

Daystar Computer Systems, Inc.

Legistar 5.0 Drafter Manual

Guide to Legistar 5.0 for Drafters



L E G I S T A R TM

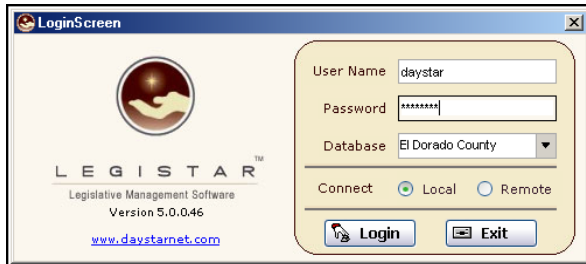
Legislative Management Software

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HOW TO DRAFT FOR APPROVALS

I. LOG INTO LEGISTAR

1. Log into Legistar using your Username and Password.



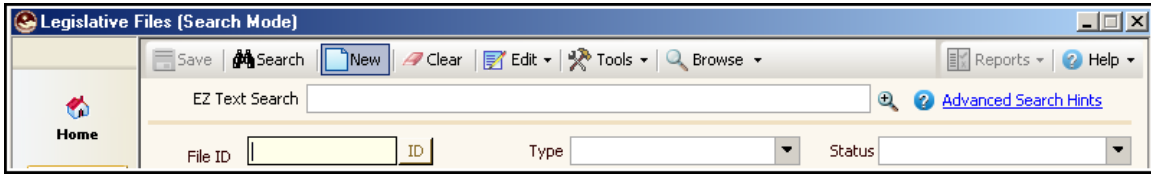
- To change your password, do the following:
 - Click on Tools
 - Local Settings
 - Password
 - Follow instructions to change password

II. HOW TO DRAFT RESOLUTIONS, ORDINANCES, ETC.

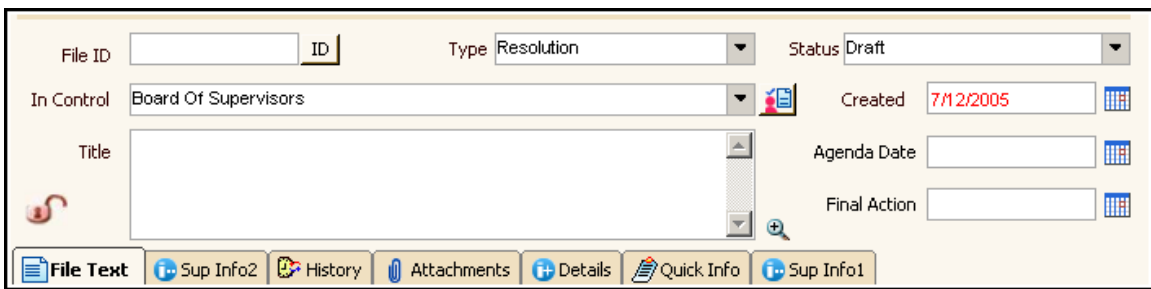
2. With Legistar's main menu displayed, select "Legislative Files." (Indicated by the arrow)



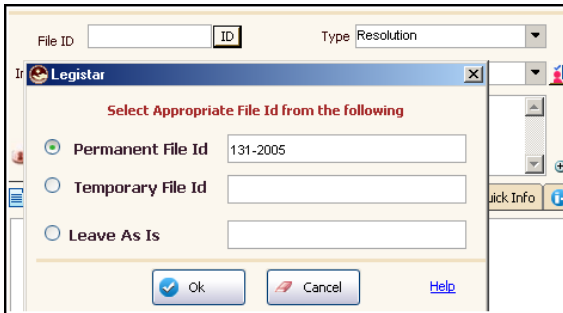
3. On the “**Legislative Files**” window, click on the “**New**” button located near the top of the window.



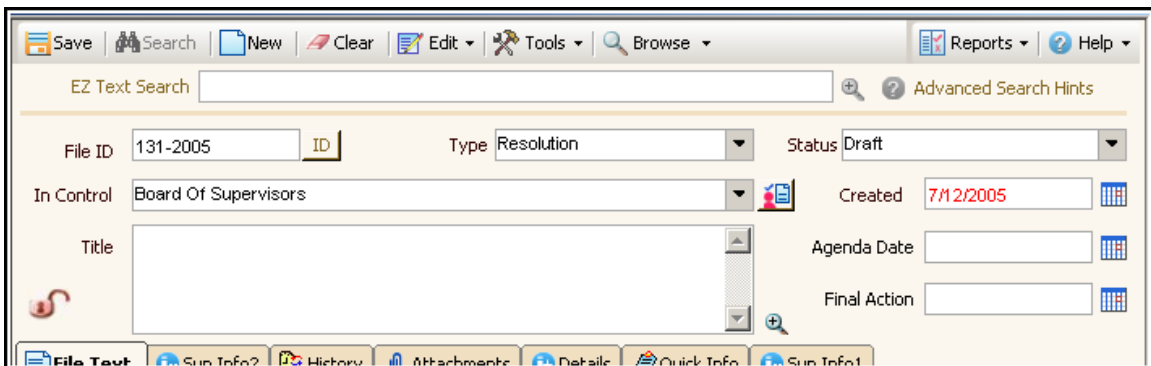
4. Several system defaults will now populate your screen in an effort to save time during file entry. Default File Type, File Status, and Controlling Body selections can be set-up for each Legistar user. The Default File Status is “Draft.” Changing this status will not affect your item placement on the agenda as the status will automatically change through the approval process.



5. Select the file type. This field describes what sort of Legislation you are to begin drafting. After choosing your file type, select the File ID button and choose “**Permanent File ID**”. *At this point, the system will assign a permanent number for tracking purposes only. (This is not a resolution number.)*



FIELD LABELS

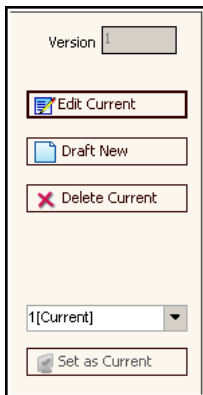


6. **STATUS** – The **Status** field is used to identify where the Legislation is in the Legislative Process. In this instance, the system defaults to “Draft” because the file is currently being created. The Status is also a vital part of the Legislative File because it is used to establish the agenda definitions table, which dictates the agenda order.
7. **CONTROLLING BODY** – The **Controlling Body** field will highlight which legislative body is currently in possession of the file. This field will automatically change when actions are taken which call for a change in possession. This field is also used to determine agenda order.
8. **FILE CREATED DATE** – The **File Created Date**, is the date in which the file was created in Legistar. This date can be manually changed.
9. **AGENDA DATE** - Users may enter the agenda date to direct a legislative file to appear on one specific agenda, OR on the next Agenda after a specific date.
10. **FINAL ACTION DATE** – The “**Final Action**” field will display the date of final passage or defeat by your Council or Commission. **PLEASE DO NOT** enter information into this field.
11. **TITLE** - The “**Title**” field on the “Legislative Files” screen will be automatically populated with text you will input later in the “..Title” section of the “**Text File**” field. Therefore, please **do not** input information directly into this field.

FILE TEXT TAB - The **File Text Tab** is the legal documentation of the Legislative file. The text editor allows users to do their drafting and formatting within Legistar. The following steps outline the drafting Process.

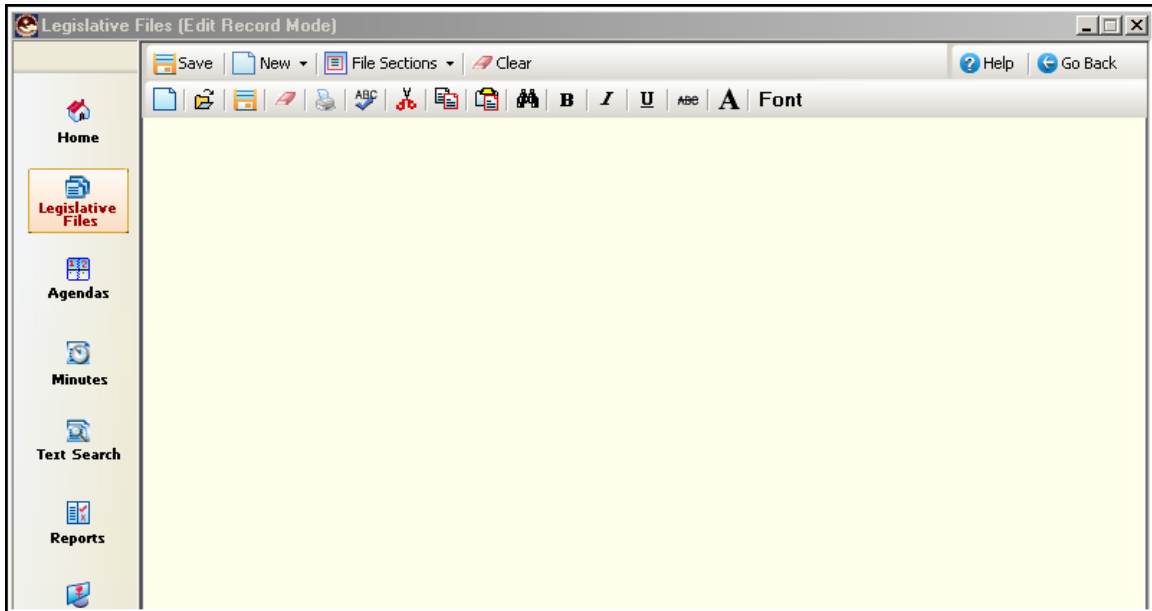
12. To input file information, click on the “**Edit Current**” button. This will open a text input box on the right side of your screen.

Edit Current Button



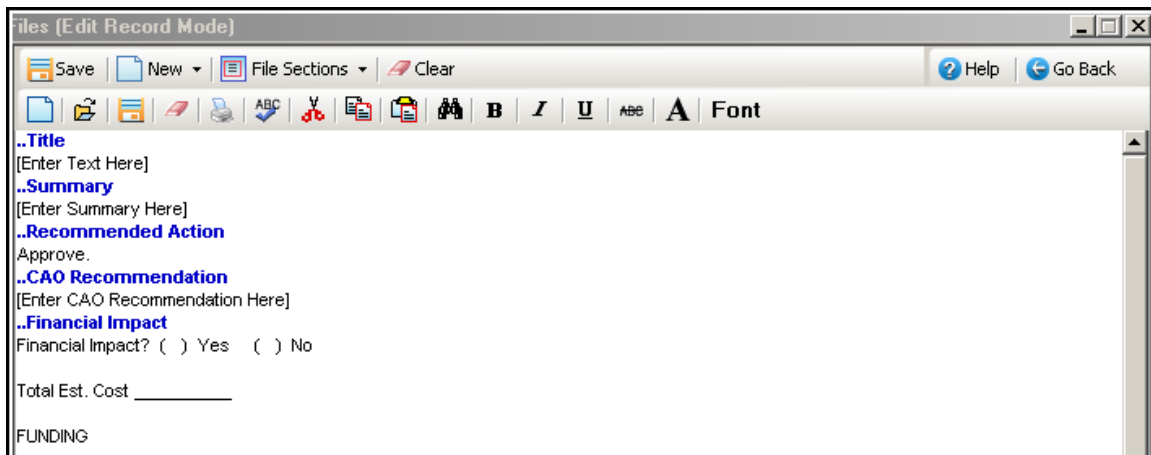
Text Input Box

13. Click on the “New” button and a generic template will appear.



14. IMPORT AN EXISTING DOCUMENT OR USE A TEMPLATE TO CREATE A NEW DOCUMENT

In this screen, you can do one of two things: 1) Import your file from MS Word (rtf) or 2) Insert a Template and type corresponding text into the Files screen.



a. To Import the document:

- i. Click the down arrow next to the New button
- ii. Select Import
- iii. Go to your u:drive and select the document you want to import.

Note: Be sure that the document you are importing has been saved as .rtf and is in the new format:

- .. Title
- .. Memo
- .. Staff
- .. Body

b. To use a Template:

- i. Click the down arrow next to the File Sections button.
- ii. Select Resolution, Ordinance or Info Item

- iii. Without tabbing (Tab Key) or indenting, simply type the corresponding information directly below the appropriate ..section. The .. are used to define different text sections, and to determine output on certain Legistar Reports. If desired, you may run spell check prior to clicking close to ensure correct spelling.

Note: All ordinance language will be added as an attachment (see page 5 for attachment instructions). You will still need to enter your **..Title** and **..Memo** in Legistar. Ordinance templates are included in the appendix.

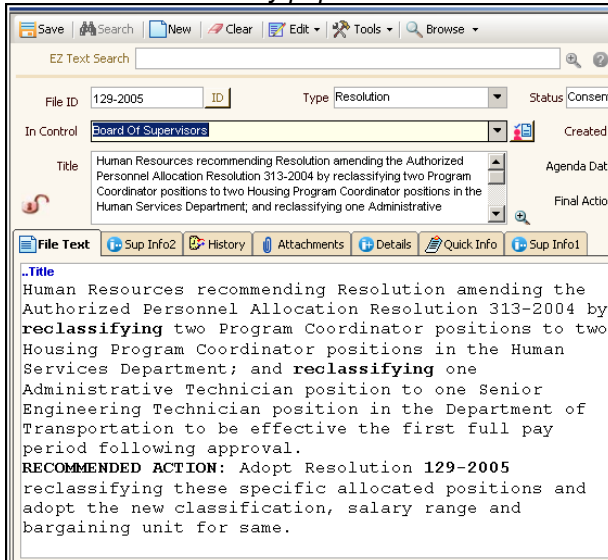
Spell Check



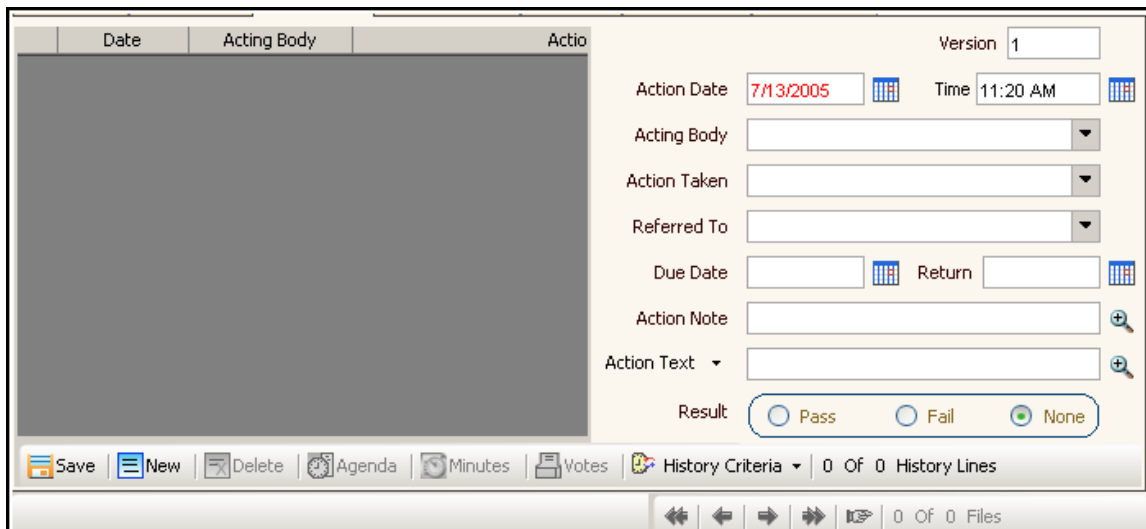
15. Click **“Save”** and then **“Go Back”** to save information to the file.

- After clicking **“Go Back,”** the application will save information to the file and return you to the main **“Legislative Files”** screen.

*You will also notice that whatever information was typed directly below **..Title** in the **“File Text”** box automatically populated the **“Title”** field.*



HISTORY TAB – This tab will keep a record of all the meetings this file has appeared on, the actions taken on this file, as well as the votes and any discussions recorded on your Meeting Minutes. During the drafting process, this field should remain blank.



ATTACHMENTS TAB – Supporting Documentation will be added on this tab.

16. ATTACHMENT NAME – This is the name of the attachment. You will see the attachment name in the Attachments box on the left and the Attachment Name field on the right.

17. DESCRIPTION – This field allows for free text typing describing each individual attachment.

18. EXPIRATION DATE – If an attachment is no longer valid after a certain date, users can place that information here. **Note:** Attachments WILL NOT be automatically removed, this is just a descriptive field.

19. PRINT THIS ATTACHMENT WITH REPORTS – Checking this field will allow the attachment to print with certain Legistar Reports.

20. SHOW THIS ATTACHMENT ON INTERNET REPORTS – Checking this field will create a link to this attachment on Internet reports.

Note: Both the “Print This Attachment with Reports” and “Show This Attachment On Internet Reports” are checked by default. If you do not want a particular attachment to print or show up on the internet, you must uncheck these boxes.

The screenshot displays the Legistar Attachments management interface. On the left, there is a table with two columns: 'Sort' and 'Attachments'. To the right of the table are several input fields: 'Name', 'Description', 'Expiration Date', 'Attached On', 'Time', 'File Type', and 'Size'. Below these fields are two checkboxes: 'Print This Attachment With Reports' and 'Show This Attachment On Internet Reports'. At the bottom of the interface is a toolbar containing buttons for 'Import', 'Launch', 'Remove', and 'Update Attachment Details'. An arrow from the left points to the 'Import' button.

21. ADDING AN ATTACHMENT

- Click the Import button located at the bottom left side of the screen.
- Double click on file located in your u:drive
- The document is now attached.

Note: When naming the attachments, please use the following format:
Name of Subject, File Type, Date if necessary (see examples below)
Ex.1, Beck Annexation Planning Minutes – 2007-06-12
Ex.2, Cogsdale Contract
Ex.3, Dog Park Ordinance
Ex.4, Beck Annexation Aerial Photo and Map

22. RENAMING AN ATTACHMENT – An attachment CAN be removed once it has been brought into Legistar by typing a new name in the Attachment Name field and clicking on the Update Attachment Details button.

DETAILS TAB – These fields can help provide more specific information about the file.

The screenshot shows a web form with the following fields and controls:

- Name: Text input field with a search icon.
- Requester: Dropdown menu.
- Contact: Text input field with a search icon.
- Notes: Large text area with a search icon.
- Agenda Number: Text input field with a search icon.
- Enactment Number: Text input field with a search icon.
- Next Meeting Body: Dropdown menu.
- Reference: Text input field with a search icon.
- Cost: Text input field with a currency icon.
- Hearing Date: Calendar icon.
- Enactment Date: Calendar icon.
- Next Meeting Date: Calendar icon.
- Not Viewable Via Web: Checked checkbox.
- Last Edit: Button with a document icon.
- Timestamp: Thursday, July 14, 2005 at 10:51 AM (Daystar)

23. FILE NAME - The “**File Name**” field is an indexing tool. This is a required field. This field should be used similarly to the email subject line in the old agenda submittal process. Be sure to include the Agenda Date and give a brief description of item in this field. e.g. 9/24/07 – Beck Annexation.

24. REQUESTOR - Use of the “**Requester**” field represents the Service Area/Unit that requested that this legislation be drafted. This is a required field.

25. CONTACT – Enter your Service Area Administrator or other contact name as directed by your Area. This is a free text field so you type this information directly into the field. This is a required field.

26. NOTES - The “**Notes**” field is provided as a communication tool. Input notes you may want the approver or others to know about the item here.

27. DRAFTER – Enter the preparer’s name or other contact as directed by your Area. This is a free text field so you type this information directly into the field. This is a required field.

28. COST - If a cost is associated with the proposal in the legislation, please enter the **total** amount into the “**Cost**” field. Please enter “0” if there is not associated cost. This is a required field.

29. HEARING DATE – If a public hearing date is associated with this item, you may enter the date in this field. It is for reference only.

The remaining fields in the Details Tab are for City Clerk’s Office use only. **DO NOT ENTER** information in these fields.

ASSOCIATIONS TAB – This tab provides users with an easy way to index and reference their legislation. These fields perform an EITHER search, meaning that the more information placed in these fields, the more results you will likely receive. These are the only fields on the Legislative Files Screen to work in this manner.

The screenshot shows a web interface with four distinct sections arranged in a 2x2 grid. Each section has a title, a count in parentheses, and an 'Edit' button with a small icon. The sections are:

- Code Section (0)**: Top-left section with a document icon.
- Indexes (0)**: Top-right section with a list icon.
- Sponsors (0)**: Bottom-left section with a person icon.
- Related Files (0)**: Bottom-right section with a link icon.

 Each section contains a large, empty rectangular box for data entry.

30. CODE SECTIONS – This section allows the users to attach related code sections to a File. The Code Sections are used to reference our City Code.

31. INDEXES - An Index is used to reference a Legislative File to a certain topic.

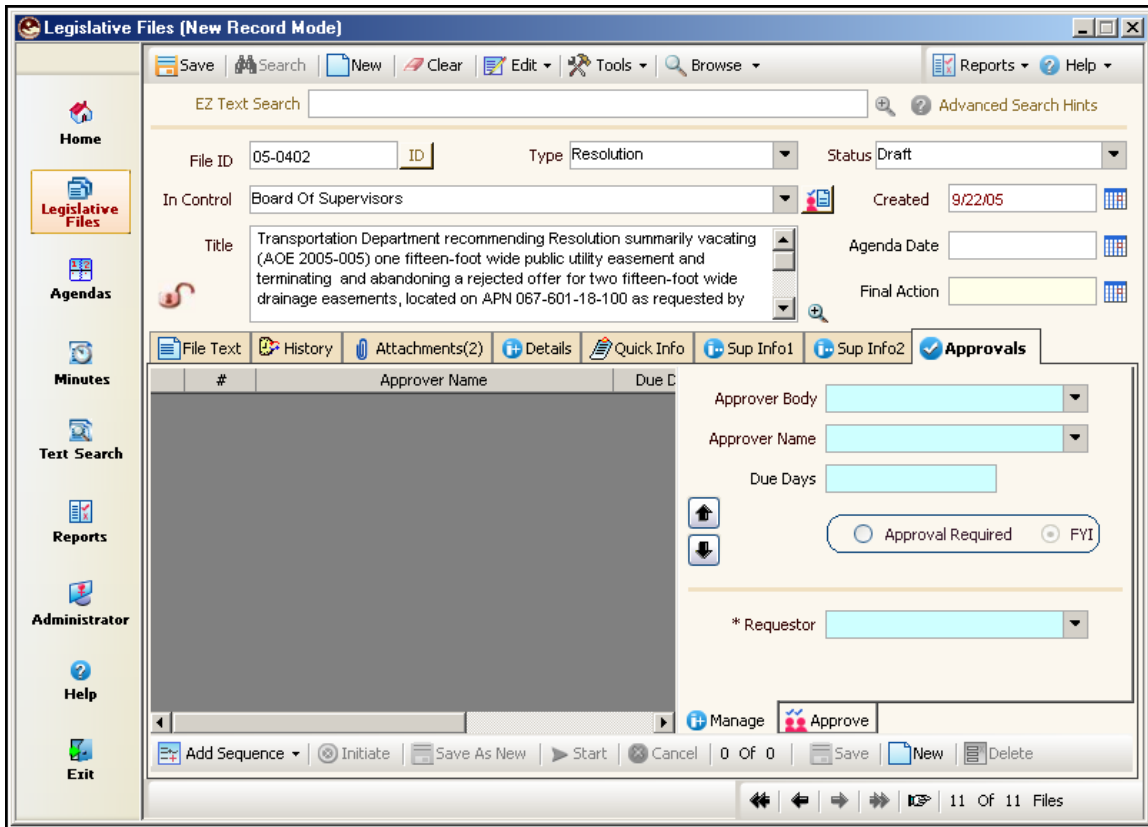
32. SPONSORS – The **Sponsor** is the individual Councilmember or a number of Councilmembers that represents an active stand regarding the legislative File. A Legislative File can have several sponsors.

33. RELATED FILES – This field is used to highlight a relationship between Legislative Files.

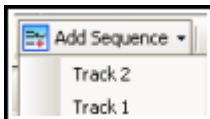
NEW INFO 1 & 2 TABS – These fields are intended for future use by the City Clerk’s Office. Please do not enter information in these fields.

The screenshot displays two columns of input fields. The left column contains five text input fields labeled 'Extra Text 1' through 'Extra Text 5', each with a magnifying glass icon to its right. The right column contains five date input fields labeled 'Extra Date 1' through 'Extra Date 5', each with a calendar icon to its right.

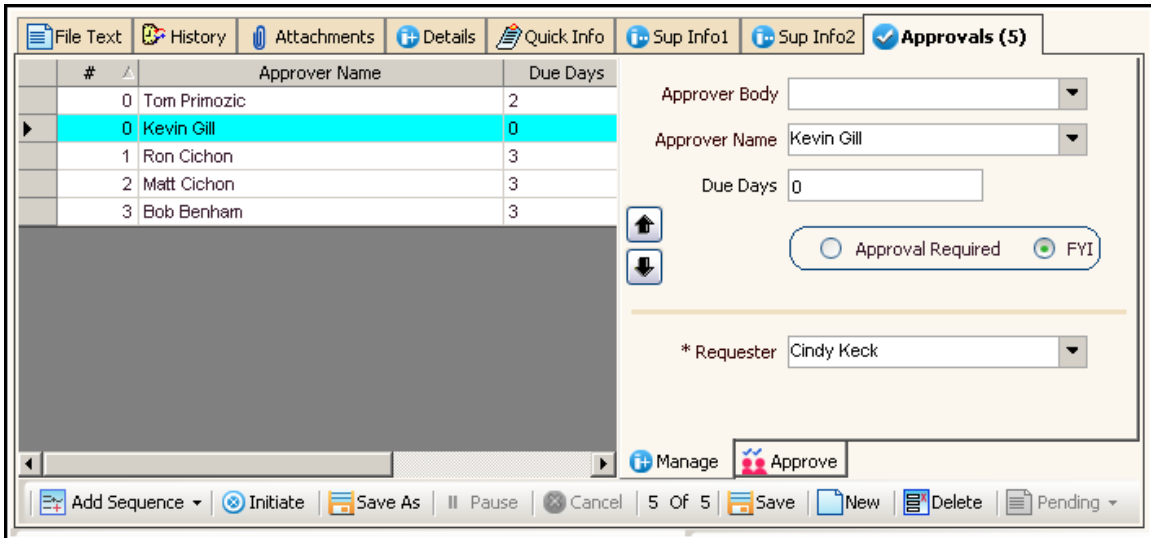
APPROVALS TAB – The **Approval Tab** is used to send, manage, review and approve Legislation prior to being introduced to a meeting body. This tab will initiate the approval process.



34. ADD SEQUENCE BUTTON – The **Add Sequence** button displays a list of Available Approvals Sequences to choose from that are unique to your Service Area.



35. Once a sequence has been chosen, the system will populate the form with the appropriate group of approvers.



36. APPROVER NAME SECTION – The Approver name field will display the names of the Approver in the chosen approval sequence. Approvers can only approve or disapprove a file on the line where their name appears.

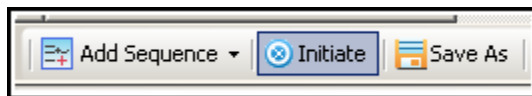
37. DUE DAYS – The number of days an approver has to log in and review the file before it would escalate to an alternate approver.

Note: Due Days are defaulted based upon the current Council Agenda deadlines. The due days can be modified if needed.

38. APPROVAL REQUIRED OR FYI – This represents the type of approver a user is. If an approver is marked as FYI, this means that the file has been passed to them for information purposes only, and that they can choose whether or not to enter information. If an approver is required, they must take an action on the file.

39. REQUESTER – This field displays the name of the Legistar user who began the approvals process.

40. INITIATE BUTTON - After the sequence has been added, the “initiate” button should be selected.



41. Once the Initiate button has been selected, the status of the file will change and it will not be editable by any users other than the approval requester and the approvers until the process has been completed. An Email will be sent to notify approvers of pending items.

Save Search New Clear Edit Tools Browse Reports Help

EZ Text Search Advanced Search Hints

File ID: 05-0448 ID Type: Resolution Status: Approval Pending

In Control: Board Of Supervisors Created: 9/30/05

Title: Consideration of a resolution to resurface two miles of North Shore Drive running north from Belmont Ave. Agenda Date: Final Action:

File Text History Attachments Details Quick Info Sup Info1 Sup Info2 **Approvals (5)**

#	Approver Name	Due Days	Escalation Date	Approval Status
0	Tom Primozić	2	11/2/05	Review Requested
0	Kevin Gill	0	10/31/05	FYI
1	Ron Cichon	3	11/3/05	Review Requested
2	Matt Cichon	3		Pending Request
3	Bob Benham	3		Pending Request

Approver Body:

Approver Name: Tom Primozić

Due Days:

Approval Required FYI

* Requester: Cindy Keck

Manage Approve