

Basics for Govt. Bodies

Main tab - create main govt. body here
Also list of dept. in this tab

Primary Leg. Body

Have Mover and Seconder, Mover only or no mover/seconder options

Can control file - make sure any govt. bodies that can control file checked.

It allows the board/body to show the "in control" field in item creation. Very important

Show on web - public facing InSite page with every agency. Do we want this body to show? If so, leave checked, if not, uncheck

Media Manager Export settings (click no to shut box)

Settings that get exported FROM Legistar to MediaManager. Also exports behind the scenes settings

1. Duration - how long is meeting
2. Camera - encoder
3. Archive folder - where to put recording once done
4. Player Template - can have more than one (Board specific)
5. Archive Status - once video is done converting, determines files visibility

Bodies - shows all bodies built in the system

Body Type - Meeting Type (same thing, different product)

Auto Export - best to leave it unchecked. Allows us to control when data/settings get exported to MediaManager

Can be a requestor - little confusing

Relates to a dropdown in the details field. Usually labeled as "department"

Most bodies will not have it checked, most Departments, will

Number of members - on InSite page, can show number of members that belong. Best practice is to fill it in.

Shows vacancies as well

Sort order - 999 click header to sort

Sponsor Type -

Associations tab in Files module

Controls who show or do not show in associations tab

Body Header

Header Text and Extra Text are 2 columns we see here

Header on Agenda documents

List of members typically shown

Report header

If you fill in different info, you will override Site info settings. Good for agencies with many boards/locations

Can change logo too if one is different for other board

Office Members

Each meeting body, office member tab is key. Be sure to keep roster current

Publish media and export, these names go with it, so stay on top of it

Import meeting minutes back, need to make sure names match

Need list to show on Roll call for Minutes

Legislative File

List of leg. File types - it is a global list

Workflow Control

You can build from scratch, it is a lot of work

We recommend copying your Primary Leg. Body and adjust as needed. Saves A LOT of time!!

Force Header - yes means it always shows. No means it will only show if an item is listed in it

Sequence – good rule of thumb to use at least increments of 10 to allow for other headers to be added

3 Key Ways to Set Dependencies

1. Controlling Body - for non-primary body type!!
2. File Type
3. File Status - good to leave blank/open ended

Can layer rules for one header

Create new blank line, add level and do not force it and add new rule

Which actions do we want to be able to be used in Minutes for each Body

Choose the Standard or Default Action for each Action/File Type

Legistar global list of actions that we can take

Agenda Definitions - build out agenda layout/sections

System Security

Security Features - need to add the newly created body to the correct user group(s) so all can see it that should

It is good to wrap up on support site to show how to access articles that will help Admins get info to help in config

Advanced Settings

Can use SQL statements can be put in to override some of standard functionality, in relation to files
Can copy existing settings from one body to another

Other tab is Workflow Actions - very important

When you create a new meeting body, must tell system how to function

Look at Primary Leg. Body as a guide for Workflow Actions

System Security - Security Features

Give access to meeting bodies