Legistar User Guide

Legistar User Guide

Legistar helps you manage the legislative process, from drafting files to publishing agendas and minutes.

Learning Legistar	This section reviews the Legistar interface and setup procedures. Learning Legistar also covers the different menus and modules in Legistar.
Pre-Agenda Approval in the Files Module	This section explains how legislation is drafted into Legislative Files in the Legislative Files module. In this stage of the Legistar workflow you will also begin the Approval Tracking process. The Approval section reviews how to approve legislation submittal requests for the public agenda. This stage of the Legistar workflow completes the Approval Tracking process.
Agenda Creation in the Agendas Module	This section explains how to create an agenda with the approved legislative files. This chapter also explains in detail how to format, edit, and publish your agenda.
Meeting Action Management in Meeting Manager	This section captures how to record your meeting video and actions in Meeting Manager.
Meeting Finalization in the Minutes Module	This section explains how to edit and publish your meeting video and minutes documentation.

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Learning Legistar

Overview

The Legistar system is an all-in-one product for managing your documents and meeting management responsibilities. Legistar works with other products in your Granicus solution to perform the following tasks:

- Maintain supporting documentation
- Generate agendas
- Manage meetings
- Control and support workflow
- Index meeting video
- Create minutes
- Publish data, reports, files, and media to the web
- Organize and track legislative files

Workflow

To help you get the most from your Granicus solution, the contents of this guide have been organized to fit a specific workflow of how Legistar is best used. You will be led through the following steps:

Pre-agenda Approval in the Legislative Files Module

1. Legislation details are drafted into legislative files by department “drafters.”
2. Legislative files are routed through the Approval Tracking System (ATS).
3. Approved legislative files are scheduled for the upcoming agenda.

Agenda Creation in the Agendas Module

1. Legislative files are reviewed by the clerk’s office.
2. Agenda is generated and the agenda report is published to InSite.
3. The meeting data is exported to MediaManager for the meeting to be available for loading in LiveManager.

Meeting Action Management in LiveManager

1. During the meeting, the meeting’s actions are recorded in LiveManager.

Meeting Finalization in the Minutes Module

1. Meeting video is trimmed and timestamps are edited in MediaManager, and the video is published in InSite.
2. Minutes data is reviewed in the Minutes module.
3. Minutes report is run and published to InSite.

>>Next Section: Signing in to Legistar

Signing In to Legistar 5

Before you sign in to Legistar you must have a user account and password for Legistar. If you do not have these credentials, please contact your System Administrator.

If you do not have a Legistar icon on your desktop, go to Start > Programs > Legistar 5 to open the program. You can create a Legistar desktop shortcut by navigating to Start > Programs and dragging and dropping Legistar 5 onto your desktop.

1. Double-click the **Legistar icon** on your desktop.

Legistar Icon

2. Enter your **User Name** and **Password** in the Sign In window. Your password is case sensitive and must contain a minimum of six characters.

   If you lose your username or password, contact your Legistar system administrator.

3. Select your live database from the dropdown menu. Your live database stores the work and settings relevant to your meeting body. Your other database is for training purposes only.

4. Verify the **Local** radio button is selected. The Local connection allows you to connect to Legistar through your local network. The Remote connection is for connecting to Legistar over the internet. **Best Practice:** Select the Local radio button.

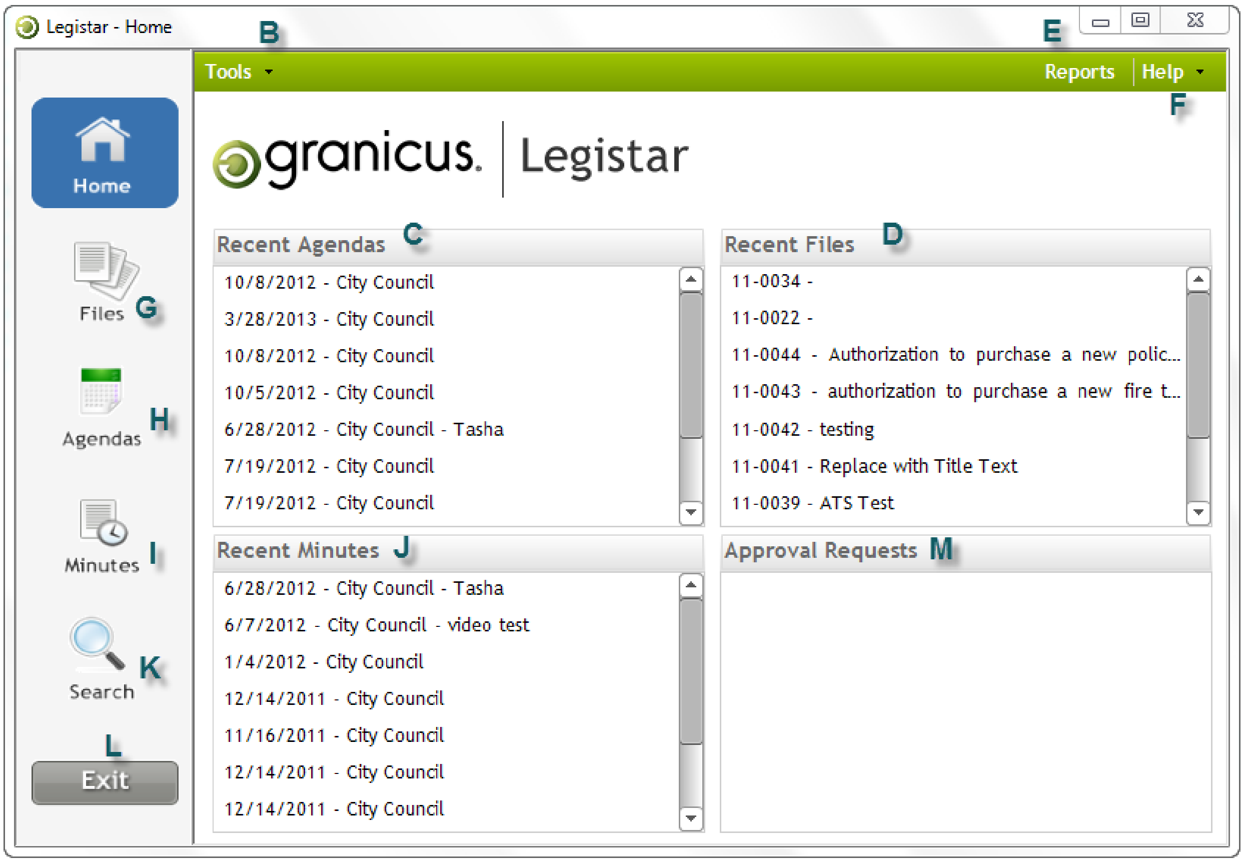
5. Click **Sign In**.

Signing in to Legistar

>>Next Section: Navigating the Legistar Home Module

Navigating the Legistar Home Interface

When you first open Legistar, the application opens from within the Home module. Familiarize yourself with the location of the following buttons and features:



A. Home Module

B. Tools Menu

C. Recent Agendas

D. Recent Files

E. Reports Button

>>Next Section: Legistar Menus and Modules

Legistar Menus and Modules

It's important for you to understand the way Legistar divides the workflow and functionality of its software. There are six different menus and modules in Legistar that we recommend you familiarize yourself with.

The Home Module

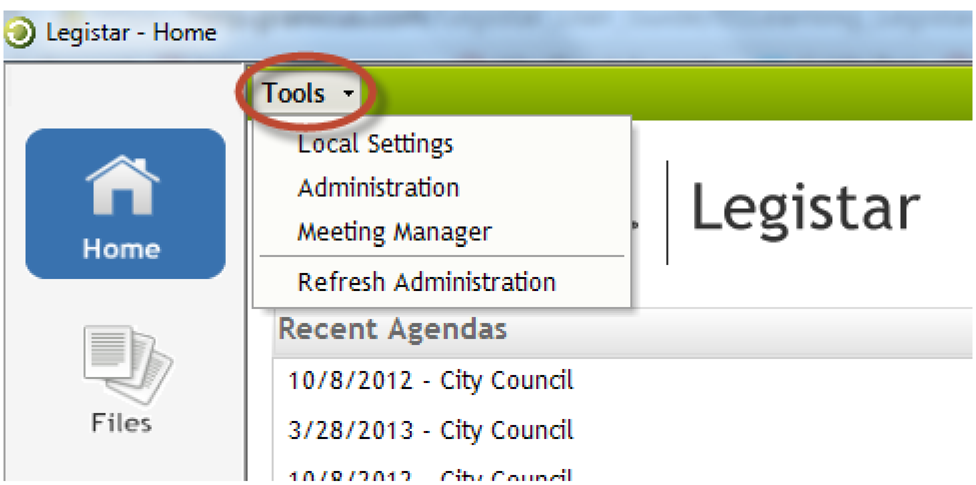
When you first open Legistar, the application opens from within the Home module. From this interface you have multiple options for opening recent files, viewing recent approval requests, and launching other menus and modules.

The Recent Agendas, Recent Minutes, Recent Files lists, and Approval Requests displayed on the Home screen are auto-populated based on the records you have most recently edited or visited for more than 20 seconds.

The number of files that appear on these lists can be adjusted in **Local Settings > Personal Settings** under the **Tools** menu on the Home screen.

The Tools Menu

Settings for personalizing what you see in the Legistar interface and for access to Legistar Admin can be found via the Tools dropdown menu in the Home module.

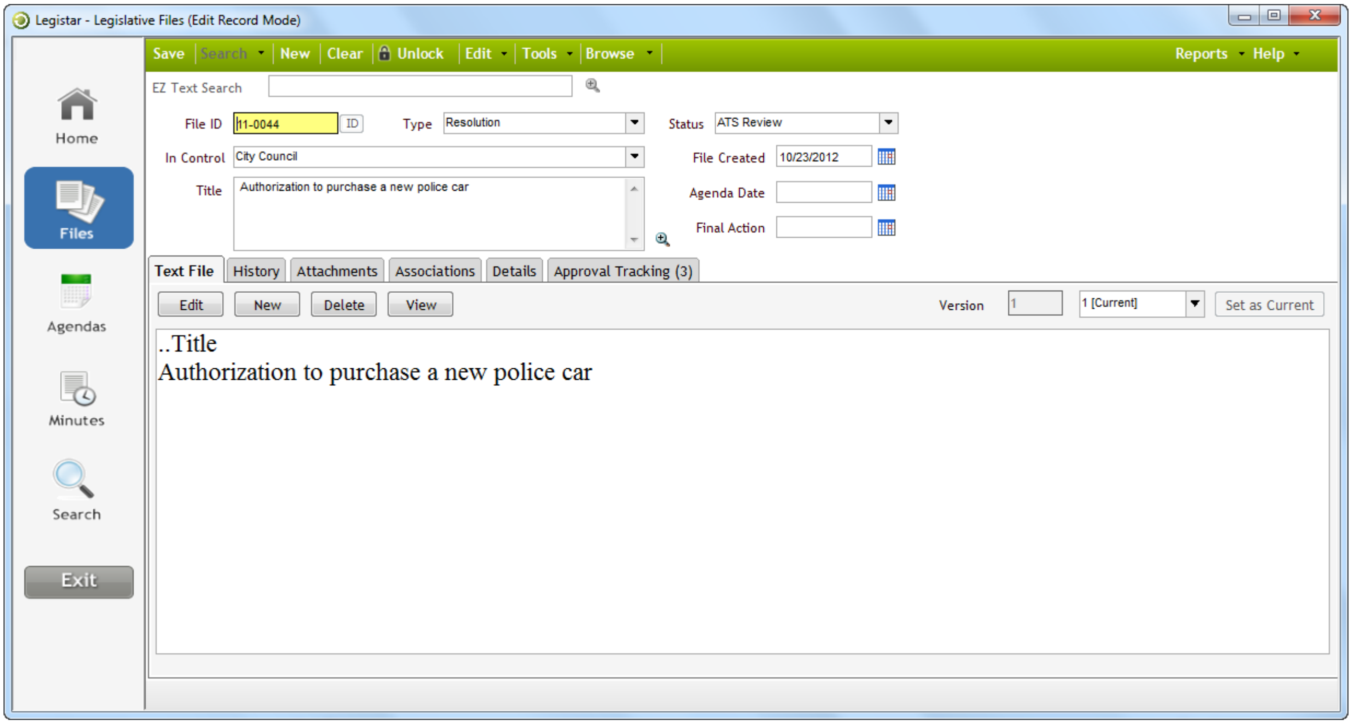


Tools Menu

Option	Description
Local Settings	From this menu you can personalize Legistar to enhance your meeting workflow
Administration	In Administration you can configure the database to match the workflow of your Legislative Management
Refresh Administration	Select Refresh Administration to enable your recent changes

The Files Module

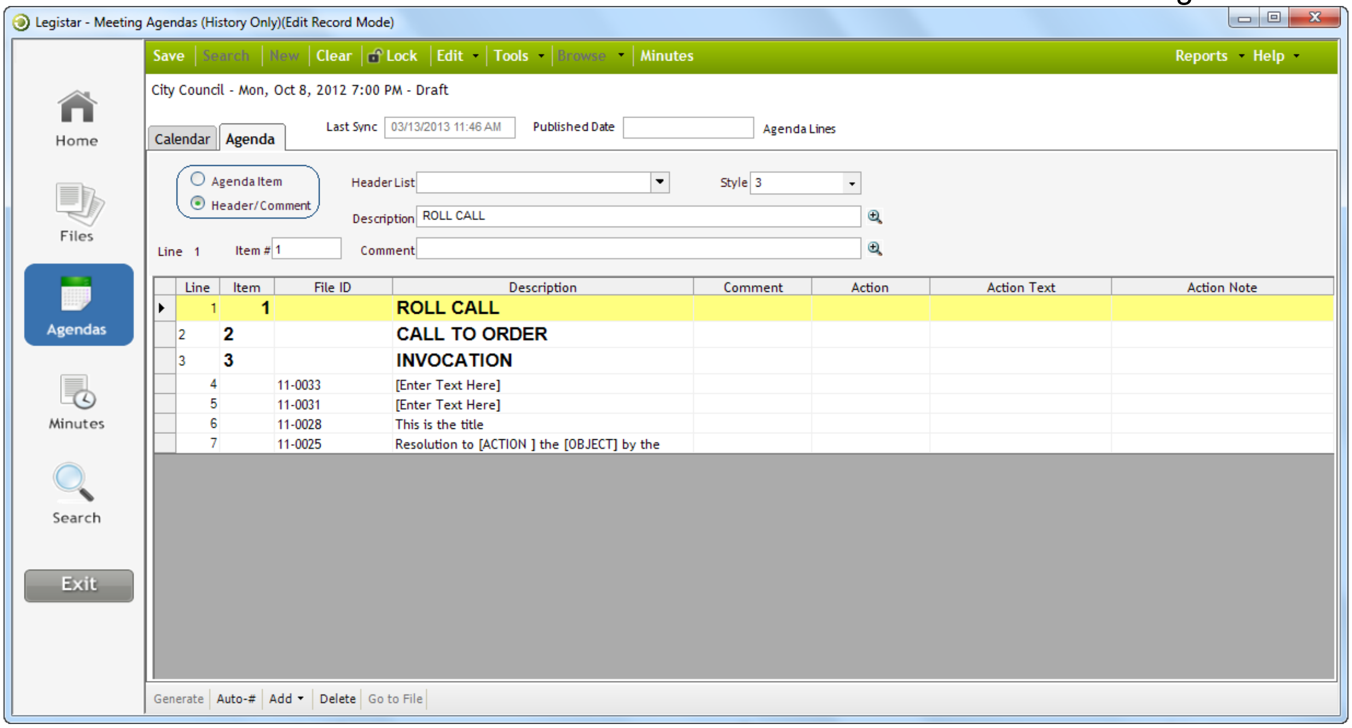
In the Files module you can create the files required to build the agenda. If you have Approval Tracking enabled, this is where you perform the first steps in starting the sequence.



Files Module

The Agendas Module

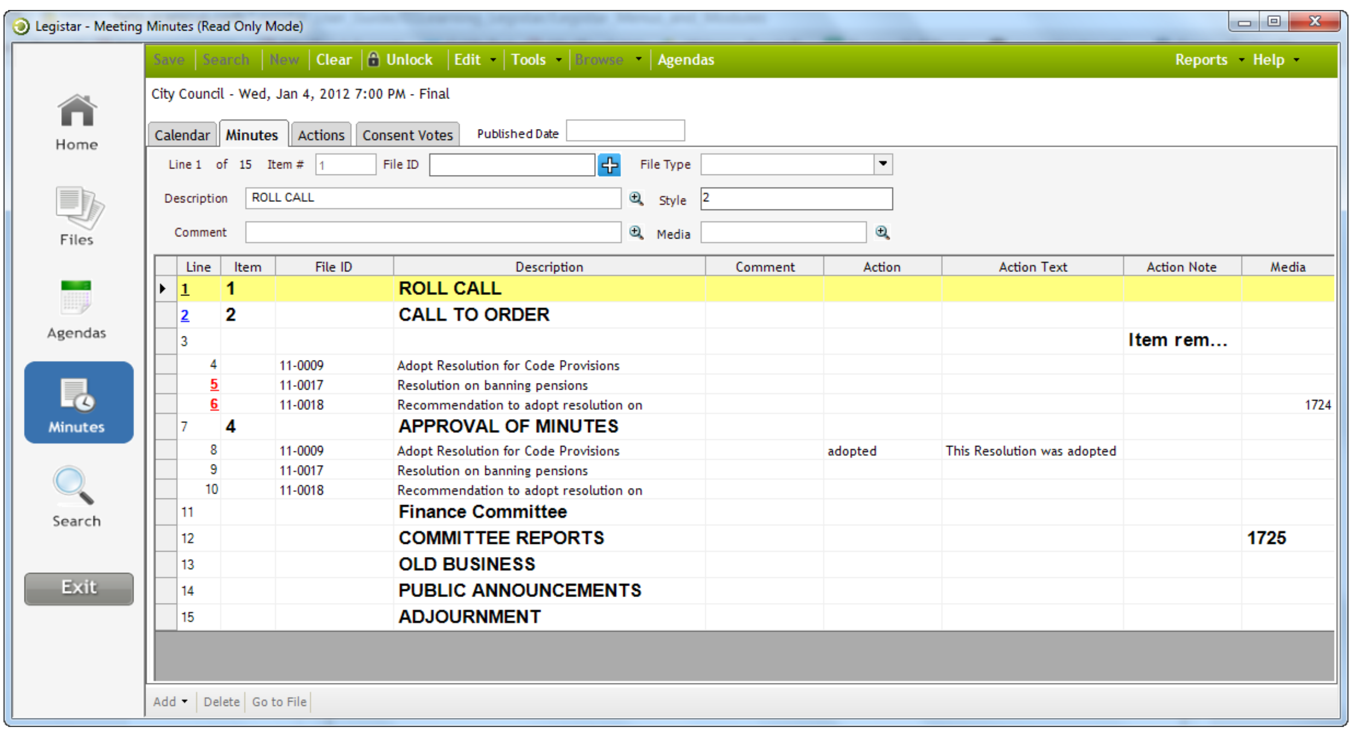
In the Agendas module you will generate the agenda, work with agenda lines, auto-number, and prepare your agenda for publishing.



Agendas Module

The Minutes Module

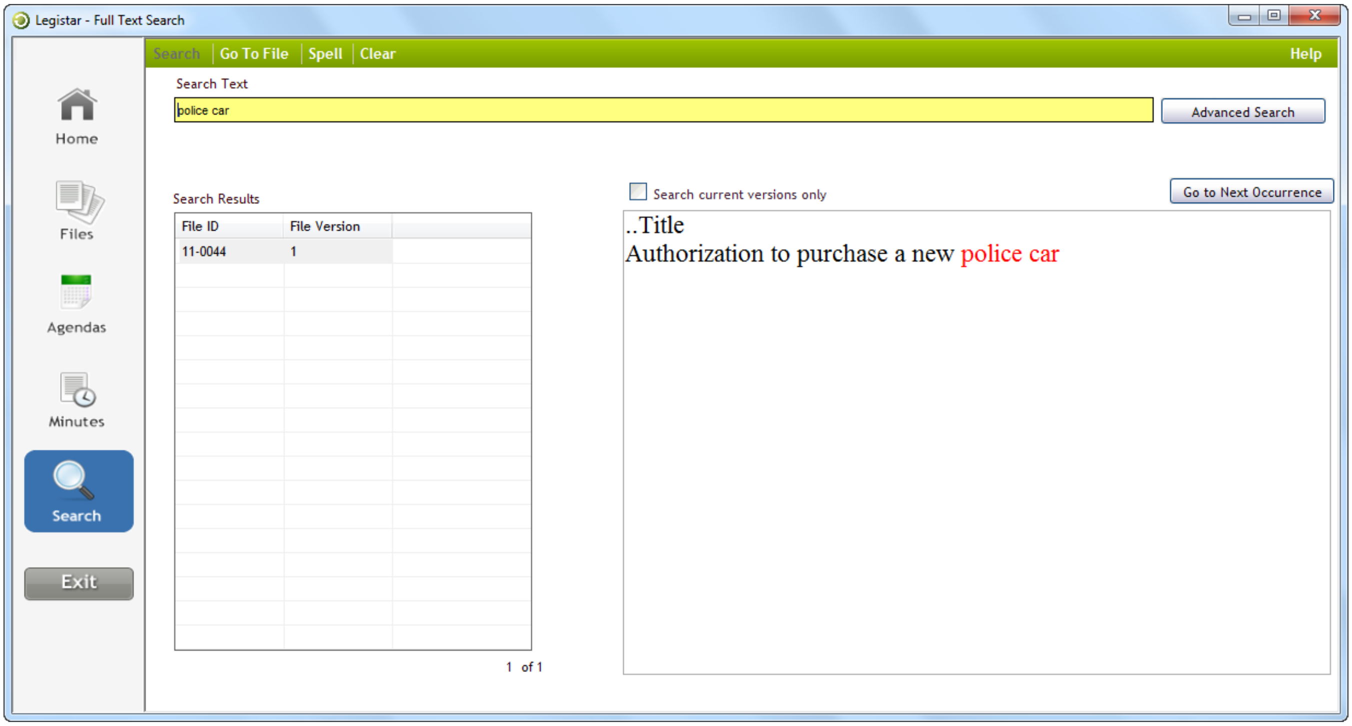
In the Minutes module you can record the roll call, actions, votes, and notes of your meeting, as well as finalize the meeting's minutes.



Minutes Module

The Search Module

The Search module features a search field that allows you to input text and return highlighted results from within legislative files.



Search Module

The Reports Module

Every module in the Legistar interface contains the Report module; however, different reports are generated depending on the active module.

Reports Module - Example Legislative File Report

>>Next Section: Common Legistar Module Functionality

Common Legistar Module Functionality

Inside each of the Legistar modules, you will find the following fields and buttons. The functionality of these items will work the same within each module, although the options under each button may differ.

Select any of the modules (Files, Agendas, Minutes, or Search) to see the following features at the top of the interface:

Common Module Features

Item	Description
Save	Allows you to save any changes made since entering the module screen
Search	Allows you to search the Legistar database (available only in Search Mode). You can enter data or select the appropriate values and click Search; this prompts Legistar to retrieve all the matching corresponding data
New	Allows you to create a new file in the Legistar database
Clear	Clears display information and returns you to Search Mode
Lock	Prevents any changes from occurring on the file until it is unlocked
Edit	Allows you to edit text fields with tools such as cut, copy, and paste
Tools	Gives you access to a variety of different options and functions depending on the screen
Browse	Allows you to review the screen records or the records most recently accessed
Reports	Allows you to select a report to run based on the displayed Legistar data
Help	Contains information on specific fields as well as many of the process steps found in this manual. Each screen has a Help button that covers the relevant screen

>>Next Section: Date Fields and Calendar Buttons

Date Fields and Calendar Buttons

The date fields within Legistar store and display dates in the mm/dd/yyyy format. To enter dates, complete the following steps:

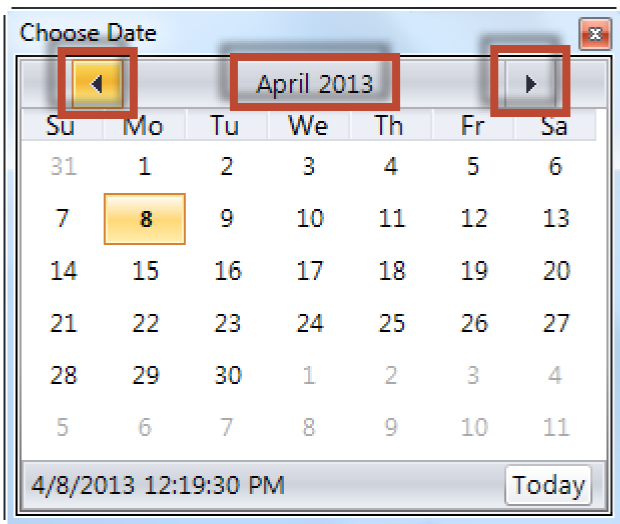
1. Click the **Calendar** button

   next to any of the date fields. The calendar window opens.

2. Select a **date** from the calendar. The entered date is highlighted.

- Click the **directional arrows** to select a different month.
- Click and hold the **month and year** to select from a list of months.



Calendar Window

The entered date will appear in one of the following three colors; these colors are customizable in Admin, but the recommended defaults are:

- **Black**- Past date
- **Red**- Today's date
- **Green**- Future date

Note: You can also enter the date in the text field using the mm/dd/yyyy format.

Note: When selecting the Agenda Date from the calendar, you can only select a scheduled meeting date highlighted in green. This setting can be enabled and disabled in **Admin > System Settings > Restrict Agenda Date Selection**.

Date Entry Shortcuts

Legistar provides you with a series of shortcuts to quickly and efficiently auto-fill dates in the system. Enter the following in a date field (replacing any # signs with the desired number) and press the **Tab key**:

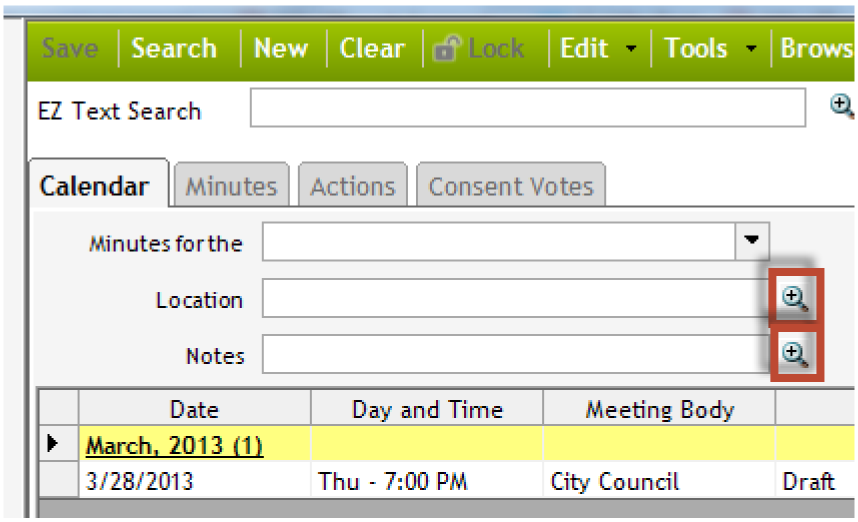
Shortcut	Description
T	Enters today's date in the active field
+#d	The date moves ahead by the specified number of days; for example, enter +10d to jump forward ten days
-#d	The date moves backward by the specified number of days; for example, enter -10d to jump ten days into the past
+#w	The date moves ahead by the specified number of weeks; for example, enter +2w to jump forward two weeks
-#w	The date moves backward by the specified number of weeks; for example, enter -2w to jump two weeks into the past
+#m	The date moves forward by the specified number of months; for example, enter +2m to jump forward one month
-#m	The date moves backward by the specified number of months; for example, enter -2m to jump two months into the past
+#y	The date moves forward by the specified number of years; for example, enter +1y to jump forward one year
-#y	The date moves backward by the specified number of years; for example, enter -1y to jump one year into the past

>>Next Section: Editing Text in Legistar

Editing Text in Legistar

Zoom Windows

Many of the fields in the Legistar modules have a zoom icon (a magnifying glass with a "+" in the middle) located to the right of the field. Click this button to open the Zoom window; this allows you to edit the field’s text in detail.



Zoom Icons

1. Click the **Zoom icon** next to the text field you wish to edit. If the record is locked, the Zoom window will open in read-only mode.
2. Click in the text field of the Zoom window to edit text.
3. Use the following buttons to edit the text.

Zoom Window Buttons

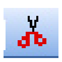
Button	Description
OK	Closes the form, also saves any changes
Save	Saves any changes you make within the text field. This button is helpful if you are doing an extended amount of editing
Print	Click **Print** and choose the connected printer from the **Name** dropdown menu. Click **OK**

Paste	Click **Paste** to input any text you have copied to the clipboard. To copy text, highlight any text from within a field in Legistar and press **Ctrl + C**
Spell	Runs a spell check on any of the text within the zoom window text field
Add	Launches the Standard Paragraph tool from which you can enter text you use often
Help	Launches additional help information for the Zoom window
Cancel	Closes the Zoom window without saving any of the changes you have made

4. Click **Save**.

Rich Text Formatting

You may see additional buttons for editing text. These buttons are part of the RTF - Rich Text Formatting - Zoom box, signified by a magnifying glass icon with an "A" in the center.

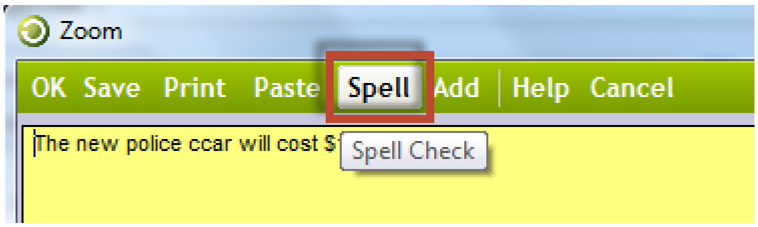
Button	**Description**
Cut 	Highlight the text from the Zoom window and click the Cut button to remove the text and copy it to your clipboard for pasting elsewhere
Copy 	Highlight the text from the Zoom window and click the Copy button to duplicate the text to your clipboard for pasting elsewhere
Find 	Locates the occurrence(s) of a word in a document
Bold 	Highlight the desired text and click the B button to bold the text
Italics 	Highlight the desired text and click the I button to Italicize the text
Underline 	Highlight the desired text and click the U button to Underline the text
Strike 	Highlight the desired text and click the Strike button to place a line through the text
Color 	Changes the color of the foreground text
Font 	Changes the text font and size

>>Next Section: Spelling Check Tool

Spelling Check Tool

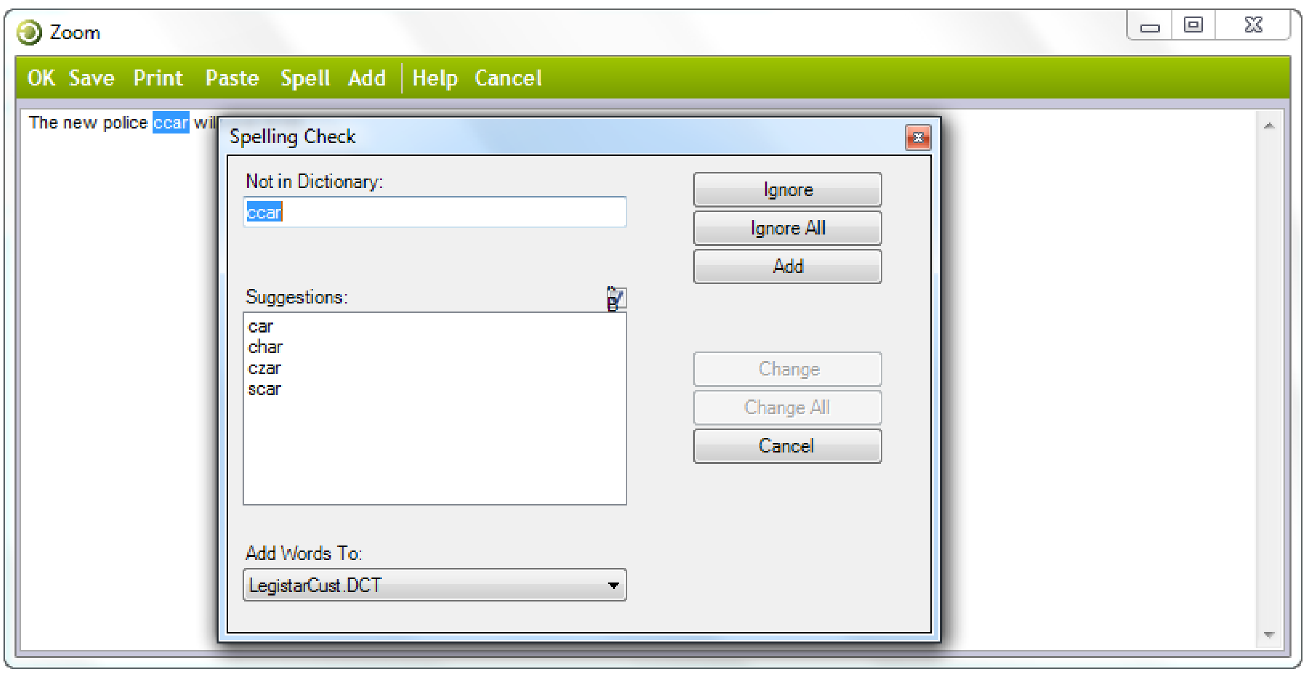
The Spelling Check tool in Legistar is similar to other spell check tools you may have used before. The features of the Spelling Check tool are described below.

1. Click **Spell** in the zoom window. The entered text will automatically be checked for any errors.



Spell Button

2. Review the features below to choose to ignore the spelling suggestion, add the word to your dictionary, or change the misspelling to the suggested word.



Spelling Check Window

Item	Description
Not in Dictionary	Lists the possible misspelling or unrecognized word. Also displays the new entry to which the word should be changed

Suggestions	Possible listed corrections to the misspelled or unrecognized word. Select the checkbox to hide the suggestions. Select a suggestion from the list and click Change to modify the original word
Add Words To	Specifies the dictionary to which new words will be added. The default location is the Legistar dictionary on the Legistar server
Ignore	Disregards the instance of the misspelled or unrecognized word
Ignore All	Disregards all instances of the misspelling or unrecognized word
Add	Appends the misspelled or unrecognized word to the current custom dictionary
Change	Alters the instance of the misspelled word to the selected altered word. This button is enabled when the possible misspelling in the Not in Dictionary field has been changed
Change All	Alters all instances of the misspelled word to the selected altered word. This button is enabled when the possible misspelling in the Not in Dictionary field has been changed
Cancel	Disables the current spell check process

3. Click **Exit** to leave the Spelling Check tool and click OK at the prompt.

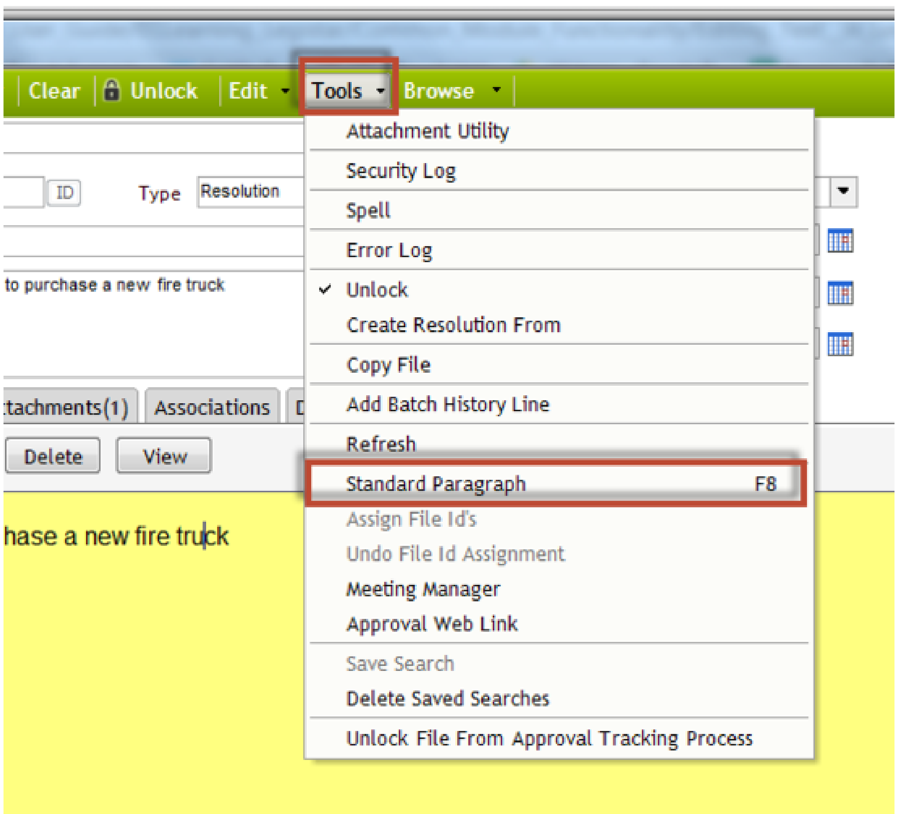
>>Next Section: Standard Paragraphs

Standard Paragraphs

The standard paragraph feature allows you to store commonly used sentences and paragraphs in one location. Then, you can copy the text to the clipboard and paste it into an area of Legistar as needed.

Loading a Standard Paragraph

1. Click **Tools** > **Standard Paragraphs** or press **F8** to access the Standard Paragraphs window.



Selecting Standard Paragraph from the Tools Menu

2. Select the stored standard paragraph name from the list or search for a specific standard paragraph using the search box.
3. Click **Copy To Legistar Clipboard** to copy the text to the clipboard.
4. Click within the text field to make it active.
5. Right-click within the field> select **Paste** to paste the standard paragraph into the field.
6. Click **Save.**

Creating a Standard Paragraph

Complete the following steps to create standard paragraph text.

1. Click the **Home module** icon.
2. Select **Tools > Administration**.
3. Select **WorkFlow Control > Work Flow Options > Standard Paragraphs** from the menu on the left.
4. Enter a title in the **Paragraph Name** field.
5. Enter the standard paragraph text in the **Paragraph Text** field.
6. Click **Save**.

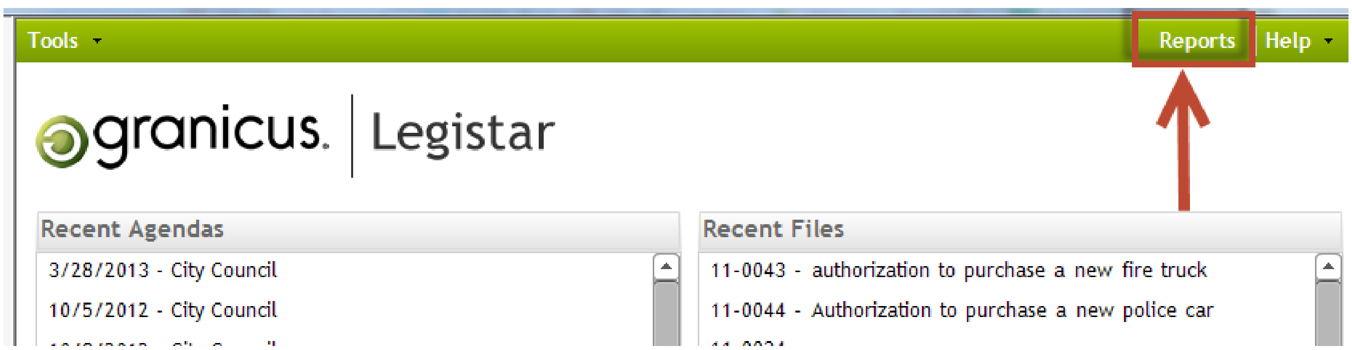
>>Next Section: Legistar Reports

Legistar Reports

Every module in the Legistar interface contains the Report button; however, different reports are generated depending on the active module. The Reports feature in Legistar is used to retrieve and format almost any sort of information from the system. You can run reports for specific files, meeting minutes, agendas, or general information that meets your criteria.

Launching Reports

The Reports button is always located in the upper right-hand corner of the screen.



Reports Button

If you're opening Reports from the Files, Agendas, or Minutes Modules you will have to select a report type from the dropdown menu before you can open the Reports window.

Click **Reports** and select one of the report types to open.

Common Report Settings

Each Report window in Legistar contains settings specific to that (Legislative Files, Agendas, and Minutes) module.

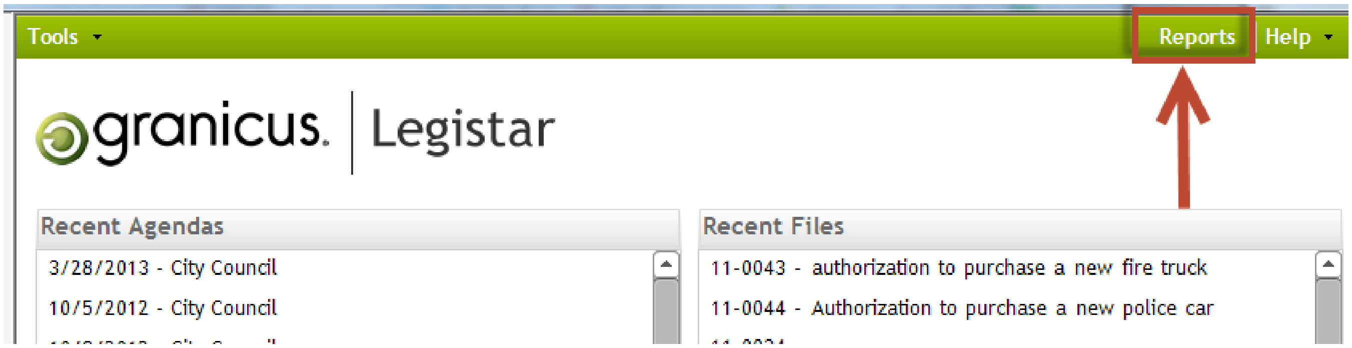
Setting	Description
Destination	This setting allows you to choose where you will send a finished report. Generally, your options include a PDF, HTML, printer, InSite, MS Word document, and email. Select a Destination option from the dropdown menu.
Save Settings	Allows you to save the enabled settings for the report.
Include Attachments	If the selected report includes attachments, selecting this checkbox will print both the attachments and the report.
Save the Report	Select this checkbox to save the report. A Save dialogue box will open prompting you with instructions.

>>Next Section: Running a Report

Running a Report

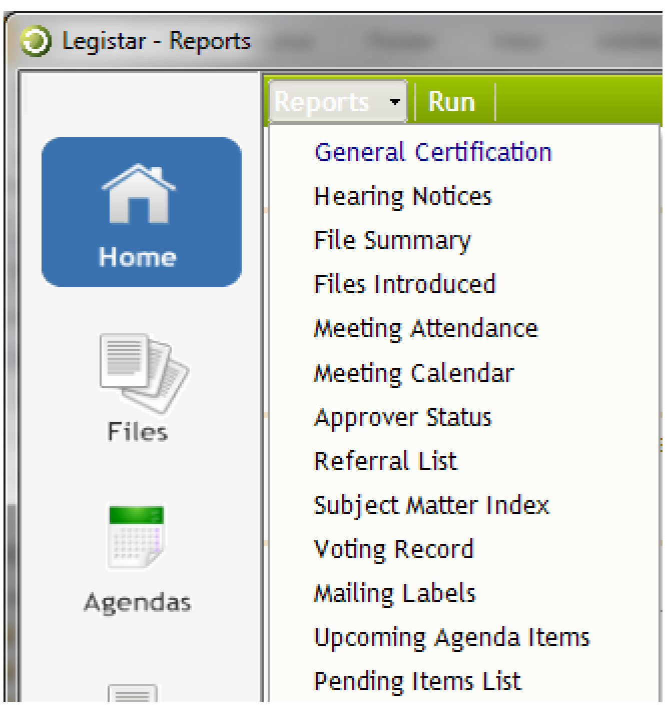
To run a report in Legistar, complete the following steps from any module:

1. Click **Reports** in the upper right-hand corner of the window.



Reports Button

2. Click the **Reports** drop-down menu and select one of the report options. These options are described in the table below.



Reports Drop-down Menu

Report Option	Description
General Certification	Standard legal template for surrounding text that needs to be certified
Notice of Public Hearing / Hearing Notices	Provides notice of a meeting and is available from the Agenda screen. If a special meeting is scheduled that is not entered in Legistar, this report can be used to create a notice for the meeting
Matter Summary / File Summary	A summary for a file or group of files. Available from the Home and Files modules
Matters Introduced / Files Introduced	A lists of files introduced in user-defined date ranges
Meeting Attendance	Contains the attendance records for specific member; it's organized by meeting body
Meeting Calendar	A list of upcoming or past meetings
Approver Status	Lists all the files that are currently in a "Review Requested" or "Review Paused" status for any given approver. This report shows how many files any given approver still has to act on. The report is available from the Home screen, and displays the following data: File ID, Approver name, Request Date, Escalation Date, Agenda Date, Title. You can select 1 or more approvers, and whether to show or hide paused sequences.
Referral List	Lists outstanding referrals that have not been returned. It contains information on the body to whom the referral was made, the date it was made, and the body that referred the matter
Subject Matter Index	A list of files based on the Index Terms added in the Associations tab

Voting Record	A record of a Council's votes in a specific body and / or for a specific date range
Mailing Labels	Creates Mailing Labels or lists of the people entered in Administration
Upcoming Agenda Items	Pulls items based off the date range selected at run time. You can also select the file type and body to use to generate the report. You can run this report from the Home screen
Pending Items List / Pending List	Lists files currently under pending committee actions

Note: The items you see here may be different depending on the module you are in and how your Legistar system is configured.

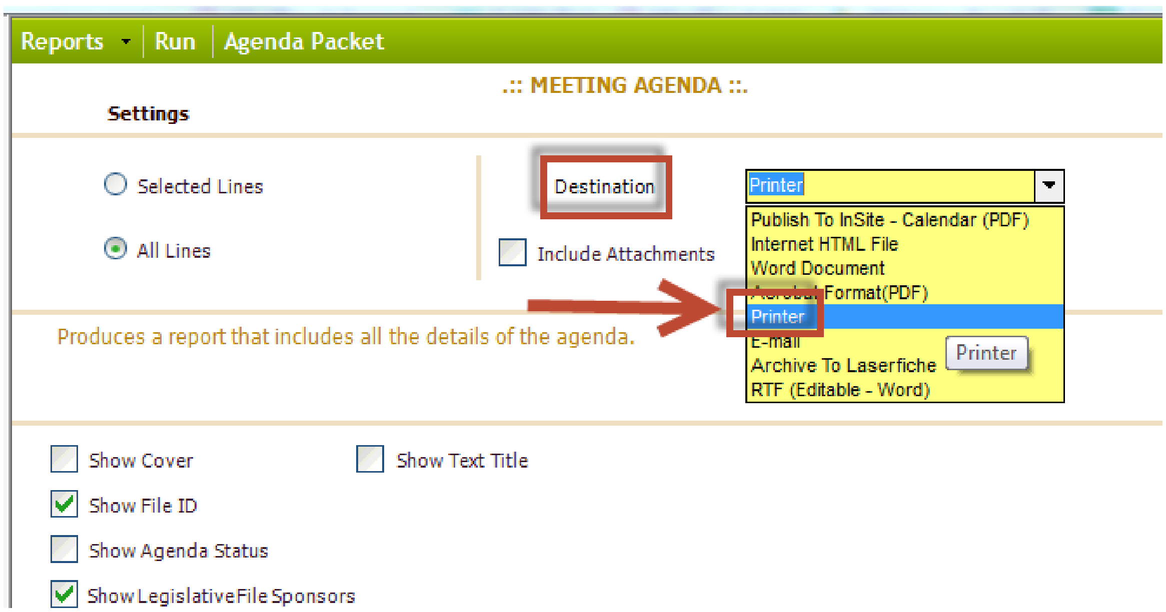
3. Enter the appropriate settings as desired.
4. Select the report's **Destination** from the drop-down menu available.
5. Click **Run** to generate the report.

>>Next Section: Printing a Report

Printing a Report

You can print any type of report from within any Legistar module. Complete the following steps:

1. Click **Reports** in the upper right-hand corner of the window and select the report you want to run from the drop-down menu.
2. Click the **Destination** drop-down menu and select *Printer*.



Printing a Report

3. Select the appropriate settings as desired.
4. Click **Run**.

>>Next Section: Legistar Shortcuts

Legistar Shortcuts

There are several key combinations which can save you time performing various functions in Legistar:

Shortcut	**Description**
F1	Opens the Legistar Help Menu
F2	Opens the URL specified in **Administration > System Settings > General > Additional Home Screen Help Item Menu URL**
F6	Opens the View Media menu from the Minutes module
F8	Opens the Standard Paragraph menu
F11	Locks all fields within the Administration grid
F12	Unlocks all fields within the Administration grid
Ctrl+E	Enables Edit Record mode
Ctrl+C	Copies the highlighted text to your clipboard
Ctrl+X	Cuts the selected text to your clipboard
Ctrl+V	Pastes text from your clipboard to the location of the cursor
Ctrl+Z	The undo function; removes the last typed text or entry selected. You can press this key combination multiple times to undo multiple changes

>>Next Section: Locking and Unlocking Records in Legistar

Locking and Unlocking Records in Legistar

Locking a file prevents any changes to the file until it is unlocked. Locking and unlocking a file can be done by clicking the Lock button from the Files module or the Lock/Unlock toggle command on the Tools Menu. If the file is already locked, this option reads Unlock.

There may also be certain actions which lock a file. For example, after an item has been adopted the file will automatically lock. Only certain users have the ability to lock and unlock a file.

To lock a record, click **Lock** on the toolbar.

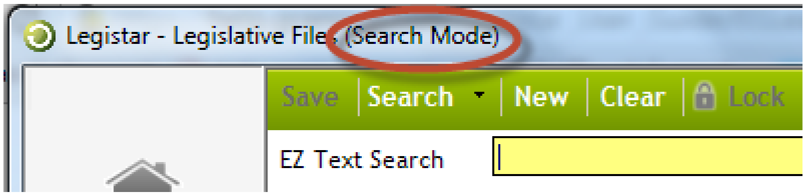
After you lock a record, the Lock button changes to say Unlock. Click **Unlock**

to reopen a record for editing.

>> Next Section: Work Modes in Legistar

Work Modes in Legistar

There are four different work modes in Legistar. You can see which mode in which you're working by looking at the top of the Legistar window.



Identifying Work Mode in Legistar

These are described in the table below:

Mode	Description
Search Mode	When you first open a module, the mode is already set to Search Mode, allowing you to enter variables for searching
New Record Mode	Enable by clicking **New** in the Files module
Edit Record Mode	Select **Edit** > **Edit Record** in order to enable editing of the different fields in the open record
Read-Only Mode	Read-only mode restricts users from performing any edits on a file. They can only view the information on screen

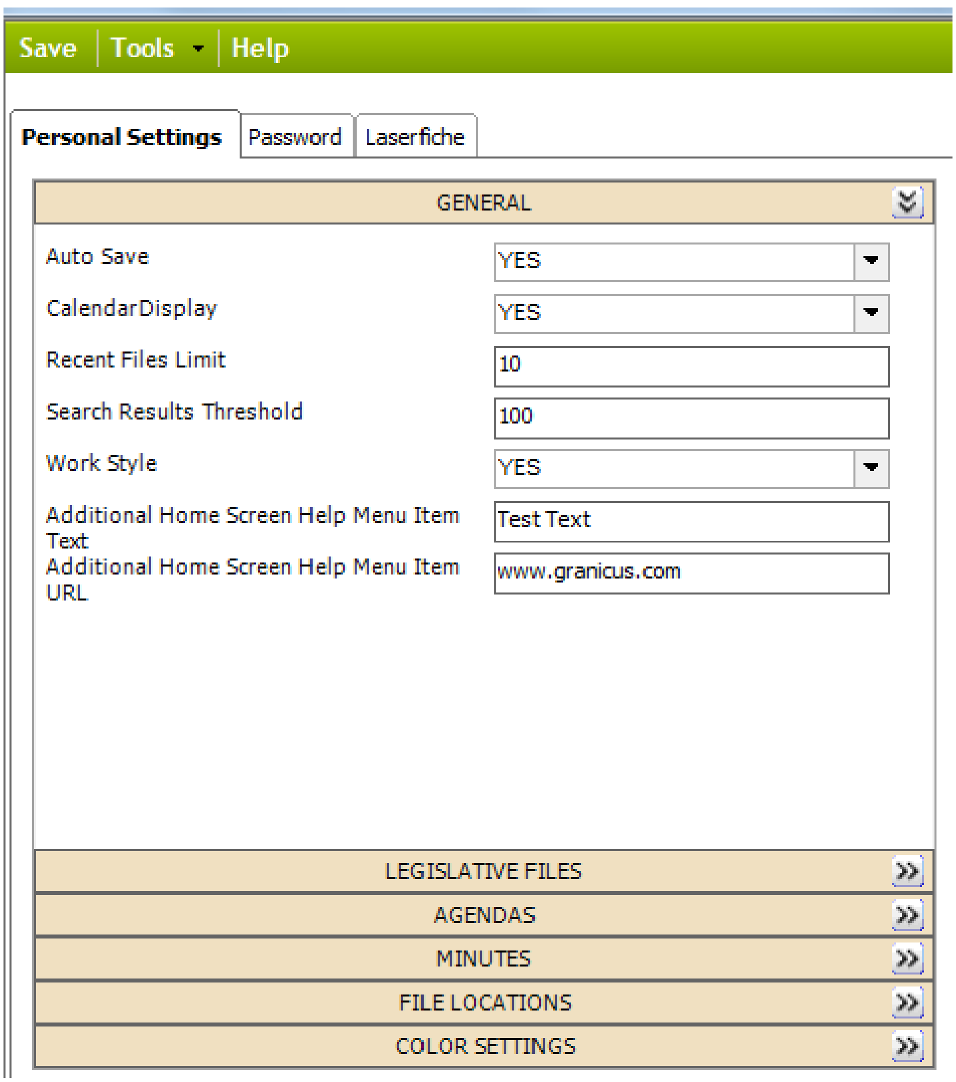
>>Next Section: Personalizing Legistar

Personalizing Legistar

Before you begin working in Legistar, we recommend you personalize the application to fit your workflow and individual needs. Complete the following steps to personalize Legistar.

Select **Tools** > **Local Settings** from the Legistar Home interface. The Personal Settings menu opens. Configure the application to suit your needs from this menu.

See the Related section below for topics about this section of Legistar.



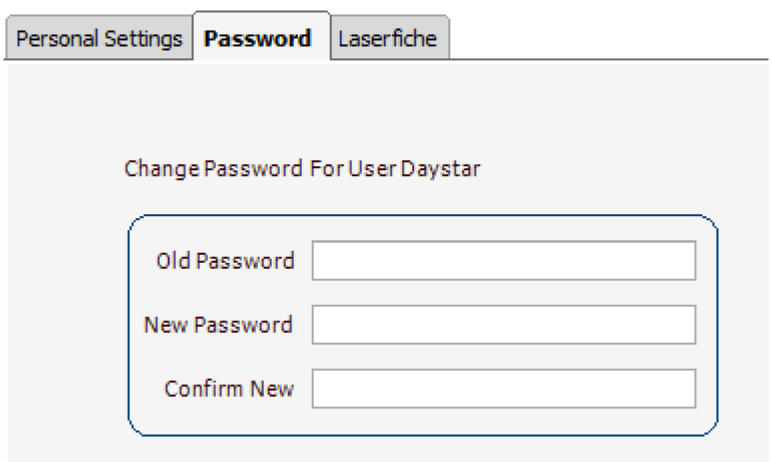
Personal Settings

>>Next Section: Changing your Password

Changing Your Password

Not all Legistar users have permission to change their own passwords. If you don't have permission, you need to contact your system administrator to change your password for you. If you do have the necessary permissions, complete the following steps:

1. Select **Tools** > **Local Settings** from the Legistar Home interface. The Personal Settings menu opens.
2. Select the **Password** tab.
3. Enter your **Old Password**.
4. Enter your **New Password**.
5. Enter your **New Password** again for confirmation.
6. Click **Save**.
7. Select the **Personal Settings** tab to return to the Personal Settings menu.



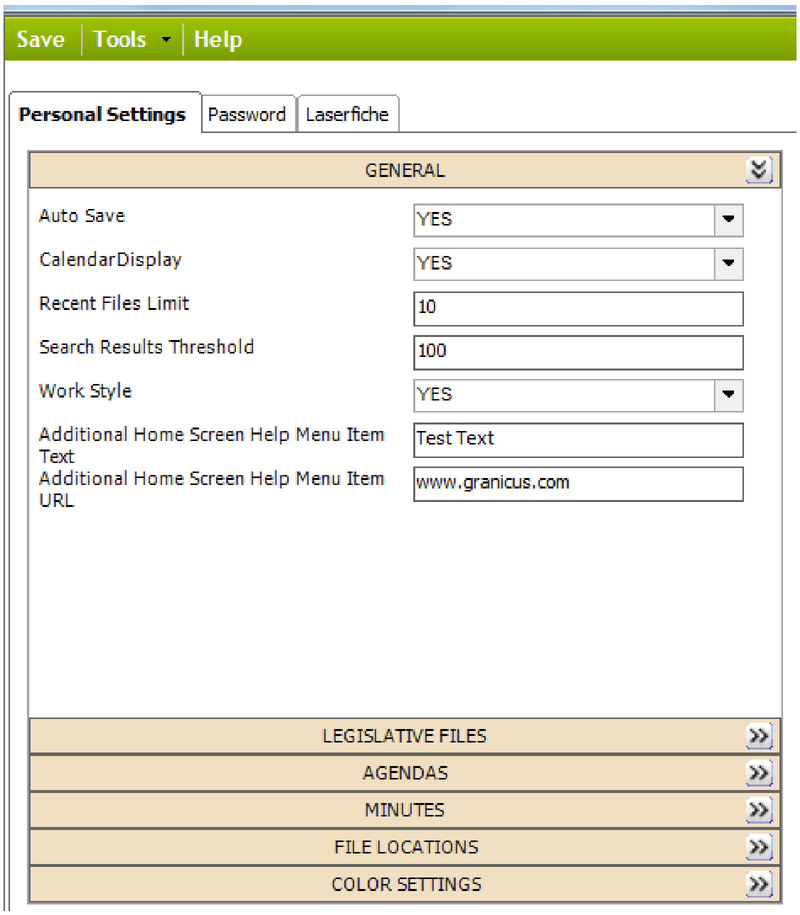
Changing Your Password

>>Next Section: General Settings

Personal Settings Menu - General Settings

Complete the following steps from the Personal Settings menu:

The General settings allow you to set default settings for any new files you create. See below for descriptions of each setting.



General Settings

Item	Description
Auto-Save	If set to YES, any changes made to Legistar data will auto save when you exit the interface. However, you should occasionally click the Save button when working in Legistar
Calendar Display	If set to YES, the Calendar tab within the Agendas and Minutes interface displays data from the default date ranges set in Personal Settings > Agendas and Personal Settings > Minutes
Recent Files Limit	Sets the default number of files that appear under the Recent lists on the Legistar Home interface

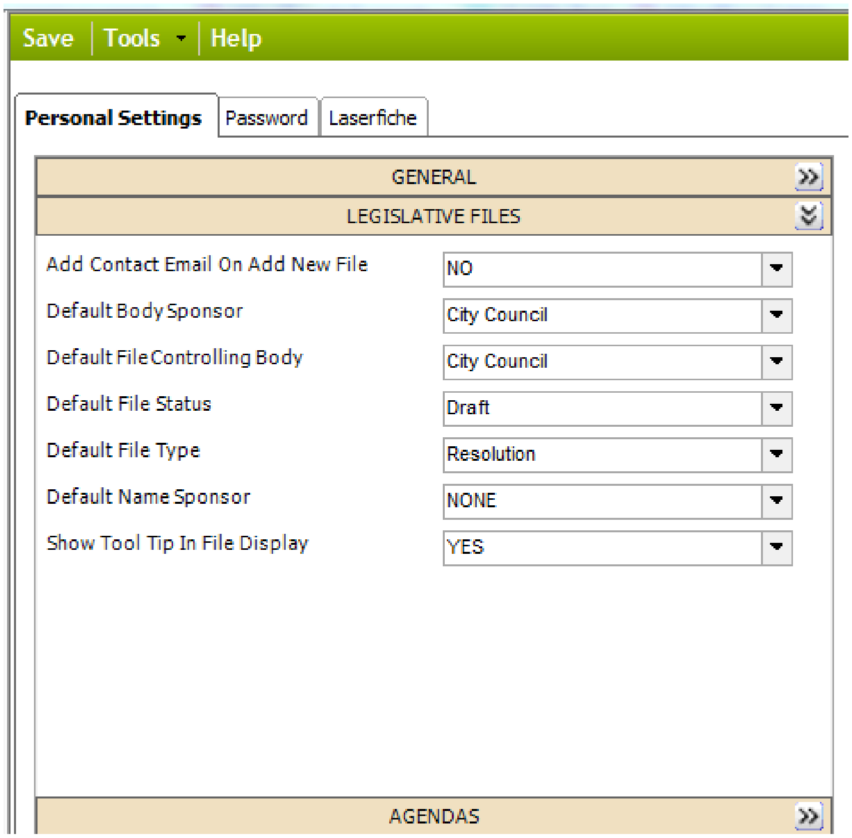
Search Results Threshold	Sets the maximum number of files retrieved within the Search feature. If there are additional files available outside of the set Search Threshold, you will receive a message requesting the display of all search results **Warning!** The maximum threshold you can enter is 999; however, a large threshold number may result in a slower retrieval speed. The recommended threshold is 100.
Work Style	If set to Yes, a rich text format is used to display the meeting data with which you are working in the Agendas and Minutes interfaces. This display is NOT a preview of your final agendas or minutes document
Additional Home Screen Help Menu Item Text	Use this field to insert an additional item into the Help Menu
Additional Home Screen Help Menu Item URL	Use this field to insert the URL to which the above item links

>>Next Section: Legislative File Settings

Personal Settings Menu - Legislative Files

Complete the following steps from the Personal Settings menu:

Click **Legislative Files** on the accordion menu. See below for descriptions of each setting.



Personal Settings - Legislative Files

Item	Description
Add Contact Email On Add New File	If set to YES, the Controlling Body's email will be included on a new Legislative File. The email address must be entered for a contact under People > Address and then set in Administration > Government Bodies > Bodies > Contact > select the person you entered in People
Default Body Sponsor	The default appears in the Legislative File module > Associations tab > Sponsor field
Default File Controlling Body	Sets the default Controlling Body for a new file, the Controlling Body has the ability to control legislative files that are set up for body security. This setting appears in Legislative Files > In Control when the user generates a new legislative file

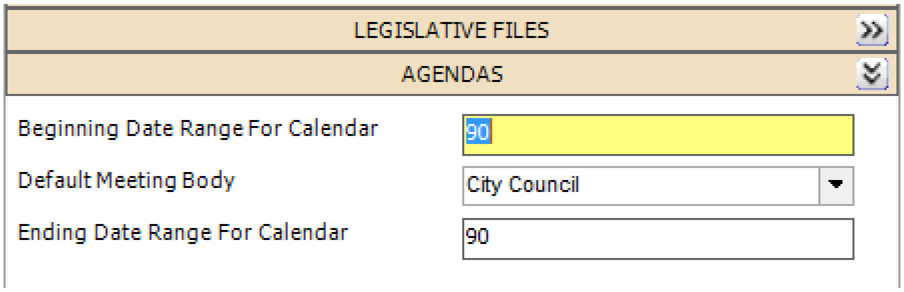
Default File Status	Sets the default status for a new legislative file. After the file is created, this status can be changed. The System Administrator can edit the available default status options via Administration > Legislative Files > File Status. File status examples include draft, passed, adopted, etc.
Default File Type	Sets the default file type for a new legislative file. After the file is created, the type can be changed. The System Administrator can edit the available default File Type options via Administration > Legislative Files > Type Name. File types include appointment, closed session, resolution, proclamation, etc.
Default Name Sponsor	Sets the individual sponsor for legislative files. The file's sponsors are displayed in Legislative File > Associations > Sponsors. Individuals are enabled as sponsors in Admin > Government Bodies > Bodies >any of the listed legislative bodies > Sponsor Type and can be edited by the System Administrator
Show Tool Tip In File Display	Allows you to mouse-over a field and receive a definition for that field. Only applicable if the field's help text is entered in Administration > Label Settings > Legislative Files > enter Help Text

>>Next Section: Agendas Settings

Personal Settings Menu - Agendas

Complete the following steps from the Personal Settings menu:

Click **Agendas** on the accordion menu. The settings are described below.



Personal Settings - Agendas

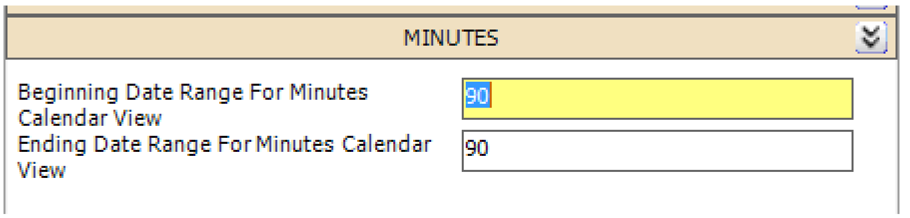
Item	Description
Beginning Date Range For Calendar	Sets a specific date range for displaying past agendas on the Legistar Home interface
Default Meeting Body	Sets the name of the default Meeting Body when you create a new Legislative File
Ending Date Range For Calendar	Sets a specific date range for displaying future agendas for the entered number of days on the Legistar Home interface

>>Next Section: Minutes Settings

Personal Settings Menu - Minutes

Complete the following steps from the Personal Settings menu:

Click **Minutes** on the accordion menu. The settings are described below.



Personal Settings - Minutes

Item	Description
Beginning Date Range For Minutes Calendar View	Sets a specific date range for displaying past minutes on the Legistar Home interface
Ending Date Range For Minutes Calendar View	Sets a specific date range for displaying future minutes on the Legistar Home interface

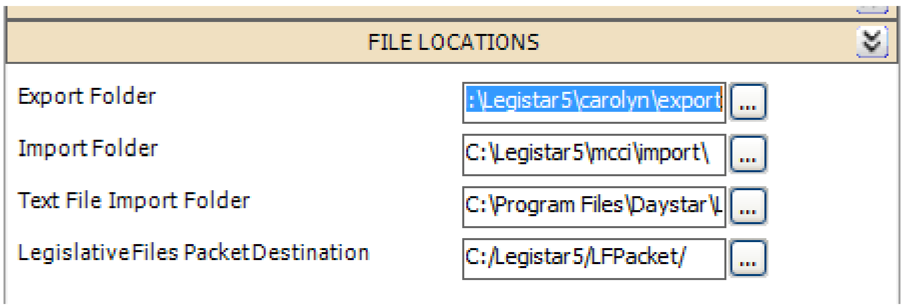
>>Next Section: File Locations Settings

Personal Settings Menu - File Locations

Complete the following steps from the Personal Settings menu:

Click **File Locations** on the accordion menu. The settings are described below.

Warning! Do not change these settings unless you are experienced with working in the directories and file locations.



Personal Settings - File Locations

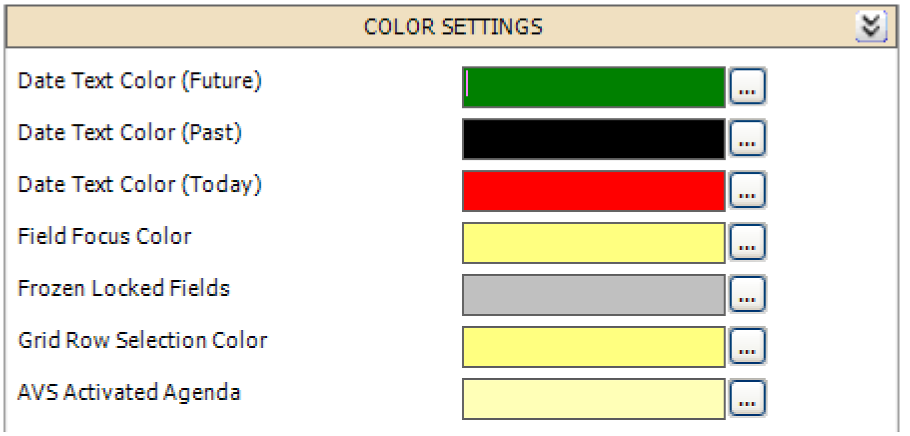
Item	Description
Export Folder	The set directory to which data is saved when you run a report and select the Save Report checkbox
Import Folder	The set directory from which you will import data; save your attachments here to import them into Legistar
Text File Import Folder	A default directory you can use for storing the text files you will import into Legistar
LegislativeFiles PacketDestination	The location where files are saved when you select the packet destination when running Legislative File reports

>>Next Section: Color Settings

Personal Settings Menu - Color

Complete the following steps from the Personal Settings menu:

Select **Color Settings** from the accordion menu. The settings are described below.



Personal Settings - Color Settings

Item	Description
Date Text Color (Future)	Fields containing future dates will display date text in the set color
Date Text Color (Past)	Fields containing past dates will display date text in the set color
Date Text Color (Today)	Fields containing the current date will display date text in the set color
Field Focus Color	The background color of any active field
Frozen Locked Fields	The background color of any locked field
Grid Row Selection Color	The field color for any selected rows
AVS Activated Agenda	Color of the active Agenda item within the Active Voting System module

>>Next Section: Laserfiche Settings

Using a Scanner with Legistar

You can set up Legistar to import scans directly into the system. Complete the following steps from the Home module:

1. Select **Tools** > **Local Settings** to open the Personalize Legistar screen.
2. Expand **File Locations**.
3. Enter the path to your scanner into the **Import** field.
4. Click **Save**.

Now, when you click **Scan** in the Files module, the Legistar system will automatically recognize your printer or scanner to grab the file.

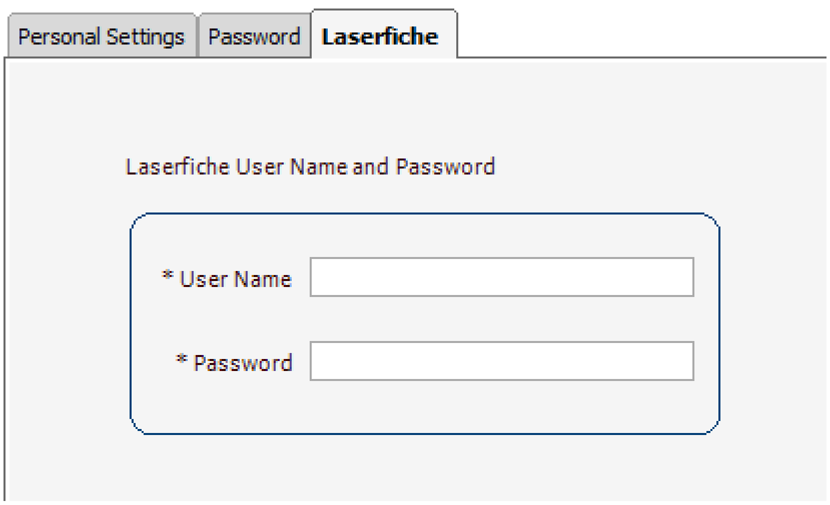
There are a few things to keep in mind when using this feature. It is very easy to produce scans with unwieldy file sizes if your scanner settings are photo quality. Attachments in Legistar are typically a working copy of the original, so photo quality/high resolution is usually not needed.

- It is generally best practice to set the **Quality** to either *Medium* or *Normal*
- **Resolution** should be set to at most 300 dpi
- Manually review the scan to ensure it is not producing unneeded or blank pages

Laserfiche Settings

If you have the Laserfiche - Legistar integration, you can save your Laserfiche username and password in the Personal Settings mene. Complete the following steps from the Personal Settings menu:

1. Click the **Laserfiche** tab.
2. Enter your Laserfiche **Username**.
3. Enter your Laserfiche **Password**.
4. Click **Save**.



Laserfiche Settings

>>Next Section: Pre-Agenda Approval in the Files Module

Pre-Agenda Approval in the Files Module

Legistar allows you to approve each agenda item as it is routed through the approval process. This section walks you through this process, as you prepare your agenda.

Use the Files module to draft legislative files, then route them through ATS. You can also run reports on and search for legislative files.

>>Next Section: Navigating the Files Module

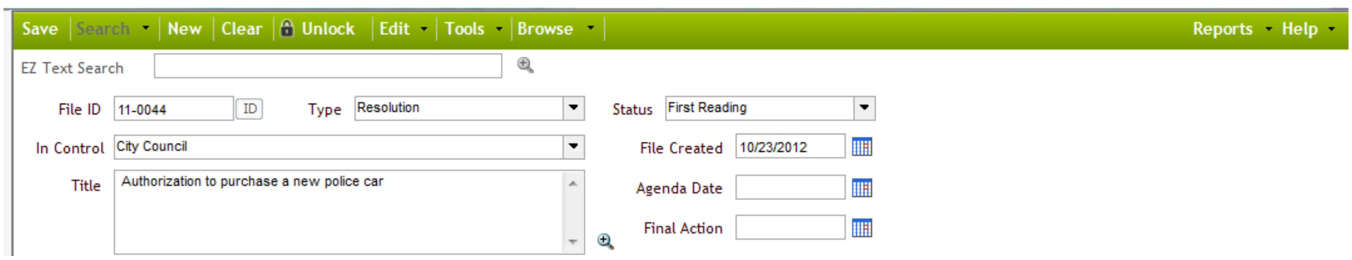
Navigating the Files Module

The following content walks you through the Files interface. Because many of the following features can be customized, they are described here in their default state and follow the standardized best practices set by the Legistar team.

The Files, Agendas, and Minutes interfaces are divided into two sections: Workspace and Tabs.

Workspace

The Workspace is located at the top of the Files, Agendas, and Minutes interface. The fields within the Workspace contain general information for the different record types and are editable by the user. The main Legistar features are accessible through the Workspace, though some of the available features will vary depending on the active module.



Workspace in the Files Module

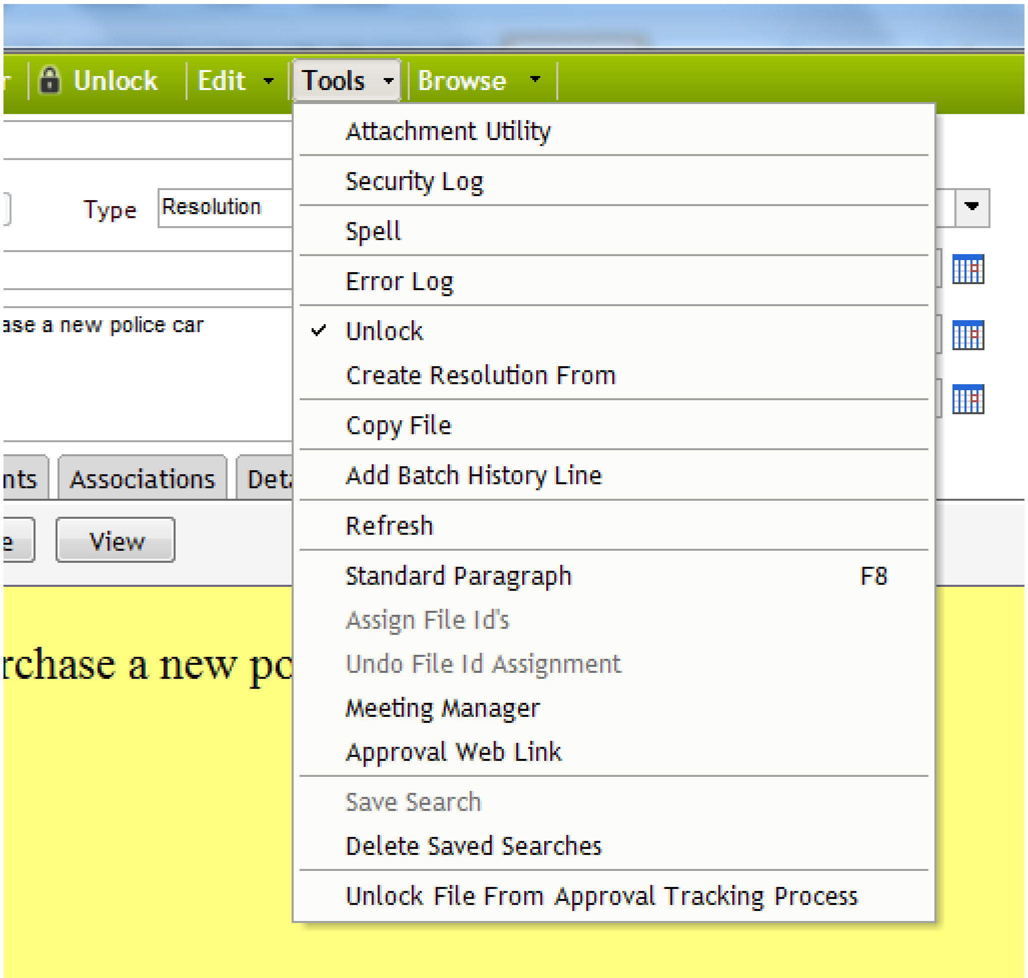
The following sections highlight the main fields within the Files Workspace.

Item	Description
EZ Text Search	Searches Legislative Files for the input text. Click the **Magnifying Glass** icon  to open a text box for further defining your search
File ID	Every Legislative File receives this unique file number. The System Administrator can change the format of the File ID via the Permanent and Temporary settings in System Administration

File Type	Identifies the type of Legislative File, such as an ordinance or resolution. This field searches for, groups, and reports on legislative files. More importantly, File Type places the legislative file in the appropriate place on the agenda per your setup in Administration
Status	Identifies what stage the file is at in the legislative process. The default status for new files is based on the user's personal settings. The Status also groups agenda items and is used for searching and reporting
In Control	Determines which legislative body is currently scheduled to meet and act on the file. In Control also determines agenda item order and works with security restrictions
File Created	The Date Introduced field is the date on which the file was created. This date can also be manually changed
Title	The Title field is the title of the legislative file's text. It is automatically populated with the text you input in the Title section of the legislative file
Agenda Date	Directs a legislative file to appear on a coordinating date-specific Agenda.
Final Action	Indicates the date the legislative file was completed and restricts a file from ever being included in an Agenda. The Final Action date is automatically assigned when an action is processed as a final action

Tools Menu in the Files Module

The following fields explain the different features within the Tools menu. Some of these features are exclusive to the Files module.



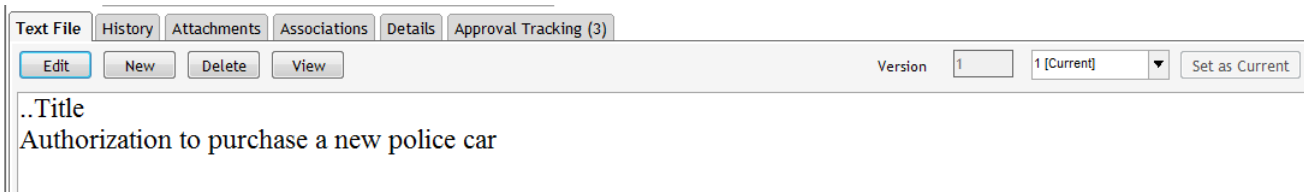
Tools Menu in the Files Module

Item	Description
Attachment Utility	The Attachment Utility tool allows you to manage the attachments that have expired according to the expiration date for each attachment
Security Log	Allows you to view a list of all changes made to the file, as well as the date and time on which they were made
Spell	The Spell tool allows you to spell-check the text fields of the file
Error Log	The error log is strictly for support purposes and will only be used under the guidance of a Legistar technical support representative

Lock / Unlock	The Lock tool allows you to lock a file, which disallows any changes until it is unlocked. This can also be done by clicking  . If the file is already locked, this option displays as  .
Create Resolution From	Creates a legislative file from a line added in an agenda
Copy File	Copies an existing legislative file
Refresh	Allows you to update the screen with any changes that may have been made by another user while it was open
Standard Paragraph	Allows you to open the Standard Paragraph screen, which stores commonly used sentences and paragraphs in one location
Assign File Id's	This feature allows for the automatic assignment of File IDs to items that have not yet been assigned File IDs
Undo File Id Assignment	Removes the file ID and sets to the next number in the Auto Number screen in Admin
Approval Web Link	Directs you to your personal ATS Internet approval webpage
Save Search	Option to save the search criteria entered for frequently used searches
Delete Saved Searches	Option to delete existing saved searches
Unlock File from Approval Tracking Process	Allows the System Administrator to make changes to the ATS file and place it on the agenda. Any of the data already processed will be stored

Tabs

The Tabs section is located on the bottom half of the Files, Agendas, and Minutes interface. This section contains more detailed settings and recorded information for the features within in the Workspaces section.



Tabs Section in the Files Module

Text File Tab

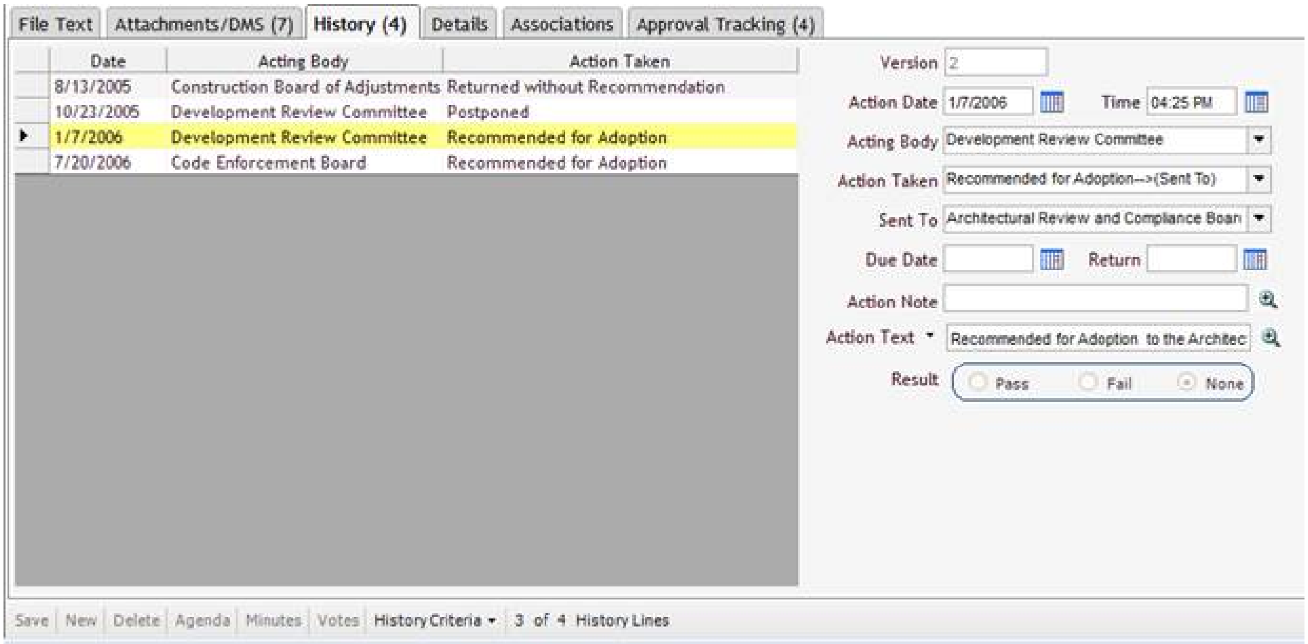
The Text File tab contains a text preview box and features for editing the text. However, you cannot directly edit text within the preview box; you must use the features to the right of the text preview box. These features are described below.

Item	Description
Edit	Opens the assigned text editor or Microsoft Word for you to make changes to the current version of the legislative file
New	Allows you create a new version of the legislative file
Delete	Allows you to delete the current version of the file text and go back to the old version
Version	Allows you to set the version of the legislative file
Version Lists	Displays the available versions of the file available for editing and review
Set as Current	Allows you to view and set an old version of the legislative file as the current file

History Tab

The History tab displays all actions (history lines) that have occurred for a legislative file, including Approval Tracking history. Any actions taken during a meeting will display here but cannot be edited; meeting actions must be edited within the minutes.

The following features describe the buttons along the History tab's bottom pane.



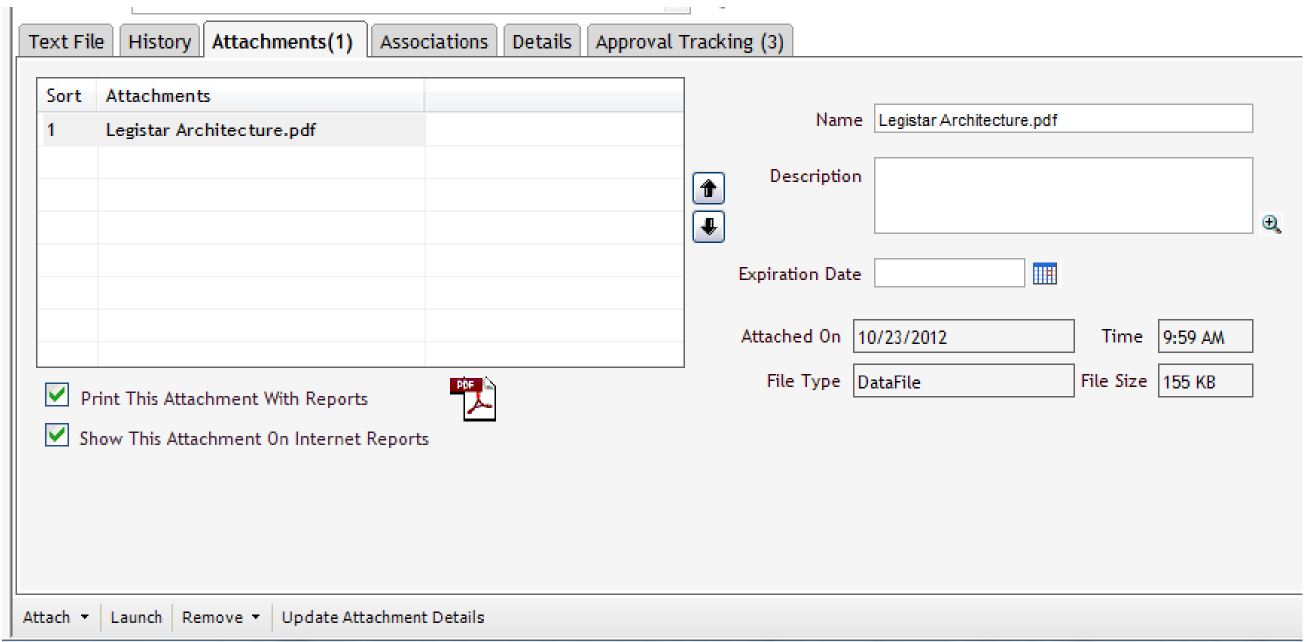
History Tab in the Files Module

Item	**Description**
Save	Allows you to save any changes made to a history line
New	Allows you to add a new history line and the actions for new files
Delete	Allows you to delete selected files
Agenda	Allows you to display the agendas associated with the selected history line
Minutes	Allows you to display the minutes associated with the selected history line
Votes	Allows you to view the votes taken on the selected history line

History Criteria	Allows you to change the criteria for the lines displayed. Options include the following: • Past Actions- Displays only history records on which actions have been recorded • Scheduled Meetings- Displays only history records on which no action has been recorded. This can include 30-Day rule items, items introduced at Roll Call, and items on agendas that have not had minutes recorded • Show All- Displays all history records
Version	Allows you to view the version of the file associated with the selected history line
Action Date	The date the action in the selected history line occurred.
Time	The time the action occurred. The time is important as history lines are sorted by the timestamp
Acting Body	The body that took the action
Action Taken	Motion made on the action
Sent To	The meeting body to which the associated legislative file was referred
Due Date	The date by which a response to a referral is required
Return	The date the legislative file was returned to the referring body
Action Note	Any text on the discussion of the legislative file
Action Text	The motion string of the action, generated by Legistar
Result	The result of the vote taken on the motion

Attachments Tab

The Attachments tab allows you to manage all supporting documents associated with a particular legislative file. Supporting documents can be of any file type or file size; these documents can also be added, deleted, annotated, and ordered within the Attachments tab. Attachments can include virtually any file format as well as on-the-fly scanned documents and links to outside sources of material, video, or other third party information and URLs.



Attachments Tab in the Files Module

Item	Description
Reordering Arrows	Use these arrows to reorder multiple attachments associated with a legislative file. Select the attachment > click the up or down arrows to rearrange the list of attachments
Name	The name of the file that appears on the InSite page and agenda (if enabled). By default, the file name entered into the name field
Description	Allows the user to enter information about the contents of an attachment
Expiration Date	The date the attachment becomes void. Entering a date in this field will not trigger automatic deletion
Attached On	The date the attachment was added to the legislative file

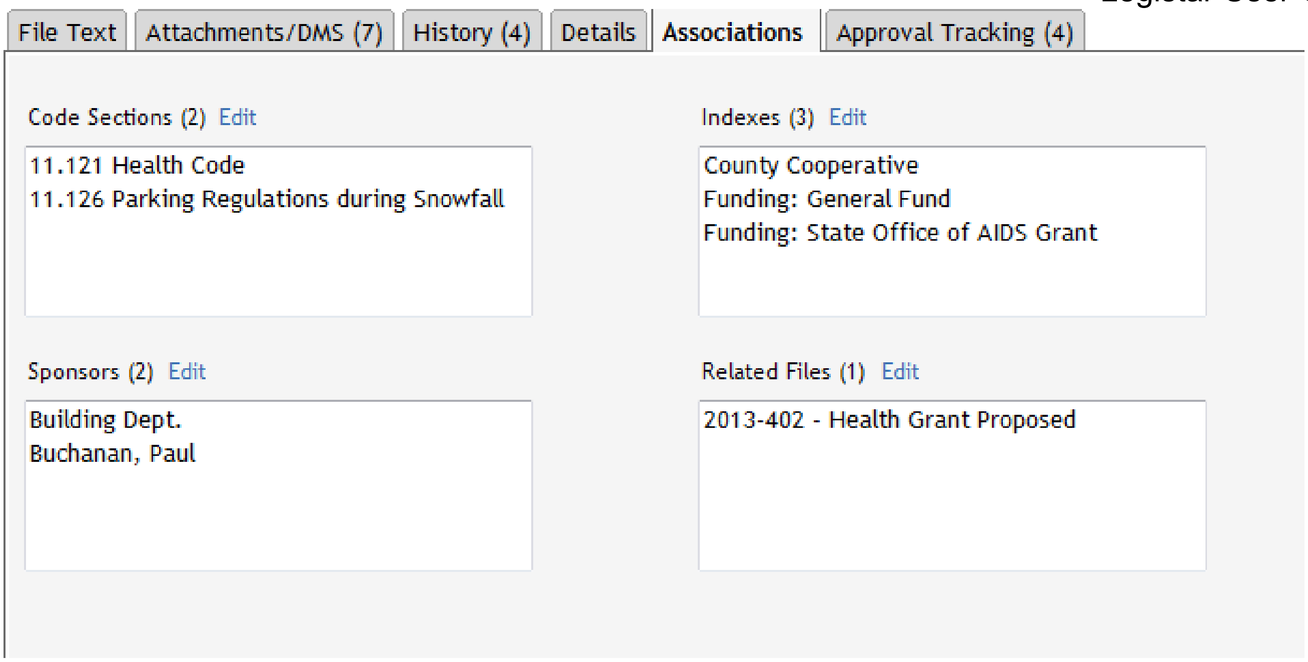
Time	The time the attachment was added to the legislative file
File Size	The size of the attachment
File Type	The file type of the attachment
Print This Attachment With Reports	Select this to print the attachment when creating an agenda packet or generating a report
Show This Attachment With Reports	Select this to print the attachment when creating an agenda packet or generating a report

The following features describe the buttons along the Attachments tab's bottom pane:

Item	**Description**
Import	Allows you to browse and upload a supporting document to add to a legislative file. Select Import to upload a file, hyperlink, or scan a document
Launch	Allows you to open an attachment in its original Windows application
Remove	Allows you to delete the attachment from the legislative file. Click the dropdown arrow for the option to delete all of the attachments associated with a legislative file
Update Attachment Details	After you rename or update the description and other attributes for an attachment, clicking the Update Attachment Details button changes the display on the left

Associations Tab

The Associations tab allows you to index and reference your legislative files by selecting features from a list of predetermined choices.

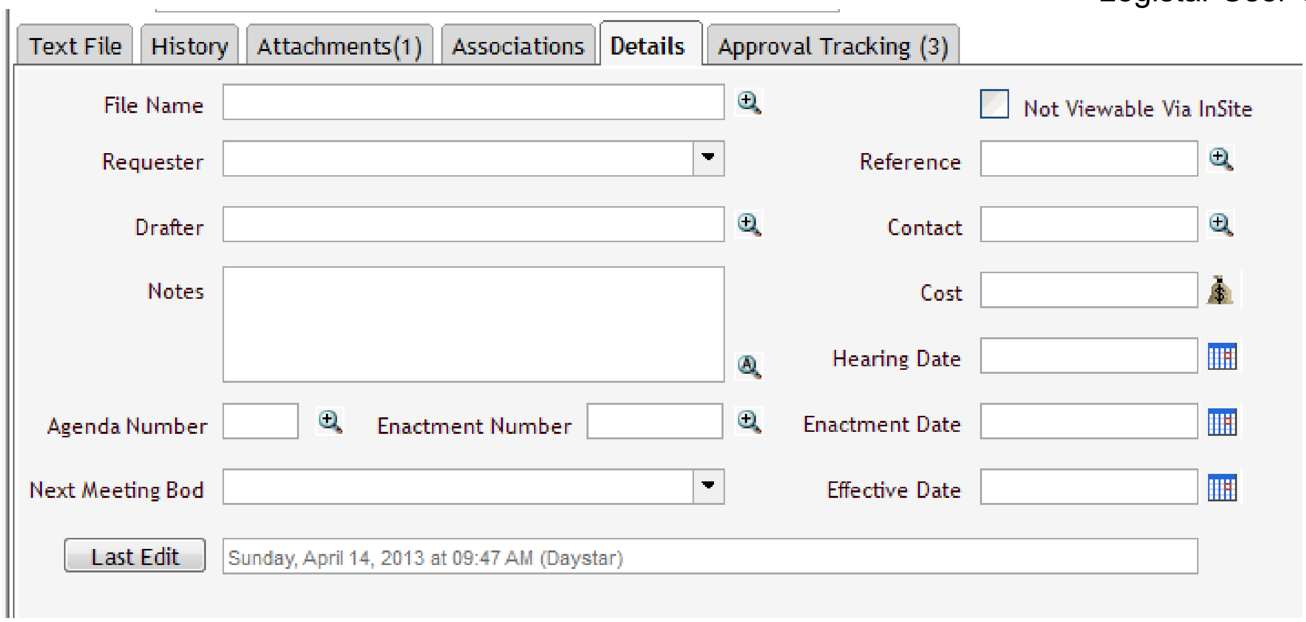


Associations Tab in the Files Module

Item	**Description**
Code Sections	Allows you to attach related code sections to a legislative file. You can create new, import, and edit existing code sections by clicking the Code Sections **Edit** button
Indexes	Assign indexes to a legislative file to relate the file to a specific topic. You can also create new and import indexes by clicking the Index **Edit** button
Sponsors	Assign sponsors (council members) for the legislative file. Click the Sponsors **Edit** button to assign sponsors and mark them as primary or secondary. To create a new sponsor, you must go to **Tools** > **Administration** > **Government Bodies** > **Bodies** or **Office Members** to create and set new sponsors for your legislative files
Related Files	Allows you to link related legislative files together to assemble a packet of legislative files. Click the Related Files **Edit** button to assign the files

Details Tab

The Details tab lists additional information about the selected legislative file. This information includes the file’s contact, notes, cost, hearing date, etc.



Details Tab in the Files Module

Item	Description
File Name	Name of the legislative file (Optionally, this may appear on the "Workspace" area)
Requester	The name of the department that requested the item
Drafter	The email address of the user who created the file
Notes	You can enter additional information about the legislative file in this field
Agenda Number	Displays the agenda number assigned during the agenda process. There can only be one agenda number and it must be the most recent number
Enactment Number	Assigned when an item is adopted. The EN is set up in Admin and assigned during minutes processing. There can only be one EN per file and typically the item is final when the EN is present
Not Viewable Via InSite	Determines if the legislative file is viewable on Legistar InSite. Selecting this checkbox overrides any status that typically determines if the file appears on InSite

Contact	Allows you to assign a primary contact person for the legislative file
Cost	Allows you to list any cost associated with the legislative file
Hearing Date	Displays the date on which the legislative file is to be heard in a meeting. The legislative file is not automatically added to the agenda until the hearing date. The hearing date is for reference only; it provides NO function
Enactment Date	Displays an automatically generated ID based on the enacted legislation
Last Edit	Identifies the last person who edited the file, the changes made, and when the change occurred

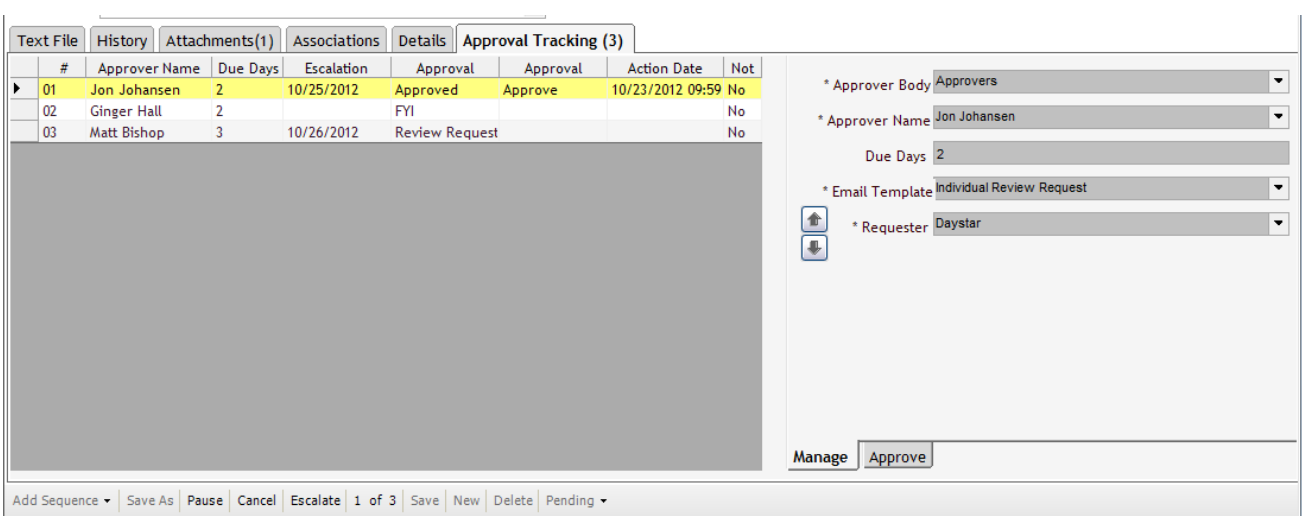
Info Tabs

The Info 1 tab (and the hidden Info 2 tab) display custom metadata for your solution. Both of these tabs can be hidden and contain customizable fields. You must customize the fields within Administration.

Warning! The fields in the Info tabs will not print on any reports.

Approval Tracking Tab

Within the Approval Tracking module you can set up numerous Approval Tracking sequences for each Legislative File. These sequences allow you to follow the drafting, editing, and approval of your Legislative File. This section of the program allows you to add sequences, start the approval process, and take approval actions.



Approval Tab in the Files Module

Item	Description
Approver Body	The body typically assigned for a certain type review or action
Approver Name	This is the name of the approver for a specific legislative file, required of each approval sequence
Due Days	The established number of days the approver has to review the legislative file. If the legislative file has not been approved within the set number of days, the file will be escalated to another individual
Email Template	Selects the type of approval requested, whether the person has to actually approve the file or if it is just an FYI file
Requester	This is the individual who is requesting the approval; this is different than the requestor listed under the Details tab
Manage	From the Manage tab (located at the bottom right-hand corner of the screen) you can add the ATS sequence and make changes in the order of the approvers
Approve	From the Approve tab (located at the bottom right-hand corner of the screen) you can enter notes, the file action, and delegate approvers
Reordering Arrows	Use these arrows to reorder multiple approvals associated with a legislative file. Select the approval > click the up or down arrows to rearrange the list of approvals

The following features describe the buttons along the Approval Tracking tab’s bottom pane:

Item	Description
Add Sequence	Creates the chain of approvals an item has to go through in order to be approved
Save As	Saves and adds a personal sequence
Start	Begins the Approval Tracking Sequence; when clicked, the first reviewer in the sequence is immediately notified
Cancel	Ends the Approval Tracking Sequence before it is complete. Anyone that has been notified to review the file will receive another notification that the sequence has been cancelled
Escalate	Causes the file to be sent to an alternate approver; this can happen manually or when the due date occurs
1 of 2	Displays the pending approval out of the total for review
Save	Saves the progress of the sequence
New	Starts a new sequence
Delete	Removes the approver from the sequence
Pending	Lists all the approvals you have waiting for review

>>Next Section: Attachment Utility

Attachment Utility

The Attachment Utility screen is reached through the tools menu in Legislative Files section. This form is used to manage the attachments that have expired according to the expiration date for each attachment.

To preview all the attachments that have met the expiration date, simply enter the date (it is most effective to use the less than sign) >8/12/04 and click on "Search" and the files will be listed in order in the top portion of the screen.

After you have found your desired attachments you can save them to a different directory then copy them to CD and/or batch print them. Then you can delete attachments that are expired or leave them for later if they are still needed.

Printing the Attachments before deletion

To print the attachments move them to the print job section by selecting them and clicking on the down arrow or the add all button.

>>Next Section: Drafting Legislative Files

Drafting Legislative Files

The drafting process in Legistar is the same for any type of legislative file you create. The steps in the process do not change, but the information you enter will vary. Legislative files may be drafted by many people on your team, but for simplicity's sake within the Legistar workflow, anyone who drafts files is called a “drafter”.

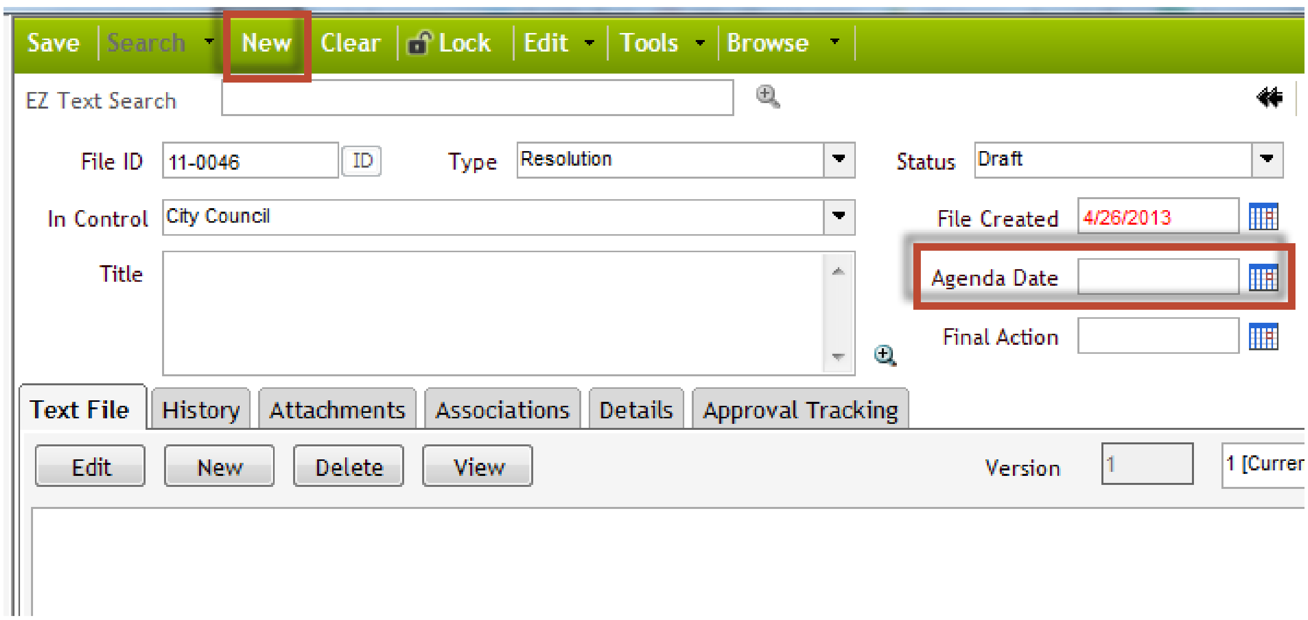
>>Next Section: Creating a New Legislative File

Creating a New Legislative File

When you open the Legislative Files screen from Legistar > Files, the screen will always open in Search Mode. When you click the New button the screen will automatically display in Record Mode. You can only edit fields within Record Mode.

The File ID, Status, Type, and In Control fields auto-complete with default settings. This default content is set in **Tools** > **Local Settings**.

1. Click **New** in the Legislative Files module. The other fields auto-complete to the default settings.
2. Select the **Agenda Date**, if known. The other fields auto-complete to the default settings when you click the New button.



Creating a New Legislative File

3. Click **Save.**

>>Next Section: Entering Legislative File Text

Entering Legislative File Text

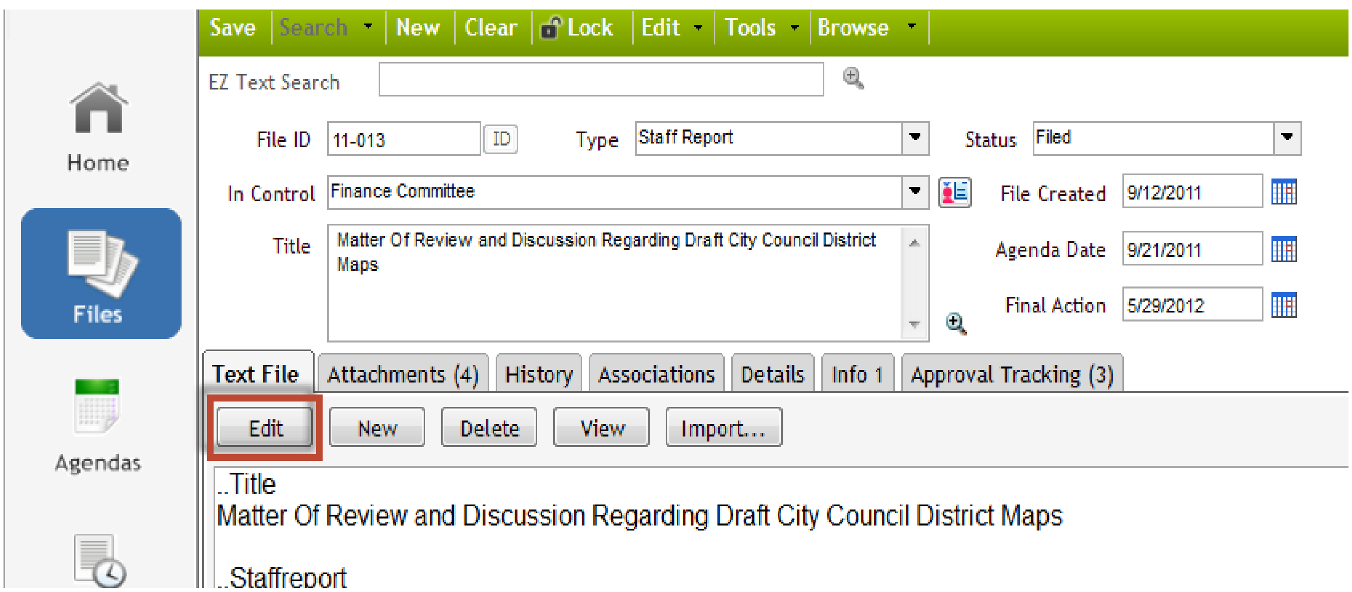
The Text File tab displays the text of the legislative file. When you create a new file, you have the ability to draft and format your file text in either the Legistar Drafting Editor or Microsoft Word. The following instructions explain both methods.

You don't have to create a legislative file from new text. You can import or copy and paste text.

Warning! To use Legistar's Text Editor you must set the **Use Microsoft Word for Text Editor** option to *NO* in **Tools** > **Administration** > **System Settings** > **Use Microsoft Word for Text Editor**.

Drafting File Text in the Legistar Text Editor

1. Click **Edit** under the **Text File** tab.



Edit Button on the Text File Tab

2. Confirm the Text Editor window opens.

3. Select one of the following methods to enter the legislative file text:

Method #1:

This is the preferred methods if you are using a predefined template or creating an on-the-fly draft with prepared text sections.

1. Click the **New** drop-down arrow **> Templates >** select a **template**. Templates are created and uploaded in **Tools** > **Administration** > **Legislative Files** > **Text File Templates**. A new record opens using the template you selected. If you use standard text for creating multiple file types, creating a template from the standard text will increase the efficiency of your legislative file drafting process.
2. Click the **File Sections** drop-down arrow > select a **section**. File Sections are created and edited in **Tools > Administration > Legislative Files > Text Sections**.
3. Enter your text in the text window under the ..File Section. You will replace the brackets and the inside text with your text.

Method #2:

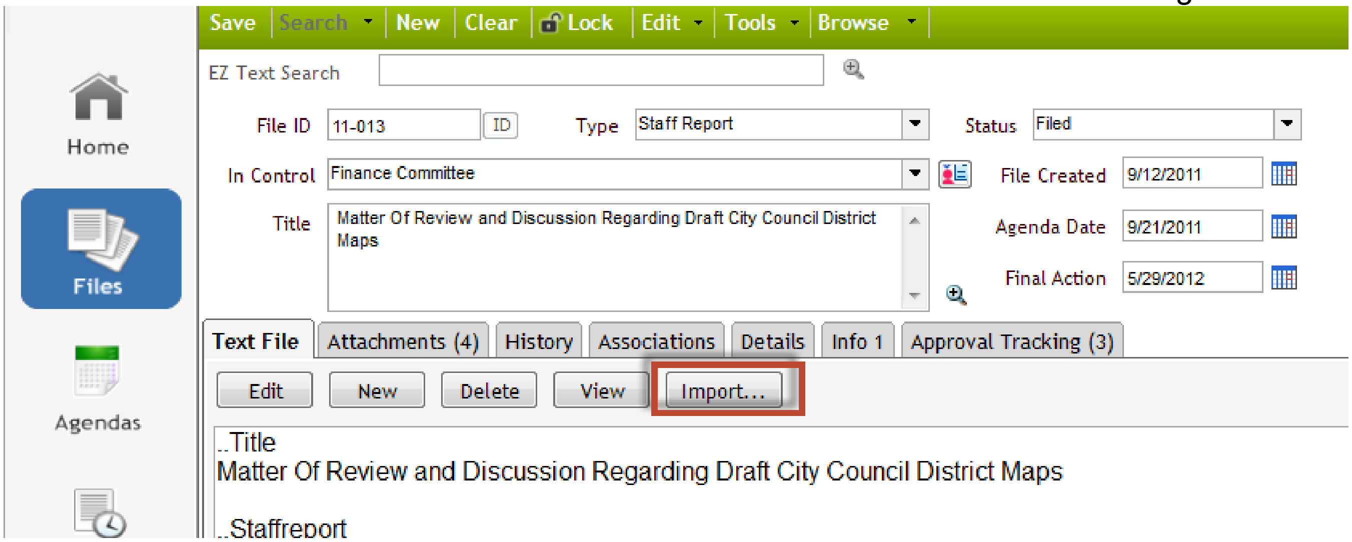
This is the preferred method when you are working from a pre-existing Word file, something that was drafted by someone else, or in another word processor such as WordPerfect.

1. Click **New**.
2. Click the **New** drop-down arrow > **Import File** > select a .txt or .rtf file > **Open**. The document you import must be an .rtf or .txt file and it must have the ..title and ..body sections identified.

Drafting Legislative File Text in Microsoft Word

If specialized text descriptions or sections are required, click the **File Sections** drop-down arrow > select a section and that text will be inserted. File Sections are created and edited in Tools > Administration > Legislative Files > Text Sections. Use the **Save File As** option to save the file as a new template.

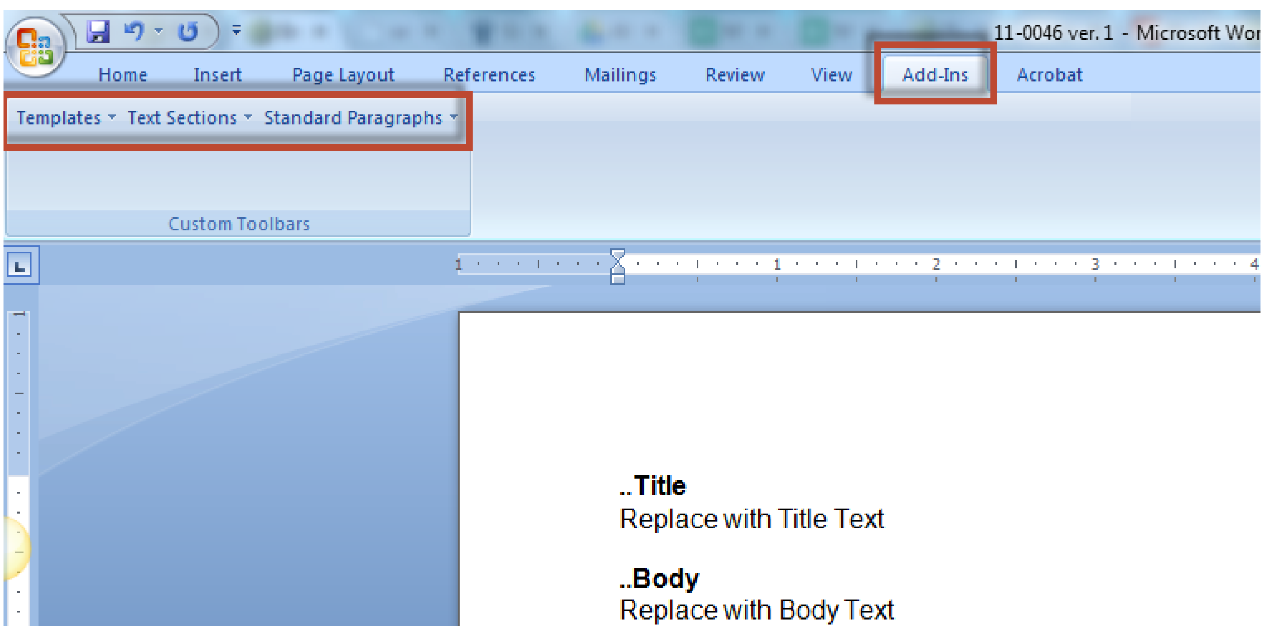
1. Click **Edit** to open the legislative file, or click **Import** to open an existing Word document on your computer.



Import Button on the Text File Tab

2. Confirm Microsoft Word opens. If the text file editor opens, see the warning above for instructions on setting up MS Word as your editor.

3. Look for the Legistar toolbar; it is either located on the bottom right-hand corner of the MS Word toolbar, or it is located under the **Add-Ins** tab.



Drafting in Microsoft Word with the Legistar toolbar

4. Select one of the following options to enter the legislative file text (the option you choose will be based on file type):

    a. Click the **Templates** button drop-down > select an .rtf or .txt file > **Open**.

    b. Click the **Text Sections** drop-down button > select one of the options.

    Text section labels are always prefixed with two dots. For example, Legistar recognizes the text that follows "..Title" as the descriptive paragraph for each file. Almost every standard report in the system uses this section to describe the content of the legislative file.

    System administrators may add as many text sections as required to organize the legislative text and associated information. For example, a requirement may be to include notes from staff in a new section called "..Recommended Action".

    Legistar always recognizes these text section labels, which are predefined in the system:

    - ..Title
    - ..Body
    - ..Recommended Action

    Notes: The ..Title and ..Body text section labels will print on the Text File, Certified Copy and Signature Reports. ALL other labels will only print on the Text File report.

    For LiveManager and iLegislate users: The ..Recommended Action text section label links to the**Suggested Action** field in LiveManager and iLegislate. You can select it in the checkboxes when running a report.
    When running reports on InSite, only the Text tab/Legislation Text report will display the ..coding.

a. Click the **Standard Paragraphs** drop-down button > select one of the options.

b. Edit and enter additional text until your file is complete.

c. Click **Save**.

Microsoft Word Editor Limitations:

When you use Microsoft Word as your editor in Legistar, while most formatting will carry over to Legistar properly, note that it may not appear in Legistar exactly as you have entered it in Word. This applies to the following:

- Rich text format (RTF) code attributes such as bolding, font style and color, underlining, bulleted and numbered lists.
- Indentation (Best practice is to use preset tabs)
- Pictures, Tables
- The Track Changes feature, which you use to record edits

Additionally, the Word Editor has the following limitations:

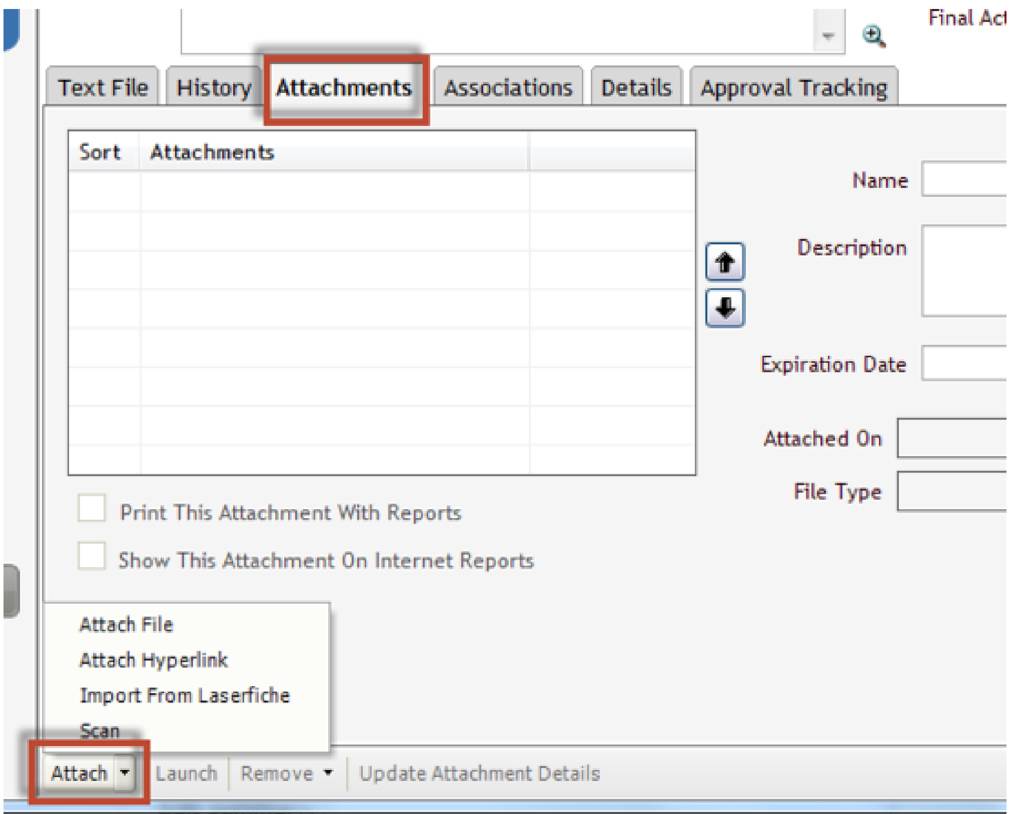
- You should not insert tables, graphics or images into the text file. Our best practice recommendation is that you include them as attachments.
    - The **..Title** section cannot accommodate graphics at all. The **..Body** section can accommodate small graphics, but for better results, we recommend you insert them as attachments.
    - Word documents that you add into Legistar cannot contain larger than 3MB worth of graphic data, as graphics that have a large file size will slow down the process of uploading the word document to Legistar. Therefore, the file size for graphics should be as small as possible.
- The Preview screen under the Text File tab is the least perfect replication of your formatting in the Word document. The Text File Report offers the closest replication of the Word document. When you are in the Files module, you can run this report by clicking **Reports** and selecting the report name from the Reports menu.
- RTF code cannot be larger than 100MB (this is not related to file size)
- You cannot use footnotes in the Word Editor

>>Next Section: Adding Attachments to Legislative Files

Adding Attachments to Legislative Files

You can add attachments of any file type and size to legislative files. Complete the following steps from the Files Module while drafting a legislative file in Legistar:
Warning! Attachment names should never include special characters (such as #, $, or ^).

1. Select the **Attachments** tab within the legislative files module.
2. Click **Attach** from the bottom left-hand corner of the interface.
3. Select the **Attach File**, **Attach Hyperlink**, **Import from Laserfiche**, or **Scan** option.



Adding an Attachment to a Legislative File

If you select...	Do this...
Attach File	Locate the file for import > click the Open button. **Note:** There are no limits on file size though larger files will take a little longer to attach.

	Note: If you attempt to attach an open Word document, the upload process is canceled, and an error message is displayed that instructs you to close the document before attaching it.
Attach Hyperlink	Enter a hyperlink in the field > click the OK button.
Import From Laserfiche	You may or may not see this option depending on whether you have the Laserfiche integration enabled.
Scan	1 Select a **source** from the Scan option > click the **OK** button. 2 Enter a **Description** and **Expiration Date**. (Optional) 3 Click **Save**.

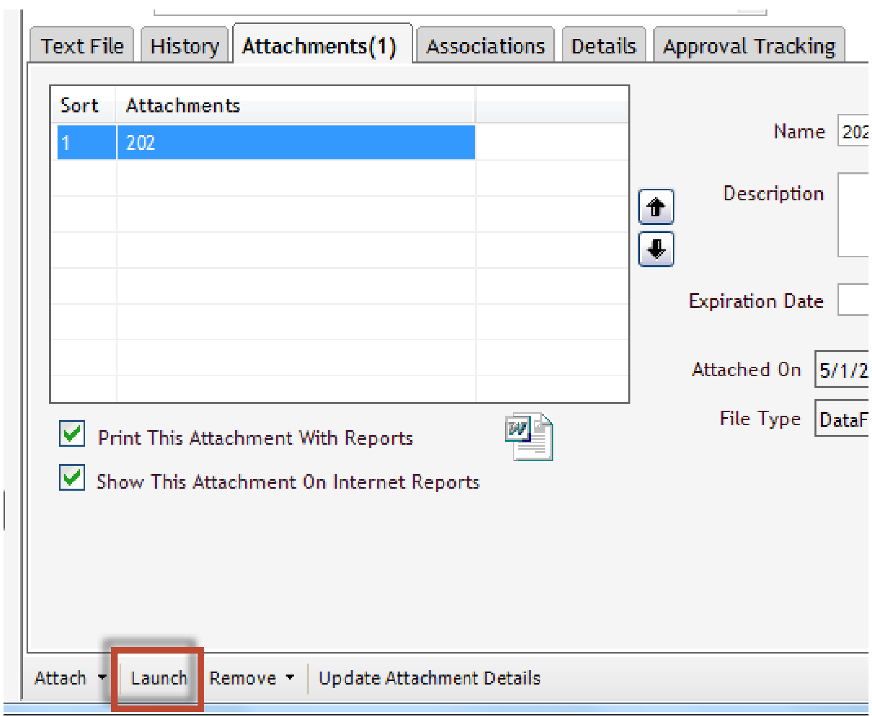
Tip for Success! If you need to delete a file, select the file and click **Remove**.

Managing Attachments

Attachments with an expiration date can be managed with the Attachment Utility tool in the Tools menu.

Opening an Attachment

1. Select an attachment from the Attachments menu.
2. Click **Launch** to open the attachment.

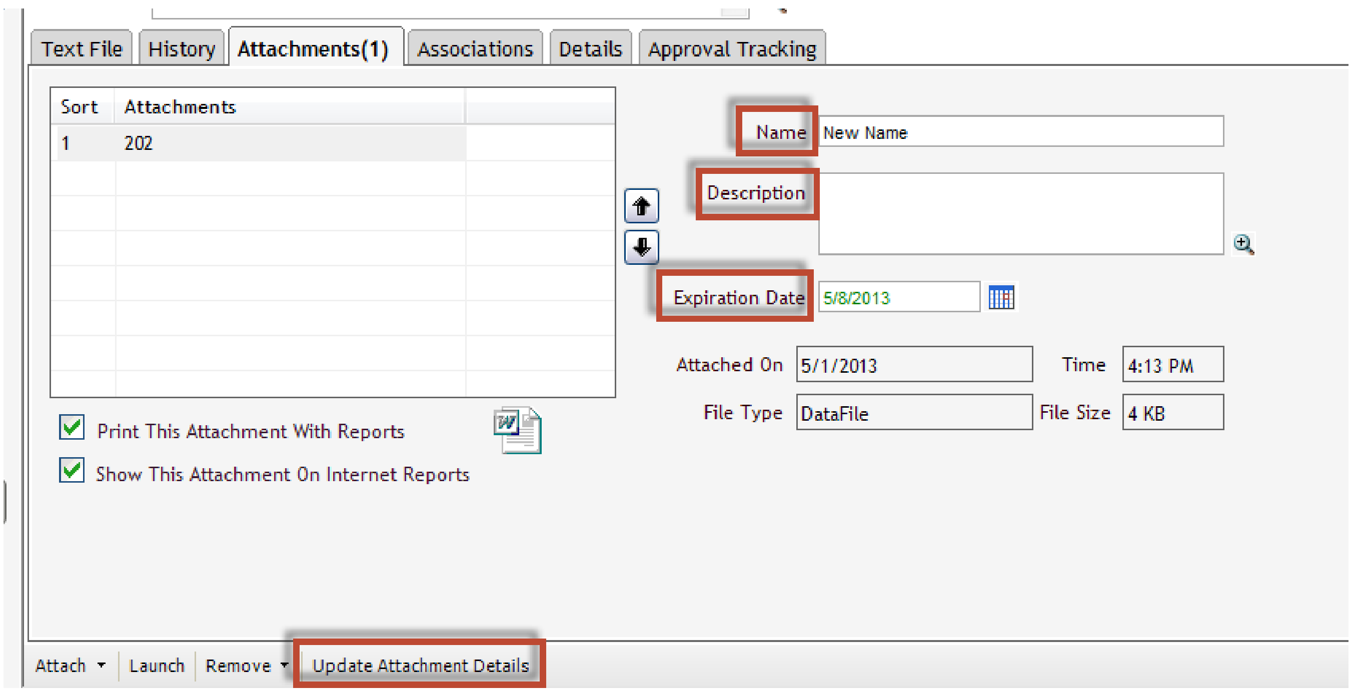


Removing an Attachment

1. Select the attachment.
2. Click **Remove**. You can also click the **Remove** drop-down arrow and select **Remove All** to remove all attachments from the legislative file.
3. Click **Save**.

Editing Attachment Properties

1. Enter a new name in the **Name** field.
2. Enter a description in the **Description** field.
3. Select a date from the **Expiration Date** field that will remove access to the attached file. The Expiration Date field may be hidden.
4. Click the **Update Attachment Details** button to update the fields with your new settings.



Updating Attachment Details

When running a report, you can only print the attachment when *Print* is selected as the **Destination** within the report interface.

To print attachments with the report, you must select both the **Print This Attachment with Reports** checkbox from the Attachments tab and the **Include Attachments** checkbox from the Destination section of the Reports interface.

To make your attachment available on InSite, select the attachment and select the **Show This Attachment on Internet Reports** checkbox.

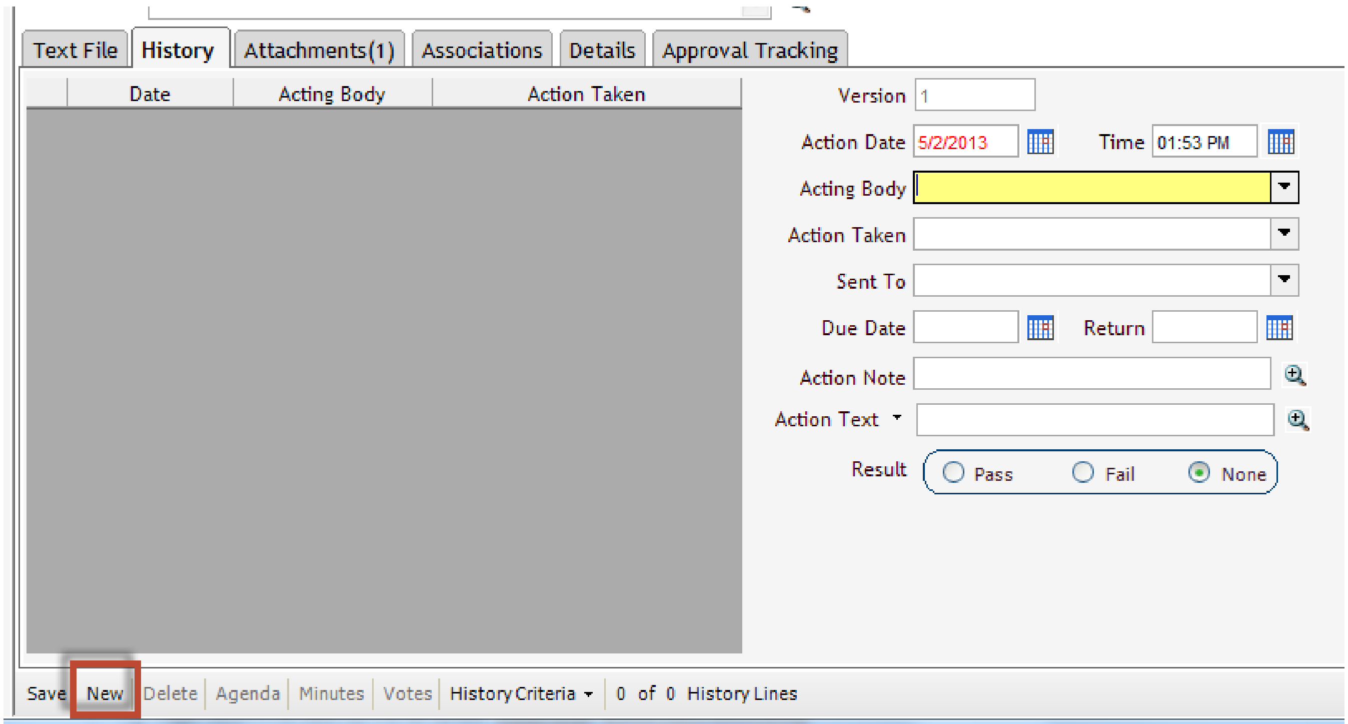
>>Next Section: Adding History Lines to Legislative Files

Adding New History Lines to Legislative Files

History Lines are automatically added when a file is acted on in a meeting. However, occasionally you will have to add a line manually. This situation typically occurs when you want to record an action taken outside of a meeting such as the Received and Assigned action.

Complete the following steps from the Files module in Legistar:

1. Open the legislative file. See Searching for Legislative Files for instructions on finding a file.
2. Select the **History** tab.
3. Click the **New** button at the bottom of the screen. (see figure below)



Adding a New History Line

4. Notice that the **Action Date** and **Time** fields auto-complete.
5. Complete the following fields and then click **Save**.

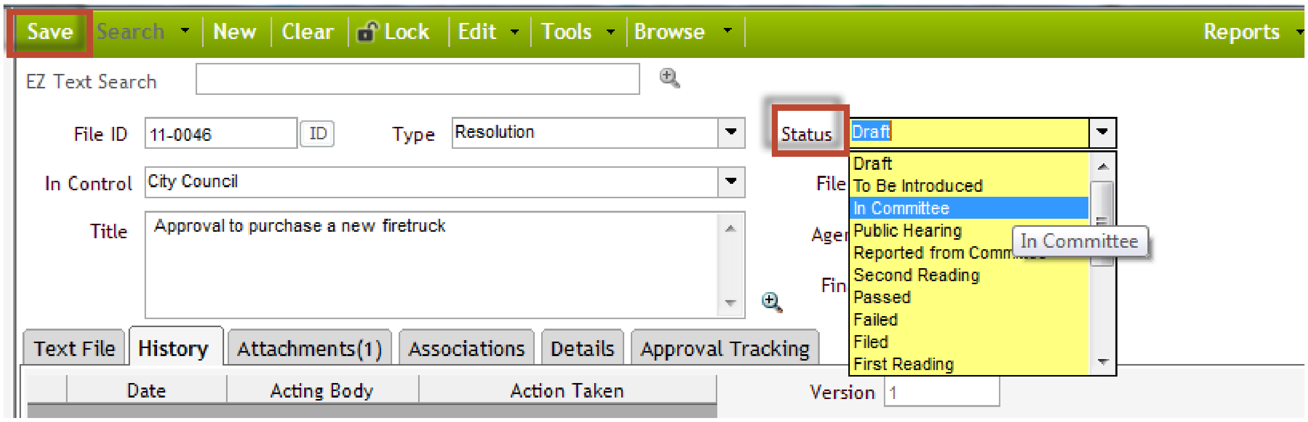
Field	Description
Action Date	The date the action in the selected history line occurred
Time	The time the action occurred; the time is important as history lines are sorted by the timestamp
Acting Body	The body that took the action
Action Taken	Motion made on the action

Due Date	The date by which a response to a referral is required
Return	The date the legislative file was returned to the referring body
Action Note	Any text on the discussion of the legislative file
Action Text	The motion string of the action, generated by Legistar
Result	The result of the vote taken on the motion

>>Next Section: Changing a Legislative File's Status

Changing a Legislative File's Status

1. Open the legislative file.
2. Select a new **Status** from the drop-down menu available.
3. Click **Save**. The next time an agenda is generated, the legislative file will display in the section associated with the status.



Changing a File's Status

>>Next Section: Checking Spelling on a Legislative File

Checking the Spelling of a Legislative File

You can run the Spell feature to check the spelling of all the text fields while drafting a legislative file in the text editor. Complete the following steps from the Files Module in Legistar:

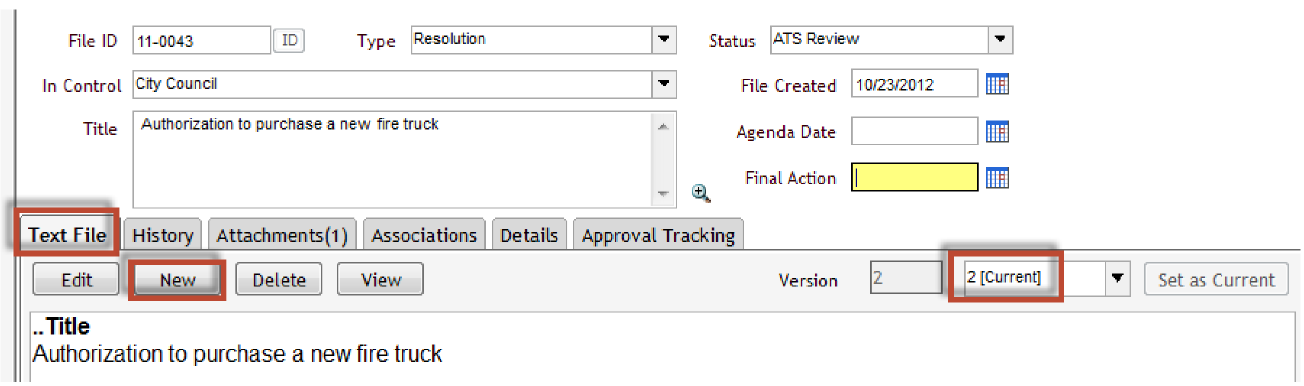
1. Click **Edit** within the Text File tab.
2. Click the **ABC** button to run the Spell feature.
3. Complete one of the following options from the Spelling Check window:
    a. Click the **Ignore** button to ignore the spelling of a word.
    b. Click the **Ignore All** button to ignore all instances of the spelling of a word.
    c. Select the suggested correct spelling and select **Change** or **Change All** to change all instances of the spelling of a word.
4. Click **OK** at the Spell check complete window.

>>Next Section: Creating New Versions of Legislative Files

Creating New Versions of Text Files

Legistar allows you to track different versions of a text file. The current version of the text file is used when the file is added to the agenda.

1. Open the file for which you will add a new version.
2. Select the **Text File** tab > **New** button.
3. Click *Yes* at the prompt to copy the current file's content to the new version of the file. Select *No* if you want to start with a blank new version of the file.
4. Select Yes at the prompt if you want the new version of the file to contain the same sponsors as the previous version.
5. Confirm the version field changes to reflect the new version, i.e. (Current).



Adding a New Version of a File

6. Click **Edit** and edit the text of the file.
7. Click **Save** > **Go back**.
8. Click *Yes* at the prompt to replace the old title with the new title.

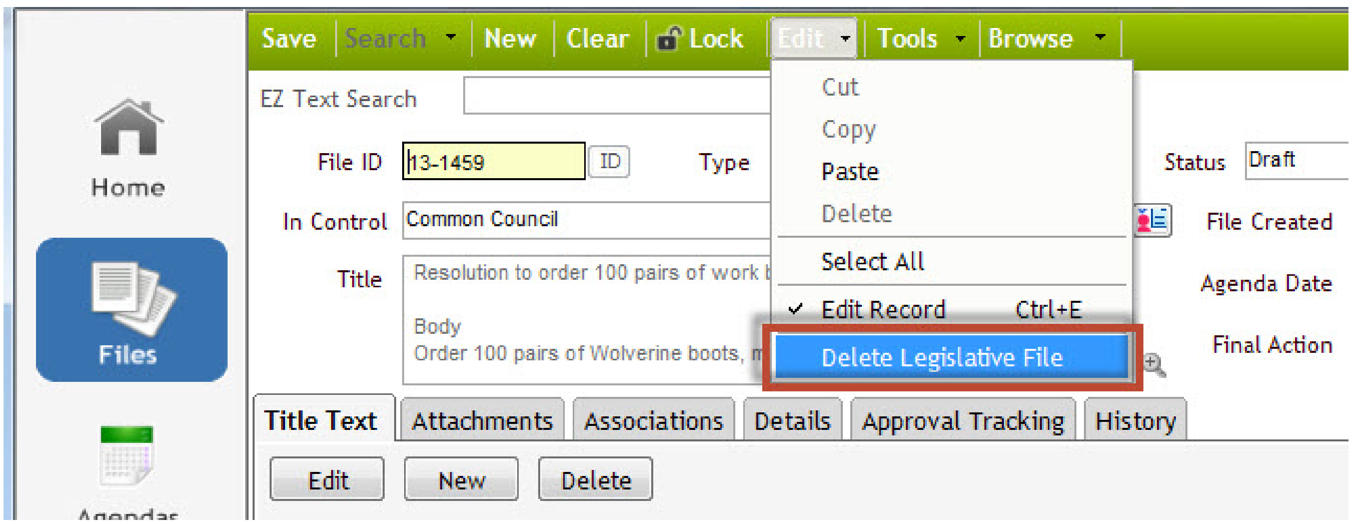
>> Next Section: Deleting a Legislative File

Deleting a Legislative File

To delete a legislative file from Legistar, complete the following steps from the **Files module** in Legistar:

Note: Legislative files must be removed from all meetings before they can be deleted. Because of this, in most cases it is better to simply remove a file from an agenda than it is to delete it from Legistar entirely.

1. Open the file you wish to delete.
2. Click the **Edit** menu.
3. Select **Delete Legislative File** from the drop-down menu available.
4. Click **Yes** at the prompt.



Deleting a Legislative File

>>Next Section: Text Tips for Drafting Legislative Files

Text Tips for Drafting Legislative Files

The following tips will help you enter text efficiently, identify file sections, avoid potential errors, and produce effective agenda and minutes documents.

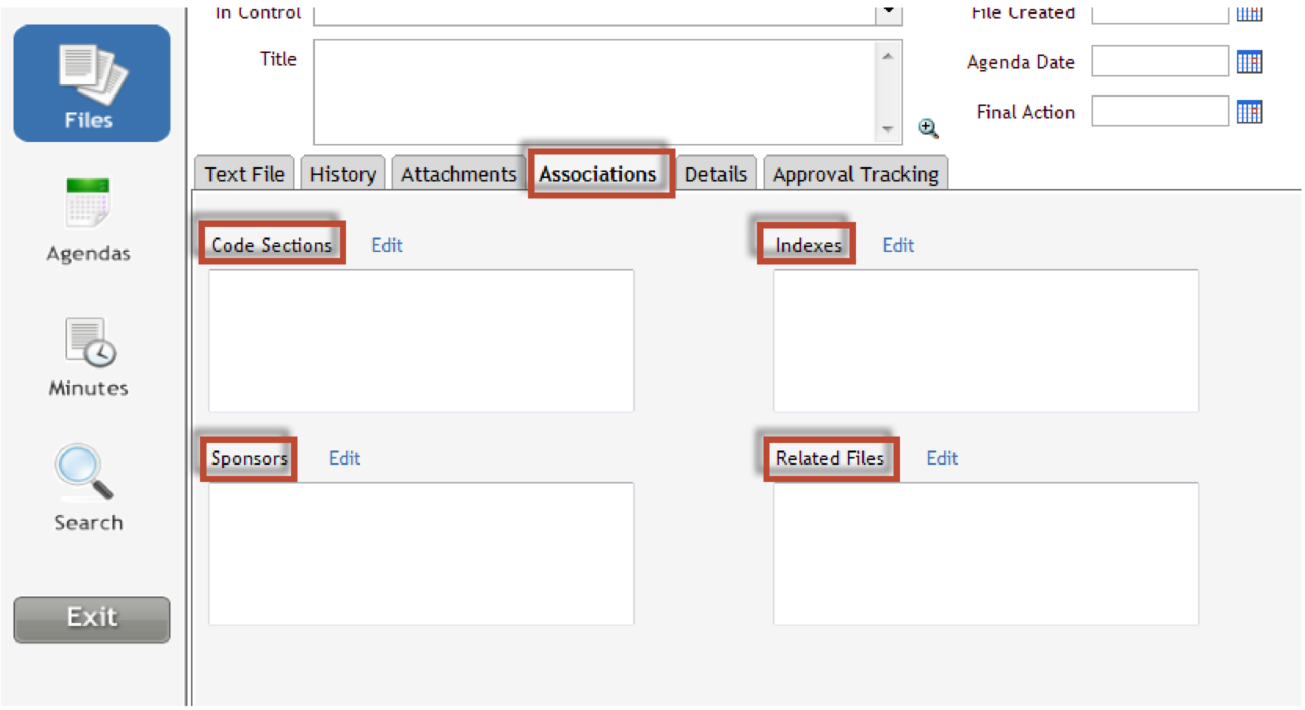
Item	Description
..Title	• Also referred to as the Agendas Entry • The...title file section is used on the majority of the Legistar reports. • Should not be more than a few sentences long • Keep the title strictly subject related, ex. “First Reading Ordinances” or “Second Reading Ordinances” • Do not delete the “..” before the file section title; this will cause the text to not display on the report
Formatting	• Do not enter any formatting in the file text window (for example, do not enter bullets, tabbing, or other placement items). If you must use formatting, use Microsoft Word to enter it
File Sections	• Do not use duplicate alpha characters in file sections, ex. you cannot have a section “.."title” and a section “..tax” • With the exception of the body text, you don’t have to use “..” before any file section title

>>Next Section: The Associations Tab

The Associations Tab

The list-to-list boxes on the Associations tab in the Files module allow choices from a list to be added as part of a Legislative File. The left side of the box lists available options which are controlled in the Administration tables by your System Administrator. The right side lists the users' selections.

Move the choices by selecting an item, then clicking the **arrow** key to move the item to the other side (multiple items can be moved by holding the **ctrl** key down while selecting each one) or by double clicking on the item. The double arrow will move all the items in the box. The up and down arrows arrange the listing of the selected choices only. This is used to designate the importance of sponsors.



The Associations Tab

When searching in a list-to-list box you can only search items that have been previously used. Below are the system categories which use list-to-list boxes:

Code Sections

The Code Section list-to-list box allows you to reference parts of your municipal code or Ordinances. This is very valuable when searching and you want to find every piece of Legislation that affects a particular section of code. This sections list is usually readily available from your codifier and is easily imported into the system.

Sponsors

Sponsors can be an individual or body who backs a particular piece of legislation. The primary sponsor is listed first, and the order can be changed using the up and down arrows. Sponsorship can change if a new version is created. Therefore, each version of a file can have different sponsors.

Sponsors are unique for each client, therefore Legistar offers you options in the choices that are available for sponsorship. In the Government Bodies (Main tab) of Administration you assign which individuals or committees are available for sponsorship.

Available Choices for Sponsorship

Members Only - Only the members will be available to be used as a sponsor.

Body Only - The entire body acting as one unit, the name of the body will be available to use as a sponsor.

Members and Body - The committee as a whole and each member will be available to use as a sponsor.

None - There will not be any choices in the sponsor list-to-list box.

Indexes

Indexes allow you to cross-reference a term or terms to a particular file. This can then be used as a valuable searching tool.

Related Files

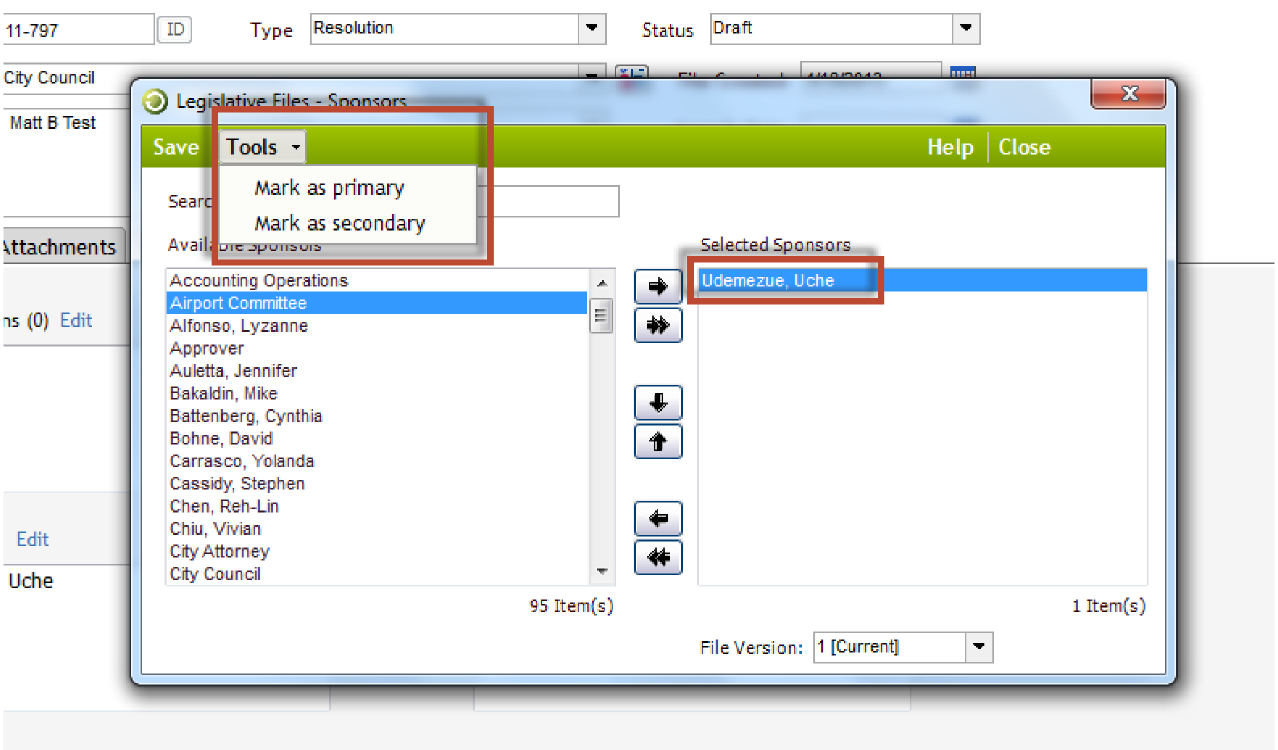
Related Files allow you to link related Legislative Files. Historically, we have found that this has been used for files that are part of a project, purchase order, or veto.

>>Next Section: Adding Sponsors to Legislative Files

Adding Sponsors to Legislative Files

Complete the following steps from the Files Module while drafting a legislative file in Legistar:

1. Click the **Associations** tab.
2. Click **Edit** next to Sponsors.
3. Select a sponsor from the **Available Sponsors** list.
4. Click the **arrows** to move and rearrange the sponsor in the Selected Sponsors list.
5. Select the primary sponsor from the list and select **Tools** > **Mark as Primary**.
6. Select the secondary sponsor from the list and select **Tools** > **Mark as Secondary**.
7. Select **Save**.
8. Click **Close**.



Marking Sponsors as Primary or Secondary

>>Next Section: Routing Legislative Files through ATS

Routing Legislative Files through the Approval Tracking Sequence

Most legislative files require review and approval prior to being added to an agenda. The Approval Tracking section allows you to submit these items for approval and regulate the entire approval process. The Approval Tracking Sequence is also known as ATS.

Approval Sequences are added in **Tools** > **Administration** > **Approval Tracking** > **Approval Master**.

Drafters begin the ATS process by selecting an approval sequence. Approvers can approve, delegate, disapprove, extend, and pause or cancel an approval tracking sequence.

You may also find these FAQs useful:

Approval Tracking in Legistar Cheat Sheet

Approver Cheat Sheet

Restarting a Disapproved Sequence

>>Next Section: Selecting an Approval Tracking Request (Drafters)

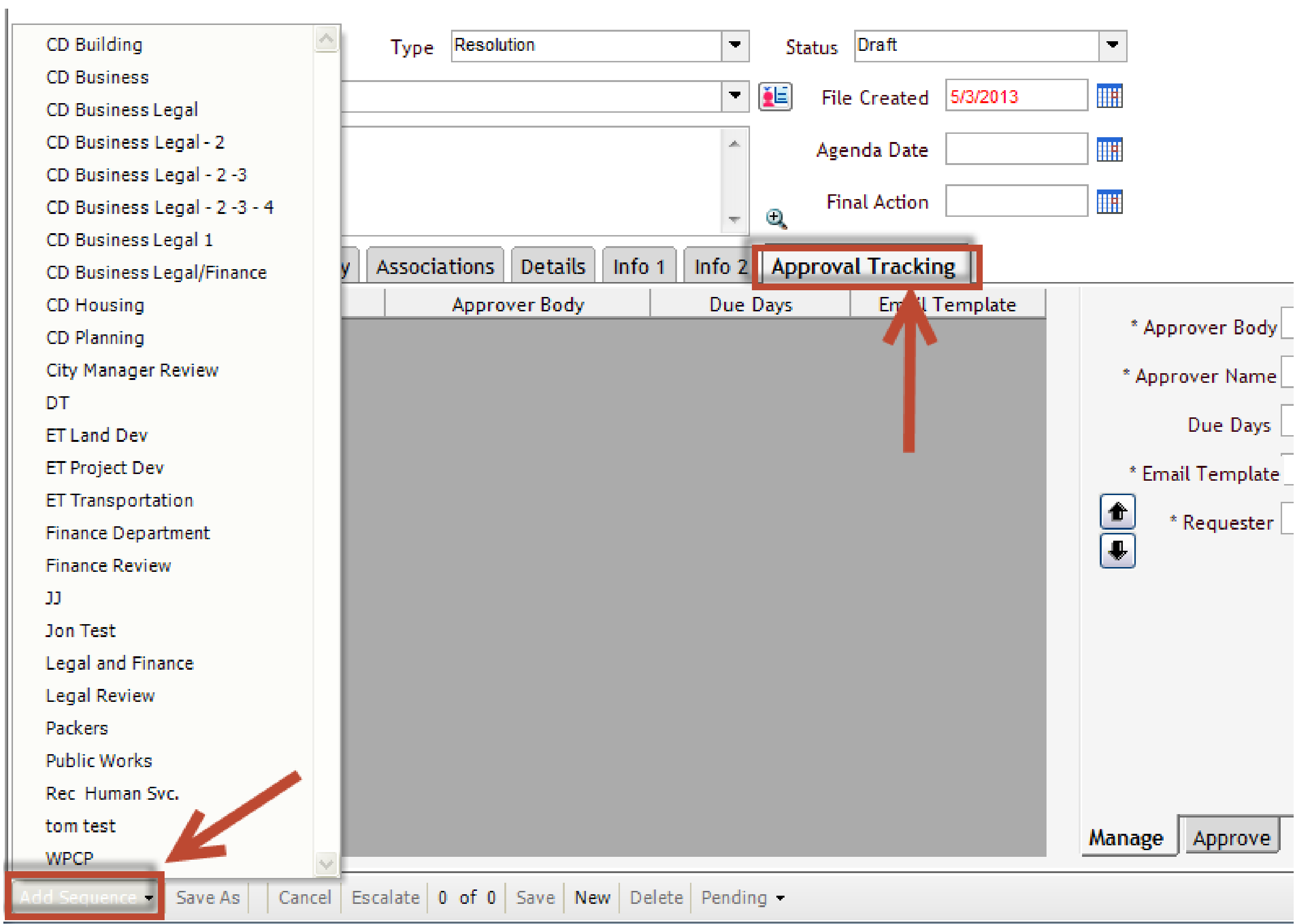
-or-

>>Next Section: Locating your Files for Approval Requests (Approvers)

Selecting an Approval Tracking Request (Drafter)

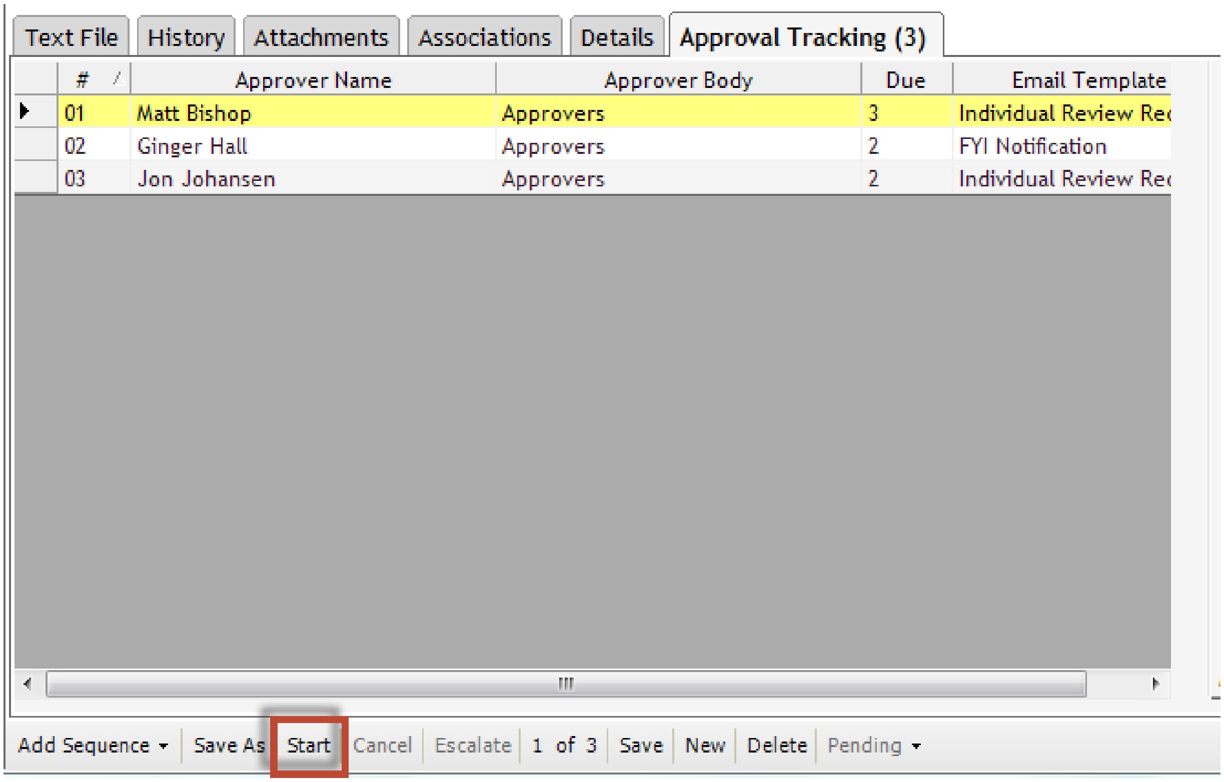
Complete the following steps from the Files module. You can also open a file from the Recent Files widget on the Home module.

1. Open a legislative file and verify you are in Edit Record mode.
2. Select the **Approval Tracking** tab.
3. Click the **Add Sequence** drop-down button and select an Approval Sequence from the menu available.



Adding a Sequence

4. Click **Start**. After you start the Approval Tracking process, the file can only be edited by the Assigned Approver and the Approval Requester until the Approval Process is complete.



Starting the Sequence

5. Confirm the names on the sequence which includes the Escalation Date and the Approval Status appear in the Tools window after you begin the sequence.

6. Confirm the file status changes to *ATS Review* and an email has been sent to the first approver of the sequence.

>>Next Section: Locating your Files for Approval Requests (Approvers)

Locating Your Files for Approval Requests (Approvers)

The files awaiting your approval are listed on the home screen under **Approval Requests**, or select the file from the **Pending** dropdown button within the **Approval Tracking** tab.

Approving Requests in Legistar

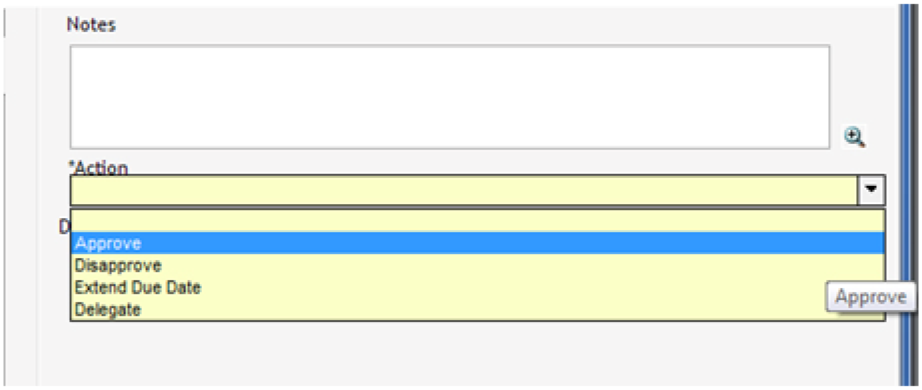
You can approve files both inside Legistar and though the web.

Legistar Approval Process

To approve a file using Legistar, complete the following steps:

1. From the **Home** module, select the file from the Pending list on the bottom right of the screen.
2. Review the **Type**, **In Control**, and **Agenda Date** fields from the top of the screen.
3. Click the **Text File** tab. If changes to the text are required, click **Edit** to access the text. Click **Save** to return to the Files screen.
4. Click the **Attachments** tab to review attachments. Make sure they are named appropriately.
5. Click the **Associations** tab to review any information there.
6. Click the **Details** tab and make sure the drafter correctly added a **File Name**, **Department**, and filled out any other necessary fields.
7. Click the **Approval Tracking** tab and select an **Action** (see figure below):
   - **Approve** – Sends the file to the next person in the approval process.
   - **Disapprove** – Sends emails to the drafter and anyone who already approved the item, informing them that you did not approve the file. Be sure to add a note explaining why you did not approve the file.
   - **Delegate** – Sends the item to another eligible approver. You'll need to fill in the Delegate field to the right of the Action field.
   - **Extend Due Date** – Gives you more time to consider the file by extending the due date.
8. Click **Save**. You will receive a prompt telling you that this action will freeze your ability to take action on this file in the future. This means you can only approve once and you cannot return to disapprove the file later. Click **Yes** to continue. This sends the file to the next person in the approval process.

Note: If you want to edit a file or add additional people to the approval sequence after sending it for approval, click the **Approval Tracking** tab and press the **Pause** button. This stops the approval process and allows you to modify the file.



Selecting an ATS Action

Web Approval Process

To approve a file using the web, complete the following steps:

1. Navigate to your organization's InSite web page by clicking the link in your approval notice email or by entering the web address in your browser: **<your site name>.legistar.com** (remember to leave off the "www")

2. Click **Sign In** in the top right corner. Legistar will remember you so you won't have to do this every time.

3. Click the **Approval Tracking** tab. If you don't see that tab, click the **My Accounts** link in the top right corner to pull it up. You may also need to ask your Legistar system administrator to enable the tab.

4. Click the **File ID** of the item you would like to approve.

5. Review the information on the screen.

    1. Make changes to the text if needed.

    2. Click **View** to review attachments.

    3. Click **Edit** to modify attachment names.

    4. If you make any changes to an existing attachment or need to upload a new attachment do so using the New Attachment button.

6. Change the text and upload new attachments if needed.

7. Enter any **Notes** if needed.

8. Select your approval **Action**:

    - **Approve** – Sends the file to the next person in the approval process.

    - **Disapprove** – Sends emails to the drafter and anyone who already approved the item, informing them that you did not approve the file. Be sure to add a note explaining why you did not approve the file.

    - **Delegate** – Sends the item to another eligible approver. You'll need to fill in the Delegate field to the right of the Action field.

    - **Extend Due Date** – Gives you more time to consider the file by extending the due date.

9. Click **Submit**.

>>Next Section: Delegating a File in ATS (Approvers)

Delegating a Legislative File in ATS (Approvers)

With the proper permissions, the approver can delegate the approval to someone else.

1. Select the **Approver** from the **Approval Tracking** tab.
2. Click the **Approve** tab.
3. Select **Delegate** from the Action dropdown menu.
4. Select an approver from the **Delegate Approvers** drop-down menu.
5. Click **Yes** at the confirmation window. At this point the requestor and new approver will receive emails about the delegation.

>>Next Section: Disapproving a File in ATS (Approvers)

Disapproving a Legislative File in ATS (Approvers)

If you select disapprove and enter notes on why you're disapproving the item, the status of the item will change back to draft. Emails are then sent to the initiator and approvers. After the initiator has received the disapproved file, they can make a new file version, add a new approval sequence, and re-submit the file.

1. Select the **Approver** from the Approval Tracking tab.
2. Click the **Approve** tab.
3. Select *Disapproved* from the **Action** dropdown menu.
4. Enter **Notes** explaining why you are disapproving the request.
5. Click **Save**.
6. Click the **Yes** button at the confirmation menu.
7. Confirm the file's **Status** changes to *Draft*.

>>Next Section: Extending an Approval's Due Date (Approvers)

Extending an Approval's Due Date

Approvers can extend the due date on any item sent. Selecting the Extend Due Date option will extend the due date by the set number.

1. Select the **Approver** from the **Approval Tracking** tab.
2. Click the **Approve** tab.
3. Select *Extend Due Date* from the **Action** drop-down menu.
4. Click **Yes**.
5. Click **Yes** again at the confirmation menu.
6. Confirm the new date is displayed on the approval line.

>>Next Section: Pausing or Canceling an Approval

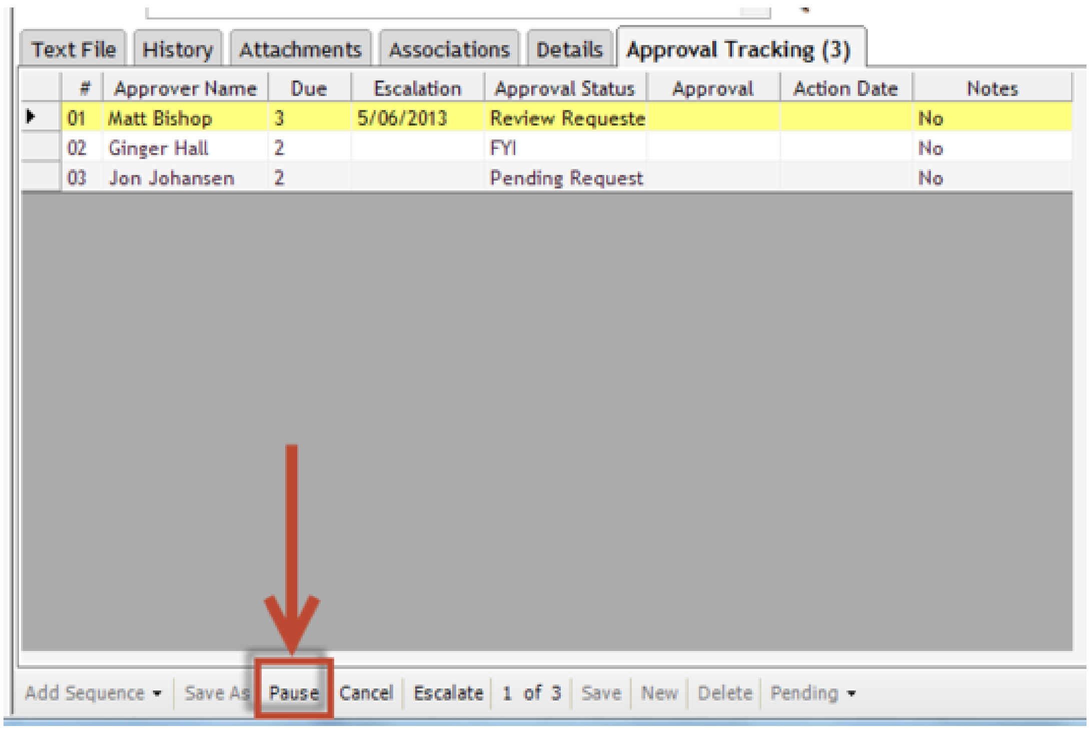
Pausing or Canceling an Approval (Clerks and Approvers with the Necessary Permissions)

Pausing an Approval

When you pause the Approval Sequence, emails are sent to each assigned approver to inform them of the pause.

Use pause in the instance you do not want the request to escalate.

1. Select **Pause**.
2. Confirm the status of the file changes. Emails are now sent to each assigned approval individual to inform them of the pause.



Pausing an Approval

Canceling an Approval (Clerks)

1. Select the Approver from the Approval Tracking tab.
2. Click **Cancel**.
3. Click **Yes** at the Cancellation prompt menu.
4. Confirm the legislative file status changes to ATS Cancelled. At this point, the approver will receive an Approval Tracking cancellation confirmation email.

>>Next Section: Running Reports from the Legislative Files Interface

Running Reports from the Legislative Files Interface

You can run reports in Legistar to send your legislative file to InSite, PDFs, printers, email, Word documents, Laserfiche, and more.

To run a report on a legislative file, open the file and click **Reports** > select the type of report you wish to run. These report types are covered in detail in the following sections:

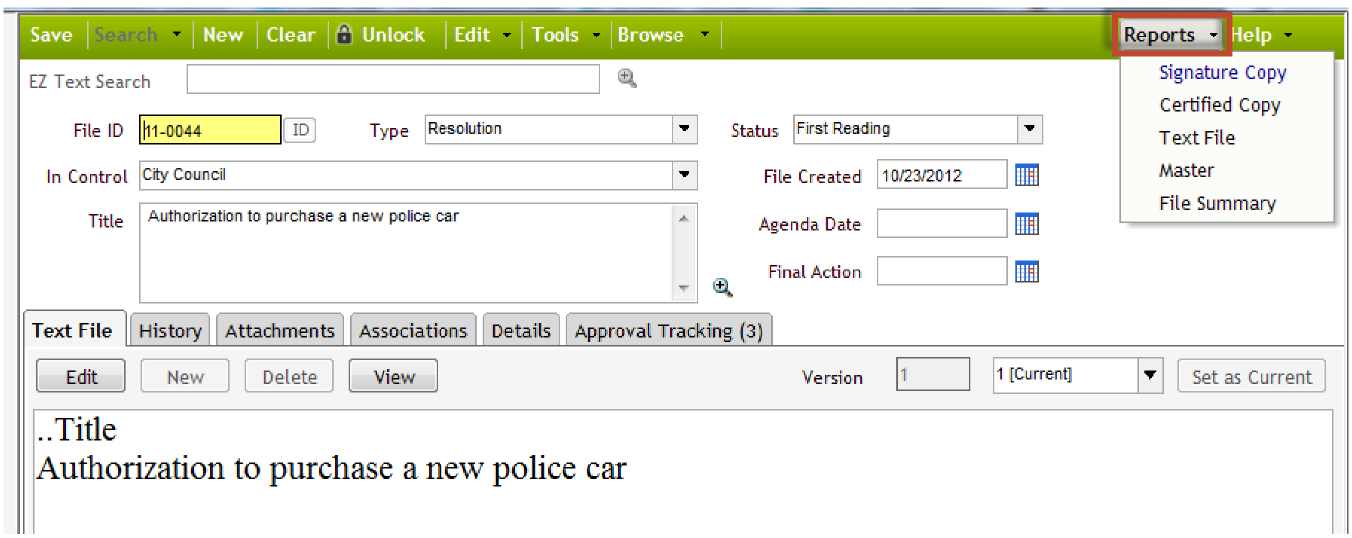
Running a Certified Copy Report

Running a File Summary Report

Running a Master Report

Running a Signature Copy Report

Running a Text File Report



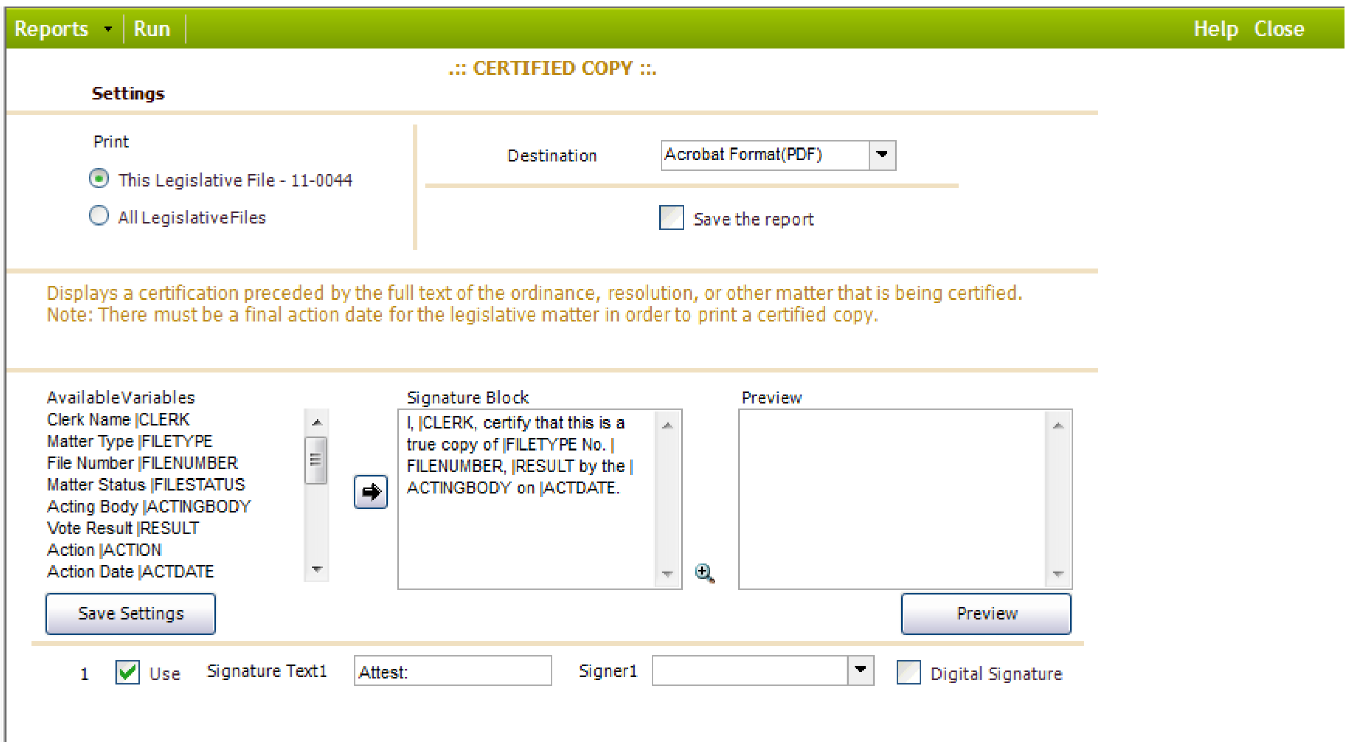
Running a Report from the Legislative Files Interface

>>Next Section: Running a Certified Copy Report

Running a Certified Copy Report

The Certified Copy report provides file text and information for distribution to the public. This report would most likely be run after a file has been passed at a meeting.

1. Select **Reports** > **Certified Copy**.
2. Review the Certified Copy interface.



Certified Copy Report

3. Configure the report settings as desired. These settings are described in detail below:

Setting	**DescriptionPrints the signature image uploaded in Administration**
Available Variables	A list of different variables you can add to the Signature Block; these variables contain information about the legislative file and its printed report
Signature Block	Pre-filled text that prints at the bottom of the report
Preview	A display-only field that allows users to view the signature block before it is printed
Use	The signature line that is included at the end of the report
Signature Text	The text that appears next to the report's signer. Should be the desired title for the signer

Signer	The signatory name that will appear for the signature line of the report. If left blank, the report will select the first name from the dropdown list
Digital Signature	

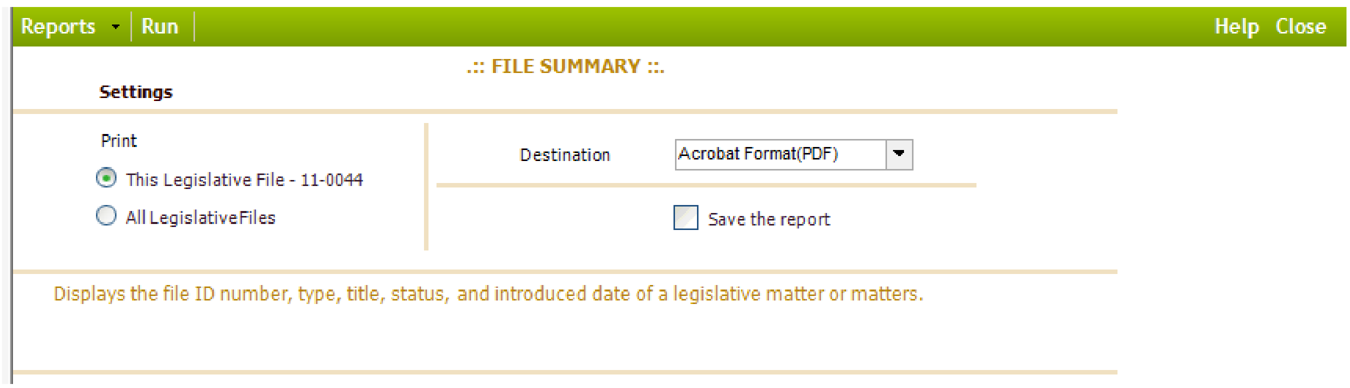
4. Select the **Print** and **Destination** options.
5. Click **Run**.
6. Click **Close**.

>>Next Section: Running a File Summary Report

Running a File Summary Report

The File Summary report only contains the basic data about a file. This report is useful if you want the results of the files found in a search.

1. Select **Reports** > File Summary.
2. Review the File Summary report interface.
3. Click **Run**.
4. Click **Close**.



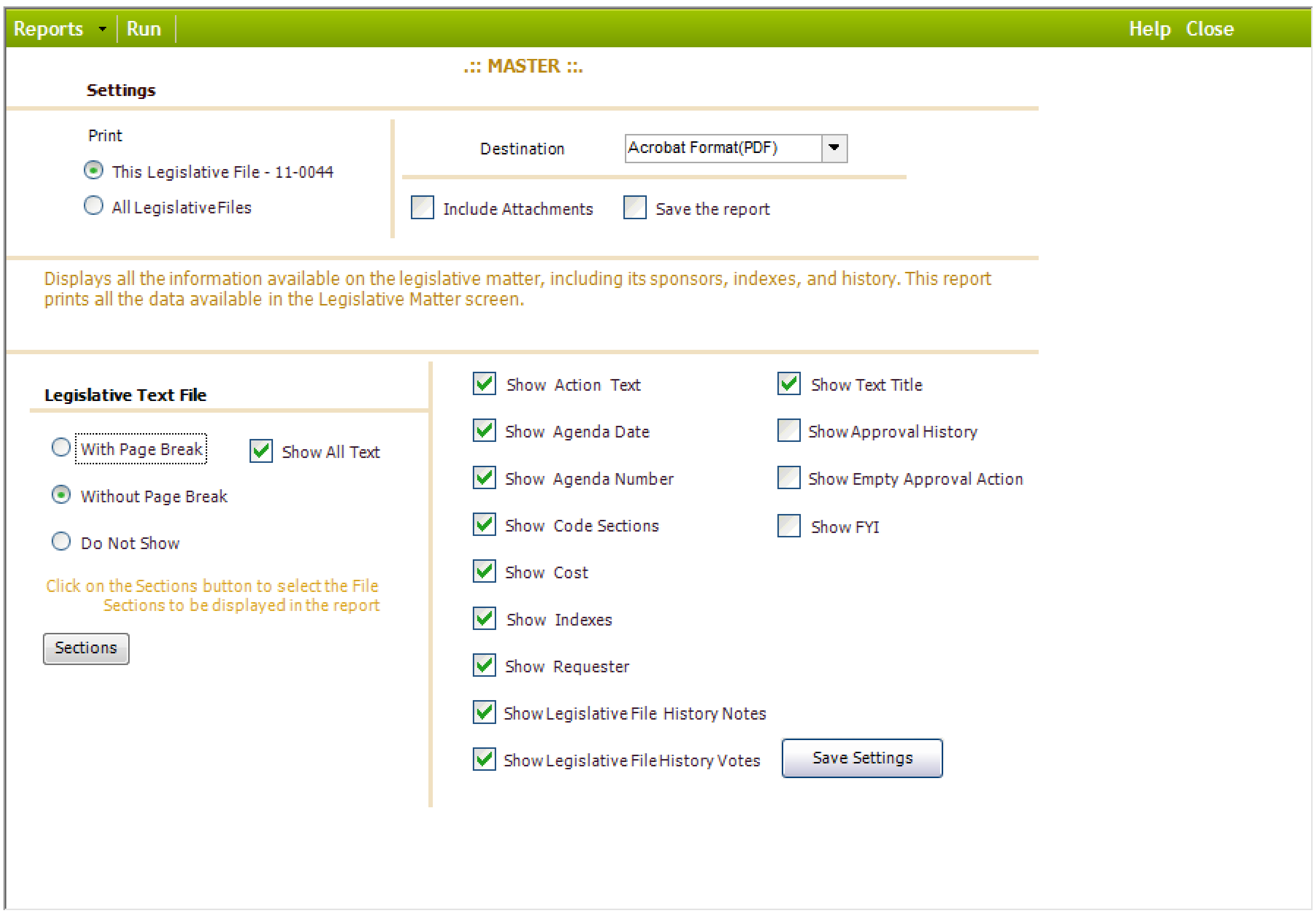
File Summary Report

>>Next Section: Running a Master Report

Running a Master Report

The Master report contains the File Number, File Type, Status, Enacted Number, Effective, Version, In Control, File Name, Date Introduced, Requester, Cost, Final Action, Comment, Title, File Text, and History.

1. Select **Reports** > **Master Report**.
2. Review the Master report interface.



Master Report

3. Configure the report settings as desired. These settings are described below:

Setting	**`Description**
With Page Break	Prints the report with the text printed on a second page after the Legislative File information.
Without Page Break	Prints the report with the text immediately following the History of the file.
Do Not Show	Prints the report without the text of the file.

Show All Text	Overrides the sections specified in the Sections portion of the criteria and print the entire text of the file.

4. Select the **Print** and **Destination** options.
5. Click **Run**.
6. Click **Close**.

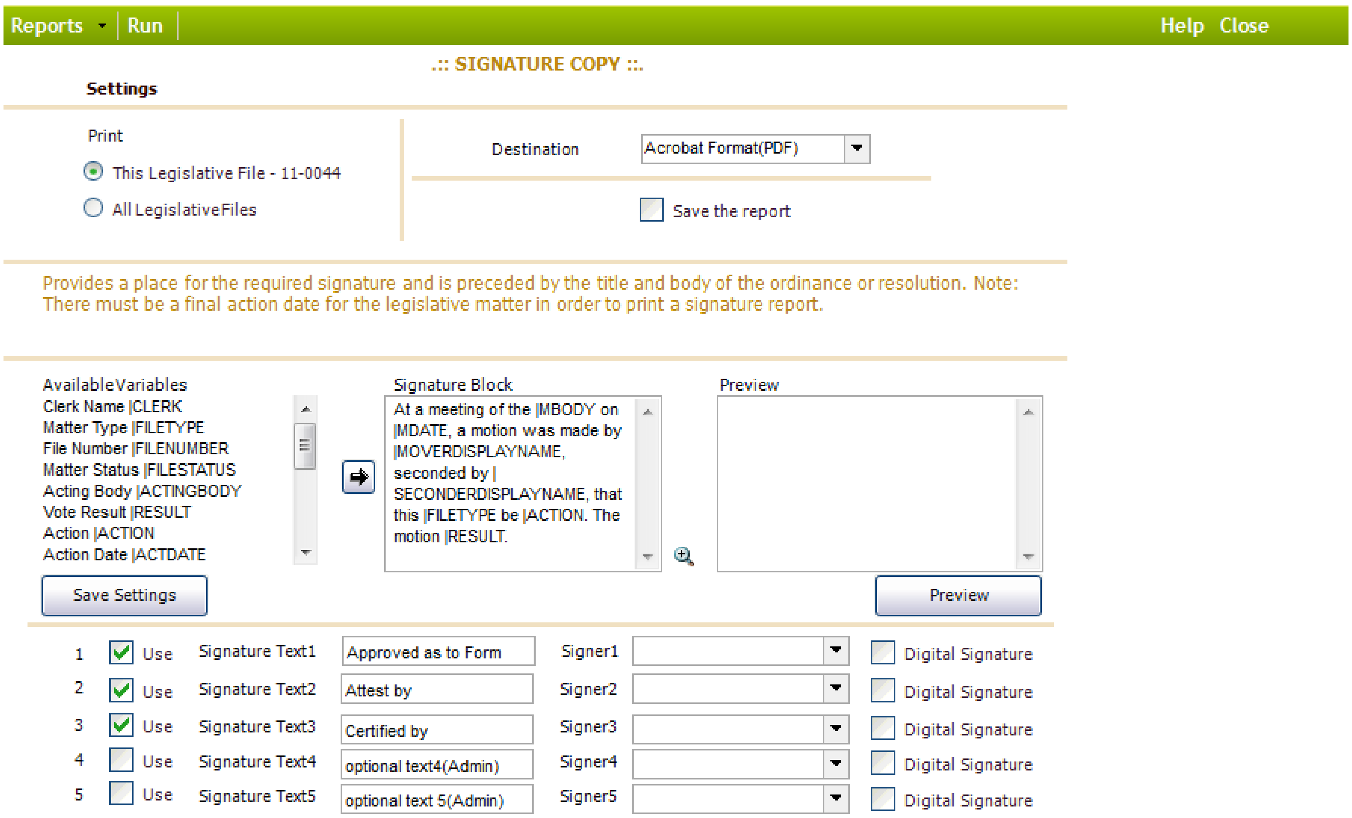
>>Next Section: Running a Signature Copy Report

Running a Signature Copy Report

The Signature Copy report provides a place to assign the required signatures and their preceding title and body of the ordinance or resolution. This type of report is most likely to be run after the file has been passed.

Note: There must be a final action date assigned for the legislative item in order to print a Signature Copy report.

1. Select **Reports** > **Signature Copy**.
2. Review the Signature Copy interface.



The Signature Copy Interface

3. Configure the report settings as desired. These settings are described below:

Item	Description
Available Variables	A list of different variables you can add to the Signature Block; these variables contain information about the legislative file and its printed report
Signature Block	Pre-filled text that prints at the bottom of the report

Preview	A display-only field that allows users to view the signature block before it is printed
Use	The signature line that is included at the end of the report
Signature Text	The text that appears next to the report's signer; should be the desired title for the signer
Signer	The signatory name that will appear for the signature line of the report. If left blank, the report will select the first name from the dropdown list
Digital Signature	Prints the signature image uploaded in Administration

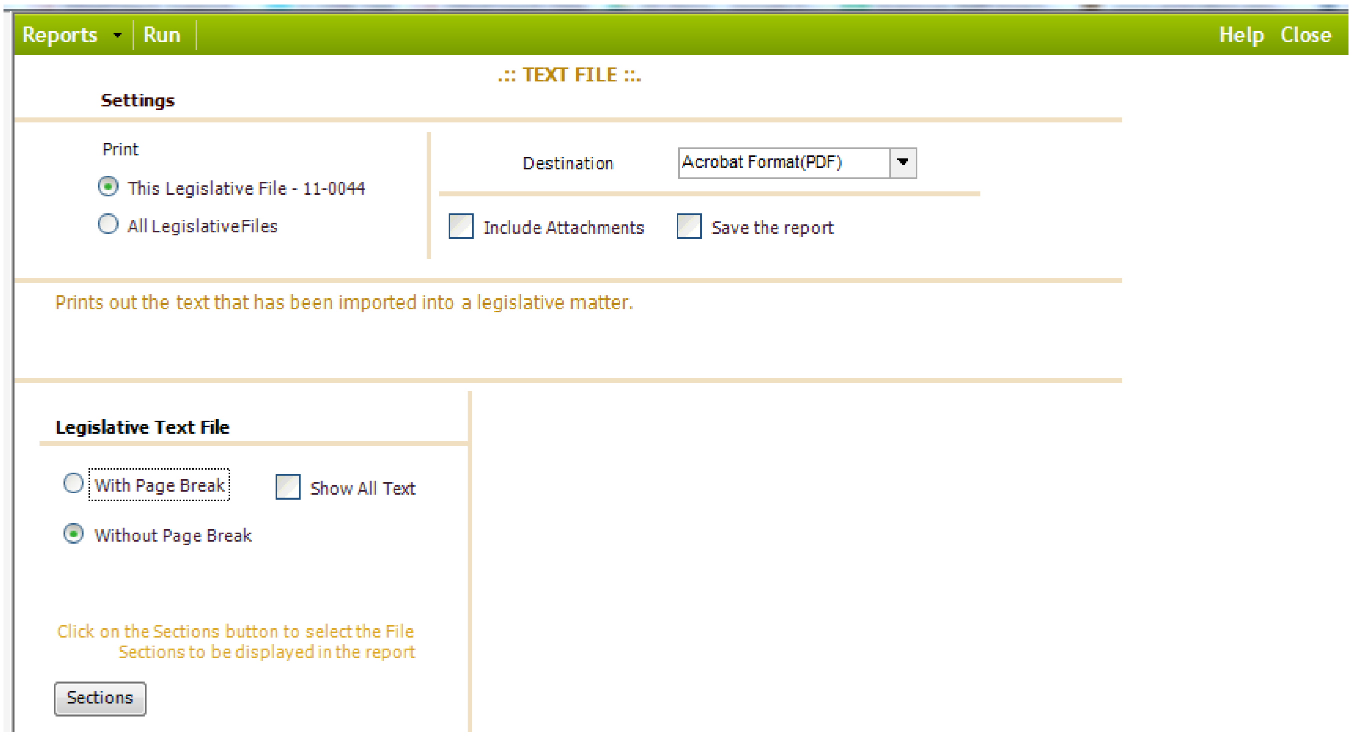
4. Select the **Print** and **Destination** settings. Select the **Save this report** checkbox if you wish to save your signature report.
5. Click **Run**.
6. Click **Close**.

>>Next Section: Running a Text File Report

Running a Text File Report

The Text File report prints the text of an item with little additional information. You can also select the specific sections to print. Print this type of report for a full text review of the legislation.

1. Select **Reports** > **Text File**.
2. Review the Text File Report interface.



Text File Report

3. Configure the report settings as desired. These settings are described below:

Setting	Destination
With Page Break	Select to print a copy of the report with the text printed on the second page of the legislative file information
Without Page Break	Select to print a copy of the report with the text immediately following the history of the file
Sections	Select to choose the specific file text sections you want to show in the report
Show All Text	Select to override the sections specified in the Sections portion and print all of the file's text

4. Select the **Print** and **Destination** options. Note that you can now choose *Packet* from the **Destination** menu to compile a legislative packet.
5. Click **Run**.
6. Click **Close**.

>>Next Section: Searching for Legislative Files

Searching for Legislative Files

You must be in Search mode before you can search for a legislative file. Click **Clear** at any time to return to Search mode.

Text Search

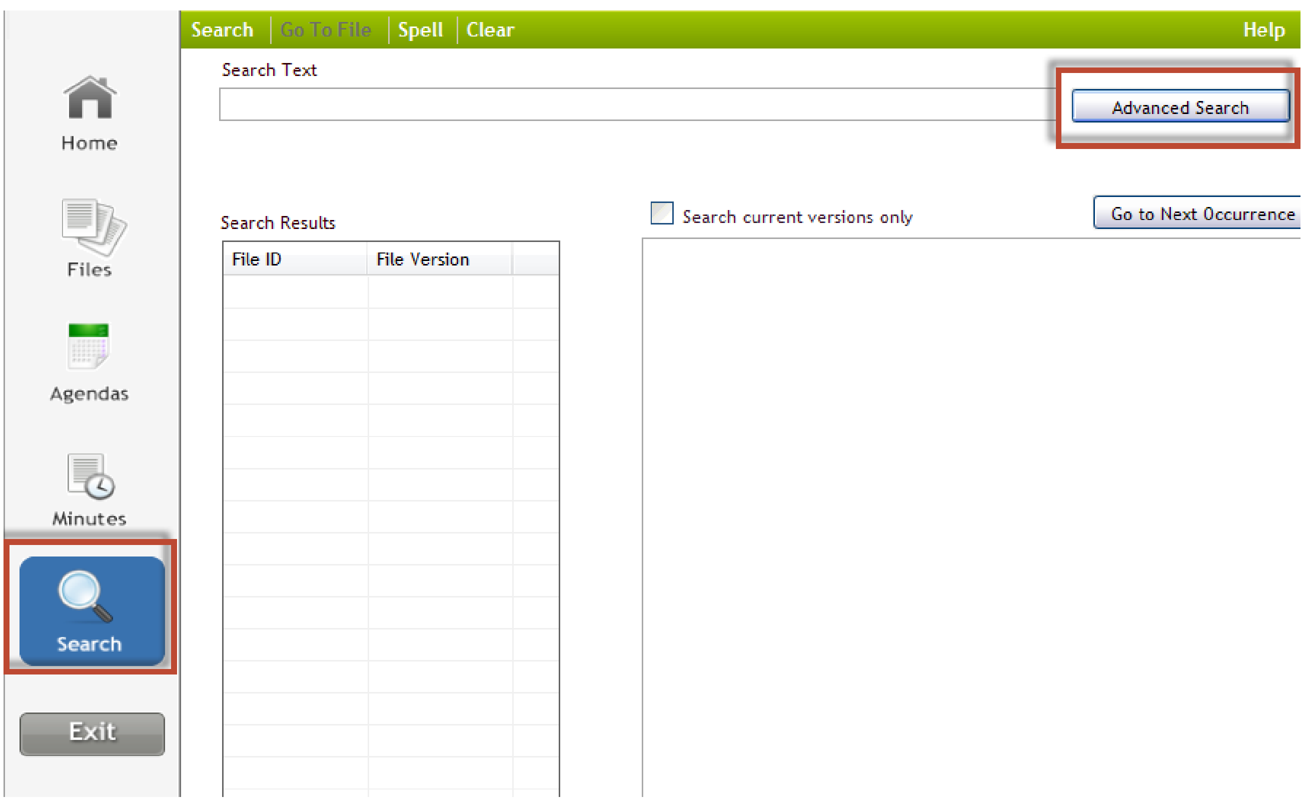
The Text Search searches through the text entered into a file's text section. Clicking on the Advanced Search button gives you much greater flexibility than a normal keyword search. This is achieved by using And, Or, and Not statements.

The simple search looks for a word or consecutive words and displays all the legislative matters that have text files matching the search criteria. Users may further define the search by indicating whether to search the current text file or previous versions.

To display a specific file, use the **Go to File** button at the top of the screen, or, double click the Legislative File number displayed.

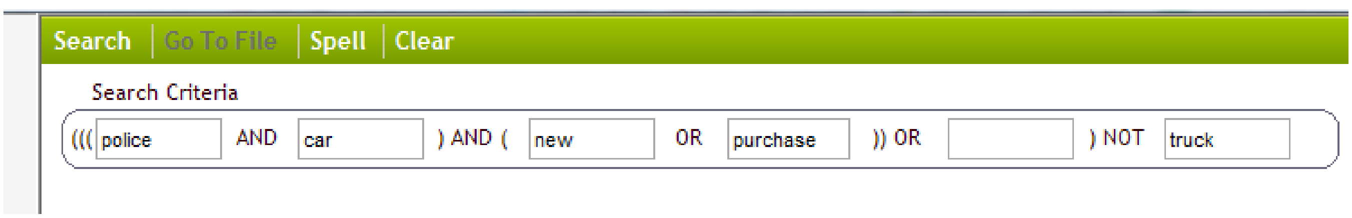
Searching with Advanced Full Text Search

1. Click **Search** on the left side of the Legistar interface, then click **Advanced Search** (see figure below).



2. Enter your search terms using the six boxes at the top of the screen, which are defined below:
   - **AND Search:** If you want your search results to contain two search words, not just one or the other, use the first two boxes.
   - **OR search:** If your desired search results should match either of two search words, use boxes three and four.
   - For search results that match a search word regardless of what you've entered in boxes one through four, enter it into box five.
   - **NOT search:** Any word entered into the last box will eliminate all files containing that word.
3. Click **Search** in the left corner. If you wish to open a file in Legislative Files, double click on that file.

For example, the search shown below would return results containing both "police" and "car" with either the word "new" or "purchase", as long as the file does not contain the word "truck".



Sample Advanced Search

Searching with Simple Search

1. Enter the keyword in the **Search Text** field.
2. Click **Search** to run the search.
3. Enter search terms into any of the Workspace fields in the Files module; these could include the **File ID**, **Type**, **Status**, **In Control**, **File Created**, **Title**, **Agenda Date**, and **Final Action**.

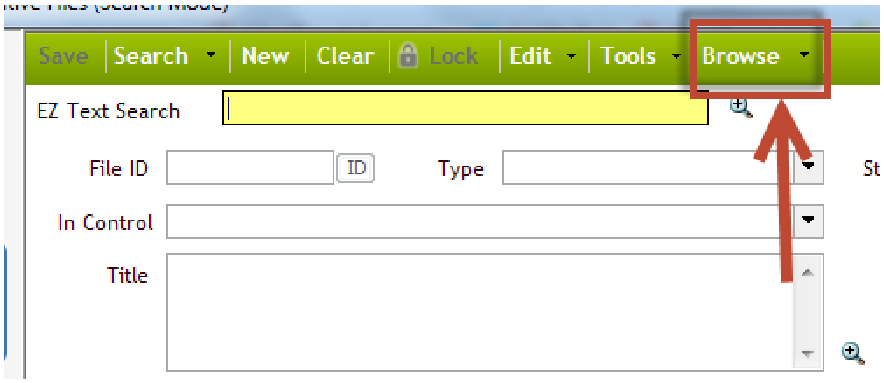
   You can also enter text in the EZ Text Search field. EZ Text only searches through all legislative file text fields; dropdown and date fields are not searched. For example, when searching for the word "park" this will pull forward anything with the word "park" in it. It will pull forward results such as "parking", "parking lot", "Braves Ballpark", etc. In reverse, when searching for "parking lot" anything with the words "Braves Ballpark", "park", and "parking" will be populated. In this particular case, when using multiple words to search, it is a Best Practice to use the Advanced Search.

TIP: Enter an asterisk* after your entered search text to locate all files that contain the entered characters. For example, enter 11-02* to search for files 11-021, 11-022, 11-023, and so on.

Browsing for Legislative Files

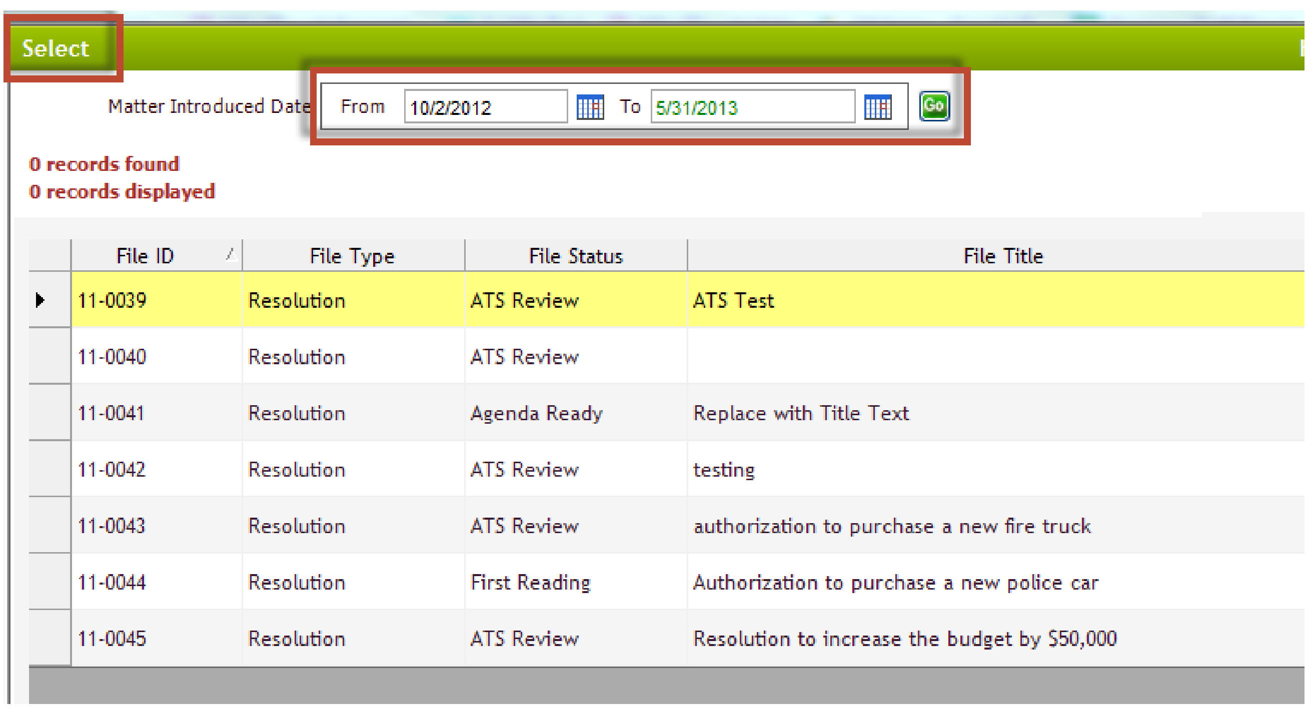
The Browse button serves as a valuable tool for reviewing your entire database's legislative files.

1. Click **Browse**.



Browse Button

2. Enter the dates in which the legislative file may have been introduced. You can also click the calendar button to select dates.
3. Click **Go**.
4. Select the desired legislative file from the list.
5. Click **Select** to open the legislative file.



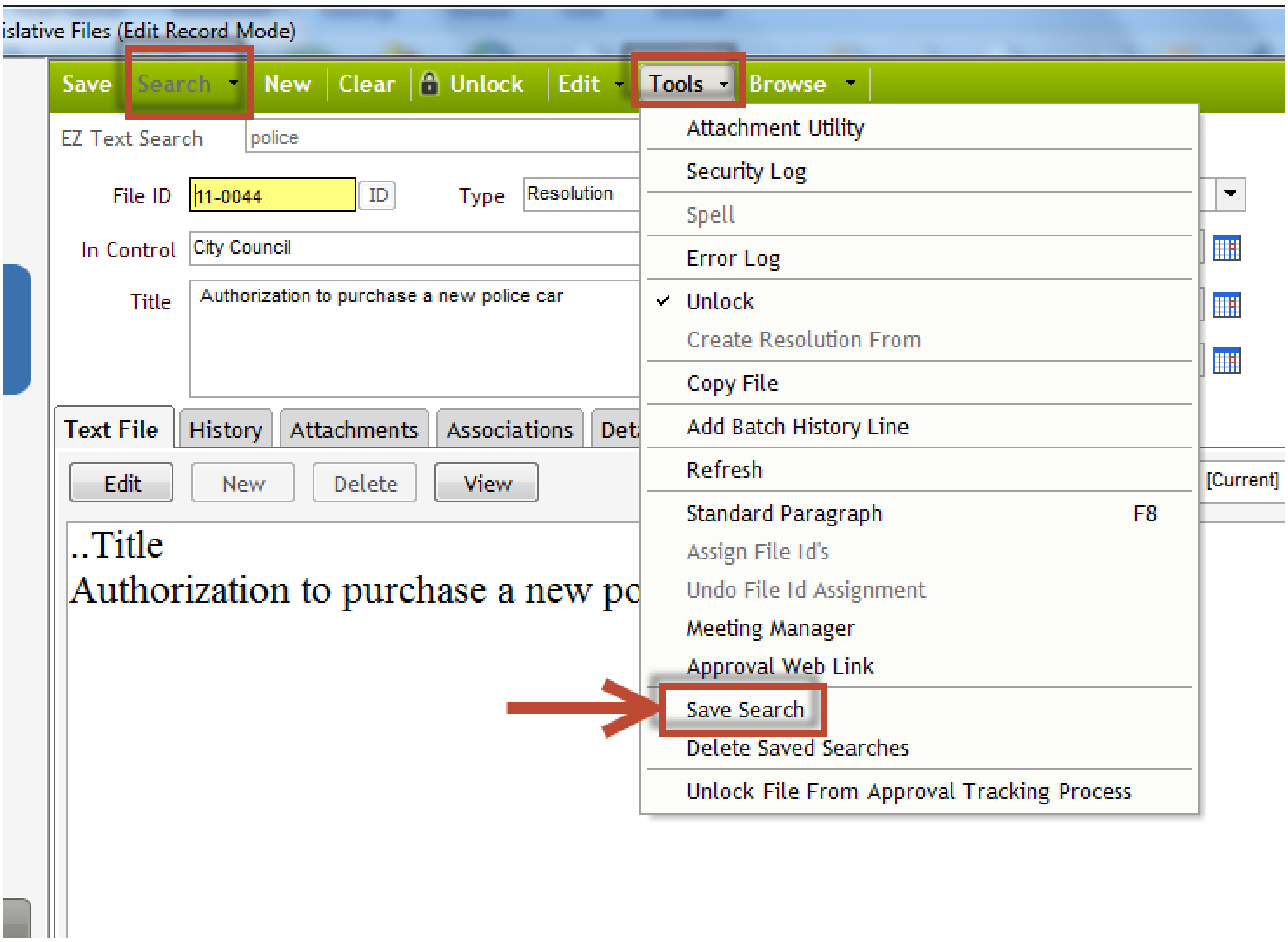
Selecting a Legislative File

>>Next Section: Creating a Saved Search

Creating a Saved Search

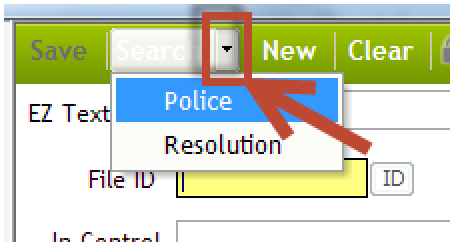
If you regularly run the same search, you may find it helpful to use Legistar's Save Search feature.

1. Verify you are in Search Mode. If the top of the interface does not read "Search Mode," click the **Clear** button.
2. Enter search terms into any of the Workspace fields; these could include the **File ID**, **Type**, **Status**, **In Control**, **File Created**, **Title**, **Agenda Date**, and **Final Action**. You can also enter text in the **EZ Text Search** field.
3. Click **Search**.



Saving a Search

4. Select **Tools** > **Save Search** (see figure above). The Search Name dialog box opens.
5. Enter a name in the text field and click **OK**.
6. Click **Clear** to enable Search mode.
7. Select the **drop-down arrow** next to **Search**.
8. Select the name of the saved search you just created (see figure below).



Search Drop-down Arrow

>>Next Section: Agenda Creation in the Agendas Module

Agenda Creation in the Agendas Module

Agendas in Legistar are made up of header lines and agenda items based on the agenda template. Each agenda section will select and list files based on their Status, Type, and Controlling Body. You can review agendas in the Agendas module.

Your agendas can be automatically generated. You can also add files manually by selecting a line where you want the file to be added and using the Add Line button at the bottom of the screen.

The grids on both the Calendar tab and the Agenda tab can be configured for a specific view. The user can choose to hide or display any of the columns. The display of the columns can be saved by right-clicking on the grid and selecting the context menu option Save Grid Layout.

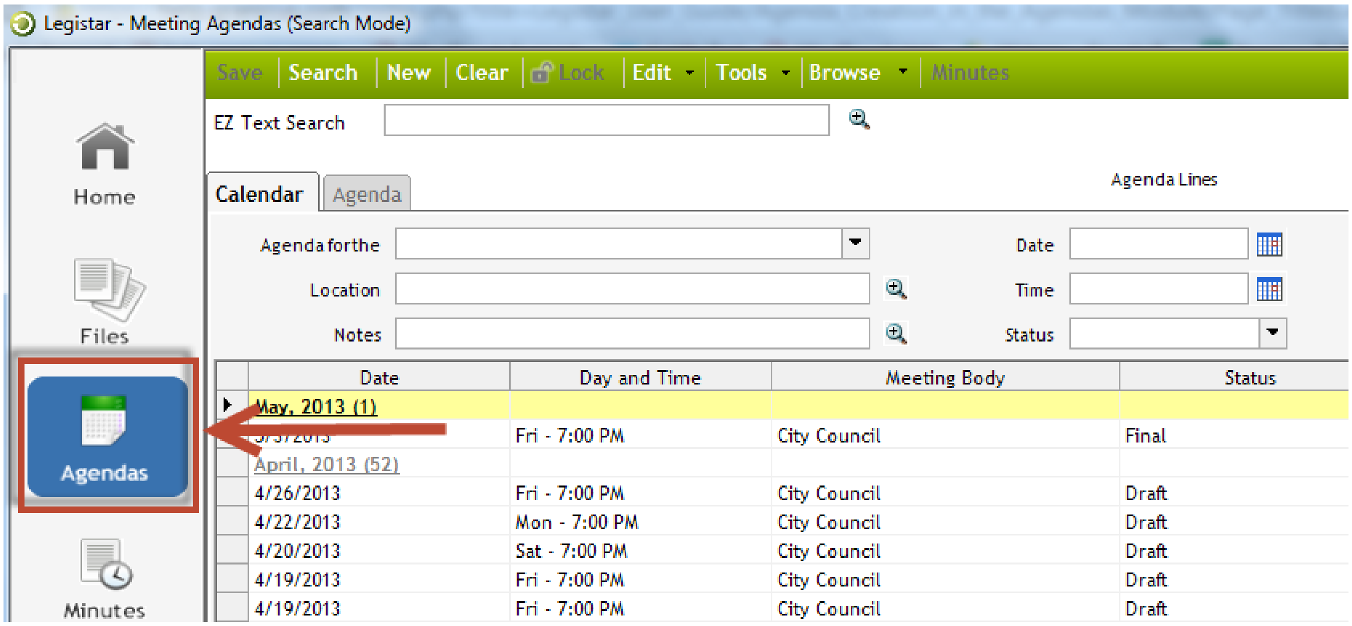
You can also run reports on and delete agendas.

If a section is consistently missing items, there is probably something missing from the Agenda template, and you should contact your system administrator.

>>Next Section: Navigating the Agendas Module

Navigating the Agendas Module

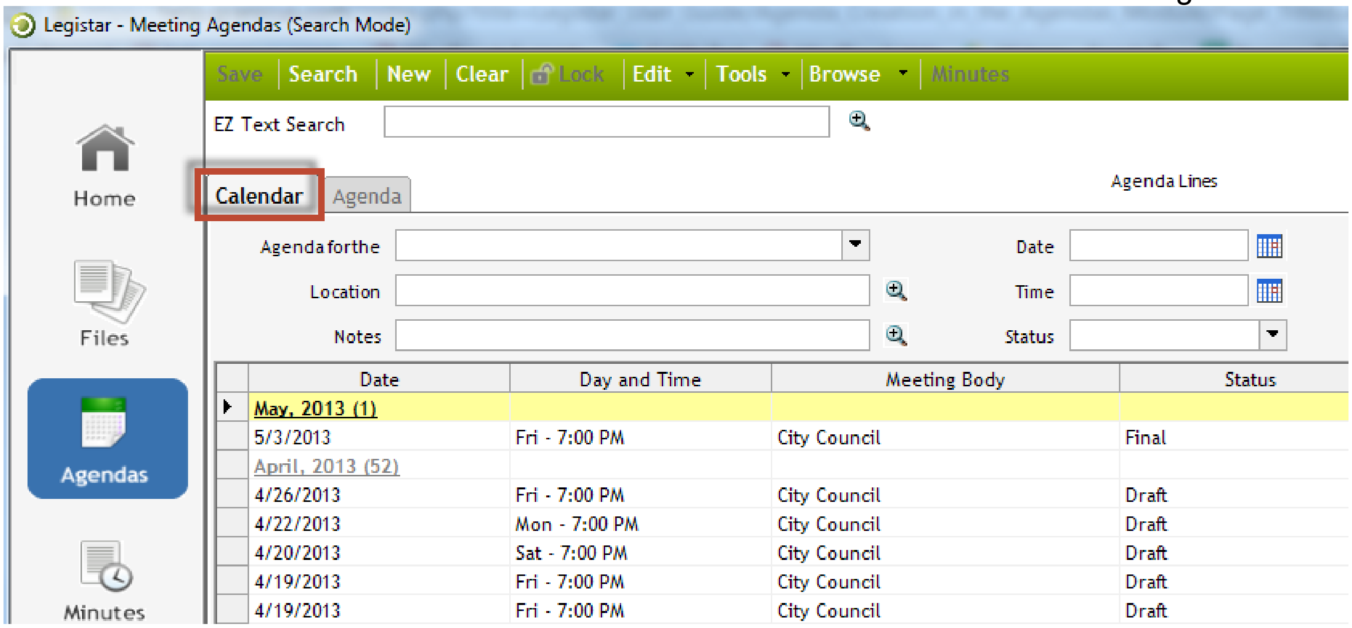
To open the Agendas module, click the **Agendas** button on the left side of the Legistar interface.



Agendas Button

Calendar Tab in the Agendas Module

Use the Calendar tab to view agendas based on user-defined search criteria. The Calendar displays all meetings that occur within the last ninety days. In this tab you can clear the listed meetings and search for meetings outside of the default date range. The 90 day range can be changed by your System Administrator.



The Calendar Tab in the Agendas Module

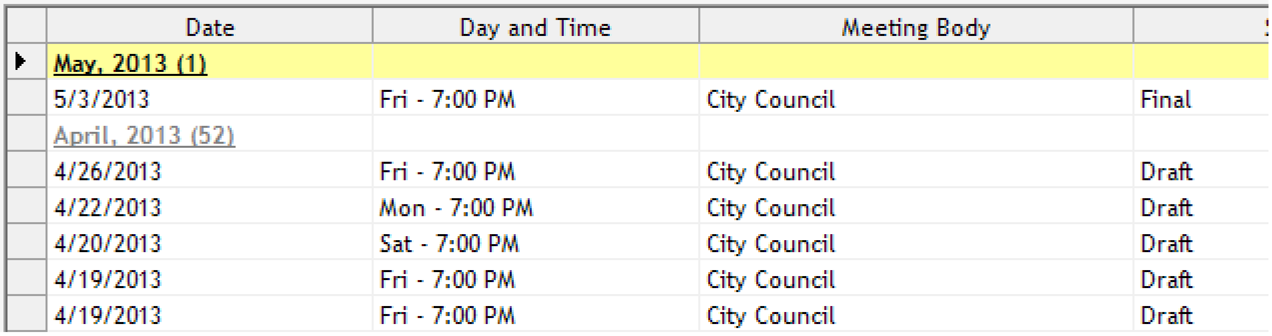
Fields on the Calendar tab

The fields within the Calendar tab allow you to narrow your search for a particular agenda. These fields are described below:

Item	Description
Agenda for the	Allows you to search for the agenda by meeting body
Location	Allows you to search for the agenda by the location of where the meeting occurred
Notes	Allows you to search for the agenda by any notes entered in the field
Date	Allows you to search for the agenda based on the previously set agenda date
Time	Displays when the meeting is scheduled to begin. Every meeting body should have a default time entered by the System Administrator.
Status	Sets the status of the agenda and allows you to publish agendas to InSite. All agendas start in *Draft* and must be changed to *Final* when they are complete

Calendar List

The Calendar List displays the results of your agenda search query, in addition to a list of all available agendas.



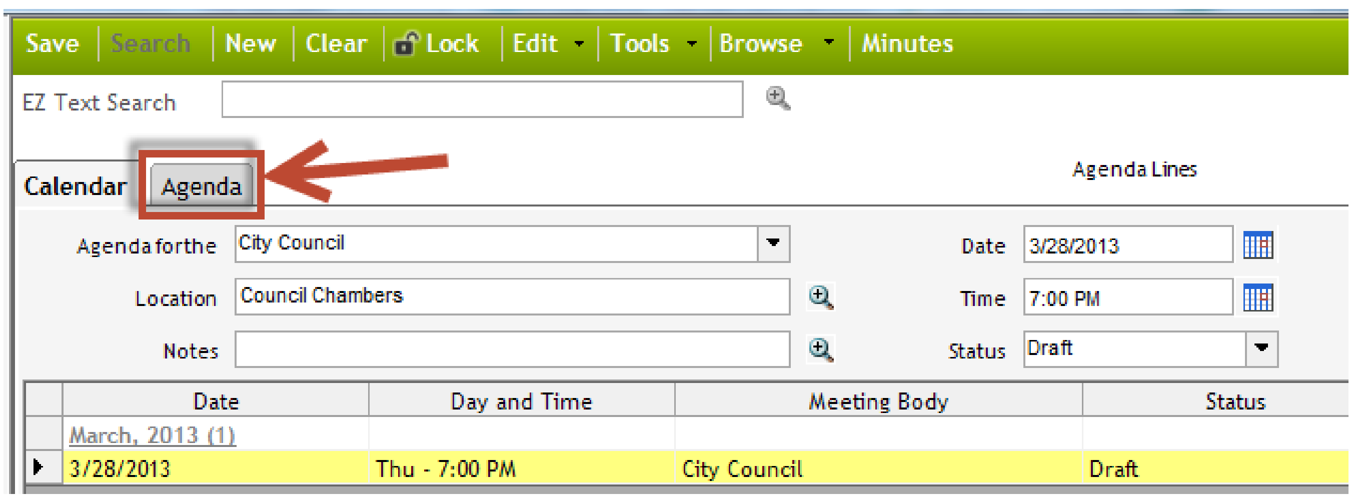
	Date	Day and Time	Meeting Body	
▶	May, 2013 (1)			
	5/3/2013	Fri - 7:00 PM	City Council	Final
	April, 2013 (52)			
	4/26/2013	Fri - 7:00 PM	City Council	Draft
	4/22/2013	Mon - 7:00 PM	City Council	Draft
	4/20/2013	Sat - 7:00 PM	City Council	Draft
	4/19/2013	Fri - 7:00 PM	City Council	Draft
	4/19/2013	Fri - 7:00 PM	City Council	Draft

Calendar List on the Agendas Tab

Agenda Tab in the Agendas Module

The Agenda tab displays the headers and items contained within the agenda. Within this tab you can generate the agenda and edit the lines and the number of items.

1. Select an agenda from the Calendar List.
2. Click the **Agenda** tab from the Agendas module.

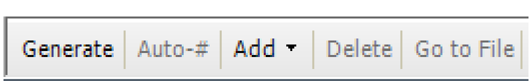


The Agenda Tab in the Agendas Module

Tip for Success! You can select a line on the agenda form by clicking the line, or you can select multiple lines by holding down the Ctrl key and clicking individual lines.

Agendas Tab Buttons

The buttons at the bottom of the Agenda tab interface are exclusive to the tab; they allow you to create a new agenda, auto number agenda items, add new lines, and perform other actions.



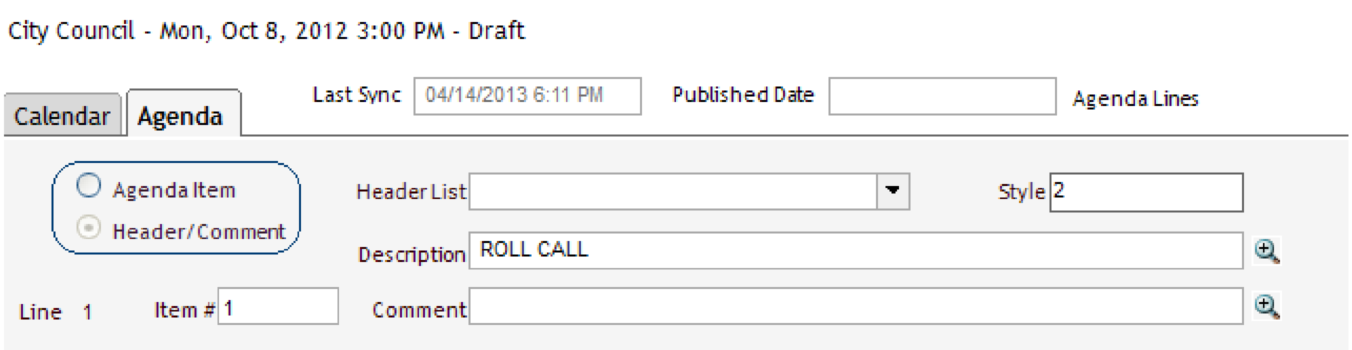
Agenda Tab Buttons

Item	Description
Generate	Allows you to create a new agenda based on the associated template in Administration
Auto #	Allows you to number the agenda items
Add	Allows you to add a blank line above or below a selected line for on-the-fly new agenda item additions. Additionall you can add an existing file or many files already in the system to an agenda, or make a copy of a selected line
Delete	Allows you to remove any selected line(s) from the agenda
Go to File	If an agenda item is selected, this button will open the legislative file's original text

Agenda Item Fields

The Agenda item radio button, when selected, allows you to create a new agenda item or add an agenda item from a list. You can also select the settings for an agenda item.

1. Select the **Agenda Item** radio button to enable the agenda item fields.
2. Complete the agenda Item fields. These fields are described below:



Agenda Item Fields

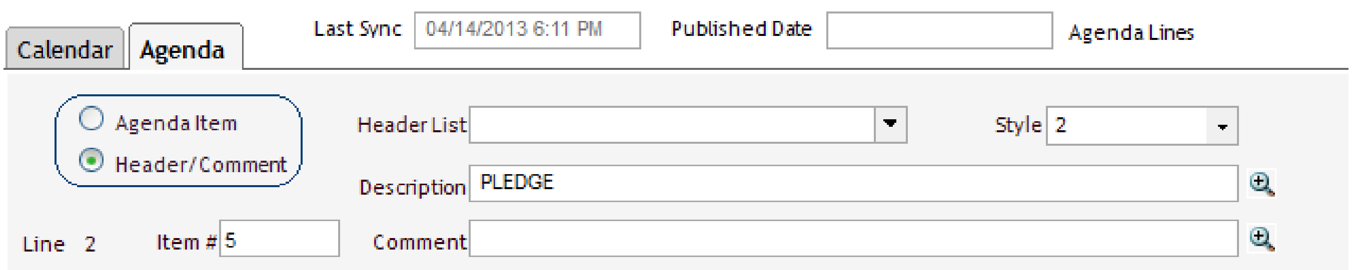
Item	Description
File ID	ID of the Legislative File associated with the Agenda item; click within the field to enter the ID or click the **dropdown button** to select a legislative file

File Type	The file type of the selected legislative file displays any file the meeting body can act on without a final action date; however, if entering a new file, select a File Type from the dropdown menu
Description	The file's name; does not print on the report. If entering a new file, this displays the File Title.
Comment	Click within this optional field to record notes or instructions regarding the agenda item
Item #	The number for each agenda item within the agenda form, click the Auto # button to generate

Header / Comment Fields

The Header / Comment button, when selected, allows you to create new headers or edit existing headers.

1. Select the **Header / Comment** radio icon to enable those fields.
2. Complete the Header / Comment fields. These fields are described below:



Header/Comment Fields

Item	Description
Header List	Allows you to select a header from a list of headers used in the agenda template
Style	Controls the font size and formatting the header uses when it appears on the agenda report
Description	Contains the text of the header or the title\name of the legislative file
Item #	Assigned numbers for headers on the agenda form. They do not print on the agenda and minutes and should not be changed
Comment	Displays any notes or instructions for the associated header

Agenda Tools Menu

The Tools dropdown menu is unique to each module. The following features can be found in the Agendas module's Tools menu.

Item	Description
Security Log	Allows you to view a list of all changes, the date, and time for the legislative file
Spell	Allows you to spell check all text fields for the legislative file
Change Meeting Date	Only available in the Calendar tab; allows you to change a meeting date after the agenda is generated
Fix Line Numbers	Allows you to fix line numbers if they are ever out of order and contain duplicates
Delete Multiple Lines	Allows you to delete all selected lines
Error Log	For support purposes only; to be used only with the guidance of the Granicus staff
Work Style	Displays header lines in a text style similar to the header text for each line
Lock	Allows you to lock a file and prevent any changes until it is unlocked. If the file is already locked, this option will display as "Unlock"
Lock All Legislative Files	Allows you to lock all items listed on the agenda
Unlock All Legislative Files	Allows you to unlock all items listed on the agenda
Create Resolution From	Create a legislative file from an added agenda item
Copy File	Allows you to duplicate a selected legislative file
Refresh	Updates the screen with any changes you or another user may have recently made
Standard Paragraph	Allows you to store commonly used sentences and paragraphs in one location. You can copy this stored copy into any text field in Legistar
Assign File Id's	Allows you to automatically assign File ID's to agenda items

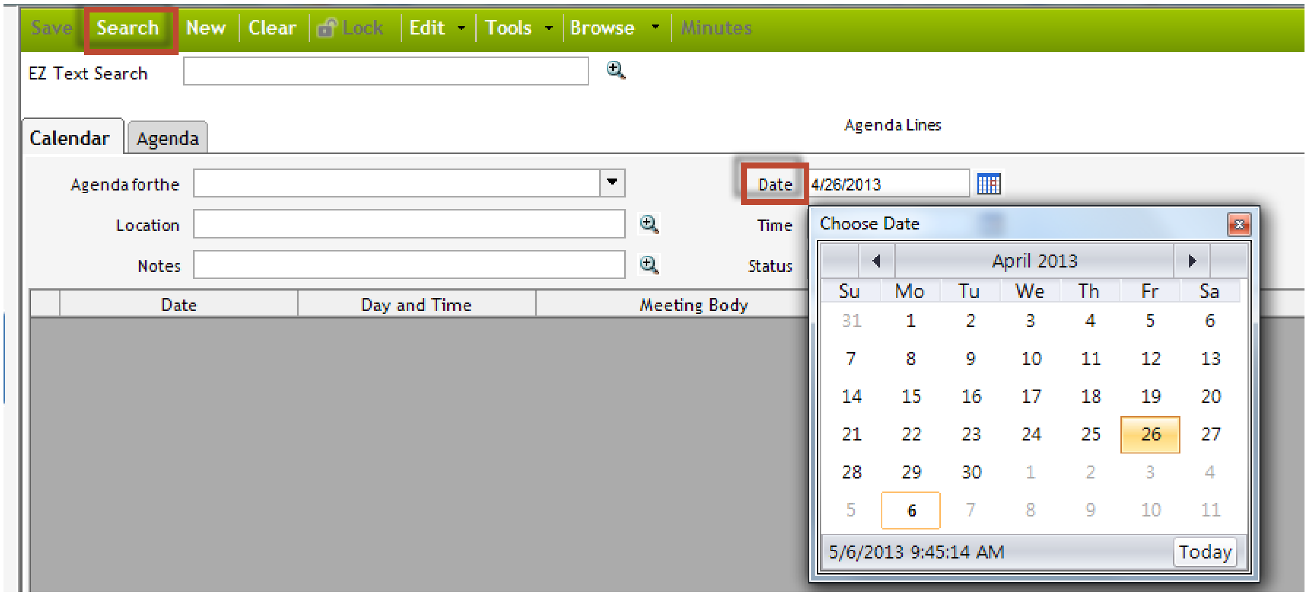
Undo File Id Assignment	Allows you to undo the assignment of File ID's to agenda items
Export Data	This will open the export data form for setting the values when exporting to MediaManager. This is only enabled if manual export is being used
Edit Export Options	Allows you to edit the export settings
LiveManager	Launches the Live Manager application for recording your meeting minutes and actions
Approval Web Link	Used in conjunction with the Approval Tracking module
Delete Published Agendas from Calendar	Allows you to remove the report if an agenda has been published to InSite
Attach File to Selected Records	This will add an attachment to all files on the agenda in one step

>>Next Section: Reviewing Legislative Files

Reviewing Legislative Files (Clerks)

1. Enter or select an agenda date from the **Date** field.

2. Click **Search** (see figure).



Selecting the Agenda Date

3. Review the **Status** of the legislative files. Although the system will automatically notify approvers of their due dates, at this point you may also wish to send out a friendly reminder to the approvers to get their items approved before the agenda deadline.

4. Update the **Status** of the legislative files.

It is important to understand what criteria places a file in a particular place so you can troubleshoot to determine why a legislative file is not on an agenda or isn't in the right section. During Legistar training you will be provided these exact details, or you can ask the system administrator to print you an agenda definitions report.

>>Next Section: Generating an Agenda

Generating an Agenda

Agenda Process

You can create agendas with the click of one button. The Generate button in Legistar retrieves all the legislative files matching preset Agenda Definitions. These definitions set agenda order, headings, and the placement location of legislative files.

It is important you understand the criteria for the placement of a legislative file on the agenda; this allows you to troubleshoot any agenda generation problems you may have.

The following additional variables determine where a file appears on an agenda:

- File Type
- Status
- Controlling Body
- Agenda Date

The following Administration setting controls how the agenda is generated:

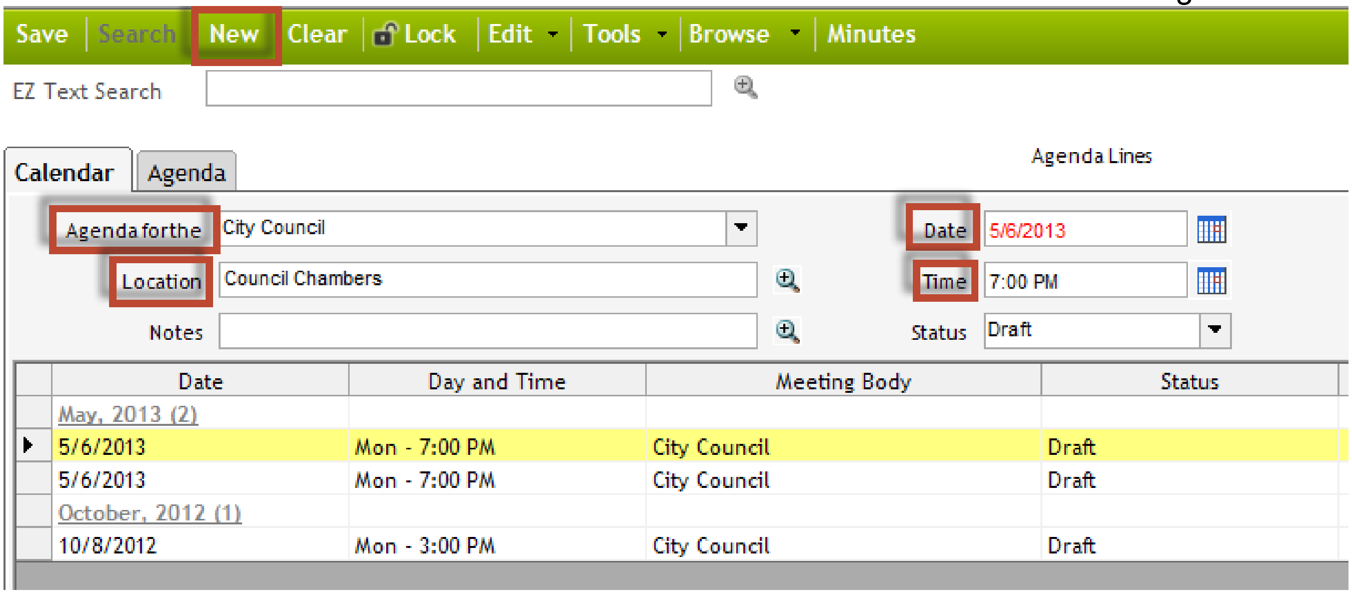
- File placement under **Administration > Legislative Files > File Statuses**

At the completion of the generation of your agenda, a corresponding minutes document is also created. This minutes document is an exact replica of the agenda and it is used to record the meeting's motions and votes.

How to Generate an Agenda

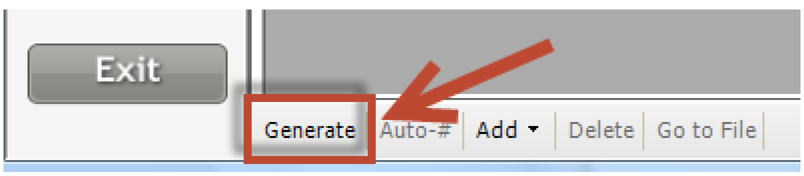
To create a new agenda, you will combine the legislative files you previously created and organize them into the meeting agenda document. You have the options to either automatically generate the agenda or manually add lines to the agenda form. The recommended method is to generate an agenda, which automatically will place the legislative files in the correct position on the agenda. The manual method should be used for a special meeting or meeting cancellation notice.

1. Click **New** from the Calendar tab.
2. Select the meeting body from the **Agenda for the** drop-down menu.
3. Verify the **Date**, **Location**, and **Time** default settings. Note that the Location field typically refers to a room, not a street address. The Location and Time default settings are set in **Administration** > **Government Bodies** > **Bodies**.



Generating a New Agenda - Calendar Tab

4. Click the **Agenda** tab.
5. Click **Generate**. The Agenda Status keeps the agenda from being published on InSite. When you click the Generate button to create the agenda, the Agenda Status is set to *Draft*. When the Agenda Status is changed to *Final*, the individual is able to view the agenda from InSite.



The Generate Button on the Agenda Tab

6. Confirm the agenda generates in the Agenda window. When the agenda is generated, Legistar combs through the database and assigns legislative files to the agenda based on the Agenda Definitions and Agenda Dates you have set for the selected meeting body. At this time you should review each legislative file and verify each is in its correct location.

After you are satisfied with your agenda, you must finalize it.

>>Next Section: Adding, Copying, and Deleting Agenda Lines

Adding, Copying, and Deleting Agenda Lines

You can edit your agenda by adding, copying, or deleting agenda lines.

Agenda Lines

There are two types of agenda lines; header lines and legislative files. The type of line is indicated by the Agenda Item and Header / Comment radio buttons next to the File ID field.

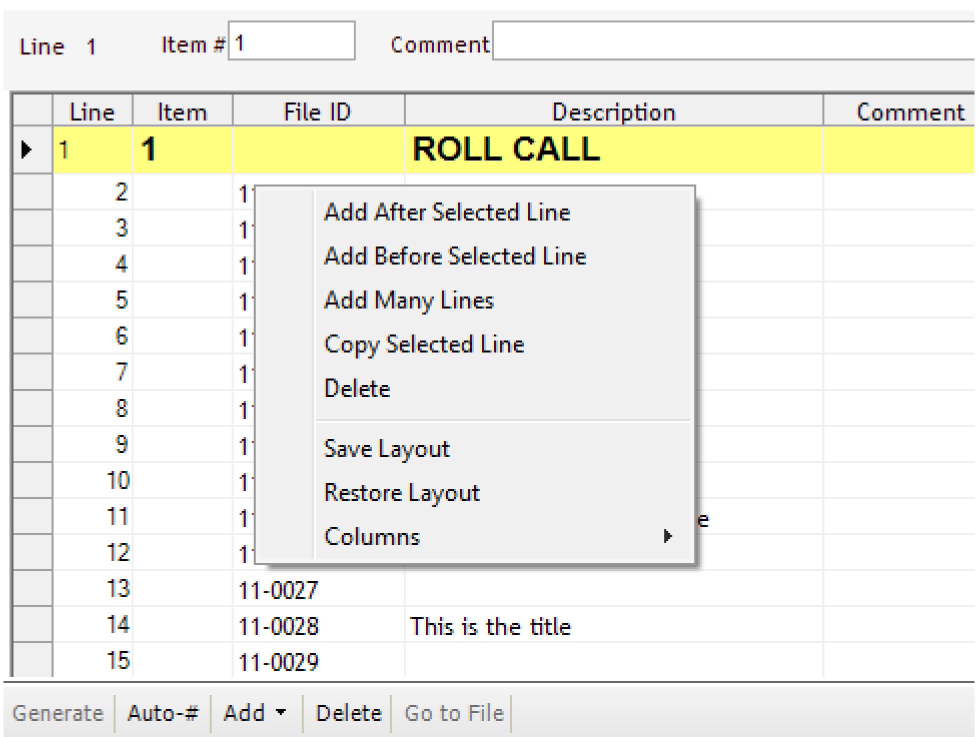
- Header Lines- Procedural Items such as invocation and roll call or section titles such as “Communications from Municipal Agencies” or “Bills Introduced.”
- Legislative Files- Database files that are easily recognizable on the agenda form as they display File ID numbers.

Adding Agenda Lines

There are multiple ways to add new lines to the agenda document.

1. Right-click any line from the agenda document, or click **Add** at the bottom of the screen.
2. Select one of the following:

- Select **Add after Selected Line** to place the new line after the existing line.
- Select **Add before Selected Line** to place the new line before the existing line.
- Best Practice: Select **Add Many Lines** to enter more than one line after the existing line.
  - Hold down Ctrl and select Legislative Files from the multiple file menus.
  - Click the larger arrow to move the files into the Agenda.



Copying Agenda Lines

1. Select the **legislative file** you want to copy.
2. Click the **dropdown Add arrow >** select the **Copy Selected Line option**.
3. Confirm the line is added to the agenda form.
4. Click **Save**.

Deleting Agenda Lines

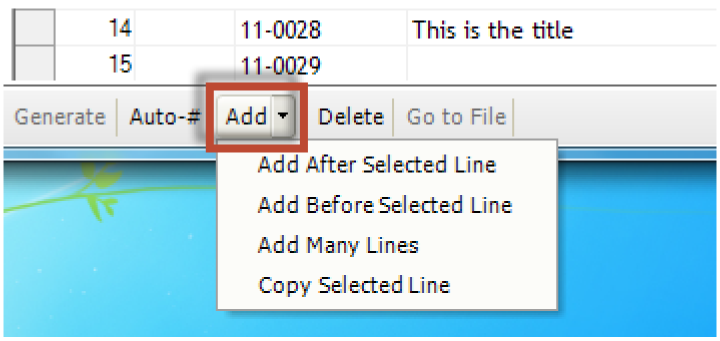
1. Select an agenda line from the Agenda window.
2. Click **Delete**, or right-click the line you want to delete and select **Delete** from the context menu available.
3. Click **Yes** at the confirmation dialog.

>>Next Section: Creating an Agenda Manually

Creating an Agenda Manually

You can create agendas manually for special meetings or cancellation notices. Typically, these agendas will only contain a few agenda lines.

1. Verify you are on the Calendar tab of the Agenda module.
2. Click **New**.
3. Select the meeting body from the **Agenda for the** drop-down menu.
4. Select the date from the **Date** menu.
5. Confirm the default settings are accurate.
6. Click the **Agenda** tab.
7. Click the **Add** button and select one of the options from the drop-down menu available (see figure below).



Add Menu Options

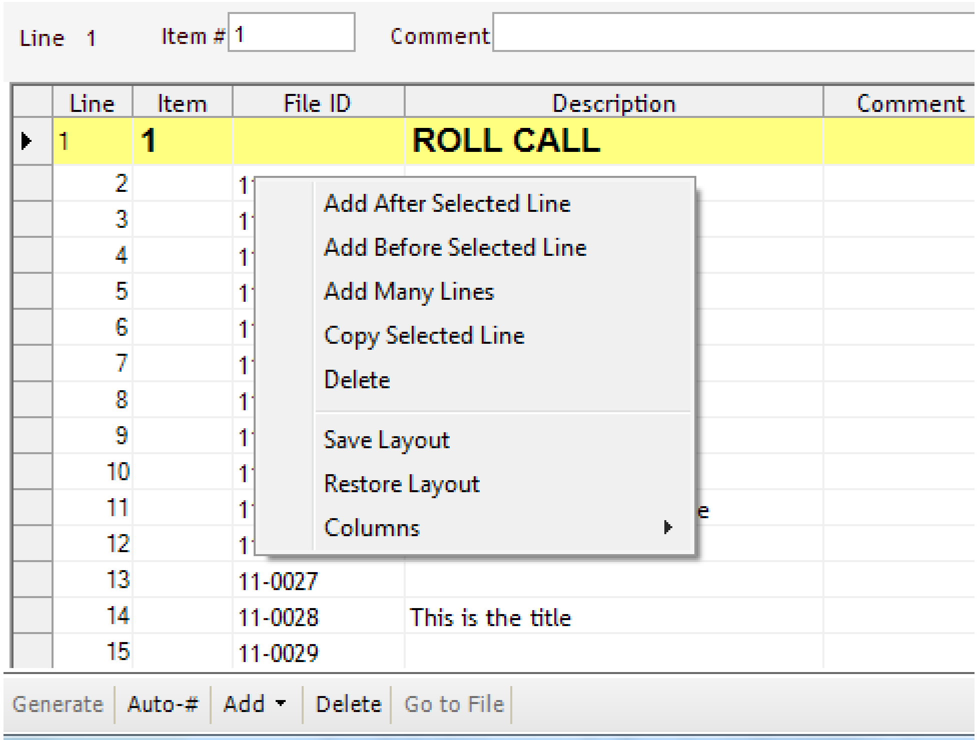
Agenda Lines

There are two types of agenda lines; header lines and legislative files. The type of line is indicated by the Agenda Item and Header / Comment radio buttons next to the File ID field.

- Header Lines- Procedural Items such as invocation and roll call or section titles such as "Communications from Municipal Agencies" or "Bills Introduced."
- Legislative Files- Database files that are easily recognizable on the agenda form as they display File ID numbers.

There are multiple ways to add new lines to the agenda document.

1. Right-click any line from the agenda document, or click **Add** at the bottom of the screen.
2. Select one of the following:
   - Select **Add after Selected Line** to place the new line after the existing line.
   - Select Add before Selected Line to place the new line before the existing line.
   - Best Practice: Select Add Many Lines to enter more than one line after the existing line.
     - Hold down Ctrl and select Legislative Files from the multiple file menus.
     - Click the larger arrow to move the files into the Agenda.



Adding Agenda Lines

Copying Agenda Lines

1. Select the **legislative file** you want to copy.
2. Click the **dropdown Add arrow >** select the **Copy Selected Line option**.
3. Confirm the line is added to the agenda form.
4. Click **Save**.

Deleting Agenda Lines

1. Select an agenda line from the Agenda window.
2. Click **Delete**, or right-click the line you want to delete and select **Delete** from the context menu available.
3. Click **Yes** at the confirmation dialog.

>>Next Section: Finalizing an Agenda

Finalizing an Agenda

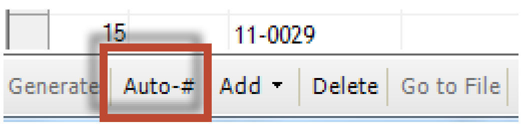
After you have organized the agenda lines on the agenda form, complete the following steps to finalize the agenda.

Agenda Auto-Numbering

Only complete the steps in this section if you use agenda item numbers.

The default numbering structure assigns all of the legislative files under one heading a number in numerical order. The numbering starts over under any subsequent heading. However, the numbering could be structured differently if you change the agenda numbering settings in **Administration** > **System Settings**.

1. Click the **Auto-# button**.



Auto # Button

2. Click **Yes** at the confirmation dialog.
3. Confirm numbers have been added to the legislative files.

Agenda Status

The agenda status keeps the agenda from being published on InSite. When you click the **Generate** button to create the agenda, the agenda status is set to *Draft*. When the agenda status is changed to *Final*, the individuals to which you gave the proper security settings will be able to view the agenda

Creating a Board Agenda

1. Click **New** at the top of the Agenda module from the Calendar tab.
2. Verify the **Date**, **Time**, and **Location** are correct.
3. Enter whether the meeting is regular, special, or rescheduled in the **Notes** field.
4. Click **Save.**
5. Click the **Agenda tab** > **Generate.** Selecting Generate applies agenda header lines and items to the agenda based on the template set in Administration.
6. Select an agenda item to place a new agenda line and click **Add**.
7. Click the **Auto #** button to number the agenda lines > click **Yes** at the dialog.
8. Click **Reports** and select the **Board Agenda** option. This may be renamed to something else, such as **Meeting Agenda**, depending on how your organization chose to configure Legistar. See Setting Up Meeting Agenda Reports for more details.
9. Configure the report settings. These settings are described below:

Item	Description
Show Cover	Prints the cover page for the agenda report
Show File ID	Displays each File ID for agenda items print on the report
Show Agenda Status	Prints the word “Draft” on the agenda when in *Draft* status; this should be unchecked when publishing the agenda
Show Legislative File Sponsors	Prints the sponsors for each agenda item on the report
List Attachments	Prints a list of all supporting documentation for each agenda item
Show Agenda Notes	Prints the notes taken on each line of the agenda
Show Legislative File History	Prints the history associated with each agenda item
Show Legislative File History Notes	Prints the notes that were taken in reference to each action taken on the agenda items
Show Text Title	Prints the title contained in the Title box rather than the ..Title of the file text
Select Disability Boiler Plate	Allows users to select from various Disability Boiler Plates contained in Administration

10. Select the **Report Destination**.
11. Click **Run**.
12. Select *Final* from the **Status** drop-down menu on the Calendar tab.

Creating a Committee Agenda

The steps for making a committee agenda are similar to those for creating a board agenda, but no items are automatically pulled in using the generate button. Only the agenda outline is created.

1. Click the **New button** at the top of the Agenda module from the Calendar tab.
2. Verify the **Date**, **Time**, and **Location** are correct.

3. Click **Generate** from the Agenda tab.
4. Select and right-click the appropriate header under which you want to list agenda items, then click **Add**. Insert an agenda item that will be heard on that meeting.
5. Click **Auto #** at the bottom of the Agenda tab.
6. Click **Reports** and select **Committee Agenda** from the menu available. This may be named something else, such as **Meeting Agenda Outline Only**, depending on how your organization has configured Legistar. See Setting Up Meeting Agenda Reports for more details.
7. Configure the report settings. These settings are described below:

Item	Description
Show Cover	Prints the cover page for the Agenda Report
Show File ID	Prints the File ID for each agenda item on the report
Show Agenda Status	Prints the word “Draft” on the agenda when in draft status**.** This should be unchecked when publishing the agenda
Show Legislative File Sponsors	Prints the sponsors for each agenda item on the report
List Attachments	Prints a list of all supporting documentation for each agenda item
Show Agenda Notes	Prints the notes taken on each line of the agenda
Show Legislative File History	Prints the history associated with each agenda item
Show Legislative File History Notes	Prints the notes taken in reference to each action taken on the agenda items
Show Text Title	This will print the title contained in the Title box rather than the ..Title of the File text

8. Select the **Report Destination** and click **Run**.
9. Select *Final* from the **Status** drop-down menu on the Calendar tab.

Publishing an Agenda to InSite

When you create the agenda without adding agenda items a notice about the upcoming meeting will automatically be placed on the InSite page.

1. Select the agenda from the **Agenda List** in the Agendas module.
2. Change the **Status** of the agenda to *Final*.
3. Set the **Destination** to *Publish to Calendar*.
4. Click **Run**.
5. Click **Yes** at the Update Agenda URL popup if you would like to send the Agenda URL to Granicus MediaManager for storage in the template. This will enable the agenda URL on the Granicus view page so the agenda is viewable when the meeting video is in playback.

Meeting Details

- When the status of the meeting is set to *Final*, the Meeting Details link under the Calendar tab will become live.
- The Meeting Details link lists all of the legislative files on the agenda without including the Headers.

Agenda and Minutes Reports

- The agenda and minutes reports are not available on InSite until you publish them using the Publish to Calendar option in the Reports window of Legistar.
- Publishing the agenda or minutes enables the appropriate hyperlink within the InSite calendar.

Item	Description
Show Cover	Displays an extra page with the logo, listing of body members, etc.
Show File ID	Displays the legislative file ID on the report
Show Agenda Status	Displays the meeting status, allowing individuals to distinguish between a draft and final copy of the report
Show Legislative File Sponsor	Displays the legislative file sponsor
Keep Section Together	Keeps the sections together on one page; restricts a legislative file from starting on a new page of the agenda
Show Notes	Displays the Agenda Note on the report
List Attachments	Lists all the attachments that are a part of the legislative file
Show Text Title	Displays the ..title on the report

>>Next Section: Running and Printing Agenda Reports

Running and Printing Agenda Reports

The Agendas report tab includes five report options which can be renamed in Administration. All reports have a criteria tab; this tab allows you to determine the variables that you want to display on the report every time you run it.

Meeting Agenda

The Meeting Agenda report creates the committee agenda. The boxes on the criteria page allow for some flexibility on which data fields are shown.

1. Click **Reports** > select **Meeting Agenda**. If you don't see this option, check with your Legistar administrator to ensure you are selecting the committee agenda report.
2. Configure the following settings as desired:

Item	Description
Show Cover	Prints the cover page for the Agenda Report
Show File ID	Prints each File Id for agenda items on the report
Show Agenda Status	Prints the word “Draft” on the agenda when in draft status. This should be unchecked when publishing the agenda
Show Legislative File Sponsors	Prints the sponsors for each agenda item on the report
List Attachments	Prints a list of all supporting documentation for each agenda item
Show Agenda Notes	Prints the notes taken on each line of the agenda
Show Legislative File History	Prints the history associated for each agenda item
Show Legislative File History Notes	Prints the notes that were taken in reference to each action taken on the agenda items
History Notes	Prints the file history and notes from the history line
Keep Section Together	This keeps items from being separated onto different pages

Item	Description
Show Text Title	This will print the title contained in the Title box rather than the ..Title of the File text

3. Set the **Destination** option.
4. Click **Run**.

Hearing Notice

The Agenda Hearing Notice report is a brief agenda overview designed to be sent to attendees before a meeting.

1. Click the **Reports** button > select **Agenda Hearing Notice**.
2. Configure the following settings as desired:

Item	Description
Name List	This will auto-populate the Selected Names field with a pre-defined list created by the System Administrator
Selected Names	These names will print at the top of the report as addressees of the report

3. Set the **Destination** option.
4. Click the **Run button**.

Printing Agenda Reports

1. Select the agenda document you want to publish from the Calendar tab.
2. Select *Final* from the **Status** drop-down menu.
3. Click the **Reports** drop-down button, and select one of theoptions, depending on which report you'd like to run**.**
4. Set the **Destination** to *Printer***.**
5. Click **Run**.

>>Next Section: Using InSite with your Agenda

Using InSite with your Meeting Agenda

The following contains additional information on how to use InSite with your meeting agenda.

Meeting Details

When the status of the meeting is set to *Final*, the Meeting Details link under the Calendar tab will become live.

The Meeting Details link lists all of the legislative files on the agenda and allows users to upload Cancellation Notices or other reports to a meeting.

Upload a Cancellation Notice

The Cancellation Notice Report allows the clerk to post a cancellation notice on InSite.

1. Sign in to InSite with your Legistar username and password.
2. Select the **Meeting Details** link attributed to the meeting that will be cancelled.
3. Click **Add New File** located next to **Attachments**.
4. Select the **Agenda** option.
5. Click in the **File** field and browse to your saved Cancellation Notice; select the notice.
6. Enter a file name in the **Name** field, i.e. “Cancellation Notice.”
7. Click **Upload**.

>>Next Section: Deleting an Agenda

Deleting an Agenda in Legistar

To delete an agenda from Legistar, complete the following steps in the Agendas module:

1. Verify you are in Edit Record mode.
2. Select the agenda document you want to remove from the Calendar tab.
3. Select **Edit** > **Delete Meeting**.
4. Click **Yes** at the confirmation prompt.

If an agenda has already been published to InSite, select **Tools** > **Delete Published Agendas from Calendar** and click **Yes** at the confirmation prompt.

>>Next Section: Meeting Action Management

Meeting Action Management

We've recently updated Legistar and LiveManager so that they work together better. Many of you may now be using LiveManager in place of Meeting Manager. For help using LiveManager with Legistar, please see Working with Legistar and LiveManager.

We will be phasing out Meeting Manager over the next several months. See the articles below for instructions on using Meeting Manager:

Getting Started in Meeting Manager

Admin Setup for Meeting Manager

Running a Meeting in Meeting Manager

Recording a Meeting in Meeting Manager

Indexing in Meeting Manager

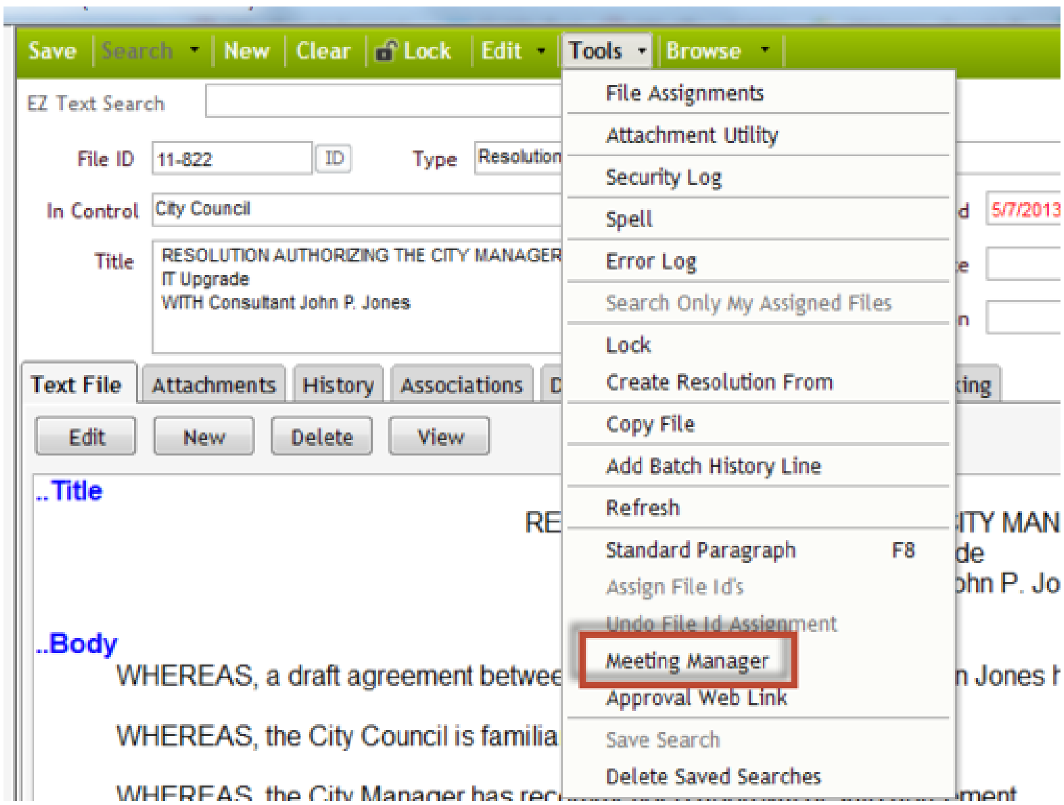
Stopping the Meeting

>>Next Section: Meeting Finalization in the Minutes Module

Getting Started in Meeting Manager

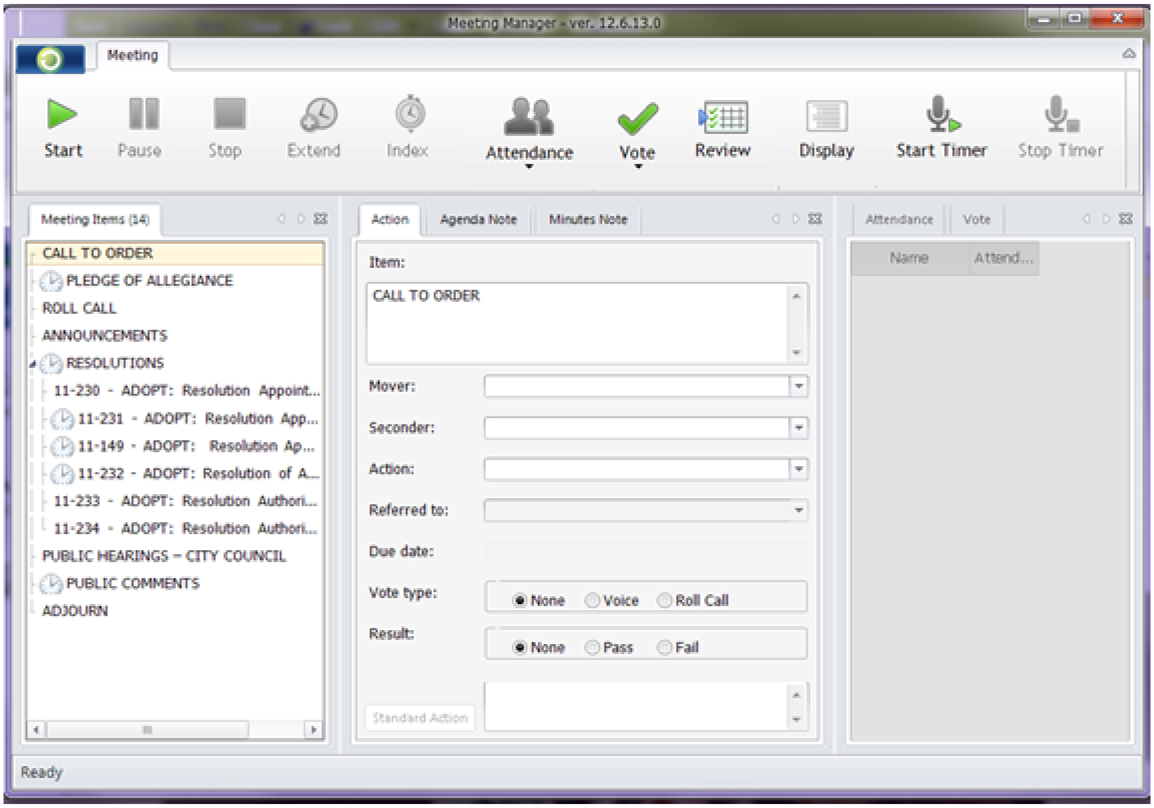
Launching Meeting Manager

1. Open the Agendas module.
2. Double-click an agenda to open.
3. Select **Edit** > **Edit Record**.
4. Select **Tools** > **Meeting Manager**.



Launching Meeting Manager

5. Confirm Meeting Manager opens.

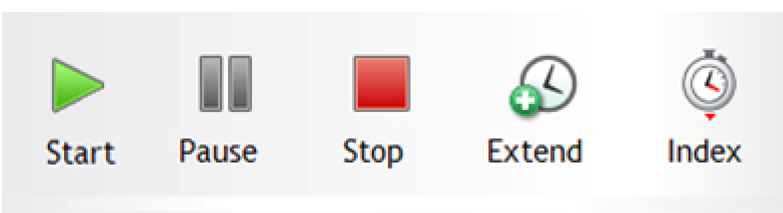


Meeting Manager

Navigating Meeting Manager

Review the following sections for an overview of Meeting Manager’s features.

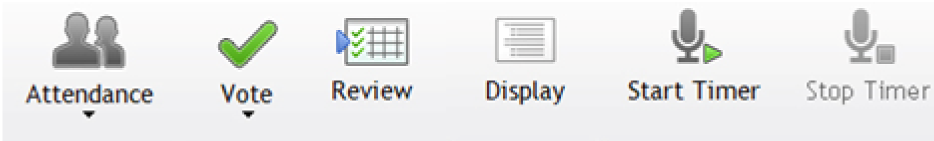
Encoder Control Buttons



Meeting Manager Encoder Control Buttons

- The **Start** button begins the recording and live streaming (if enabled) of your meeting.
- The **Pause** button temporarily stops the recording of your meeting; the live stream of your meeting will continue to broadcast when Pause is clicked.
- The **Stop** button ends the recording and live streaming (if enabled) of your meeting. Only click this button when you are absolutely sure the meeting is over.
- The **Extend** button adds 30 minutes to the duration time of your meeting.
- The **Index** button syncs a particular agenda item with a specific time in the video recording.

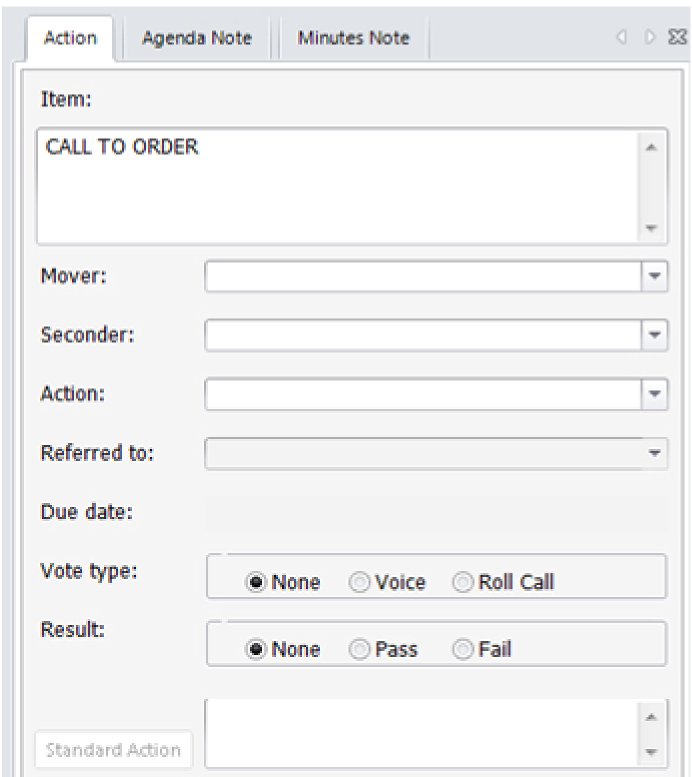
Meeting Action Buttons



Meeting Action buttons

- The **Attendance** button captures the attendance of the meeting members.
- The **Vote** button records the results of a vote.
- The **Review** button allows the user to study the results of the recorded votes.
- The **Display** button enables the public display of the meeting; this allows the public to view the results of votes.
- The **Start Timer** button begins a timer for monitoring the duration of a speaker's time.
- The **Stop Timer** button ends the speaker's timer.

The Action Summary, Agenda Notes, and Minutes Notes Tabs



Action summary tab

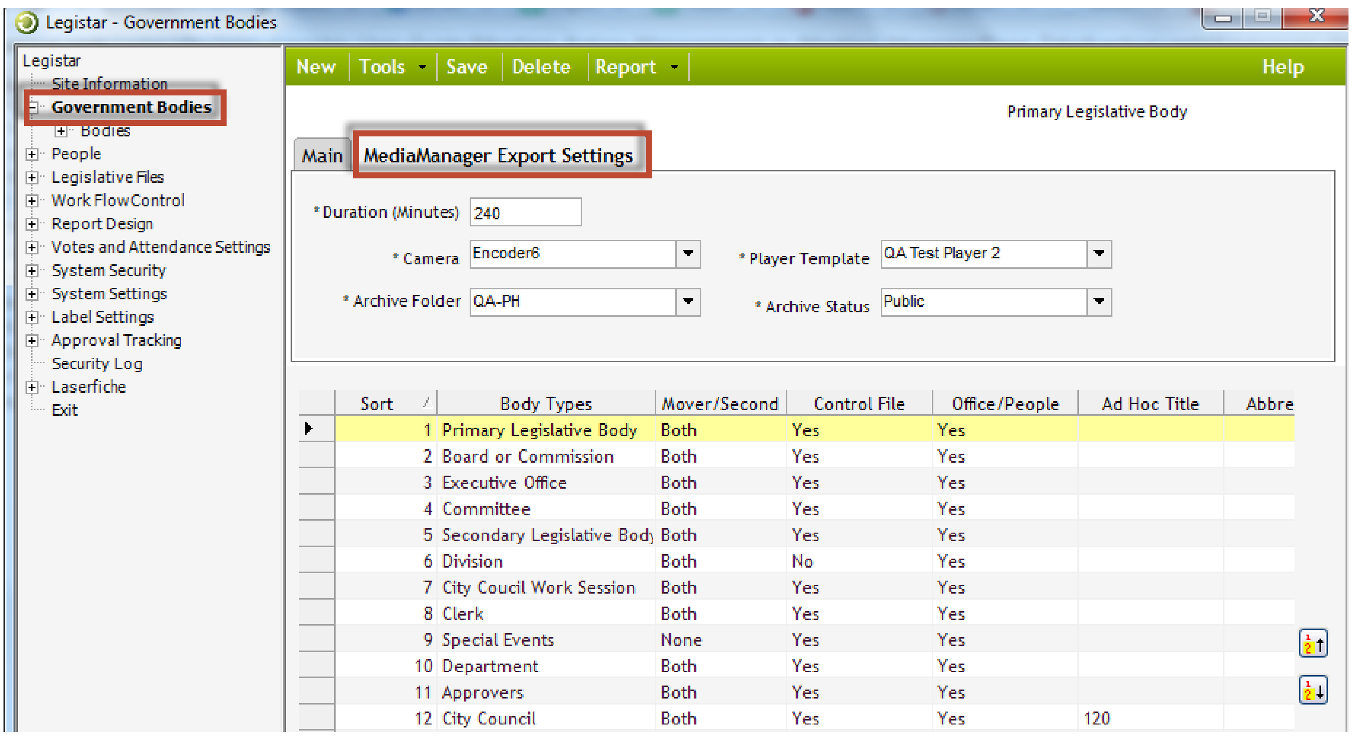
- The **Action** tab contains information on the selected agenda item. When a vote is taken on an item the results can be found within this tab.
- In the **Agenda Note** tab you can record notes that will appear in the Agenda Note field in Legistar. You can choose to make these notes public when you run and publish the Agenda Report.
- In the **Minutes Note** tab you can record notes that will appear as the Action Note in Legistar. You can choose to make these notes public when you run and publish the Minutes Report.

Admin Setup for Meeting Manager

Setup for Importing and Exporting Data to Granicus

Before you can record the meeting's video and actions, you must verify certain settings are enabled in Legistar Admin. Theses settings allow your meeting data to be transferred to MediaManager and communicate with the encoder. You only have to set these settings once for each body type.

1. Launch Legistar Administration.
2. Select **Government Bodies** from the navigation tree on left side of the interface.
3. Click the **MediaManager Export Settings** tab.



MediaManager Export Settings Tab

4. Select the **Body Type** for which you want to apply MediaManager export settings.
5. Enter the **Duration** for your event in minutes. This should be the maximum amount of time you think your event will last. We recommend that you add an hour on to the meeting's expected length.
6. Select the camera from the **Camera** drop-down menu. The camera refers to the encoder that records and transfers live broadcasts to the Granicus DataCenter in real time.
7. Select the video player template from the **Player Template** drop-down menu. The video player template is the web design or “skin” that houses your video player.
8. Select the **Archive Folder** in which you want the video recording of your meeting to reside in MediaManager.
9. Select the status for your video recording from the **Archive Status** drop-down menu. This status will apply to the video after it has been uploaded to Granicus.
   - *Pending* – The uploaded video status that holds the video in a private, intermediate state as you edit and finalize and data. After you’ve completed your editing, you can set the status of the video to *Public* or *Pending*.
   - *Public* - The uploaded video status that allows citizens to view the recorded video of the meeting from your InSite page. You can change the *Public* status to *not-public* or *Pending* at any time.
   - *Not-Public* – The uploaded video status that keeps the video private and available for internal viewing only. You can change the *Not-Public* status to *Public* or *Pending* at any time.

11. Click **Save**.
12. Exit Administration.
13. Select **Tools** > **Refresh Administration** to apply your changes.

Running a Meeting in Meeting Manager

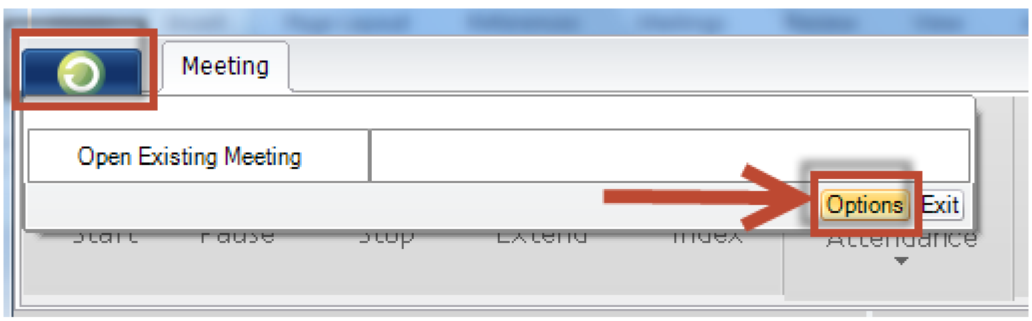
The following instructions explain the recommended workflow for performing meeting tasks in Meeting Manager. However, the structure of your meeting or other factors may require you to use a different workflow than the one described here. Your Granicus Product Trainer can help you develop the best workflow for your meeting procedures.

Launching Public Display

Before your meeting begins, set up another computer installed with Legistar with a connection to a projector. On this second computer, launch Legistar and Meeting Manager, and enable the public display with the following instructions.

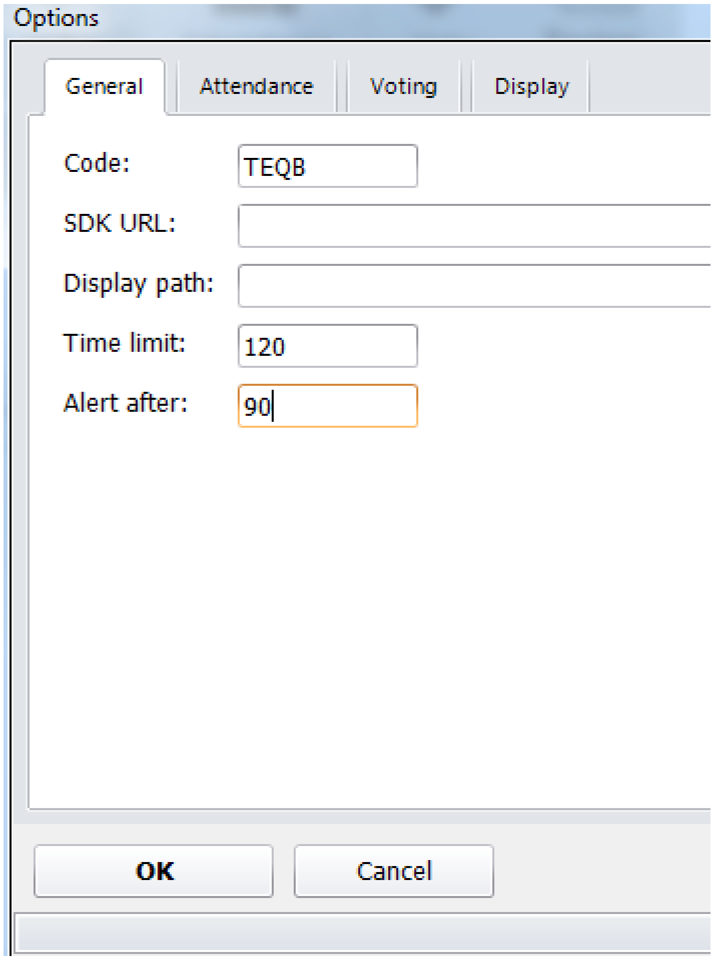
Public Display Settings

1. Click the **Granicus logo** in the top left corner of Meeting Manager and click **Options** from the menu available. (see figure below)



Meeting Manager Options Button

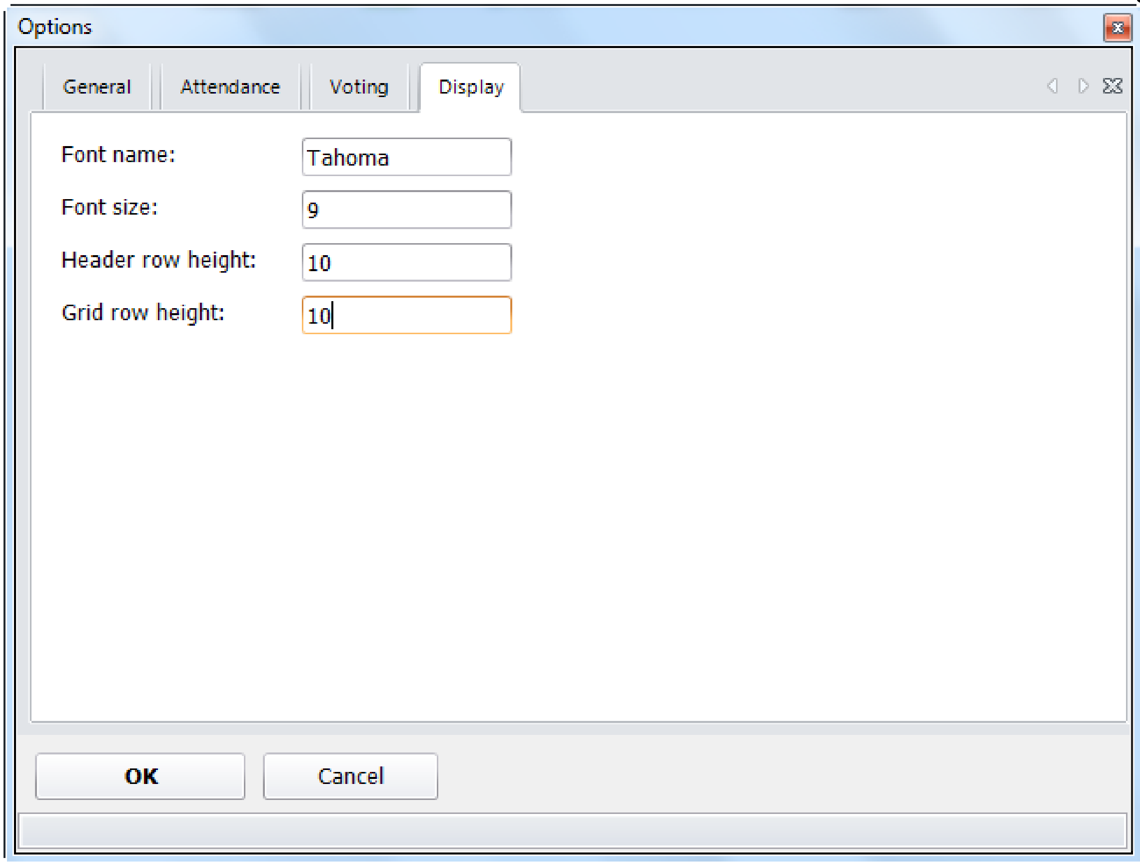
2. Select the **General** tab.



General Tab

- **Time Limit**: Enter an increment of time into the **Time Limit field** to set the amount of time a speaker has, ex. 3:00
- **Alert After**: Enter an increment of time into the **Alert After field** to set at what time the speaker timer will warn the speaker that time is running out, ex. 2:30. The alert counts down from the amount of time entered in the Alert after field; for example, if you want the Alert after to occur where there is 30 seconds remaining of the allotted three minutes, then enter 2:30 in the Alert after field.

3. Select the **Display** tab. You can enter the following settings:



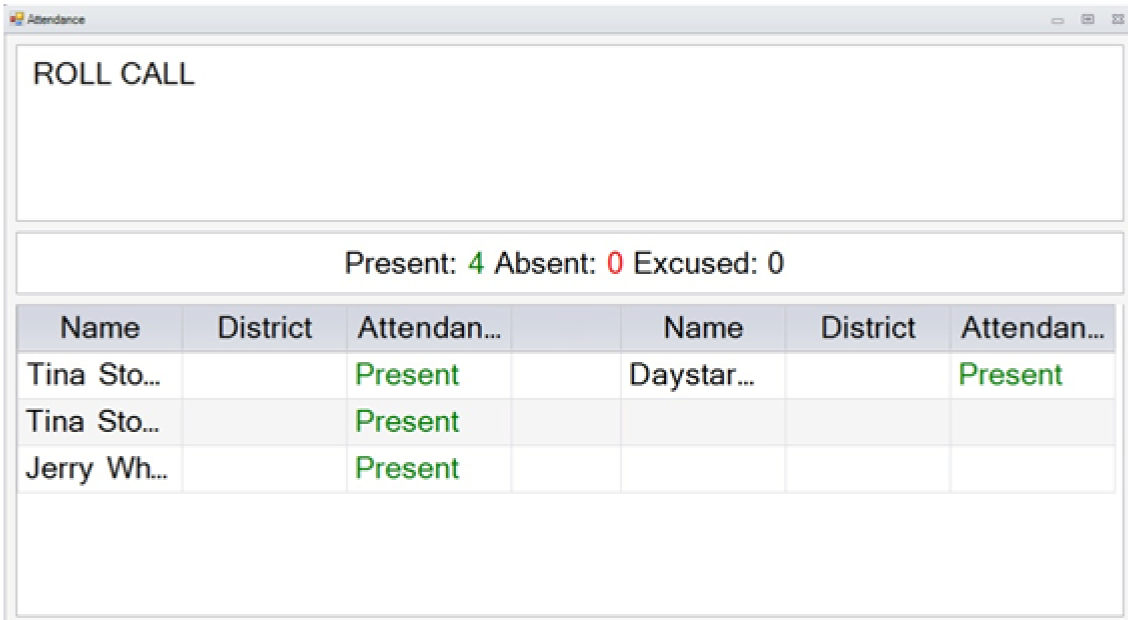
Display Tab

- **Font name**- Enter a font for formatting text in the Display.
- **Font size**- Enter a font size for formatting text in the Display.
- **Header row height**- Enter the height in pixels for the header row.
- **Grid row height**- Enter the height in pixels for the grid row.

4. Click **OK**.

Open the Display

1. Select the **Display** button from the Meeting Manager interface.
2. Confirm that anytime a vote is enabled the results of the vote flash on the public display.



Vote Results Displayed in the Public Display

3. Confirm that anytime the Speaker Timer is enabled a timer begins to countdown on the public display.

Running the Meeting

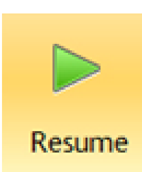
Starting the Meeting

1. Click **Start** to start the encoder.

Start Button

Pausing the Meeting

1. Click **Pause** to stop the recording of the meeting. This will not stop the live stream, however.
2. Click **Resume** (the **Start** button) to start the meeting again.



Resume Button

Extending the Meeting

If the duration time of your meeting begins to run out, use the Extend button to add an additional half-hour to you meeting time. You can use this feature as often as you need to.

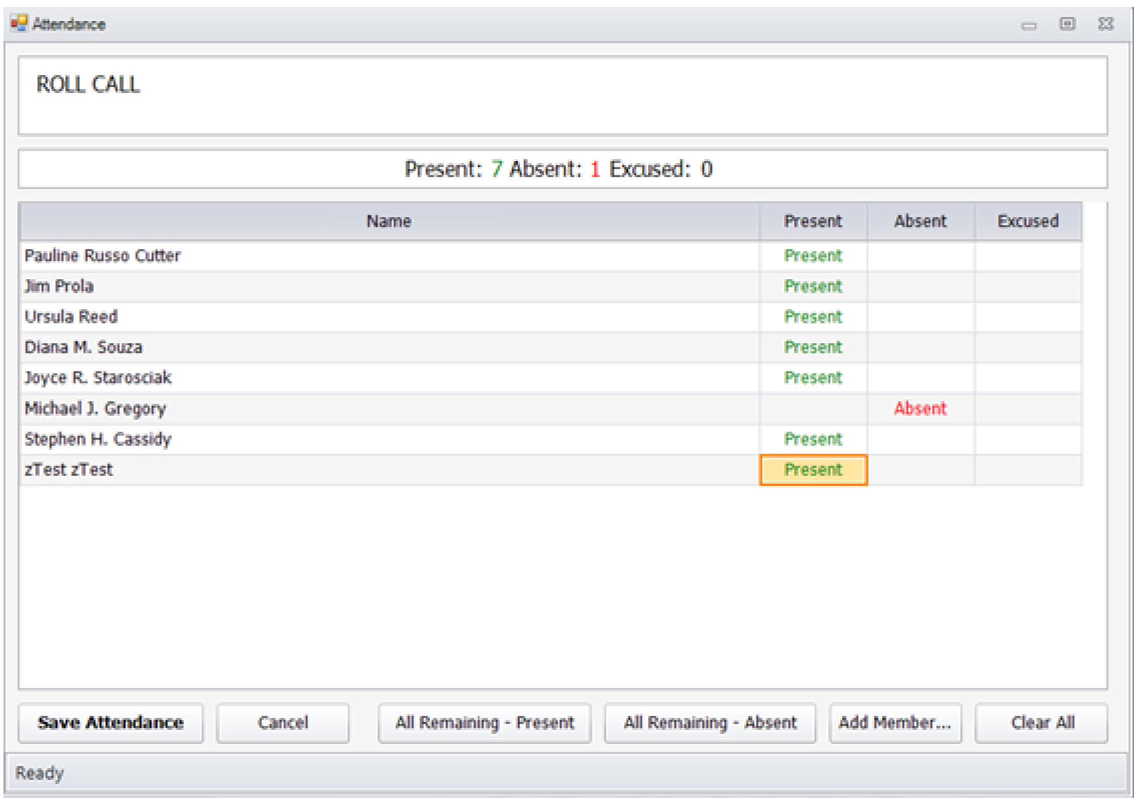
You can see the displayed amount of time remaining in your meeting beneath the Extend Meeting button.

1. Click **Extend** to add 30 minutes on to the meeting's duration.

Recording Attendance

You have to record the attendance of meeting members in order to record votes later in the meeting. Record Attendance allows you to select individual attendance statuses for each meeting member.

1. Select the agenda item on which you want to index attendance. Generally, this is the Roll Call item.
2. Click the **Attendance** button.
3. Select **Record Attendance**, **All Present,** or **All Absent**.
4. Select the individual meeting **Status** for each member. Select the least popular meeting statuses. Next, select **All Remaining- Present** or **All Remaining – Absent** to complete the attendance.
5. Click the **Save Attendance** button.

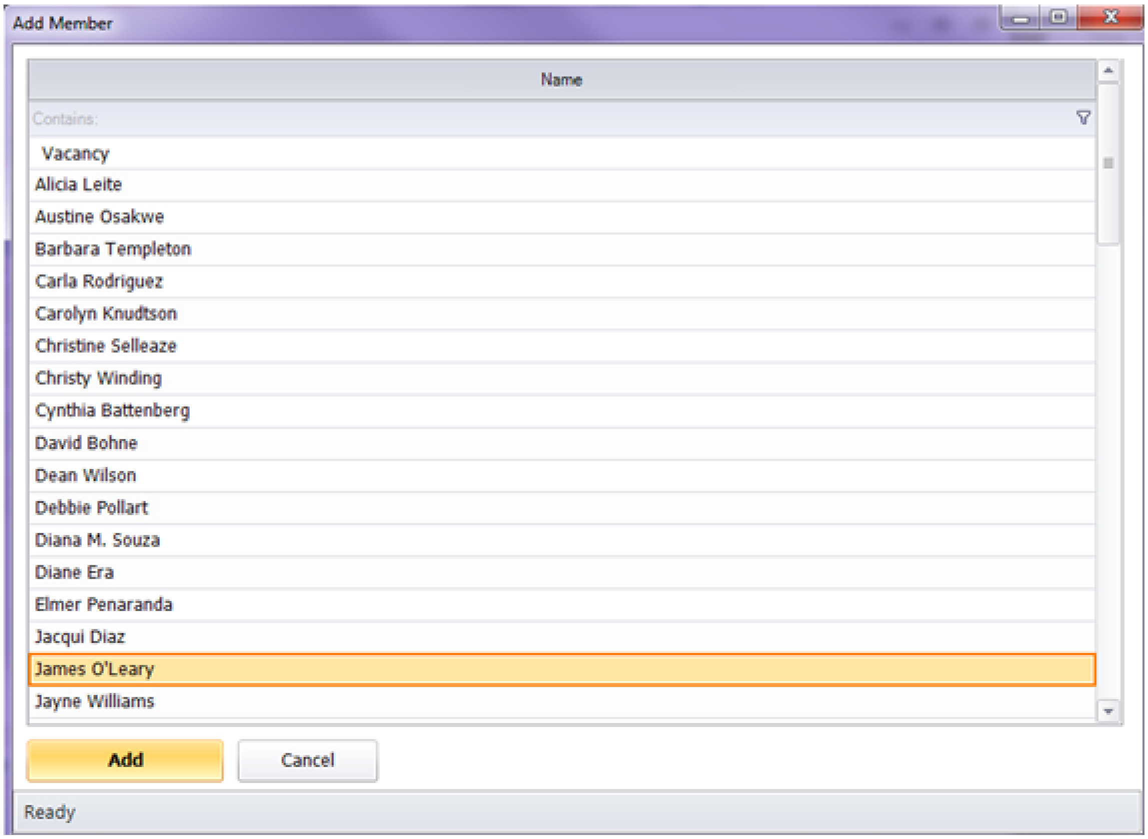


Recording Individual Attendance

Adding Meeting Members

You can add a meeting member on the fly by using the Add Member feature in Meeting Manager. The Add Member list is populated by the meeting member profiles entered in Legistar Admin. For more information on creating meeting member profiles and assigning them to meeting bodies, refer to your Admin User Guide.

1. Click the **Attendance** button within Meeting Manager.
2. Click **Add Member**.
3. Select a name from the meeting Add Member list.
4. Click **Add**.



Adding a Member

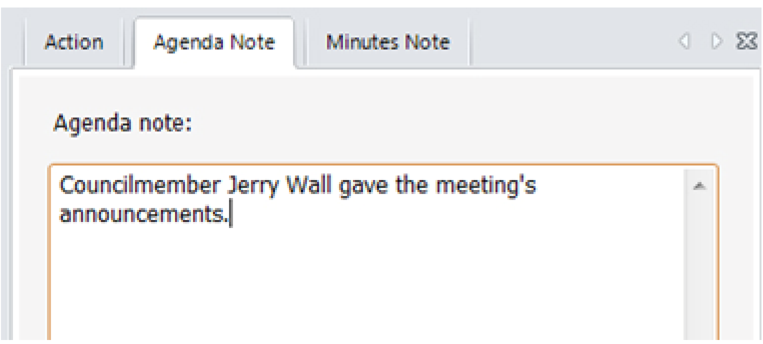
5. Confirm the name was added to the Attendance list.
6. Click **Save Attendance**.

Recording Actions in Meeting Manager

Recording Notes

Agenda Notes appear in the Agenda Note field in Legistar. These notes will not become public until you publish the Agenda Report. Minutes Notes appear in the Action Note field and will not become public until you publish the Minutes Report.

1. Select an agenda item.
2. Click the **Agenda Note** tab to enter a note on the agenda or the **Minutes Note** tab to enter a note on the minutes.
3. Enter text in the center pane.



Entering an Agenda Note

Recording a Speaker

1. Index the agenda item relevant to the speaker's discussion.
2. Record a note capturing the speaker's information.
3. Click the **Start Timer** button to begin the speaker timer.
4. Click the **Stop Timer** button to stop the speaker timer.

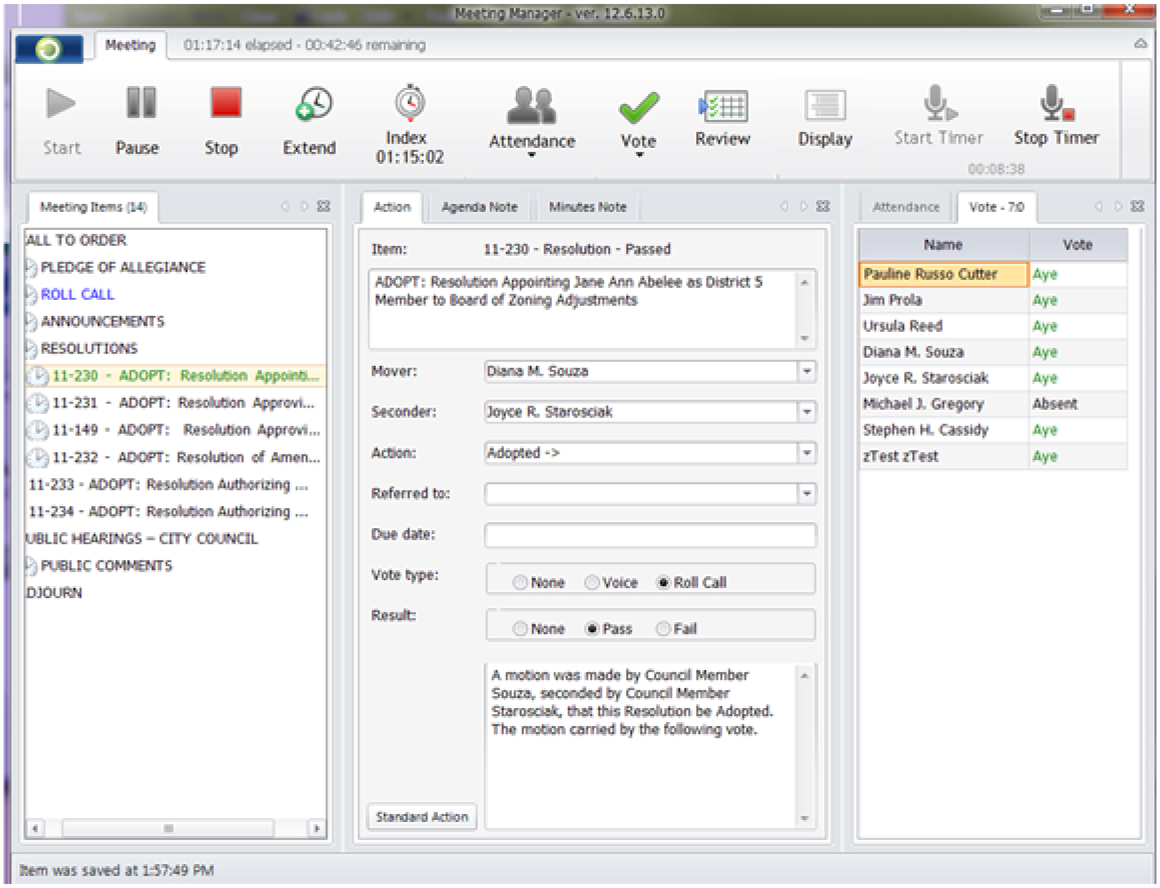
Speaker Timer Buttons

Recording Actions

Recording a Unanimous Vote

1. Index the agenda item on which you want to record an action.

2. Select **Mover** and **Seconder** from the appropriate drop-down menus.
3. Select theaction from the **Action** drop-down menu.
4. Select a **Referred to option** if necessary.
5. Select **Roll Call – All Yes** or **All No**.
6. Make any necessary edits to the **Note** field.

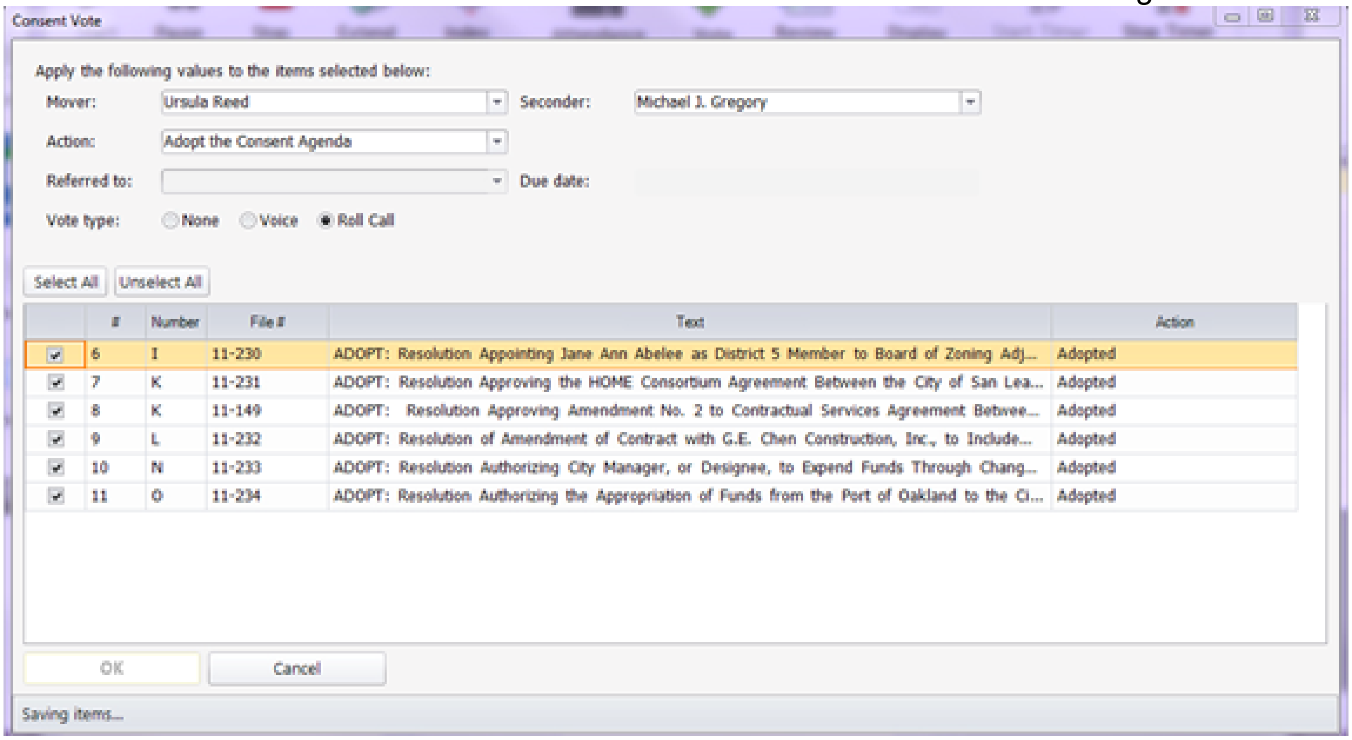


Recording a Unanimous Vote

Marking an Item for Consent

Generally, you will have already marked items for consent in Legistar. If you have not, right-click the agenda item > select **Mark All Items as Consent**.

1. Index the agenda item header marked for consent.
2. Select **Vote > Consent Action/Vote**.
3. Select the **Mover, Seconder, Action, Vote type,** then click **OK** to apply the standard action to all files selected.
4. Click **OK** to apply to consent vote.



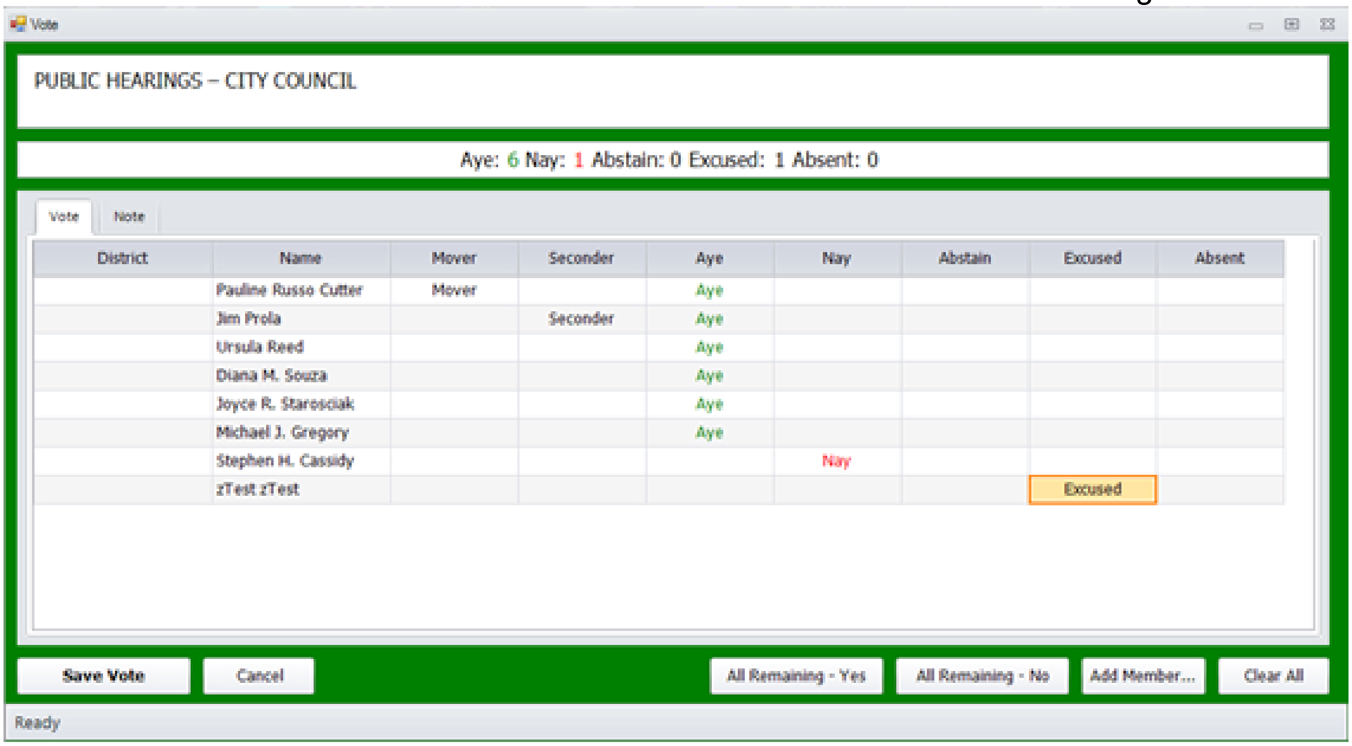
Consent Vote Menu

Removing a File from the Consent Agenda

Occasionally, someone may request that an item marked as a consent item be removed from the consent agenda. To remove an item from the consent agenda, right-click the item and select **Unmark this Item as Consent** from the context menu available.

Recording Multiple Actions on an Item

1. Index the agenda item on which you want to record multiple actions.
2. Select the action from the **Action** drop-down menu.
3. Select a referral from the **Referred to** drop-down menu if needed.
4. Click **Vote > Roll Call – New Vote**.
5. Select te **Mover** and **Seconder** from the **Vote** menu.
6. Select the **vote results** for each meeting member.
7. Click **Save Vote** .

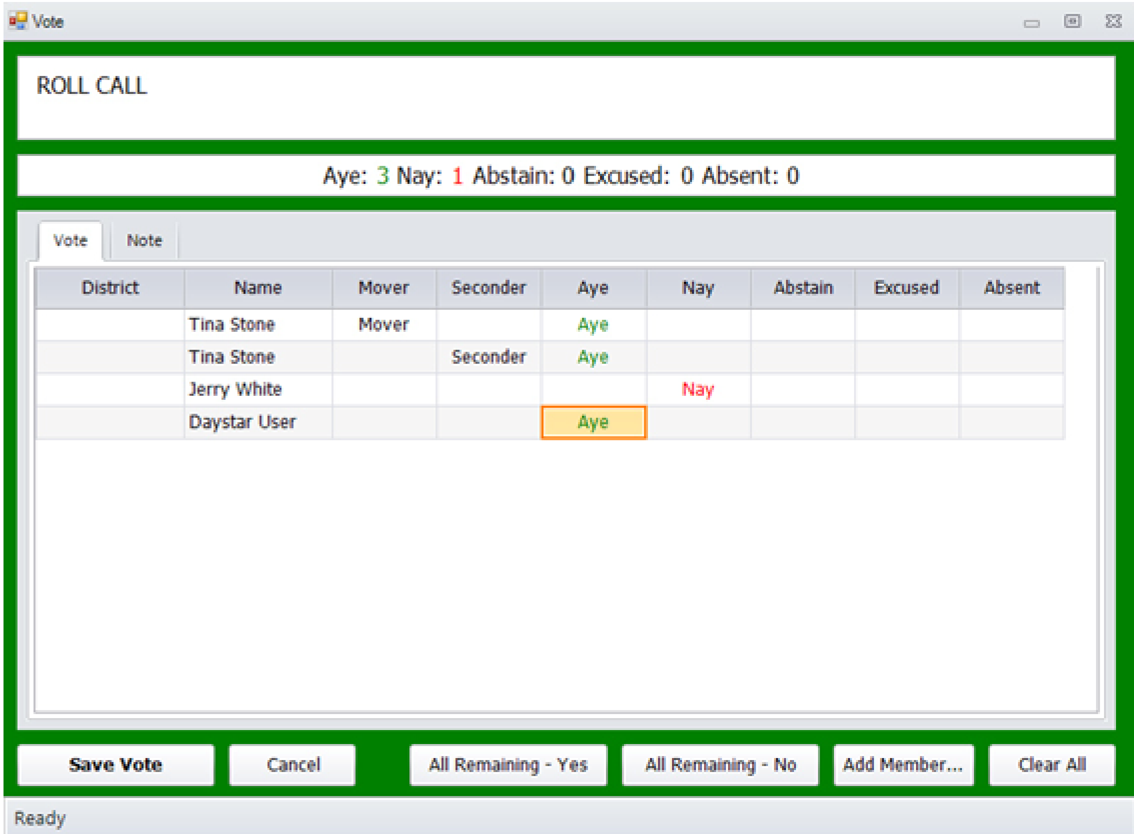


Recording the Vote in the Vote Task Window

9. Exit the Vote Task window.
10. Enter any additional information in the note field.
11. Right-click the **agenda item** and select **duplicate this item**.
12. Confirm the item is duplicated.

Recording a Roll Call Vote

1. Select the **agenda item** on which you want to record an action.
2. Select the **action** from the Actions menu.
3. Click **Vote >** select the **Roll Call – New Vote** option (to record individual votes), **Roll Call- All Yes**, or **Roll Call-All No**.
4. Select the **Mover** and **Seconder** in the vote window.
5. Select the **vote results** for each meeting member.
6. Click **Save Vote**.
7. Enter any additional information in the Notes field of the Actions tab.

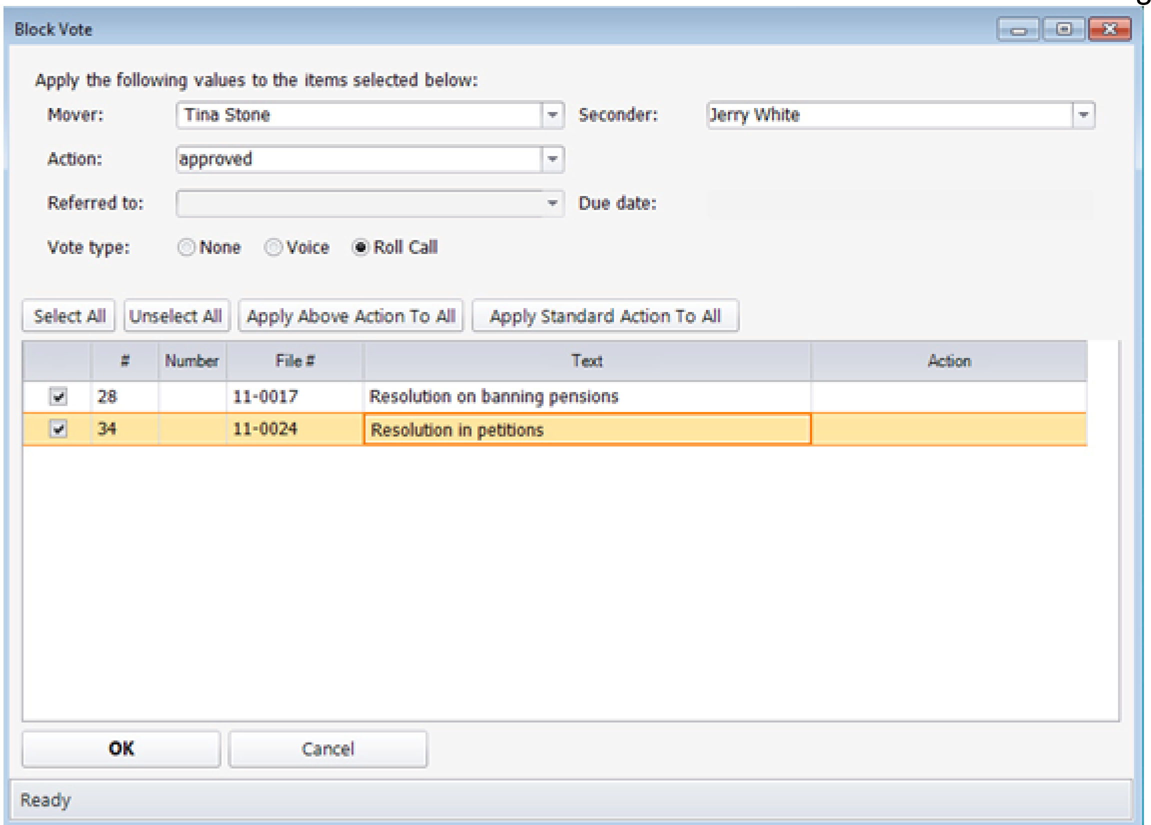


Recording a Roll Call Vote

Recording a Block Vote

A Block vote must be unanimous in its results. Block votes will be identified in orange in the Agenda pane.

1. Index a header (parent) item.
2. Select **Vote** > **Block Action/Vote**.
3. Select the **Mover**, **Seconder**, and **Action** from the appropriate drop-down menus.
4. Select the **Referred to option** and **Due Date** if necessary.
5. Select the **Select all** button or the **individual items** for applying to the Block vote.
6. Select **Apply Above Action to All** or **Apply Standard Action to All** to apply each Legislative File's individual standard action. The standard action is set in **Admin > Legislative Files.**
7. Click **OK**.

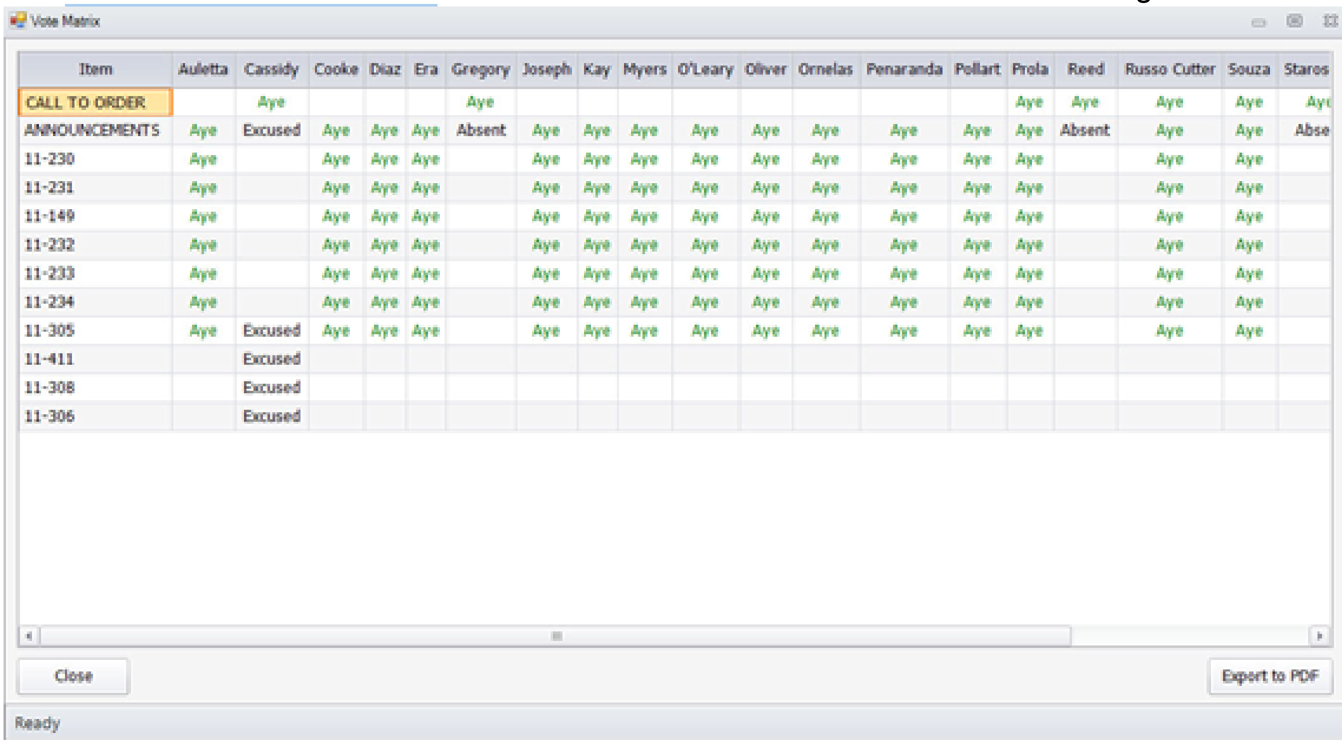


Recording a Block Vote

Reviewing Votes

After Roll Call votes have been recorded you can go back and review the votes’ results.

1. Click **Review Votes**.
2. Review the votes in the Vote Matrix window.
3. Click **Export the votes to a PDF**(optional). The PDF should automatically open in Adobe Reader.
4. Click **Close**.



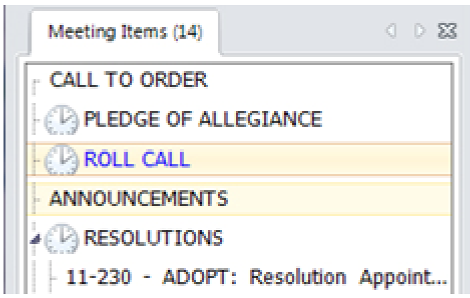
Item	Auletta	Cassidy	Cooke	Diaz	Era	Gregory	Joseph	Kay	Myers	O'Leary	Oliver	Ornelas	Penaranda	Pollart	Prola	Reed	Russo Cutter	Souza	Staros
CALL TO ORDER		Aye				Aye									Aye	Aye	Aye	Aye	Ay
ANNOUNCEMENTS	Aye	Excused	Aye	Aye	Aye	Absent	Aye	Aye	Aye	Aye	Aye	Aye	Aye	Aye	Aye	Absent	Aye	Aye	Abse
11-230	Aye		Aye	Aye	Aye		Aye	Aye	Aye	Aye	Aye	Aye	Aye	Aye	Aye		Aye	Aye	
11-231	Aye		Aye	Aye	Aye		Aye	Aye	Aye	Aye	Aye	Aye	Aye	Aye	Aye		Aye	Aye	
11-149	Aye		Aye	Aye	Aye		Aye	Aye	Aye	Aye	Aye	Aye	Aye	Aye	Aye		Aye	Aye	
11-232	Aye		Aye	Aye	Aye		Aye	Aye	Aye	Aye	Aye	Aye	Aye	Aye	Aye		Aye	Aye	
11-233	Aye		Aye	Aye	Aye		Aye	Aye	Aye	Aye	Aye	Aye	Aye	Aye	Aye		Aye	Aye	
11-234	Aye		Aye	Aye	Aye		Aye	Aye	Aye	Aye	Aye	Aye	Aye	Aye	Aye		Aye	Aye	
11-305	Aye	Excused	Aye	Aye	Aye		Aye	Aye	Aye	Aye	Aye	Aye	Aye	Aye	Aye		Aye	Aye	
11-411		Excused																	
11-308		Excused																	
11-306		Excused																	

Reviewing a Vote

Indexing in Meeting Manager

Indexing agenda items syncs your meeting's agenda with specific reference points in the meeting video. This allows citizens to select an agenda item from your published agenda and then view the corresponding time in the meeting video in which the agenda item was discussed.

1. Double-click an agenda item to index it. Each indexed item is marked with a clock icon.



Indexed Agenda Items

Indexing Notes and Best Practices

- You can also index an item by selecting the item and clicking **Index**.
- Indexing the first and last agenda items is a good idea as it records in your meeting video where the meeting begins and where it ends.
- The indexes you create during the meeting are not permanent. You have the options to edit all indexes after the meeting.

Stopping the Meeting

1. Click **Stop** to end the recording and streaming of the meeting.You have now finished recording your meeting. Click the **exit button** in the top right-hand corner to close Meeting Manager.

Warning! You should only click the Stop button when you are absolutely sure your meeting is over.

Meeting Finalization in the Minutes Module

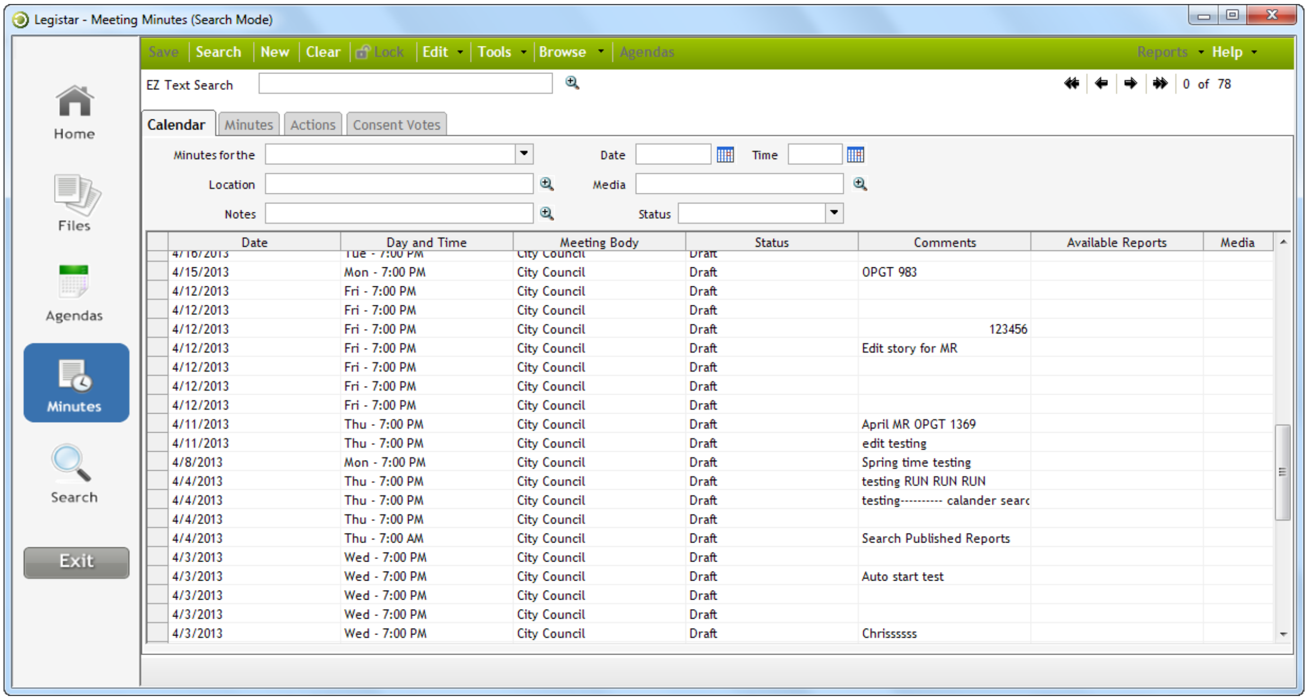
Overview

From the Minutes module you can create new and open existing minutes documents. Within the minutes document, you can edit and record the meeting video and actions taken on agenda items during the meeting, process consent votes, and take notes. When you're finished reviewing your minutes, you can publish the minutes and meeting video to InSite.

>>Next Section: Navigating the Minutes Module

Navigating the Minutes Module

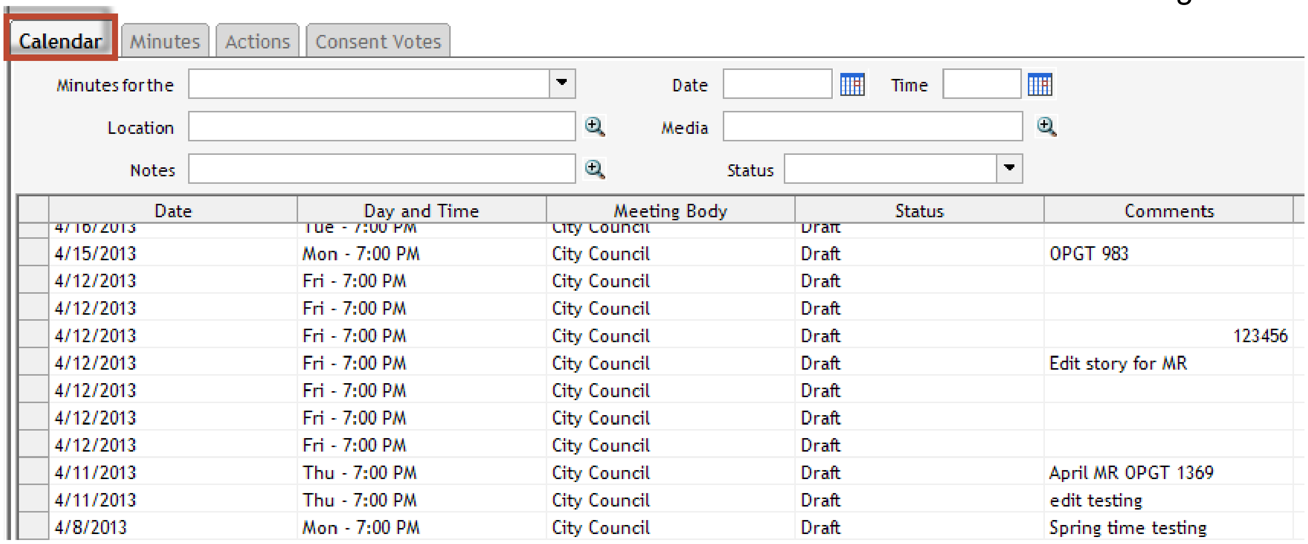
1. Click **Minutes** on the left-hand side of the Legistar interface. The Minutes Module opens.



The Minutes Module

The Calendar Tab in the Minutes Module

When you select the Minutes button, the Minutes Module opens on the Calendar tab (see figure below). The Calendar interface allows you to view the most recent minutes documents from meetings that occurred within the last 90 days. From this tab, you can search for a particular minutes document by selecting and entering criteria from the available fields.



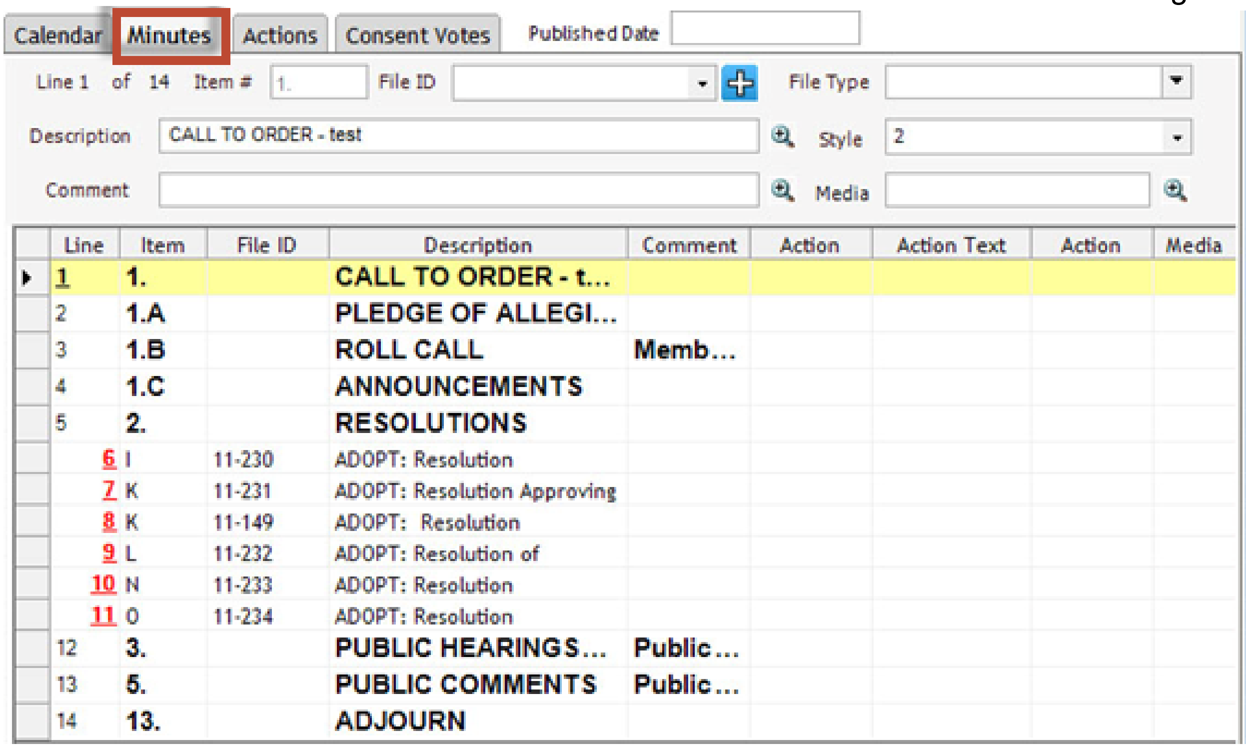
The Calendar Tab

Item	Description
Minutes for the	Limits your minutes search results to those for a particular meeting body
Location	Allows you to search for the minutes by the location of where the meeting occurred
Notes	Allows you to search for the minutes by any notes entered in the field
Date and Time	Allows you to search for the minutes based on the previously set minutes date and time
Media	Displays information on connecting to Granicus video
Status	Allows you to search for the minutes per the status of the minutes document.

The Minutes Tab in the Minutes Module

The features in this tab allow you to generate or manually create minute lines. From this tab you can also move lines, add and delete lines, auto-number, and run reports.

To enable the Minutes tab, you have to double-click a meeting on the Calendar tab, or click the **New** button to generate a new Minutes document. The Minutes tab should open automatically; if it doesn’t, click the **Minutes** tab.

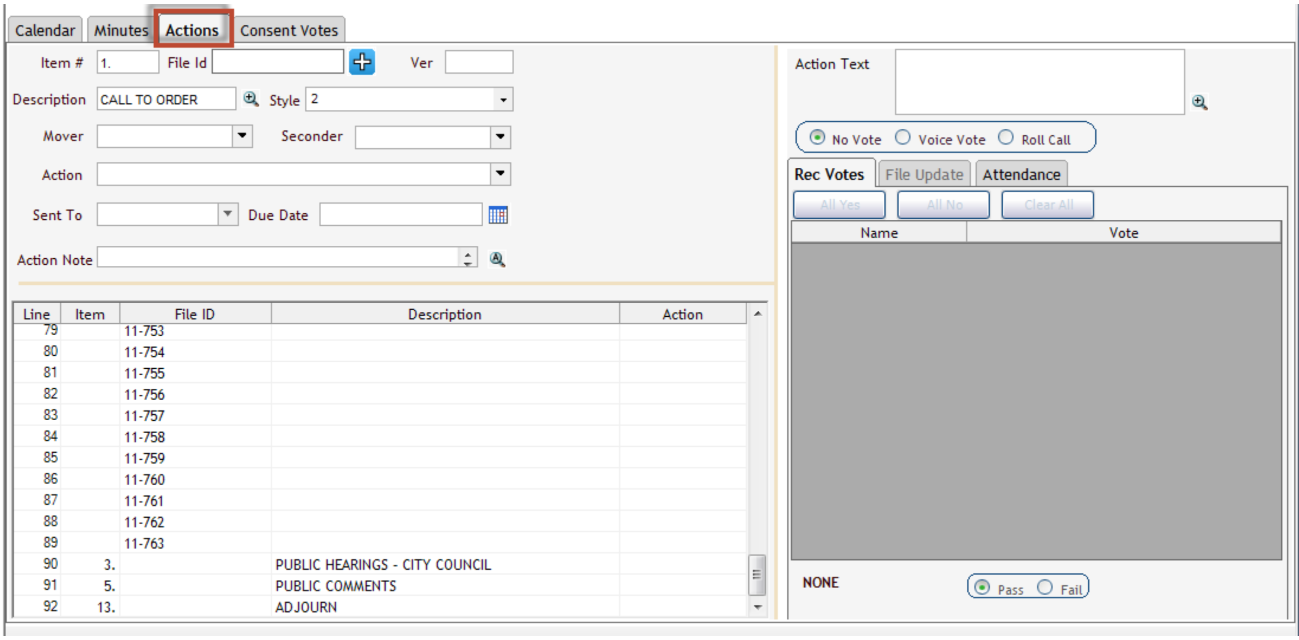


The Minutes Tab

Item	**Description**
Published Date	The date that the agenda was published to InSite
Item #	The Item numbers for headers don't print on the agenda or minutes and shouldn't be changed. Item numbers are carried over from the agenda
File ID	The unique number of the legislative file
File Type	Describes the file type for a legislative file. File types include appointment, closed session, resolution, proclamation, etc.
Description	Explanation of the legislative file
Comment	Any notes left for the staff on a particular legislative file
Style	Formatting options for the legislative file header
Media	Displays information on connecting to Granicus video

The Actions Tab in the Minutes Module

The Actions tab is used to enter roll call, actions, discussion notes, and Action text. This tab is not used for adding lines or marking lines for a consent vote; these functions must be done from the Minutes tab. This tab contains three sub-tabs on the right-hand portion of the screen.



The Actions Tab

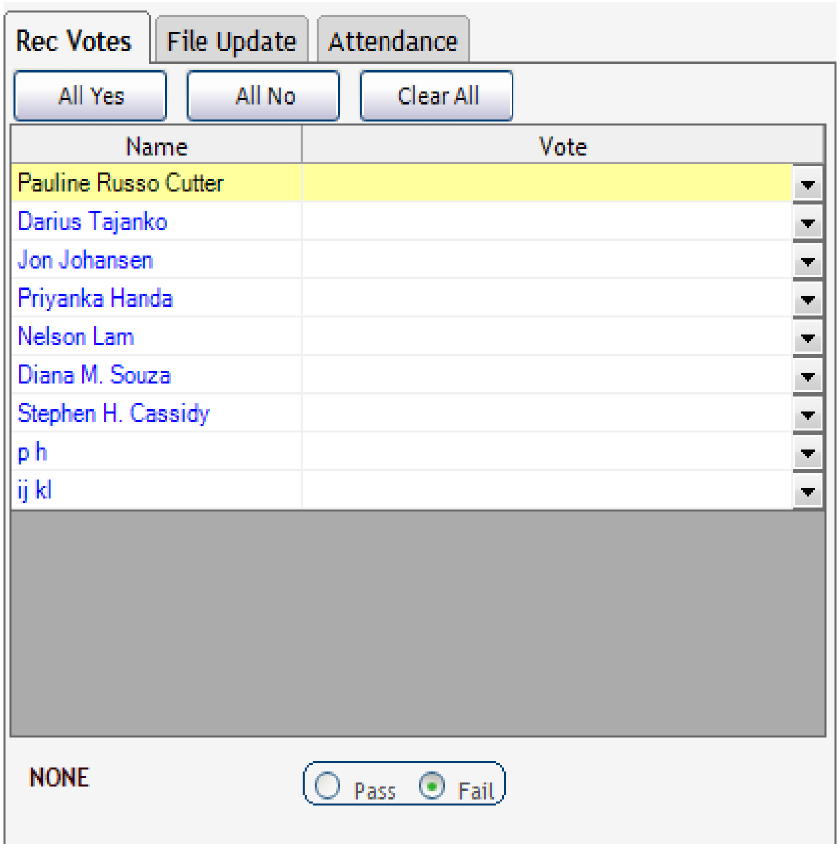
Item	Description
Item #	Lists the item number of the legislative file. These do not print on the agenda and should not be changed. Item numbers carry over from the agenda
File ID	Lists the File ID of the legislative file, but is blank for header items
Ver	Version of the file connected to a Legislative File; determines which version prints on the Minutes report. If an amendment is made that causes a new version to be created, the first item line should contain the old version number, and the second line should have the new version number
Description	Contains the text of the header; may also contain code to print a paragraph on the agenda or minutes reports. On lines associated with items, displays the File Name, which will not print on the agenda report
Style	Controls the font size and formatting for the header when it appears on the agenda report. This field is not active on lines associated with legislative files
Mover	Allows you to select the Mover on an agenda item from a pre-populated list set in Admin

Seconder	Allows you to select the motion Seconder from a pre-populated list
Action	The result of a motion and vote taken on an agenda item
Sent to	The Sent To field shows the body the item is being referred to, and will set that body as the Controlling Bodyfor that item. It is inactive unless the action calls for a target body
Due Date	The Due Date is the date by which a response to a referral is required
Action Note	The Action Note is any text on the discussion of the file or header
Time Index	Point at which the agenda item is marked to sync with the video recording of the meeting
Action Text	This is the motion string of the action generated by Legistar. It can be modified for a specific line if a line requires any special verbiage

The Rec Votes Subtab

Rec (short for Record) Votes is the subtab used to enter the results of the vote on the selected line. When you select the Roll Call option as your vote type, this section loads a list of the meeting members as recorded in attendance. If any members are absent, this screen will reflect attendance status. You will not be able to record any actions or votes until after roll call has been entered.

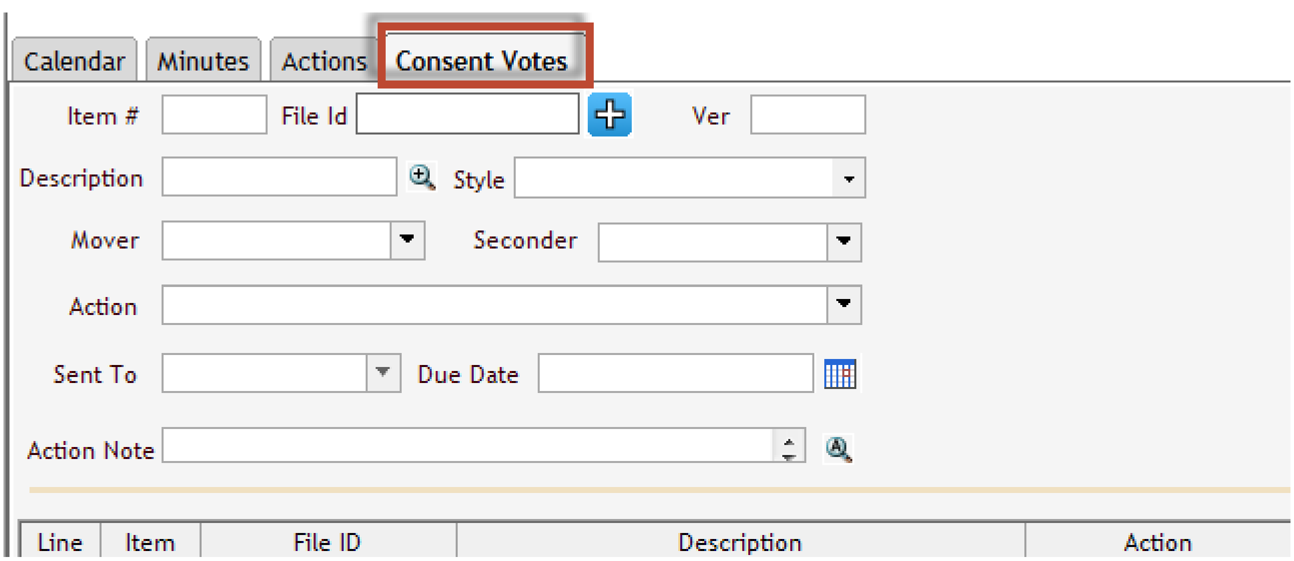
Votes are entered by clicking on the box to the right of the voting member and selecting the correct vote taken by that member.



The Rec Votes Subtab

The Consent Votes Tab

Consent Votes, sometimes called batch votes, allow actions to be taken on several items at once with only one vote. The system will automatically take the action that is designated in Administration as the Standard Action for each type of matter.



The Consent Votes Tab

>>Next Section: Editing the Meeting Actions, Video, and Timestamps

Editing the Meeting Actions, Video, and Timestamps

Minutes Review Overview

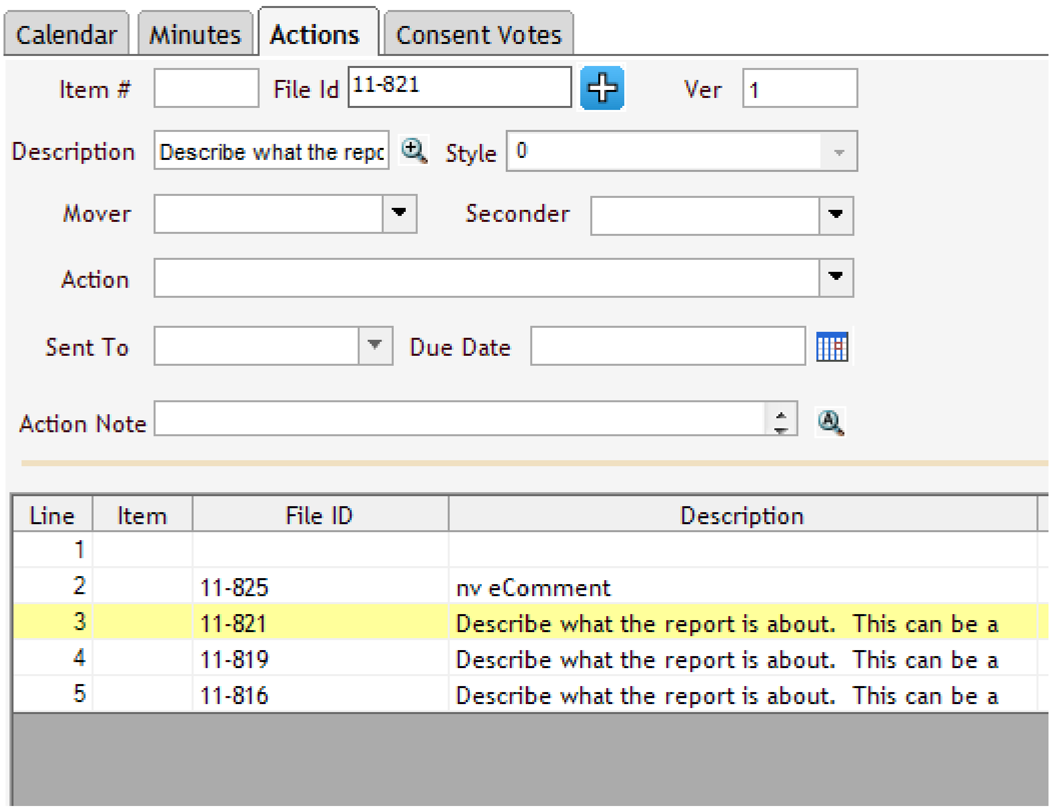
As soon as the agenda is generated, the document duplicates and the new copy becomes the minutes form. It is important to keep in mind that the minutes form is a draft and is not your final minutes document. You will use the minutes form for recording the actions and notes of the meeting.

After the meeting has occurred, the meeting's events are recorded in the minutes form. These events include the motions, votes, notes, and other actions from the meeting. You can also enter detailed information and dialogue into the minutes form. Immediately following the meeting, you can create a summary report to distribute to meeting members.

>>Next Section: Editing Meeting Actions

Editing Meeting Actions

1. Open your recent meeting from the Minutes module.
2. Select the **Actions** tab.
3. Select the agenda item you wish to edit. From here you can enter or edit additional information in the available fields or change the vote or attendance results.



Editing an Agenda Item in the Minutes Module

4. Click **Save**.

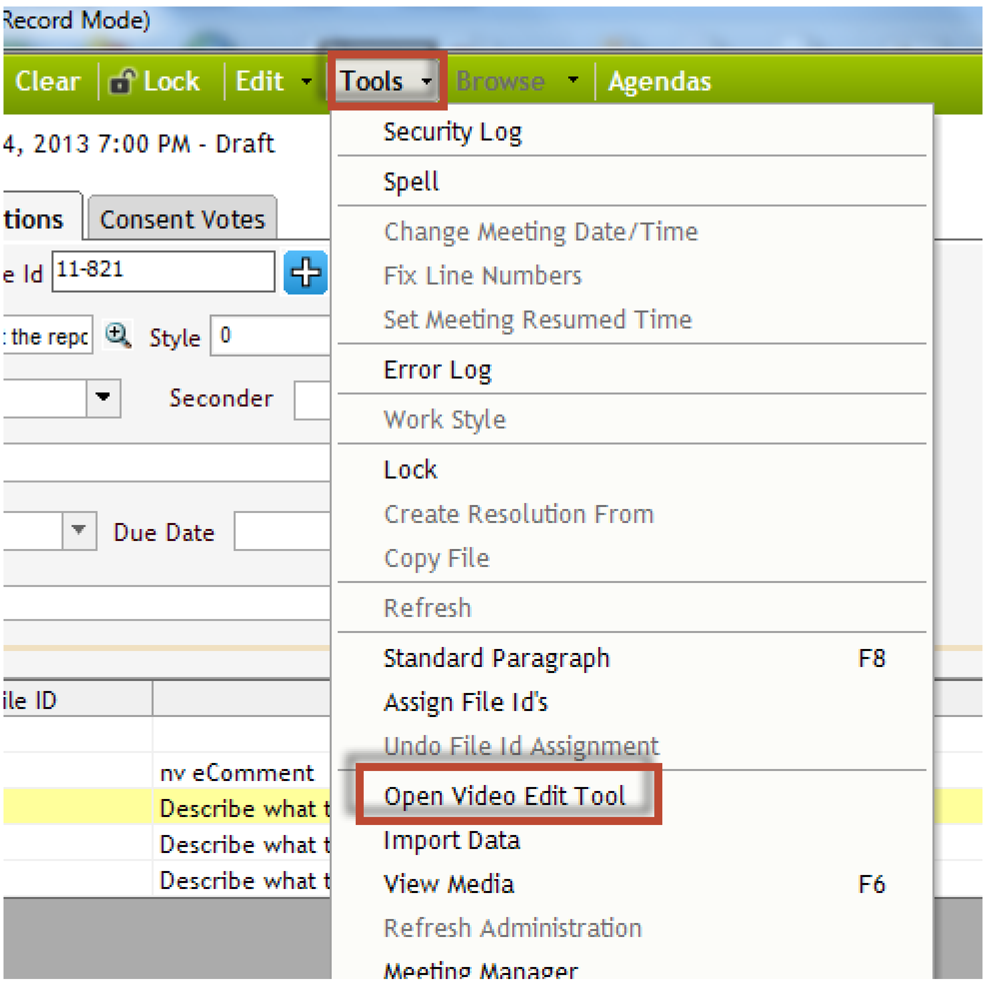
>>Next Section: Editing Meeting Video

Editing Meeting Video

Viewing Playback of the Meeting

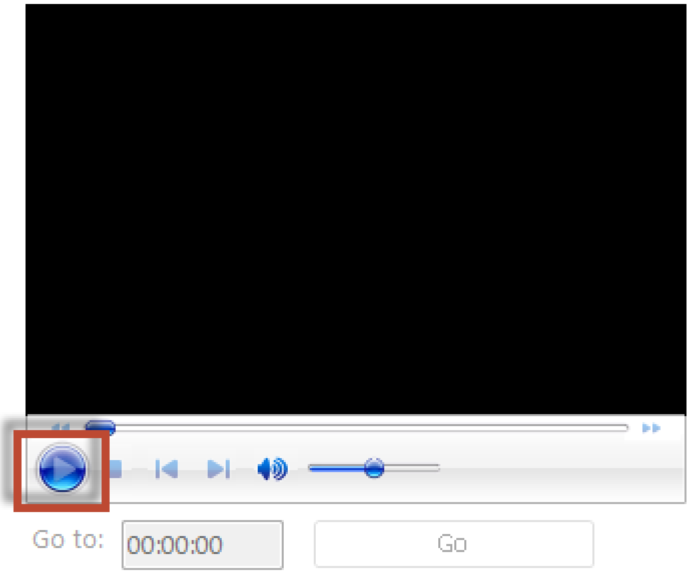
You can use the Meeting Manager feature to play back video of your meeting; this is helpful for when you are editing indexes, notes, and other meeting data.

1. Select **Tools** > **Open Video Edit Tool**.



Opening the Video Edit Tool

2. Click **Play** in the video player window.

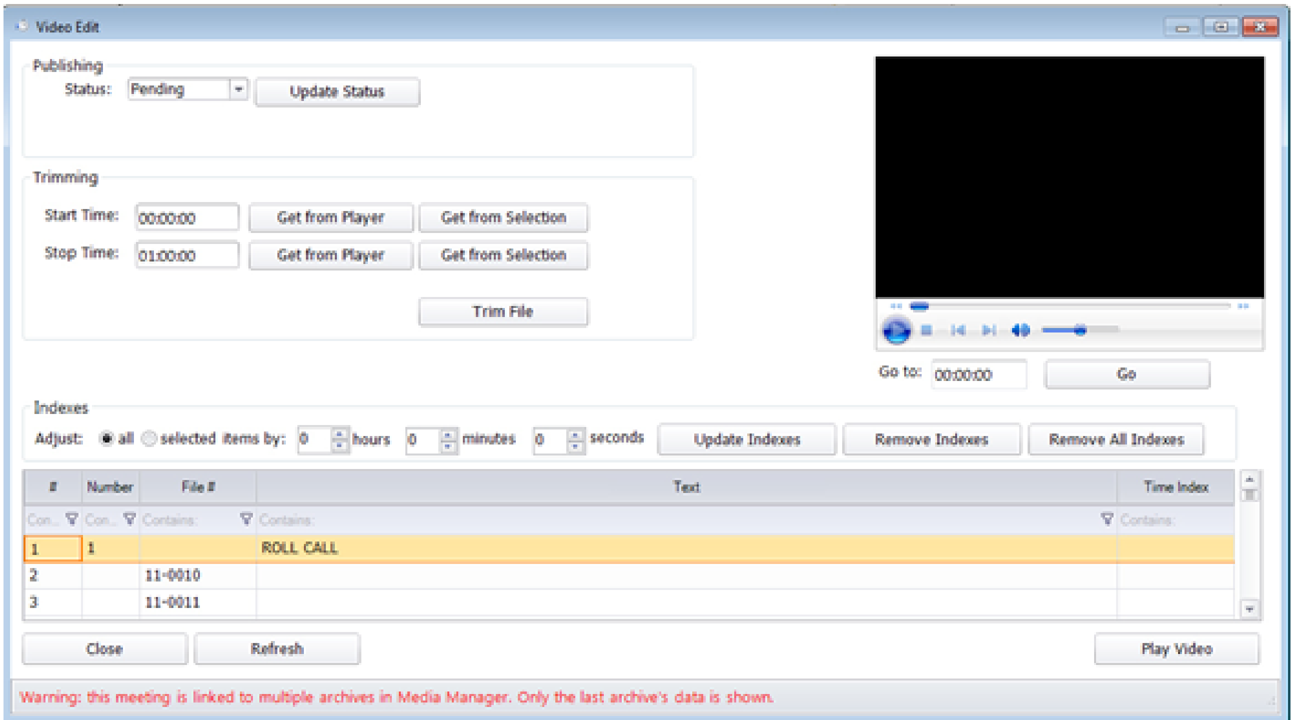


The Play Button

Trimming the Video Archive

Using this feature, you can remove unwanted sections of your video archive and apply a new start and end time.

1. Click **Play** in the video player.
2. Click **Play** again to pause the video at the time you want to set as your start time.
3. Click the first **Get from Player** button to record the start time.
4. Repeat steps one and two to locate the stop time.
5. Click the second **Get from Player button** to record the stop time.
6. Click **Trim File** to finalize your video trim.
7. Click **Play Video** to review your trimmed file.



The Video Edit Window

The Recycle Bin and Trim Tool

Every time a trim is generated on an archive, the system automatically creates a copy of the original archive and places it in the Recycle Bin in Granicus MediaManager. The title of the auto-saved archive appears with the words (Auto-Generated Trim Backup) in the title.

Warning! Whenever an archive is moved into the Recycle Bin, the system permanently deletes any archives 14 days or older in the Recycle Bin. These deleted files are not recoverable.

Recovering Your Original Video Archive File

If you make a mistake when trimming your video file and would like to recover the original file, complete the following steps.

1. Launch your Granicus site at jurisdiction.granicus.com, ex. cityofsanfrancisco.granicus.com.
2. Click the **Archives** tab.
3. Click the **Recycle Bin** at the bottom of the Archive Folders list.

4. Select the **archive** to be restored.
5. Click the **Undelete** button.
6. Confirm the Basic Properties screen opens.
7. Select the folder where the archive should appear from the **Folder** drop-down menu.
8. Click **Save Properties**.

>>Next Section: Editing Meeting Timestamps

Editing Timestamps (Indexes)

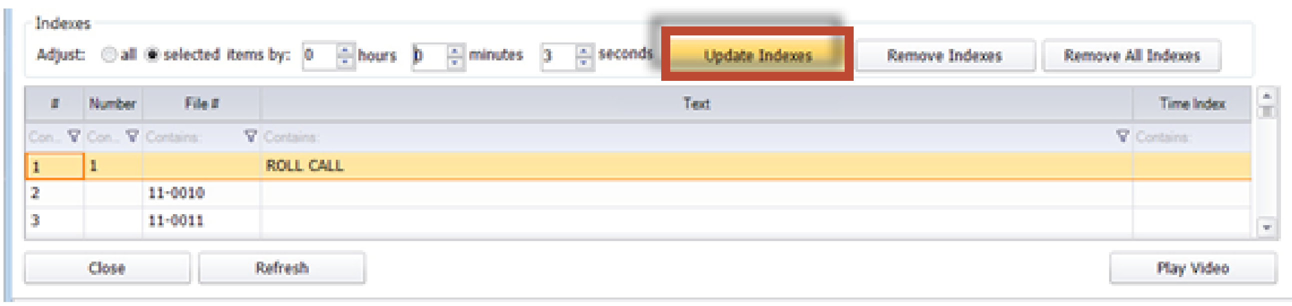
Editing Indexes

The Edit Indexes feature allows you to adjust the index syncing an agenda item with the recorded video.

Adjusting All Indexes

A feature in the Video Edit tool allows you to simultaneously adjust all of the indexes.

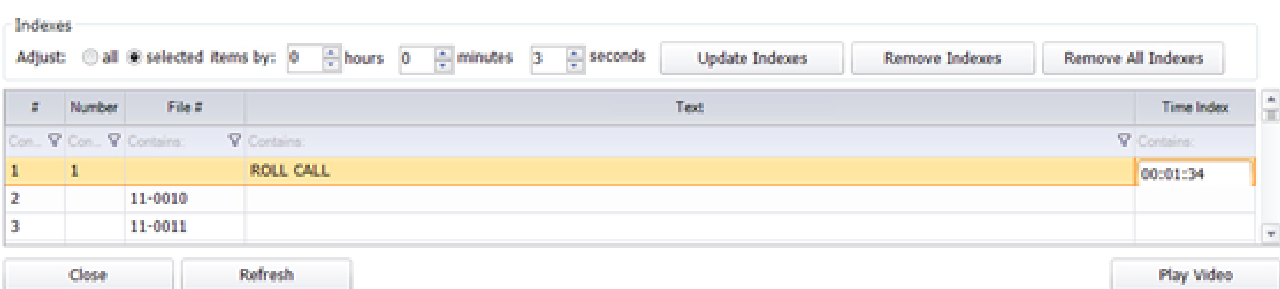
1. Select the **Selected items by** option.
2. Enter the amount of time for which you want to update the indexes.
3. Click the **Update Indexes button**.



The Update Indexes Button

Adjusting Individual Indexes

1. Select an agenda item with a corresponding index.
2. Click inside the **Time Index** field.
3. Enter a new increment of time in the **Time Index** field.



Updating Individual Indexes

4. Click the agenda item again to set the new index.
5. Click **Close**.

Remove Selected Indexes

1. Select an agenda item with an index.
2. Press the **Ctrl** key and select additional **agenda items with indexes** (optional).
3. Click the **Remove Indexes** button.

Remove All Indexes

1. Click the **Remove All Indexes button**. This will remove all of the indexes within the indexed agenda items.

>>Next Section: Publishing Minutes and Video

Publishing Minutes and Video

Setting the Minutes Status to Final

When the minutes document is generated, the status of the document is set to *Draft* to prevent other users from viewing the minutes until the status is manually changed to *Final*.

Setting up Minutes for InSite

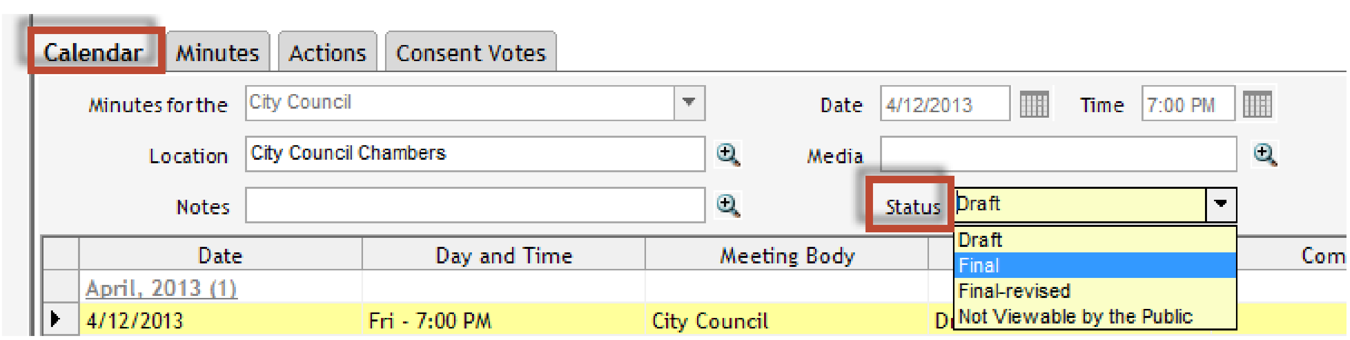
After the minutes are finalized, several processes occur automatically:

- When you create the minutes document without adding items, a notice of the upcoming meeting is put on the InSite page.
- The Meeting Details link within the Calendar tab on InSite becomes a hyperlink as soon as the minutes' status is set to *Final*. If you do not want the meeting details to be available, keep the status if the minutes in *Draft*.
- The Meeting Details hyperlink lists all of the minutes' legislative files without the headers of the Minutes document.
- Minutes reports are not available until they are posted to the InSite page using the Publish to Calendar option in Reports.

Publishing the Minutes to InSite

In order to make the agenda or minutes report available to the public through InSite, the report must be published.

1. Select the minutes document you wish to publish.
2. Select the **Calendar** tab**.**
3. Set the meeting **Status** to *Final*.



Setting the Meeting Status to Final

4. Click the **Reports** button to choose the report you want to run.
5. Set the **Destination** to *Publish to InSite Calendar(PDF)*.
6. Click **Run** to run the report. Legistar runs the report and makes a copy available to the public on InSite.

>>Next Section: Publishing to InSite

Publishing to InSite

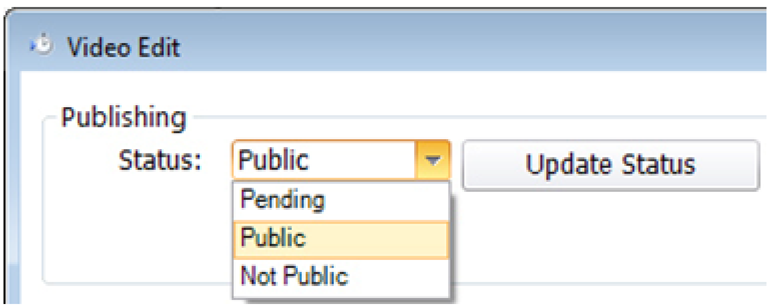
The Publishing status controls whether or not the archive is public to citizens on InSite.

1. Select *Pending*, *Public*, or *Not Public* from the **Status** dropdown menu of the Video Edit window.

Pending is the temporary status you will use for your video when you are not finished editing the content; when the video is set to *Pending* it is not available to the public.

If you select *Public*, the Video link on the InSite Calendar page will become active and the video will become available from the InSite Archive page. The time lapse from when *Public* is selected to when the video appears is ten minutes.

The *Not Public* status restricts the video from public viewing.



Setting the Publishing Status

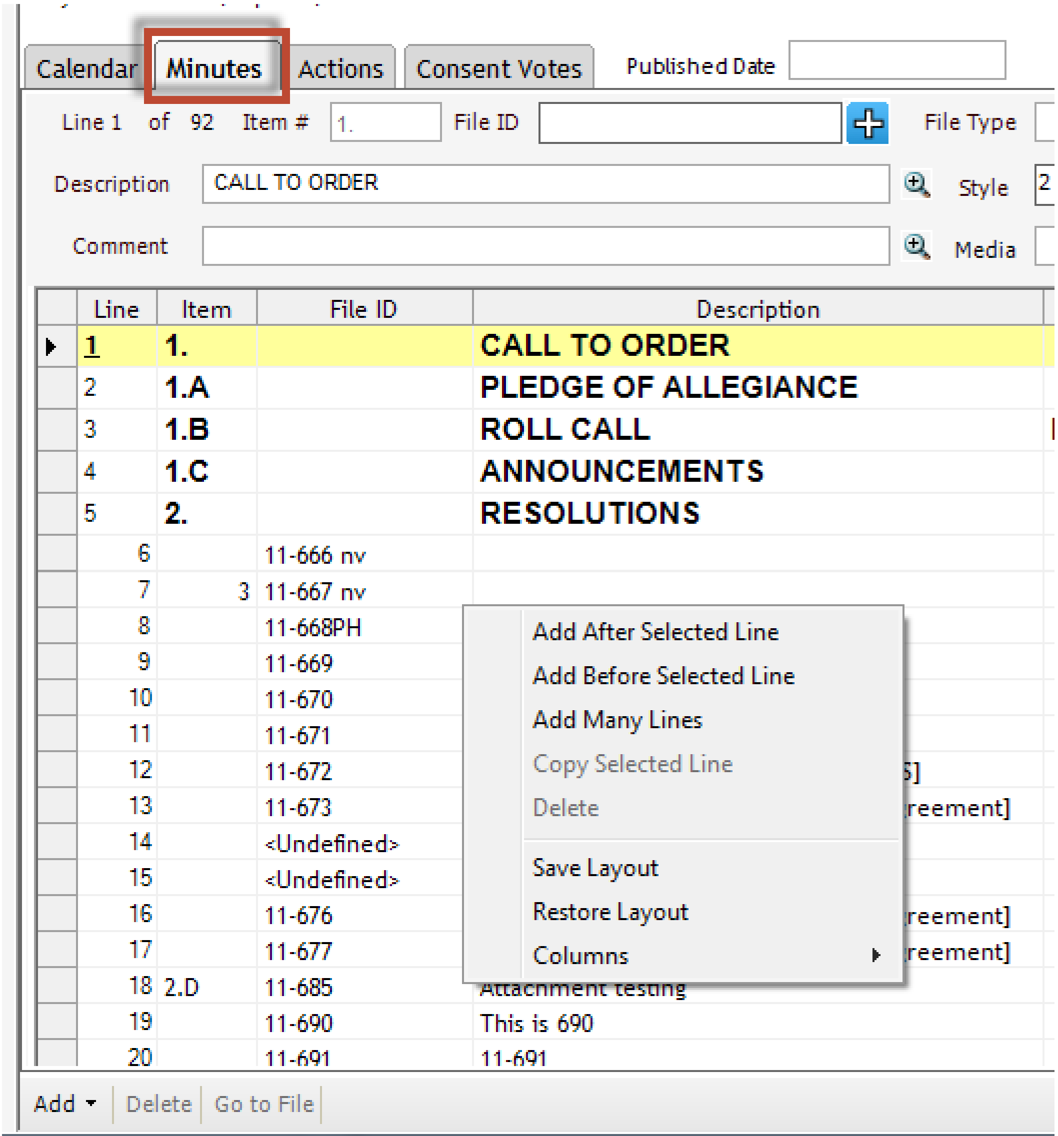
>>Next Section: Reviewing Minutes Data

Reviewing Minutes Data

Adding Minutes Lines

There are multiple ways to add new lines to the minutes document.

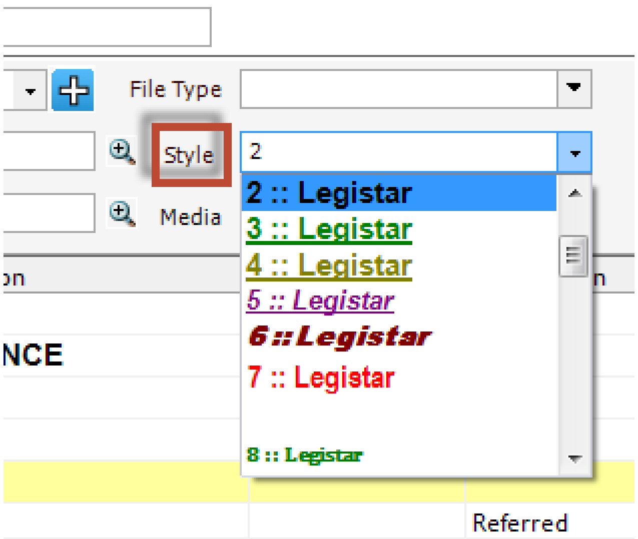
1. Right-click any **line** from the minutes tab of the minutes document. Alternatively, you can click the **Add** menu at the bottom of the screen.
2. Select one of the following:
   - Select **Add after Selected Line** to place the new line after the existing line.
   - Select **Add before Selected Line** to place the new line before the existing line.
   - Select **Add Many Lines** to enter more than one line after the existing line.
     - Hold down **Ctrl** and select **Legislative Files** from the multiple file menu.
     - Click the **larger arrow** to move the files into the minutes.



Adding Lines to the Minutes

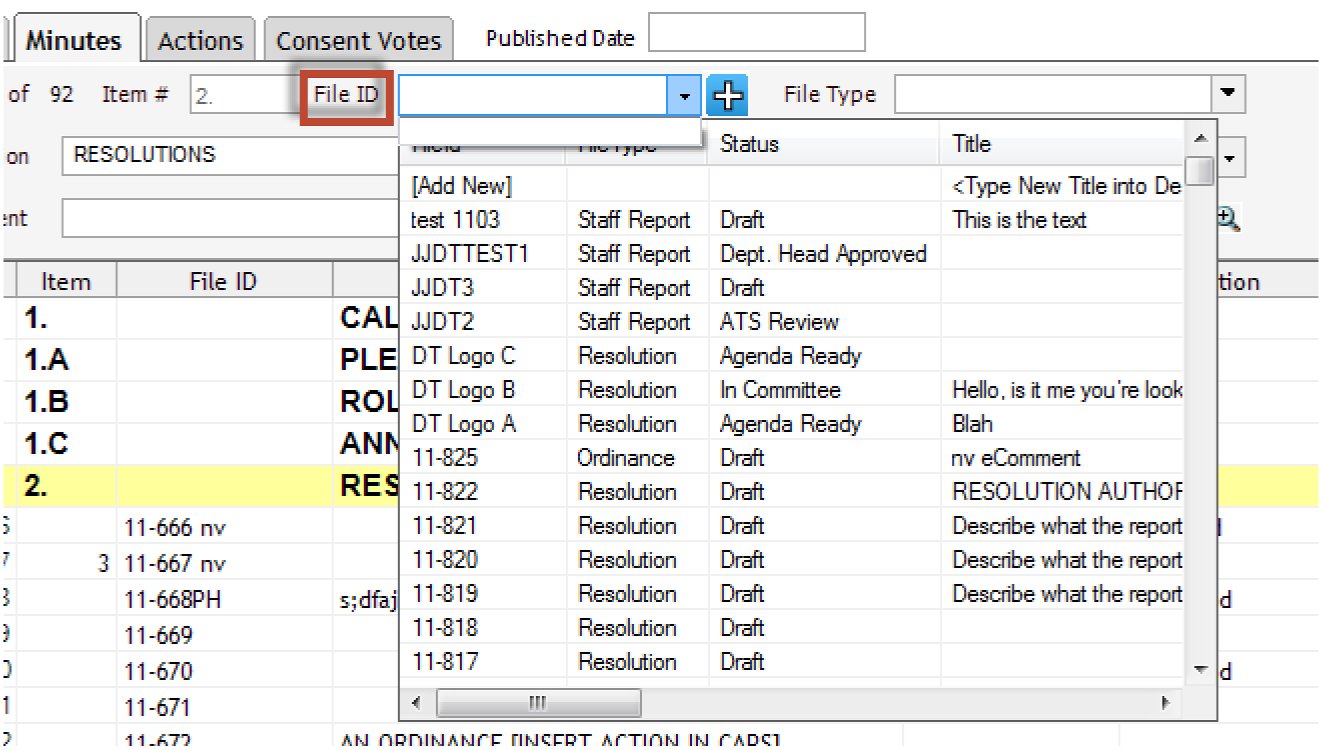
4. Select a **style** from the Style dropdown menu if the line is a header. Each style has different font attributes.

   Header List - Contains all of the headers available to add to your agenda during generation. Examples of use include adding a header for last minute legislative files and defining headers for new agendas and special meetings.



Selecting a Header Style

5. Select the File ID from the **File ID** drop-down menu if the line is a minute item.

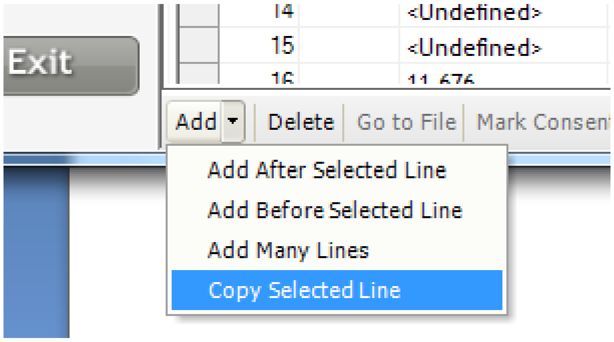


The File ID Menu

6. Click **Save**.

Copying Minutes Lines

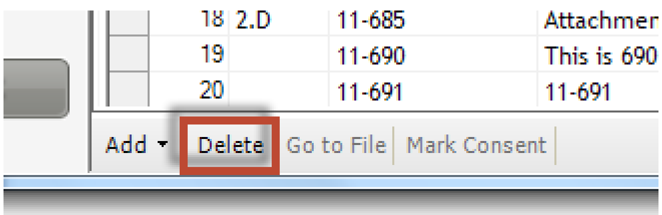
1. Select the minutes line you want to copy.
2. Click the **Add** drop-down menu **>** select **Copy Selected Line**.
3. Confirm the line is added to the agenda form below the original line.
4. Click **Save**.



Copy Selected Line

Deleting Minutes Lines

1. Select the minutes line you wish to delete.
2. Click **Delete**. You can also right-click the minutes line and select **Delete** from the context menu.



The Delete Button

3. Click **Yes** at the confirmation prompt.

>>Next Section: Working with Meeting Minutes

Working with Meeting Minutes

Minutes Reports

The Minutes report tab includes three report options which can be renamed in Administration. All reports have a criteria tab; this tab allows you to determine the variables that you want to display on the report every time you run the report.

Meeting Minutes – This report is more formal compared to the others and includes a cover page and all the details of the meeting. However, you can rename the report and determine what prints on the report within the Criteria Options section of Administration.

Action Summary- This report only prints the legislative files, headers are not included. However, you can select other variables to print in the Criteria Options section of Administration.

Meeting Referral Notice- This report produces all actions taken during the meeting, including those referred to another body.

>>Next Section: Printing the Minutes Report

Printing the Minutes Report

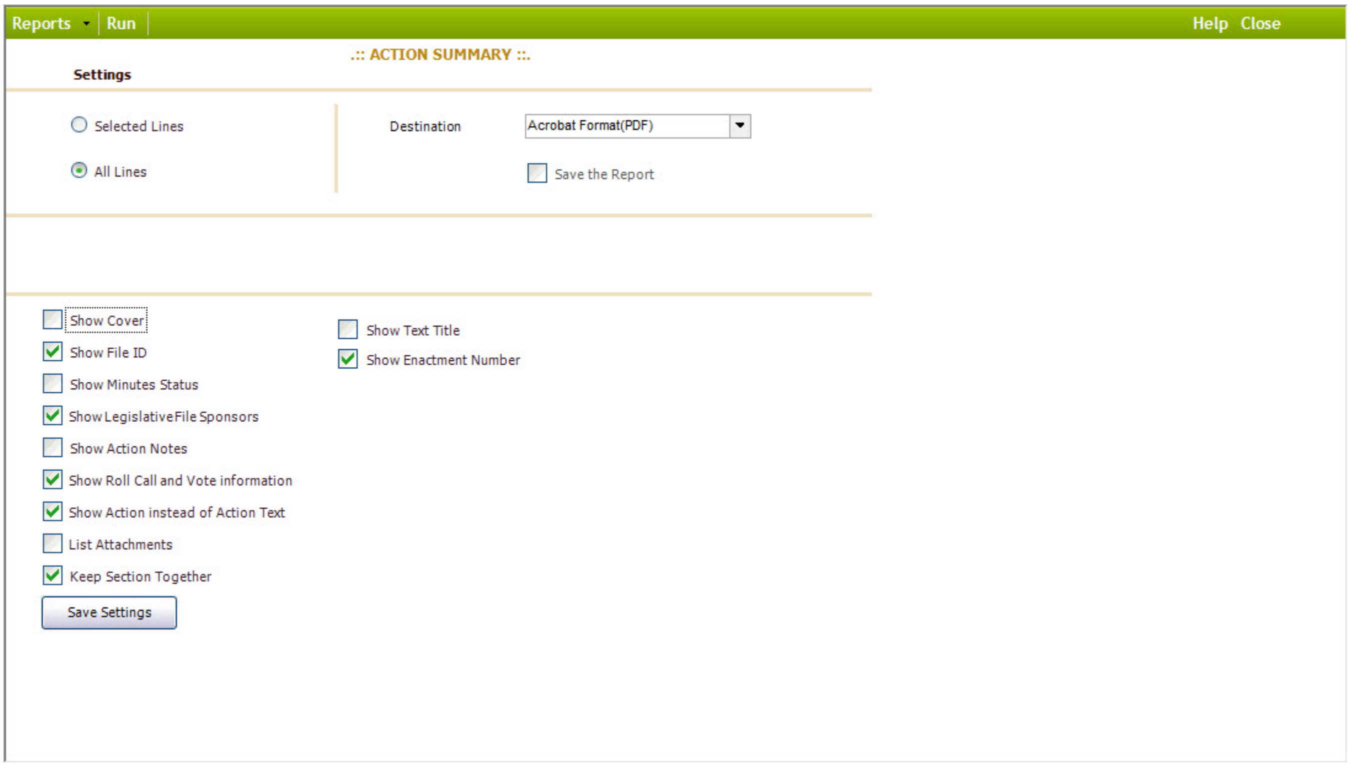
1. Click the **Reports** drop-down menu and select the **Meeting Minutes** option.
2. Select *Print* from the **Destination** menu.
3. Click **Run**.

>>Next Section: The Action Summary Report

The Action Summary Report

The Action Summary prints a concise version of the minutes. This report lists all matters discussed in the current meeting and the actions taken upon each matter.

1. Select **Reports > Action Summary**.
2. Configure the settings on the Action Summary interface. These settings are described below.



The Action Summary Interface

Item	**Description**
Show Cover	Prints the cover page
Show File ID	Prints the File ID for each agenda item on the report
Show Minutes Status	Prints the word “draft” on the minutes when in draft status. This should be unchecked when publishing the minutes
Show Legislative File Sponsors	Prints the sponsors for each agenda item on the report
Show Action Notes	Prints the notes taken on each line of the minutes

Show Roll Call and Vote information	Prints the attendance and voting data associated for each line
Show Action instead of Action Text	Displays the short action instead of the long action text
List Attachments	Prints a list of all supporting documentation for each agenda item
Keep Section Together	This keeps items from being separated onto different pages
Show Text Title	This will print the title contained in the Title box rather than the ..Title of the File text
Show Enactment Number	Prints the enactment number for legislative files that have had final actions taken and have been assigned a number

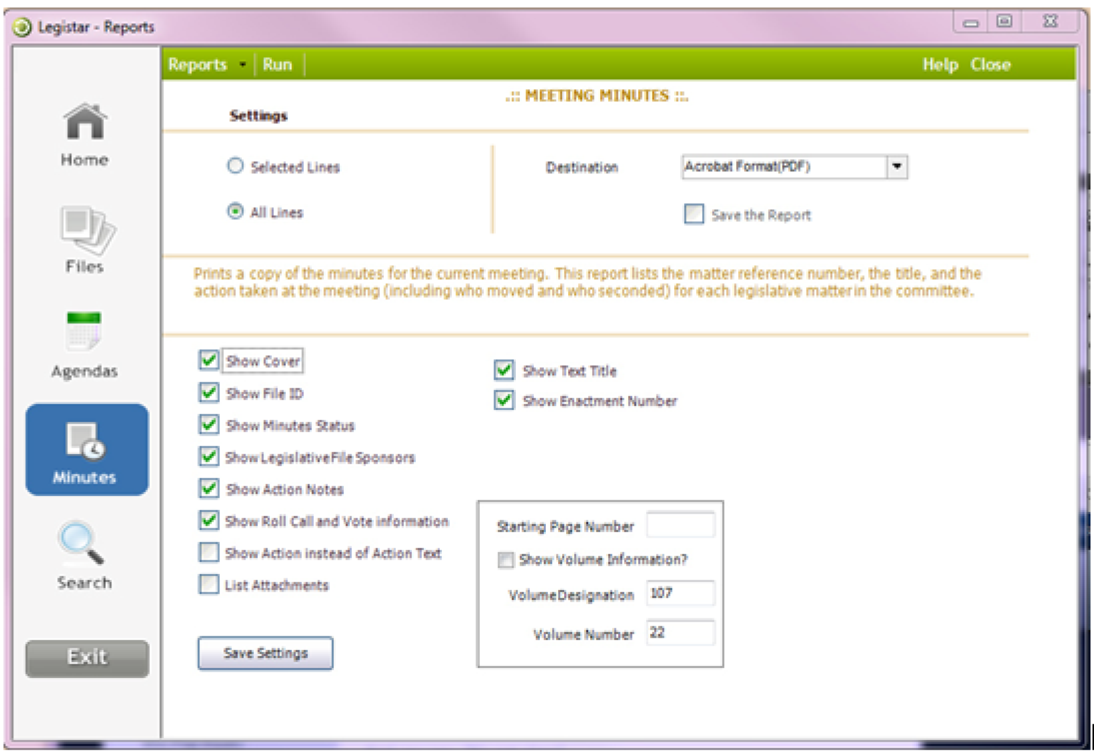
3. Select the **Print** and **Destination** options.
4. Click **Run**.

>>Next Section: The Meeting Minutes Report

The Meeting Minutes Report

The Meeting Minutes report allows you to print all the details of a meeting, including votes, notes, and attendance. The Meeting Minutes is a specially designed minutes report for the Board of Supervisors.

1. Select **Reports > Meeting Minutes**.
2. Configure the settings in the Meeting Minutes report interface. These settings are described below.



The Meeting Minutes Report

Item	Description
Show Cover	Prints the cover page
Show File ID	Prints the File ID for each agenda item on the report
Show Minutes Status	Prints the word “draft” on the minutes when in draft status. This should be unchecked when publishing the minutes

Show Legislative File Sponsors	Prints the sponsors for each agenda item on the report
Keep Section Together	This keeps items from being separated onto different pages
Show Action Notes	Prints the notes taken on each line of the minutes
Show Roll Call and Vote information	Prints the attendance and voting data associated for each line
Show Action instead of Action Text	Displays the short action instead of the long action text
List Attachments	Prints a list of all supporting documentation for each agenda item
Show Text Title	This will print the title contained in the Title box rather than the ..Title of the File text
Show Enactment Number	Prints the enactment number for legislative files that have had final actions taken and have been assigned a number
Starting Page Number	The first page after the cover page will start the page numbering with the numeric value entered here. The following pages will use subsequent numbers
Show Volume Information?	If checked the Volume Designation and Number will print on the report
Volume Designation	The location in the volume where the meeting minutes will be located
Volume Number	Which volume this meeting’s minutes will be kept in

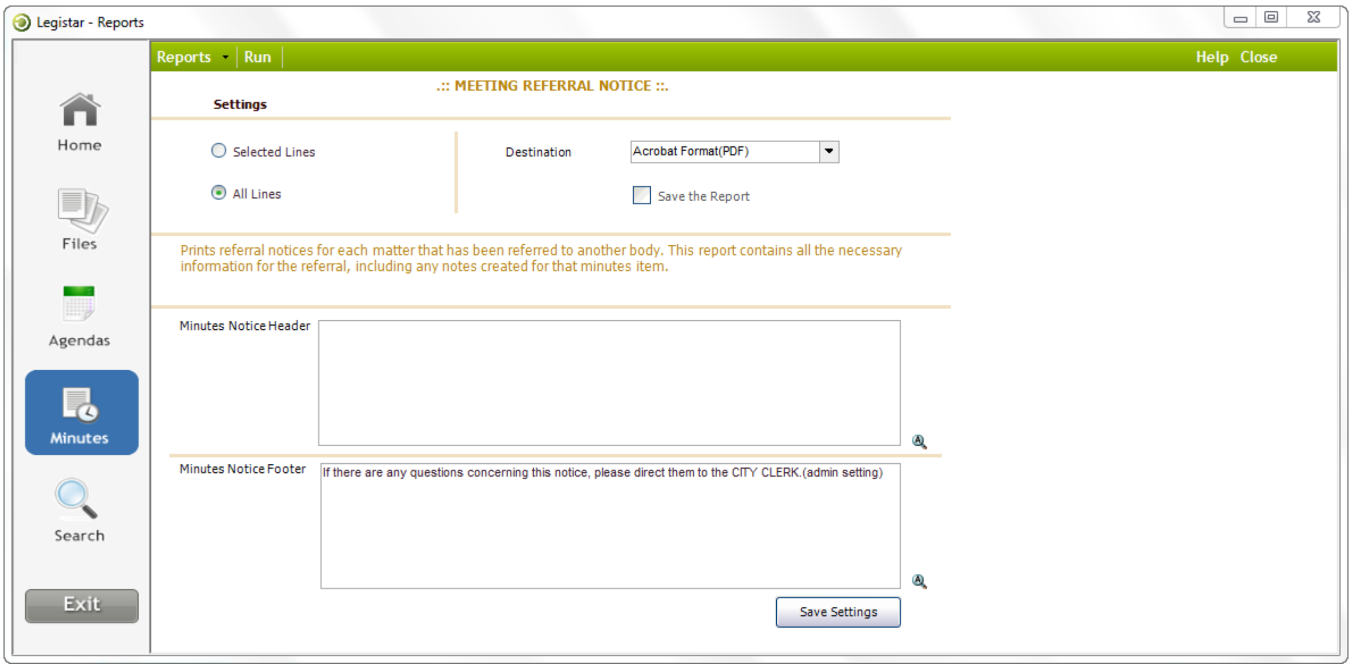
3. Select the **Print** and **Destination** options.
4. Click **Run**.

>>Next Section: The Meeting Referral Notice Report

The Meeting Referral Notice Report

The Meeting Referral Notice report prints referral notices for each matter that has been referred to another body. This report contains all the necessary information for the referral including any notes created for that minutes item.

1. Select **Reports** > **Meeting Referral**.
2. Configure the settings on the Meeting Referral interface. These settings are described below.



The Meeting Referral Notice Interface

Item	Description
Minutes Notice Header	A free text field that a user can use to add a text block to the top of the report
Minutes Notice Footer	A free text field that a user can use to add a text block to the end of a report

3. Select the **Print** and **Destination** options.
4. Click **Run**.