

Legistar

Legistar - Sign In

granicus. | Legistar
Version 5.2.125.1806

Username:
daystar

Password:

Database:
Leah Benner

Sign In

*Daystar is the Granicus global log in. Do not EVER give this log in to a client.

*Database drop down is where you choose the client's database

Home Screen

The screenshot shows the Legistar Home Screen interface. The window title is "Legistar - Home". The interface includes a navigation sidebar on the left with icons for Home, Files, Agendas, Minutes, Search, and Exit. The main content area is divided into four sections: Recent Agendas, Recent Files, Recent Minutes, and Approval Requests. The Recent Agendas and Recent Minutes sections list items from City Council meetings on 5/24/2018, 3/3/2018, and 7/19/2017. The Recent Files section lists various test files for attachment upload, training meetings, and department dropdowns. The Approval Requests section is currently empty.

Legistar - Home

Tools Reports Help

Home

granicus | Legistar

Recent Agendas

- 5/24/2018 - City Council
- 3/3/2018 - City Council
- 7/19/2017 - City Council

Recent Files

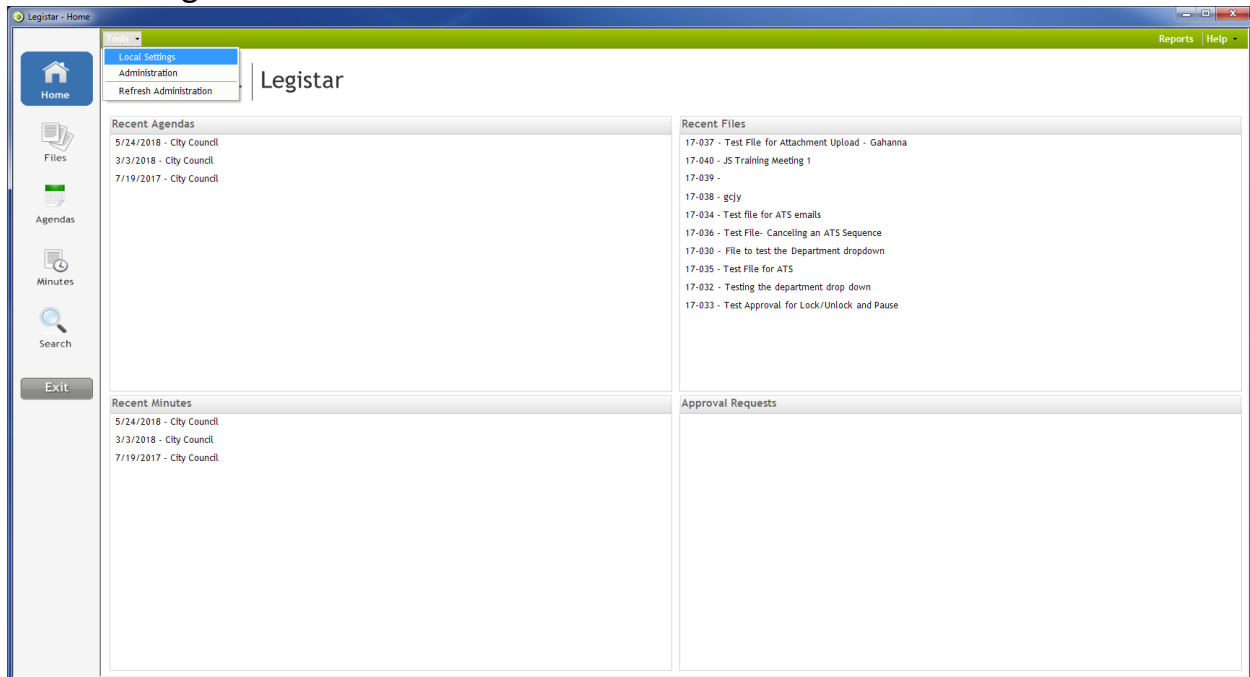
- 17-037 - Test File for Attachment Upload - Gahanna
- 17-040 - JS Training Meeting 1
- 17-039 -
- 17-038 - gcjy
- 17-034 - Test file for ATS emails
- 17-036 - Test File- Canceling an ATS Sequence
- 17-030 - File to test the Department dropdown
- 17-035 - Test File for ATS
- 17-032 - Testing the department drop down
- 17-033 - Test Approval for Lock/Unlock and Pause

Recent Minutes

- 5/24/2018 - City Council
- 3/3/2018 - City Council
- 7/19/2017 - City Council

Approval Requests

Local Settings

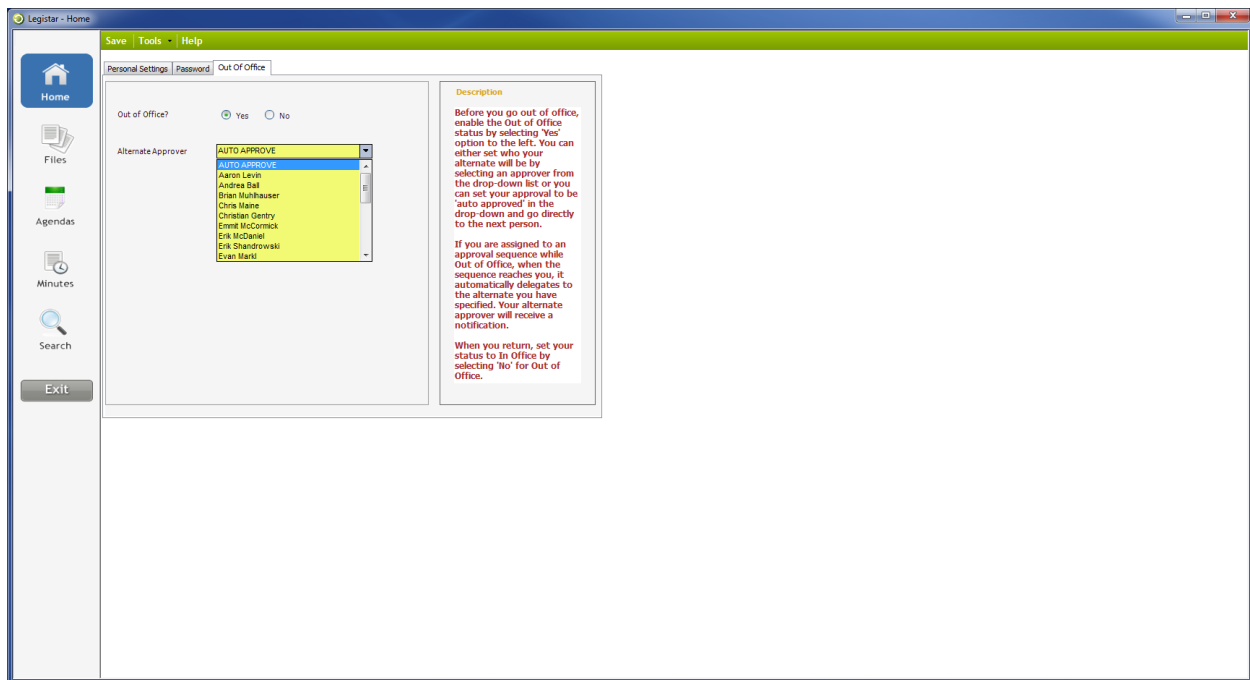


*To access Local Settings, Click the Tools drop down.

*Local Settings are specific to a user name, not a machine

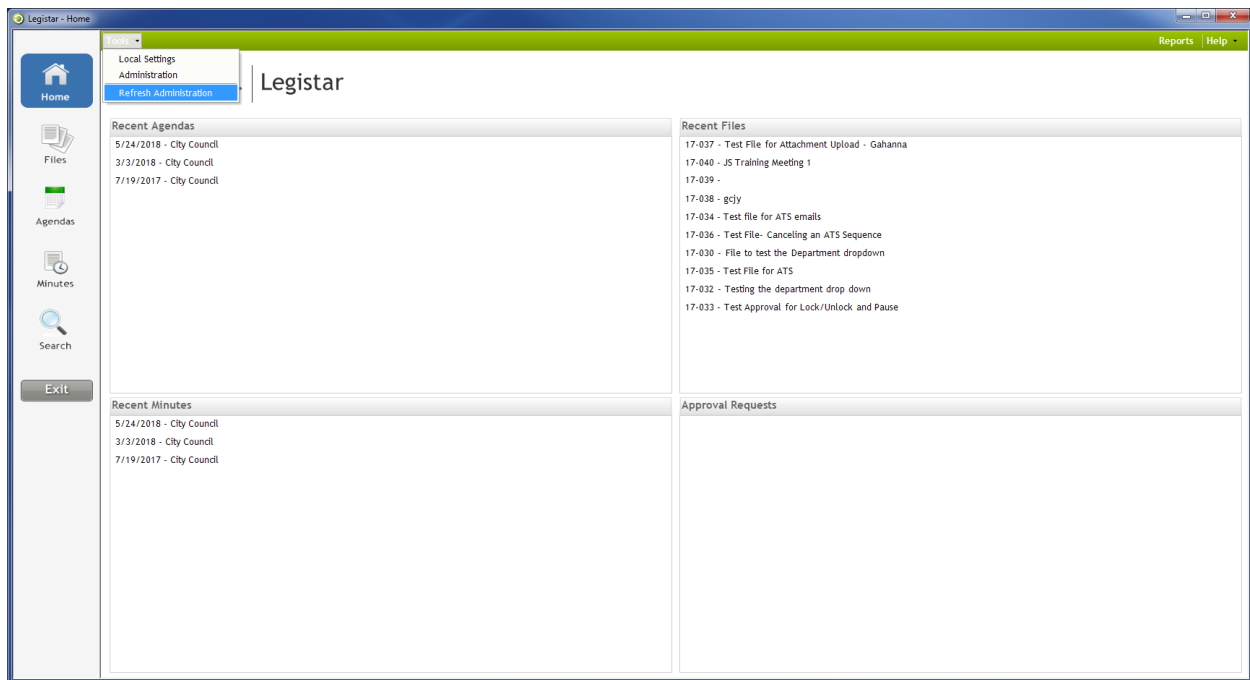
*Use Local Settings to adjust defaults, calendar views, file locations, reset password and set Out of Office

Out Of Office



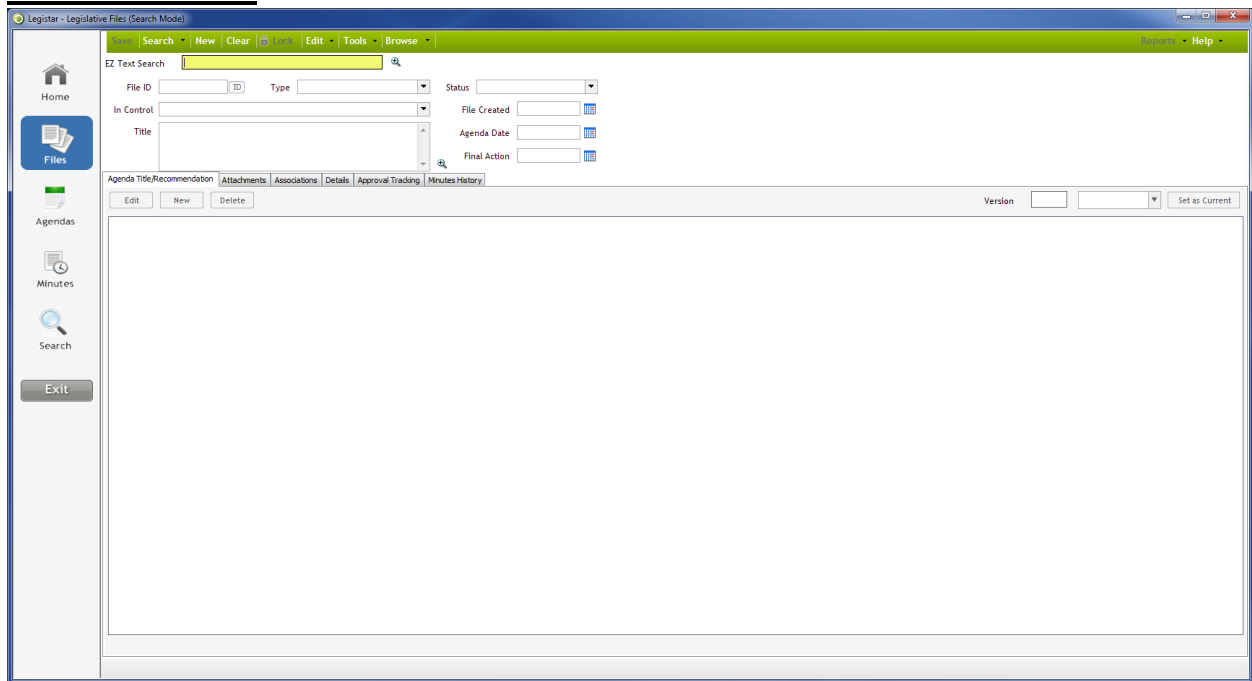
*When Out of Office is set to "Yes," the user can choose "Auto-Approve" or an alternate approver. OOO will automatically send the approval to the alternate.

Refresh Administration



*Refresh Administration is used to sync Admin with the Legistar UI. ANYTIME something is changed in Admin, all users must Refresh Admin in order to pull the changes to their Interface.

Files Module



*This is "Search Mode" in the Files Module. Any field can be used to search. In order to search the Text file, use EZ Text Search field.

Text File Tab

Legistar - Legislative Files (Read Only Mode)

Save | New | Clear | Unlock | Edit | Tools | Browse | Reports | Help

EZ Text Search

File ID: 17-033 | ID | Type: Resolution | Status: Passed

In Control: City Council | File Created: 7/26/2017

Title: Test Approval for Lock/Unlock and Pause | Agenda Date: | Final Action: 7/19/2017

Agenda Title/Recommendation | Attachments | Associations | Details | Approval Tracking (2) | Minutes History (1)

Edit | New | Delete | Version: 1 | 1 [Current] | Set as Current

Title: Test Approval for Lock/Unlock and Pause

*File ID: unique identifier for each file. Numbering schemes are set up in Admin. A scheme can be specific to a file type or can be a temporary number (TMP-XXXX).

*File Type: usually describes the content of the file

*Status: reflects what status the file is in (Draft, Approval Review, Agenda Ready, etc)

*In Control: this is the body that the file belongs to. Signifies which agenda is can be pulled in to

*Title: can be an independent field for the title. Can also pull in information from ..Title in the text file

*File Created: the date the file was created

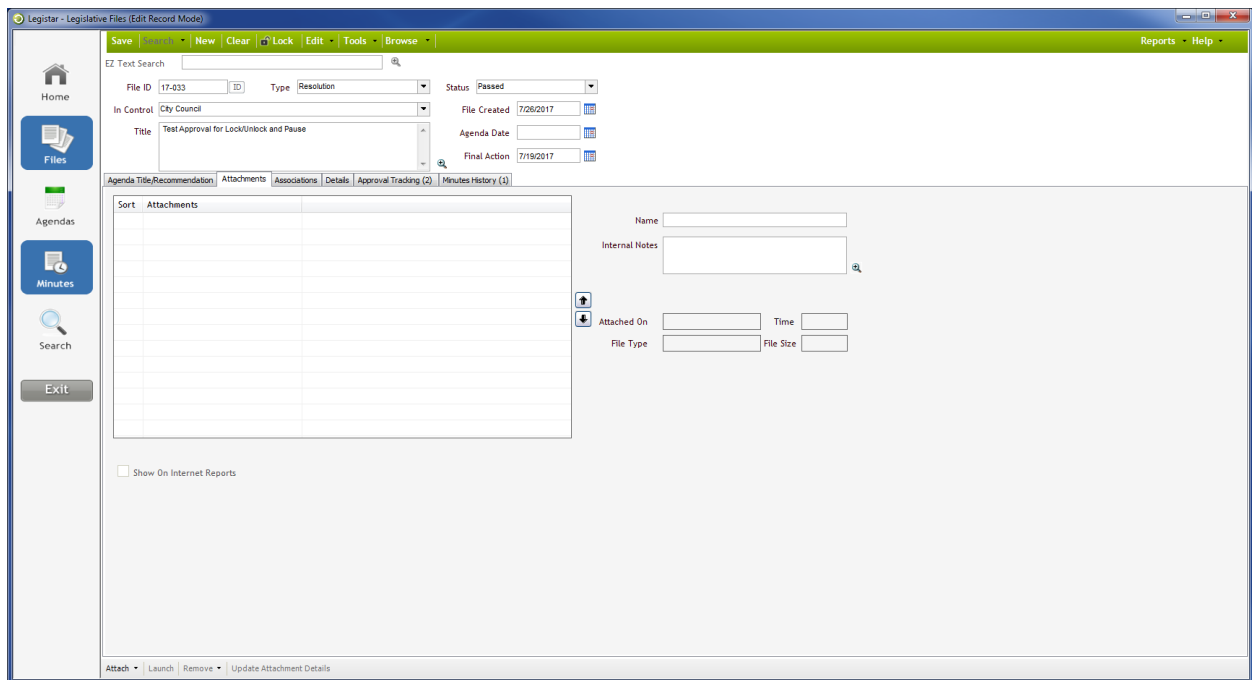
*Agenda Date: the date the file will be on an Agenda. If this field is left blank, many workflows will pull the file in to all agendas

*Final Action: this field completes the file. It tells Legistar that it no longer needs to be considered for workflows

*Agenda Title/Recommendation tab: this is the text file. The text file can open in a Word editor or in a text editor (per client setting). Client can set up templates for users. To access a template in the Word editor, use the Add Ins tab. The text file supports limited formatting. It does not support tables or images. The RTF data limit is 64kb. There is no way around this limit. The only way to see how much data is in the text file is to look in the DB.

*Version: Each version can have a different text file and approval sequence. To see a difference version, click "Set as Current." Only the current version will be generated on an agenda.

Attachments tab



*Attachments tab: users can attach hyperlinks or files. Each attachment must be 100mb or less

Associations tab

The screenshot displays the 'Legistar - Legislative Files (Edit Record Mode)' application. The interface includes a top menu bar with options like 'Save', 'New', 'Clear', 'Lock', 'Edit', 'Tools', and 'Browse'. Below the menu is a search bar labeled 'EZ Text Search'. The main content area is divided into several sections: 'File ID' (17-033), 'Type' (Resolution), 'Status' (Passed), 'In Control' (City Council), 'File Created' (7/26/2017), 'Title' (Test Approval for Lock/Unlock and Pause), 'Agenda Date', and 'Final Action' (7/19/2017). A navigation bar below the main content area includes tabs for 'Agenda Title/Recommendation', 'Attachments', 'Associations', 'Details', 'Approval Tracking (2)', and 'Minutes History (1)'. The 'Associations' tab is currently active, showing four empty boxes for 'Code Sections (0) Edit', 'Indexes (0) Edit', 'Sponsors (0) Edit', and 'Related Files (0) Edit'. A sidebar on the left contains navigation icons for 'Home', 'Files', 'Agendas', 'Minutes', 'Search', and 'Exit'.

*Code Sections: this list is usually edited by Admins. Its used in instances where a file is related to an existing law/code

*Indexes: this is a way to group files by content

*Sponsors: Sponsors are set up in Admin and are usually office members

*Related Files: an easy way to link files together. Provides hyperlinks on Insite

Details tab

The screenshot shows the 'Legistar - Legislative Files (Edit Record Mode)' window. The interface includes a top menu bar with 'Save', 'New', 'Clear', 'Lock', 'Edit', 'Tools', and 'Browse'. Below the menu is a search bar labeled 'EZ Text Search'. The main content area is divided into several sections: 'File ID' (17-033), 'Type' (Resolution), 'Status' (Passed), 'In Control' (City Council), 'File Created' (7/26/2017), 'Title' (Test Approval for Lock/Unlock and Pause), 'Agenda Date', and 'Final Action' (7/19/2017). A navigation bar below the title includes 'Agenda Title/Recommendation', 'Attachments', 'Associations', 'Details', 'Approval Tracking (2)', and 'Minutes History (4)'. The 'Details' tab is active, showing fields for 'Department', 'Agenda Section', 'Entered by', 'Internal Notes', 'Agenda Number', 'Effective Date', and a 'Confidential' checkbox. A 'Last Edit' timestamp is displayed at the bottom: 'Thursday, August 24, 2017 at 09:25 AM (Daystar)'. A sidebar on the left contains icons for 'Home', 'Files', 'Agendas', 'Minutes', and 'Search', along with an 'Exit' button.

*Details tab: usually the details tab contains content that is internal to the client

*Department drop down: can be renamed to Requester. This field plays an important role in some workflows.

*Entered By: this is the drafter of the file. Usually auto-populated with the user's email

*Internal Notes:

*Agenda Number: this field is auto-updated when the agenda is updated

*Agenda Section: this field is used by workflow. It tells Legistar where the file needs to pull in on an agenda. Not in use by all clients

*Not Viewable Via Insite: this box is (usually) checked when a file is created. The box can be unchecked manually by a user. It is auto-unchecked if a file is on an agenda when the agenda is set to final. If this box is checked, a file will not be hyperlinked on an agenda. Once the box is unchecked, it will never automatically re-check without a human

*Effective Date: this is usually considered the "Enactment Date"

*Confidential box: when this box is checked, only users with permission to see confidential files will be able to see the file. For others, it will be non-existent.

MISSING FROM THIS SCREENSHOT

*Enactment Number: this number is set up in Admin and can be auto-applied to files when certain actions are applied

Approval Tracking tab

The screenshot displays the 'Approval Tracking' tab in a software application. The interface includes a top menu bar with options like 'Save', 'New', 'Clear', 'Lock', 'Edit', 'Tools', and 'Browse'. Below the menu is a search bar and a form for file details, including File ID (17-033), Type (Resolution), Status (Passed), In Control (City Council), File Created (7/26/2017), Title (Test Approval for Lock/Unlock and Pause), Agenda Date, and Final Action (7/19/2017). The main area features a table with the following data:

Seq #	Approver Name	Due Days	Action Type	Email Template	Status	Due Date	Action	Action Date	Escalation Date	Notes
01	Christian Gentry	2	Approver	Individual Review Request	Approved	7/28/2017	Approve	7/26/2017 7:42 AM		No
02	Christian Gentry	2	Approver	Individual Review Request	Disapproved	7/28/2017	Disapprove	7/26/2017 7:46 AM		Yes

On the right side, there is a 'Manage Approver' panel with fields for Approver Name (Christian Gentry), Action Type (Approver), Email Template (Individual Review Request), and Due Days (2). The bottom of the window shows a status bar with options like 'Add Sequence', 'Save As', 'Start', 'Cancel', 'Escalate', '1 of 2', 'New', 'Delete', and 'Pending'.

- *Requester: usually the user who sets up/starts the sequence. This user may have special permissions while the sequence is active.
- *Approver Name: when this name is green, they are considered the active approver. Once an approver has become active, the only way to remove them is to cancel the sequence
- *Due Days: how many days the approver has until the file escalates
- *Action Type: can be Approver or FYI
- *Email Template: which email is sent to the approver when their line becomes active. Usually "Individual Review Request" or "FYI"
- *Status: Blank-not started, Review Requested-active approver, Notified – FYI, Approved, Disapproved, Delegated
- *Due Date: the date the approver must take action by. If the date has passed, the file will escalate
- *Action: what action the approver took
- *Action Date: when the approver took action
- *Escalation Date: when the file escalated. Blank if the file did not escalate
- *Notes: yes or no
- *-Add Sequence- drop down: the list of preset sequences available to the user
- *Save As: saves a new preset sequence
- *Start/Pause: start will be available if the sequence is not started. Pause will be available if the sequence is active. Pause will stop the emails
- *Cancel: will completely remove all evidence of the sequence.
- *Escalate: will escalate the file (if set up in Admin)
- *New: add a new line to the existing sequence
- *Delete: delete a line (cannot delete active or passed approvals)
- *-Pending- drop down: a list of the user's pending requests (this has nothing to do with this file at all)
- *Manager Approver tab: (right panel) this is for adding/altering approvers in the sequence. Only available when the sequence is inactive (not started)

*Approver Action tab: (right panel) this is where the approvers take action. They can enter notes, approve, disapprove, or delegate

*Search tab: (right panel) this tab is used in Search Mode only

Minutes History tab

The screenshot shows the 'Legistar - Legislative Files (Edit Record Mode)' application. The interface includes a top menu bar with 'Save', 'New', 'Clear', 'Unlock', 'Edit', 'Tools', and 'Browse'. Below the menu is a search bar and a form for file details. The main area is divided into a table for 'Minutes History' and a right-hand panel for 'Action Taken' details.

File Details:

- File ID: 17-033
- Type: Resolution
- Status: Approval Review
- In Control: City Council
- File Created: 7/26/2017
- Title: Test Approval for Lock/Unlock and Pause
- Agenda Date: [Calendar Icon]
- Final Action: 7/19/2017

Minutes History Table:

Date	Acting Body	Action Taken
7/19/2017	City Council	approved

Action Taken Details:

- Version: 1
- Action Date: 7/19/2017
- Time: 01:00 PM
- Acting Body: City Council
- Action Taken: approved
- Sent To: [Dropdown]
- Due Date: [Calendar Icon]
- Return: [Calendar Icon]
- Action Note: [Text Area]
- Motion Text: A motion was made by Council Member Wei
- Result: Pass Fail None

- *Minutes History tab: this tab shows every meeting that the file is on and what action was taken. Some clients manually add history lines (this means that they are not linked to a meeting)
- *Delete: (bottom) only available for manually added history lines
- *Agenda: (bottom) takes you to the agenda for the highlighted history line. If only agenda is highlighted/clickable, then the file only lives on the agenda. If agenda is not highlighted/clickable, then the file is not on the agenda
- *Minutes: (bottom) takes you to the minutes for the highlighted history line. If only minutes is highlighted/clickable, then the file only lives on the minutes. If minutes is not highlighted/clickable, then the file is not on the minutes
- *Votes: (bottom) takes you to the actions tab on the minutes to view the votes (if available)
- *History Criteria drop down: (bottom) ALWAYS select "Show All" when looking at minutes history

Agenda Module

Date	Day and Time	Meeting Body	Status	Comments
May 2018 (2)				
5/24/2018	Thu - 1:00 PM	City Council	Draft	
5/3/2018	Thu - 1:00 PM	City Council	Draft	

*Agenda Module: All fields are searchable in search mode

*To see more calendar dates, click "Clear" then "Search." This will show all agendas.

*Meeting of the: this field selects which meeting body to create an agenda for. Once the agenda has been generated, this field cannot be modified

*Location: can be auto-filled from Admin, but always editable

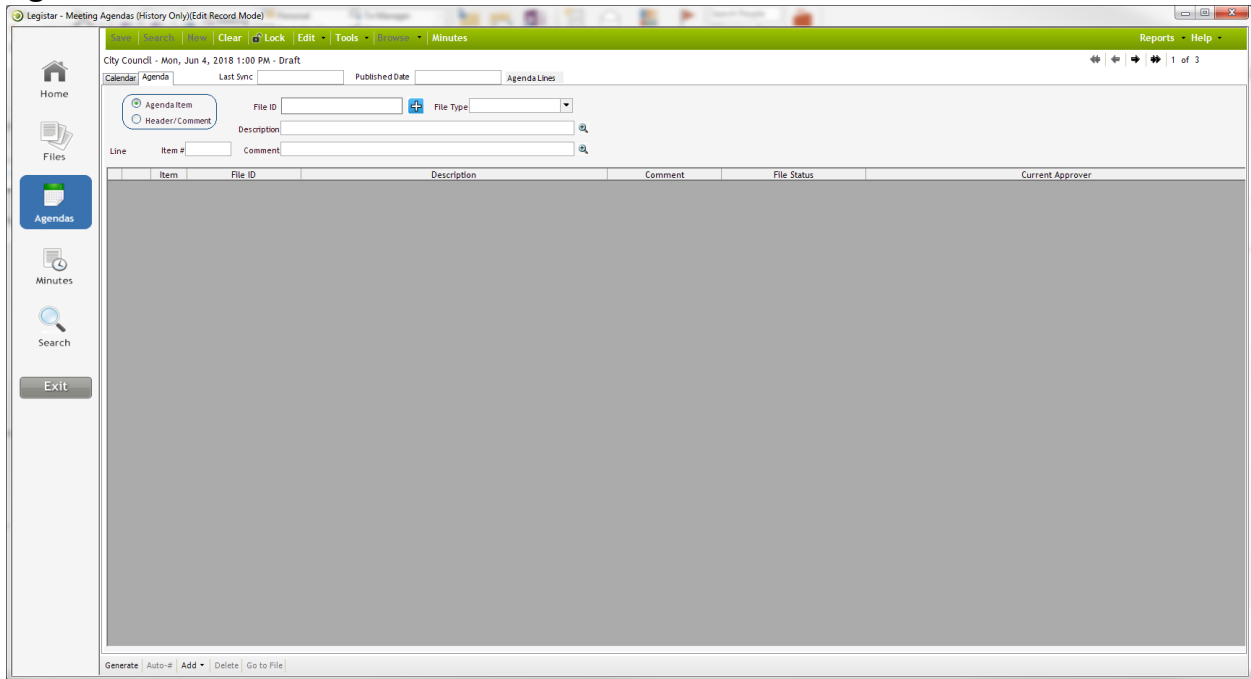
*Notes: (this field cannot be exported to iLeg)

*Date/Time: to change date/time after the initial choice, use the Tools dropdown and select "Change Meeting Date and Time"

*Status: when the agenda is set to final, all files will be "viewable on the web." User must set agenda to Final in order to publish

Never run a report from the Calendar tab. Always open the Agenda tab.

Agenda



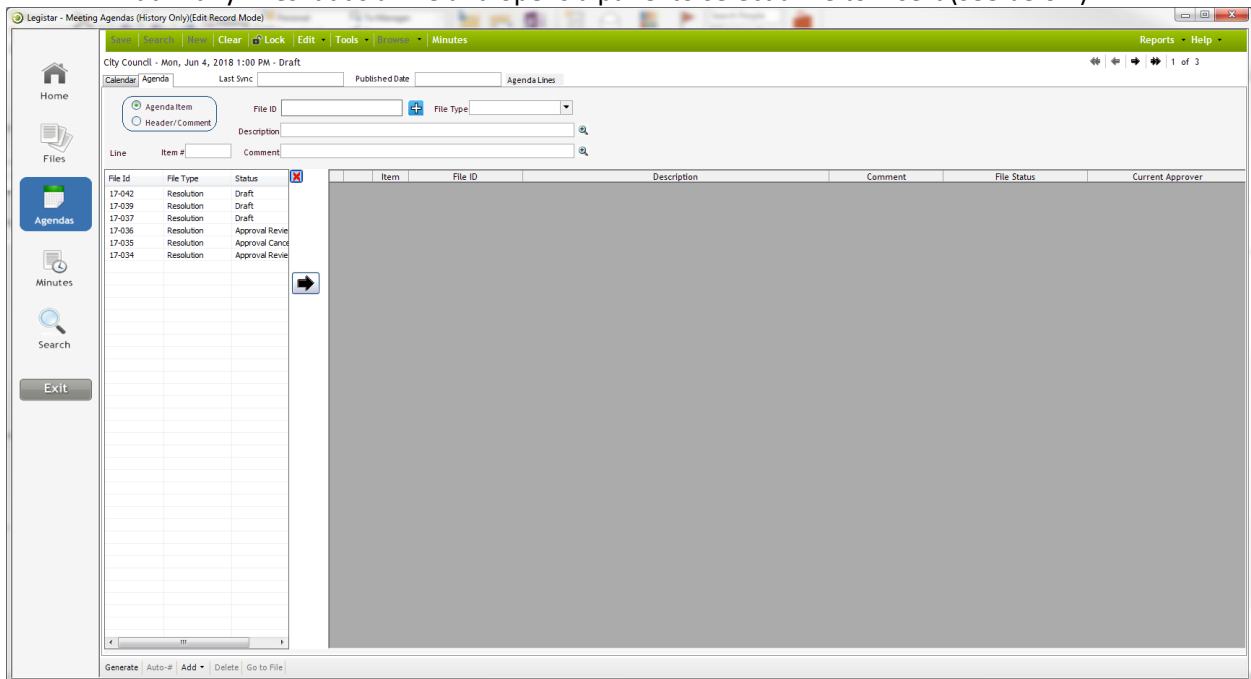
*Generate: (bottom) creates the agenda based on the workflow

*Add drop down:

*Add after selected line: add a line after the selected line (from there you choose header/file)

*Add before selected line: add a line before the selected line (from there you choose header/file)

*Add many lines: adds a line and opens a panel to select a file to insert (see below)



Header fields

Line	Item	File ID	Description	Comment	File Status	Current Approver
1			Call to Order			
2			Roll Call			
3			Proclamations			
4			Approval of Minutes			
5			Consent Agenda			
6			Ordinances on Second Reading			
7			Ordinances on First Reading			
8			New Business			
9	17-040		J5 Training Meeting 1		Passed	
10			Old Business			
11			Public Hearing			
12			Citizen Comments			
13			Adjournment			

- *Header List drop down: headers that have been set up in Admin (user does not have to select one)
- *Style: set up in Admin. Dictates font, size, margin of header
- *Description: the actual header text
- *Item #: outline numbers (can be set up in Admin)
- *Comment: header subtext

Agenda Item Fields

City Council - Thu, May 24, 2018 1:00 PM - Draft

Calendar | Agenda | Last Sync: | Published Date: | Agenda Lines

Agenda Item | File ID: 17-040 | File Type: Resolution | Ver: 1

Description: JS Training Meeting 1

Line	Item #	File ID	Description	Comment	File Status	Current Approver
1			Call to Order			
2			Roll Call			
3			Proclamations			
4			Approval of Minutes			
5			Consent Agenda			
6			Ordinances on Second Reading			
7			Ordinances on First Reading			
8			New Business			
9		17-040	JS Training Meeting 1		Passed	
10			Old Business			
11			Public Hearing			
12			Citizen Comments			
13			Adjournment			

Generate | Auto-# | Add | Delete | Go to File

*File ID: this is where you can change which file shows on this line. It is a little buggy. Once you type/select the file ID, click into the File Type field.

*File Type: the file type selected for the file

*Description: this field usually pulls in the title or ..title of the file

*Item #: can be set up in Admin

*Comment: sub-text for the file

Export

The screenshot shows the Legistar Meeting Agendas application in 'Read Only Mode'. The window title is 'Legistar - Meeting Agendas (Read Only Mode)'. The main menu includes 'Home', 'Files', 'Agendas', 'Minutes', 'Search', and 'Exit'. The 'Agendas' menu is open, showing a list of items with columns for 'Line', 'Item', 'File ID', 'Comment', 'File Status', and 'Current Approver'. A context menu is open over the first item, listing various actions such as 'Unlock', 'Lock All Legislative Files', 'Export Data', and 'Attach File To Selected Records'. The 'Export Data' option is highlighted in blue.

Line	Item	File ID	Comment	File Status	Current Approver
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					

*Export: must be completed prior to publishing. Exporting sends the data to Media Manager.

Running a Report

The screenshot shows two windows from the Legistar application. The top window, titled 'Legistar - Meeting Agendas (Read Only Mode)', displays a table of agenda items for a City Council meeting on Monday, June 4, 2018. The table has columns for Line, Item, File ID, Description, Comment, File Status, and Current Approver. The items listed are:

Line	Item	File ID	Description	Comment	File Status	Current Approver
1			Call to Order			
2			Roll Call			
3			Proclamations			
4			Approval of Minutes			
5			Consent Agenda			
6			Ordinances on Second Reading			
7			Ordinances on First Reading			
8			New Business			
9			Old Business			
10			Public Hearing			
11			Citizen Comments			
12			Adjournment			

The bottom window, titled 'Legistar - Reports', shows the 'Agenda Packet' report settings. The 'Settings' section includes:

- Selected Lines:** Radio buttons for 'Selected Lines' and 'All Lines' (selected).
- Destination:** A dropdown menu set to 'Acrobat Format(PDF)'. Other options include 'Publish to Insite - Calendar'.
- Include Attachments:** A checkbox that is currently unchecked.
- Save the Report:** A checkbox that is currently unchecked.

Below these settings, there is a list of checkboxes for report content:

- Show Cover:
- Show File ID:
- Show Agenda Status:
- Show Legislative File Sponsors:
- List Attachments:
- Show Agenda Notes:
- Show Legislative File History:
- Show Legislative File History Notes:
- Keep Section Together:

Buttons for 'Sections', 'Save Settings', and 'Save the Report' are also visible.

*Once you choose your report, you have multiple options. Typically, we don't change the check box settings unless troubleshooting one of them specifically.

*Agenda Packet: this exports a packet to your local machine. With this method, each PDF will be created individually and the user will need Adobe Pro in order to combine them

*PUBLISHING: set the destination drop down to "Publish to Insite – Calendar" and click run. Publishing will make a PDF available on the client's Insite page as well as make the agenda available in iLegislate. Please note that the agenda will not be available in iLegislate unless the export happened FIRST.

*Destination drop down: when set to PDF, it will create a PDF copy local on the machine. When set to Agenda Packet (if set up), it will create a fully combined packet

Minutes Module

Line	Item #	File ID	Description	Action	Action Text	Action Note	Media
1			Call to Order				
2			Roll Call				
3			Proclamations				
4			Approval of Minutes				
5		17-039	Test File for Minutes				
6			Consent Agenda				
7		17-036	Test File- Cancelling an ATS Sequence				
8		17-035	Test File for ATS				
9		17-034	Test File for ATS emails				
10			Ordinances on Second Reading				
11			Ordinances on First Reading				
12			New Business				
13		17-042	Test Title for Title Box				
14			Old Business				
15		17-037	Test File for Attachment Upload - Gahanna				
16			Public Hearing				
17			Citizen Comments				
18			Adjournment				

- *Minutes: if the client uses Live Manager, then they will most likely import their minutes (Tools drop down). Importing the minutes will overwrite any data that is currently in the minutes. NEVER re-import the minutes without approval from the client
- *Add drop down: (bottom) same add options as the agenda
- *Delete: (bottom) delete line from minutes. User can highlight multiple lines to delete at once
- *Standard Action: (bottom) see Consent Agenda tab
- *Go To File: (bottom) opens the file
- *Mark Consent: (bottom) marks file for Consent. Files # 17-036, 17-035 and 17-034 have been marked consent, which is why their line numbers are **RED**

Actions tab

City Council - Mon, Jun 4, 2018 1:00 PM - Draft

Calendar | Minutes | **Actions** | Consent Votes

Item # [] File Id [] Ver []

Description: Roll Call | Style: 1

Mover: [] | Second: [] | Failed for lack of second: []

Action: []

Sent To: [] | Due Date: []

Note: [] | Index: []

Line	Item	File ID	Description	Action
1			Call to Order	
2			Roll Call	
3			Proclamations	
4			Approval of Minutes	
5	17-039		Test File for Minutes	
6			Consent Agenda	
7	17-036		Test File - Canceling an ATS Sequence	
8	17-035		Test File for ATS	
9	17-034		Test file for ATS emails	
10			Ordinances on Second Reading	
11			Ordinances on First Reading	
12			New Business	
13	17-042		Test Title for Title Box	
14			Old Business	
15	17-037		Test File for Attachment Upload - Gahanna	
16			Public Hearing	
17			Citizen Comments	
18			Adjournment	

Motion Text: []

Rec Votes: No Vote Voice Vote Roll Call Vote

Attendance: [] | Add Member

Name	Attendance
Leah Benner	Present
Robben Weems	Present
Wesley Martin	Present
Kelli Webber	Present
Patrick Hidalgo	Present

Attendances | Delete | Delete All

*Actions tab: this is where users take roll call, add notes and take votes

*Attendance tab: (right panel square) Once attendance has been taken, the line number will show in [BLUE](#)

*Attendance button: can only be clicked once, which is why it is grayed out. It will pull in all current office members for this body. Attendance values can be set up in Admin, so many clients have different options. It is populated in a specific order (sort order) and can only be changed in Admin

*Ad-Hoc Add Member: this will add a person to attendance (Patrick Hidalgo). The person will be shown in italics. To be available in this drop down, the person must have an office member record for any body. Regular attendance must be taken prior to adding someone using Ad-Hoc

*Delete: deletes a person from roll call

*Delete All: deletes the entire roll call

Rec Votes tab (right panel box)

The screenshot shows the Legistar Meeting Minutes software interface. The main window is titled "Legistar - Meeting Minutes (History Only)/Edit Record Mode". The top menu bar includes "Save", "Print", "Clear", "Lock", "Edit", "Tools", "Agendas", "Reports", and "Help". The current session is "City Council - Mon, Jun 4, 2018 1:00 PM - Draft".

The interface is divided into several sections:

- Left Panel:** Contains navigation icons for Home, Files, Agendas, Minutes (highlighted), Search, and Exit.
- Top Panel:** Includes a toolbar with "Save", "Print", "Clear", "Lock", "Edit", "Tools", and "Agendas".
- Main Content Area:**
 - Item # [] File ID [17-039] Ver [1]
 - Description: Test File for Minutes Style [0]
 - Mover: Benner, Leah; Secondar: Webber, Kelli
 - Action: approved
 - Sent To: []; Due Date: []
 - Note: [] Index: []
 - Table:**

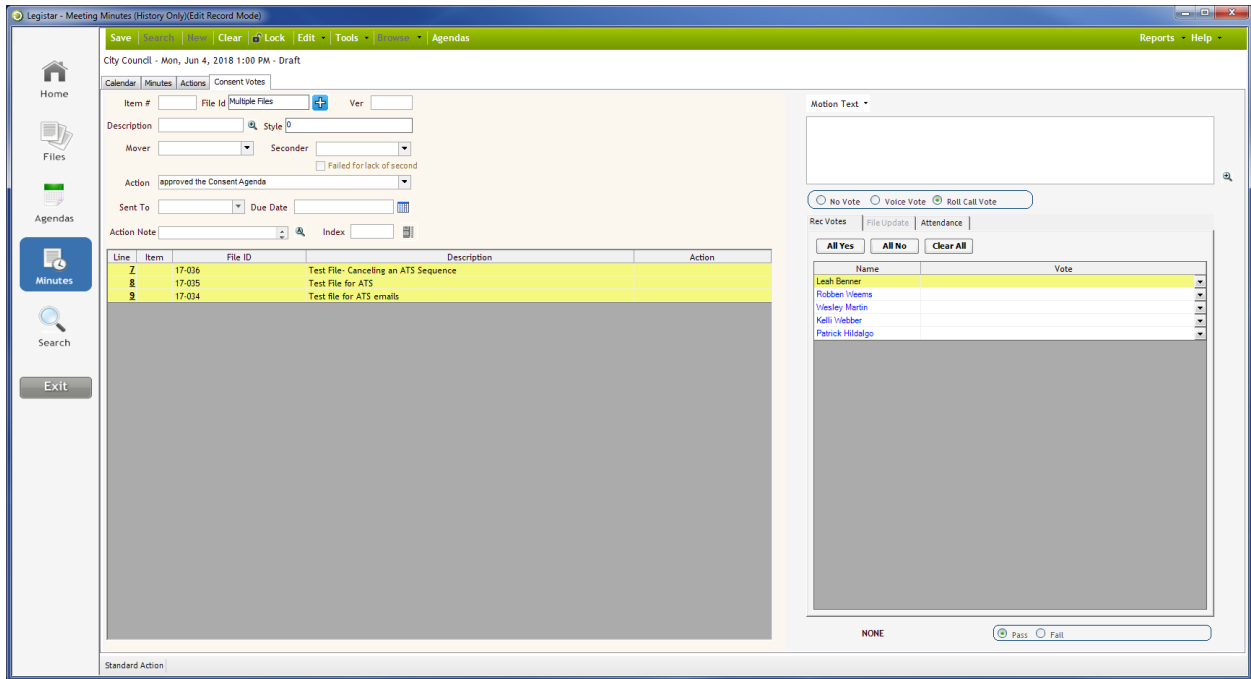
Line	Item	File ID	Description	Action
1			Call to Order	
2			Roll Call	
3			Proclamations	
4			Approval of Minutes	
5		17-039	Test File for Minutes	approved
6			Consent Agenda	
7		17-036	Test File - Cancelling an ATS Sequence	
8		17-035	Test File for ATS	
9		17-034	Test file for ATS emails	
10			Ordinances on Second Reading	
11			Ordinances on First Reading	
12			New Business	
13		17-042	Test Title for Title Box	
14			Old Business	
15		17-037	Test File for Attachment Upload - Gahanna	
16			Public Hearing	
17			Citizen Comments	
18			Adjournment	
- Right Panel (Rec Votes tab):**
 - Motion Text: A motion was made by Chairperson Benner, seconded by Council Member Webber, that this Resolution be approved. The motion carried by the following vote.
 - Vote Type: No Vote Voice Vote Roll Call Vote
 - Rec Votes:
 - Table:

Name	Vote
Leah Benner	Aye
Robben Inemo	Aye
Wesley Martin	Aye
Kelli Webber	Aye
Patrick Hildalgo	Aye
 - Tally: 5:0 Pass Fail

*Rec Votes tab: (right panel box)

- *Mover: select a mover in the drop down. Populated by attendance (only present members)
- *Secondar: select a secondar in the drop down. Populated by attendance (only present members)
- *Action: select an action in the drop down. The actions list is populated by file type in Admin
- *Select vote type radio button: Voice Vote usually does not show individual members. Roll Call Vote lists each person's vote
- *Fill in Votes: All Yes, All No, or use the drop down per member. Vote values can be set up in Admin, so many clients have different options.
- *Motion Text: this is set up in Admin. Can be manually altered

Consent Vote tab



*Consent Vote tab: a consent vote is a block vote (one vote for many items)

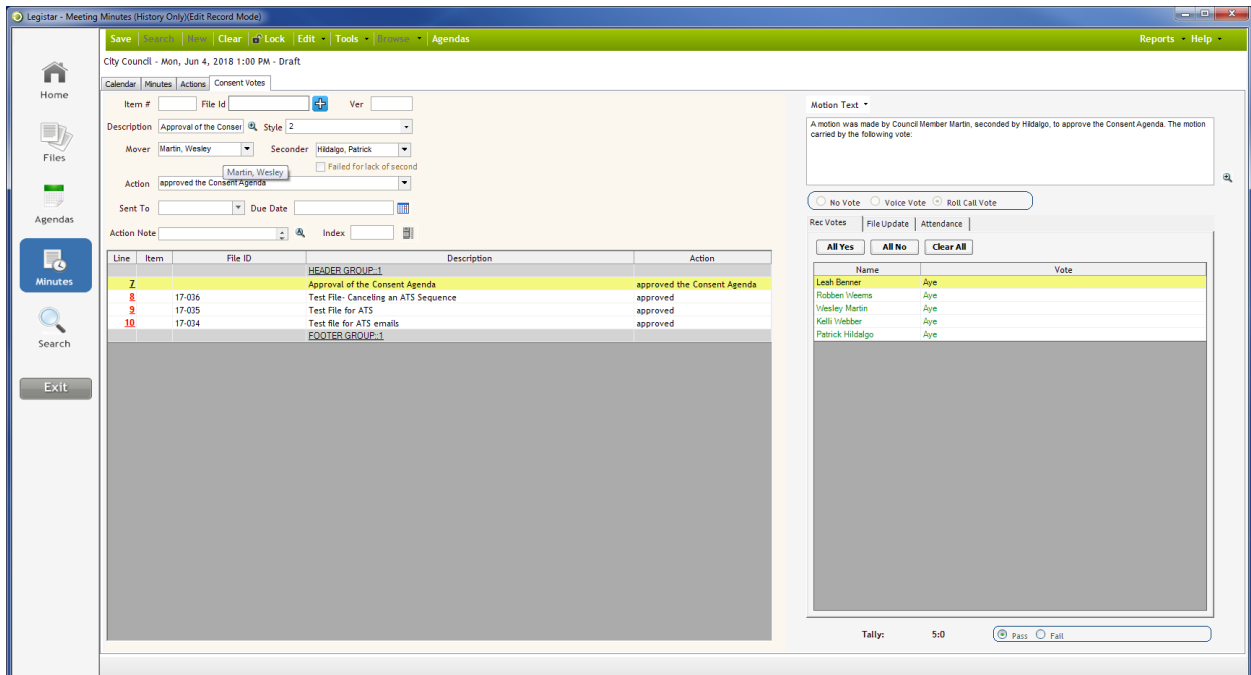
*Highlight all files that are in the vote

*Select Mover, Seconded

*Select Vote Type

*CONSENT VOTES ARE ALWAYS ALL YES. IF IT IS NOT ALL YES-IT IS NOT CONSENT

*Standard Action: applies the standard action to each file. See below for a complete Consent Vote



Running a Report

The screenshot displays the 'Legistar - Reports' configuration window. The window title is 'Legistar - Reports' and it includes a 'Run' button and a 'Help Close' link. The main area is titled 'Settings' and contains the following options:

- Selected Lines:** Radio button (unselected)
- All Lines:** Radio button (selected)
- Destination:** A dropdown menu is open, showing options: Acrobat Format(PDF), Publish To InSite - Calendar (PDF), Internet HTML File, Word Document, Acrobat Format(PDF), Printer, E-mail, and RTP (Editable - Word).
- Show Cover:** Unchecked checkbox
- Show File ID:** Checked checkbox
- Show Minutes Status:** Unchecked checkbox
- Show Legislative File Sponsors:** Checked checkbox
- Show Action Notes:** Checked checkbox
- Show Roll Call and Vote Information:** Checked checkbox
- Show Action Instead of Action Text:** Unchecked checkbox
- List Attachments:** Unchecked checkbox
- Keep Section Together:** Checked checkbox
- Show _Title:** Checked checkbox
- Show Enactment Number:** Unchecked checkbox

Additional controls include a 'Save Settings' button and a 'Sections' button. A note states: 'Click on the Sections button to select the File Sections to be displayed in the report.'

*Report destinations are the same as the agenda destinations

Administration

Site Information

The screenshot shows the 'Legistar - Site Information' window. On the left is a navigation tree with 'Site Information' selected. The main area has a green header with 'New', 'Tools', 'Save', 'Delete', 'Report', and 'Help' buttons. Below the header, there are two text input fields: '* GovernmentName' containing 'Little Town' and 'Address' containing '909 Main Street' and 'Little Town, CO 80000'. Below these are two logo upload sections. The 'Cover Page Logo (180x180)' section shows a preview of the 'Little Town' logo and 'Import' and 'Delete' buttons. The 'Report Header Logo (180x180)' section also shows a preview of the logo and 'Import' and 'Delete' buttons. To the right of the logo sections, there is a vertical line and a text box containing instructions: 'The large logos should be 500x500 pixels.', 'The small logos should be 300x300 pixels.', and 'PNG and JPG files work best.'

*The Site Address often pulls in to reports.

*Logos also pull in to certain reports

Government Bodies (Main Tab)

Legistar - Government Bodies

Government Bodies

- Bodies
 - Primary Legislative Body
 - Committee
 - Boards or Commission
 - Department
- People
- Legislative Files
- Work Flow Control
- Report Design
- Votes and Attendance Settings
- System Security
- Label Settings
- Approval Tracking
- Security Log
- Exit

Main | MediaManager Export Settings

Primary Legislative Body

* Body Type Name: Primary Legislative Body | Ad Hoc Title: []

Mover/Seconder: Mover And Seconder, Mover Only, No Mover Or Seconder

Can Control File | Show On Web

Sort	Body Types	Mover/Second	Control File	Office/People	Ad Hoc Title	Abbre
1	Primary Legislative Body	Both	Yes	Yes		
2	Committee	Both	Yes	Yes		
3	Boards or Commission	Both	Yes	Yes		
4	Department	None	No	No		

1 Of 4

*This is where the body types are stored

*Mover/Seconder settings

*Visible on web

*Can Control File: meaning the bodies under the body type will show in the "In Control" drop down on a file

Government Bodies (MediaManager Export Tab)

The screenshot shows the 'Legistar - Government Bodies' application window. The left-hand navigation pane is expanded to 'Government Bodies', with 'Committee' selected. The main content area is titled 'MediaManager Export Settings' and contains several configuration fields:

- * Duration (Minutes): 60
- * Camera: CUSTOMERCARE03ENC
- * Player Template: Default Player
- * Archive Folder: Training
- * Archive Status: Pending

Below the settings is a table with the following data:

Sort	Body Types	Mover/Second	Control File	Office/People	Ad Hoc Title	Abbre
1	Primary Legislative Body	Both	Yes	Yes		
2	Committee	Both	Yes	Yes		
3	Boards or Commission	Both	Yes	Yes		
4	Department	None	No	No		

The 'Committee' row is highlighted in yellow. The bottom right corner of the window shows '2 Of 4'.

*Settings for where the meeting goes in Media Manager

Government Bodies-Bodies (Main Tab)

Sort Order	Body Name	Body Type	Contact
2	Audit Committee	Committee	
8	Aviation Department	Department	
9	Building & Equipment Services	Department	
1	City Council	Primary Legislative Body	
3	Clerk's Office	Department	
7	Department of Human Services	Department	
12	Disability Access Advisory Board	Boards or Commission	
12	Downtown Operations Department	Department	
5	Finance Department	Department	
6	Library	Department	
11	Municipal Courts	Department	
10	Office of Innovation	Department	
13	Parks & Recreation	Boards or Commission	
14	Planning & Zoning Board	Boards or Commission	
4	Public Arts Committee	Committee	

*List of all bodies in database

*Body Name:

*Body Type: workflows are based off body type, so this is important

*Body Abbreviation:

*Contact:

*Body Meets: allows the body to show in the "Meeting of the" drop down in the Agenda Module

*Can Be Requester: this puts the body name in the requester/department drop down on the Details tab in a file

*Active: removing the active checkbox will remove the entire body from Insite

*Auto-Export:

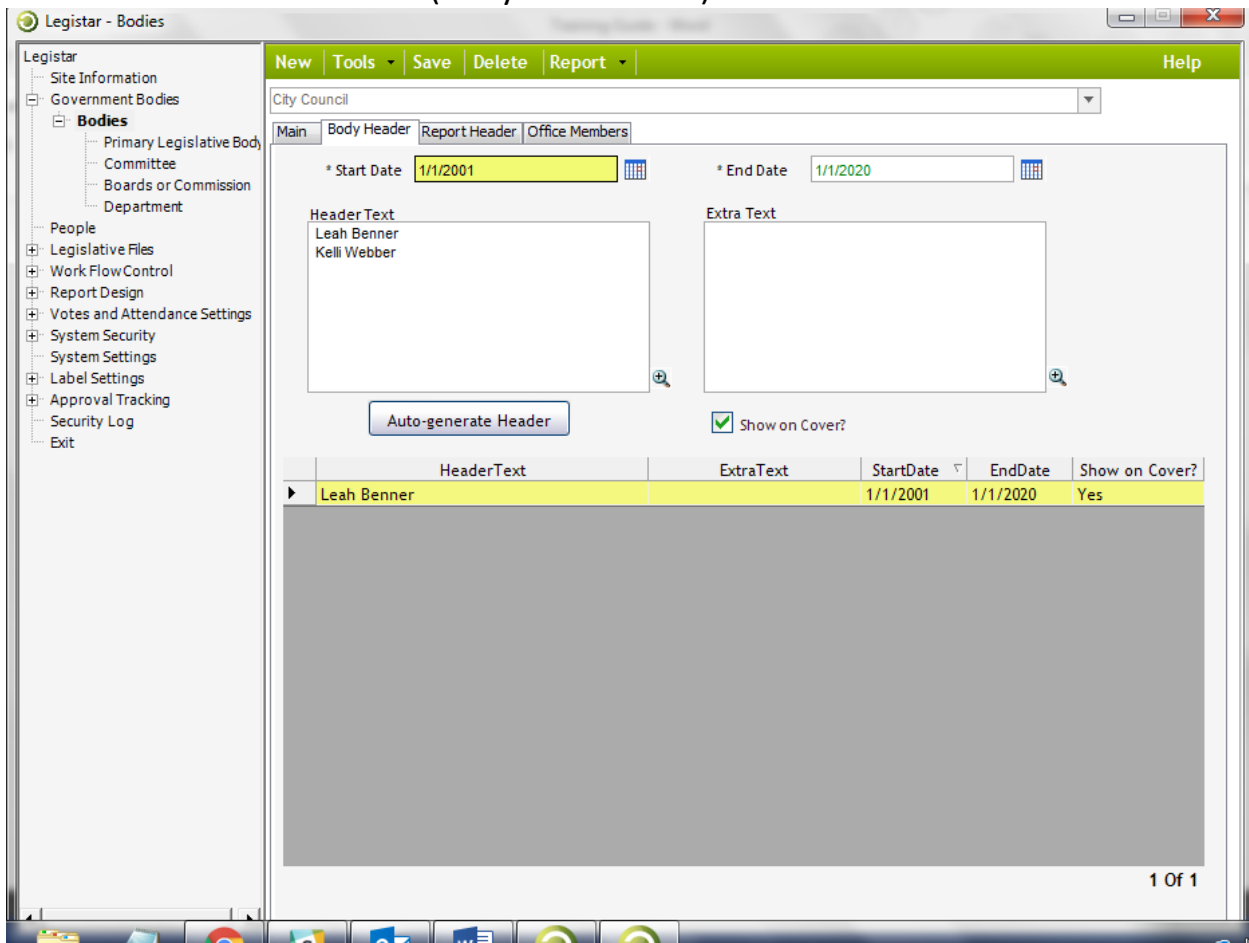
*Body Location: this field auto-populates on the Calendar tab of the agenda

*Body Description:

*Meeting Time: this time auto-populates when an agenda is created

*Sponsor Type: Members Only (shows members in the sponsor field), Body Only (shows the body in the sponsor field), Members and Body (shows both members and the body in the sponsor field), None (shows no options in the sponsor field)

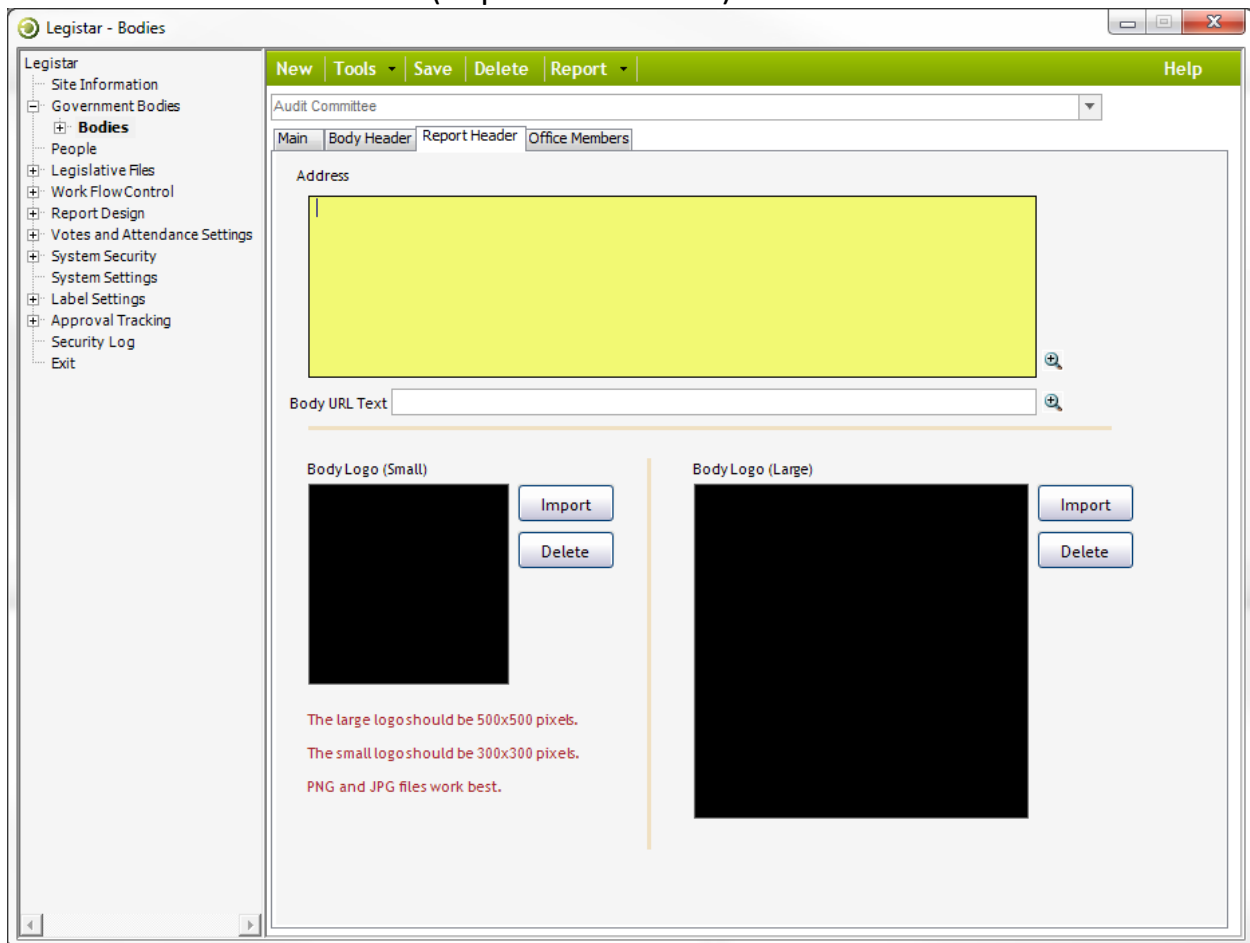
Government Bodies-Bodies (Body Header Tab)



*Body headers pull in to reports

*Start and End dates must not overlap with other body headers (each body can have multiple body headers)

Government Bodies-Bodies (Report Header tab)



*Information on this tab can be pulled in to reports

Government Bodies-Bodies (Office Member tab)

The screenshot shows the 'Legistar - Bodies' application window. The left sidebar contains a navigation tree with 'Government Bodies' expanded to 'Bodies'. The main window has a menu bar with 'New', 'Tools', 'Save', 'Delete', 'Report', and 'Help'. Below the menu is a dropdown for 'Audit Committee' and tabs for 'Main', 'Body Header', 'Report Header', and 'Office Members'. The 'Office Members' tab is active, showing a form with the following fields:

- * Member: Peter Chay (highlighted)
- * Body: Audit Committee
- Office Title: Council Member
- Appointed By: (empty)
- * Start Date: 1/1/2017
- * End Date: 12/31/2018
- * Member Type: Member
- Term-Out Date: (empty)
- Sort Order: 1
- * Vote Weight: 1.00
- Extra Text: (empty)

Below the form is a table with columns: Sort Order, Member, Last Name, Body, and Office Title. The table contains three rows:

Sort Order	Member	Last Name	Body	Office Title
1	Peter Chay	Chay	Audit Committee	Council Mem
2	Emmit McCormick	McCormick	Audit Committee	Chairperson
3	Lucy Shaw	Shaw	Audit Committee	Council Mem

At the bottom right of the table area, there are two small icons for sorting (up and down arrows) and a page indicator '1 Of 3'.

- *Show Members Only For Selected Date: this field helps when figuring out attendance issues. Remove the checkbox to see all members. Change date to reflect date of meeting.
- *Member: this field pulls from people records
- *Office Title: may show on reports
- *Start Date: in order to be available for a meeting, the member must start AT LEAST the day before a meeting
- *Member Type: important for reports (titles/names can show differently for different member types)
- *Sort Order: the order in which members are generated in minutes (attendance and votes)
- *Vote Weight: this is a Legistar only feature. Does not reflect in Live Manager.
- *Appointed By:
- *End Date: must be the day AFTER the last meeting.
- *Term-Out Date: field is used if the member goes passed their term out date (used in combination with Term Extended checkbox)
- *Extra Text:
- *Can Sign checkbox: allows the member to be set up for signature reports
- *Term Extended checkbox: as long as this box is checked, the member will ALWAYS show in attendance and votes
- *Show On Web: shows member on Insite (if set up)

People (Main Tab)

Display Name	Title	Last Name	First Name	Organization	Department
Andrea Ball	Ms.	Ball	Andrea		Aviation Dep.
Leah Benner	Ms.	Benner	Leah		City Council
Peter Chay	Mr.	Chay	Peter		Audit Commi
Jeremy Crow	Mr.	Crow	Jeremy		Finance Depa
Sydney Erickson		Erickson	Sydney		City Council
Christian Gentry	Mr.	Gentry	Christian		Public Arts C
Patrick Hildalgo	Mr.	Hildalgo	Patrick		Downtown O
Travis Kozik	Mr.	Kozik	Travis		Public Arts C
Aaron Levin	Mr.	Levin	Aaron		Department
Chris Maine	Mr.	Maine	Chris		Downtown O
Evan Markl	Mr.	Markl	Evan		Disability Acc
Wesley Martin	Mr.	Martin	Wesley		City Council
Emmit McCormick	Mr.	McCormick	Emmit		Audit Commi
Erik McDaniel	Mr.	McDaniel	Erik		Department
Rob Meyers	Mr.	Meyers	Rob		Building & Ec
Brian Muhlhauser	Mr.	Muhlhauser	Brian		Building & Ec

*People: this is meant to reflect all people related to the government process. Includes staff and office members

*Display Name: for report purposes

*Title: this field can pull in to reports. Can't be the same as office title

*First Name/Last Name: this is important to match to iLegislate voters

***Organization:**

*Email Preference: used for ATS

*Alternate Approver: used for ATS escalations

*Notes:

*Department: this field is used for Approval Master Sequences. User will only be able to see preset sequences owned by their department. If it is left blank in the people record, the user will be able to see all preset sequences

*Active:

*Can be requester: adds the person to the requester/department drop down on the Details tab of a file

*Approver: allows the person to be added as an approver

(Address, Photo & Signature, Social Media tabs)

*You can enter more information into the People record – Most of which can be made visible on Insite

Legislative Files

Sort Order	Type Name	Auto Key	EN Key	Add Status	Abbreviat
1	Appointment	General ID		Draft	
2	Ordinance	General ID		Draft	
3	Minutes	General ID		Draft	
4	Proclamation	General ID		Draft	
5	Report	General ID		Draft	
6	Resolution	General ID		Draft	

*This is where new file types are added

*Type Name: shows in the file type drop down

*Auto Key: which numbering schema will be applied to the file when the file type is selected

*EN Key: which enactment key will be used (not required)

*Add Status: what the status will be when a new file with this type is created

*Abbreviation:

*Active: will allow the file type to be used. If inactive, the type will show in Search Mode, but not in Edit Record Mode

*Available on the Web: will allow the file type to be visible on the Web

Legistar - Auto Numbering

Legistar - Auto Numbering

New Tools Save Delete Report Help

* Key Name

Prefix

Next Number

Suffix

Preview

Key Name	Prefix	Next Number	Suffix
General ID	17-	043	
Ord EN Number	ORD 17-	001	
Res EN Number	RES 17-	001	
Temporary ID	TMP-	0002	

1 Of 4

*This is where auto numbering for files is set up. Clients usually need to update these auto-numbers in the beginning of the year.

*Key Name: for Admin purposes

*Prefix: static

*Next Number: this is the auto-incrementing part of a file ID

*Suffix: static

Legistar - File Status

* File Status: Available on the Web

Description: Active

	Sort	File Status	Description	ExtraSort	Available on t
▶	1	Agenda Ready	Items ready for the agenda	2147483648	Yes
	2	Approval Cancelled	approval sequence cancelled	2147483648	No
	3	Approval Paused	approval sequence paused	2147483648	No
	4	Approval Review	Items in pre-introduction Approval	2147483648	No
	5	Consent Agenda	Status for Items on Consent Agenda	2147483648	Yes
	6	Draft	Used for Initial File Creation	2147483648	No
	7	Failed	Matter files Denied Passage	2147483648	Yes
	8	Filed	Status of items that were received :	2147483648	Yes
	9	First Reading	Status of Ordinances in First Reading;	2147483648	Yes
	11	Held	Items postponed by committee or c	2147483648	Yes
	12	New Business	Item is ready to be placed on the C	2147483648	Yes
	13	Passed	Status of items that have been pass	2147483648	Yes
	14	Public Hearing	Status of Items having a Public Hear	2147483648	Yes
	15	Referred	Status for Items in Committee	2147483648	Yes
	16	Reported to Council	Moves matters onto Council agenda	2147483648	Yes
	17	Second Reading	Status of Ordinances for their Secor	2147483648	Yes
	18	Tabled	Tabled items	2147483648	Yes
	20	Withdrawn	Items that are awaiting Mayoral sign	2147483648	Yes

1 Of 18

*This is where file statuses are created. Statuses are part of a client's workflow

Legistar - Text Sections

Legistar - Text Sections

New Tools Save Delete Report Help

* Section Name: Body * Section Value: ..body

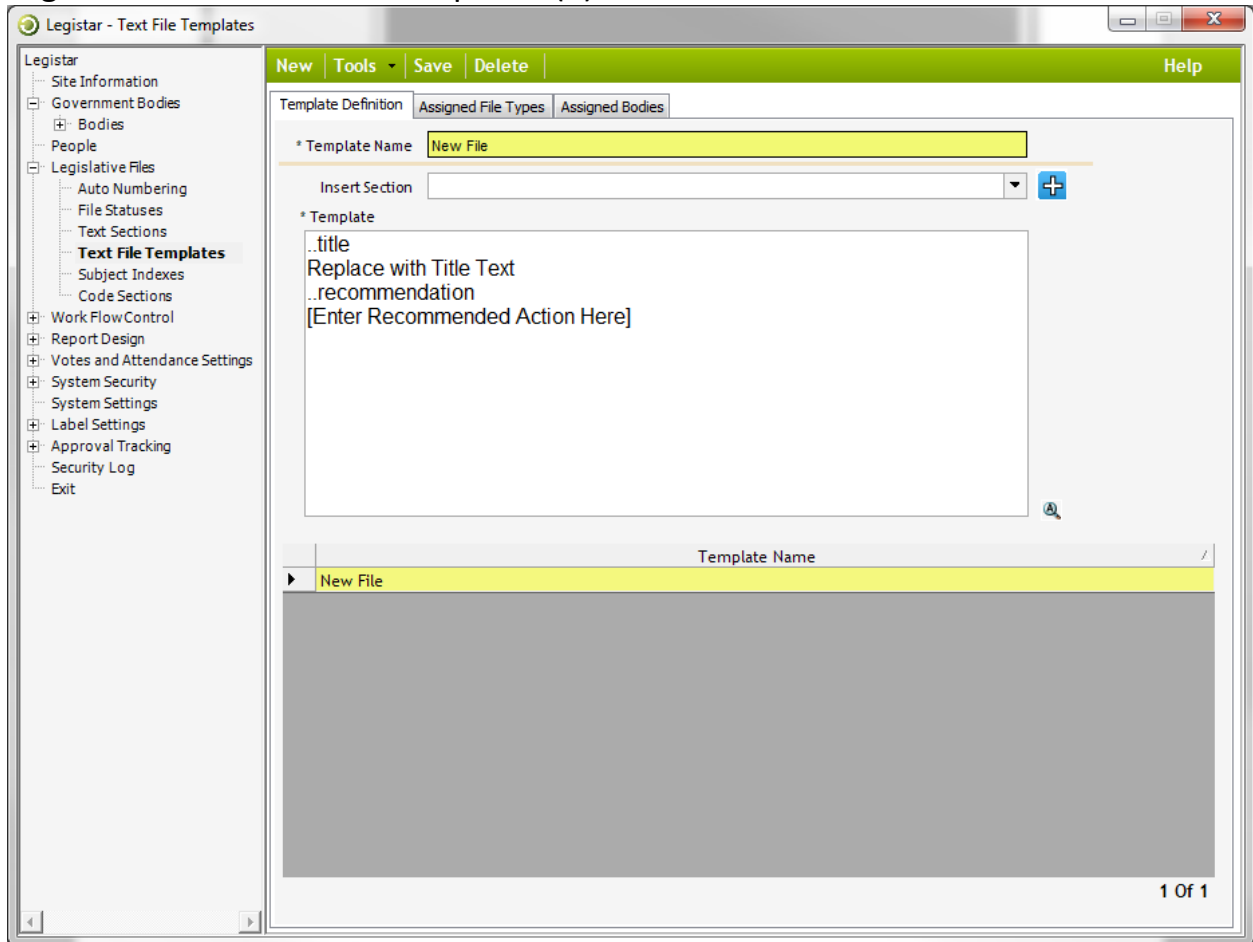
Template: [Enter Body Here]

Section Name	Section Value	Ten
Body	..body	[Enter Body I
Recommendation	..recommendation	[Enter Recon
Title	..title	[Enter Text B

1 of 3

*This is where new text sections for a text file are created. Max number of sections is 8

Legistar - Text File Templates (1)



*Text file templates are 100% the client responsibility. If they would like a new template, refer them to the Customer Success team for a quote

Legistar - Text File Templates (#2 Client is set up to upload .dotx files)

Legistar - Text File Templates

Legistar

- Site Information
- Government Bodies
- People
- Legislative Files
 - Auto Numbering
 - File Statuses
 - Text Sections
 - Text File Templates**
 - Subject Indexes
 - Code Sections
- Work Flow Control
- Report Design
- Votes and Attendance Settings
- System Security
- System Settings
- Label Settings
- Approval Tracking
- Security Log
- Exit

New Tools Save Delete Help

Template Definition Assigned File Types (0) Assigned Bodies (0)

* Template Name Communications Template

Word Template File Name: GLWA_Communication_with_Letterhead +

Template Name
Communications Template
Communications with Letterhead
GLWA Board Letter
GLWA Board Letter With Letterhead

1 Of 4

*When Assigned File Types and Assigned Bodies are set to (0), the template is always available

Legislative Files-Subject Indexes

Legistar - Subject Indexes

New Tools Save Delete Report Search Clear Help

* Index Term Name [Import Subject Indexes](#)

Index Term Name
Acceptance of Property Via Grant or Quitclaim Deed (40)
Agreements (Contracts & Leases, etc.) (45)
Agricultural Commissioner (Ag Extension Services, Farm Advisor) (14)
Air Pollution Control District (Northern Sierra) (24)
Airport (Nevada County) (28)
Animal Control (17)
Behavioral Health/Mental Health Agreements (12)
Board of Supervisors (Election, Committee Appointments) (22)
Bond Release (30)
Bridges (9)
Capital Asset
Certificates/Awards (54)
Chambers of Commerce and Promotion (Fair Exhibits, etc.) (25)
Claims (53)
Closed Sessions (33)
Committees/Commissions (Officers, Misc.) (16)
Community Development Agency (61)
County Building Program (48)
County Service Areas (CSAs) (32)
Courts (15)
Dept. of Public Works (Dept. of Transportation) (Engineering) (5)
Economic Development - ERC, SEDCorp and SPO (55)
Election Precincts (19)
Elections (18)
Emergency Services, Office of (59)
Environmental Health (27)
Fees (36)
Franchises (26)
Grand Jury (7)
Grants Approved and Assisted (64)

1 Of 67

*This list of Indexes is what shows in the Index box on the Associations tab of a file

Legistar - Code Sections

* Section Number Section Name

Section Text

[Import Code Sections](#)

Section	Section Name	Section Text
Sec. A-I 1.1	How Code Designated and Cited	
Sec. A-I 1.2	Definitions and Rules of Construction	
Sec. A-I 1.3	Provisions Considered as Continuations of Existing	
Sec. A-I 1.4	Effect of Repeal of Ordinances	
Sec. A-I 1.5	Severability of Parts of Code	
Sec. A-I 1.6	Catchlines of Sections	
Sec. A-I 1.7	General Penalty; Continuing Violations	
Sec. A-II 1.1	Adoption of State Law Relating to Law Libraries	
Sec. A-II 1.11	Miscellaneous Delegations	
Sec. A-II 1.3	Consolidation of Offices of Clerk and Recorder	
Sec. A-II 1.5	Consolidation of Offices of Sheriff, Coroner and P	
Sec. A-II 1.7	Location and Hours of County Offices	
Sec. A-II 1.9	Adoption of State Law Relative to Qualifications of	
Sec. A-II 10.1	Delinquency Prevention Commission Established	
Sec. A-II 10.3	Delinquency Prevention Commission: Juvenile Ju	
Sec. A-II 13.1	Rates Established Generally	
Sec. A-II 13.11	Assessment Appeals Board	
Sec. A-II 13.2	Paid Meetings Authorized for Planning Commissio	
Sec. A-II 13.7	Drawing of Warrants	
Sec. A-II 13.9	Grand Jury Compensation and Mileage - Grand Ju	
Sec. A-II 14.1	Legislative Intent	
Sec. A-II 14.10	Violations	
Sec. A-II 14.2	Application	
Sec. A-II 14.3	General Rules and Regulations	
Sec. A-II 14.4	Fleet Manager Responsibilities	

1 Of 1708

*This list of Code Sections shows in the Code Sections box on the Associations tab of a file

Workflow Control

Legistar - Work Flow Control

New Tools Save Delete Report Search Clear Help

* Legistar Action (past tense) Abbreviation

Granicus Action (present tense)

Active Tense Takes Target Final Action

Enactment Number Lock The File Procedural Actions

Sort order /	Legistar Action (past tense)	Granicus Action (present tense)	Abbreviation	Active Ter
1	accepted	accept		No
2	adjourned	adjourn		No
3	adopted	Adopt		No
4	adopted as amended	Adopt as Amended		No
5	adopted as substitute	adopt as substitute		No
6	adopted on first reading	adopt on first reading		No
7	adopted on second reading	adopt on second reading		No
8	adopted on third reading	adopt on third reading		No
9	adopted with conditions	adopt with conditions		No
10	affirmed	affirm		No
11	amended	Amend		No
12	amended in City Council	amend in City Council		No
13	amended in Committee	amend in Committee		No
14	appealed	appeal		No
15	appointed	appoint		No
16	approved	Approve		No
17	approved and finalized	approve and finalize		No
18	approved and referred	approve and referre		No
19	approved as amended	Approve as Amended		No
20	approved in Committee	approve in Committee		No
21	approved on the consent agenda	approve on the consent agenda		No
22	approved on the first reading	approve on the first reading		No
23	approved on the second reading	approve on the second reading		No

1 Of 81

*This is a list of the available actions to take in the Minutes

*Legistar Action: what action shows in the Actions drop down on the Actions tab in the minutes

*Granicus Action: what action shows in Live Manager

*Active Tense: will have Legistar use the active tense rather than past tense (default)

*Takes Target: the action sends the file to a different controlling body

*Final Action: the action applies a final action date to the file

*Enactment Number: the action applies an enactment number to the file

*Lock the File: the action locks the file

*Procedural Actions: the action is available to take on a header line

Workflow Control-Agenda Definitions-Agenda Settings

Sequence	Agenda Number	Section Header	Section Footer	Header Level	Force	Body Type
10		Call to Order		1	Yes	Primary Legislativ
20		Roll Call		1	Yes	Primary Legislativ
30		Proclamations		1	Yes	Primary Legislativ
40		Approval of Minut		1	Yes	Primary Legislativ
50		Consent Agenda		1	Yes	Primary Legislativ
60		Ordinances on Se		1	Yes	Primary Legislativ
70		Ordinances on Fir		1	Yes	Primary Legislativ
80		New Business		1	Yes	Primary Legislativ
90				1	Yes	Primary Legislativ
100		Old Business		1	Yes	Primary Legislativ
110		Public Hearing		1	Yes	Primary Legislativ
120		Citizen Comment		1	Yes	Primary Legislativ
130		Adjournment		1	Yes	Primary Legislativ

*Copy Body Type data from: this tool overwrites all data in the workflow. It is typically used on initial setup only

*Sequence: determines where the line generates on the agenda

*Agenda Number: automatically adds a number on the line when the agenda is generated

*Section Header: this is the actual verbiage of the header

*Style: what font type and margins are automatically applied to the header

*Section Footer: will generate a line of text at the bottom of the section

*Force Header: if you want the header to generate on the agenda, check the box. If you want the header to only be available in the list to add to the agenda, do not check the box

*Controlling Body: this drop down is typically only used in the Primary Legislative Body workflow. It tells the agenda to pull certain files from a certain body. This field works in conjunction with the File Type drop down and the File Status drop down. If the File Type and File Status drop downs are not filled in, but Controlling Body is, then all [available] files owned by that body will pull in. File Type and File Status are limiting factors.

*File Type: when a file type is selected, [available] files will pull in. This field works in conjunction with the File Status drop down. If the File Status drop down is not filled in, but File Type is, then all [available] files with that type will pull in. File Status is a limiting factor.

*File Status: when a file status is selected, [available] files will pull in. This field works in conjunction with the File Type drop down. If the File Type drop down is not filled in, but File Status is, then all [available] files with that status will pull in. File Type is a limiting factor

Workflow Control-Agenda Definitions-Advance Settings

The screenshot displays the 'Legistar - Primary Legislative Body' application window. The left sidebar contains a tree view with categories like 'Site Information', 'Government Bodies', 'People', 'Legislative Files', and 'Work Flow Control'. Under 'Work Flow Control', 'Primary Legislative Body' is expanded, showing various roles and committees. The main window has a green header bar with 'New', 'Tools', 'Save', 'Delete', 'Report', 'Search', and 'Clear' buttons, and a 'Help' button. Below the header, there are tabs for 'Agenda Definitions' and 'Workflow Actions'. The 'Agenda Settings' sub-tab is selected, showing two text input fields: 'Edit Standard Paragraph' and 'Edit Sql'. The 'Edit Sql' field contains the query: `(mtStatusID IN (24, 37)) AND (mtBodyID IN (3))`. Below the input fields is a table with the following data:

Sequence	Agenda Number	Section Header	Section Footer	Header Level	Force	Body Type
10	1.	Roll Call		0	Yes	Primary Legislat
20	2.	Invocation		0	Yes	Primary Legislat
30	3.	Adoption of Minut		0	Yes	Primary Legislat
40	4.	Messages & Pape		0	Yes	Primary Legislat
50	5.	Communications		0	Yes	Primary Legislat
60	6.	Petitions and Con		0	Yes	Primary Legislat
70	7.	Land Use Call-Ups:		0	Yes	Primary Legislat
80	8.	Communication fi		0	Yes	Primary Legislat
90	9.	Discussion of Gen		0	Yes	Primary Legislat
100	10.	Reports of Specia		0	Yes	Primary Legislat
110	11.	Reports of Standii		0	Yes	Primary Legislat
130		Report of the Cor		0	No	Primary Legislat
131		Report of the Cor		0	No	Primary Legislat
135		Report of the Cor		0	No	Primary Legislat
137		Report of the Cor		0	No	Primary Legislat

The table has a scrollbar on the right side, and the current page is 12 of 101.

*When modifying work flows, be sure to check if there are SQL statements. Do not edit if there are any statements. Statements are specific to the header line.

*Standard Paragraphs auto-generate text in the Comment field on the agenda

Workflow Control-Workflow Actions-Main

The screenshot shows the 'Workflow Actions' configuration window in Legistar. The sidebar on the left lists the system structure, with 'Primary Legislative Body' selected. The main window has a menu bar with 'New', 'Tools', 'Save', 'Delete', 'Report', 'Search', 'Clear', and 'Help'. The 'Workflow Actions' tab is active, showing configuration fields for 'File Type' (City Agency Report), 'Action' (Filed by Council), 'File Status', 'Status on Pass' (Filed), and 'Status on Fail'. There are checkboxes for 'Standard Action', 'Active' (checked), and 'Close Referral'. Below the fields is a table listing various workflow actions with columns for Body Type, File Type, Action, Status on Pass, Status on Fail, and File Status.

Body Type	File Type	Action	Status on Pass	Status on Fail	File Status	R
Primary Legislativ	City Agency Repo	Filed by Council	Filed			
Primary Legislativ	City Agency Repo	Introduced by Co	Introduced			
Primary Legislativ	City Agency Repo	Rcvd, Ord, Prnt, I	Received, Ordere			
Primary Legislativ	City Agency Repo	Referred to Comi	Committee			
Primary Legislativ	Commissioner of	Approved by Cou				
Primary Legislativ	Commissioner of	Approved, by Cou	Adopted	Failed		
Primary Legislativ	Commissioner of	Filed (End of Sess	Filed (End of Sess		Filed (End of Sess	
Primary Legislativ	Communication	Approved, by Cou	Adopted	Failed		
Primary Legislativ	Communication	Deferred				
Primary Legislativ	Communication	Filed (End of Sess	Filed (End of Sess		Filed (End of Sess	
Primary Legislativ	Communication	Filed by Council	Filed			
Primary Legislativ	Communication	Introduced by Co	Introduced			
Primary Legislativ	Communication	Rcvd, Ord, Prnt, I	Received, Ordere			
Primary Legislativ	Communication	Referred to Comi	Committee			
Primary Legislativ	Communication	Withdrawn by Ma	Filed			
Primary Legislativ	Communication	Withdrawn by Pul	Filed			
Primary Legislativ	Introduction	Amended by Cou	General Order Ca			
Primary Legislativ	Introduction	Amendment Defe	Failed		Failed	
Primary Legislativ	Introduction	Amendment Prop				

*Workflow actions determine if a file can be added to an agenda. If there is not an action for the file type, then you will not be able to add the file

*File Type: determines which files you can apply the action to

*File Status: determines which files you can apply the action to. This is dependent on file type- this is a limiting factor. (When the file type and file status are listed, then the action will be available)

*Action: determines which action is available

*Status on Fail: if the vote fails, then the file will move to this status

*Status on Pass: if the vote passes, then the file will move to this status

*Standard Action: only one standard action per file type. This action is the action that is applied during a consent vote

*Close Referral: will close a referral if the client has Multiple Referrals turned on.

Workflow Control-Workflow Options-Vote and Attendance Type

Legistar - Vote and Attendance Types

New Tools Save Delete Report Help

* Vote\Attendance Type Name: Present Granicus Vote Type Name: [Dropdown]

* Plural Name: Present Granicus Attendance Type Name: [Dropdown]

Used For: Attendance Voting Both

Result Tally: Yes No Neither

Show On Reports: Always If greater than 0 Never

Sort	Vote Name	Plural Name	Used For	Result Tally	Show on Reports	Gran
1	Present	Present	Attendance	Neither	If greater than 0	
2	Affirmative	Affirmative	Voting	Yes	If greater than 0	
3	Negative	Negative	Voting	No	If greater than 0	
4	Excused	Excused	Both	Neither	If greater than 0	
5	Abstain	Abstain	Voting	Neither	If greater than 0	
6	Recused	Recused	Voting	Neither	If greater than 0	
7	Non-voting	Non-voting	Voting	Neither	If greater than 0	
8	Absent	Absent	Both	Neither	If greater than 0	
9	Maternity	Maternity	Both	Neither	If greater than 0	
10	Suspended	Suspended	Both	Neither	If greater than 0	
11	Conflict	Conflict	Both	Neither	If greater than 0	
12	Paternity	Paternity	Both	Neither	If greater than 0	
13	Jury Duty	Jury Duty	Both	Neither	If greater than 0	
14	Medical	Medical	Both	Neither	If greater than 0	
15	Simultaneous	Simultaneous	Both	Neither	If greater than 0	
16	Bereavement	Bereavement	Both	Neither	If greater than 0	

1 Of 16

*This is where vote and attendance values are set up

*Vote\Attendance Type Name: value for attendance or vote (or both)

*Plural Name:

*Granicus Vote Type Name: mapping for Live Manager votes (1:1)

*Granicus Attendance Type Name: mapping for Live Manager attendance (1:1)

*Used For: Attendance (value will only be available in Attendance – if not “present” member will not show in vote), Voting (value will only be available in Votes), Both (value will be available for attendance and votes)

*Result Tally: Yes (will consider this vote a yes vote), No (will consider this vote a no vote), Neither (will not consider the vote yes or no)

*Show on Reports: Always (will show the value, even if it has not been selected), If greater than 0 (will show the value if it has been used), Never (will not show the value)

Workflow Control-Workflow Options-Motion Text-Edit Motion and Vote Text

*BEFORE EDITING MOTION TEXT BE SURE TO SELECT THE MOTION TEXT TYPE FROM THE MOTION TEXT DROP DOWN ON THE GREEN BAR

***Default Action:**

*No Vote Action: this motion text is shown when there has not been a vote, but motion text has been selected

*Rollcall: this motion text is shown when there has been a rollcall vote

*Voice Vote: this motion text is shown when there has been a voice vote

*Consent Rollcall Master Line: this motion text is shown on the master line of a consent vote when the vote type is "rollcall"

*Consent Voice: this motion text is shown on the individual files of a consent vote when the vote type is "voice"

*Consent Voice Master Line: this motion text is shown on the master line of a consent vote when the vote type is "voice"

*Consent Rollcall: this motion text is shown on the individual files of a consent vote when the vote type is "rollcall"

Workflow Control-Workflow Options-Meeting Statuses

Legistar - Meeting Statuses

New | Tools | Save | Delete | Report | Help

* Status Name * Show On

Status Name	Show On
Draft	Agendas and Minutes
Final	Agendas and Minutes
Final-revised	Agendas and Minutes

1 Of 3

*This is where meeting statuses are listed

*Do not edit the "Final" status.

Workflow Control-Workflow Options-Standard Paragraphs

The screenshot shows the 'Legistar - Standard Paragraphs' application window. The interface includes a menu bar with options: New, Tools, Save, Delete, Report, Search, Clear, and Help. A left-hand navigation pane lists various system settings, with 'Standard Paragraphs' selected. The main workspace is divided into two sections. The top section is a form for editing a paragraph, with the following fields:

- * Paragraph Name: Call To Order
- * Paragraph Text: The [Insert Name] called the meeting to order at [insert time].

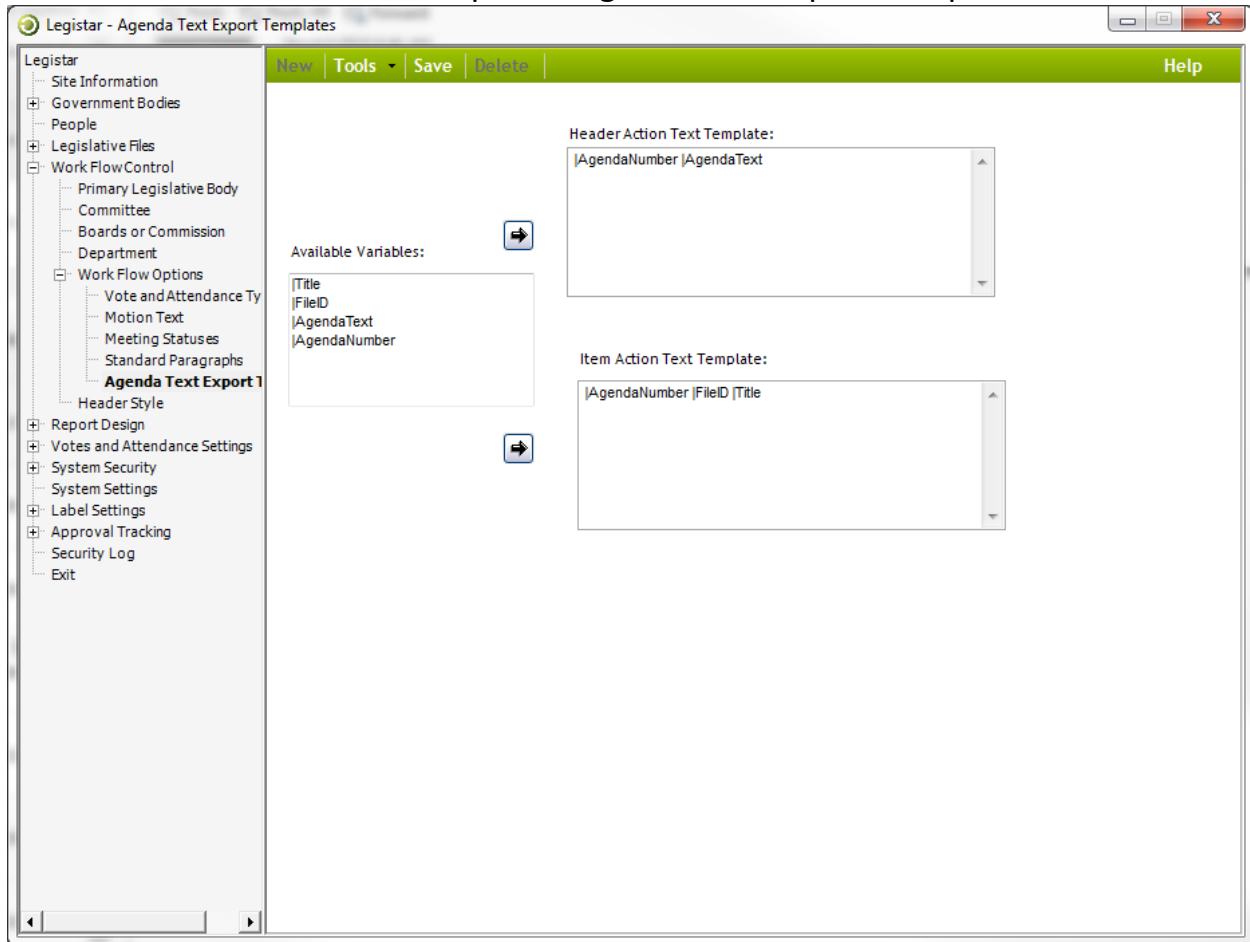
Below the form is a table listing standard paragraphs:

Paragraph Name	Paragraph Text
Call To Order	The [Insert Name] called the meeting to order at [insert time].
Disability Boilerplate	If you require special access to attend please contact the Clerk's office 48 hours
Meeting Adjournment	The meeting was adjourned at [INSERT TIME] by [INSERT NAME]. The next sche
Minutes Signature	
Public Speaking	Each speaker will be limited to three (3) minutes.

The bottom right corner of the window displays '1 Of 5'.

*Standard Paragraphs are commonly used sentences and paragraphs that can be copied to the clipboard and pasted into Legistar as needed

Workflow Control-Workflow Options-Agenda Text Export Templates



*Used for Laserfiche

Workflow Control-Header Style

Legistar - Header Style

New | Tools | Save | Delete | Help

Header Level: 0

* Justification: Left Aligned Indentation: 0.00

* Style Info: Arial, 12, Regular

Preview: Header Level Preview

Head	Justification	Font Name	Font	Bold	Underline	Italics	Indentation
0	Left Aligned	Arial	12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00
1	Left Aligned	Arial	14	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00
2	Left Aligned	Arial	12	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00
3	Left Aligned	Arial	12	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.25
4	Centered	Arial	12	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00

1 Of 5

*This is where Header Styles are set up. Styles are used in the workflow.

Report Design-Legislative Files-Certified Copy-Settings

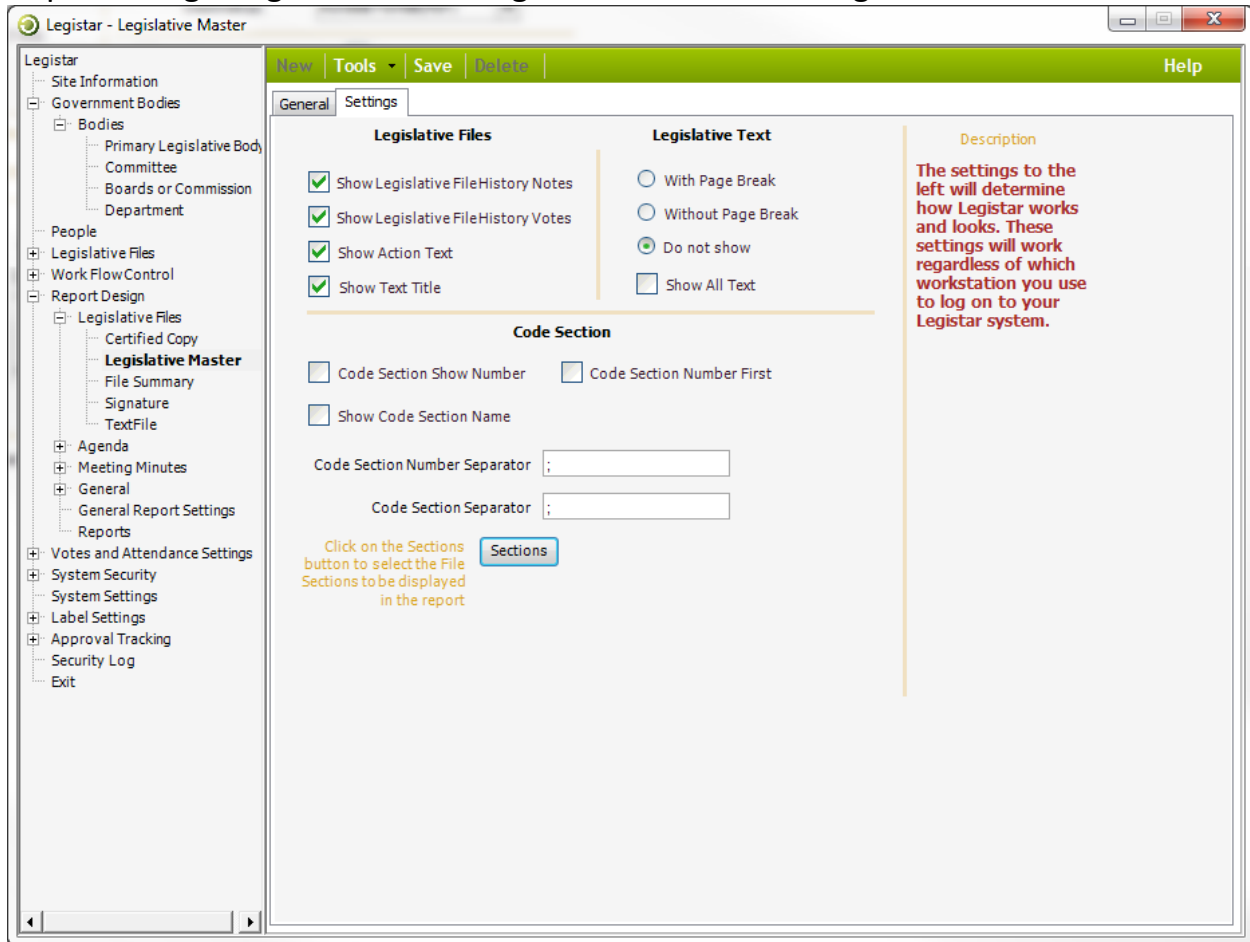
*Signer1: when a body is chosen, it populates the Signer1 drop down with names of all members with “Can sign” checked

*Signature Text1: the label next to the signature

*Display: how the signer’s name shows below the signature line

*To pull in the |Clerk variable: the Clerk’s body needs to be marked in General Report Settings AND there needs to be an office member record in the body with “Can sign” checked and office title set to Clerk.

Report Design-Legislative Files-Legislative Master-Settings



*Code Sections are set up in Admin and pull in to the Details tab of a file

Report Design-Legislative Files-Signature-Settings

Legistar - Signature

Site Information
 Government Bodies
 People
 Legislative Files
 Work FlowControl
 Report Design
 Legislative Files
 Certified Copy
 Legislative Master
 File Summary
Signature
 TextFile
 Agenda
 Meeting Minutes
 General
 General Report Settings
 Reports
 Votes and Attendance Settings
 System Security
 System Settings
 Label Settings
 Approval Tracking
 Security Log
 Exit

Settings

AvailableVariables
 Clerk Name |CLERK|
 Matter Type |FILETYPE|
 File Number |FILENUMBER|
 Matter Status |FILESTATUS|
 Acting Body |ACTINGBODY|
 Vote Result |RESULT|
 Action |ACTION|
 Action Date |ACTDATE|

Signature Block
 At a meeting of the |MBODY on |
 MDATE, a motion was made by |
 MOVERDISPLAYNAME, seconded by |
 |SECONDERDISPLAYNAME, that this

Preview

Use Digital Signature
 Signature Text1 Approved as to Form
 Signer1 Clerk's Office

Use Digital Signature
 Signature Text2 Attest by
 Signer2 City Council

Use Digital Signature
 Signature Text3 Certified by
 Signer3 Municipal Courts

Use Digital Signature
 Signature Text4 optional text4(Admin)
 Signer4

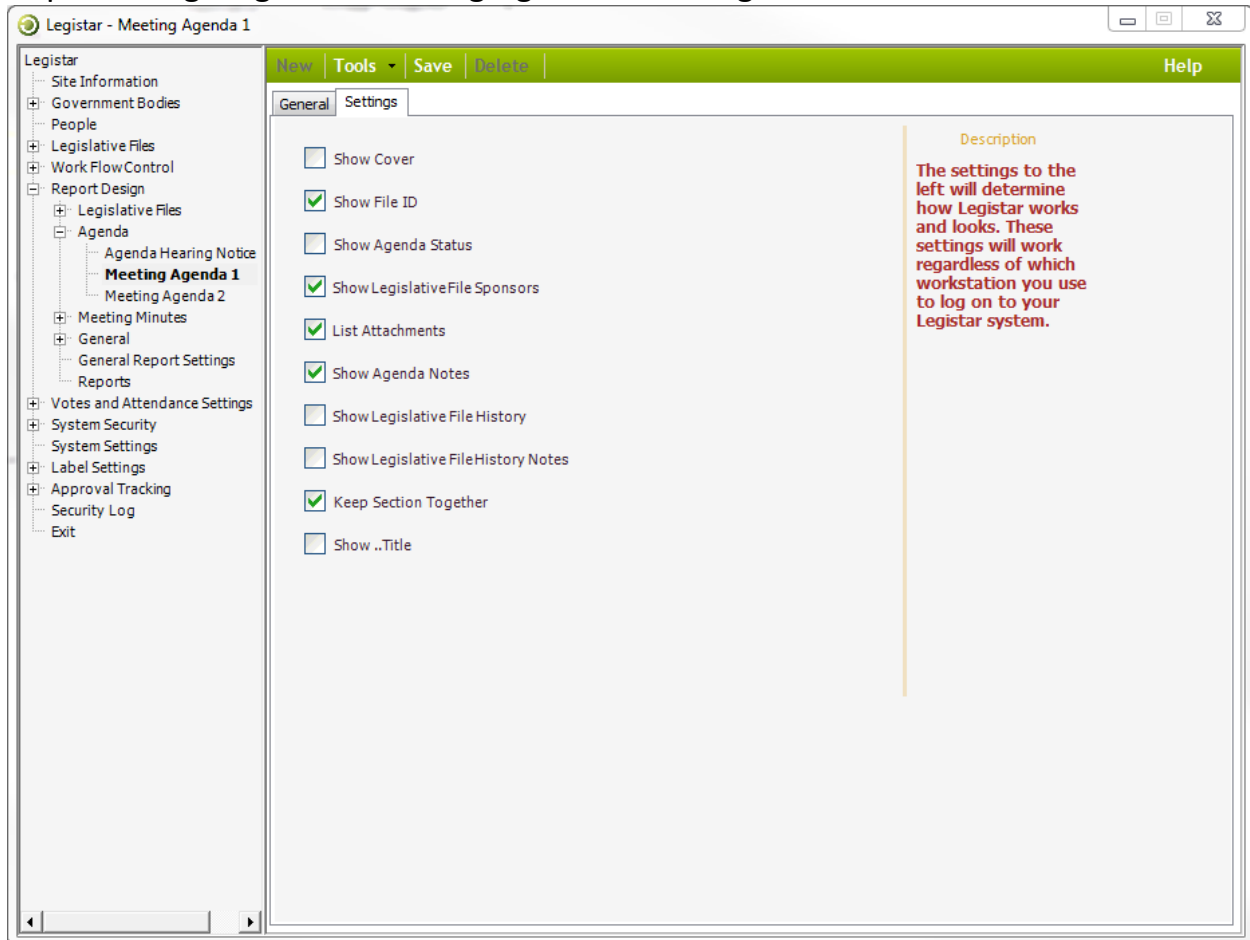
Use Digital Signature
 Signature Text5 optional text 5(Admin)
 Signer5

Display: [Office Title][Display Name]

Description
 The settings to the left will determine how Legistar works and looks. These settings will work regardless of which workstation you use to log on to your Legistar system.

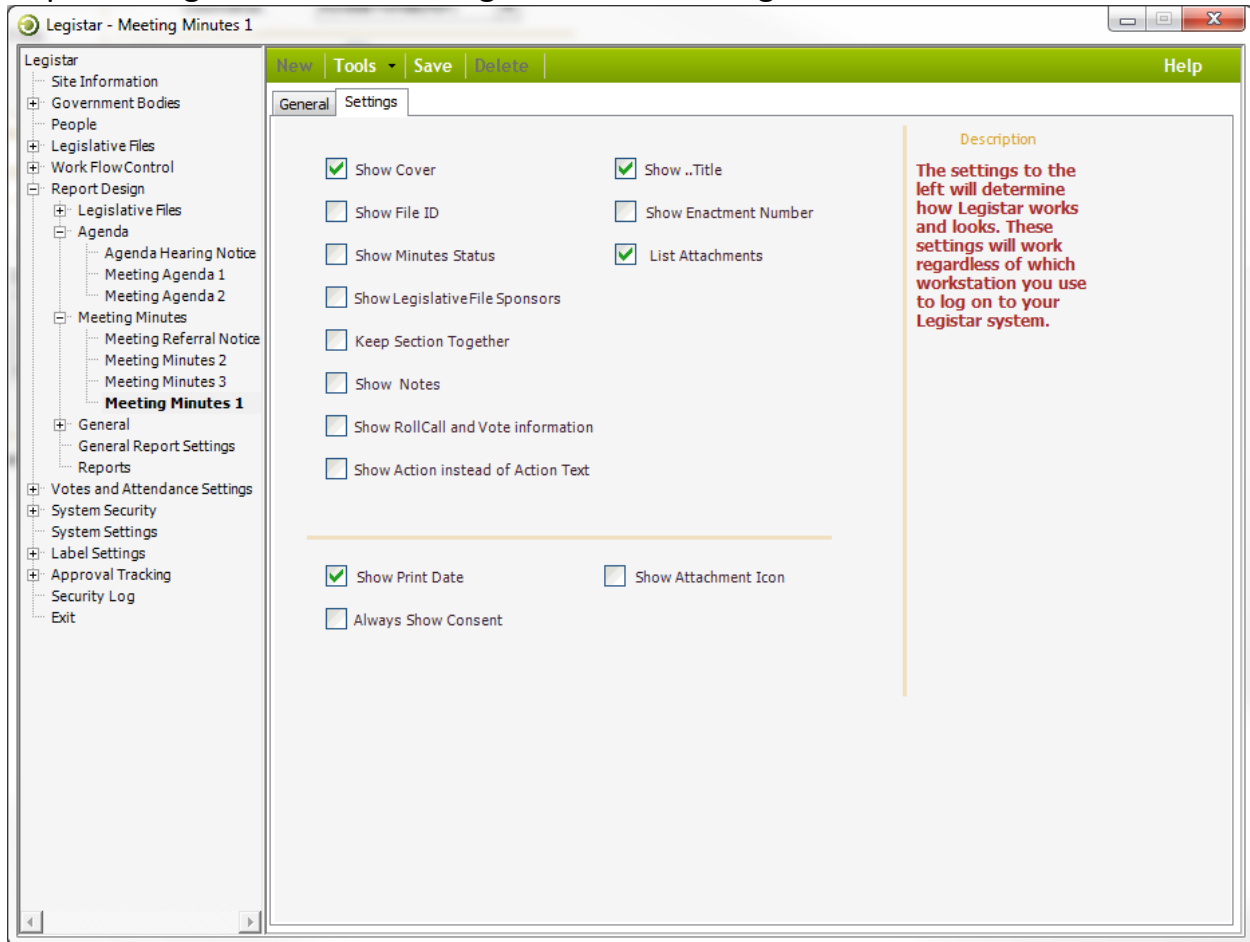
- *Signer1-4: when a body is chosen, it populates the Signer1 drop down with names of all members with "Can sign" checked
- *Signature Text1-4: the label next to the signature
- *Display: how the signer's name shows below the signature line

Report Design-Agenda-Meeting Agenda 1-Settings



- *Show Cover: prints the cover page with the agenda
- *Show File ID: shows the file ID
- *Show Agenda Status: shows the agenda status
- *Show Legislative File Sponsors: lists the file sponsors
- *List Attachments: lists all attachments that are selected to “Print on Reports”
- *Show Agenda Notes: shows the agenda note/comment
- *Show Legislative File History: shows the history lines of the file (what is listed in Minutes History tab)
- *Show Legislative File History Notes: shows the notes for the history lines of the file
- *Keep Section Together: groups together data under each header
- *Show ..Title: pulls the title from the text file (not the title box)

Report Design-Minutes-Meeting Minutes 1-Settings



*Show Cover: shows cover page with minutes

*Show File ID: shows file ID

*Show Minutes Status: shows minutes status

*Show Legislative File Sponsors: shows the sponsors of the file (Associations tab)

*Show Legislative File History: shows the history lines of the file (what is listed in Minutes History tab)

*Keep Section Together: groups together data under each header

***Show Notes:**

*Show Roll Call and Vote Information: shows roll calls and votes

*Show Action instead of Action Text: shows the action instead of motion text

*Show ..Title: pulls the title from the text file (not the title box)

*Show Enactment Number: shows enactment number

*List Attachments: lists all attachments that are selected to "Print on Reports"

*Show Print Date: shows "Printed on xx/xx/xxxx" in the footer

*Show Attachment Icon: shows a cute little paperclip next to attachments

***Always show Consent:**

Report Design-General Report Settings

- *Always show Consent Votes: shows consent votes under each item rather than once for the entire block
- *Attachments base URL:
- *Build Custom File Name:
- *Clerk Body: used for signature report and certified copy report- helps to define |Clerk variable
- *Executive Body ID:
- *Executive Office Member Type:
- *Exported Report Date Format: date shown in Media Manager even title
- *Hearing Notices Sent Action ID:
- *Hearing Notices Sent Transmitted Date Format:
- *HTML Report base URL:
- *HTML Report export path:
- *Indexes Separator: shows on reports when multiple Indexes are listed
- *Publication Report:
- *Show Voice Vote: shows individual votes on report
- *Requires Final Action-Certified Copy: this allows the Certified Copy report to run with Signature with/without final action date
- *Requires Final Action-Signature Report: this allows the Signature report to run with Signature with/without final action date
- *Report Base URL for web:
- *Report export path for web:
- *Send Email with Compose Message Dialog:
- *Short Agenda Council Boiler 1:
- *Show Attachment Icon: shows a cute little paperclip next to attachments
- *Show Hyperlinks in Reports: shows hyperlinks with blue-underlined font in reports
- *Show Section Names: shows ..Title, ..Body, etc. in reports
- *Split Votes and Rollcall:
- *Use Generic Master Report Vote Format:
- *Use Meeting Date for Web:
- *Use RTF Format:
- *Hearing Notices Boiler: boiler text for Hearing Notice Report
- *Use Year Month Folders for Web:
- *Publish Action ID:
- *Publish to Calendar File Format: what file type the agenda is on Insite
- *ComboBox Name Format:
- *Sponsor Format: how sponsor names are displayed on reports
- *Remove dots from Section: shows ..Title as Title
- *Separate Sponsor Names with: shows on reports when multiple sponsors are listed
- *Replace Last Sponsor Separator with: shows on reports for easy reading of multiple sponsor names
- *Show Sponsor Mark in Reports: shows primary mark next to the primary sponsor name, secondary mark next to the secondary sponsor name, tertiary mark next to the tertiary sponsor name

Report Design-Reports (**THIS IS A DAYSTAR ONLY SECTION**)

The screenshot shows the 'Legistar - Reports' application window. The left sidebar contains a tree view with categories like 'Site Information', 'Government Bodies', 'People', 'Legislative Files', 'Work Flow Control', 'Report Design', 'Legislative Files', 'Agenda', 'Meeting Minutes', 'General', 'General Report Settings', 'Reports', 'Votes and Attendance Settings', 'System Security', 'System Settings', 'Label Settings', 'Approval Tracking', 'Security Log', and 'Exit'. The main area is titled 'New | Tools | Save | Delete | Report | Help'. It contains several input fields for configuring a report:

- * Report ID: 6
- * Program Area: Matter
- * Report Name: Signature
- Alternate Name: (empty)
- * File Name: rptSignatureReportGeneric.rpt
- Display Name: Signature Report
- Description: (empty)
- Procedure Name: (empty)
- Report Filter Criteria: (empty)
- Class Name: uctLegislativeFileSettings
- Generation Class Name: LegistarSignatureReport
- Report Image: signature.ico
- Report Sort Order: 2

Below the form is a table listing existing reports:

Sort	Report ID	Program Area	Report Name	Alternate Name	File Name	Display Name	Proce
2	6	Matter	Signature		rptSignatureRepo	Signature Report	
999	7	Matter	CertifiedCopy		rptCertifiedCopyC	Certified Copy	
9	10	Minutes	MeetingReferralN		rptMinutesReferr	Meeting Referral	
1	14	General	GeneralCertificati		rptGeneralCertific	General Certificat	
2	15	General	HearingNotices		rptHearingNotice.	Hearing Notices	
4	16	General	MattersIntroduced		rptMattersIntrodu	Files Introduced	
5	17	General	MeetingAttendanc		rptMeetingAttend	Meeting Attendan	
6	18	General	MeetingCalendar		rptMeetingCalend	Meeting Calendar	
9	19	General	VotingRecord		rptVotingRecord.i	Voting Record	
3	20	General	MatterSummaryG		rptGenericMatter	File Summary	
8	21	General	SubjectMatterIndi		rptSubjectMatterI	Subject Matter In	
997	22	Admin	MatterTypes		rptMatterTypeList	Matter Types	QRYMA
996	23	Admin	MatterStatuses		rptStatusTableList	Matter Statuses	QRYMA
974	24	Admin	Actions		rptActionTableLis	Actions	QRYAC
995	25	Admin	ValidActions		rptListingOfValidA	Valid Actions	QRYVA
994	26	Admin	Vote&Attendance		rptVoteTypeListin	Vote & Attendanc	QRYVO
993	27	Admin	IndexTerms		rptIndexTermsLis	Index Terms	QRYINI
992	28	Admin	MunicipalCodeSec		rptCodeSectionsL	Municipal Code S	QRYCO
991	29	Admin	BodyTypes		rptBodyTypeListir	Body Types	ORYBO

*Program Area: Admin-reports available in Administration, Agenda-reports available in the Agenda Module, General- reports available from the home screen, Matter- reports available in the Files Module, Minutes- reports available in the Minutes Module, Search- report available after performing a search

*Report Name: generic name for the report

*Alternate Name: this field is used when the name that is shown on the report is different than what needs to show in the Reports drop down

*File Name: this field is the name of the report in the report repository. When the name starts with rpt (rptMeetingMinutesGenericNew.rpt), it is the generic report. Customized reports start with the client's 4-letter identifier (STALrptMeetingMinutesGenericNew.rpt)

*Display Name: name shown in the Reports drop down. This will show on the report if there is not an Alternate Name listed

Votes and Attendance Settings-Vote Format

*Display: Voter Names- only lists voter names (Aye: John Robinson and Sally Peters, No: Mike Jones and Lisa Roberts), Tally- only lists the number of votes (Aye: 6, No: 0), Voter Names and Tally (Aye: (2) John Robinson and Sally Peters, No: (2) Mike Jones and Lisa Roberts)

*Tally Format: Horizontal- Mike Jones, Lisa Roberts, John Robinson and Sally Peters

Vertical- Mike Jones

Lisa Roberts

John Robinson

Sally Peters

*Show Vote Types in Tally: Yes (Aye: 6, No: 0), No (6:0)

*Format: Singular (Aye/No), Plural (Ayes/Noes)

*Separate Vote Types with: shows after the vote value (Aye: / No☺)

*Prefix All Votes with: generic text that shows before votes on reports

*Prefix All Names with: generic text that shows before each name in a vote on a report

*Separate Names with: shows on reports when multiple names are listed in votes

*Replace Last Separator with: shows on reports for easy reading of multiple vote names

*Select a Member Type to set its name display format in the vote text: MUST HIGHLIGHT ONE OF THE MEMBER TYPES TO SEE/MODIFY DISPLAY OF VOTER NAMES. Display is shown below the white box

Votes and Attendance Settings-Attendance Format

Legistar - Default Display Settings

New | Tools | Save | Delete | Help

Vote Format | Attendance Format | Default Display Settings

* Display: Attendees and Tally

* Tally Format: Horizontal

* Show Attendance Types In Tally: Yes

* Format: Singular

Separate Attendance Types With: _____

Prefix All Attendances With: _____

Prefix All Names With: _____

Separate Names With: _____

Replace Last Separator With: and

Select a Member Type to set its name display format in the attendance text.

Chair
Member
Vice Chair

Vice Chair Format

Display: [Title][Display Name]

Title Format: Office Title

Title: _____

Preview

*Display: Attendees - only lists attendee names (Present: John Robinson and Sally Peters, Absent: Mike Jones and Lisa Roberts), Tally- only lists the number of attendees (Present: 6, Absent: 0), Attendees and Tally (Present: (2) John Robinson and Sally Peters, Absent: (2) Mike Jones and Lisa Roberts)

*Tally Format: Horizontal- Mike Jones, Lisa Roberts, John Robinson and Sally Peters

Vertical- Mike Jones

Lisa Roberts

John Robinson

Sally Peters

*Show Attendance Types in Tally: Yes (Present: 6, Absent: 0), No (6:0)

*Format: Singular (Present/Absent), Plural (Presents / Absents)

*Separate Attendance Types with: shows after the attendance value (Present: / Absent:)

*Prefix All Names with: generic text that shows before attendees on reports

*Prefix All Names with: generic text that shows before each name in the attendance on a report

*Separate Names with: shows on reports when multiple names are listed in attendance

*Replace Last Separator with: shows on reports for easy reading of multiple attendee names

*Select a Member Type to set its name display format in the vote text: MUST HIGHLIGHT ONE OF THE MEMBER TYPES TO SEE/MODIFY DISPLAY OF ATTENDEE NAMES. Display is shown below the white box

System Security-Security Features-Functional List (**Must choose user group before editing permissions**)

*Administration

- *Access Admin Action Text: set up action/motion text (Workflow Control>Workflow Options>Motion Text)
- *Access Admin Actions: set up actions (Workflow Control)
- *Access Admin Agenda Definitions: set up agenda definitions for bodies (Workflow Control>[Body Type]>Agenda Definitions)
- *Access Admin Approval Definitions: set up approval definitions (Approval Tracking>Approval Definitions)
- *Access Admin Approval Statuses:
- *Access Admin Archive Matters:
- *Access Admin Bodies: (Government Bodies>Bodies)
- *Access Admin Body Headers: (Government Bodies>Bodies>Body Header tab)
- *Access Admin Body Types: (Government Bodies)
- *Access Admin City-State-Zip:
- *Access Admin Code Sections: (Legislative Files>Code Sections)
- *Access Admin Email Templates: (Approval Tracking>Email Templates)
- *Access Admin Index Terms: (Legislative Files>Subject Indexes)
- *Access Admin Label Settings: (Label Settings)
- *Access Admin Legislative File Auto-Keys: (Legislative Files>Auto Numbering)
- *Access Admin Legislative File Status: (Legislative Files>File Statuses)
- *Access Admin Legislative File Types: (Legislative Files)
- *Access Admin Mailing List:
- *Access Admin Meeting Body Restrictions:
- *Access Admin Meeting Statuses: (Workflow Control>Workflow Options>Meeting Statuses)
- *Access Admin Name List Members:
- *Access Admin Name Lists:
- *Access Admin Office Information:
- *Access Admin Personal Information:
- *Access Admin Program Settings:
- *Access Admin Report Designer: (Report Design)
- *Access Admin Reports: (Report Design>Reports)
- *Access Admin RollCall and Votes Advanced: (Votes And Attendance Settings)
- *Access Admin Security Goups: (System Security)
- *Access Admin Security Restrictions: (System Security>Security Features)
- *Access Admin Site Information: (Site Information)
- *Access Admin Standard Paragraphs: (Workflow Control>Workflow Options>Standard Paragraphs)
- *Access Admin System Messages:
- *Access Admin Text File Sections: (Legislative Files>Text Sections)
- *Access Admin Text File Templates: (Legislative Files>Text File Templates)
- *Access Admin Titles:
- *Access Admin Users: (System Security>User Accounts)
- *Access Admin Valid Actions:
- *Access Admin Vote and Attendance Types: (Workflow Control>Workflow Options>Vote and Attendance Types)

*Access Admin Work Flow Control: (Workflow Control)

*Access Admin Security:

*General

*Access Administration: access Admin from Home Screen

*Access Full Text Search:

*Access General Reports: access Reports from Home Screen

*Access Legislative Files: access File Module

*Access Meeting Agendas: access Agenda Module

*Access Meeting Minutes: access Minutes Module

*Access Password Tab: access Password tab in Local Settings

*Access Program Settings Tab:

*Legislative Files

*Access File Packet Archive Utility:

*Access Legislative File Attachments: access Attachments tab

*Access Legislative File History: access Minutes History tab

*Access Legislative File Quick Info:

*Access Legislative File Supp Info1: access Supp Info1 tab

*Access Legislative File Supp Info2: access Supp Info2 tab

*Access Legislative File Text Files: access text file tab

*Add Legislative File Attachments: add new attachments to file

*Add Legislative File History: add history line to file (ad-hoc)

*Add Legislative File Text Files: add text file to file

*Add Legislative Files: create new file

*Batch Delete File: perform mass delete of files

*Delete Legislative File Attachments: delete attachments from file

*Delete Legislative File History: delete ad-hoc history line on file

*Delete Legislative File Text Files: delete text file from file

*Delete Legislative Files: delete files individually

*Edit File Agenda Number: edit Agenda Number field on Details tab

*Edit File Contact Information: edit Contact field on Details tab

*Edit File Cost: edit Cost field on Details tab

*Edit File Drafter: edit Drafter field on Details tab

*Edit File Enactment Date: edit Enactment Date field on Details tab

*Edit File Enactment Number: edit Enactment Number field on Details tab

*Edit File Hearing Date: edit Hearing Date field on Details tab

*Edit File Name: edit File Name field on Details tab

*Edit File Next Meeting Body: edit Next Meeting Body field on Details tab

*Edit File Next Meeting Date: edit Next Meeting Date field on Details tab

*Edit File Notes: edit Notes field on Details tab

*Edit File Reference: edit Reference field on Details tab

*Edit File Requester: edit Requester field on Details tab

*Edit File Supplemental Info Tab1 Date1: edit Generic Date1 field on Extra Info1 tab

*Edit File Supplemental Info Tab1 Date2: edit Generic Date2 field on Extra Info1 tab

*Edit File Supplemental Info Tab1 Date3: edit Generic Date3 field on Extra Info1 tab

*Edit File Supplemental Info Tab1 Date4: edit Generic Date4 field on Extra Info1 tab

*Edit File Supplemental Info Tab1 Date5: edit Generic Date5 field on Extra Info1 tab

*Edit File Supplemental Info Tab1 Text1: edit Generic Text1 field on Extra Info1 tab

- *Edit File Supplemental Info Tab1 Text2: edit Generic Text2 field on Extra Info1 tab
- *Edit File Supplemental Info Tab1 Text3: edit Generic Text3 field on Extra Info1 tab
- *Edit File Supplemental Info Tab1 Text4: edit Generic Text4 field on Extra Info1 tab
- *Edit File Supplemental Info Tab1 Text5: edit Generic Text5 field on Extra Info1 tab
- *Edit File Supplemental Info Tab1 Text6: edit Generic Text6 field on Extra Info1 tab
- *Edit File Supplemental Info Tab2 Date1: edit Generic Date1 field on Extra Info2 tab
- *Edit File Supplemental Info Tab2 Date2: edit Generic Date2 field on Extra Info2 tab
- *Edit File Supplemental Info Tab2 Date3: edit Generic Date3 field on Extra Info2 tab
- *Edit File Supplemental Info Tab2 Date4: edit Generic Date4 field on Extra Info2 tab
- *Edit File Supplemental Info Tab2 Date5: edit Generic Date5 field on Extra Info2 tab
- *Edit File Supplemental Info Tab2 Text1: edit Generic Text1 field on Extra Info2 tab
- *Edit File Supplemental Info Tab2 Text2: edit Generic Text2 field on Extra Info2 tab
- *Edit File Supplemental Info Tab2 Text3: edit Generic Text3 field on Extra Info2 tab
- *Edit File Supplemental Info Tab2 Text4: edit Generic Text4 field on Extra Info2 tab
- *Edit File Supplemental Info Tab2 Text5: edit Generic Text5 field on Extra Info2 tab
- *Edit File Supplemental Info Tab2 Text6: edit Generic Text6 field on Extra Info2 tab
- *Edit File Viewable Via Web Flag: edit Viewable Via Web Flag on Details tab
- *Edit Legislative File Attachments: edit attachments on file
- *Edit Legislative File Controlling Body: edit Controlling Body on file
- *Edit Legislative File Final Action Date: edit Final Action date field
- *Edit Legislative File History: edit history lines on Minutes History tab (ad-hoc)
- *Edit Legislative File ID: edit File ID
- *Edit Legislative File Indexes: add/remove Indexes on Associations tab
- *Edit Legislative File Sections:**
- *Edit Legislative File Sponsors: add/remove Sponsors on Associations tab
- *Edit Legislative File Status: edit status on file
- *Edit Legislative File Text Files: edit text file on text file tab
- *Edit Legislative File Title: edit title box on file
- *Edit Legislative File Type: edit file type on file
- *Edit Legislative File Version: edit file version on text file tab
- *Edit Legislative Files:**
- *Lock/Unlock Legislative File: lock/unlock files
- *View Confidential File: view files that have been marked confidential on the Details tab
- *View File Assigned for others: if File Ownership is set to YES, then user is able to see files assigned to others
- *View Legislative File Attachments: view only rights to Attachments tab
- *View Legislative File History: view only rights to Minutes History tab
- *View Legislative File Previous Versions: view only rights to previous versions
- *View Legislative File Reports: view only rights to file reports
- *View Legislative File Text Files: view only rights to Text File tab
- *View Legislative Files (draft): view only rights to files with Draft status
- *View Votes on File Form:**
- *Meeting Agendas
- *Add Meeting Agendas: create new meetings
- *Batch Delete Meetings: perform mass delete of meetings (deletes Agenda and Minutes)
- *Change Meeting Body: change meeting body of existing meetings, prior to agenda generation
- *Delete Agenda from Calendar: delete published agenda from Insite
- *Delete Meeting Agendas: delete individual meetings (deletes Agenda and Minutes)

- *Edit Meeting Agenda Status: edit meeting agenda status
- *Edit Meeting Agendas: edit meeting agendas
- *Lock Meetings: lock/unlock meetings
- *View Meeting Agenda Reports: view meeting agenda reports
- *View Meeting Agendas (draft): view meeting agenda in draft status
- *View Meeting Agendas (final): view meeting agenda in final status
- *Meeting Minutes
 - *Add Meeting Minutes: create new minutes
 - *Delete Meetings: delete of individual meetings from minutes module
 - *Delete Minutes from Calendar: delete published minutes from Insite
 - *Edit Meeting Minutes: edit meeting minutes
 - *Edit Meeting Minutes Status: edit meeting minutes status
 - *Finalize Meeting: use the Finalize tool (available after importing)
 - *Index History:
 - *View Meeting Minutes (draft): view meeting minutes in draft status
 - *View Meeting Minutes (final): view meeting minutes in final status
 - *View Meeting Minutes Reports: view meeting minutes reports
- *Reports
 - *Run Agenda Packet: create agenda packet
 - *View Agenda Hearing Notice Report: view Agenda Hearing Notice report in Agenda module
 - *View Approval Status Report: view Approval Status report from Home Screen
 - *View Certified Copy Report: view Certified Copy report in Files module
 - *View File Summary Report: view File Summary report in Home Screen
 - *View Files Introduced Report: view Files Introduced report in Home Screen
 - *View General Certification Report: view General Certification report in Home Screen
 - *View Generic Files Summary Report: view Generic Files Summary report in
 - *View Hearing Notices Report: view Hearing Notices report in Home Screen
 - *View Legislative Master Report: view Legislative Master report in Files module
 - *View Mailing Labels Report: view Mailing Labels report in Admin
 - *View Meeting Agenda 1 Report: view Meeting Agenda 1 report in Agenda module
 - *View Meeting Agenda 2 Report: view Meeting Agenda 2 report in Agenda module
 - *View Meeting Agenda 3 Report: view Meeting Agenda 3 report in Agenda module
 - *View Meeting Agenda 4 Report: view Meeting Agenda 4 report in Agenda module
 - *View Meeting Attendance Report: view Meeting Attendance report in Home Screen
 - *View Meeting Calendar Report: view Meeting Calendar report in Home Screen
 - *View Meeting Minutes 1 Report: view Meeting Minutes 1 report in Minutes module
 - *View Meeting Minutes 2 Report: view Meeting Minutes 2 report in Minutes module
 - *View Meeting Minutes 3 Report: view Meeting Minutes 3 report in Minutes module
 - *View Meeting Referral Notice Report: view Meeting Referral Notice report in
 - *View Pending Items List Report: view Pending Items List report in Home Screen
 - *View Referral List Report: view Referral List report in Home Screen
 - *View Signature Report: view Signature report in Files module
 - *View Subject Matter Index Report: view Subject Matter Index report in Home Screen
 - *View Text File Report: view Text File report in Files module
 - *View Upcoming Agenda Items Report: view Upcoming Agenda Items report in Home Screen
 - *View Voting Record Report: view Voting Record report in Home Screen
- *View Approvals
 - *Add New Approver: add a new line for an approver

- *Approval Sequence Admin: approve for other approvers
- *Cancel Sequence: cancel sequence
- *Change Approver: change an existing approver line to a different approver
- *Change Sequence Order: change the order of the sequence
- *Delegate Approvers: delegate current/active line to a different approver
- *Delete Approver: delete any future approvers
- *Edit Due Days: edit days the approver has before escalation
- *Extend Due Days: extend the amount of time the current approver has before escalation
- *Initiate Approval Sequence: start a sequence
- *Pause/Restart Sequence: pause and restart sequence
- *Save Personal Sequence: save sequence to preset sequences
- *Media Integration
 - *Edit Media:
 - *Export Agenda: export Agenda to Media Manager
 - *Import Minutes: import Minutes from Media Manager
- *OLAS
 - *Administer OLAS:
- *Insite (backwards logic)
 - *Restrict Department Attachments: prevent user from adding attachments to Departments
 - *Restrict Meeting Attachments: prevent user from adding attachments to Meetings
 - *Restrict Person Attachments: prevent user from adding attachments to Person
 - *Restrict Personal Addresses: prevent user from changing/adding addresses to Person

System Security>User Accounts

Logon Name	User Name	Security Group	Active	Last Password Chg
CGentry	Christian Gentry	Approvers	Yes	
EMcCormick	Emmit McCormick	Department Drafter	Yes	
KWebber	Kelli Webber	System Administrators	Yes	
LBenner	Leah Benner	System Administrators	Yes	
LShaw	Lucy Shaw	Approvers	Yes	
PChay	Peter Chay	Department Drafter	Yes	
RWeems	Robben Weems	Agenda & Minutes Creators	Yes	
SShort	Sam Short	Department Drafter	Yes	
SErickson	Sydney Erickson	Approvers	Yes	
TKozik	Travis Kozik	Agenda & Minutes Creators	Yes	
WMartin	Wesley Martin	Agenda & Minutes Creators	Yes	

*User Name: display name from People record

*Security Group: user can only be in ONE group. Add new groups with the Blue Plus (assign permissions in System Security>Security Features)

*Logon Name: name to log in with

*Set Password/Confirm Password: default password is password. Change these fields to reset passwords

*Login Limit: how many instances a user can be logged in to at once (**THIS IS NOT HOW MANY TIMES THE USER CAN INCORRECTLY TYPE THEIR PASSWORD**)

System Settings (bolded settings are global)>General

*Additional Home Screen Help Menu Item Text:

*Additional Home Screen Help Menu Item URL:

*Always Show Export Data Options:

*Auto Save: save changes without using “save” button

*Export Legislation Text Report to Media Manager: exports Legislation Text report to Media Manager

*Auto-Sync to Media Manager:

*Build Action Text on Import from Media Manager: builds motion text per Admin settings for votes

*Calendar Display: if Yes, the file will take the current date/time for new files created. If No, the file will take Jan 01.0001 as the default date

*Default Email Address: this field is used when the destination is set to “email” when running a report. This is the TO email

*Default Email Body Text: this field is used when the destination is set to “email” when running a report. This is the text that is populated in the email

*Display Format:

*Export Agenda with Meeting Comment: exports the meeting comment/note to Media Manager

*Export Agenda with Meeting Date: shows meeting date in the event created in Media Manager

*Export All Attachments:

*Export Attachments to Media Manager: if Yes, the attachments will show in Media Manager. If No, the attachments will not show in Media Manager

*Limit Add Many File List: if Yes, the available files will populate only with items where Agenda Date = Meeting Date. If No, the available files will populate with all available files

*Live Manager or Meeting Manager: LM = Live Manager, MM = Meeting Manager

*LiveManager URL: URL used to reach Live Manager. Default is

<http://{{0}}:{{1}}/livemanager/LiveManager.application?meetingserverip={{0}}&webserviceport={{1}}>

*Mark Consent Items Upon Agenda Generations: marks which items are consent

*Print Attachment with Agenda and Minutes: if Yes, the “Print Attachment” box on the Attachments tab in the file is automatically checked. If No, the box is not automatically checked

*Prompt for Agenda Date on Action Taken:

*Protect Agenda: prevents users from making changes to the Agenda after the Minutes have been edited

*Recent Files Limit: sets the number of recent files to display on the Home Screen

*Restrict Agenda Date Selection: allows users to set agenda dates on files ONLY with dates that have meetings created

*Search Results Threshold: if a search returns more than this number, it will provide a list. If a search returns less than this number, it will open the first return and the user will need to navigate to the list

*Show Approval Tracking Module: if Yes, the client pays for this module and it shows the Approval Tracking tab on files and in Admin. If No, the client does NOT pay for this module

*Show Association Tab: shows Association tab on files

*Show Attachment Tab: shows Attachment tab on files

*Show Demographics Tab in People: shows Demographics tab in People (in Admin)

*Show Details Tab: shows Details tab on files

*Show File Name Box on LF Form instead of Details tab:

*Show History Tab: shows Minutes History tab on files

*Show Info1 Tab: shows Info1 tab on files

*Show Info2 Tab: shows Info2 tab on files

*Show Mover Seconder for Consent: shows mover/seconder on consent votes

- *Use Lockout Policy: locks users out after 3 failed login attempts
- *Use Login Limit Feature: allows users to log in to multiple instances of Legistar (# of instances set on User record)
- *Use Meeting Status For Publishing Files to Insite:
- *Use Microsoft Word for Text Editor: switches the text editor to open in Word
- *Use Recommended Action as Action Text: pulls the recommended action into the motion text field
- *Use Word Templates for Legistar Templates: allows users to upload .dotx files into Admin (Legislative Files>Text File Templates)
- *Work Style:
- *Word Reports URL:
- *Always Auto Sync Regardless of Meeting Status: auto syncs all meetings to Insite
- *Show Doc Review Markup in Converted PDF Files: shows “track changes”
- *Show Indexes on Meeting Reports: if Yes, Indexes are printed on Agendas and Minutes report (if RPT accommodates them). If No, Indexes are not printed on Agendas and Minutes
- *Collation Page Number Location: where the page number shows on the report
- *Add Report as Attachment Enabled: on files report screen, this shows the “add report as attachment” check box
- *Add Report as Attachment Name: when “add report as attachment” is checked, this is the name of the attachment
- *Sync Title with Agenda Description: this syncs the file title with the description field on the agenda
- *Laserfiche Append All Files: if Yes, it exports all files (agenda, coversheets, attachments) as one file to the Laserfiche system
- *Show Text Sections on Meeting Reports: shows the text sections on the agenda/minutes reports
- *Laserfiche Append Attachments: exports coversheets and attachments as one file to the Laserfiche system
- *Laserfiche Archive Files as TIF: if Yes, this setting forces all files to be sent to Laserfiche as TIF files
- *Export Report to Media Manager: this setting chooses which file report is sent to Media Manager on export
- *Save RPT Report in Temp Directory:
- *Export Tree Formatted Data to Media Manager: if Yes, the agenda will be exported with sub-items. If No, the agenda will be exported all at one level
- *Use SAML 2.0 Authentication: this setting turns on SAML integration
- *SAML Endpoint URL:
- *Use Active Directory Authentication:
- *LDAP Server Address:
- *Active Directory FQDN (Fully-Qualified Domain Name):

System Settings (bolded settings are global)>Legislative Files

- *Add Contact Email on Add New File: if Yes, adds the email of the contact person to the Details tab of the file
- *Allow View Attachment Via Web Default: if Yes, attachments are visible on web by default (when the file becomes public)
- *Approval Tracking Tab Caption: name of the Approval Tracking tab in a file
- *Assign File ID as: chooses permanent or temporary file ID scheme (or none at all)
- *Associations Tab Caption: name of the Associations tab in a file
- *Attachments Tab Caption: name of the Attachments tab in a file
- ***Default Body Sponsor:**
- *Default Department: this auto-populates the department drop down with this value
- *Default File Controlling Body: this auto-populates the controlling body with this value
- *Default File Status: this auto-populates the file status with this value
- *Default File Type: this auto-populates the file type with this value
- *Default File Version: this auto-populates the file version field with this value
- ***Default Name Sponsor:**
- *Details Tab Caption: name of the Details tab in a file
- *File ID Generation: Manual File ID (user will need to click the ID button next to the File ID field to assign a file ID), Automatic Permanent/Temporary File ID (file ID is auto-populated when the file is created)
- ***File Versioning:**
- *File's Draft Status: specifies what status is considered "draft"
- *History Tab Caption: name of the Minutes History tab in a file
- *Info1 Tab Caption: name of the Info1 tab in a file
- *Info2 Tab Caption: name of the Info2 tab in a file
- *Laserfiche Enabled: turns on/off Laserfiche
- *Laserfiche Repository Name:
- *Laserfiche Web Service URL:
- *Legislative File Sort Type: this is the sort of files returned by a search. The File Number (Ascending Order)- starts with the lowest file ID and goes up. The File Number (Descending Order)- starts with the highest file ID and goes down. The Order in Which They Were Entered (Ascending Order)-starts with the oldest file and goes to newest. The Order in Which They Were Entered (Descending Order)-starts with the newest file and goes to oldest.
- *Legislative Files Tab Order- sorts the tabs on a file
- *Mark Sponsors: puts a mark next to sponsor name
- *Matter Not Viewable Via Web Default: this sets the default "Not viewable via web" check box on the Details tab on a file for new files
- *Primary Sponsor Mark: the symbol that is shown next to the primary sponsor name
- *Print Attachments with Reports Default: this sets the default for the "Print Attachment with Report" checkbox on the Attachments tab in a file
- *Recommended Action Section Name: identifies the Recommended Action Section in the Text File
- *Secondary Sponsor Mark: the symbol that is shown next to the secondary sponsor name
- ***Show Title/Name in File Display: chooses either the title box or the file name to show on the ...?**
- *Temporary File Key: identifies the auto-numbering scheme for the temporary ID
- *Text Editor- Default Font: which font is set by default in the Legistar text editor
- *Text Editor- Default Font Size: which font size is set by default in the Legistar text editor
- *Text File Tab Caption: name of the Text file tab in a file
- *Undefined File Type ID: the file type that is used when a new file is created on import

- *Use Due Date for Next Agenda Date: this setting is used to update Agenda Date with the Due Date
- *Use File Assigned: This setting is used to assign a File to a user. 'None' - cannot do or see File assignments. 'Low' (unrestricted permissions) - can assign people to File, remove from assignment or delegate file ownership of the file. 'Medium' (partially restricted permissions) - can assign people to a File, or remove the assignment, or delegate file ownership of the file ONLY if user is an owner of the File, or is in the list of the people already assigned for this File. 'High' (restricted permissions) - can assign people to a File, remove the assignment, or delegate file ownership of the file ONLY if user is an owner of the file. For 'Low', 'Medium' or 'High' values the File Assignments menu on Legislative files will be enabled.
- *Use Next Meeting Date: uses next meeting date for the agenda date
- *Use Next Meeting Date for File Intro Date:
- *Use Today's Date for New File Intro Date: auto-populates "Date Created" field on a new file with today's date
- *Archive Utility Default Report:
- *Archive Utility File Name Format:
- *Archive Utility Mailing List:
- *Disable Legislative Files Browse Button: disables/enables the Browse tool in the Files module
- *Tertiary Sponsor Mark: the symbol that is shown next to the tertiary sponsor name
- *Agiloft Final Matter Status:
- *Show Board Letter Checkbox for Attachments:
- *Action IDs Used to Update Agenda Date:
- *Change Requester on New Sequence: automatically pulls in the user's name to the requester field that starts a new sequence or adds a new approvers
- *Alpha Sort Indexes on Matter Files: sorts Indexes alphabetically on files
- *Show Minute Order Checkbox for Attachments:
- *Insert New Line on Add Template to Legistar Text File:
- *Use Title for Recent Files Display on Home Screen: pulls the title from the title box (not the file name) on Home Screen

System Settings (bolded settings are global)>Agendas

- *Agenda Date History Sign: used for the comparison between the Due Date (Target Date) and the Meeting Date for an agenda
- *Agenda Date Sign: used for the comparison between the Agenda Date and the Meeting Date for an agenda
- *Agenda Draft Status: specifies what status is “draft”
- *Agenda Final Status: the status that automatically removes the checkbox for “Not Viewable Via Insite” on the Details tab of the files on the agenda
- *Agenda Generation Sort By: the order that the files generate on the agenda
- *Agenda Item Number: when auto-numbering an agenda, it will apply A,B,C or 1,2,3 or a,b,c
- *Agenda Numbering – Carry Header Number: adds the header line auto-number to the sub-items below it
- *Agenda Numbering Separator: when the header number is carried below to the sub-item, this separates the header number with the item number (20-1 the “-” is the separator)
- *Agenda Numbering Suffix: suffix to agenda numbers (20. the “.” is the suffix)
- *Agenda Status Not Viewable By the Public: status that prevents an agenda from being published
- *Allow Add Files in Approval Status to Agenda During Generation and Manually: allows files with status of “In Approval” or similar to be added to an agenda
- *Beginning Date Range for Calendar: how many days in the past the calendar shows
- *Default Meeting Body: this auto-populates the meeting body for a new agenda
- *Ending Date Range for Calendar: how many days into the future the calendar shows
- *Final Status: specifies what status is “final”
- *Multiple Referrals On: this setting is part of the client workflow. When a file is referred (sent to) multiple bodies at the same time, the bodies the file is sent to will have to take closing actions to send the file back to the referring body. If a closing action is not taken, the file stays in limbo
- *Primary Legislative Body: determines the primary body
- *Print Attachments Cover Page As: determines which report prints as the cover page
- ***Only Re-Number Agenda Header and Items with Existing Number:**
- *Reset Number on Header Level: resets the sub-item numbers on these header levels (header levels = header style numbers)
- *Secondary Legislative Body: determines the secondary body
- *Show Only Published Meetings on Insite: if Yes, meetings in draft status will not have a placeholder on the Insite Calendar
- *Status of New File on the Fly: this status is applied to files that are created through the agenda (add new line, select Agenda Item, File ID drop down, <Add New>)
- *Cover Bookmark Name Format: when creating a packet, this is the name of the individual file/bookmark
- *Attachment Bookmark Name Format: when creating a packet, this is the name of the individual file attachment/bookmark
- *Agenda Packet Individual Files: shows the Agenda Packet button on the reports screen
- *Show Change Meeting Body on Agenda Screen: shows “Change Meeting Body” in the Tools drop down on the Agenda tab (prior to generation)
- *Agenda Packet Single PDF: turns on the UFC Packet Creator (also need DevOps Setting)

System Settings (bolded settings are global)>Minutes

- *Allow Publishing Draft Meetings and Show Meeting Details on Web: this allows meetings with the minutes status set to draft to be published. Meeting Details will also be available
- *Apply Media Manager Sort Order on Import: when importing, it will be in the Media Manager sort order (which is typically sorted by timestamp)
- *Auto Enactment Date:
- *Auto Enactment Number: if Yes, the enactment number will auto-generate (if the action applies one) and will overwrite any existing number
- *Auto Generate Action Text: if Yes, the action text will auto-populate based off what is set up in Admin for the vote type
- *AVS Web Polling Interval:
- *AVS Yes Vote:
- *Beginning Date Range for Minutes Calendar View: how many days in the past the calendar shows
- *Consent Master Line Header Level: header level applied to the Consent Master Line
- *Consent Text: text of the Consent Master Line
- *Default Absent Value:
- *Default Font for RTF Action Notes: when RTF is turned on for the Action Notes field, this is the default font
- *Default Font Size for RTF Action Notes: when RTF is turned on for the Action Notes field, this is the default font size
- *Default No Value:
- *Default Present Value:
- *Default Yes Value:
- *Do Not Set Final Action Date and Enactment Number on Failed Vote: if vote fails (more no votes than yes votes), there is not a final action date or enactment number applied to the vote
- *Enable RTF in Action Notes: turns on RTF for Action Notes field
- *Enable Video Indexing:
- *Ending Date Range for Minutes Calendar View: how many days into the future the calendar shows
- *Granicus Password:
- *Granicus URL:
- *Granicus Username:
- *Member Type to exclude from Attendance and Votes Listings: does not list this vote/attendance type value on reports
- *Minutes Draft Status: determines what status is "draft"
- *Minutes Final Status: determines what status is "final"
- *Show Finalize Meeting Option: shows/hides the finalize option in the Tools drop down. When a meeting is imported, finalizing the minutes applies the actions to the files
- *Treat None Vote As:
- *Treat Tie Vote As: if the vote ties (6 yes, 6 no), then the vote uses this value
- *Use Google Video:
- *Use Granicus: if Yes, the client uses the Media Manager integrations and Media IDs are imported with corresponding archive ID in the Media ID field in the Minutes module. The Media fields can be modified, if required. The Index field is grayed out and cannot be edited. If No, the client is doing manual minutes. Media and Index fields can be manually entered.
- *Use Vote Weight: allows members to have a specified vote weight on their Member record
- *Voice Vote Options:
- *Import Private Notes from Live Manager: imports notes set to private

System Settings (bolded settings are global)>Vote Actions

*Ad Hoc Vote Weight:

*Attendance Vote Action:

*Consent Vote Action:

*Delete Original Roll Call Members: allows user to delete roll call members populated by office member records

*Place Consent Line Top: puts the Consent Master Line at the top or bottom of the items

System Settings (bolded settings are global)>File Locations

*Agenda Packet Directory: file path when the agenda packet is created

*Export Folder:

*Import Folder:

*Legislative Files Packet Directory: file path when the file packet is created

*Text File Import Directory:

*Archive Directory:

*RPT Files Location: repository for RPT files used to run reports

System Settings (bolded settings are global)>Approval Tracking

- *Email Template: For Your Information: selects the template that sends out the informational email to inform an approver that a file has been submitted for approval, but no action is required.
- *Email Template: Disapproval Notice to Sequence Members: selects the template for the email that is sent when a file is disapproved by any approver in the sequence. It is sent to all approvers who previously approved the file. to approvers on the sequence when it has been disapproved
- *Email Template: Alternate Approver Not Defined: selects the template for the email is sent when the system attempts to escalate to an alternate approver, but an alternate is not specified.
- *Email Template: Summary: selects the template for the email that is sent on a daily basis to the approver summarizing the current status of the files they own.
- *Email Template: Delegation Notification: selects the template for the email that is sent when a file is delegated to a different approver. The new approver now has to take action on that file on behalf of the original approver.
- *Email Template: Extend Due Date: selects the template for the email that is sent to the approver when the due date of a file is extended.
- *Email Template: Text File Change in ATS: selects the template for the email that is sent when the text file is changed during the approval process. This applies to the Legistar Text Editor and Word modes.
- *Email Template: Reminder Notice: selects the template for the email that is sent when an approver has not taken an action on a file within the given time frame.
- *Email Template: Sequence Restarted: selects the template for the email that is sent when a sequence is restarted during the approval process. Sent to the Requester.
- *Email Template: Sequence Paused: selects the template for the email that is sent when a sequence is paused during the approval process. Sent to the Requester.
- *Email Template: Individual Review Request: selects the template for the email that is sent to the next approver in the sequence when a requester initiates a sequence or an approver takes action on the file.
- *Email Template: Alternate Approver Has Not Responded: selects the template for the email that is sent to the requester when an escalated approver has not taken an action on a file within the given time frame.
- *Email Template: Alternate Approver is Out of Office: selects the template for the email that is sent to the requester when escalation fails due to Alternate Approver being out of office and also his/her Out Of Office Alternate Approver is also out of office.
- *Email Template: Canceled due to Inaction: selects the template for the email that is sent when a sequence is canceled due to inaction.
- *Email Template: Sequence Approved: selects the template for the email that is sent to the requester when an initiated sequence has been approved by all approvers.
- *Email Template: Disapproval Notice to Approvers: selects the template for the email that is sent to the requester when a file is disapproved by any approver.
- *Email Template: Sequence Canceled: selects the template for the email that is sent to all approvers in the sequence (including FYI approvers), when a sequence is canceled.
- *Email Template: Escalation: selects the template for the email that is sent to the approver when a file is escalated to them.
- *Default Email From Address: address that the emails are sent from when "Send ATS Emails From Default Address" is set to Yes
- *Display all Versions of File:
- *Edit Matter Extra Fields:
- *Edit Matter Fields:
- *File Status on FYI: when a file in approval process is FYI, the file status changes to the selected status

- *File Status on Canceled: when a sequence has been canceled, the status of the file changes to this value
- *File Status on Initiated Approval Process: when a sequence has been started, the status of the file changes to this value
- *File Status on Paused: when a sequence has been paused, the status of the file changes to this value
- *File Status on Approved: when a sequence has been approved (the last approval), the status of the file changes to this value
- *File Status on Disapproved: when a sequence has been disapproved, the status of the file changes to this value
- *Approval Due Days: when first adding a new approver, this is the default number of days the person has to approve the file. It is also used when delegating. The person delegated to will have this number of days to approve
- *Escalated Due Days: when a file is escalated, this setting determines the number of days the new approver will have to respond to the file
- *Approvals Due Date Extension: when an approver has extended the number of days for taking any action on a file then the number of extended due dates will add to the Escalated date
- *Lock File on Final Approval: if Yes, the file will automatically lock on the final approval
- *Reviewer not FYI:
- *Send Email on Text File Change when in ATS: if Yes, the selected template will send to the Requester
- *SMTP Server Address: smtp.granicus.com
- *Send ATS Emails From Default Address: if Yes, ATS emails will be sent with the default from address. If No, ATS emails will spoof the Requester's email address
- *SMTP Port: default = 25
- *Use SSL for SMTP:
- *SMTP Timeout:
- *Route Email to Pickup Directory on the Server: if Yes to route emails to pickup folder called 'LegistarATSEmail' on the server (can be found under the Legistar Services installation path; or, if Services were installed under the root of IIS, you can find 'LegistarATSEmail' directory under the drive letter of the Services installation). Set to No to send emails.
- *Default Action Type: the Action Type you select here will be used as the default when a requester adds a new approver to an ATS sequence. The type can then be modified using the Action Type drop-down menu in the Manage Approver tab
- *Allow Requestor to Edit File During Approval Process: if Yes, the Requester can make edits to the file while the sequence is started
- *Allow to Start ATS Sequence With FYIs Only: if Yes, the sequence can consist of only FYIs
- *ATS Automation Time: the time the files escalate (and emails are sent)

System Settings (bolded settings are global)>DevOps

*Attachment Converter: GranicusFileConverter-legacy converter, UFC-new converter

*Callback URL: UFC Callback URL

*File Packet Temp Folder – Server Side: destination of the file packet temp folder on the server

*Show File Packet Single File Destination for LF Reports:

*UFC Client ID: client ID that shows on UFC

*Prevent ATS Mail: turns off all emails for ATS

*Agiloft User Name:

*Agiloft Password:

*Agiloft Knowledge Base Name:

*Agiloft Integration Enabled:

*Agiloft Host Name:

Label Settings

*System Default Label: default label

*User Defined Label: user defined label

*Field Status: Active- in use. Disabled- grayed out. Invisible- not shown in the UI.

*Tab Stop:

*Help Text: blurb of text shown when hovering over the field

*Required: if checked, does not let the user navigate away until the field is filled in

Approval Tracking>Approval Master>Approval Sequence tab

*Approval Sequence: name of the sequence

*Sequence Owner: can be a department name or User – if it is a department, only those who don't have a department listed on their People record and those who are in the department will be able to see the sequence

*File Type: the sequence will be available for use with this file type only. Leave blank if all file types can use this sequence. This field is a limiting factor after the department/Sequence Owner field

*Approved File Status: after the final approval, the file changes to this status

Approval Tracking>Approval Master>Approval Members tab

*This tab is where the sequence is created. Select approver, email template, due days and action type (FYI or Approver)

Security Log

Legistar - Security Log

Site Information
Government Bodies
People
Legislative Files
Work Flow Control
Report Design
Votes and Attendance Settings
System Security
System Settings
Label Settings
Approval Tracking
Security Log
Exit

New | Tools | Save | Delete | Help

Date Range From 3/1/2018 To 6/18/2018 Go

Total records found : 36
Displaying the first : 20
Add the Next 20 Records

Table [TBLPERSONALSETTINGS] with PK = 644, [PSSETTINGNAME] = RECENT FILES - AGENDA and [PSAREA] = AGENDA has been changed. Column - [PSSETTINGVALUE] Old value is [894|896|897|899] New Value is [894|896|897|899|900]

DateTime	Details	User
6/15/2018 12:24:04 PM	Table [TBLPERSONALSETTINGS] with PK = 644, [PSSETTINGNAME] = REC	daystar
6/15/2018 08:21:19 AM	Table [TBLCLIENTREGISTRY] with PK = 3221, [CRKEYNAME] = SHOW CHAI	daystar
6/5/2018 02:04:44 PM	Table [TBLPERSONALSETTINGS] with PK = 643, [PSSETTINGNAME] = RE	daystar
6/5/2018 09:28:31 AM	Table [TBLPERSONALSETTINGS] with PK = 645, [PSSETTINGNAME] = RECI	daystar
6/5/2018 09:28:30 AM	Table [TBLPERSONALSETTINGS] with PK = 643, [PSSETTINGNAME] = RE	daystar
6/4/2018 10:38:52 AM	Table [TBLPERSONALSETTINGS] with PK = 644, [PSSETTINGNAME] = RECI	daystar
6/4/2018 10:38:52 AM	Table [TBLPERSONALSETTINGS] with PK = 643, [PSSETTINGNAME] = RE	daystar
5/17/2018 12:07:59 PM	Table [TBLPERSONALSETTINGS] with PK = 643, [PSSETTINGNAME] = RE	daystar
5/4/2018 09:59:04 PM	Table [TBLCLIENTREGISTRY] with PK = 3314, [CRKEYNAME] = Disable Le	deleted user
5/4/2018 09:59:04 PM	Table [TBLCLIENTREGISTRY] with PK = 3313, [CRKEYNAME] = Collation P	deleted user
5/2/2018 03:56:14 PM	Table [TBLPERSONALSETTINGS] with PK = 643, [PSSETTINGNAME] = RE	daystar
5/2/2018 10:32:18 AM	Table [TBLPERSONALSETTINGS] with PK = 645, [PSSETTINGNAME] = RECI	daystar
5/2/2018 10:32:18 AM	Table [TBLPERSONALSETTINGS] with PK = 644, [PSSETTINGNAME] = RECI	daystar
5/2/2018 10:32:18 AM	Table [TBLPERSONALSETTINGS] with PK = 643, [PSSETTINGNAME] = RE	daystar
5/2/2018 09:48:35 AM	Table [TBLAGENDADEFINITION] with PK value 160 has been changed as	daystar
5/2/2018 09:34:25 AM	Table [TBLOFFICERECORD] with PK value 577 has been deleted.	daystar
5/2/2018 09:34:21 AM	Table [TBLOFFICERECORD] with PK value 582 has been changed as follo	daystar
5/2/2018 09:34:16 AM	Table [TBLOFFICERECORD] with PK value 583 has been changed as follo	daystar
5/2/2018 09:33:05 AM	Table [TBLBODYRECORD] with PK value 21 has been deleted.	daystar
5/2/2018 09:32:20 AM	Table [TBLBODYRECORD] with PK value 21 has been changed as follows	daystar

1 Of 20

*Date Range: the dates you would like to search. Be weary of doing more than 2-3 weeks at a time in a client DB, it will take a long time. Click GO to search the range

*Total Records Found: this is the total security log entries found in the date range search.

*Displaying the First: how many records are displayed

*Add the Next 20 Records: adds more records to the display