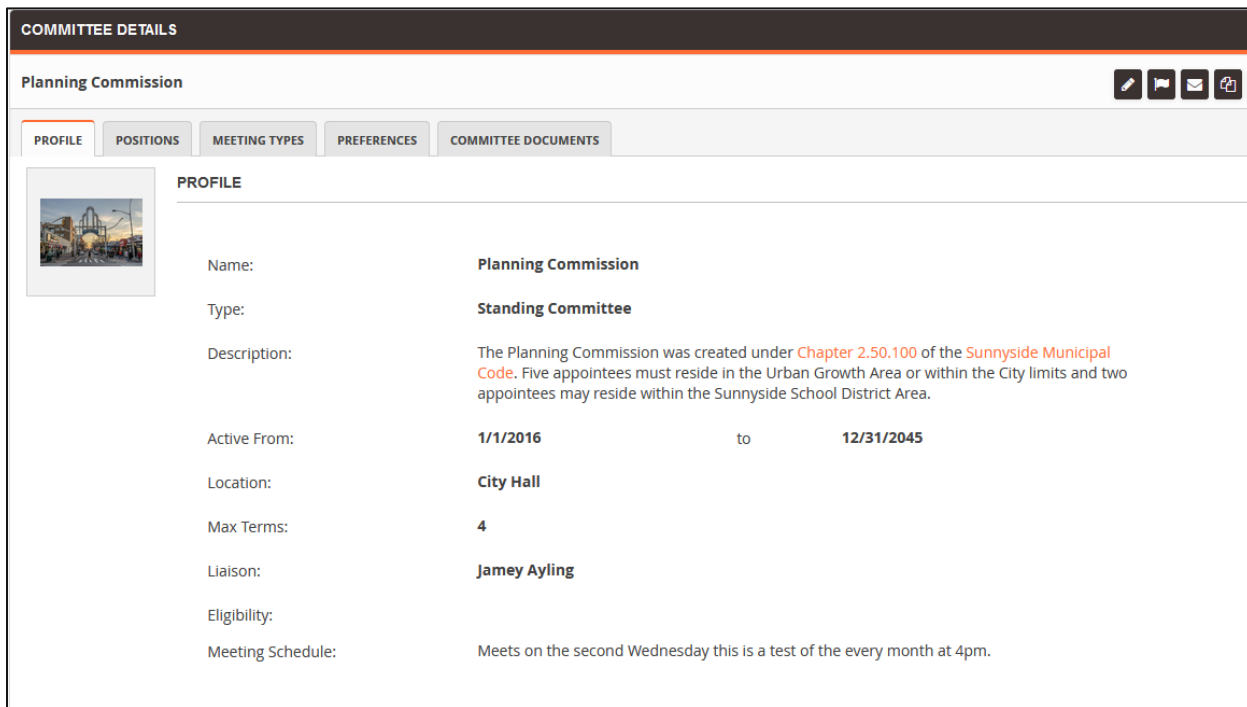
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Manage Committee Details

Manage Committee Information

All system and custom fields for each Committee will appear when the Committee is selected in the 'Committees' area of the product. Committee system fields will appear first, followed by the defined committee custom fields, in the order selected in the Admin area. All fields can be edited by selecting the edit icon, , for the Committee and selecting 'Save' when edits are complete.




COMMITTEE DETAILS

Planning Commission

PROFILE POSITIONS MEETING TYPES PREFERENCES COMMITTEE DOCUMENTS

PROFILE



Name: Planning Commission

Type: Standing Committee

Description: The Planning Commission was created under [Chapter 2.50.100](#) of the [Sunnyside Municipal Code](#). Five appointees must reside in the Urban Growth Area or within the City limits and two appointees may reside within the Sunnyside School District Area.

Active From: 1/1/2016 to 12/31/2045

Location: City Hall

Max Terms: 4

Liaison: Jamey Ayling

Eligibility:

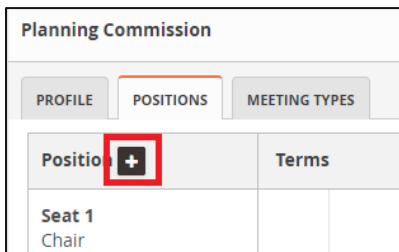
Meeting Schedule: Meets on the second Wednesday this is a test of the every month at 4pm.

Manage Positions

Selecting the 'Positions' tab for the Committee will display all positions and associated terms for the selected Committee.


Add a New Position

1. Select the add icon for Position



Planning Commission

PROFILE POSITIONS MEETING TYPES

Position  Terms

Seat 1

Chair

2. Provide the position details
 - a. Position Name – name for the position
 - b. Sub Title – additional title information if required
 - c. Note – additional content for reference
 - d. Type – One of 'Board Member' or 'Council Member'
 - e. Nominating Entity – selected from the options provided in the Committee Manager Admin area
 - f. Appointing Entity – selected from the options provided in the Committee Manager Admin area
 - g. Initial Term Length – the required length for the first term in the position, in years. The positions initial term will be added from the position start date for this length of time
 - h. Max Term Length – the required length for all subsequent terms in the position, in years. Subsequent terms will be auto calculated following the initial term until the position end date
 - i. Position Start – start date for the position as a whole
 - j. Position End – end date for the position as a whole

- k. Required Training – select one or more entries from the list provided in the Committee Manager Admin area
- l. Required Qualifications – enter any required qualification notes for reference here
- m. Allow Public Applications – checkbox to allow the advertisement of any terms for this position on the public portal
 - i. Default Application Form – provided a default form value for any term that is being advertised, selection from the list of current forms in the system
 - ii. Edit Application Form – opens a new tab with the selected form open for editing
 - iii. Create new application form – opens a new tab to create a new form

Position Information - Planning Commission

Position Name:

Seat 1

Sub Title:

Chair

Note

Note

Type:

☒ Board Member
 ☐ Council Member

Nominating Entity:

City Clerk

Appointing Entity:

Council

Initial Term Length:

2

Years

Max Term Length:

4

Years

Position Start:

01/01/2020

Position End:

12/31/2040

Required Training:

Health and Safety x

Health and Safety

Required Qualifications:

☐ Allow Public Applications:

SAVE



CANCEL

3. Select 'Save'

'Allow Public Applications' and default application forms can be managed in a single action for all positions in a Committee using the 'Preferences' tab, see


Manage Preferences below.

Update Existing Position

1. Select the edit icon,  , to edit any details for an existing position. Select 'Save' to save edits made
2. Select the delete,  , icon to delete an existing position and all related information

View Position History

The position history can be viewed to see all members that have served in a selected position. Information can be exported to your local machine in PDF or Excel format

1. Select the view icon, , beside the position name to view the position history
2. Select 'Excel' or 'PDF' to export the history information

Position History			
Seat 1 - Chair			
<div>Excel PDF</div>			
Term Start	Term End	Person	Status
01/01/2016	12/31/2017	Jane Doe	Term Completed
01/01/2018	12/31/2019	John Henry	Term Completed
01/01/2020	12/31/2021	Nici Sullivan	Active
Showing 1 to 3 of 3 Entries			
Previous		1	Next
CANCEL			


Manage Terms

Filled terms that are currently valid appear with a blue background with the member currently sitting the term shown. Previous filled terms in the past appear in grey. Terms that are vacant appear in green with a '+' symbol to denote that no member is currently assigned.

Edit/Vacate a Filled Term

1. Select the term to open
2. The member assigned and related term dates can be adjusted as required
 - a. Where term dates are adjusted to shorten the term, any gap that remains between this term and the next term will be auto populated with a vacant term



Edit Term Details	
Committee:	Housing Authority
Position Name:	Test Position
Term Length:	1 year 11 Months 27 Days
Appointment Date:	<input type="text"/>
Appointing Entity:	<div>Mayor</div>
Person:	<div>Nancy Reagan</div>
Vacate Position:	<input type="checkbox"/>
Term Start	<div>03/02/2020</div> End <div>03/01/2022</div>
<div>SAVE</div> <div>CANCEL</div>	

3. The appointment date and appointing entity can be set or adjusted as needed
 - a. This appointing entity field will only show if it has been configured, see Allow Appointing Entity Options On Terms
4. The member can be removed from the position by selecting the delete icon, . This will remove the member and all related details for that member in this term
5. The term can be vacated also. Vacating a term will mark the serving member as vacated for this term.
 - a. Select 'Vacate Position'
 - b. An alert will appear to inform you that once this is completed and saved, you will be no longer permitted to make some edits to this term.
 - c. Confirm alert by selecting 'Yes'

- d. End date for the term is updated to today's date, which can be adjusted if required
6. Select 'Save'

View User Profile Dialog

The contents of the user profile dialog are detailed below. This is accessible from two locations in this view:

1. From the Position tab – select the view user icon, , in the relevant term to view the profile of the current assigned user for that term
2. From the 'Edit Term' view, for vacant and filled terms – select the view user icon, , beside the 'Person' field to view the profile of the current entered user

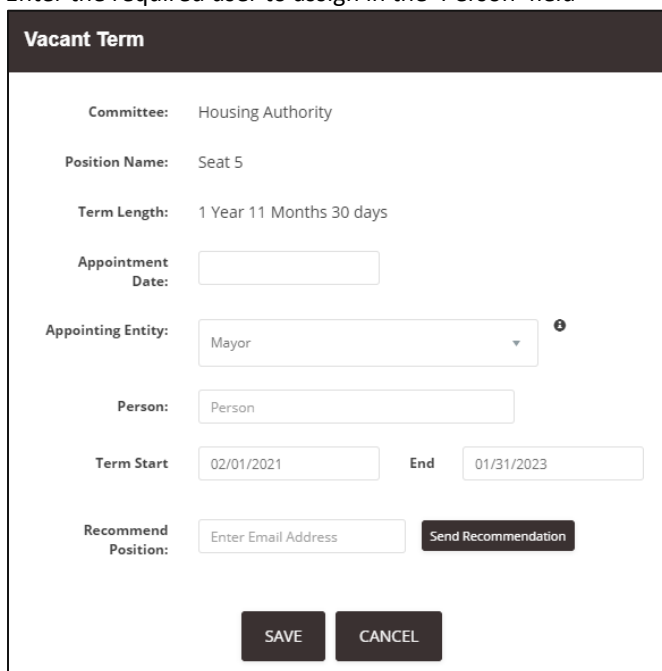
Edit a Vacant Term

Terms dates can be edited in vacant terms. Where term dates are adjusted to shorten the term, any gap that remains between this term and the next term will be auto populated with a vacant term

1. Select the vacant term to edit the term
2. Adjust the dates as needed
3. Select 'Save'

Assign a Member to a Term

1. Select the vacant term to edit the term
2. Enter the appointment date if you wish to track this information
3. Adjust the appointing entity if required
 - a. This field will only show if it has been configured, see Allow Appointing Entity Options On Terms
4. Enter the required user to assign in the 'Person' field



Vacant Term

Committee: Housing Authority

Position Name: Seat 5

Term Length: 1 Year 11 Months 30 days

Appointment Date:

Appointing Entity: ⓘ

Person:

Term Start: End:

Recommend Position:

5. Select 'Save'

Send Recommendation

The 'Send Recommendation' functionality is available from multiple locations within the product and allows the user to send an email to any email address, recommending a particular term of a position to them. Where the position is advertised, a link to the relevant form for applications will also be provided.

Advertise a Position or the Next Vacant Term

Note: The options described below will only appear for positions where 'Allow Public Applications' is enabled

1. Positions not currently advertised will display an 'Advertise' option



2. Select 'Advertise' to view options to select one of:
 - a. 'Advertise Position' – allows a generic application to the position without specifying term dates. On the Boards & Commissions portal this position will appear in the vacancies area but term dates will read 'To be confirmed'. Term dates can be supplied later in the workflow if the application is approved.
 - i. A dialog will appear to confirm the required application form for this position. If an application form is set in the position, it will be selected here by default but can be adjusted if needed
 1. Edit Application Form – opens a new tab with the selected form open for editing
 2. Create new application form – opens a new tab to create a new form
 - b. 'Advertise Next Term' – allows you to advertise the next available term in this position. The system will identify the next term from today's date where no member is currently assigned.
 - i. A dialog will appear to confirm the term dates and the required application form for this position. If an application form is set in the position, it will be selected here by default but can be adjusted if needed
 1. Edit Application Form – opens a new tab with the selected form open for editing
 2. Create new application form – opens a new tab to create a new form
 3. Select 'Advertise Position'/'Advertise Term' to confirm and advertise this vacancy on the Boards & Commissions portal
 4. Once advertised the UI will show an option to 'Stop Advertising'



5. Select this option and confirm in the dialog that appears, to remove the vacancy from the Boards & Commissions portal

Manage Preferences

Some settings can be set across all positions in one action using the 'Preferences' tab

COMMITTEE DETAILS

Planning Commission

PROFILE

POSITIONS

MEETING TYPES

PREFERENCES

COMMITTEE DOCUMENTS

Application Preferences

☐ Allow general applications to committee ⓘ

☒ Allow all positions to be advertised

Default Application Form:

~select~

Edit application form

Create new application form

Portal Visibility Preferences

☒ Show in Public Meetings Portal/Item Search

☒ Show in Boards and Commissions Portal

From here you can:

Allow for general applications to Committee

When this option is enabled an 'Apply for Membership' option will be added on the top right area of the Boards and Commissions portal for the selected Committee

Profile

Members

Vacancies

Planning Commission

Type
Standing Committee

The Planning Commission was created under Chapter 2.50.100 of the Sunnyside Municipal Code. Five appointees must reside in the Urban Growth Area or within the City limits and two appointees may reside within the Sunnyside School District Area.

Active From
2016-01-01

Active To
2045-12-31


Location
City Hall

Max Terms
4

Liaison
Jamey Ayling

Meeting Schedule
Meets on the second Wednesday this is a test of the every month at 4pm.

Apply for membership



Application submitted here are for the Committee in general and do not require a position or term dates to be specified in the original application. When applications are submitted through this option, the related workflow is required to have a step of type 'Update Application Position' which will allow PrimeGov user to supply the specific position and term dates to the application prior to adding the applicant to a position.

Allow all positions to be advertised

When enabled this option will set the 'Allow Public Applications' option for every position in this Committee. This option is intended to save time for users when each position is to be enabled for public applications.

Default Application Form

If a form is selected in this option, the selected form will be provided as a default in all positions for the Committee. This option is intended to save time for users when each position uses the same form.

Portal Visibility Preferences

Each Committee can be enabled to appear in each of our public portals

- Show in Public Meetings Portal/Item Search – when enabled this Committee will appear in the ‘Archived Meetings’ area of our Public Meetings Portal, and will appear for any filters related to Search
- Show in Boards and Commissions Portal – when enabled this Committee will appear in the Boards and Commissions Portal

Manage Committee Documents

This area allows the user to upload documents that are related to the Committee directly. Each document can be set to show on the Boards and Commissions Portal or can be stored for logged in user only. Access to manage these documents is controlled by new permissions.

COMMITTEE DETAILS

Planning Commission

PROFILE POSITIONS MEETING TYPES PREFERENCES COMMITTEE DOCUMENTS

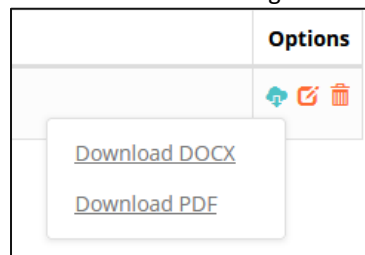
In this area the user can upload relevant documents for the committee and select whether they will be displayed to members of the public through the Boards and Commissions public portal. Use the checkboxes to the left of each table row to select if the document should be visible on the Boards and Commissions portal or not. Drag rows to re-order their display on the public portal.

+ Add Document

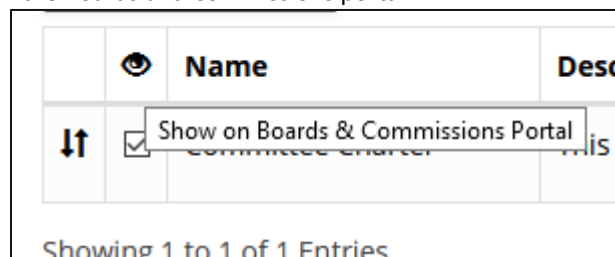
		Name	Description	Options
	<input checked="" type="checkbox"/>	Committee Charter	This charter contains details on the rules and regulations set forth for the Planning Commission	

Showing 1 to 1 of 1 Entries

- Select ‘Add Document’ to add a new document
- Select the download icon, , to download a copy of the document. Where the original document is not a PDF, you will be presented with options to download the original file or download the PDF version




- Select the edit icon to edit icon, , to edit the document details
- Select the delete icon, , to delete the document
- Select the checkbox, ☒, in the ‘Show on Boards & Commissions Portal’ column, under the icon, to display this document on the Boards and Commissions portal






- Select the reorder icon, , to reorder the documents in the list. Documents are shown on the Boards and Commissions portal in the order provided in this list

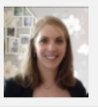
Manage User Details

Manage User Information

All system and custom fields for each user will appear when the user is selected in the System Administration -> Users area of the product. User system fields will appear first, followed by the defined user custom fields, in the order selected in the Admin area. All fields can be edited by selecting the edit icon, , for the user and selecting 'Save' when edits are complete.

ACCOUNT DETAILS

NICI SULLIVAN, Assistant Clerk   



PROFILE		CONTACT INFORMATION	
First Name:	Nici	Email:	nicola.higgins@primegov.com
Middle Name:		Phone:	123-456-789
Last Name:	Sullivan	Mobile:	000-555-8888
Position:	Assistant Clerk	Fax:	
Department:	Finance		
Division:	City Clerk		
Reports to:	Orla Healy		
Home Page:	Items		
Bio:	Nici has been assistant Clerk for over 15 years. She works primarily with the Planning Commission.		
LinkedIn Profile:	linkedin.com/nicisullivan		
Office Address:	123 Main St, New York City		


User Profile Dialog

Accessible from multiple locations within the application, the user profile dialog provides information related to the selected user from a variety of sources.


The user profile dialog is also available for applicants, but many features may not be available if the applicant has not been a user in the system or a member of a previous committee

Profile

Selected by default on load of the user profile dialog

User Details - Nici Sullivan 

PROFILE APPLICATIONS HISTORY TRAINING DOCUMENTS **Actions**



Bio

Nici was born and raised in this town and has been happily serving the members of district 4 for over 8 years.

Details

First name
Nici

Middle Name
N/A

Last Name
Sullivan

Position
Accounting Supervisor

Department
Communications

Contact Details

Email
nicola.higgins@primegov.com

Phone
123-456-789

Mobile
N/A

Attendance

100%

0 meetings missed of 85

Voting

Nici Sullivan For	32
Majority For	31
Nici Sullivan Against	4
Majority Against	4


CANCEL

On the left of this tab you will be able to see the user profile photo, all system user fields and any custom user fields that have been enabled to 'Show on user profile' in the Admin area.

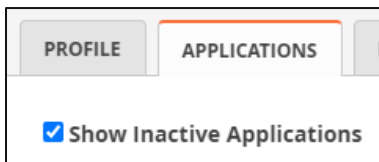
On the right of this tab you can view attendance and voting records for the selected user:

- Attendance – a graphical and written representation of the number of meetings where the user was recorded as present against the number of meetings where this user was a recorded member
- Voting – a graphical and written representation of:
 - o Number of votes in which the selected user voted for a selected motion
 - o Number of votes where the selected users voted for a selected motion, where the majority of members also voted for the motion
 - o Number of votes in which the selected user voted against a selected motion
 - o Number of votes where the selected users voted against a selected motion, where the majority of members also voted against the motion

Applications

Shows all active applications in progress for the selected user. The related Committee and position is displayed, as well as the status of the current application. Where configured, the related application form can also be viewed by selecting the view icon, .

Inactive applications can also be shown if required



History

Shows all historical information for the members of the selected user

User Details - David Suttle

PROFILE

APPLICATIONS

HISTORY

TRAINING

DOCUMENTS

Actions

Current Positions

Committee	Position	Term Start	Term End	Term Status
Board Of Directors Meeting	Chairman	01/01/2019	10/28/2020	Active
Administration & Budget Committee (ABC)	Postion 2	01/01/2020	11/28/2020	Active

Showing 1 to 2 of 2 Entries

Previous1Next

Past Positions Served

Committee	Position	Term Start	Term End	Term Status
Administration & Budget Committee (ABC)	Postion 2	11/29/2018	12/31/2019	Term Completed
Planning Commission	Seat 3	01/01/2020	10/05/2020	Vacated

Showing 1 to 2 of 2 Entries

Previous1Next







CANCEL


Current Positions show all position terms where the selected user is currently serving or where the selected user is assigned to start a future position term. Term Status shows if the position is an active term, 'Active' or a future term, 'Upcoming'.


Past Positions Served shows all terms where the selected user served previously but the term has ended. Term Status here shows if the position ended as expected, 'Term Completed', or if member was marked as vacated, 'Vacated'


Training

Shows all training entries recorded for the selected user and provides a method to enter new training entries

Training Type	Title	Source	Training Time	Date Added	Expiration	
Health And Safety Certificate Level 2	Health And Safety	Online	0 Hours	10/11/2020	10/01/2022	  
Manual Handling	Manual Handling Level 2	Classroom	4 Hours	10/11/2020	12/11/2022	  

To view any training certificated attached for a training entry, select the view icon, , for the entry. The attached document for the training entry will be opened in a new tab.

To edit an existing training entry, select the edit icon, , for the entry. Make any edits required and select 'Save'.

To delete an existing training entry, select the delete icon, , for the entry

To add a new training entry:

1. Select 'Add Training'
2. Populate the field in the dialog that appears
 - a. Training Type – choose from the training types that have been entered in the Committee Manager Admin area
 - b. Training Title – choose from available training entries for the selected training type
 - c. Training Source – Select one of 'Online' or 'Classroom'
 - d. Training Time – Record the number of hours spent in training
 - e. Start Date – The start date for any related training certification
 - f. Expiration Date – The expiration date for any related training certification
 - i. If the training entry has a value set for validity in the Committee Manager Admin area, this date will be auto calculated from the start date provided
 - ii. Leave blank for training that does not expire. Select 'Remove Expiration Date' to clear this field
 - g. Add Certificate – Allows you to upload a single document to the training entry. Previous documents will be replaced if a new document is uploaded.
 - i. Additional documents related to the training can be added to the user profile using the 'Documents' tab

Add Training - Nici Sullivan

Training Type: Health and Safety Certificate Level 2

Training Title: Health and Safety

Training Source: ☒ Online ☐ Classroom

Training Time: 7 Hours

Start Date: 01/10/2020

Expiration Date: 01/10/2022 [Remove Expiration Date](#)

[Add Certificate](#)

[CANCEL](#) [SAVE](#)

3. Select 'Save'

Documents

Any documents that are related to this user will appear here. Documents are added to the user profile

1. When generated through workflow step 'Add Document to Application' for any application
2. When attached to a training entry
3. When added through the documents tab

File Name	Document Type	Date Added	Notes	
Attachment 4.Docx	Other	10/11/2020	Provided During Application To Show Previous Experience	
Health And Safety	Training	10/11/2020		
Manual Handling Level 2	Training	10/11/2020		

To view any document, select the view icon, , for the entry. The document will be opened in the viewer in a new tab.

To edit an existing document, select the edit icon, , for the entry. Documents and their associated note can be updated.

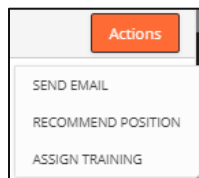
- If you add a new file from here, the current file will be replaced.
- Training entry attachments cannot be updated here, but a note can be added to the entry.

To download an existing document, select the download icon, , for the entry

To delete an existing document, select the delete icon, , for the entry. Training entry attachments cannot be deleted here.

Actions

The actions menu allows you to access several common features



- Send Email – opens a blank email dialog with the users email address pre-populated in the 'To' field
- Recommend Position - allows the user to send an email to any email address, recommending a particular term of a position to them. Where the position is advertised, a link to the relevant form for applications will also be provided
- Assign Training - opens a new email, pre-populated with details on the training that the relevant user needs to complete

Members & Applicants

The Members & Applicants area allows you to view information on current, and historic, members and to view and update information related to applications.

Members



Members are valid system users that have been assigned to one or more term in any Committee in the system.

View Members



The members tab is selected on initial load of this area. This tab shows information on all current serving members in Committees today. Information for historical terms can be viewed by selecting 'Also Show Historic Members' at the top of the list of members.

MEMBERS AND APPLICANTS						
MEMBERS		APPLICANTS				
Add Member +		Search by Name or Email				
Also Show Historic Members		Group Actions				
	Name	Email	Committee	Position	Status	Actions
<input type="checkbox"/>	Aayushi Singhal	aayushi.singhal@primegov.com	Salary Commission	Seat 2	Multiple	
			Salary Commission	Seat 2	Upcoming	
			Salary Commission	Seat 2	Term Completed	
<input type="checkbox"/>	Antonia Soto	asoto@cityname.com	Board of Parks and Recreation	Seat 3	Term Completed	
<input type="checkbox"/>	Brittan Moore	bmoore@cityname.com	Planning Commission	Seat 1	Term Completed	
<input type="checkbox"/>	Christine Smith	csmith@cityname.com	Planning Commission	Seat 7	Term Completed	
<input type="checkbox"/>	Darrell Hall	dhall@cityname.com	Board of Parks and Recreation	Seat 2	Active	
<input type="checkbox"/>	De Ann Hochhalter	dahochhalter@cityname.com	Planning Commission	Seat 3	Term Completed	
<input type="checkbox"/>	Doris Matson	dmatson@cityname.com	Board of Parks and Recreation	Seat 1	Term Completed	
<input type="checkbox"/>	Jesse Hernandez	jhernandez@cityname.com	Salary Commission	Seat 2	Term Completed	
<input type="checkbox"/>	John Rodriguez	jrodriguez@cityname.com	Board of Parks and Recreation	Seat 7	Active	
<input type="checkbox"/>	Leroy Werkhoven	lwerkhoven@cityname.com	Planning Commission	Seat 5	Term Completed	
Showing 1 to 10 of 21 Entries						
		Previous 1 2 3 Next				



Information shown on this view is:

- Expand Option – the expand icon, , will appear for members where there are more than one entry available. Select the icon to expand the member and view individual entries. Expanded entries can be collapsed using the collapse icon, .

	Aayushi Singhal	Aayushi.singhal@primegov.com	Multiple	Multiple	Multiple
			Planning Commission	Seat 4	Upcoming
			Salary Commission	Seat 2	Upcoming
			Salary Commission	Seat 2	Term Completed

- Name – The name of the member. Selecting the will load the user profile dialog
 - Member names followed by a blue tick icon, , are current serving members. This information is also available in the status column – status would be 'Active' or 'Upcoming'
 - Member names followed by a grey tick icon, , are historic serving members. This information is also available in the status column – status would be 'Term Completed' or 'Vacated'
- Email – The email address available in the system for this user
- Committee – The Committee the member is associated with
 - Will read 'Multiple' for members who have entries on multiple Committees, expand to view details for individual entries
- Position – The position in the Committee the member is associated with
 - Will read 'Multiple' for members who have entries on multiple Committees, expand to view details for individual entries
- Status – The status of the term for the member
 - One of:

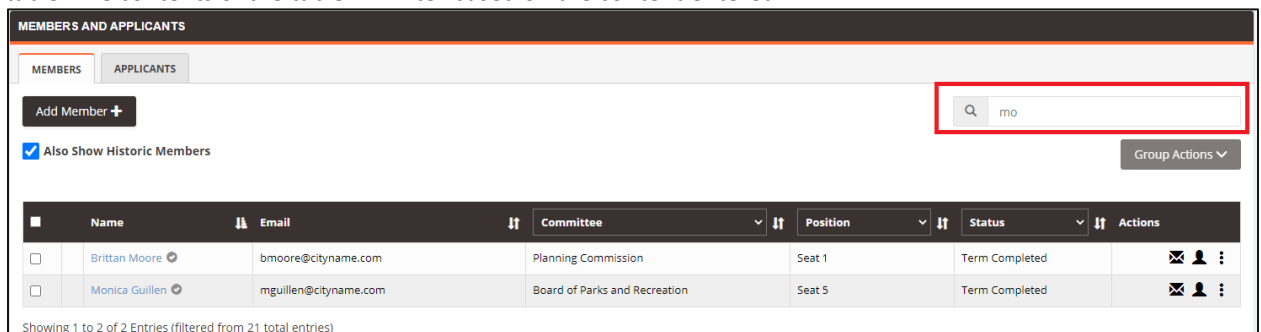
- Active – currently in progress based on today's date
- Upcoming – term has not started yet
- Term Completed – term end date has been reached and the member was not marked as vacated
- Vacated – term end date has been reached and the member was marked as vacated
- Will read 'Multiple' for members who have entries on multiple Committees, expand to view details for individual entries

All columns can be sorted by selecting  in the column title. The current sort order is shown by the icon  in the column title.

Filters Available

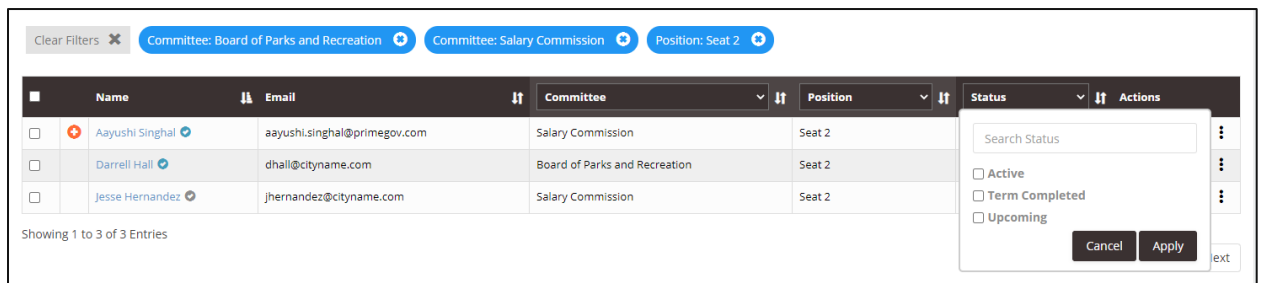
The list of members can be filtered in one of two ways:

- The name and email column can be filtered by entering the required filter content on the top right of the table. The contents of the table will filter based on the content entered



The screenshot shows a table titled 'MEMBERS AND APPLICANTS' with tabs for 'MEMBERS' and 'APPLICANTS'. A search bar on the right contains the text 'mo'. Below the search bar is a checkbox for 'Also Show Historic Members' and a 'Group Actions' button. The table has columns: Name, Email, Committee, Position, Status, and Actions. Two rows are visible: Brittan Moore (Planning Commission, Seat 1, Term Completed) and Monica Guillen (Board of Parks and Recreation, Seat 5, Term Completed).




- The Committee, Position, and Status columns can be filtered by selecting the dropdown menu available in the column title and selecting the required entries to filter by. Filters applied will be shown at the top of the table and can be removed by selecting the 'x' on the filter to clear an individual filter or selecting 'Clear Filters' to clear all filters



The screenshot shows the same table with filters applied: 'Committee: Board of Parks and Recreation', 'Committee: Salary Commission', and 'Position: Seat 2'. A dropdown menu for the Status column is open, showing options: Active, Term Completed, and Upcoming. The table now shows three rows: Aayushi Singhal (Salary Commission, Seat 2, Active), Darrell Hall (Board of Parks and Recreation, Seat 2, Term Completed), and Jesse Hernandez (Salary Commission, Seat 2, Upcoming).

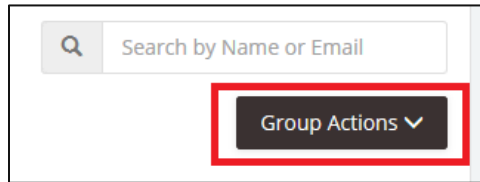
Individual Actions

Each entry on the table has a number of options available:

-  - Send Email – opens the system email dialog with the selected members email address populated in the 'Send To' field
-  - View User Profile Dialog – opens the user profile dialog for the selected user
- Select the three dots, , to view additional options:
 - Send Email – opens a blank email dialog with the users email address pre-populated in the 'To' field
 - Recommend Position - allows the user to send an email to any email address, recommending a particular term of a position to them. Where the position is advertised, a link to the relevant form for applications will also be provided
 - Assign Training - opens a new email, pre-populated with details on the training that the relevant user needs to complete

Group Actions

Multiple members can be selected on the table to use the 'Group Actions'

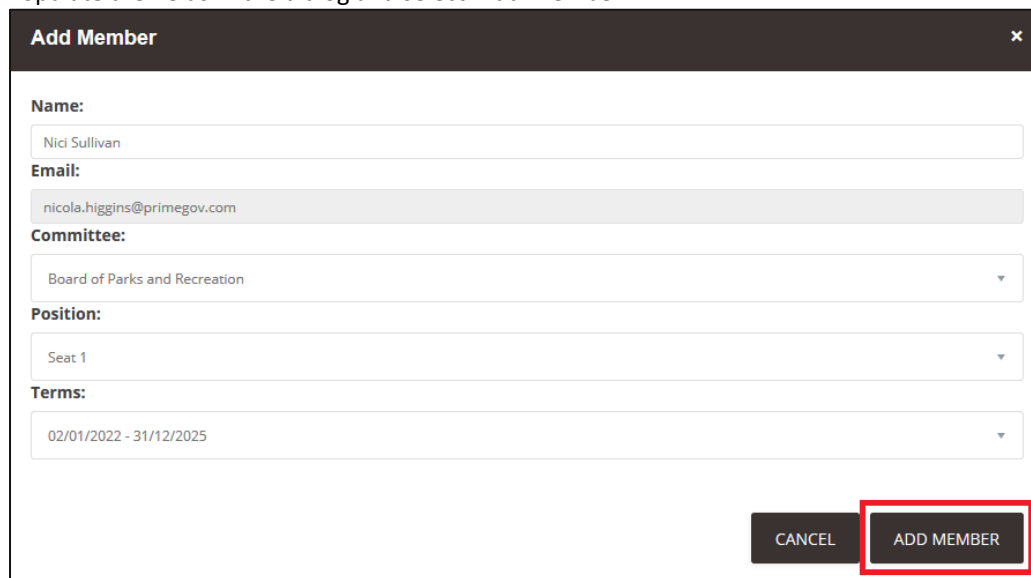
A screenshot of a user interface element. It features a search bar with a magnifying glass icon and the text "Search by Name or Email". Below the search bar is a dark button with the text "Group Actions" and a downward-pointing chevron. The button is highlighted with a red rectangular border.

All actions available here function the same as for individual entries, but all selected applicant email addresses appear in the 'Send To' field for the email

Add Member

The 'Add Member' option provide quick and easy access to add any user of the system to any open term.

1. Select 'Add Member +'
2. Populate the fields in the dialog and select 'Add Member'

A screenshot of a "Add Member" dialog box. The dialog has a dark header with the title "Add Member" and a close button (X). The main area contains several form fields: "Name:" with the value "Nici Sullivan", "Email:" with the value "nicola.higgins@primegov.com", "Committee:" with a dropdown menu showing "Board of Parks and Recreation", "Position:" with a dropdown menu showing "Seat 1", and "Terms:" with a dropdown menu showing "02/01/2022 - 31/12/2025". At the bottom right, there are two buttons: "CANCEL" and "ADD MEMBER". The "ADD MEMBER" button is highlighted with a red rectangular border.

Applicants

Applicants are people who have applied to one or more term in any Committee in the system.

Applicants are not yet system users. They cannot log into the system and they cannot be assigned to other terms until they have been added as valid system users through workflow. The exception to this is for existing members who have also applied to open terms – in this case the member is both a member and an applicant.

All applications that are made for the same email address will be linked together in the applicant list and the user profile dialog. Members who apply for positions using the same email address as the system has stored for them will have their applications and their historic information linked in the user profile dialog.

View Applicants

Select the 'Applicants' tab to view information on all active applications. This tab shows information on all current applications in process Committees today. Information for expired applicants can be viewed by selecting 'Also Show Expired Applicants' at the top of the list of applicants.

MEMBERS AND APPLICANTS

MEMBERS

APPLICANTS

Add Applicant

Q

Search by Name or Email

☐ Also Show Expired Applicants

Group Actions

	Date	Name	Email	Committee	Position	Term Info	Status	Actions
<input type="checkbox"/>	10/14/2020	Antonia Soto	asoto@cityname.com	Board of Parks and Recreation	Seat 1	01/02/2022 - 12/31/2025	Training check	
<input type="checkbox"/>	10/14/2020	Christine Smith	csmith@cityname.com	Finance Committee	Seat 3	01/02/2022 - 01/01/2024	Received	
<input type="checkbox"/>	10/14/2020	Darrell Hall	dhall@cityname.com	Planning Commission	Multiple	Multiple	Received	
<input type="checkbox"/>	10/14/2020	David Suttle	dsuttle@myemail.com	Finance Committee	Seat 3	01/02/2022 - 01/01/2024	Received	
<input type="checkbox"/>	10/14/2020	Jane Doe	jdoe@googlemail.com	Board of Parks and Recreation	Seat 1	01/02/2022 - 12/31/2025	Received	
<input type="checkbox"/>	10/14/2020	John Smith	johnsmith@googlemail.com	Planning Commission	Seat 3	07/01/2019 - 12/31/2021	Training check	
<input type="checkbox"/>	10/14/2020	Mary Kelly	maryk@email.com	Planning Commission	Seat 5	01/01/2022 - 12/31/2025	Received	
<input type="checkbox"/>	10/14/2020	Nici Sullivan	nicola.higgins@primegov.com	Multiple	Multiple	Multiple	Received	
<input type="checkbox"/>	10/14/2020	Paul Jones	pjones@google.com	Board of Parks and Recreation	Seat 1	01/02/2022 - 12/31/2025	Received	
<input type="checkbox"/>	10/14/2020	Paula Malavasi	paula.malavasi1@hotmail.com	Planning Commission	Seat 3	07/01/2019 - 12/31/2021	Received	



Showing 1 to 10 of 10 Entries

Previous



1



Next

Information shown on this view is:

- Expand Option – the expand icon, , will appear for applicants where there are more than one entry available for the same email address. Select the icon to expand the applicant and view individual entries. Expanded entries can be collapsed using the collapse icon, .

<input type="checkbox"/>		10/14/2020	Nici Sullivan	nicola.higgins@primegov.com	Multiple	Multiple	Multiple	Received
		10/14/2020			Board of Parks and Recreation	Seat 1	01/02/2022 - 12/31/2025	Received
		10/14/2020			Finance Committee	Seat 3	01/02/2022 - 01/01/2024	Received

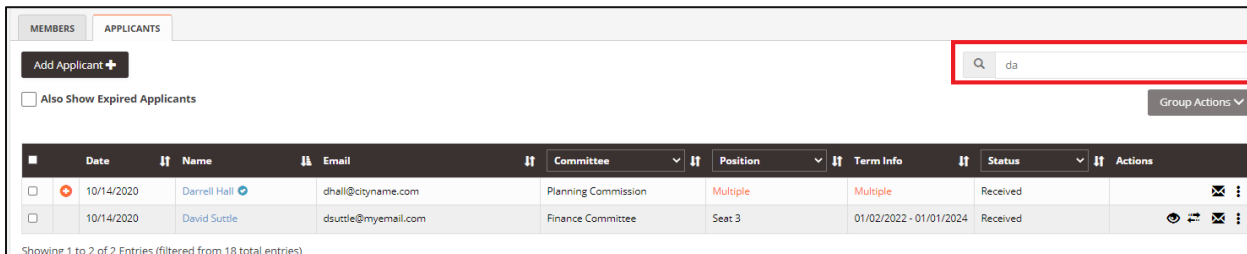
- Date – the date the application was received
- Name – The name of the applicant. Selecting the name will load the user profile dialog
 - User profile dialog contains the same options and feature for applicants who have been members previously and for applicants who have never served on a Committee, with the exception of the 'History' tab which is only available for applicants who have served previously. Content available for applicants will be minimal
 - Applicant names followed by a blue tick icon, , are current serving members who have applied for this new position
 - Applicant names followed by a grey tick icon, , are historic serving members who have applied for this new position
- Email – The email address available submitted in the form for this applicant
- Committee – The Committee the applicant has applied to
 - Will read 'Multiple' for applicants who have entries on multiple Committees, expand to view details for individual entries
- Position – The position in the Committee the applicant has applied to
 - Will read 'Multiple' for members who have entries on multiple positions, expand to view details for individual entries
- Term Info – The date range for the term the applicant has applied to
 - Will read 'Multiple' for members who have entries on multiple terms, expand to view details for individual entries
- Status – The status value is set by the workflow steps
 - Will read 'Multiple' for members who have entries on multiple status, expand to view details for individual entries

All columns can be sorted by selecting  in the column title. The current sort order is shown by the icon  in the column title.






Filters Available

The list of applicants can be filtered in one of two ways:

- The name and email column can be filtered by entering the required filter content on the top right of the table. The contents of the table will filter based on the content entered

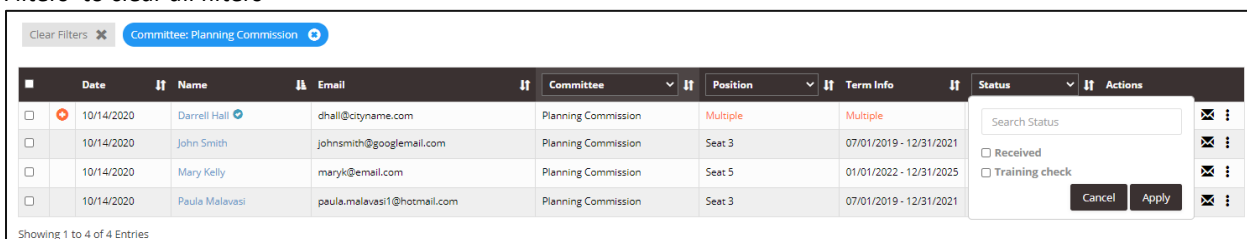


The screenshot shows the 'APPLICANTS' tab with a search bar at the top right containing the text 'da'. Below the search bar is a checkbox for 'Also Show Expired Applicants' and a 'Group Actions' dropdown. The table below has columns: Date, Name, Email, Committee, Position, Term Info, Status, and Actions. Two entries are visible, both filtered by the search term.









	Date	Name	Email	Committee	Position	Term Info	Status	Actions
<input type="checkbox"/>	10/14/2020	Darrell Hall	dhall@cityname.com	Planning Commission	Multiple	Multiple	Received	 
<input type="checkbox"/>	10/14/2020	David Suttle	dsuttle@myemail.com	Finance Committee	Seat 3	01/02/2022 - 01/01/2024	Received	  

Showing 1 to 2 of 2 Entries (filtered from 18 total entries)

- The Committee, Position, and Status columns can be filtered by selecting the dropdown menu available in the column title and selecting the required entries to filter by. Filters applied will be shown at the top of the table and can be removed by selecting the 'x' on the filter to clear an individual filter or selecting 'Clear Filters' to clear all filters





The screenshot shows the 'APPLICANTS' tab with filters applied to the Committee, Position, and Status columns. The filters are: Committee: Planning Commission, Position: Multiple, and Status: Received. The table below shows 4 entries filtered by these criteria.

	Date	Name	Email	Committee	Position	Term Info	Status	Actions
<input type="checkbox"/>	10/14/2020	Darrell Hall	dhall@cityname.com	Planning Commission	Multiple	Multiple	Received	 
<input type="checkbox"/>	10/14/2020	John Smith	johnsmith@googlemail.com	Planning Commission	Seat 3	07/01/2019 - 12/31/2021	Received	 
<input type="checkbox"/>	10/14/2020	Mary Kelly	maryk@email.com	Planning Commission	Seat 5	01/01/2022 - 12/31/2025	Received	 
<input type="checkbox"/>	10/14/2020	Paula Melavasi	paula.melavasi1@hotmail.com	Planning Commission	Seat 3	07/01/2019 - 12/31/2021	Received	 

Showing 1 to 4 of 4 Entries

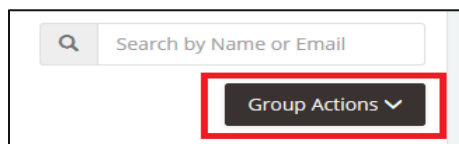
Individual Actions

Each entry on the table has a number of options available:

- Send Email – opens a blank email dialog with the users email address pre-populated in the 'To' field
- Recommend Position - allows the user to send an email to any email address, recommending a particular term of a position to them. Where the position is advertised, a link to the relevant form for applications will also be provided
- Assign Training - opens a new email, pre-populated with details on the training that the relevant user needs to complete
-  – View Workflow Task – This option will only appear if you are assigned the current workflow task or have permission to access tasks not assigned to you. This option will open the direct workflow task, if there is a single workflow task, or will load the list of all workflow tasks, if there are multiple current workflow tasks
-  – Route Application – This option will only appear if you are assigned the current workflow task or have permission to route tasks not assigned to you. On selecting this option, a list of available workflow steps will be presented. Select the required route to move the application through the workflow. Depending on the workflow configuration you may be presented with additional dialog to confirm/provide content prior to completing this step

Group Actions

Multiple members can be selected on the table to use the 'Group Actions'



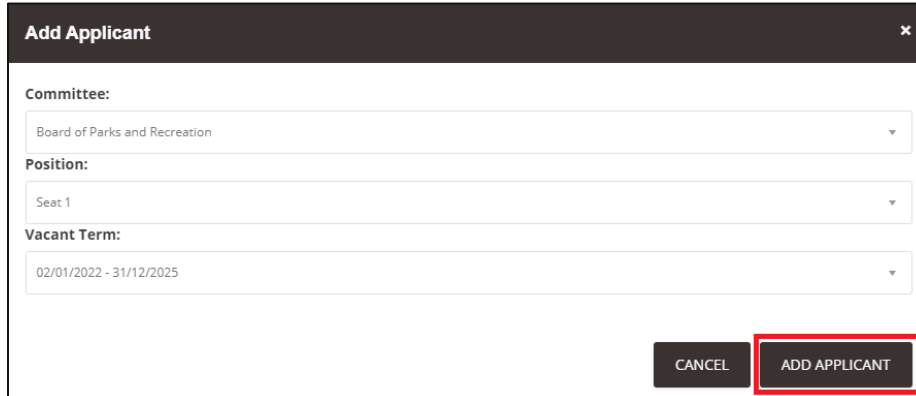
The screenshot shows the 'APPLICANTS' tab with a search bar at the top left containing the text 'Search by Name or Email'. Below the search bar is a 'Group Actions' dropdown menu, which is highlighted with a red box.

All actions available here function the same as for individual entries, but all selected applicant email addresses appear in the 'Send To' field for the email

Add Applicant

The 'Add Applicant' option provides quick and easy access to add a new application

1. Select 'Add Applicant +'
2. Populate the fields in the dialog and select 'Add Applicant'



Add Applicant ×

Committee:
Board of Parks and Recreation ▼

Position:
Seat 1 ▼

Vacant Term:
02/01/2022 - 31/12/2025 ▼

CANCEL ADD APPLICANT

3. The related form for the application will open in a new tab for submission

Dashboard & Reports

The Dashboard & Reports area provide overview and reporting information help provide content to aid in managing the positions and their related detailed data.

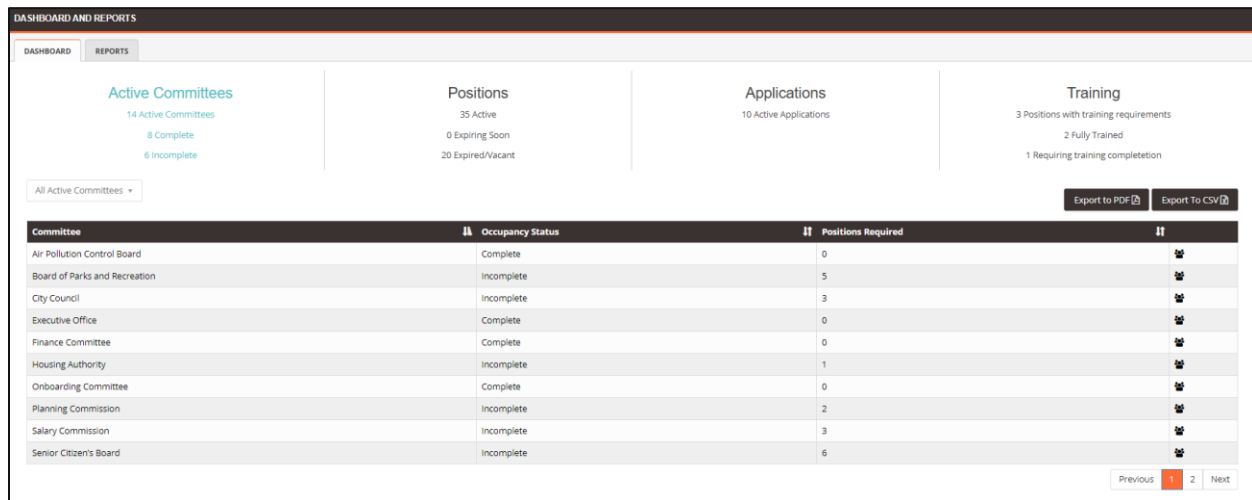
Access to the Dashboard & Report area is controlled by a single permission. Users with the required permissions will be able to generate all reports across all Committees.

Dashboards

Dashboards provide an at-a-glance view of key information related to your Committees. Key pieces can be drilled into as needed

The dashboards available are Active Committees, Positions, Applications and Training. Details on each dashboard is below.

Active Committees



Information shown is

1. Total Number of Committees active in the system
2. Total Number of Committees active in the system with ALL active terms filled, based on today's date
3. Total Number of Committees active in the system with ANY active terms unfilled, based on today's date

When this dashboard is selected, the table on the second half of the screen will show a list of all active Committees.

Information show in the second half of the screen is:

- Committee Name
- Occupancy Status – Complete if ALL active terms are filled at today's today, Incomplete if not
- Positions Required – a count of all positions with unfilled terms at today's date

The list of Committees can be filtered to view all, view complete (all positions filled) or view incomplete (some positions vacant). The filtered list can be exported to PDF or CSV.

An individual Committee details can be opened from here by selecting 🗨 on the right.

Positions

DASHBOARD AND REPORTS

DASHBOARDREPORTS

Active Committees

3 Active Committees

1 Complete

2 Incomplete

Positions

20 Active

1 Expiring Soon

9 Expired/Vacant

Applications

9 Active Applications

Training

12 Positions with training requirements

4 Fully Trained

8 Requiring training completion

All Positions

Export to PDFExport To CSV

Committee	Position	Status	Person	End Date	
Arts Council	Chair	Vacant		No previous term	
Arts Council	Seat One	Active	Aayushi a Singhal	12/31/2021	
Arts Council	Seat Two	Active	Alexandre Cardoso	12/31/2020	
Arts Council	Seat Three	Expired		11/04/2020	
Arts Council	Seat Four	Vacant		10/21/2020	
Arts Council	Seat Five	Expired		10/31/2020	
Arts Council	Seat Six	Active	Nico Sullivan	08/31/2021	
Arts Council	Seat Seven	Expired		10/31/2020	
Arts Council	Seat Eight	Active	Larry Dolan	01/31/2022	
Board of Parks and Recreation	Pos1	Active	Alex Malavasi	07/22/2021	

Previous12Next

Information shown is:

1. Total Number of active positions in all active Committees in the system
2. Total Number of positions where the current term is expiring in the next 14 days
3. Total Number of positions where the current term is expired/vacant already

When this dashboard is selected, the table on the second half of the screen will show a list of all current positions, with details on the current term for that position.

Information show in the second half of the screen is:

- Committee Name
- Position Name – selecting this link will open position history details
- Position Status:
 - Active – currently filled, not due to expire in the next 14 days
 - Expiring Soon – currently filled, due to expire in the next 14 days
 - Expired – previous term ended, current term is unassigned
 - Vacant – previous term was vacated, current term is unassigned
- Member currently in this position, where a member is assigned – selecting this link will open the user profile dialog
- End date for current term (end date of previous term if status is expired or vacant)

The list of positions can be filtered based on status. The filtered list can be exported to PDF or CSV.

An individual Committee details can be opened from here by selecting on the right.

Applications

DASHBOARD AND REPORTS

DASHBOARD

REPORTS

Active Committees

3 Active Committees

1 Complete

2 Incomplete

Positions

20 Active

1 Expiring Soon

9 Expired/Vacant

Applications

9 Active Applications

Training

12 Positions with training requirements

4 Fully Trained

8 Requiring training completion

All Applications

Export to PDF

Export To CSV

Name	Committee	Position	Date	Application Status	
Alexandre Cardoso	Board of Parks and Recreation	Seat Four	09/30/2021	Received	
	Board of Parks and Recreation	Seat Four	09/30/2021	Received	
	Board of Parks and Recreation	Seat Four	09/30/2021	Received	
Alexandre Malavasi	Board of Parks and Recreation	Seat Two	07/22/2021	Training check	
Paula Malavasi	Board of Parks and Recreation	Seat Four	09/30/2027	Received	
Alex Jones	Multiple	Seat Two	Multiple	Multiple	
	Board of Parks and Recreation	Seat Two	07/22/2021	Interview Scheduled	
	Arts Council	Seat Two	12/31/2026	Received	
Antonia Soto	Board of Parks and Recreation	Seat Five	12/31/2029	Received	
Paul Jones	Arts Council	Seat Two	12/31/2026	Received	
Thomas Kelly	Board of Parks and Recreation	Seat Seven	09/30/2021	Received	

Previous

1

Next

Information shown is:

- Total Number of Applications active in the system

When this dashboard is selected, the table on the second half of the screen will show a list of all active applications

Information show in the second half of the screen is:

- Applicant name – selecting this link will open the user profile dialog, also expands for multiple entries per member
- Committee application is for
- Position application is for – selecting this link will open position history details
- Application date
- Application status

List of Applications can be filtered to view all, or view by application status. The filtered list can be exported to PDF or CSV.

Tasks related to the application can be viewed by selecting the on the right.

Training

DASHBOARD AND REPORTS

DASHBOARD

REPORTS

Active Committees

3 Active Committees

1 Complete

2 Incomplete

Positions

20 Active

1 Expiring Soon

9 Expired/Vacant

Applications

9 Active Applications

Training

12 Positions with training requirements

4 Fully Trained

8 Requiring training completion

View All

Export to PDF

Export To CSV

Name	Committee	Position	Training Title	Expiration Date	
Aayushi a Singhal	Multiple	Multiple	Multiple	Multiple	
	Arts Council	Seat One	Health and Safety	10/15/2022	
	Board of Parks and Recreation	Seat Two	Agile	11/01/2020	
	Board of Parks and Recreation	Seat Two	Functional	04/15/2021	
	Board of Parks and Recreation	Seat Two	Manual Handling Level 2	12/15/2022	
	Board of Parks and Recreation	Seat Two	HR Basics	10/15/2022	
Alex Malavasi	Board of Parks and Recreation	Seat One	Multiple	Multiple	
Alexandre Cardoso	Arts Council	Seat Two	HR Basics	10/06/2022	
Nicole Sullivan	Board of Parks and Recreation	Seat Five	Multiple	Multiple	

Previous 1 Next

Information shown is:

- Total number of active positions where one or more training requirement has been stored
- Total number of current and future terms where the user assigned to the term has the required training recorded and valid (by date range for the term)
- Total number of current and future terms where the user assigned to the term does not have the required training recorded and valid (by date range for the term)

When this dashboard is selected, the table on the second half of the screen will show a list of all terms and members, with details on the training requirements

Information show in the second half of the screen is:

- Member assigned to the term – selecting this link will open the user profile dialog, also expands for multiple entries per member
- Committee Name
- Position Name – selecting this link will open position history details
- Training requirement for the position
- Expiration date for training (where available)

List of Positions can be filtered to view all or view training required only. The filtered list can be exported to PDF or CSV.

An individual Committee details can be opened from here by selecting on the right.

Reports

To generate a report:

1. Select the required reports from the drop down
2. Select any required filters
3. Select 'Generate'
4. For onscreen reports, the report will be generated and will display onscreen
For document report, the report will generate in the background and you will receive an email when the report has been generated

Reports available are Expiring Seats, Expiring Training, Local Appointments List (commonly referred to as the Maddy Report in some districts) and the Vacancy Report. Details on each report is below.

Expiring Seats

An onscreen report displaying information on all positions that are empty on the start date provided and on all positions that are due to end within the date range provided

Information Displayed:

- Committee
- Position
- Term Start
- Term End
- Current Member Name - member in the current term by start date provided, blank if term is unassigned
- Succeeding term (next term for the position), values can be one of:
 - Name of member assigned - if member is assigned to term
 - Advertised - if no member assigned but position term is advertised
 - Not Advertised - if no member is assigned and position term is not advertised

Additional Features:

- Filters can be applied prior to running the report
 - Committee – defaults to select all active committee but can be filtered to omit specific committees if required
 - Time Frame – select for expiring in 30/60/90 days or provide a custom date range for checking
- All result columns can be sorted and filtered
- Export to PDF, retaining any filters applied
- Export to Excel, retaining any filters applied
- Extended export to Excel, to include all user fields (email, address, etc.) for all entries – for use in mail merge or other purposes

Expiring Training

An onscreen report displaying information on all positions that have a training requirement where the member currently assigned to the position does not have valid training certification for their term

Information Displayed:

- Member
- Training Type
- Committee
- Position
- Term Start
- Term End
- Training Expiration Date

Additional Features:

- Filters can be applied prior to running the report
 - Committee – defaults to select all active committee but can be filtered to omit specific committees if required
- All result columns can be sorted and filtered
- Export to PDF, retaining any filters applied
- Export to Excel, retaining any filters applied
- Extended export to Excel, to include all user fields (email, address, etc.) for all entries – for use in mail merge or other purposes

Local Appointments List

A document report showing information for each position within all Committees. Specified position and member information is displayed for every valid term in each position within the date range provided. If multiple terms exist within a position within the date range provided, an entry per term will appear in the report

A configurable template is provided to capture:

- Report cover page content
- Introductory content displayed per Committee, based on static text and committee information stored within the system
- Content to display per term, including options to include:
 - Positions details – training requirements, term length, nominating/appointing entities
 - Term details – start date, end date, current member server
 - Term status – filled / vacant / expired

Additional Features:

- Filters can be applied prior to running the report
 - Committee – defaults to select all active committee but can be filtered to omit specific committees if required
 - Time Frame – to provide a custom date range for checking, defaults to be from today to the end of the year
- Report will be generated in the background and you will receive an email when it is complete
- Recently run reports remain accessible for download

Vacancy Report

A document report showing vacancy information for Committee. Information is divided into 'Current Vacancies' (positions that are empty today) and 'Upcoming Vacancies' (positions that will become vacant within the date range provided)

A configurable template is provided to capture:

- Report cover page content
- Introductory content displayed per Committee, based on static text and committee information stored within the system
- Content to display per position, including options to include:
 - Positions details – training requirements, term length, nominating/appointing entities
 - Term details – start date, end date, current member server

Additional Features:

- Filters can be applied prior to running the report
 - Committee – defaults to select all active committee but can be filtered to omit specific committees if required
 - Time Frame – select for vacant in the next 30/60/90 days
- Report will be generated in the background and you will receive an email when it is complete
- Recently run reports remain accessible for download

Public Committee Portal

The Public Committee Portal contains public facing pages to provide information on each Committee to the public. As of version 20.6.3, the new public committee portal is available at the following URL – <https://cityname.primegov.com/public/committees>. For sites where the portal is currently embedded via an iframe – the new portal can be accessed using <https://cityname.primegov.com/public/committees?fromiframe=true>

If you wish to view the meetings list of just a specific Committee, the URL <https://cityname.primegov.com/public/committees?committee=3> can be used, where the Committee ID from PrimeGov is added to filter as needed.

Note: Committee filters are not available in this view as it is pre-filtered for the selected Committee.

Your PrimeGov product and websites can be updated to access this URL, please contact your PrimeGov Support contact to arrange this. The Support Team can provide you with the details to update any embedded pages on your own sites and can also update the internal short-cut within the main product.

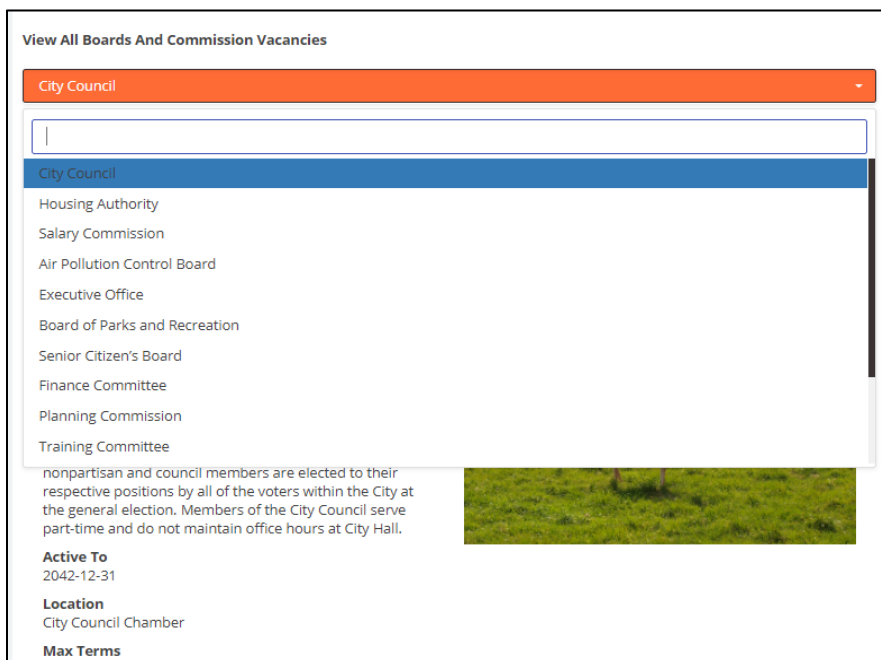
Committee List

On initial load, a list of available Boards and Commissions will appear. The list is ordered based on pinned Committees within the main product and the first entry in the list will be selected by default. Committees can be disabled to hide from this view. Select any Board or Commission from this list to load the details on the right.

This list can be filtered by typing in the filter field at the top of the list.



When the width of the page does not allow for display of this list alongside the Committee information, the list of Boards and Commissions will switch to appear as a drop down above the Committee information. Select the drop down to change the Committee displayed.



Profile

View All Boards And Commission Vacancies

Boards And Commissions

Filter

City Council

Housing Authority

Salary Commission

Air Pollution Control Board

Executive Office

Board of Parks and Recreation

Senior Citizen's Board

Finance Committee

Planning Commission

Training Committee

Onboarding Committee

Templates Committee

Transportation Authority

PROFILEMEMBERSVACANCIES

City Council

Type
City Council

The City operates under the council-manager form of government, with a seven-member council elected to four-year terms. There are four district positions and three at-large positions. For more information regarding City Council Districts, [click here](#). The council adopts ordinances, sets the annual budget, and directs the City through the city manager.


The mayor serves a two-year term and is elected to the position by the council. The City Council positions are nonpartisan and council members are elected to their respective positions by all of the voters within the City at the general election. Members of the City Council serve part-time and do not maintain office hours at City Hall.

Active To
2042-12-31

Location
City Council Chamber

Max Terms
2

Liaison
Alexandre Cardoso



The profile tab is displayed when a new Committee is selected to view. This tab contains the information entered in the main product for the Committee. Fields that are displayed here are controlled in the Committee Manager admin area, see Manage Committee Fields below.

Only fields with data will appear, if a field is enabled to show but contains no data for the selected Committee, it will not display here.

Members

PROFILEMEMBERSVACANCIESMEETINGS

City Council members:

Xur Gar
Position 1, Mayor
xur.gar@cityname.com

Nici Sullivan
Position 2, Deputy Mayor
nicola.higgins@cityname.com

Orla Healy
Position 3, Member
orla.healy@cityname.com


Aayushi Singhal
Position 4, Member
aayushi.singhal@cityname.com

Larry Dolan
Position Five, Member
larry.dolan@cityname.com

The member tab displays information on the membership of each filled position based on today's date. The position name and sub-title are always shown. Additional membership details will show based on contact details enabled for the user profile public display. Member profile pictures can be enabled to show in this view, speak with your PrimeGov representative to enable this for selected Committees.

Select a member to view the members details.

← Back



Name

Nici Sullivan

Position

Accounting Supervisor

Department

Communications

Bio

Nici was born and raised in this town and has been happily serving the members of district 45 for over 8 years.

Email

nicola.higgins@primegov.com

Phone

123-456-789


District

45

Position History

Committee	Position	Term Start	Term End
Board of Parks and Recreation	Seat Five	01/01/2019	12/31/2019

Attendance



100%

0 meetings missed out of 27

Voting

Nici Sullivan For	32
Majority For	31
Nici Sullivan Against	4
Majority Against	4

Content shown here can be adjusted:

- Individual member fields that are displayed here are controlled in the Committee Manager admin area, see Manage User Fields below
- Position History, Attendance and Vote History can be enabled/disabled in the portal config, speak with your PrimeGov representative to adjust this.

Vacancies

Profile

Members

Vacancies

Documents

Apply for membership

Planning Commission vacancies:

Position	Start Date	End Date	Status	Actions
Position 3	07/01/2019	12/31/2021	Current	Apply
Position 5	01/01/2022	12/31/2025	Upcoming	Apply

Previous

1

Next

The vacancy tab shows all advertised vacant terms for the selected Committee. Information shown here is:

- Position Name
- Term Start Date (or 'To be confirmed' when a position is advertised without a specific term)
- Term End Date (or 'To be confirmed' when a position is advertised without a specific term)
- Status – Current if the term is valid on today's date, Upcoming if the term is valid after today's date


Public users can select 'Apply' from here to access and submit the form associated with this vacancy.






In addition, the option to apply the Committee in general, without specifying a position or term details, can be enabled to display on the top right for individual Committees. This button will show regardless of which tab is selected for the Committee. Position and term details for applications of this type are provided later in the approval workflow, prior to adding a successful applicant to the position.

Meetings

[PROFILE](#) [MEMBERS](#) [VACANCIES](#) [MEETINGS](#)

Current And Upcoming Meetings

















Meeting Title	Date/Time	Documents	Options
Boards of Parks and Recr...	Nov 24, 2020 12:00 PM	 HTML Agenda  Agenda 	 
Boards of Parks and Recr...	Dec 29, 2020 12:00 PM		

Showing 1 to 2 of 2 Entries

Archived Meetings

[2020](#) [2019](#) [2018](#) [2017](#) [2016](#) [2015](#) [2014](#) [2013](#) [2012](#) [2011](#) [2010](#)

Meeting Title	Date/Time	Documents	Video
Boards of Parks and Recreati...	Oct 28, 2020 11:00 AM	 HTML Agenda  Agenda 	
Boards of Parks and Recreati...	Sep 22, 2020 12:00 PM	 HTML Agenda  Agenda 	
Boards of Parks and Recreati...	Aug 25, 2020 12:00 PM	 Notice of Cancellation	
Boards of Parks and Recreati...	Jul 28, 2020 12:00 PM	 HTML Agenda  Agenda 	
Boards of Parks and Recreati...	Jun 30, 2020 12:00 PM	 Notice of Cancellation	

Show Entries

Previous [1](#) [2](#) Next

Showing 1 to 5 of 8 Entries

The meetings tab provides a view of current and upcoming meeting and of archived meetings, allows at a glance meeting details and access to published meeting documents and videos.





This tab can be hidden if you are not using the PrimeGov Meeting Management features.

Documents

When one or more documents are set to show in the Boards and Commissions portal for the selected Committee, a Documents tab will be shown

[Profile](#) [Members](#) [Vacancies](#) [Documents](#) [Apply for membership](#)

Planning Commission Documents:

Title	Description	Actions
Annual Report 2019	Annual Report 2019	 
Committee Charter	This charter contains details on the rules and regulations set forth for the Planning Commission	 

Previous [1](#) Next

Document details as well as the option to view the document in the browser or download the document are provided. Only a PDF version of the document can be downloaded from the portal

View All Boards and Commission Vacancies

At the top of the main portal page is a link to view all Boards and Commissions vacancies.

Back to Boards and Commissions

Committee	Position	Start Date	End Date	Status	
Arts Council	Chair	01/01/2020	12/31/2020	Current	Apply
Board of Parks and Recreation	Seat Seven	10/01/2020	09/30/2021	Current	Apply
Board of Parks and Recreation	Seat Four	10/01/2020	09/30/2021	Current	Apply
Board of Parks and Recreation	Seat Nine	11/10/2020	10/20/2021	Current	Apply
Arts Council	Seat Two	01/01/2021	12/31/2026	Upcoming	Apply
Arts Council	Chair	01/01/2021	12/31/2026	Upcoming	Apply
Board of Parks and Recreation	Seat Four	10/01/2021	09/30/2023	Upcoming	Apply
Board of Parks and Recreation	Seat Seven	10/01/2021	09/30/2023	Upcoming	Apply
Board of Parks and Recreation	Seat Four	10/01/2025	09/30/2027	Upcoming	Apply
Board of Parks and Recreation	Seat Four	10/01/2027	09/30/2029	Upcoming	Apply

Previous 1 Next

This loads a new page showing all advertised terms for all Committees. As this list of vacancies has the potential to be a large list, we have provided filters across each column. Information shown here is:

- Committee
- Position Name
- Term Start Date (or 'To be confirmed' when a position is advertised without a specific term)
- Term End Date (or 'To be confirmed' when a position is advertised without a specific term)
- Status – Current is the term is valid on today's date, Upcoming if the term is valid after today's date

Public users can select 'Apply' from here to access and submit the form associated with this vacancy.

Users can return to the main page of the portal by selecting 'Back to Boards and Commissions'.

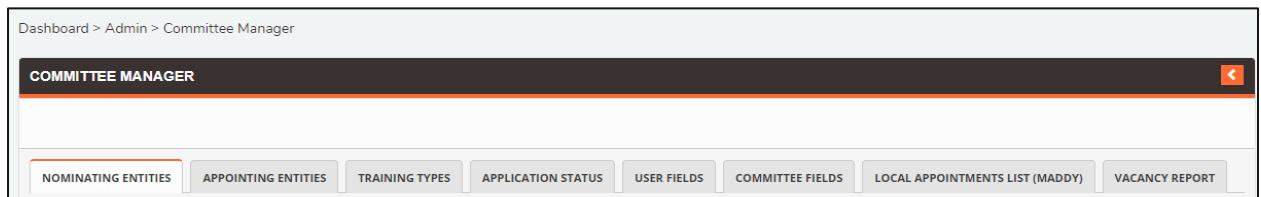
Committee Manager Administration

Multiple new admin supports have been added to help cater for set up and configuration for each client using Committee Manager. Options available include:

- Custom entries for appointing entity, nominating entity and training options
- Custom options for application status values, used in workflow configuration
- Management of user and committee fields – including the ability to add custom fields for users and committees, and controls to enable/disable these fields for public portal use
- Management of templates for reports to allow a greater freedom in report format for document-based reports

To access the administration area for Committee Manager:

1. Navigate to Admin -> System Administration -> Committee Manager
2. You will be brought to the Committee Manager admin area and presented with a number of tabs, each detailed below

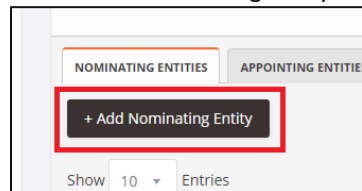


Manage Nominating Entities

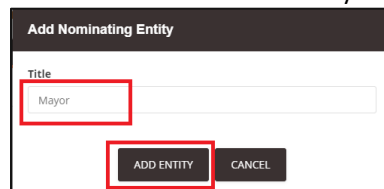
This area is used to provide the options that will be available for selection in the 'Nominating Entity' field when managing positions in the Committee.

1. From the Committee Manager Admin area select the 'Nominating Entities' tab
2. You will be presented with the list of existing nominating entity values
3. To add a new entry:



- a. Select 'Add Nominating Entity'



- b. Enter the title for the new entry and select 'Add Entity'



- c. New entry is added to the list

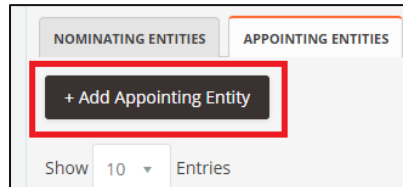
4. To edit an existing entry, select the edit icon, 
5. To delete an existing entry, select the delete icon, 

Manage Appointing Entities

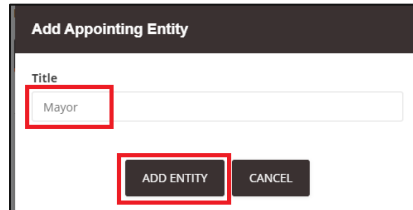
This area is used to provide the options that will be available for selection in the 'Appointing Entity' field when managing positions in the Committee.

1. From the Committee Manager Admin area select the 'Appointing Entities' tab
2. You will be presented with the list of existing appointing entity values



3. To add a new entry:
 - a. Select 'Add Appointing Entity'



- b. Enter the title for the new entry and select 'Add Entity'



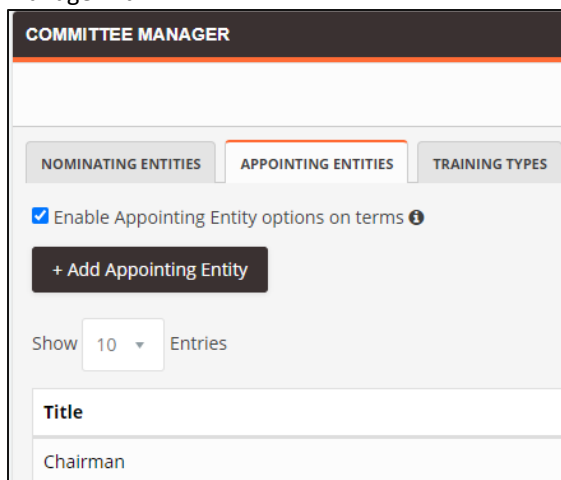
- c. New entry is added to the list

4. To edit an existing entry, select the edit icon, 
5. To delete an existing entry, select the delete icon, 

Allow Appointing Entity Options On Terms

Some cities have a requirement to store the appointing entity within the term itself, and not just at the position level. To allow the 'Appointing Entity' field to be stored within each term:

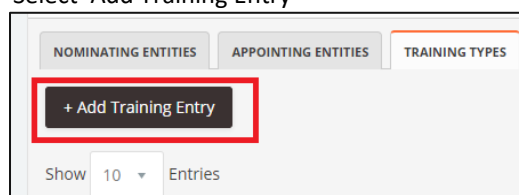
1. Enable 'Enable Appointing Entity options on terms' option in the Appointing Entities tab in Committee Manager Admin



Manage Training Types

This area is used to provide the options that will be available for selection when adding training requirements to positions and when adding training completed for users.

1. From the Committee Manager Admin area select the 'Training Types' tab
2. You will be presented with the list of existing training values
3. To add a new entry:
 - a. Select 'Add Training Entry'



- b. Enter the training type and training title for the new entry and select 'Add Training'

- i. An optional validity period in years and months can be added. This period will be used to calculate any training certification expiration when adding a training entry to a user. If left blank no expiration will be calculated



Add Training Entry

Training Type
Manual Handling

Training Title
Manual Handling Level 2

Validity Period
2 Years 6 Months

ADD TRAINING CANCEL



- c. New entry is added to the list
4. To edit an existing entry, select the edit icon, 
 5. To delete an existing entry, select the delete icon, 

Manage Application Status

This area provides values for the workflow configuration to use when setting the status of applications as they move through the workflow steps. Values are read from here when configuring workflow steps. The status of an application is then updated as it moves through the workflow and is displayed on the applicants' board.

1. From the Committee Manager Admin area select the 'Application Status' tab
2. You will be presented with the list of existing application status values
3. To add a new entry:
 - a. Select 'Add Application Status'

- b. Enter the title for the new entry and select 'Add Status'

- c. New entry is added to the list
4. To edit an existing entry, select the edit icon, 
5. To delete an existing entry, select the delete icon, 

Manage User Fields

The manage user fields area has two primary tasks:

- Allows you to add custom fields to the user profile. These fields will be available for all population in all users
- Allows you to manage which user fields appear on the internal user profile, in members and applicants and on the public portal
 - Internal user profile - A user profile view is available from the member and applicant's area and from the manage positions area
 - Portal - A profile view is available from the public pages for any member on a Committee

Add New User Custom Field

1. Select 'Add Custom Field'
2. Select 'New' to create a new custom field or 'Existing' to select an existing custom field that you want to associate with users

If creating a new custom field:

- a. Populate the fields
 - i. Name (required) – a system name for the custom field. This name will be used in workflow, forms and other locations within the system to refer to this custom field. Names can only contain letter, numbers, periods and underscores
 - ii. Label Text (required) – the text that will appear in the user profile and the public portal as a label for this field
 - iii. Help Text – this text is used in locations where a tooltip is provided for the field
 - iv. Field Type, one of:
 1. Rich Text – full editor capabilities, allows for formatting and richer content
 2. Text – plain unformatted text, provides three additional fields to optionally specify
 - a. Placeholder – sets placeholder text for the field
 - b. Min Length – sets a minimum length required to save a value to the field
 - c. Max Length – sets a maximum length limit to save a value to the field
 3. Select – provides a set of values for selection. Options for the selection can be provided in this dialog when 'Select' type is entered.

To add a new option, select the add icon ; to edit an existing entry, select the edit icon ; and to remove an existing entry, select the delete icon .




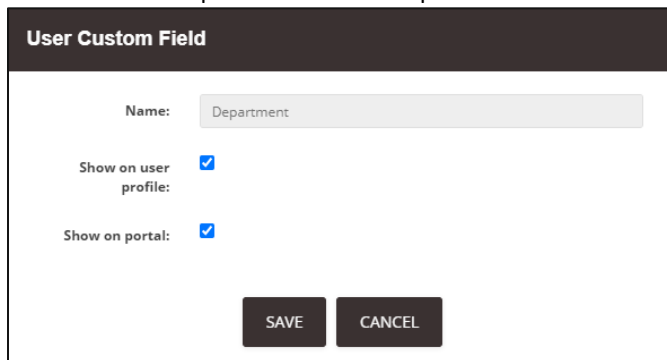
The screenshot shows a box titled 'Options' with a plus icon in the top right corner. Inside the box, there are two entries: 'Option 1' and 'Option 2'. To the right of each entry are two small icons: a pencil (edit) and a trash can (delete).

- v. Required – determines if the user information can be saved from the user profile without providing a valid value for this field
 - vi. Show on internal member profile – select this option to show this field in internal user profile
 - vii. Show on public member profile – select this option to show this field in the user profile on the public portal
 - b. Select 'Save'
- If using an existing custom field:
- a. Select the existing field from the 'Custom Field' drop down
 - b. Select 'Save'
3. The new custom field will appear in the list of 'Custom User Fields'

Manage Default User Fields

Default system fields are displayed here to provide controls to show/hide these fields on the user profile and on the portal. Default system fields cannot be re-arranged to adjust their order of appearance.

1. Select the edit icon 
2. Turn each option for user profile or portal on or off as required
 - a. Show on user profile – select this option to show this field in internal user profile
 - b. Show on portal – select this option to show this field in the user profile on the public portal






The screenshot shows a form titled 'User Custom Field'. It has a 'Name:' label followed by a text input field containing 'Department'. Below this, there are two checkboxes: 'Show on user profile:' which is checked, and 'Show on portal:' which is also checked. At the bottom of the form are two buttons: 'SAVE' and 'CANCEL'.

3. Select 'Save'

Manage Custom User Fields

Custom fields can be updated after initial creation and can be reordered to adjust the order the fields appear on the user profile and public portal.

1. To reorder a custom user field, which will control the order they appear on the internal user profile and on the portal – select the reorder icon  and drag the field to the required location
2. To edit a custom user field, select the edit icon . All fields provided when creating the custom field are presented. Name and field type cannot be edited after initial creation, all others can be updated as needed. Select 'Save' when complete.
3. To delete a custom user field, select the delete icon  and confirm your deletion

Manage Committee Fields

The manage committee fields area has two primary tasks:




- Allows you to add custom fields to the committee profile. These fields will be available for all population in all committees
- Allows you to manage which committee fields appear on the public portal for the Committees

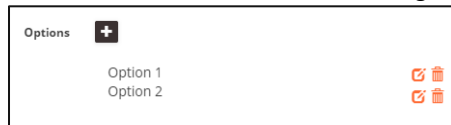
Add New Committee Custom Field

1. Select 'Add Custom Field'
2. Select 'New' to create a new custom field or 'Existing' to select an existing custom field that you want to associate with users

If creating a new custom field:

- a. Populate the fields
 - i. Name (required) – a system name for the custom field. This name will be used in workflow, forms and other locations within the system to refer to this custom field. Names can only contain letter, numbers, periods and underscores
 - ii. Label Text (required) – the text that will appear in the user profile and the public portal as a label for this field
 - iii. Help Text – this text is used in locations where a tooltip is provided for the field
 - iv. Field Type, one of:
 1. Rich Text – full editor capabilities, allows for formatting and richer content
 2. Text – plain unformatted text, provides three additional fields to optionally specify
 - a. Placeholder – sets placeholder text for the field
 - b. Min Length – sets a minimum length required to save a value to the field
 - c. Max Length – sets a maximum length limit to save a value to the field
 3. Select – provides a set of values for selection. Options for the selection can be provided in this dialog when 'Select' type is entered.

To add a new option, select the add icon ; to edit an existing entry, select the edit icon ; and to remove an existing entry, select the delete icon 



- v. Required – determines if the user information can be saved from the user profile without providing a valid value for this field
- vi. Show on public committee profile – select this option to show this field in the committee profile on the public portal


- b. Select 'Save'

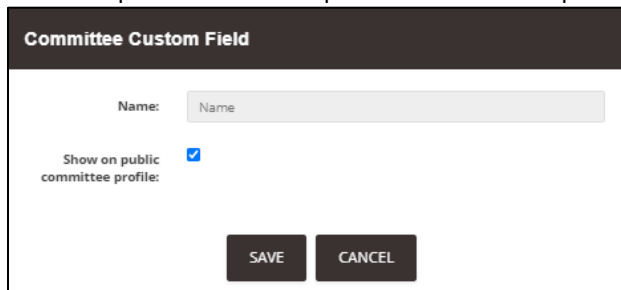
If using an existing custom field:

- c. Select the existing field from the 'Custom Field' drop down
 - d. Select 'Save'
3. The new custom field will appear in the list of 'Custom Committee Fields'

Manage Default Committee Fields

Default system fields are displayed here to provide controls to show/hide these fields on the public portal. Default system fields cannot be re-arranged to adjust their order of appearance.




1. Select the edit icon 
2. Turn the option for 'Show on portal' on or off as required



3. Select 'Save'

Manage Custom Committee Fields

Custom fields can be updated after initial creation and can be reordered to adjust the order the fields appear on the public portal.

1. To reorder a custom committee field, which will control the order they appear on the public portal – select the reorder icon  and drag the field to the required location
2. To edit a custom committee field, select the edit icon . All fields provided when creating the custom field are presented. Name and field type cannot be edited after initial creation, all others can be updated as needed. Select 'Save' when complete
3. To delete a custom committee field, select the delete icon  and confirm your deletion

Manage Report Templates

Two reports provided by the Committee Manager Reporting feature will produce a document. Contents and appearance of this document can be controlled in the 'Local Appointments List (Maddy)' and 'Vacancy Report' tabs of the Committee Manager Admin area.

Each report is broken into multiple portions, where each portion can be configured separately. These portions are used as the report is generated. Required static content and magic codes can be used, together with the options provided in the rich text editor, to configure the contents of this report per client.

New magic codes related to Committees, Positions and Terms have been added to support the generation of required contents in these reports.

A default report layout is provided with the product. If you wish to make adjustment to this provide templates:

1. Enter the required content, magic codes and formatting into each section of the template
2. Select 'Save' when complete to store the template content



Local Appointments List (Maddy)

A document report showing information for each position with all Committees. Specified position and member information is displayed for every valid term in each position within the date range provided.

The available areas for this template are:

- Report Cover Content – appears once per report. This content will be placed at the start of the report
- Committee Intro Content – appears once per Committee. This content will be placed at the start of each new Committee that appears in the report
- Position Header – appears following the Committee Intro Content, prior to the list of positions
- Position Content – appears once per relevant position/term in the report. This content will appear after the Committee Intro content, per position/term that meets the report criteria
- Report End Content – appears once per report. This content will be placed at the end of the report

Vacancy Report

A document report showing vacancy information for Committee. Information is divided into 'Current Vacancies' (positions that are empty today) and 'Upcoming Vacancies' (positions that will become vacant within the date range provided).

The available areas for this template are:

- Report Cover Content – appears once per report. This content will be placed at the start of the report
- Committee Intro Content – appears once per Committee. This content will be placed at the start of each new Committee that appears in the report
- Current Vacancies Header – appears once per Committee, following the Committee Intro Content. This text will be the header for the list of vacancies that are currently open
- Current Vacancies Content – appears for each vacancy that is open in the committee today
- Upcoming Vacancies Header – appears once per Committee, following the Current Vacancies Content. This text will be the header for the list of vacancies that will become vacant within the date range provided
- Upcoming Vacancies Content – appears for each vacancy that will become vacant in the date range provided
- Report End Content – appears once per report. This content will be placed at the end of the report

Magic Codes Available

Committee Magic Codes

All system fields that are available for a Committee are available as a magic code for selection, these are:

- Committee Name
- Committee Type
- Committee Description
- Committee Active From – includes support for date formatting options, see [FreshDesk](#)
- Committee Active To – includes support for date formatting options, see [FreshDesk](#)
- Committee Location
- Committee Max Terms
- Committee Liaison
- Committee Eligibility

Position Magic Codes

Most system fields that are available for a position are available as a magic code for selection, these are:

- Position Name
- Position Subtitle
- Position Type
- Position Nominating Entity
- Position Appointing Entity
- Position Initial Term Length
- Position Max Term Length
- Position Training – a list of all entries saved within the position
- Position Qualifications

Term Magic Codes

Most system fields that are available for a term are available as a magic code for selection, these are:

- Term Length – calculated from the start date to the end date provided for the term
- Term Start Date – includes support for date formatting options, see [FreshDesk](#)
- Term End Date – includes support for date formatting options, see [FreshDesk](#)
- Term Status, one of:
 - Filled – if the term has a member assigned
 - Vacant – if the term has no member assigned and the previous assigned member was marked as 'vacated' or if there has been no previous term where a member was assigned
 - Expired – if the term has no member assigned and the previous assigned member completed their term and was not marked as 'vacated'
- Term Member – if a member is assigned, the name can be entered in the report
- A number of magic codes relating to the previous term in the position:
 - Term Previous Start Date – includes support for date formatting option, see [FreshDesks](#)
 - Term Previous End Date – includes support for date formatting options, see [FreshDesk](#)
 - Term Previous Member – if a member is assigned to the previous term, the name can be entered in the report
- An additional new magic code to cater for instances in reports where the previous term name is used when the current term has no member assigned
 - Term Previous/Current Member – allows for flexibility in the report. If the relevant term has a member assigned the current member name will be included. If the current term does not have a member assigned, the previous term will be reviewed for a member to include. Population of other user fields in this portion of the report will also default to the values stored for the current or previous member when this field is used

Custom Field Magic Codes

All user and committee custom fields can be referenced in the reports by entering a magic code in the format `{{customfield.nameoffield}}`, where *nameoffield* is the name given to the custom field when creating it – custom field name must be in all lowercase to function correctly. These fields will be replaced with the relevant value on report generation.

Committee Level Applications

The product supports the ability to allow Committee level applications, applications where the public can apply to a Committee without specifying a position or term. This can be enabled in the preferences tab for each Committee.

In the admin area we provide the ability to set the form that is required for the general Committee level applications

The screenshot shows the 'COMMITTEE MANAGER' interface. At the top, there is a navigation bar with a back arrow. Below it is a row of tabs: NOMINATING ENTITIES, APPOINTING ENTITIES, TRAINING TYPES, APPLICATION STATUS, USER FIELDS, COMMITTEE FIELDS, LOCAL APPOINTMENTS LIST, VACANCY REPORT, and COMMITTEE APPLICATIONS (which is highlighted). The main content area is titled 'Multi-Committee Applications' and contains the following text: 'Applications for multiple committees from a single form are controlled here. To set preferences for specific committees go to [Committee Manager](#) and select the required committees.' Below this text is a dropdown menu labeled 'Select multi-committee application form:' with 'Board Application' selected. At the bottom, there are two links: 'Edit application form' and 'Create new application form'.

Permissions

A new of new permissions have been added to the system

- System Permissions -> Committee Manager – Provides permission to view the ‘Committee Manager’ option in System Administration
- System Permissions -> View Committee Manager Dashboard & Reports – Provides permission to view the ‘Dashboard & Reports’ area under Committee
- System Permissions -> View All Members & Applicants – A global permission to view Members & Applications for all Committees
- System Permissions -> Manage All Committee Documents – A global permission to manage Committee Documents for all Committees
- Committee Permissions -> View Members & Applicants – An individual Committee permission to view Members & Applicants for a single Committee
- Committee Permissions -> Manage Committee Documents – An individual Committee permission to manage the documents stored in the Committee

Existing Committee permissions were also updated to apply existing permission rules to new functionality in the Committee details and positions area:

- System Permissions -> View All Committees
- System Permissions -> Edit All Committees
- System Permissions -> Manage All Committee Positions
- Committee Permissions -> View Committee
- Committee Permissions -> Edit Committee
- Committee Permissions -> Manage Positions

Forms & Workflow Configuration

Forms

There were no changes to the current form functionality made during Committee Manager, however there are some minimum requirements for forms to use the Committee Manager functionality. The following needs to be provided by the form:

- Email address
- First Name
- Last Name
- Position ID

Workflow Configuration

A number of new options have been provided to support Committee Manager functionality:

Create Application From Form

One of the first required steps in any applicant processes within Committee Manager. This step takes the information from the form and creates an 'applicant' entry in the system. All information provided in the form is saved and the applicant profile will be populated with the details. Applicant entries are required for an applicant to show in the 'Applicants' tab within 'Members & Applicants'

- Inputs
 - Requires a form id to gather all information for the applicant
 - Form is required to provide an id for a term within a position
- Output
 - Related application entry is created within the system

The screenshot shows a 'Step Info' configuration window. It has a dark header with the text 'Step Info'. Below the header, there are several fields and sections:

- Name:** A text input field containing 'Create Applicant'.
- Type:** A dropdown menu with 'Create Application From Form' selected.
- Inputs:** A section header followed by two input fields:
 - Form:** A text input field containing 'variables.StartForm'.
 - Position Term:** A text input field containing 'variables.PositionTerm'.
- Outputs:** A section header followed by one output field:
 - Application:** A text input field containing 'variables.ApplicationId'.

Change Application Status

This step can be used multiple times as the application is moved through the workflow. The current status of any application can be viewed on the 'Members & Applicants' board, this step allows you to specify the status of any applications as it is updated on the workflow. Options available in this step are read from the 'Application Status' area in the Committee Manager Admin area.

- Inputs
 - Application ID for application to update
 - New status to set for the application
- Output
 - None

Step Info

Name

Received

Type

Change Application Status

Inputs

Application

variables.ApplicationId

Application Status

Received

Outputs

No outputs for this step.

Add Document to Application

As the application moves through the workflow, there will be a need to create one or more documents related to the application. Separate to the current 'Create Document From Form' which creates the document, the 'Add Document to Application' step allows you add these created documents to the application. These documents can be viewed from the user profile in the Members & Applicants area of the product.

- Inputs
 - Application ID for application to update
 - Reference for document to be added to the application
- Output
 - None

Step Info

Name

Add Document To Application

Type

Add Document to Application

Inputs

Application

variables.ApplicationId

Document

variables.Document

Outputs

No outputs for this step.

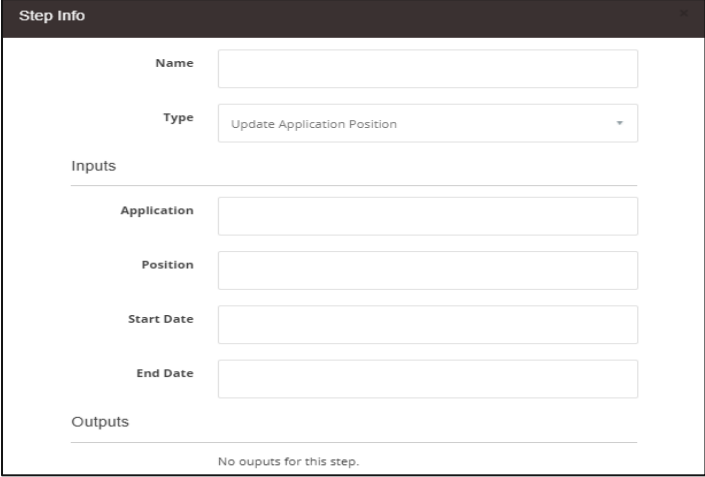
Update Application Position

This step is required to be in the workflow definition where an application is made the Committee or position level. This step allows the user to provide the final position and term date details for the selected applicant. This step can also be added to workflows where the position and term details are known from the application, but we wish to provide the option to update during the workflow.

When this step is selected the user will be prompted to provide position and term dates for the workflow. Some validation will be run to ensure that there is no current filled position within this date range. Workflow variables are updated as a result of this step. These variables are then used in the 'Add Member to Position' step.

Note: Dates provided in this dialog are used when adding a member to a position. If the term dates used overlap with any existing edited or advertised unfilled term, these terms will be removed and any advertised terms will no longer show on the public portal

- Inputs
 - Application ID for application to update
 - Position workflow variable to store the required position
 - Start Date workflow variable to store the required start date for the term
 - End Date workflow variable to store the required end date for the term
- Output
 - None



The 'Step Info' dialog box is used to configure a workflow step. It contains the following fields:

- Name:** A text input field.
- Type:** A dropdown menu currently set to 'Update Application Position'.
- Inputs:** A section containing four text input fields: 'Application', 'Position', 'Start Date', and 'End Date'.
- Outputs:** A section with the message 'No outputs for this step.'

Email Features

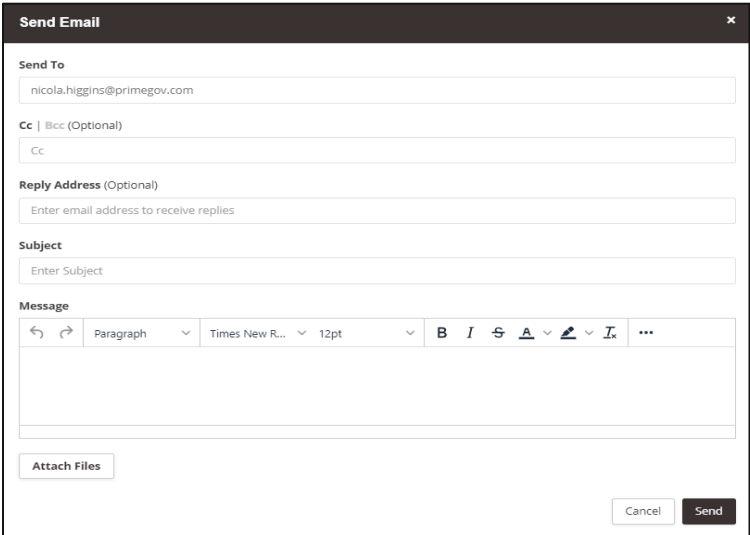
New email functionality has been added to support additional new features added within the application. Email automation is accessed in multiple locations across the application and supports three features – send email, recommend position, and assign training. In all cases, details of the email that has been sent is stored in the system audit log and can be retrieved if required.

Send Email

Opens the basic email dialog with the selected user(s) populated in the 'Send To' field.

The user can provide:

- Additional addresses in the 'Send To', CC or BCC fields
- Reply Address – optional field, allows the user to specify their own email address for the receiver to reply to. All emails sent from the system will come from the system email address.
- Subject
- Message content in a rich text editor
- Attach Files – allows the user to add attachments to the mail prior to sending



The 'Send Email' dialog box is used to compose and send an email. It contains the following fields and controls:

- Send To:** A text input field containing 'nicola.higgins@primegov.com'.
- Cc | Bcc (Optional):** A text input field containing 'Cc'.
- Reply Address (Optional):** A text input field with the placeholder 'Enter email address to receive replies'.
- Subject:** A text input field with the placeholder 'Enter Subject'.
- Message:** A rich text editor with a toolbar containing icons for undo, redo, paragraph style, font face, font size, bold, italic, strikethrough, text color, background color, and link. Below the toolbar is a large text area for the message content.
- Attach Files:** A button to add attachments.
- Buttons:** 'Cancel' and 'Send' buttons at the bottom right.

Recommend Position

Allows the user to select a Committee, Position and Term to recommend, then opens the system email dialog with the selected applicants email address populated in the 'Send To' field and pre-set text to recommend the position to the applicant, a link to the relevant form for applications will also be provided where available

Recommend Position

Committee:

Board of Parks and Recreation

Position:

Seat 1

Term:

02/01/2022 - 31/12/2025

CANCEL

NEXT

Assign Training

Allows the user to select the Training and required completion date, then opens the system email dialog with the selected applicants email address populated in the 'Send To' field and pre-set text to inform the applicant of their training requirement

Assign Training

Select Training

Health and Safety

Completion Date:

MM/DD/YYYY

CANCEL

NEXT