Daystar Computer Systems, Inc.

Legistar 5.0 Manual

Guide to Legistar 5.0

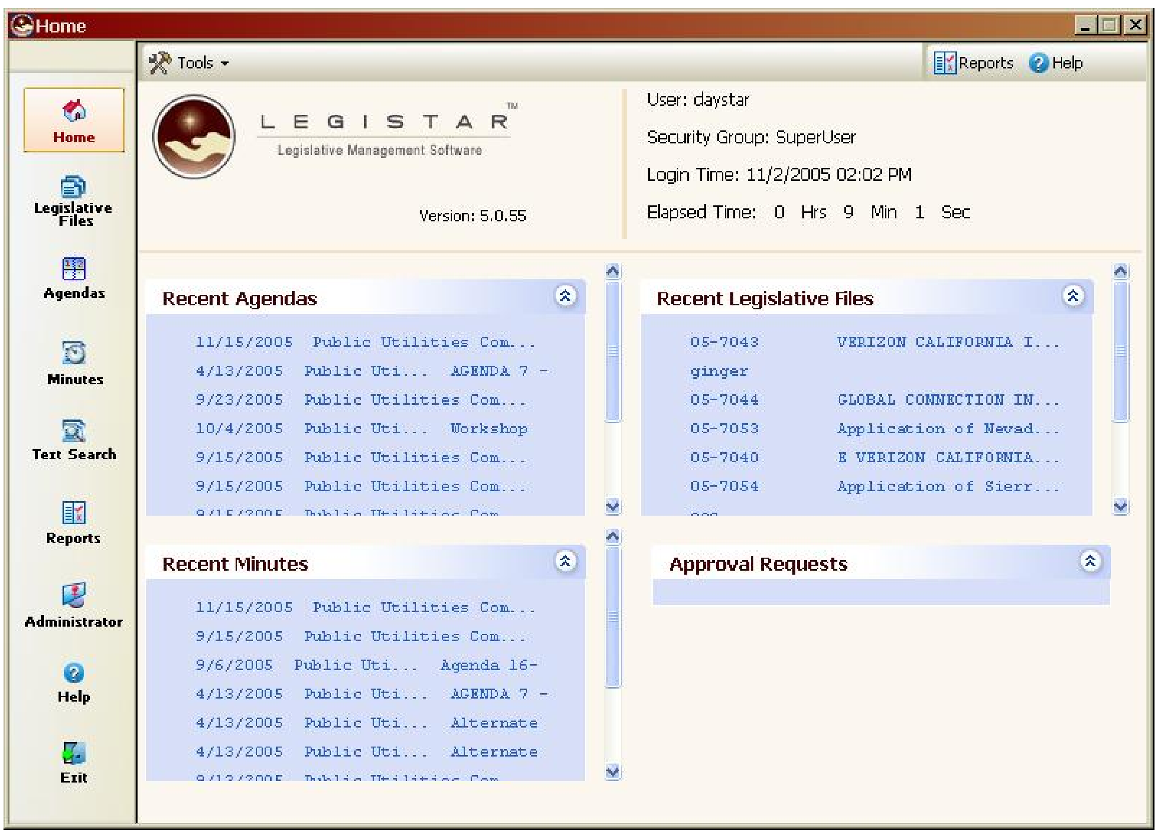
LEGISTAR™

Legislative Management Software

What is Legistar?

Legistar is proprietary software that organizes and tracks Legislative Files. As Legislative Files are created and travel through the legislative process, Legistar maintains the file integrity as it captures specific file information and attributes used in creating agendas and minutes. Legistar capability also includes a full text search feature using both simple and boolean search methods; a referral tracking system for Legislative File referrals and reports functions with a wide range of structure and output options.

This manual describes the generic functionality of Legistar. However, since Legistar is so flexible in different client installations, some descriptions may not apply to the way you use Legistar.



Main Menu

The main menu above displays the most recent agendas, legislative files and minutes that you have accessed. The left side holds buttons to the major sections of the program, which are described in this manual.

Legistar Functionality

Field Types

Calendar Boxes

The calendar box simplifies entry in the date field and allows you to quickly know the date for the first or third Thursday. When using the calendar box, Legistar provides a monthly calendar format. Click the desired date to insert in the date field. The selected date will appear in various colors to symbolize the past, present and future. The date within the red circle is the current date.

Drop Down Boxes

Click the down arrow to view available options in a drop-down box. Information fields marked by the down arrow will only accept predefined entries. The choices in these lists reflect options chosen based on information entered in administration.

Adding choices

Some Legistar fields can be edited on-screen. Security restrictions determine which users may edit these fields. If a field label appears white when the cursor moves across it, which means that you can add values you want to appear in the list. Double click on the name and add new values in the screen that comes up.

List-to-List Boxes

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

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

When searching in a list-to-list box you can only search on items that have been previously used.

RTF Zoom boxes

RTF Zoom boxes work the same as the plain text zoom boxes; with one exception they allow you to add RTF formatting to the text. This includes the following: bold, Italic, and underlined fonts. As well as, different font sizes or colors. You can identify if the zoom box is RTF by the button you click to open it. If it has a magnifying glass with the letter 'A' in it then it will be RTF, if it has a '+' in it then it is plain text.

Zoom Boxes

Some Legistar fields are expandable and allow users to enter and read expanded text in a zoom box.

There are two types of zoom boxes in Legistar 5. RTF (Rich Text Formatting) zoom boxes and Plain Text zoom boxes. The RTF boxes allow you to put in bolding, strike through, underlines and other text formatting that will print on the report. The plain text boxes do not allow text formatting.

The RTF ones will have buttons to bold and underline while the plain text will not support such formatting options. You can tell the difference before opening the box by looking at the zoom box button. If it has an 'A' on it then it supports RTF, if it has a '+' on it then it is a plain text box.

Getting Started

Screen Layout

Throughout the application, Legistar screens are notably similar utilizing many of the same buttons. These buttons perform the same functions throughout Legistar. When a button appears dim, it is disabled and cannot be used.

Listed below are operation button names and corresponding functions:

- **Save - saves any changes you've made since you entered that screen**
- **Search - searches Legistar database when in search mode**
- **New - creates new file in the Legistar database**
- **Clear - Removes all screen information and returns the user to search mode**
- **Edit - text editing tools such as cut, copy, and paste**
- **Tools - variety of different options depending on the screen and government**
- **Browse - look through all the files/meetings or the most recent ones you accessed**
- **Reports - Select a report to run which pertains to either the current legislative file or matter**
- **Help - brings you to this help file**

Local Settings

Local Settings & Password Changes

The local settings and password settings are just for a specific user. These allow the user to have more control in determining how the program should be set up for them to use it efficiently.

Legislative Files

Allows you to set up the default setting when you click on "New." You can select your default file type, status and the in control. These should be set to your most common choice to eliminating extra clicking. For example, if I work for the Finance Committee and always create resolutions then I would make my default file type "resolution" and the in control "Finances Committee."

Agendas

This default controls the agendas viewed on the calendar when opened by the user. Beginning date rage is number of days in the past from today's date typically client's use 30 days. Ending date range is number of days in the future from today's date typically client's use 30 days.

General

The Search Results Threshold shows how many results will the program return when performing a search before it asks if you are sure you want to receive all the results.

Recent Files Limit controls how many files will be listed as recently visited on the home screen of Legistar for files, agendas and minutes.

The Auto Save has two choices yes and no. When the setting is set to yes all files and records will automatically save, if set to no you will be prompted to save.

Show Approval Tracking Module if set to yes you can access the approval tracking module. If no you cannot access the approval tracking module.

Calendar Display If the setting is set to "yes" when the calendar is opened it will display the records according to your date range view. When set to "no" the calendar will not display any records.

File Locations

Import Directory is the default directory for importing a document.

Color Settings

Allows you to specify your color settings for different dates and the focus color. The field focus color controls the color or the field when you are in it. The Grid Row Selection color show when a row is selected on the agenda or minutes, calendar, etc. The other color selections are for dates: current, future and past.

Password

This allows you to change your password. If you have forgotten your password your system administrator can reset it for you.

Searching for Files

Finding the file you need in Legistar is very easy. When you open the Legislative File screen you are automatically in search mode and at any time you can press clear and you will return to search mode.

While in search mode you enter the criteria, then CLICK search and Legistar will retrieve all the matching data. For example, if you want all the resolutions that were passed at the last meeting you would select the file type resolution, the status of passed and the final action date of the meeting. When you press search and all matching files will be displayed.

You can also enter key words into the text file screen if you want to find all the files that are specific to a certain subject or key word.

Dates ranges can also be used. For example if you wanted to see all the files that have been introduced since the start of 2004 then you would put >1/1/2004. And that would pull all records that have an introduced date greater then January 1st, 2004.

Browse

Located on the top row of header buttons the browse button will display a condensed list of files by the introduced dates that you enter for you search. In addition, the arrow on the browse button will display the last ten files viewed.

Go To

Located on the bottom right - the hand by the arrow keys lists the results of your search in a condensed display. The arrows let you maneuver through the files retrieved from the search.

New

The New button allows the user to add a new record. When you click on new default data will automatically be entered based on the users indications, then the user will have to complete the file by entering all of the required information. After adding the information, make sure to save your work by pushing the save button at the top. To immediately view click refresh or to update the tree listing, right click and select refresh.

Save

Saving needs to be done when changes are made in Administration. Most of the time if changes have been made the program will ask if it should save the changes. However, it is good practice for users to save early and often.

Legislative Files

Legislative Files Overview

The term Legislative File refers to the type of matter. Typical file types are: Resolutions, Ordinances and Presentations. In the Legislative File section you will find all the specific detail of a Legislative File, this includes the title, body, attachments, sponsors, etc.

The workflow process begins with creating a Legislative file and all other sections of the program automatically integrate, update and build the file's history as it travels through your workflow process.

The first step in creating a Legislative File is to add text, attachments and any other pertinent data into the appropriate fields. When the file is in perfect order and all processing is finished, it begins its journey through your workflow process. Depending on file type and other various requirements this could include going to various approvals, department or committee agendas where their action is recorded during the minutes, both which build the file's history automatically.

After the final action the Legislative File remains in the database as an historical record for searching purposes.

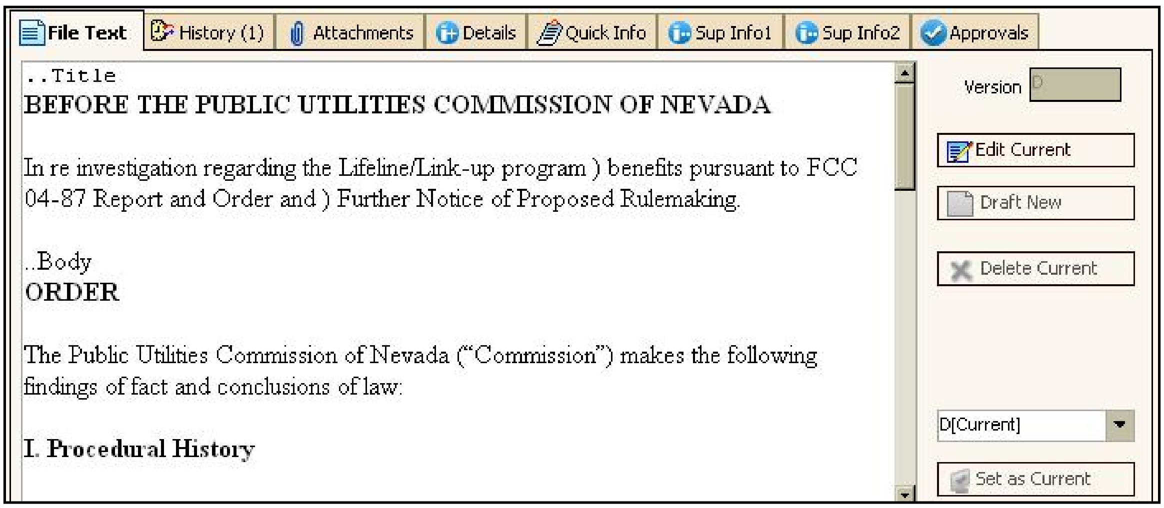
The Legislative File has the following main tabs:

- **File Text**
- **History**

- **Attachments**
- **Quick Info**
- **Details**
- **Sup Info 1 & 2**

File Text

The body (..body) typically contains all the complete verbiage (whereas text found on Ordinances and/or Resolutions) which is used to produce more formal reports such as the Certified Copy, Signature reports.



The File Text can be stored in Microsoft Word as a .doc or directly in Legistar the File Text editor box as a .txt. The difference in the two editors is that Microsoft Word can allow for formatting and complex tables, where the text editor will not allow that type of formatting.

The text of a Legislative File can be entered three ways:

1. typed directly into either the Microsoft Word document or Legistar editor box

2. imported from a network directory or disk

3. copy and paste, however this can cause unknown formatting mishaps from the hidden characters which are pasted into Legistar with the text.

Tips:
Make sure that the dot dots are in front of the text section key word. Such as: ..title and ..body. The dot dots are used in the Legistar system as separators in telling the system, which report, is to have certain text. If your installation

has special requirements a new file section can be added to place text on a certain report. For example, if your agenda report prints a fiscal note, we can set up your system to use the ..fiscal on the agenda only - and not on the minutes report.

Working with Multiple Versions

Creating a New Version

To create a new version click on the button "create new" then the new editor or Microsoft word will open allowing you to edit the text for the new version.

Changing the Version

To change the version select the version that you would like to mark as the current version and then click on the button "mark current." Legistar always uses the current version for all reports.

Text File Templates

When drafting File Text in Legistar, text file templates allow users to select templates for each File type. If you are using a template now it can be placed in Legistar for you to select directly from the "Legistar Toolbar" when in Microsoft Word or from the toolbar menu if using the File Text Editor box.

Templates are valuable to avoid having to type redundant text in the file, as well as for providing consistency throughout your entire organization.

In addition, each section of a template is available from the "File Sections" menu option on either your "Legistar Toolbar" or you File Text Editor box.

Working with File Sections

The File Sections are frequently used sections of text that are either inserted as needed within the Text Editor or you can build and store within Legistar templates. Each Legislative file has two file sections, which are used to put text on certain reports. The first is a ..title, which is the text that displays on the Agenda and Minutes (and most of the other reports). The second section is the ..body which is typically used for the "Whereas verbiage" and combined with the ..title it creates the more formal report such as the Certified Copy and Signature Reports.

You may have special requirements regarding what detailed information shows on your reports, which are distributed to the public. The project team will make certain decisions on how to handle these requirements and you may have a special section that is not referenced in this generic Help File. If so, you should have some written documentation which was provided to your project team, that will describe any thing different that is available to you or it could have been added later by your System Administrator in which you should have received some instructions on how and when to use this section.

How to Add File Text

When you click on "New" in the Legislative Files screen you are automatically on your original version of the File Text. Each client has unique ways of tracking versions; therefore controls in Administration allow flexibility in the numbering conventions used in your installation. Typically, the original version is zero or one.

At this point the File Text box is empty to begin click on "Edit Current" if you are using MS Word it will open or if you are using the editor within Legistar the File Text Editor will open for you to begin your file. You can use the below options to enter file text.

How to Delete File Text

Select the desired version to be deleted and click on the button that says, "Delete Text."

Copy and Pasting File Text

You can select text and copy it directly into the File Text in Microsoft Word in directly in the File Text editor. This in not the desired method as copying text places all variables in the text and the appearance can be distorted during the paste function.

It is recommended that the text is either entered into Legistar directly or imported.

Standard Paragraphs

Standard paragraph allows you to store commonly used sentences and paragraphs in one location. Then you can copy the text to the clipboard and paste it into an area of Legistar.

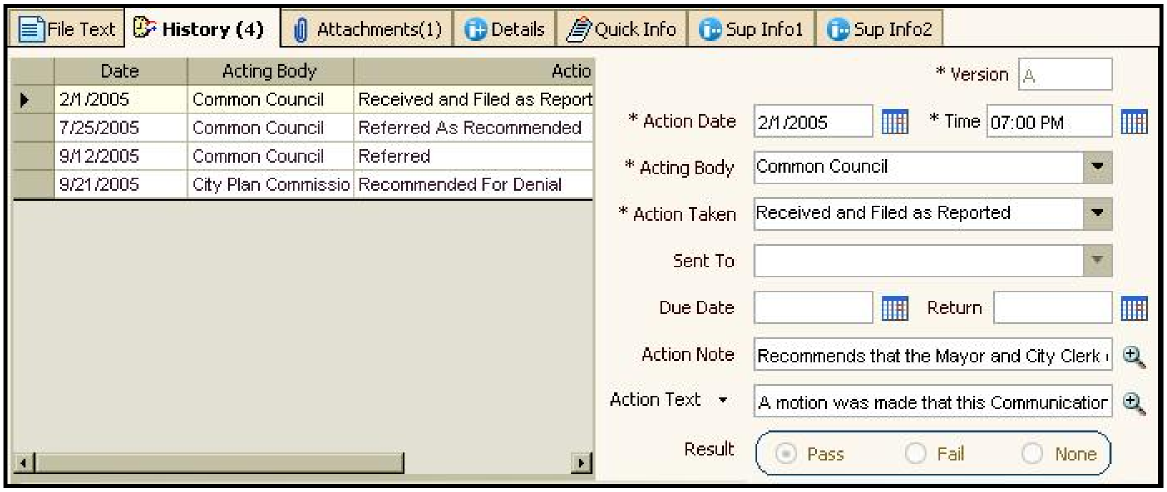
Importing File Text

When you click on "New" to create a new Legislative file the system knows that you have to enter text for the file. Therefore, at the time that you are ready to starting entering text you click on "Edit Current."

If you are using Microsoft Word it will automatically open and from the Legistar Toolbar select "Templates" then "Import File" then select your file from your "C" drive or available network drives.

If you are using the Legistar File Text Editor you can import a document directly into Legistar by clicking on "Edit Current" then clicking on "New" and "Import" then select your file from your "C" drive or available network drives.

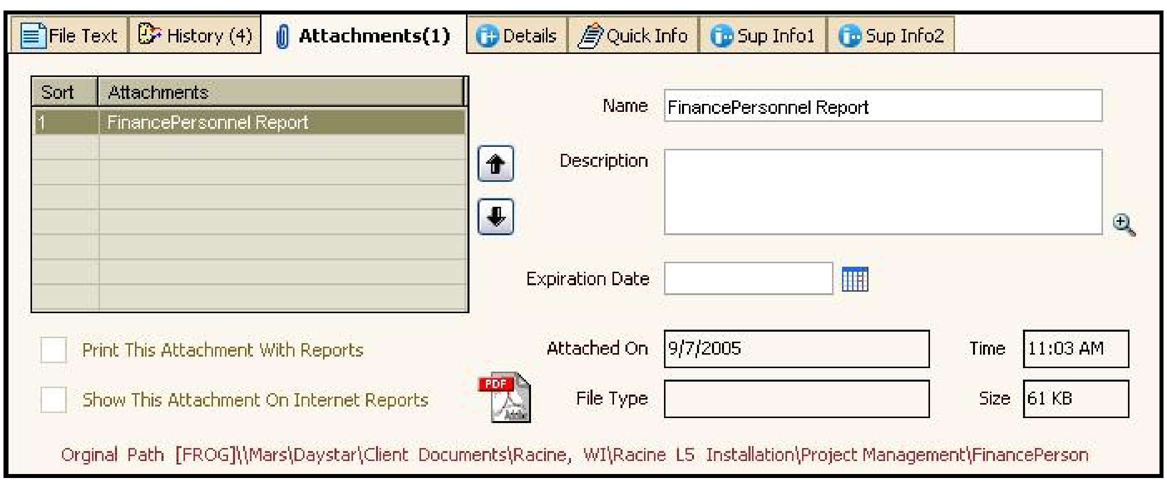
History



Legislative File history lines show all the actions that have been taken on a file. When viewing the history lines you will see all the actions from the introduction, routing to various committees, and the final action.

The actions are added automatically when processing actions in the minutes section of the Legistar or they can be manually added directly to the Legislative File through the record editor box. This is typically done for approvals or signature lines.

Attachments



Attachments are typically referred to as supporting documents or back-up material, which is part of an agenda packet, and can be spreadsheets, video clips, maps, photos or sound files. The attachments form allows you to add, view or delete (with the proper security) any document attached to the Legislative File.

To add an attachments you can either scan or import the document into the Legistar database. Once an attachment is added it becomes a permanent part of the file and

cannot be edited through Legistar for security reasons. If the attachment does need to be changed or the incorrect attachment was added you would delete it and then reattach the updated or correct document as an attachment.

To open an attachment properly you must have the associated program installed on your computer.

How to Sort Attachments

Attachments are sorted in the order they are attached the first attachment that is imported is attachment number one, the second attachment imported is attachment number two, etc. Because attachments are available to a wide range of individuals by either be printing or becoming hyperlinks on the HTML agendas and minutes, the order is important and as additional attachments are added them may take priority over attachments.

To change the order of an attachment "Select it by Highlighting" then use the "Up or Down Arrows" to move the attachment to the correct location. In addition, you can "Right Click" on the listing of the attachments and select options to automatically sort the attachments.

Print this Attachments with Reports

Click this box if you want the attachment to print with the agenda or minutes report during printing. This function is typically used when preparing the agenda packet.

It is recommended that when printing the attachments they be in the format of Microsoft Word or PDF, which can easily be opened by any computer. Other document types can be attached, however it could be problematic during printing if the associated program is not installed on the computer sending the print job to the printer. Typically, the person who attaches a document is not the person creating the agenda packet.

Show this Attachment on Internet Reports

Click this box if you want the attachment to become a hyperlink on the agenda and/or minutes reports. Some attachments may not be available to the public, in which case you would not click this option.

It is best to have the attachment as a Microsoft Word document or a PDF document, which can easily be opened by any computer.

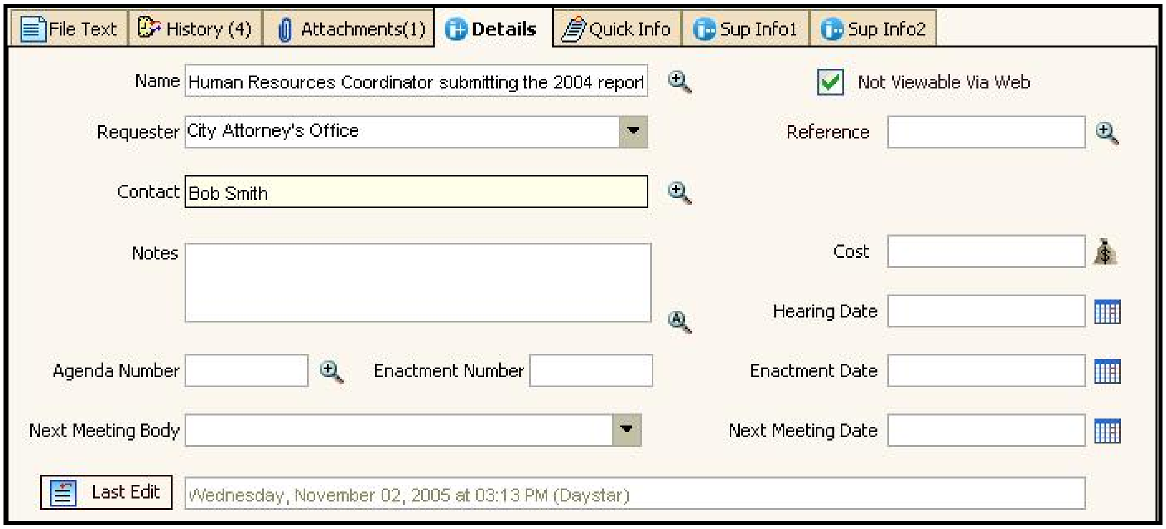
Expiration Date

Your records retention rules will dictate how long an attachment needs to be a permanent part of the Legislative record. Entering the expiration date doesn't automatically delete the attachment, it is to be used as a reference.

The System Administrator would use the Attachment Utility from the tools option to locate all the attachments that have expired and remove them from the database, however the Legislative File will remain.

Details

The Details section contains additional fields that are very important. Many of these will you may not use. None of these fields are required so you can always leave unused fields blank. They are referenced here in generic name, however you have the ability to rename these fields.

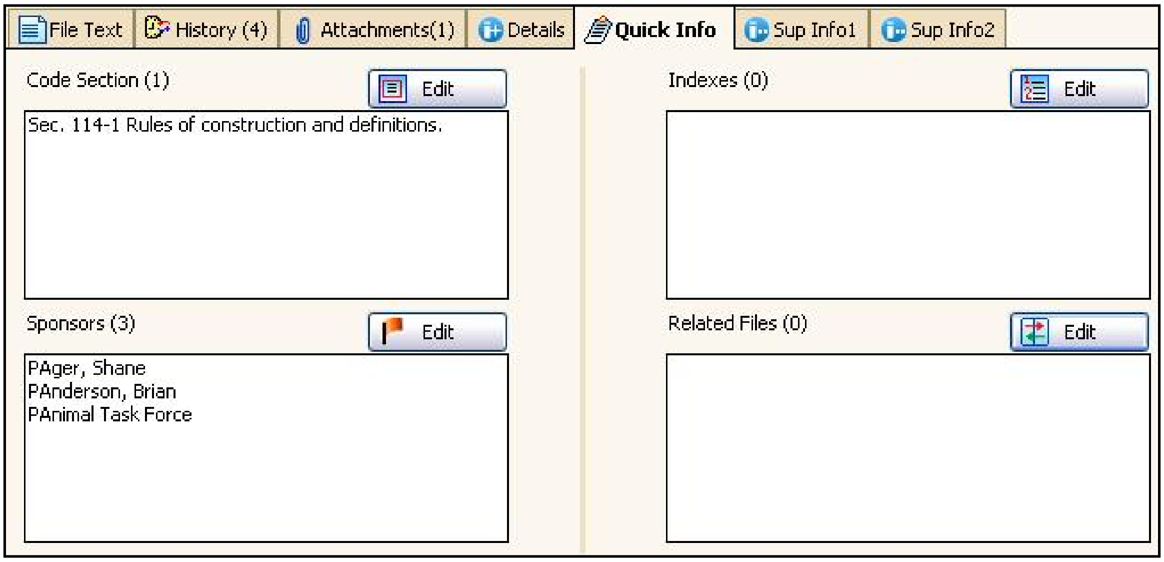


- **File Name - shorter version of the file title which will identify files on agenda & minutes forms**
- **Not Viewable Via Web - checking this keeps the file from appearing on the web**
- **Requester - the name of the committee, group or person requesting this file this can be manually entered or select from the drop down box**
- **Reference - can be used for a department or committee number, limited to 20 characters**
- **Contact - person to contact for information regarding this file**
- **Cost - cost associated with the file**
- **Notes - any notes on the file these can show on certain reports**
- **Agenda Date - next time you want this file to appear on an agenda**
- **Hearing Date - this allows you to reference the date of the hearing if applicable, this field doesn't have any function other than reference**
- **Enactment Date - date the file was enacted**
- **Agenda Number - the agenda number can be put in this field and then during generation it is displayed through the item number box, this is best used for items that are late as agenda numbering is typically done on the agenda form.**
- **Final Action - date that the final action was taken on the file.**
- **Enactment Number - numeric value assigned based on order the bill was enacted**
- **Next Meeting Body - next body that will have this file on their meeting**

- **Next Meeting Date** - allows you to reference the next meeting date, this can be used for first and second reading, the next meeting date is for reference only
- **Last Edit** - displays the person to last edit the file, what they did and when. Click on the 'Last Edit' button to view all the people who had edited the file since inception

Quick Info Tab

The Quick Info tab allows users to add from selecting lists of predetermined choices. These four categories can have unlimited selections, which are added through a list-to-list box.



Legislative Code Sections

The Code section list-to-list box allows you to reference parts of your Municipal Code to legislation. This is very valuable when searching and you want to find every piece of Legislation that affect a particular code section.

Sponsors

Sponsors can be an individual or body who backs a particular piece of legislation. The primary sponsor is the listed first, and the order can be changed by the up and down arrows.

Sponsorship can change if a new version is created, therefore each version of a file can have different sponsors.

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

Available Choices for Sponsorship

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

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

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

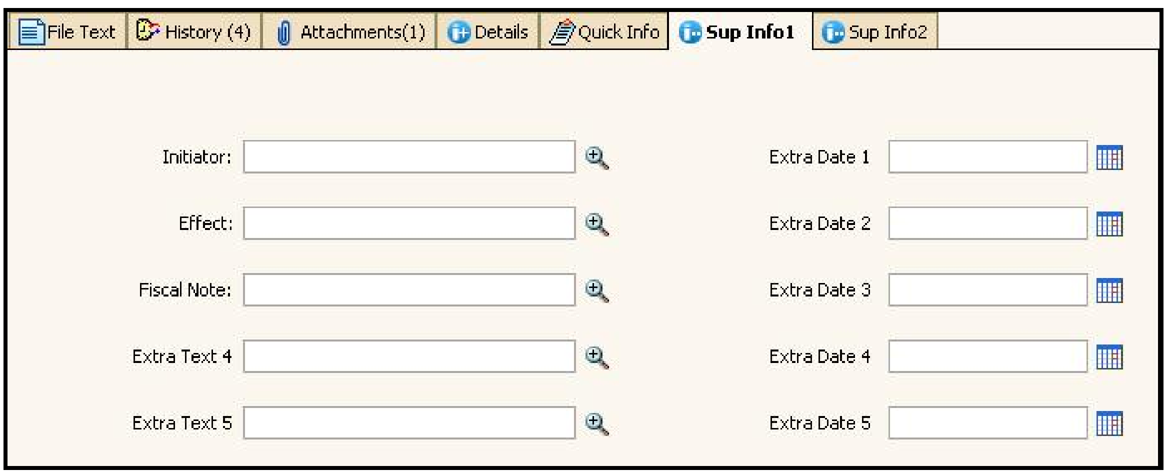
None - There will not be any choices in the sponsor list-to-list box.

Related Files

Allows you to link Legislative Files together that are related. Historically we have found that client's have used this for files that are part of a project, purchase order, or veto.

Sup Info 1 & 2

The Supplemental information tab is used differently for each client, or possibly not used at all. Each field can be renamed allowing the client to tailor the Legistar system to meet their own needs. Your Project team will decided if these tabs will be used and you will be trained on those specific details. You may find after a period of time a particular need for one of these fields.



All of the fields are searchable so it is any easy way to track Grant Control Numbers, License Numbers or any other needs from a particular department committee. Because of the searching capabilities you can track and run reports on the results. Clients have found that the matter summary report is a helpful tool when there is a request for a group of files.

Many clients will not use any of these fields or just use one or two while others will use most or all of them. Daystar leaves the fields available for any future needs you may have.

Tools Menu - Legislative Files

The tools menu contains a bunch of different options that remain fairly consistent from screen to screen.

- **File Assignments - allows you to assign files to certain users when the Legislative Files is in "draft" status.**
- **Attachment Utility - is used to manage the attachments that have expired according to the expiration date for each attachment.**
- **Security Log - tracks the user's name and all edits on the Legislative File.**
- **Spell - spell checks everything on the page.**
- **Security Log Admin - displays the edits made in the Administration section.**
- **Error Log - keeps records of all errors received, this is very helpful in reporting any issues to Daystar.**
- **Search Only on My Assigned Files - searches only on the Legislative Files that have been assigned to you in the file assignments section.**
- **Lock - locks the record you are working with at so no users are able to edit. Once you selected on the "edit record" option the file is locked to you exclusively, therefore it is best to save and exit the file promptly to allow other users to access the file for their processing.**
- **Create Resolution From - allows you to create batch resolutions.**
- **Refresh - updates any data on screen incase any changes were made by another user.**
- **Standard Paragraph - allows you to store commonly used text to quickly access and copy to the clipboard and paste into Legistar.**
- **Assign File Id's - allows you to assign File Id's.**
- **Undo File Id Assignment - allows you to undo File Id assignment.**
- **Refresh Administration - allows you to get the most recent administration changes.**
- **Approval Web Link - takes you to the Web Approval screen.**

Legislative File Reports

The reports that can be printed from the Legislative File section include:

- **Certified Copy - This report generates a certified copy of the Legislative File text. The report includes the clerk's signature and the file sections ..title and ..body. The certified copy report can only be produced on files that have a final action.**
- **Master Report - The Master Report is a printout of all information and history for the selected legislative files displayed on the screen. The criteria form for the Master report allows you to run the Master report and determine to show the text with or without a page break or not to show at all. In addition, to allowing you to decide the amount of detail you want to provide by allowing you to select the history, note or verbose action or any combination of these options.**
- **File Summary - The File Summary report is a summarized version of the legislative file. It prints the file number; type, title, status, introduced date, and in controlling for all selected files. There is a not criterion for this report.**
- **Signature - This report produces a copy of the Legislative File formatted for official signatures. Only sections ..title and ..body will print on this report. The signature report can only be produced on files that have a final action.**
- **Text File - Text file report produces the complete text (all date that is entered in the File Text box) of a Legislative File.**

Report Options, Settings and Destinations

When in the Agenda or Minutes forms you can select certain lines and print only these selected lines. Use the shift key to select individual lines or the ctrl key to select a group of lines then CLICK on the reports button and select the report to run. The report will only display the lines that you selected. If no lines are individual selected the default is all lines.

The Report Destinations are where you will send a specific report. Reports can be automatically opened or saved in several different programs such as PDF, HTML, etc. These choices are valuable because they allow you flexibility in producing a report on demand with certain criteria. The "save report" option will prompt the user to save the report in a file, in the format selected.

The destinations are: Internet HTML, Word Document, Adobe Acrobat (PDF), Printer, Email and Publish to Calendar.

Working with the Signature Block *(Certified Copy and Signature Reports)*

After you have selected the Certified Copy or Signature reports from the drop down selection list the default settings for each report will display. The default signature format is set up in Administration. You may now edit any of the default text/settings or click on the preview button to display how the text will look on the report through the preview box.

You have three boxes that assist you when working with the Signature Block which are: *Available Variables, Signature* and *Preview.* When you are editing the signature block you may need to use all three of these boxes.

Available Variables Box

The Available Variables box displays all the Legistar options that are available for use in the signature block. The variables are easy to recognize mostly because they are self-explanatory. In front of each variable name you will see a pipe - " | " which is typed by the back slash (caps lock) key directly above the enter button. For example, |CLERKNAME is used for the clerk's name.

Signature Block Box

The signature block box displays the default sentence as it is set up in Administration, which should be the verbiage that used by your City most of the time. The need for changes this text should be minimal if any. If you are changing it every time it may be time to update the default sentence, which is done by the System Administrator - see Building the Signature Block. To change a variable or word in the signature box you can type directly in this box or place your cursor where you want to add the variable, select it by highlighting and then click on the right arrow key and the variable text is placed where your cursor was.

Preview Box

The preview box allows you to preview the exact data for this specific file. If there is no data present the variable will show as it is in the signature box.

I, |CLERK, certify that this is a true copy of |MATTERTYPE No. |FILENUMBER,

|RESULT by the |ACTINGBODY on |ACTDATE.

I, Tim Glasco, certify that this is a true copy of Ordinance No. 2004-05, passed by the Common Council on November 15, 2004.

Available Variables

Field Name	Legistar Code
Clerk Name	|CLERKNAME
Matter Type	|MATTERTYPE
File Number	|FILENUMBER
Matter Status	|MATTERSTATUS
Acting Body	|ACTINGBODY
Vote Result	|VOTERESULT
Action	|ACTION
Action Date	|ACTDATE
Enactment	|ENUMBER

Number	
Passed Date	**|PASSDATED**
Hearing Date	**|HEARDATE**
Meeting Body	**|MBODY**
Meeting Date	**|MDATE**
Office Title	**|OFFICETITLE**
Action Text	**|ATEXT**
Mover Last Name	**|MOVERLASTNAME**
Mover Display Name	**|MOVERDISPLAYNAME**
Seconder Last Name	**|SECONDERLASTNAME**
Seconder Display Name	**|SECONDERDISPLAYNAME**

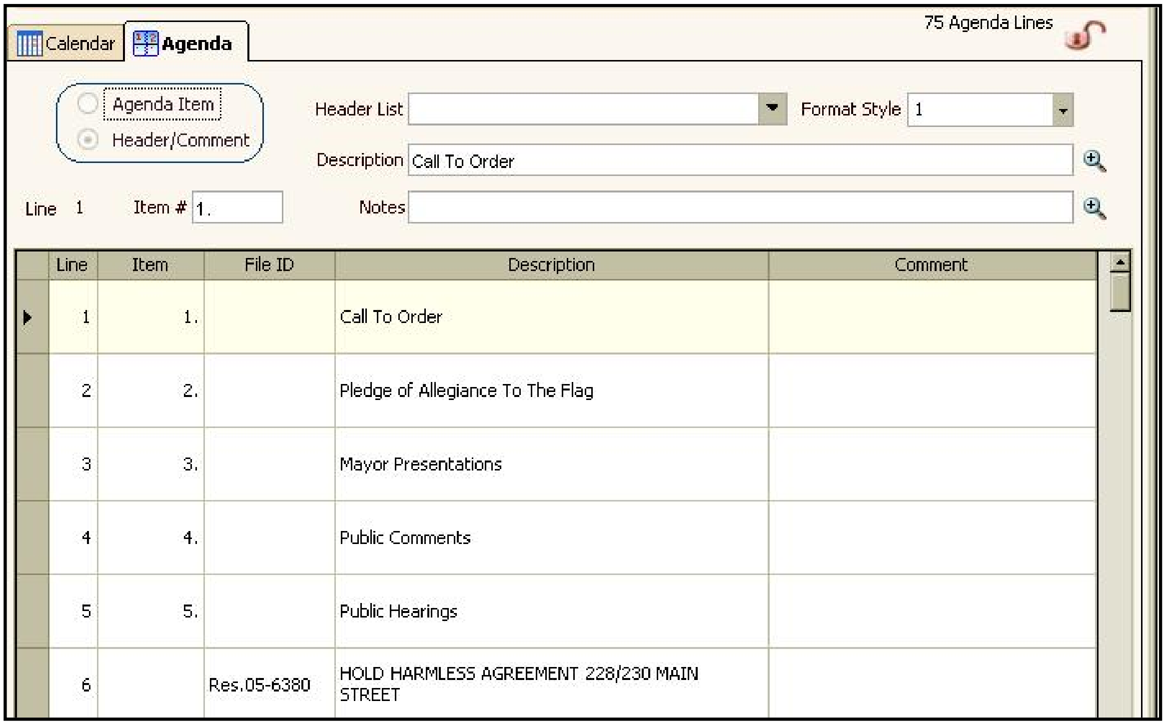
Attachment Utility

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

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

By selecting different lines you can print or delete using the buttons to the right. From this screen you delete attachments that are expired or leave them for later if they are still needed. You can also print any attachments if you want to make hard copies before deleting them.

Agendas



Agenda Overview

Meeting Agendas are created by the CLICK of one button! After you CLICK the generate button the Legistar system checks all the Legislative Files and retrieves the appropriate files for the agenda. The agenda definition tables in Administration define the agenda order, headings and which Legislative Files are to placed on an agenda.

The criteria used to determine where a file appears on an agenda are: File Type, Status and In Control - additionally the agenda date can be used.

The easiest way to understand how this function works is to examine one scenario. Typically, Ordinances on First Reading are found in a certain place on the agenda so in the Legistar Administration table there will be the following entry:

If the File type = *Ordinance*

If the Status = *First Reading*

Then place the files that match under the "*Ordinances for First Reading*" heading. Similar rules will be set up for each section of the agenda allowing you to group files according to your agenda order.

It will be important for you to understand what places a file in a particular place so you can trouble shoot and determine why a Legislative File is not on an agenda or is on an agenda you don't want it to be. During Legistar training you will be provided

these exact details or the system administrator can print you an agenda definitions report.

When a meeting agenda is generated, a corresponding minutes form is created at the same time. The minutes form is an exact copy of the agenda and is used to record the meeting actions and votes after the meeting has taken place.

Agenda Navigation

From the Agenda Tab you can move directly to the minutes section by clicking on the Minutes button on the top of the screen. You can go directly to a Legislative File by double clicking on the file's line on the agenda form. This will take you to the Legislative files screen where you can review/edit the file and then press 'Go Back' at the top of the screen to return to the agenda form.

Agenda Calendar

The calendar tab allows you to view recent agendas; the view is controlled by a global setting in Administration (see system setting). You may define your search to a certain meeting body by selecting the body name and then CLICKING on search. If you do not select a body name and CLICK on search you will retrieve all the records. To view a specific meeting agenda double CLICK on the line or select the line and then CLICK on the Agenda tab.

Date	Day and Time	Meeting Body	Status
November,2005(			
11/4/2005	Fri - 7:00 PM	Common Council	Draft
11/2/2005	Wed - 12:01 AM	Public Works and Services Committee	Draft
11/2/2005	Wed - 12:01 AM	Finance and Personnel Committee	Draft
11/1/2005	Tue - 7:00 PM	Common Council	Draft
October,2005(27			
10/31/2005	Mon - 7:00 PM	Common Council	Draft
10/24/2005	Mon - 7:00 PM	Common Council	Draft
10/19/2005	Wed - 7:00 PM	Common Council	Draft
10/18/2005	Tue - 7:00 PM	Common Council	Draft
10/18/2005	Tue - 7:00 PM	Common Council	Draft
10/18/2005	Tue - 12:01 AM	Finance and Personnel Committee	Draft
10/17/2005	Mon - 12:01 AM	Board of Health	Draft

Changing the Meeting Date

When in the calendar tab you can change the meeting date of an existing meeting. For example, let's say a meeting was cancelled. Rather the creating a new agenda for the new meeting you can just change the date of the existing meeting, and if needed created a cancellation notice for the meeting that was cancelled. To do this select the meeting that you want to change the date on and then go to the tools menu bar and select "change meeting date."

Creating an Agenda and Generating

To Create an agenda click on the "New" button from the Calendar tab. After clicking on "New" select the body (name of the group) for the agenda that you are creating, then select the date all other fields should default to the correct information unless there was a change which can be overridden if needed.

Agenda Generation

Then click on the "Agenda Tab" and click on the "Generate" button in the left hand corner of the screen. At the time the generate button is CLICKED Legistar will go through the database and place all the files on the agenda according to the Agenda Definitions for the body you have selected. In a perfect world after the generate button is clicked you would be ready to run the report, however because mistakes can happen you need to review the agenda and determine if lines need to be moved, deleted or added to the agenda form.

Agenda Status

When the agenda is generated the status will be "draft" the status of draft is used to prevent other users from viewing the agenda until the status is changed to "final." This can be set up and is controlled by security; therefore if you have a group of individuals working on the agenda they can all view the agenda in draft status.

What is in the Description Field?

The description field on the agenda and minutes form holds the text from the "name" field in legislative files form under the details tab. The description cannot be as long as the title because it would not allow for a user-friendly form. The description is shown on the form to make it easy for the user to quickly identify the legislative files and move, add or deleted if needed.

Agenda Auto-Numbering

After the agenda is in perfect order CLICK on the auto-number button if you would like your agenda items to receive agenda item numbers. If you do not use agenda item numbers you should not click on this button. You can auto-number as many times as necessary. The default numbering is to number all items under each heading starting 1 and resetting on each heading to begin with 1. Your agenda numbering could work differently if the default numbering was not operationally the numbering that you would use. For example, we have some client's that number all files starting at 1 going through the end of the agenda.

Format Style

On the meetings form (agendas and minutes) the style selector allows you to control the sizes of the headings.

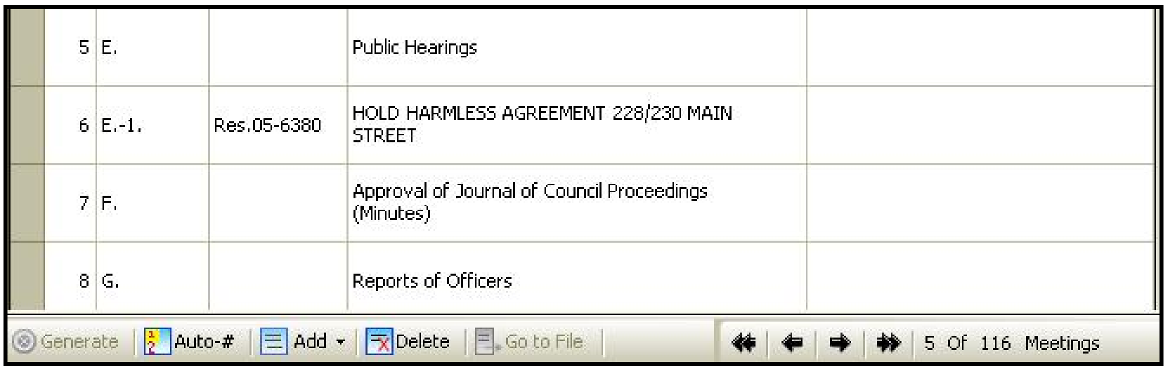
Style 0 - left justified, size 10, Arial. Used for Legislative files.

Style 1 - left justified, size 13, Arial, Bold. Primary heading

Style 2 - left justified, size 11, Arial, Bold. Secondary heading

Style 3 - center justified, size 11, Bold. Secondary heading

Agenda Lines



There are two types of agenda lines; Header Lines and Legislative Files, which is indicated in the radio button choices to the left of the file id. When you select a line the detail of the line is displayed above in what is called a workspace. After the agenda is generated some review will need to be completed

Header Lines are procedural items such as invocation and roll call, or section titles such as Communications from Municipal Agencies or Bills Introduced.

Legislative Files are records from the database and can easily be recognized on the agenda form by the presence of File ID numbers.

Working with Agenda Lines

Adding Lines

There are several ways to add agenda lines the first is to add them one at a time by clicking with the left side of your mouse on the button at the bottom of the screen that says "Add" it will place the new line below the line you had highlighted. Or you can click on the arrow and select whether to add the line above or below the selected line. This will add a blank line, which you can use as a header or set the line to represent a Legislative File.

Add Many

If you are adding more then one Legislative File you can click on the small down arrow to the right of the "Add" button. This will allow you to select the option

of "Add Many." This will open a box on the right allowing you to select Legislative Files by highlighting it, then press the arrow pointing to the right to add as many matters as many times as you need. Press the arrow pointing to the left to close the Add Many window.

Deleting Lines

Deleting a lines is simple you just select the line that you would like to delete and click on the "Delete" button.

Copy Selected Line

When you use the Copy Selected line function the line you have highlighted is copied and added to the form after the highlighted line. Typically, this will be used when you have one file that had several different votes, a line with the same file id will need to be added to record each vote separately. So if you had three votes on the same file you would select the line and CLICK on 'copy select line' two times, then you would see the file list three times and you could process your votes in the order they occurred.

Agenda Reports

Reports printed from the Agenda section include:

§ **Hearing Notice** - This report produces hearing notices for agendas. You can select people to address the hearing notices to in the criteria section.

§ **Meeting Agenda Long** - Typically, the Long Minutes is the more formal report, including a cover page and all the details. However, now that you can rename the report and determine what prints on each report by the criteria options it allows much more flexibility and convenience.

§ **Meeting Agenda Short** - The Short Minutes usually was produced without a cover page and the history, however now that you can rename the report and determine what prints on each report by the criteria options you can determine what you will use you will have for this report.

Agenda Criteria Options

§ **Show Cover** - Show an extra page with the logo, listing of body members, etc.

§ **Show File Id** - Show the Legislative File Id on the report.

§ **Show Agenda Status** - Show the status of the meeting, allowing individuals to distinguish between a draft and final copy of the report.

§ **Show Legislative File Sponsor** - Show the Legislative File sponsor.

§ **Keep Section Together** - This option keeps the section together and will not start a Legislative file on the bottom of a page to keep all the text together.

- § **Show Notes** - Show the agenda note on the report.

- § **List Attachments** - This will list all the attachments that are a part of the Legislative File.

- § **Show Text Title** - Show the ..title on the report.

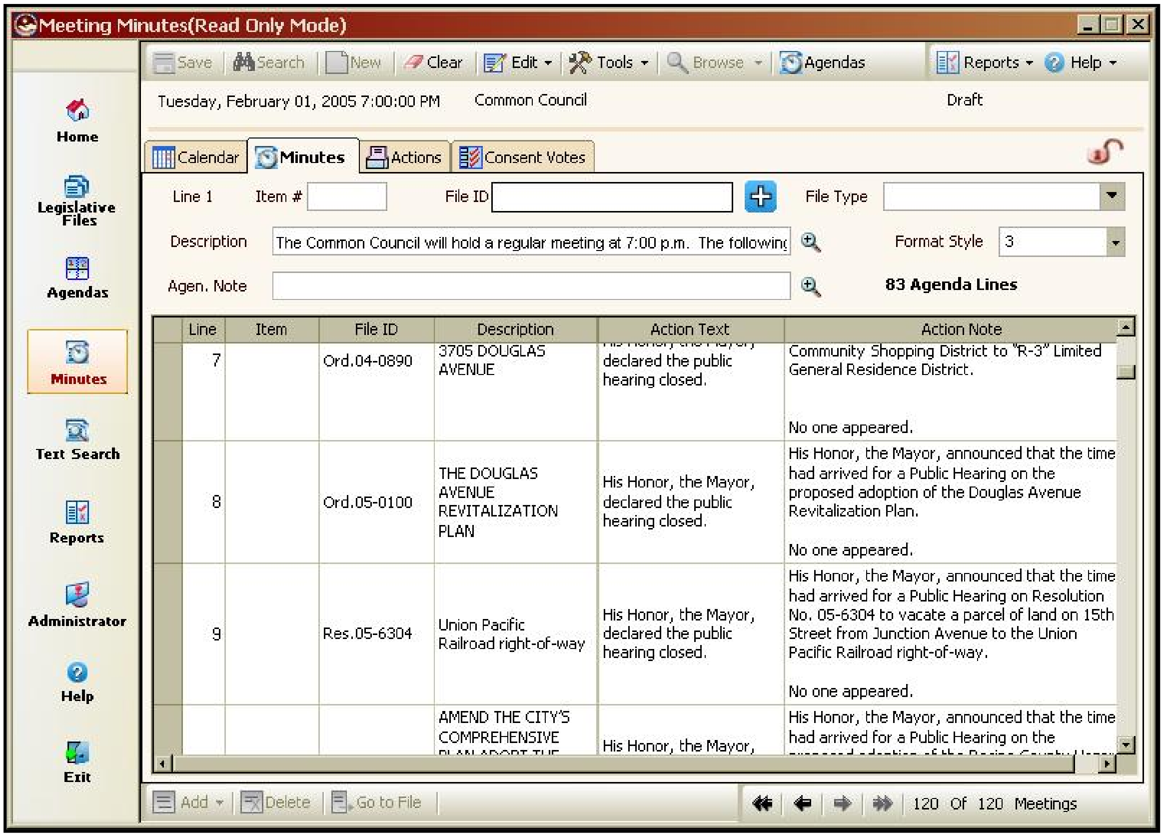
Report Options, Settings and Destinations

When in the Agenda or Minutes forms you can select certain lines and print only these selected lines. Use the shift key to select individual lines or the ctrl key to select a group of lines then CLICK on the reports button and select the report to run. The report will only display the lines that you selected. If no lines are individual selected the default is all lines.

The Report Destinations are where you will send a specific report. Reports can be automatically opened or saved in several different programs such as PDF, HTML, etc. These choices are valuable because they allow you flexibility in producing a report on demand with certain criteria. The "save report" option will prompt the user to save the report in a file, in the format selected.

The destinations are: Internet HTML, Word Document, Adobe Acrobat (PDF), Printer, Email and Publish to Calendar.

Minutes



Minutes Calendar

The records displayed on the calendar are controlled by a global setting in Administration (see system setting). You may define your search to a certain meeting body by selecting the body name and then CLICKING on search. If you do not select a body name and CLICK on search you will retrieve all the records. To view a specific meeting agenda double CLICK on the line or select the line and then CLICK on the Agenda tab.

Minutes Overview

After the meeting has taken place the events from the meeting are recorded in the Minutes form. This includes actions, voting and the dialogue and other activities at the meeting. Legistar provides an easy-to-use form to process the minutes by a point and CLICK function allowing you to select the action, enter the mover and seconder, and then record the vote. In fact, immediately following the meeting a summary report can be created and distributed. Detailed information and dialogue can be entered after the meeting when you have more time.

Getting Started (preparing for the meeting)

We recommend getting as much work done on your minutes form prior to the meeting. By "prepping" the minutes form you enter the things that you know will typically happen prior to the meeting, therefore if you are using Legistar live all you have to do is record the action, votes and dialogue during the meeting. Listed below you will find processing or functions that can be done before the meeting.

Marking Consent

All the legislative files that are on the consent agenda should be marked consent prior to the meeting. This is done by selecting the first file on the consent agenda and you must RIGHT CLICK on the line number column while holding down the SHIFT KEY, then go to the last file and continue to hold down the SHIFT KEY then RIGHT CLICK on the line number of the last file. This process is the quickest way to mark all the group of Legislative Files as "consent" items. After you are done you will see that the line numbers turns red for all the legislative files. The header lines will not be marked as consent (even if they were selected during the marking process) you will receive a system message stating that they will not be marked consent because there is not a file associated with that line.

If some of the legislative files are pulled from the consent agenda, then you simply unmark them consent and you can move them to the appropriate section.

Procedural Items

Any standard text or other details that you know prior to the meeting such as call to order text, individuals who are always noted as present who are not official members of the body, adjournment text, etc. can be added to the minutes form before the meeting. For example, on the Call to Order line you may always type, "The Mayor called the meeting to order at 7:00 PM" therefore this text can be entered before the meeting and edited if necessary. In fact, if you have text that is entered for every meeting it can be stored as a standard paragraph allowing you to easily copy and paste the text when needed.

Legistar Actions

When an action is taken on a Legislative File the result is a change in status and/or controlling body, which moves the file to the next position in your workflow. The resulting status are set up for all file types and meeting bodies in valid action tables of Administration. For example, if an Ordinance has the action of "Passed on First Reading" taken the status will flip to "Second Reading" automatically the file is ready for the next meeting.

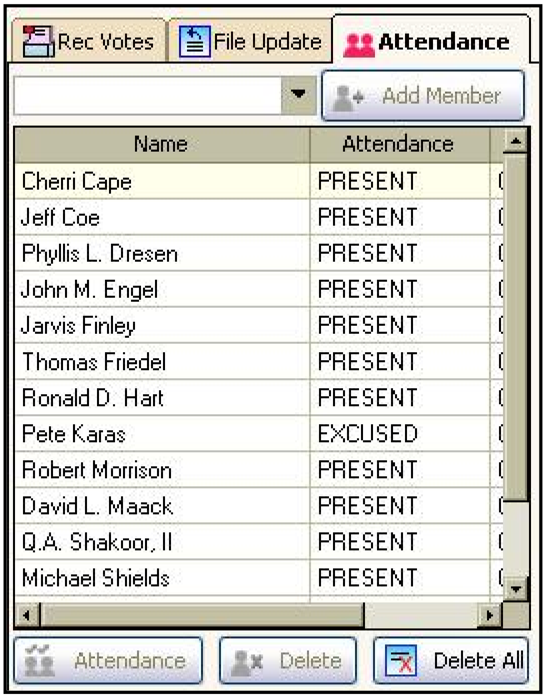
Processing the Minutes

When you process the minutes you start with the first procedural item or Legislative File, however if multiple users are processing (they can process in the same minutes form - just not on the same Legislative File at the same time) they may work in respective sections. Whether you process the actions during the meeting or after, the action date is the date of the meeting. Typically, at the beginning of the meeting there is a call to order, attendance, and then the items for business (first reading,

second reading, committee reports, etc.) on the minutes. Each client has a different order, however we are going to talk about the process and let you apply it to your specific order of business.

Attendance

Taking attendance is required prior to voting on any Legislative Files to determine which members are available for voting. Legistar allows you to take multiple meeting attendances and it will print each time. The options available (present, absent, excused, etc.) are designated in the Administration Tables, which your System Administrator can change.



From the Minutes tab, select the line from the workspace that the roll call should be processed on; the roll call will print below the header for the line selected. Typically, roll call is taken on the header line that says roll call. CLICK on the attendance tab.

The attendance tab will open for you to CLICK on the "Attendance" button, after doing this the Legistar system will automatically default all members as present. The assumption is the meeting would not be held if there were not enough members present. If a member is absent update their record to the appropriate option provided in the drop down menu.

Roll call can be taken multiple times during a meeting, each time you take roll call it will show on the form by the item number turning red, bold and underlined.

Tips:
If you do not want attendance to print each time and your members leave throughout the meeting, you can update the choices at vote time. For example, you can change absent to a vote and you can mark a member absent if they have left the room. Then you could just note that the person arrived or left in the action note field.

Action Note vs. Action Text

First, you start by being on the minutes tab where you will enter text on the respective lines based on the events of the meeting. There are two places where you can manually enter text for a legislative file or a header line. They are the "action note" and the "action text." Some lines may just get an "action note" such as on the call to order line, you may note the meeting was called to order at 7:00 pm. That is all you may have to do on that line and you move on to the next line.

However, some legislative files and header lines are on the minutes form may receive a mover and seconder, action, a vote and even a note. The form is set up and ready for you to use and enter what happened in the appropriate fields.

The action note is where you can enter speakers, dialogue and any other detail on a specific file. It shows on the report after the title in italics size 8 font.

The action text is built from what is entered in the following fields: mover, seconder and action. It combines those variables together along with the vote to create your motion string. This is held in the action text box so you can edit if needed. This shows on the report after the note and it is bolded text.

Actions

The actions are set up according to agenda definitions by files type and selected through the drop down box. At times you may need to take action on a header line, an example could be adjournment. We will also set up actions for your header lines, typically there are not many. Therefore, the list of actions is available for you to select from the drop down box by file type and body type because the primary legislative body has more control than other bodies. The list of actions in this drop down was created by your project team and will create consistency for your installation. If you do not find the exact action you want, select the most appropriate.

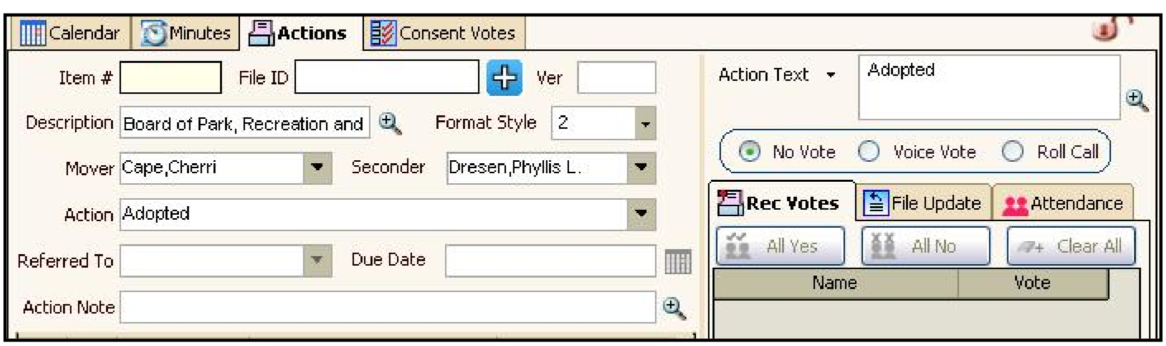
Referred to

Any time you select an action, which the words "referred to" after the action you have to select a "referred to" body. In addition, you will indicate a "due date" which is the date you want the item back to your meeting.

Taking Actions and Building the Motion String

The activities of the meeting are recorded in the Minutes form, no matter what level of detail you record it all is processed in the minutes form. The form was designed so you can quickly process the action and votes, then if necessary go back and enter detail dialogue.

Typically, when you take actions you typically start at the beginning of the form with Roll Call and then move down the list of items accordingly.



Processing the Motion

When you are on the actions tab in the minutes section you will enter the mover, seconder, action, which will build the action text and place it in the zoom box, which you can edit if needed.

Mover - Select the mover name from the drop down box.

Seconder - Select the seconder from the drop down box.

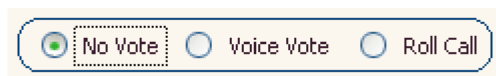
Action - The action is selected from the drop down box, the list in the drop down box changes depending on the body and the file type. Taking action results in a change in the file status.

Action Note - shows on the report (if the criteria is selected) directly below the title of the legislative file) size 10, Arial, Italics.

Action Text - The action text is build based on your entry of a mover, seconder and action. After you have entered all these shows on the report (if the criteria is selected) after the action note size 10, Arial, bold.

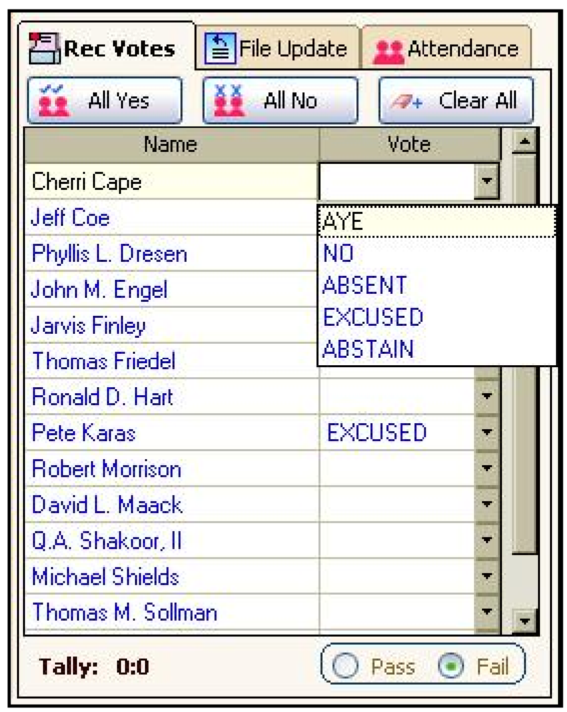
Voting Actions

A voting action must be selected for each Legislative File. There are three voting actions and it is required for each file.



In addition, the voting action also determines dictates the text that placed in the action text box which also appears on the minutes report. For example, Roll Call vote uses the typical verbiage of: "The motion passed by the following vote." Voice Vote uses: "The motion passed by unanimously."

- **No Votes Taken - a vote is not taken, typically this is used for actions such as "heard" or "discussed."**
- **Voice Vote - which is a unanimous vote and is not recorded on the voting record report.**
- **Roll Call Vote - which allows users to specify the vote of each individual.**

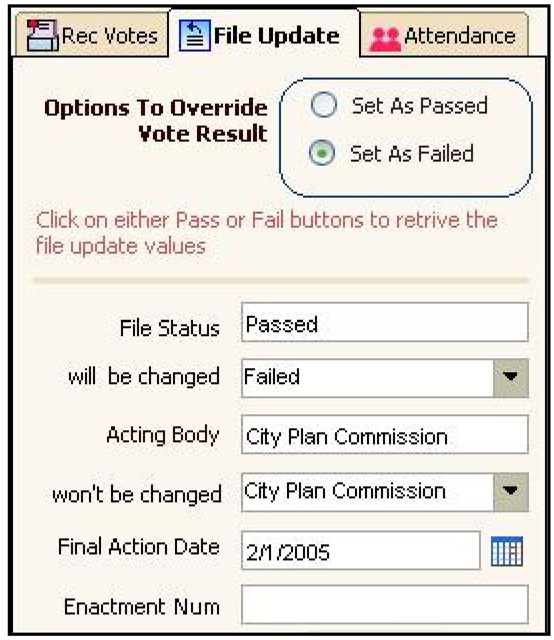


The Vote Choices allow users to process different vote choices such as: Yes, No, Abstain, etc. This list is controlled by you and can be updated in the System Administration/Vote and Attendance Settings.

The member list that is used in voting is maintained in the Office Members section of Administration.

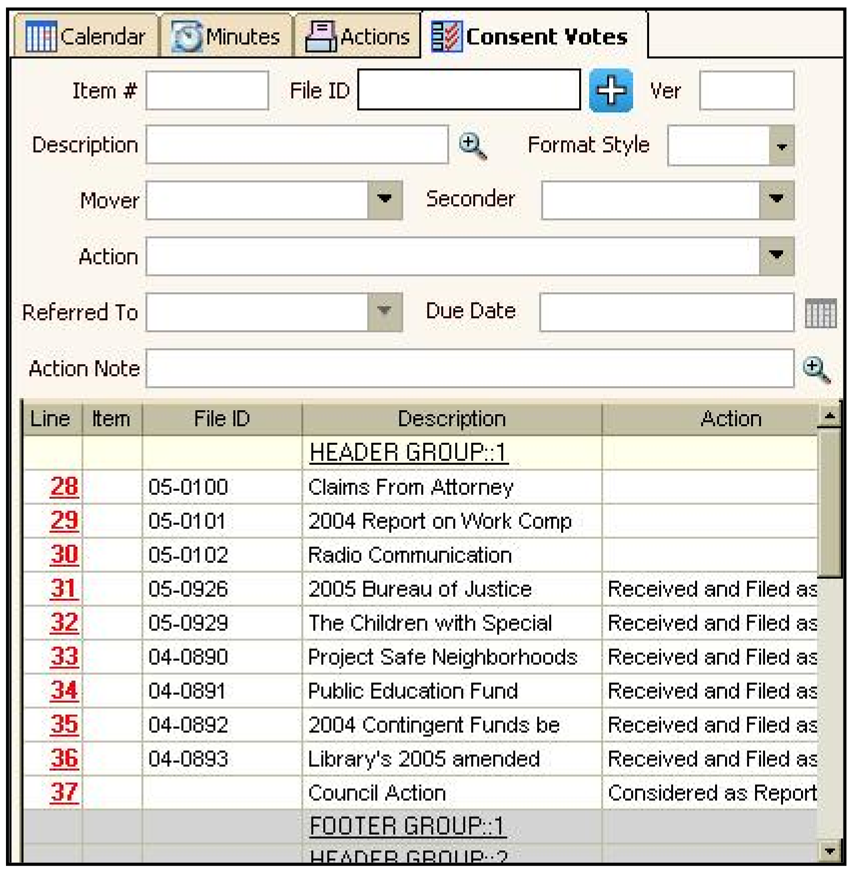
The votes will create results for the Legislative Matters: Pass, Fail, and Tie.

File Update



After voting, the file will update. To view the updates CLICK on the "file update" tab. Typically you should not have to change the file update because it was set up correctly according to your procedures. However, there are rules that cannot be anticipated. If a legislative files meets quorum, however needs a certain number of required votes and doesn't receive them the system thinks the file passed. However, because it did not receive the required votes it really has failed. This is an example of when you would use the override option of "set as failed."

Consent Voting



Typically consent items are voted on as a group and are found listed under special heading on the agenda and minutes. The first step is to mark all the legislative items as consent, which is dong prior to the meeting. Because some of the legislative files are pulled for discussion from the consent agenda they can be unmarked. This is done by selecting the Legislative File and CLICKING on the "UnMark Consent" button. After a legislative File has been marked as consent the line number is red, bold and underlined. At this time you may have to move the line and group all the pulled items together for discussion.

Consent Minutes Tab

After the legislative items have been marked consent you can CLICK on the consent minutes tab, which displays only the items that have been marked consent. The consent vote can only be processed when you are in the consent minutes tab.

Processing the Consent Vote

You have to be on the consent minutes tab to process the consent vote. The consent vote processes the standard action on all these files. The standard action is what typically happens to a legislative file when it is routine in nature and has no special conditions. There can only be one standard action per file type, which is set up in Administration and maintained by your System Administrator.

For example, if a resolution is typically approved and that is what happens 95% of the time the standard action of "approved" would be the standard action for a resolution. This is a common procedure for most meeting bodies.

The action that is processed is carried to the minutes tab; the user can manually change this action if needed. In addition, if there is not a standard action set up for a file type then nothing will be processed on that Legislative File.

Multiple Consent Votes

Legistar makes processing consent votes very easy. All the legislative files that are on the consent agenda can be marked consent prior to the meeting. This is done by selecting the first file on the consent agenda and you must RIGHT CLICK on the line number column while holding down the SHIFT KEY, then go to the last file and continue to hold down the SHIFT KEY then RIGHT CLICK on the line number of the last file. This process is the quickest way to mark all the group of Legislative Files as "consent" items. After you are done you will see that the line numbers turns red for all the legislative files. The header lines will not be marked as consent (even if they were selected during the marking process) you will receive a system message stating that they will not be marked consent because there is not a file associated with that line.

If some of the legislative files are pulled from the consent agenda, then you simply unmark them consent and you can move them to the appropriate section.

Minutes Reports

The Minutes reports section includes four reports, which can be renamed in Administration. All reports have a criteria tab, which allows you to determine the variables that you want to show on the report each time you run it.

- **Meeting Minutes Long - Typically, the Long Minutes is the more formal report, including a cover page and all the details. However, now that you can rename the report and determine what prints on each report by the criteria options it allows much more flexibility and convenience.**
- **Meeting Minutes Short - The Short Minutes usually was produced without a cover page and the history, however now that you can rename the report and determine what prints on each report by the criteria options you can determine what you will use you will have for this report.**
- **Meeting Referral Notice - Prints all actions taken during the meeting, which were referred or referred to another body.**
- **Meeting Summary - This report only prints the files, no headers, however you can choose other variables on the criteria tab.**

Report Options for the Motion String

(Certified Copy and Signature Reports)

From the Setting tab on the report menu you can build your signature block. The signature block is used on the Certified Copy and Signature reports. Click on the preview button to display how the text will look with the appropriate values populated by Legistar.

From the Setting tab on the report menu you can build your signature block. The signature block is used on the Certified Copy and Signature reports. You have three boxes on the settings tab in Legistar these are: *Variables, Signature* and *Preview.* When you are building your signature block you can use all three of these boxes.

Available Variables Box
The variables box displays all the Legistar variables that are available to use in the signature block box. The variables are easy to recognize because they are self-explanatory by name, however in front of the name you will see a "pipe" which is typed by the back slash key directly above the enter button.

Signature Block Box
The signature box holds the default sentence that is typically used by your City, therefore the changes here will be minimal if any. If you find that you are changing it every time you may consider updating the default sentence, which is done by the System Administrator. To change a variable or word in this box you can type directly in this box or place your cursor when you want to add the variable, select it by highlighting and then click on the right arrow key and the variable text is placed where your cursor was.

Preview Box
The preview box allows you to preview the exact data for this specific file. If there is no data present the variable will show as it is in the signature box.

> ***A motion was made by |MOVER, seconded by |Seconder, that this Ordinance be Referred to the Board of Health. The motion PASSED by the following vote:***

> ***A motion was made by Scott Hall, seconded by Phyllis Sinksen, that this Ordinance be Referred to the Board of Health. The motion PASSED by the following vote:***

Minutes Criteria Options

- **Show Cover - Show a extra page with the logo, listing of body members, etc.**
- **Show File Id - Show the Legislative File Id on the report.**

- **Show Minutes Status - Show the status of the meeting, allowing individuals to distinguish between a draft and final copy of the report.**

- **Show Legislative File Sponsor - Show the Legislative File sponsor.**

- **Keep Section Together - This option keeps the section together and will not start a Legislative file on the bottom of a page to keep all the text together.**

- **Show Notes - Show the agenda note on the report.**

- **Show Roll Call and Vote Information**

- **Show Action instead of Action Text - Use this option only when printing the action summary if used with show roll call and vote information it will print the action twice.**

- **List Attachments - This will list all the attachments that are a part of the Legislative File.**

- **Show Text Title - Show the ..title on the report.**

Report Options, Settings and Destinations

When in the Agenda or Minutes forms you can select certain lines and print only these selected lines. Use the shift key to select individual lines or the ctrl key to select a group of lines then CLICK on the reports button and select the report to run. The report will only display the lines that you selected. If no lines are individual selected the default is all lines.

The Report Destinations are where you will send a specific report. Reports can be automatically opened or saved in several different programs such as PDF, HTML, etc. These choices are valuable because they allow you flexibility in producing a report on demand with certain criteria. The "save report" option will prompt the user to save the report in a file, in the format selected.

The destinations are: Internet HTML, Word Document, Adobe Acrobat (PDF), Printer, Email and Publish to Calendar.

Full Text Search

Text Search Overview

Legistar's full text search facility searches a matter's text files utilizing either a simple or an [advanced] search. The simple search looks for a word or consecutive words and displays all the legislative matters that have text files matching the search criteria. Full text search also facilitates a Boolean search using and, but and or to narrow the search parameters. Users may further define the search by indicating whether to search the current text file or previous versions.

To display a specific file use the go to matter button, or, double click the Legislative File number displayed.

Advanced Search

The advanced search is for a more detailed search where you can narrow your results to show what you need. Users enter search criteria utilizing conjunctions and, or and not to narrow the search results.

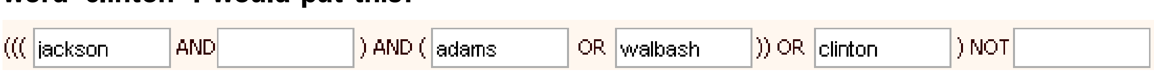
- **And - Locates text files containing all specified words or phrases**
- **Or - Finds text files containing at least one of the specified words or phrases**
- **Not - Excludes text files containing the specified word or phrase**

All of this are set up with parentheses here are some examples.

To search for records containing 'parking' AND 'violation' but not the word 'moving' I would put:

To search for records containing 'jackson' and either 'adams' or 'walbash' I would put:

If I wanted all the matters returned by the above search and all the matters with the word 'clinton' I would put this:



General Reports

Reports Overview

Under the Reports button you will find a series of reports such as: General Certification, Meeting Attendance and Voting Record. All these reports can be renamed, however in this help file they are all referred to by their default name.

These reports allow you to select certain variables to produce to the report, for example for the Voting Record report you have to select the members that you want to view as well as a date range. Most of these reports are self-explanatory in nature and will primarily be used integrally to assist in day-to-day operations.

Tips:
If you have a request for all the Resolutions that were introduced between 1/1 and 1/30 there are several Legistar reports that will provide those results. One way is in the Reports section you would select the File Summary report and the report criteria of Resolution and enter the appropriate date range. This allows you to provide a professional looking report with the results.

Report Options, Settings and Destinations

When in the Agenda or Minutes forms you can select certain lines and print only these selected lines. Use the shift key to select individual lines or the ctrl key to select a group of lines then CLICK on the reports button and select the report to run. The report will only display the lines that you selected. If no lines are individual selected the default is all lines.

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The destinations are: Internet HTML, Word Document, Adobe Acrobat (PDF), Printer, Email and Publish to Calendar.