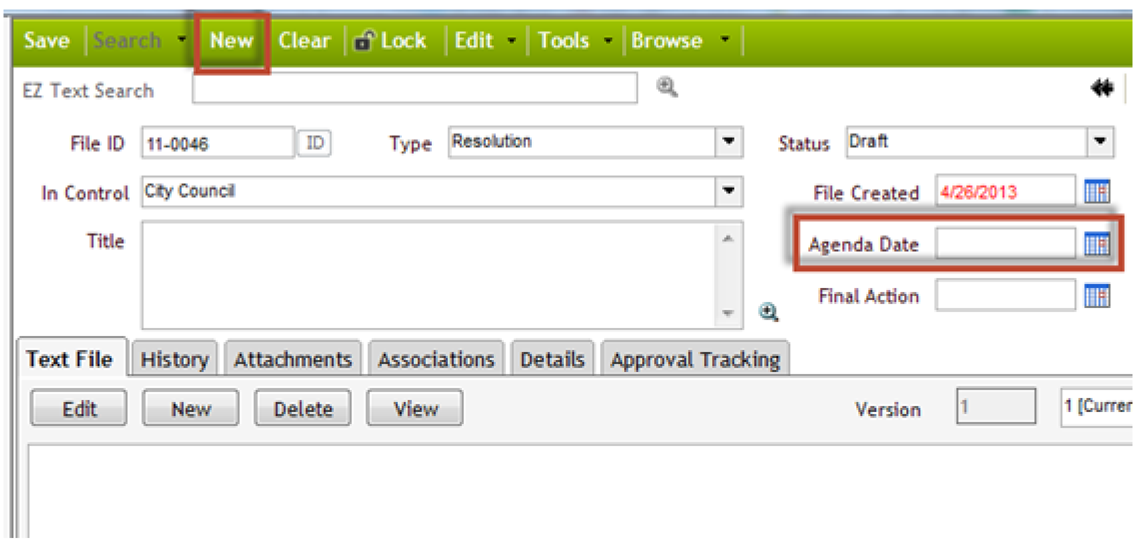
Drafting Legislative Files (Word Text Editor)

Overview

This quick reference guide provides step-by-step instructions on how to draft a legislative file. The drafting process in Legistar is the same for any type of legislative file or agenda item you create. The steps in the process listed are generic in nature and might change based on your installation. Within the Legistar workflow, anyone who drafts files and creates agenda items is called a "drafter".

Step 1: Create a new legislative file

1. Click **Files** from the left menu to open the **Files** module.
2. Click **New**. The **File ID**, **Status**, **Type**, **In Control**, and **File Created** fields auto-complete with default settings. This default content is set in Tools > Local Settings > Legislative Files.
3. Select the **Agenda Date**, if known.

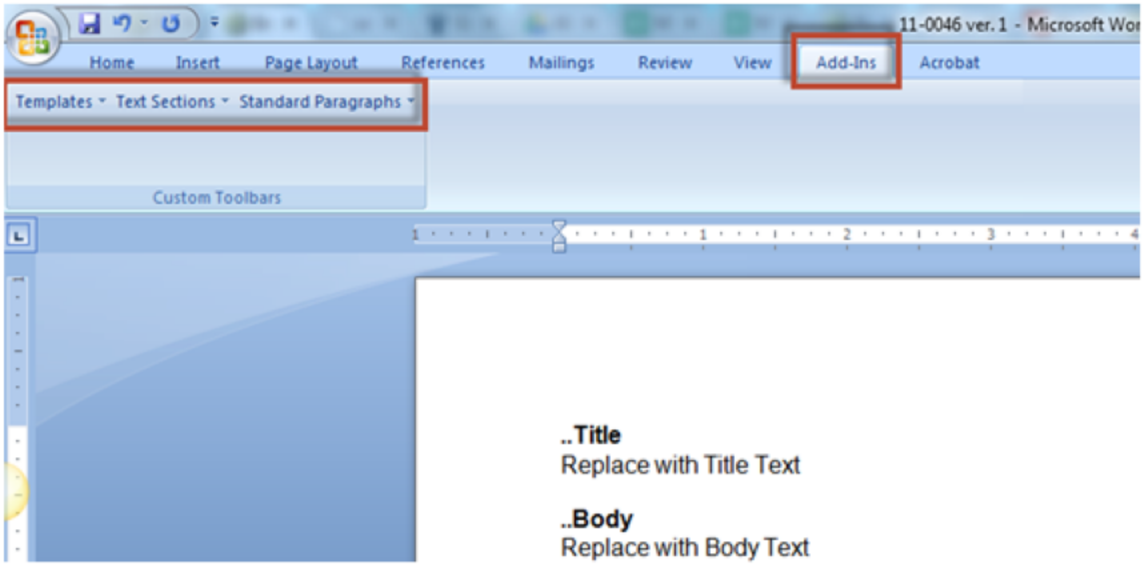


4. Click **Save**.

Step 2: Drafting legislative file text using Microsoft Word

The **Text File** tab displays the text of the legislative file. This guide explains how to enter file text using Microsoft Word.

1. Click either **Edit** (to open the legislative file) or **Import** (to import a Word document for use as your legislative file). Microsoft Word opens.
2. Locate the Legistar toolbar under the **Add-Ins** tab.



3. Select one of the following options to enter the legislative file text (the option you choose will be based on file type):
   - Click the **Templates** drop-down arrow, and select "Council Report".
   - Click the **Text Sections** drop-down arrow, and select one of the options.
   - Click the **Standard Paragraphs** drop-down arrow, and select one of the options.
4. Edit and enter additional text until your file is complete.
5. Click **Save**.
6. Click **X** to close Microsoft Word and return to the Legistar screen.

Microsoft Word Editor Limitations:

When you use Microsoft Word as your editor in Legistar, while most formatting will carry over to Legistar properly, note that it may not appear in Legistar exactly as you have entered it in Word. This applies to the following:

- Rich text format (RTF) code attributes such as bolding, font style and color, underlining, bulleted and numbered lists.
- Indentation (Best practice is to use preset tabs)
- Pictures, Tables
- The Track Changes feature, which you use to record edits

Additionally, the Word Editor has the following limitations:

- You should not insert tables, graphics or images into the text file. Our best practice recommendation is that you include them as attachments.
  - The **..Title** section cannot accommodate graphics at all. The **..Body** section can accommodate small graphics, but for better results, we recommend you insert them as attachments.
  - Word documents that you add into Legistar cannot contain larger than 3MB worth of graphic data, as graphics that have a large file size will slow down the process of uploading the word document to Legistar. Therefore, the file size for graphics should be as small as possible.
- The Preview screen under the Text File tab is the least perfect replication of your formatting in the Word document. The Text File Report offers the closest replication of the Word document. When you are in the Files module, you can run this report by clicking **Reports** and selecting the report name from the Reports menu.
- RTF code cannot be larger than 100MB (this is not related to file size)
- You cannot use footnotes in the Word Editor

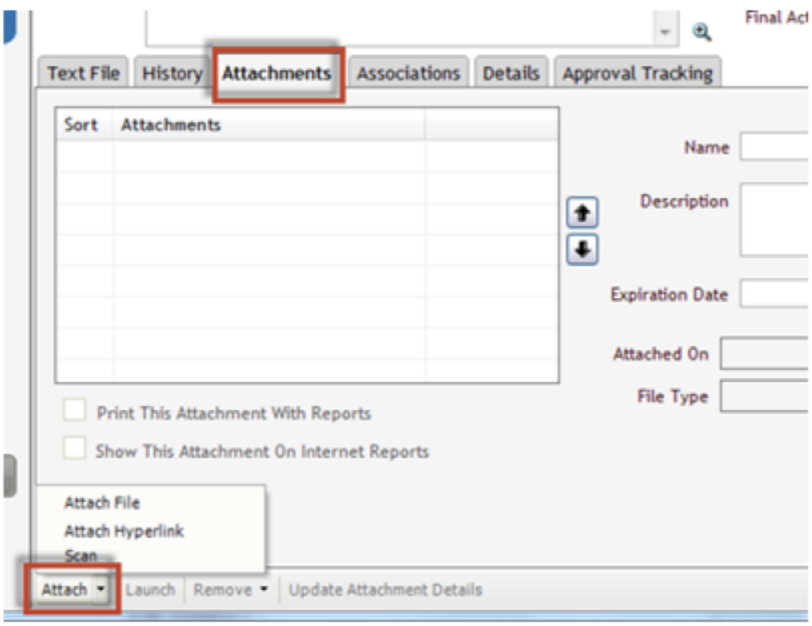
Step 3: Add attachments to the legislative file

You can add attachments of any file type and size to legislative files.

Warning! Attachment names should never include special characters (such as #, $, or ^). Remember the attachment name will be the hyper link that appears on the agenda. You may rename the attachment by entering the new name in the **Name** Field and selecting **Update Attachment Details** in the bottom of the screen.

1. Select the **Attachments** tab within the legislative files module.
2. To attach a file, click **Attach** from the bottom left-hand corner of the interface, locate the file for import, and click **Open**. The file is now attached to the legislative file. For more options, click the **Attach dropdown arrow**, and continue to the next step.

Important Note: You can also "drag and drop" attachments from your desktop directly into Legistar. You must open your documents library outside of Legistar for this function to work. If there is a Granicus logo in the document screen you can only load one attachment at a time. If there is no logo, you may drag and drop multiple files.
Select the files you want to attach, and drag and drop them onto the **Attachments** screen. The **File Size** field displays the uploading progress for each file.



3. If you select the **Attach dropdown arrow**, you can do the following:
   - **Attach File:** locate the file for import, and click **Open**.
   - **Attach Hyperlink:** enter a hyperlink in the field, and click **OK**.
   - **Scan:** select a source from the Scan option, click **OK**, enter a **Description** and **Expiration Date**, then click **Save**.

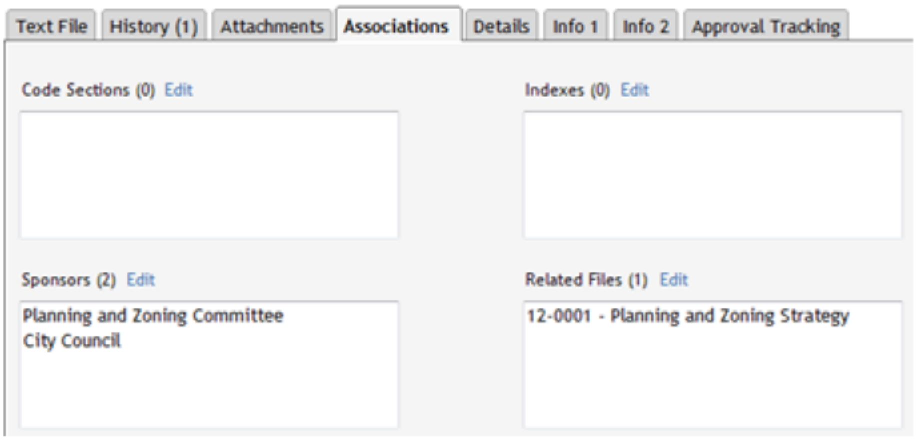
Note: If you need to delete a file, select the file and click **Remove**.

4. To open an attachment, you may double click it, or highlight it and select **Launch**.

Step 4: Add sponsors and related files to the legislative file

1. Click the **Associations** tab.

2. Click **Edit** next to **Sponsors**.
3. Select one or more sponsors from the **Available Sponsors** list.
4. Click the **arrows** to move and rearrange the sponsors in the **Selected Sponsors** list.
5. Click **Save**, then click **Close**. The selected sponsors appear in the **Sponsors** field.
6. Click **Edit** next to **Related Files**.
7. Select one or more legislative files from the **Available Files** list.
8. Click **Save**, then click **Close**. The selected files appear in the **Related Files** field. Related files will appear on your public-facing Insite page as hyperlinked File IDs under the hyperlinked attachments.



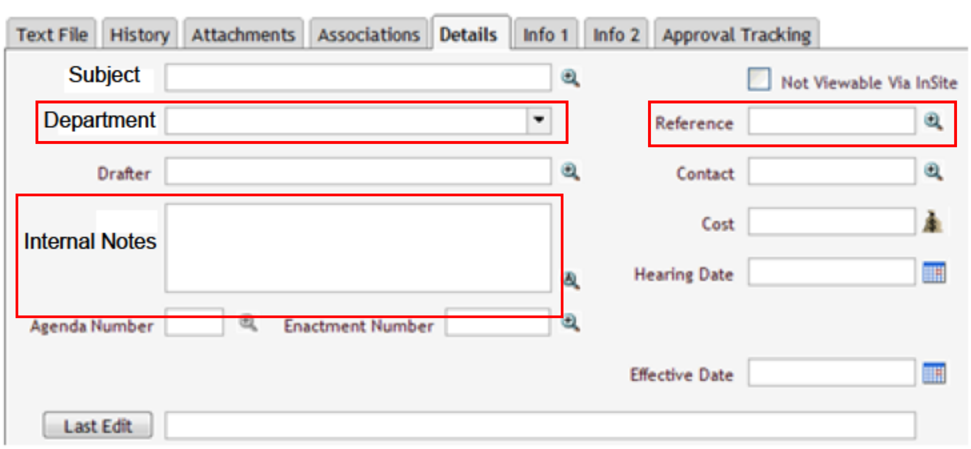
Note: You can also add code sections and indexes to the legislative file. Click **Edit** next to **Code Sections** to create new, import, and edit existing code sections. Click **Edit** next to **Indexes** to relate the file to a specific topic. You can also create new and import indexes.

Step 5: Enter information in the Details Tab

Enter a Reference Code in the "Reference" field. The reference code determines the placement of the item on the agenda.

Reference Code	Agenda Placement
HEARINGS	Scheduled Hearings and Matters
CONSENT	Consent Calendar
GEN ADM	General Administration
COUNCIL	City Council
CLOSED SESSION	Closed Session
CEREMONIAL	Ceremonial Presentations
UPCOMING HEARINGS	Upcoming Scheduled Hearings and Matters

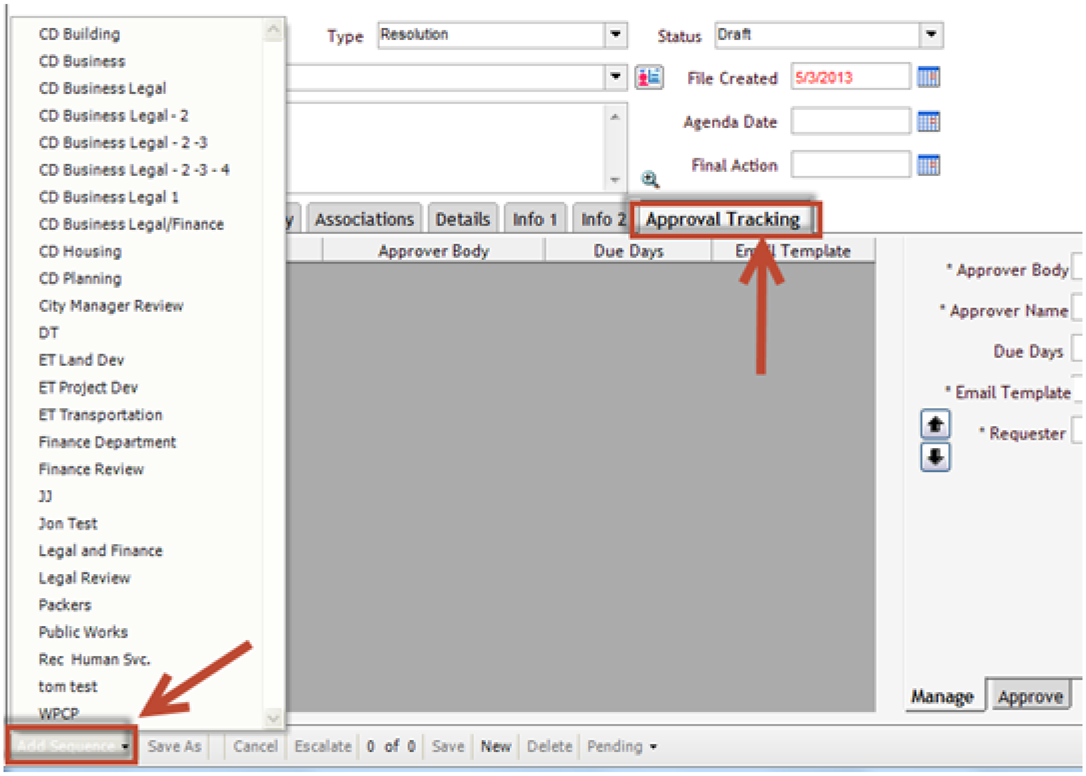
Select your Department in the "Department Field" drop down list.
Enter any notes in the "Internal Notes Field." (City attorney approved date & Hearing Times also go here)



Step 6: Create an Approval Tracking Request

Note: Skip this step if you are not using ATS.

1. Open a legislative file and verify you are in Edit Record mode.
2. Click the **Approval Tracking** tab.
3. Click the **Add Sequence** drop-down button and select an approval sequence from the menu available. This sequence contains the list of approvers for this file.



If necessary, you can add an approver to the list:

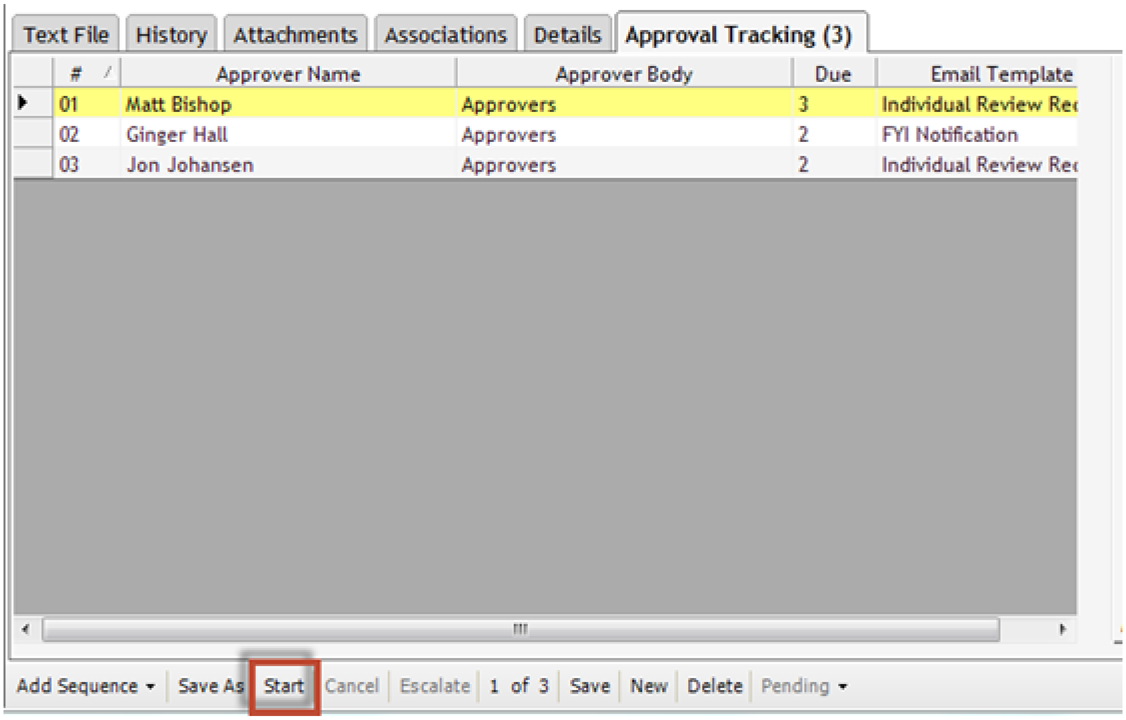
i. Click **New** on the bottom of the screen.
ii. On the right side of the screen, select an **Approver Body**.
iii. Select an **Approver Name**.
iv. Enter the number of **Due Days**.
v. Select an **Email Template**.
vi. Click **Save** on the bottom of the screen.
vii. If necessary, reorder the approvers using the up and down arrows.

Note: You can also select an existing approver and click **Delete** to remove them from the sequence if necessary.

4. Click **Start**. This does the following:

i. **Email Notification:** An email is sent to notify approvers of pending items with a hyperlink to the Approval Response Web form. The email has a standard message that your Legistar system administrator can modify.
ii. **Timestamp:** The program automatically inserts the current date and time into the **Requested Date** field. This is not editable.
iii. **Approval Status Update:** The file status changes to *ATS Review*.

Note: After you start the approval tracking process, only the approval requester and assigned approvers can edit the file until the approval process is complete.



Note: If you want to edit a file or add additional people to the approval sequence after sending it for approval, click the **Approval Tracking** tab and click **Pause** to pause the approval process. This enables you to edit the file or modify the sequence.

Step 7: Search for legislative files

Note: 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 screen so you may search again.

1. Enter search criteria in any of the fields at the top of the screen (e.g., Type, Status, In Control).
2. Click **Search**. If there is more than one record found, click **Yes** to display all records.
3. 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 or shortcut, i.e. ">1/1/2013" to find a date greater than or after the entered date or number.
<	Enter "<" before a date or shortcut, 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 13-02*.
?	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.
##/##/#### to ##/##/####	Enter "##/##/#### to ##/##/#### ", i.e. "01/01/2013 to 08/21/2013" to find a specific number of dates within the range.

>>Next: Approving Legislative Files

City Attorney Approval

Documents that require City Attorney approval must be sent to the City Attorney's Office ("CAO") with a Request for Legal Services form ("RLS"). The CAO will put a tracking number on the RLS form called the RLS number. After the City Attorney's Office has reviewed and approved the document, it will be returned to the department drafter with the RLS form.

The department drafter should open the related file in Legistar and note (i) the RLS number, (ii) the date the item was approved, and (iii) the name or initials of the attorney that provided the approval. The required information should be entered in the "Internal Notes" area found under the "Details" tab.

For example: