

Legistar Drafting Files/Agenda Items

Overview

This quick reference guide provides instructions on how to draft an Agenda item. The drafting process in Legistar is the same for any type of legislative file or agenda item you create. Within the Legistar workflow, anyone who drafts files and creates agenda items is called a “drafter”.

Step 1: Create a new Agenda item

1. Click **Files** from the left menu to open the **Files** module.
2. Click **New**.
3. The **File ID** field will automatically populate and changed later if applicable.
4. The **Type**, **Status**, and **In Control** field's auto-populate with default settings. Change the **Type** field when applicable. The **File Created** field auto-populates with today's date, which should not be changed.
5. Select the **Agenda Date**. Click the calendar icon next to the Agenda Date field. A mini-calendar appears with green squares indicating scheduled meetings.
6. **Do not type directly into the Caption field**. This field will auto-populate by the Microsoft Word document you work with in step 2.
7. Leave the **Final Action** field blank. This field will be auto-populated later.

Legistar - Legislative Files (New Record Mode)

Save | Search | **New** | Clear | Lock | Edit | Tools | Browse | Re

EZ Text Search

File ID: TMP-0033 ID Type: **Resolution** Status: Draft

In Control: **Metropolitan Council** File Created: 6/17/2020

Caption: Agenda Date: **6/27/2020** Final Action:

Agenda Caption/Recommendation | Attachments | Associations | Details | Approval Tracking | Master History

4. Click **Save**.

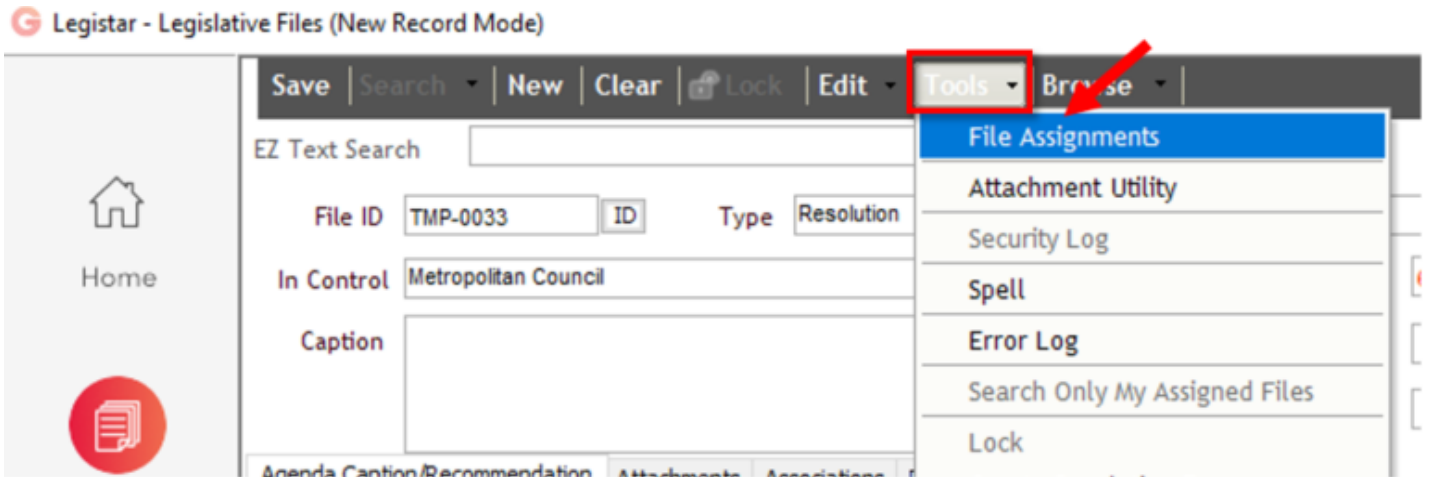
Step 2: File Assignments

Your Legistar system has File Assignments enabled. This restricts certain user groups/staff ability to see, search for, and edit Files/Agenda Items in Legistar. For example, Drafters and Approvers will only be able to search and see the details of Files/Agenda Items they created. Below shows how you give other staff access to your Files/Agenda Items.

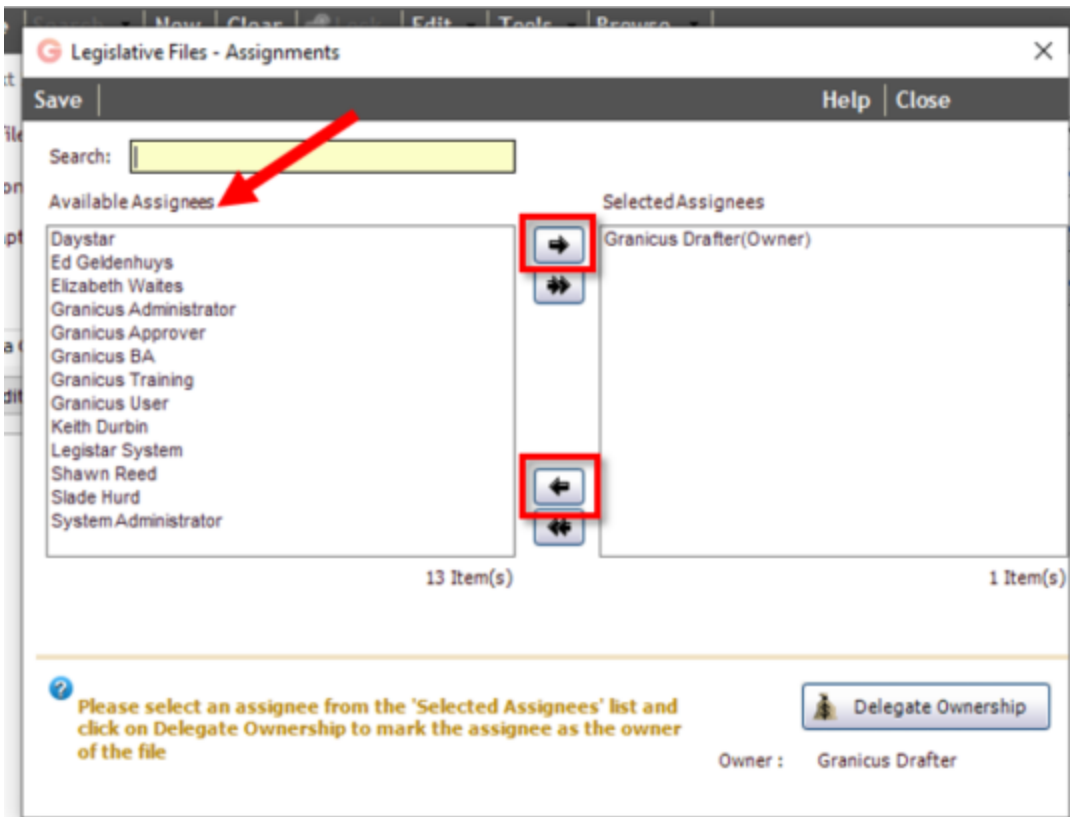
Note: Approvers will be able to see, access, and edit Files/Agenda Items when they are the current approver. Once an Approver acts, they will no longer be able to search and access the file unless the Drafter assigns them to the file.

Note, there are other security settings that may restrict staff's ability to edit.

1. Click **Tools** at the top then select **File Assignments**.



2. In the File Assignments window select users from the left **Available Assignees** column, then click the center **Right Angle Arrow** to move the user to the right **Selected Assignees** column.
3. **Note:** Keep yourself as the (**Owner**) and do not **Delegate Ownership** to another user. Delegate Ownership assigns someone else as the owner and you'll no longer be able to manage assignees.

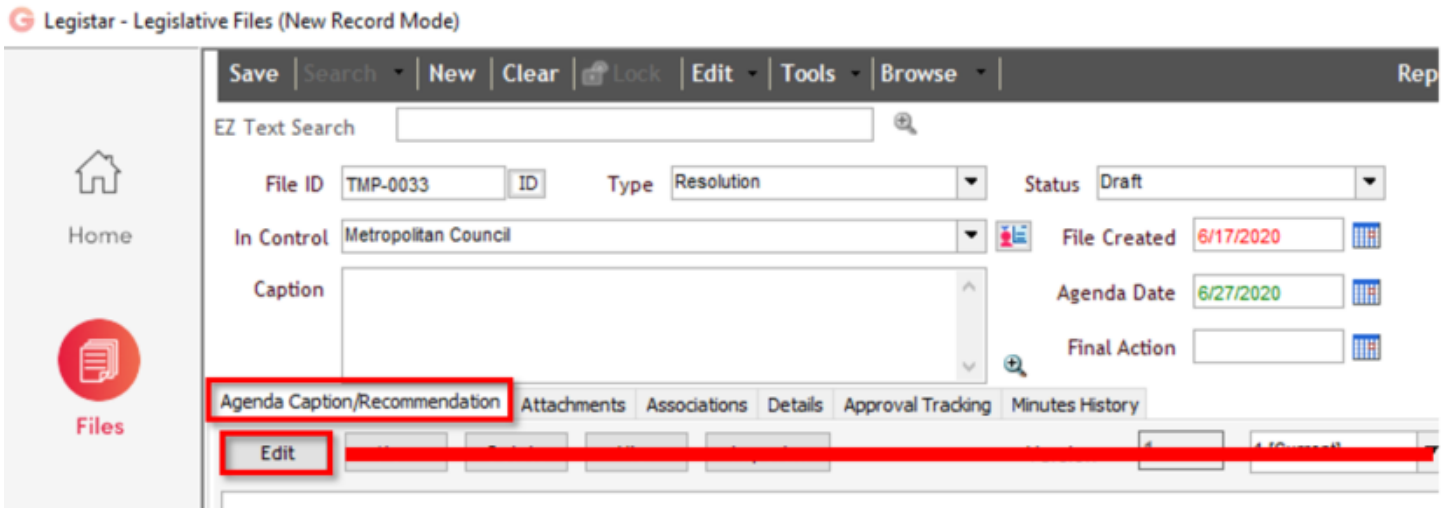


Step 3: Agenda Caption/Recommendation Tab

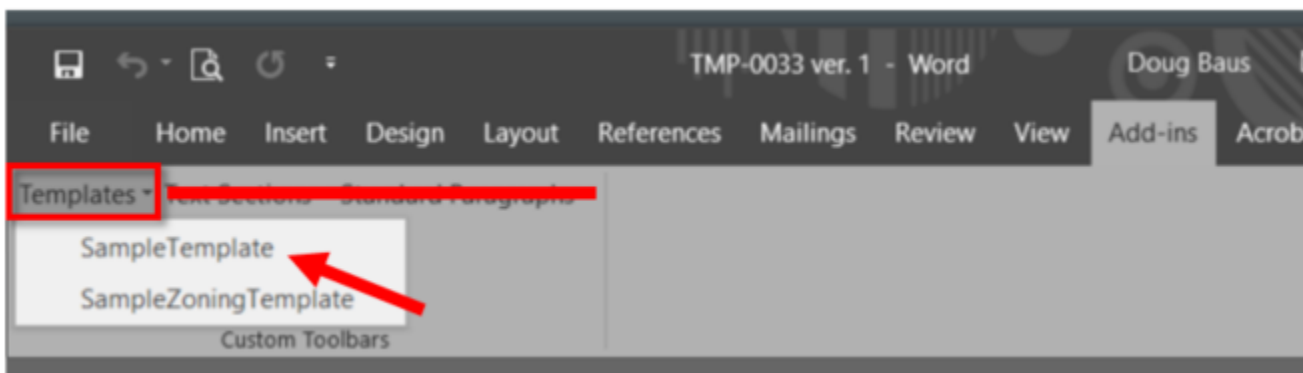
The **Agenda Caption/Recommendation** tab displays the text of the Agenda item. The following steps explain how to enter file text by accessing a Microsoft Word document template designed by your core

team. For certain Legistar reports to pull in data properly, the Microsoft Word document template is specifically formatted.

1. On the same screen as above click the **Edit** button. Microsoft Word opens.
2. Please notice the red line and at this time do not use the New or Delete buttons. If applicable they will be used later in the process. Also, Disregard and do not use the View and Import buttons as your current workflow does not use those options.



3. Once Microsoft Word opens click the **ADD-INS** tab at the top right.
4. Next click **Templates** at the top left and select the appropriate template, in this case "Sample Template". The template name "Sample Template" may change later and there may be additional templates.
5. Please disregard the Text Sections and Standard Paragraphs options, which are crossed out below.



6. Once the template loads please **Do Not edit or manipulate any of the words that have a dot dot. For example: ..title, ..body, ..agenda analysis**
7. Enter information in the applicable fields.
8. Click the small **Save** icon at the very top left.
9. Click the **X** at the very top right to close Microsoft Word and return to the Legistar screen.
10. The Word document you filled out will load into Legistar. You will now see the **Caption** box populate with the subject information from the document, and the lower window allows you to view the entire agenda item text (see screenshot below).
11. If changes need to be made to the staff report click the **Edit** button again to make changes. Again, do not type directly into the Title box.

Save | Search | New | Clear | Lock | Edit | Tools | Browse | Rep

EZ Text Search

File ID: ID: Type: Status:

In Control: File Created:

Caption: Agenda Date: Final Action:

Agenda Caption/Recommendation | Attachments | Associations | Details | Approval Tracking | Minutes History

Edit

..title
Substitute An ordinance directing the Metropolitan Department of Public Works to complete their analysis for the reduction of vehicular speed limits on neighborhood classified streets, per the Major & Collector Street Plan of Nashville and Davidson County recommended in the 2016 WalknBike Strategic Plan, and to submit a written feasibility report with implementation to the Metropolitan Council within thirty (30) days hereof.

..body
Replace with body Text

..agenda analysis
Replace with Agenda Analysis Text

Step 4: Attachments Tab

You can add attachments of any file type, such as MS Word, Excel, PowerPoint, PDFs, Text Files, Images. We recommend a maximum file size of 100MB and anything larger should be compressed or split into multiple files. Attachments that are too large may cause issues when the Clerk's office generates the agenda packet. The public may also have difficulty opening large attachments.

Warning! Attachment names should never include special characters (such as #, \$, or ^). Attachment names will appear as hyperlinks on the agenda.

1. Click the **Attachments** tab, located next to the Agenda Caption/Recommendation tab.
2. To attach a document click **Attach** at the bottom left-hand corner of the window, locate the file for import, and click **Open**. The file is now attached to the agenda item. For more options, click the **Attach dropdown arrow**, and continue to the next step.
3. You can rename the attachment by entering the new name in the **Name** field and then clicking the **Update Attachment Details** tab at the bottom left of the screen.
4. For each attachment leave the **Print With Agenda P** and **Show On Internet** boxes checked. Unchecking will exclude the attachment in the Agenda Packet and on the public Insite page.
5. To delete an attachment, select the attachment and click **Remove** at the bottom left.
6. To open an attachment, you can double click it, or select the attachment and click **Launch** at the bottom left.
7. To replace an attachment, select in the grid then click the **Replace** button.
8. **Internal Notes** do not print on the published agenda or show on the public facing Insite page. It is

internal to the agenda item only.

The screenshot shows a software interface with a tabbed menu at the top: 'Agenda Caption/Recommendation', 'Attachments (2)', 'Associations', 'Details', 'Approval Tracking', and 'Minutes History'. The 'Attachments (2)' tab is active. Below the tabs is a table with two columns: 'Sort' and 'Attachments'. The table contains two rows: '1 Resolution' and '2 US Map.png'. To the right of the table are three buttons: a tree icon, an up arrow, and a down arrow. Below these buttons are two more buttons: a download icon and an 'Attached On' button. To the right of the 'Attached On' button is a 'Time' button. Below these buttons are two more buttons: a 'File Type' button and a 'File Size' button. To the right of the 'File Type' button is a 'File Size' button. Below these buttons is a 'Name' button. To the right of the 'Name' button is a text input field containing 'Resolution'. Below the 'Name' button is a text area labeled 'Internal Notes' containing the text 'These are internal notes and not visible to the public.' Below the 'Internal Notes' text area is a 'Print With Agenda P' checkbox and a 'Show On Internet' checkbox. Below the checkboxes is a PDF icon. At the bottom of the interface is a status bar with the text '[DOUGB-9MVLNC2]C:\Users\doug.baus\OneDrive - Granicus\Granicus\Sample Training Docs\Sample Resolution City C'. At the very bottom is a toolbar with buttons: 'Attach', 'Launch', 'Replace', 'Remove', and 'Update Attachment Details'.

Sort	Attachments
1	Resolution
2	US Map.png

Buttons: [Tree Icon], [Up Arrow], [Down Arrow], [Download Icon], [Attached On], [Time], [File Type], [File Size], [Name], [Internal Notes], [Print With Agenda P], [Show On Internet], [PDF Icon]

Internal Notes: These are internal notes and not visible to the public.

Attached On: 6/17/2020 Time: 2:07 PM

File Type: DataFile File Size: 71 KB

Name: Resolution

Print With Agenda P [X] Show On Internet [X]

[DOUGB-9MVLNC2]C:\Users\doug.baus\OneDrive - Granicus\Granicus\Sample Training Docs\Sample Resolution City C

Buttons: [Attach], [Launch], [Replace], [Remove], [Update Attachment Details]

Step 5: Associations Tab

The **Associations** tab allows you to add or reference information to the Agenda item. **Related Files** is always available and allows you to link Legistar related agenda items/files together. Indexes, Code Sections and Sponsors require your Legistar Administrators to manage the data available for your use. You will be using **Sponsors**. You will not be using Indexes and Code Sections.

1. Click the **Associations** tab.
2. Click **Edit** next to **Related Files and/or Sponsors**.
3. Select one or more items on the left from the **Available Files** list.
4. Click the **arrows** to move the files to the **Selected Files** list.
5. Click **Save**, then click **Close**.
6. **Note:** Related files will appear on your public-facing Insite page as hyperlinked File IDs.

Agenda Caption/Recommendation Attachments **Associations** Details Approval Tracking Minutes History

Code Sections (0) [Edit](#)

Indexes (0) [Edit](#)

Sponsors (1) [Edit](#)

Allen, Burkley

Related Files (1) [Edit](#)

BL2019-013 - An Ordinance to amend Secti

Step 6: Details Tab

The **Details** tab contains additional information about the Agenda item. Please disregard the Agenda Number, Effective Date, and Confidential check box. Other staff will fill those in if applicable.

7. Select your **Department** if not already pre-populated.
8. The **Entered by** field should auto-populate with your email address. If not enter your email address and contact your Legistar Administrator.
9. **Internal Notes** do not print on the published agenda or show on the public facing Insite page. It is internal to the agenda item only.
10. Leave the **Not Viewable Via Insite** checked. The system will take care of the box when the agenda is published. This box may be greyed out depending on your system permissions.
11. The system will assign an **Agenda Number** automatically if applicable.
12. Effective Date may be entered at any time when applicable.

Agenda Caption/Recommendation Attachments (2) Associations **Details** Approval Tracking Minutes History

☒ Not Viewable Via InSite

Department **County Clerk**

Entered by granicus.drafter@outlook.com

Internal Notes These are internal notes and not visible to the public.

Agenda Number

Effective Date

Last Edit Wednesday, June 17, 2020 at 02:05 PM (Granicus Drafter)

Step 7: Approval Tracking Tab

1. Click the **Approval Tracking** tab.
2. Click **Add Sequence** located at the bottom left of the screen.
3. **Select** the appropriate approval sequence from the list. Note: in the future your Legistar Administrators may choose to filter approval sequences by Department.

Agenda Caption/Recommendation Attachments (2) Associations Details **Approval Tracking** Minutes History

Requester: Granicus Drafter

Seq #	Approver Name	Due Days	Action Type	Email Temp
-------	---------------	----------	-------------	------------

Approver Name :
Action Type :
Email Template :
Due Days : 0

< >

- Add Sequence -
- Add Sequence -
Administrative Legislation (finance)
Administrative Legislation (non-finance)
zzOnline Training

Save As Start Cancel Escalate 0 of 0 New Manage Approver Approver Action Search

4. Once the sequence loads, it will contain the list of approvers for this agenda item.
5. Click **Start** (screenshot below)

Agenda Caption/Recommendation Attachments (2) Associations Details **Approval Tracking (3)** Minutes History

Requester: Granicus Drafter

Seq #	Approver Name	Due Days	Action Type	Email Template
01	Granicus Approver	2	Approver	Individual Review Request
02	Granicus Administrator	3	Approver	Individual Review Request
03	Elizabeth Waites	0	FYI	FYI Notification

Approver Name : Granicus Approver
 Action Type : Approver
 Email Template : Individual Review Request
 Due Days : 2

- Add Sequence - Save As **Start** Cancel Escalate 1 of 3 New Delete Manage Approver Approver Action Search

Step 8: Creating a new Version of the Agenda Item

Legistar allows you to track different versions of an agenda item. **The current version is used when the agenda item/file is added to the agenda.**

Note: If an Approval Sequence is in process for the agenda item/file, a New Version **cannot** be created until the approval sequence is completed or cancelled. Also, if the approval workflow has completed, the agenda item/file will be locked, and someone with the appropriate permissions will need to "**Unlock**" the agenda item/file before a new version can be created.

1. Open the agenda item/file and select the **Agenda Caption/Recommendation** tab then click the **New** button.

Save | Search | New | Clear | Lock | Edit | Tools | Browse | Rep

EZ Text Search

File ID: TMP-0033 ID Type: Bill (Ordinance) Status: Draft

In Control: Metropolitan Council File Created: 6/17/2020

Caption: Substitute An ordinance directing the Metropolitan Department of Public Works to complete their analysis for the reduction of vehicular speed limits on neighborhood classified streets, per the Major & Collector Street Plan of Nashville and Davidson County recommended in the 2016 WalknBike Strategic Plan, and to submit a written feasibility report with implementation to the Metropolitan Council within thirty (30) days hereof. Agenda Date: 6/27/2020

Final Action:

Agenda Caption/Recommendation Attachments Associations Details Approval Tracking Minutes History

New

..title
Substitute An ordinance directing the Metropolitan Department of Public Works to complete their analysis for the reduction of vehicular speed limits on neighborhood classified streets, per the Major & Collector Street Plan of Nashville and Davidson County recommended in the 2016 WalknBike Strategic Plan, and to submit a written feasibility report with implementation to the Metropolitan Council within thirty (30) days hereof.

..body
Replace with body Text

..agenda analysis
Replace with Agenda Analysis Text

2. Click **Yes** at the prompt to copy the current file's content to the new version of the file. Select No if you want to start with a blank new version of the file.
3. After clicking yes the Microsoft Word template will open and you can make edits to the new version, or just close the Word template if no changes need to be made

Save | Search | New | Clear | Lock | Edit | Tools | Browse |

EZ Text Search

File ID: TMP-0033 ID Type: Resolution Status: Draft

In Control: Metropolitan Council File Created: 6/17/2020

Caption: First [or Second or Third] Amendment to Agreement [or Contract] with [full legal name of entity] for [description of project or services]. Agenda Date: 6/27/2020

Final Action:

Agenda Caption/Recommendation Attachments Associations Details Approval Tracking Minutes History

New

Legistar5

You are changing the version of the file to 2.
Do you want to copy the current file's text to the new version?

Yes No

4. Confirm the version field changes to reflect the new version, i.e. (Current)..

Agenda Caption/Recommendation Attachments Associations Details Approval Tracking Minutes History

Edit New Delete View Import...

Version 2 2 [Current]

..title
Substitute An ordinance directing the Metropolitan Department of Public Works to complete their analysis for the vehicular speed limits on neighborhood classified streets, per the Major & Collector Street Plan of Nashville and I County recommended in the 2016 WalknBike Strategic Plan, and to submit a written feasibility report with implemen recommendations to the Metropolitan Council within thirty (30) days hereof.

..body
Replace with body Text

..agenda analysis
Replace with Agenda Analysis Text

Step 9: Searching in the Files Module

Note: Searching may be limited based on user group permissions set by your designated Legistar Administrators.

1. You must be in Search Mode before you can locate a file; click the **Clear** button at the top of the screen at any time to return to Search Mode. This does not delete information, it simply removes all the information from the fields and sets you to search mode.
2. Enter search criteria in any of the fields at the top of the screen (e.g., Agenda Section, Status, Dept/Agency, Agenda Date...).
3. Click **Search**. If there is more than one record found, click **Yes** to display all records.
4. Click a record in the list to open it.

EZ Text Search:

Enter keywords in the **EZ Text Search** field. Click the magnifying glass icon to open a text box for further defining your search. EZ Text Search only searches through legislative file text fields, and also the text and titles of attachments; drop-down and date fields are not searched. Also, EZ Text only pulls up exact phrases to your search text.

Date Range and Wild Card Searching:

Within the Search menu in any Legistar modules, you can use the following date range search tools alone or in conjunction with the date entry shortcuts:

Item

Description

>

Enter ">" before a date, i.e. ">1/1/2013" to find a date greater than or after the entered date or number.

Enter "<" before a date, i.e. "<1/1/2013" to find a

<

date less than or before the entered date or number.

*

Enter an asterisk * at the end of the search term to only search for records that return results beginning with the search term. For example, enter 102*.

?

Enter in place of a character when you are searching for more than one spelling of a term, for example, "peter?n" will return Peterson and Petersen.