



# Using Team™ Committees

## Team™ Committees

To enhance the effectiveness of organization and communication within Team™, BlueStep™ has implemented a committee-formation feature. One, two or many committees may be created within any Team, expediting data sharing and collaboration. Committee memberships are also a particular timesaver by focusing and streamlining e-mail transactions between committee members.

A committee may be created by any member of the team. Team™ members may view the memberships of any committee, but the user who created the committee has the ability to add members of the team to his own committee or to remove them. Additionally, Team leads and organization administrators can add or remove team members on any committee within the team.

## Viewing Committees


All committees that have been created for your team will be listed on the Committees page, as seen below, accessed from the tan navigation bar. Each committee is listed by name along with any description that has been entered.

## Committees

[New Committee](#)


Name	Description	Members	Edit	Delete
2005 Planning Committee	Convention and travel			
Research Committee	Medical issues			
Management Committee	Management Staff			

If you are an admin, Team lead or the creator of the committee, you will see Edit and Delete icons. The edit icon opens the original creation screen, where you may change the name, description or membership of a committee. The delete icon removes the committee from the list and dissolves its membership without affecting Team membership or membership in other committees.

Any Team™ member may click the members icon  opposite a committee name to view a pop-up listing all members of that committee, as seen below.



## Creating a New Committee

To create a new committee, click the New Committee button  on the Committees page. On the resulting screen enter a name for the committee and a description, if desired.

## Committee - Marketing Committee

\* Required

### Name & Description

**Name** \*

**Description**

### Marketing Committee

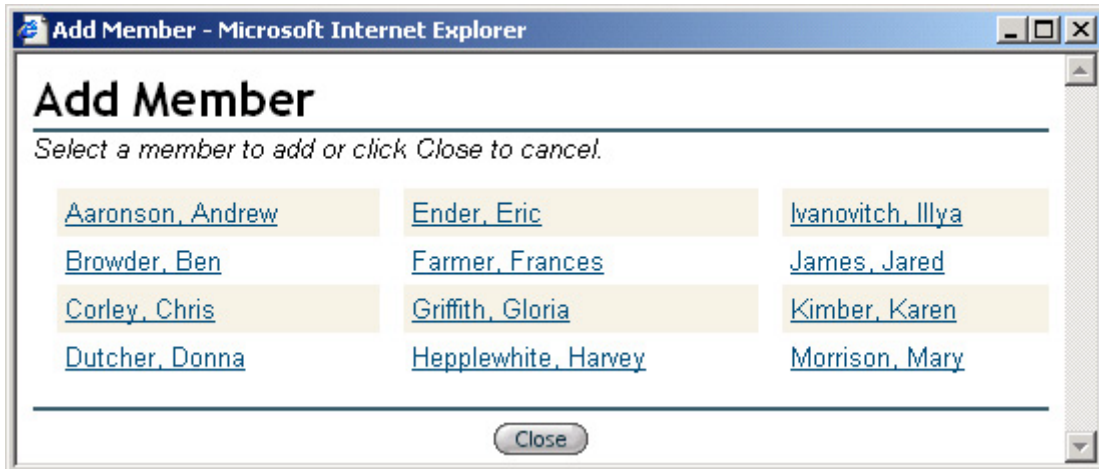
### Members


Name	Email	Remove
Aaronson, Andrew	<a href="mailto:nomail@bluestep.net">nomail@bluestep.net</a>	
Griffith, Gloria	<a href="mailto:noemail@bluestep.net">noemail@bluestep.net</a>	
Morrison, Mary	<a href="mailto:nomail@bluestep.net">nomail@bluestep.net</a>	
Ivanovitch, Illya	<a href="mailto:noemail@bluestep.net">noemail@bluestep.net</a>	
Hepplewhite, Harvey	<a href="mailto:noemail@bluestep.net">noemail@bluestep.net</a>	


\* Required

Click the Add Member button. The member selection pop-up contains the names of all Team™ members, example below. Click on the underlined member's name to add them to the committee. There is no restriction on the number of teams to which a member may belong.



Additionally, you may remove any single member from the committee by clicking the delete icon opposite his/her name (on the Committee screen). All members of the committee may be removed at once by clicking the Remove All Users button . This does not affect membership on other committees or within the Team.

When the committee is constituted as you would like, click the Save button  at the bottom of the screen.

## Sending Committee E-mails

The committee function streamlines e-mail transactions by allowing you to select as recipients the membership of an entire committee at once instead of selecting Team™ members individually. To take advantage of this feature, click the Send Team Email link on the tan navigation bar.

The screen is divided into three sections: Committees, Send To and Message Details. See example below.

## Send Team Email

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### Committees

- 2005 Planning Committee
- Research Committee
- Management Committee

### Send To:

*Select the team members to whom you wish to send this message.*

- |  |  |   |
|--|--|---|
| <input checked="" type="checkbox"/> <a href="#">Aaronson, Andrew</a> | <input type="checkbox"/> <a href="#">Ender, Eric</a>         | <input checked="" type="checkbox"/> <a href="#">Ivanovitch, Illya</a> |
| <input checked="" type="checkbox"/> <a href="#">Browder, Ben</a>     | <input type="checkbox"/> <a href="#">Farmer, Frances</a>     | <input checked="" type="checkbox"/> <a href="#">James, Jared</a>      |
| <input checked="" type="checkbox"/> <a href="#">Corley, Chris</a>    | <input type="checkbox"/> <a href="#">Griffith, Gloria</a>    | <input checked="" type="checkbox"/> <a href="#">Kimber, Karen</a>     |
| <input checked="" type="checkbox"/> <a href="#">Dutcher, Donna</a>   | <input type="checkbox"/> <a href="#">Hepplewhite, Harvey</a> | <input checked="" type="checkbox"/> <a href="#">Morrison, Mary</a>    |

### Message Details

*Please enter the subject and content of your message.*

#### Subject

#### Message

### Committees

All the committees that have been created for this team will be shown under the Committees title, as well as all members of the team individually under the Send To: section.

You may check the names of any individuals you wish to receive the e-mail. If you prefer to send your e-mail to the total membership of a committee or several committees, click the checkboxes associated with each desired committee. As in the illustration above, those individuals who are not on the selected committees will be automatically unchecked in the Send To: list.

### Send To

If you wish to select or unselect individuals after using Committee selection, simply check or uncheck their names. The e-mail will be sent to all those that are indicated in the Send To: section, whether you have chosen them by committee selection or individually.

### Message Details

Enter the subject of the e-mail in the Subject field. Type in the text of the message in the Message field. When you are satisfied with all elements of the e-mail and its delivery choices, click the Send button at the bottom of the screen.

## Using a Committee as a Security Group

Organization Administrators or Editors of specific documents may also use Committees as a Security Group to add permissions to areas of the team, to pages or to individual documents.

There are several rules that govern permissions and that must be considered when an administrator adds committees as a Security Group.

- **Permissions are set at one of five levels per group/individual.** Readers can view content; Participants can respond to the content; Authors can create new content and Editors can modify or remove any content. No Access is generally not applicable for committees, as committee members usually have access through another group, such as Team Members, that would grant less restrictive access.
- **Permissions granted (or restricted) to individual users take precedence over permissions granted to groups of users.** For instance, if a user is added to the permissions list by name (using the Add User button), that permission level will supersede permissions the individual received as part of a group.
- **If a user has access through multiple groups or as an individual, the least restrictive permission applies.** For instance, if a user is a member of a committee and also a Team member (which is always the case), the permission that grants the user the highest level of access is in force.
- **Permissions of administrative users, such as organization administrators, site admins and Team leads, cannot be restricted.** As necessary for administrators to perform their assigned tasks, permission level assignments do not override administrator privileges, which are set to Editor permission.
- **New permissions and inherited permissions have equal dominance.** New permissions do not automatically override inherited permissions and vice versa. The second, third and fourth rules apply and settings under these rules become the inherited permissions from this level downwards in the Team™ structure.

General Information
Permissions

### Permissions

Use this page to control the level of access to content and functionality.

Add Committee
Add User

Group/User	No Access	Reader	Participant	Author	Editor	Remove
✱ Team Guests	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
✱ Team Members	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
✱ 2005 Planning Committee	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
✱ Management Committee	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

#### Permission Rules

- "Readers" can view content, "Participants" can respond to the content, "Authors" can create new content and modify their own content, and "Editors" can modify or remove all content. "No Access" revokes permission granted at a higher level.
- Permissions granted to individual users take precedence over permissions granted to groups of users. If a user has access through multiple groups, the least restrictive permission applies.

Default Permission
 Overridden Permission

Reset to Default
 Remove

New Permission
 Cannot Remove

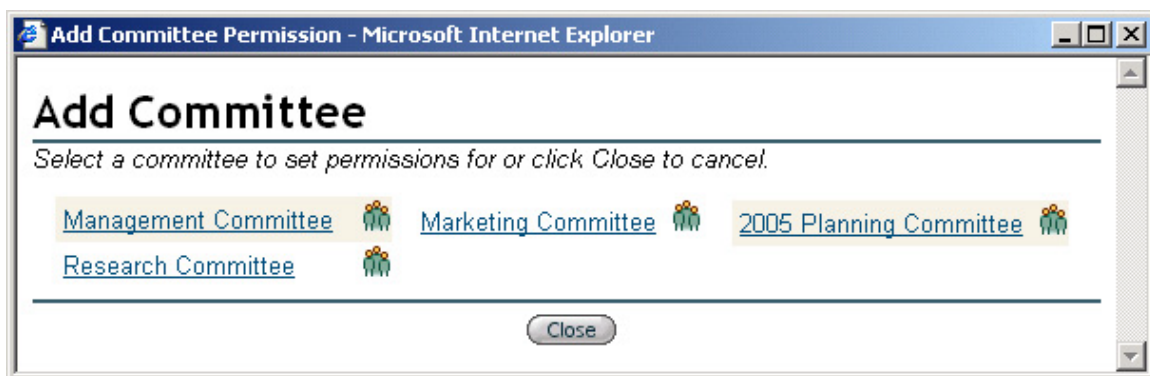
Save
Cancel



In the example above, permissions are being set on a specific document. Inherited permissions were overridden to allow No Access for any Team member or Guest. Then explicit permission was set for Planning Committee to have Editor privileges and Management Committee to have Reader privileges. In this way, access to the document was controlled by blocking the Team members entirely and giving the committees the least restrictive permission level, as described by the third rule, above.

To add an individual Team member to the Permissions screen, click on the Add User button. The names of all users on the Team will be displayed. Click on the user's underlined name to add that individual to the Permissions screen.

To add a committee to the list, click the Add Committee button. A list of all committees within the Team will appear. See example below.



Click on the underlined committee name to add that committee to the Permissions screen. You will be returned to Permissions, where you may adjust permissions to necessary levels. When all permissions are at the desired levels, click the Save button at the bottom.



## Step-by-Step in Committees

### Adding a Committee

- Click the Committee link on the tan navigation bar
- Click the New Committee button
- Enter a name for the committee
- Type in a description, if desired
- Click the Add Member button
- Select a desired member
- Repeat Add Member selection until membership is as desired
- Click the Save button



### **Sending a Committee E-mail**

- Click the Send Team Email link on the tan navigation bar
- Click the checkbox associated with any committees who you desire to receive the e-mail
- Under the Send To section, select any other individuals to receive the e-mail
- Enter a subject for the e-mail
- Type in the e-mail message
- Click the Send button

### **Setting Committee Permissions by Admins or Editors**

- Select the area or document on which to set permissions
- Click the Edit Page button or the edit icon, depending upon the item to which you wish to add committee permissions
- Click the Permissions tab on the page
- Click the Add Committee button
- Select the committee name
- Set permissions using the radio buttons associated with the committee name
- Click the Save button