Granicus/Legistar Quick Reference Guide
For Drafters and Approvers

Updated 9/20/2017

Contents

Logging In / Changing Password……1

Creating a New Legislative File……..5

Drafting a New Legislative File……..7
- Details Tab……..7
- Background Tab……..8
- Attachments Tab……11
- Associations Tab……12
- Advertised Date(s) Tab……..13
- Approval Tracking Tab……..14

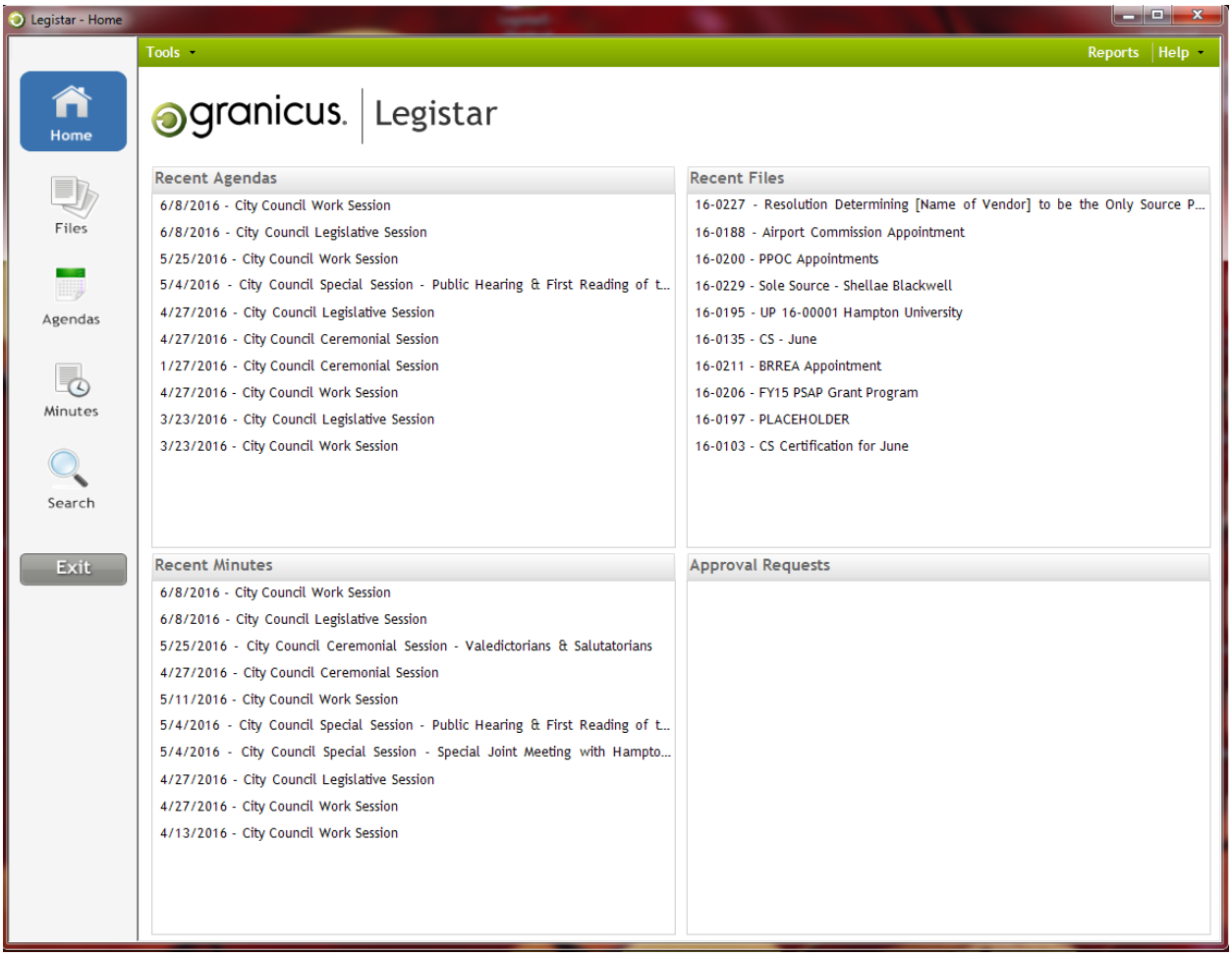
Approving a Legislative File……15

Logging In / Changing Password

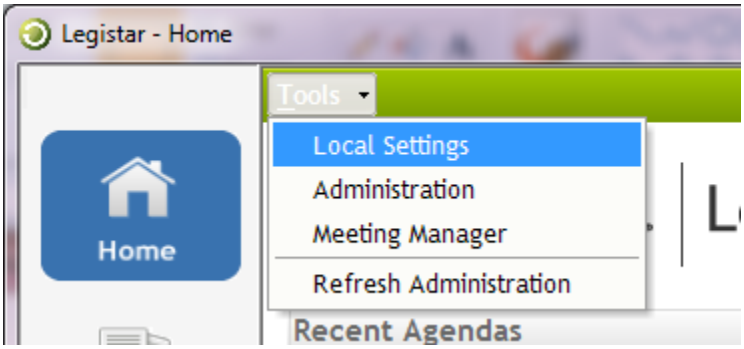
This is the Granicus/Legistar icon, located on your desktop. If you do not have this icon, please contact the Clerk of Council's Office or IT Services Helpdesk to have it added to your computer.

At the Log In screen, your username will be the same as your email handle (for most new users, this will be firstname.lastname). Your password is whatever you choose it to be, with no restrictions. You will not be required to change it at any point and may do so at your own discretion. The default is simply "password". The Database will always be "Hampton" and the Connect setting "Local".

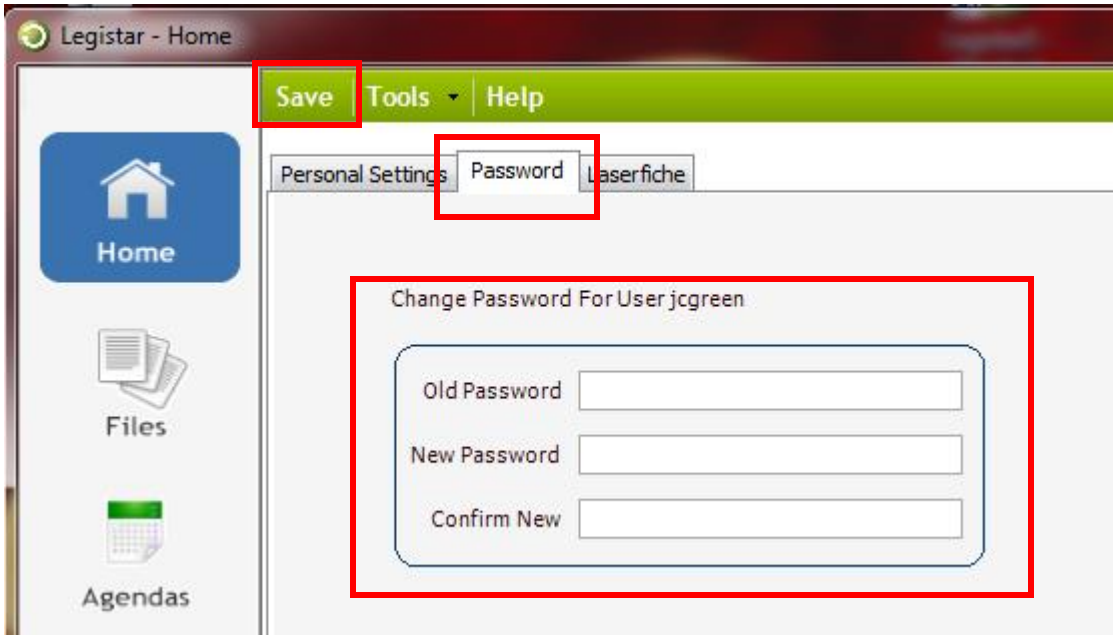
This is your Home Screen. Here you can access your settings, create/view Legislative Files, and approve Legislative Files for inclusion on Agendas.



In order to change your password, select Tools ›› Local Settings.

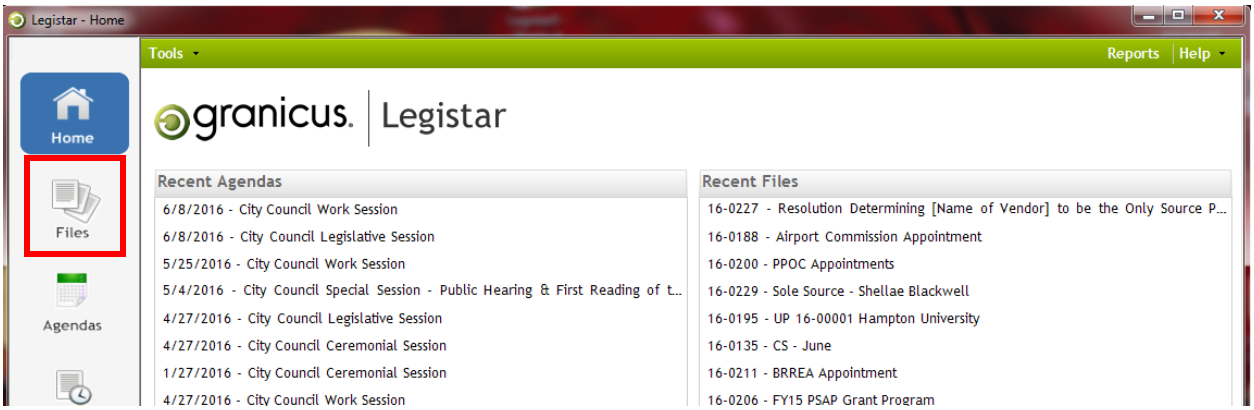


At this screen, you will need to enter the current password once and the new password twice. If you forget your password at any point, please contact the Clerk of Council's Office and they will reset it to the default. (Reminder: The default is "password".)

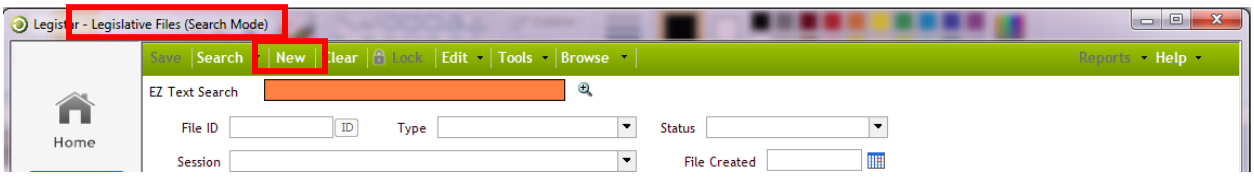


Creating a New Legislative File

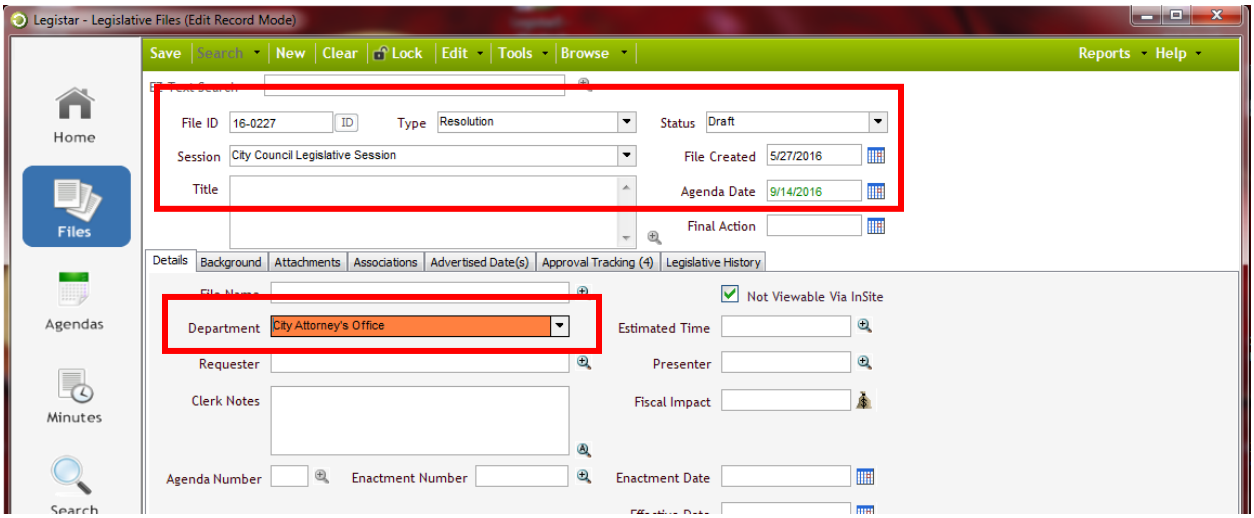
At the Home screen, select the icon for Files.



The Legislative Files screen will initially be in Search Mode. In order to create a new file, select "New" from the top toolbar.



When you create a new file, certain information will auto-populate.



- The File ID is the year (17 for 2017), followed by four digits. This will be your primary searching tool.

- Session and file Type are populated by your default setting and can be changed in the dropdown menu. If you find that your default is not your most common entry, the default can be changed in your Local Settings.
    - City Council Work Session is the regular 1pm session.
    - City Council Legislative Session is the regular 6:30pm session.
    - City Council Ceremonial Session is the once monthly 6:00pm session.
    - City Council Special Session is any session that does not fall into another category.

- Status is always set to Draft until it is sent to an approver. At that time, it changes to ATS Review. In the Draft and ATS stages, the item is not published online.

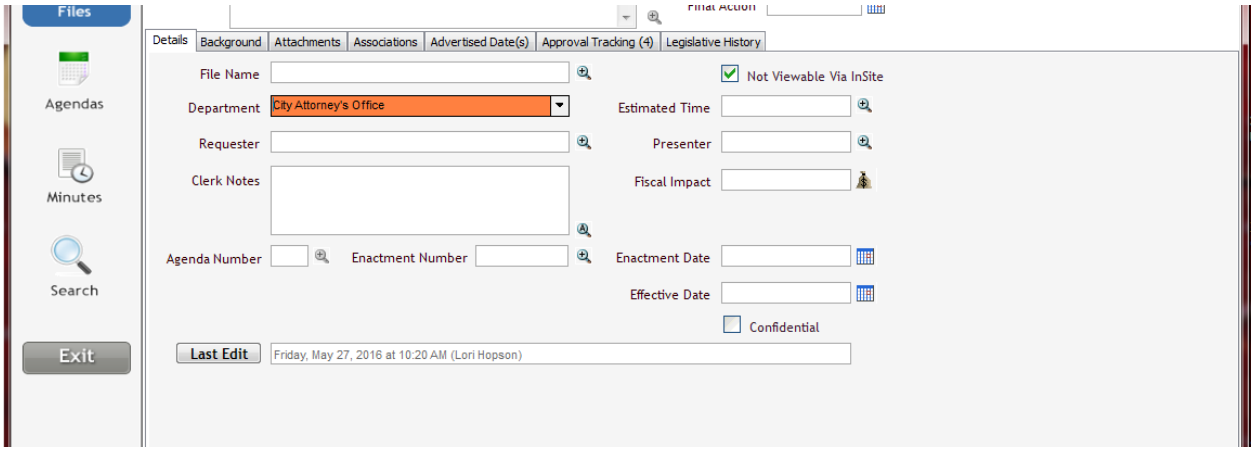
- File Created will always populate to the current date.

- Agenda Date can only be set to those dates where a meeting is scheduled. The meeting you choose is only a <u>request</u>, not a guarantee. Items can be entered as early as desired.
    - Your file cannot be saved or exited unless you set an Agenda Date.
    - If you create a file in error, please log the File ID to use at a later date, or inform the Clerk of Council's Office so they may schedule it for their use.

- Department will populate to **your** department. If you are entering an item for another department (for example, Budget entering a grant for Police), please change it to the most appropriate department.

Drafting a New Legislative File

Details Tab



- File Name is a *short*, *concise* phrase to easily locate the file in the future. It should not be the full title of your Legislative File.

- Requester is the person who is asking for the item to be entered (for example, if an assistant is entering the item for an Assistant City Manager, the ACM is the Requester).

- Estimated Time is how much time the item will need to be presented to Council. This does not include time for Q&A.

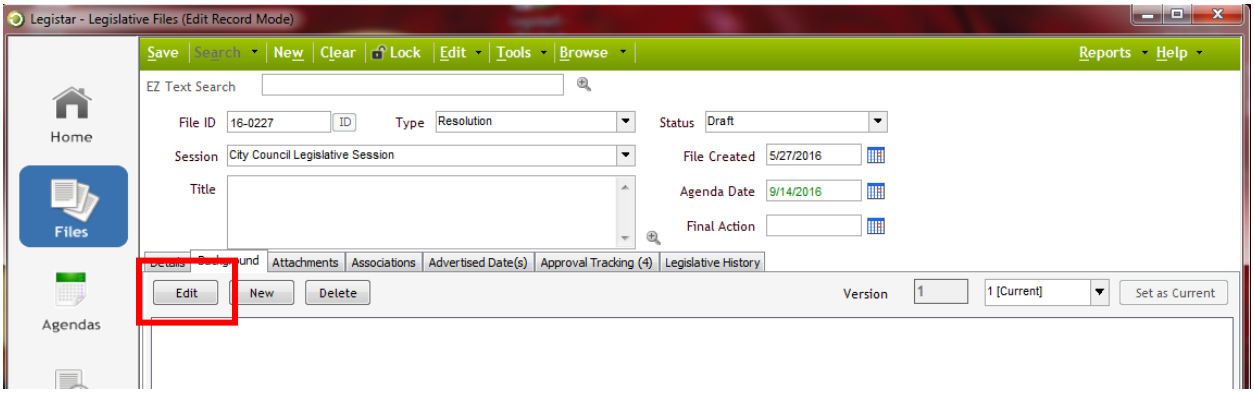
- Presenter is the person providing the presentation, or the person who will be present in the meeting to answer questions if no presentation is needed.

- Fiscal Impact is the monetary effect the item will have on the City. If there is none, enter $0.00.

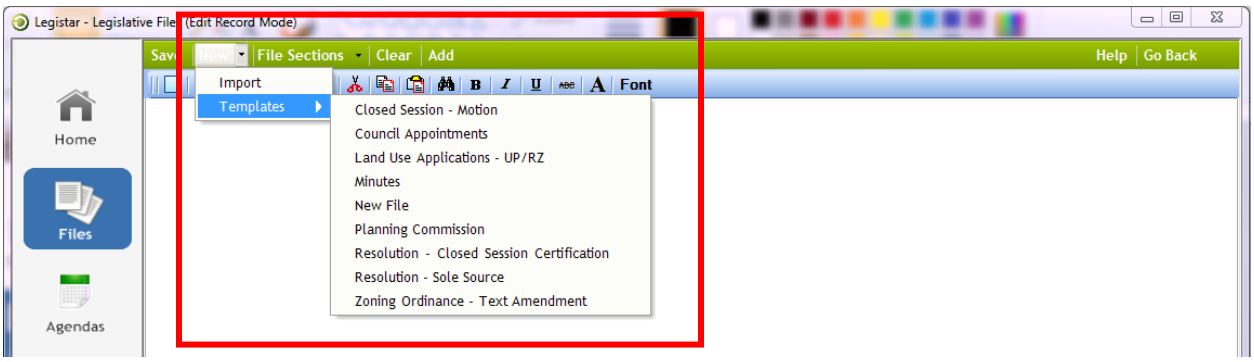
- **DO NOT touch either of the check boxes.**

Background Tab

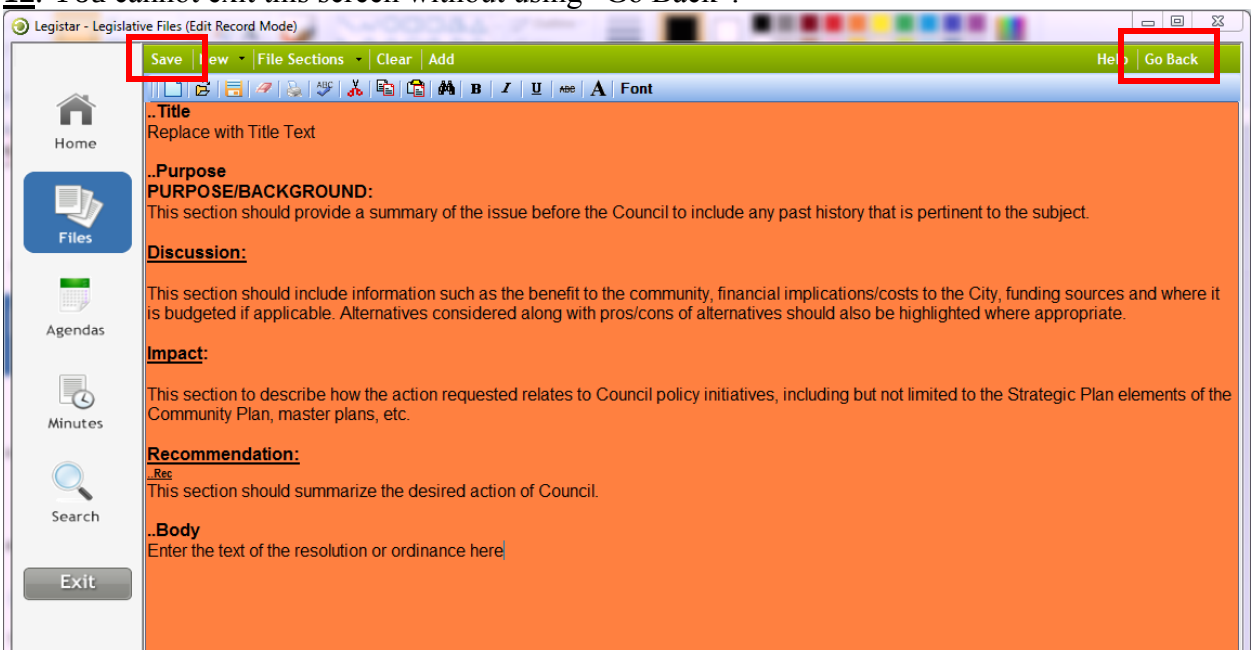
In order to enter a background, you must hit “Edit”.



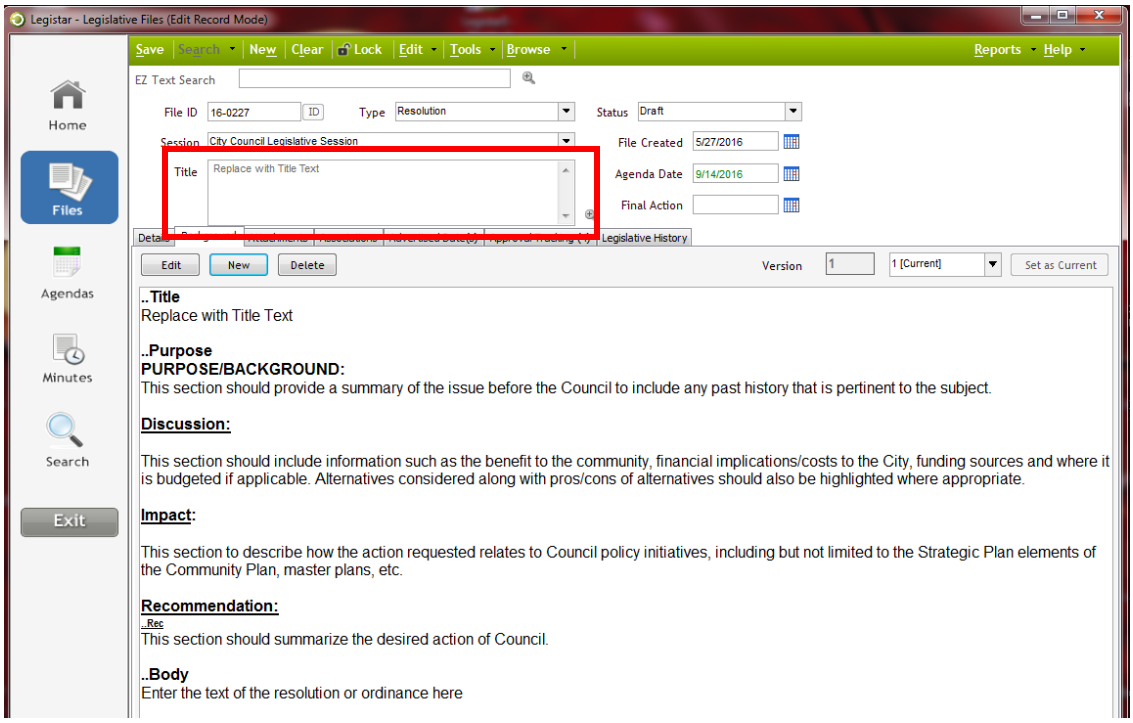
You MUST select a Template. If you do not see a preset Template that fits your needs, use the standard “New File” Template, or request one be designed by the Clerk of Council’s Office.



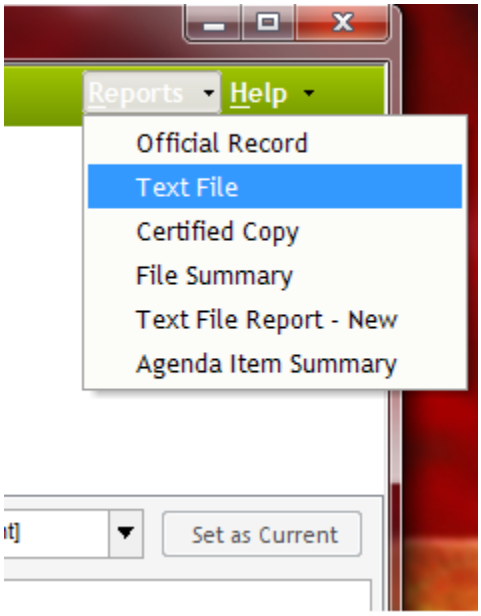
Each section in the Templates provides instructions. **DO NOT delete any text proceeded by ".."**. These sections are pulled into other parts of the software. The font should **always** be **Arial 12**. You cannot exit this screen without using "Go Back".



The title populates from your background information. You cannot edit the background from this screen.



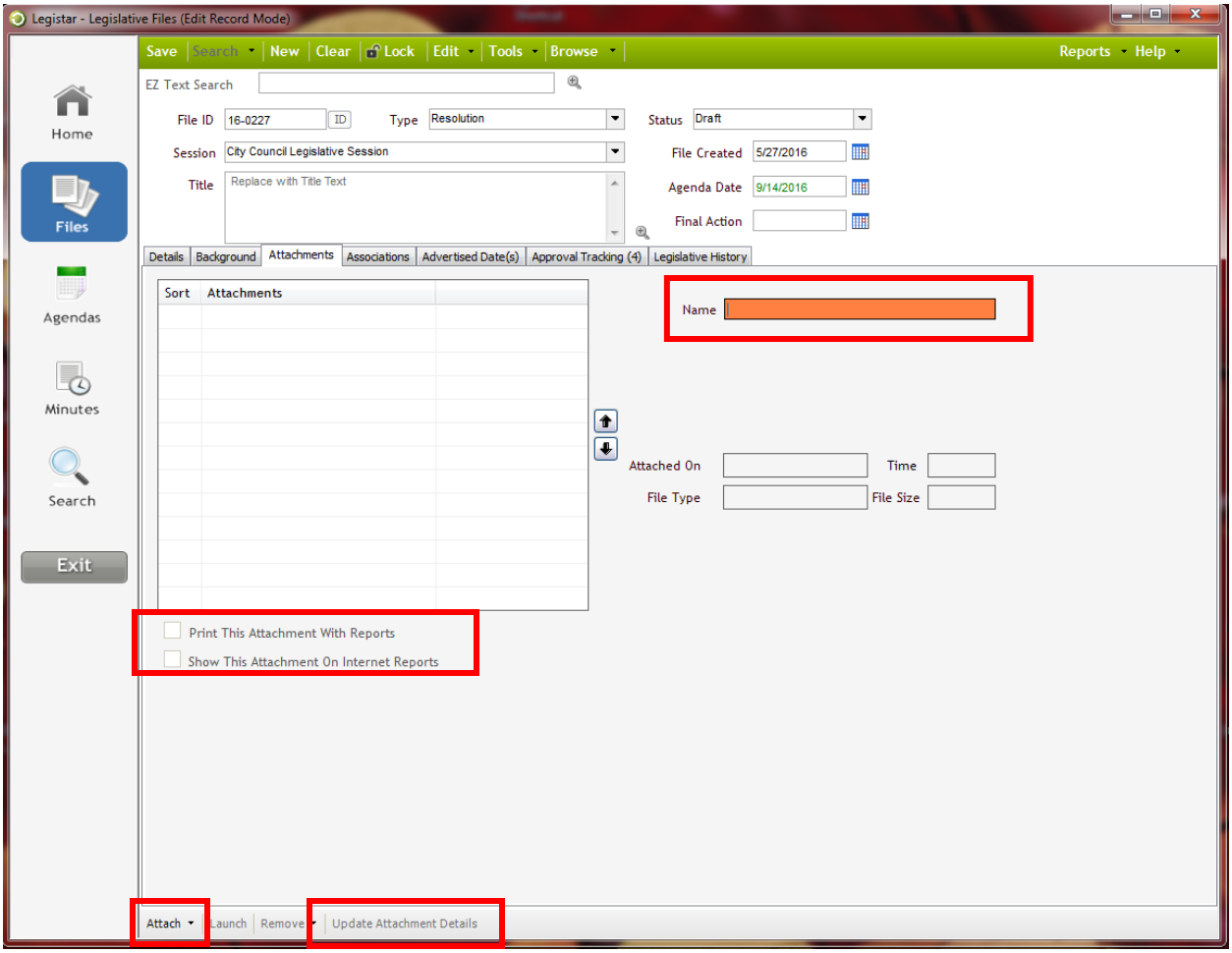
When entering an item that has a Body (generally a Resolution or Ordinance), please check that the formatting is acceptable for a final document. Running a Text File Report will show you what it will look like when printed for the Mayor's signature.



- Although the best practice is to directly type all items into the background, sometimes length does not make this feasible. **Do not copy and paste anything directly from Word without first removing all formatting.** The best way to clear any formatting is by copy/pasting into **Notepad**, and copy/pasting from there. All actual formatting should be done in Legistar.

- Do not add any sort of signature block or line indicating a formal adoption date. This information will be populated by the system after Council votes on it.

Attachments Tab



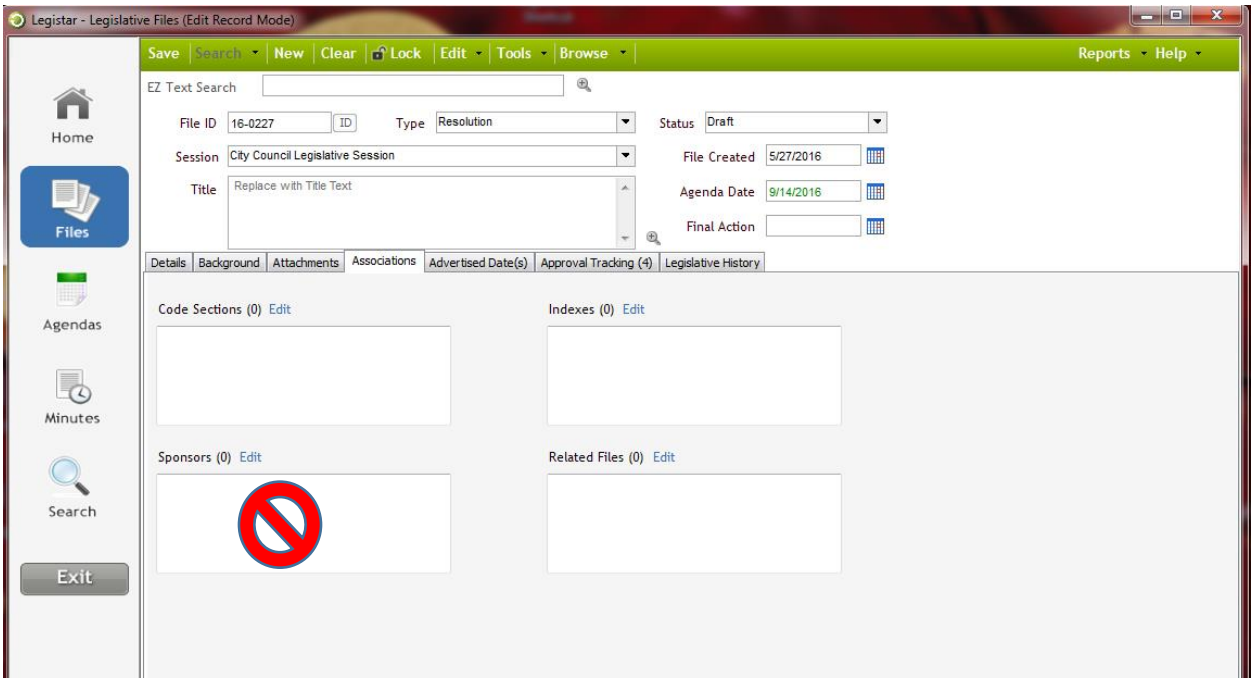
- The software will convert all files to PDF format.

- Only attach PDFs, Powerpoint Presentations, Word Documents, and JPEGs. Either pptx/docx or ppt/doc are acceptable formats. Convert Excel Documents to PDF before attaching.

- Only uncheck the boxes if an item is confidential. This will need to be done on each individual attachment. If an item is attached that is confidential, email the Clerk of Council so she is aware and can insure that it will not be published.

- Shorten attachment names using the Name box and Update Attachment Details button.

Associations Tab



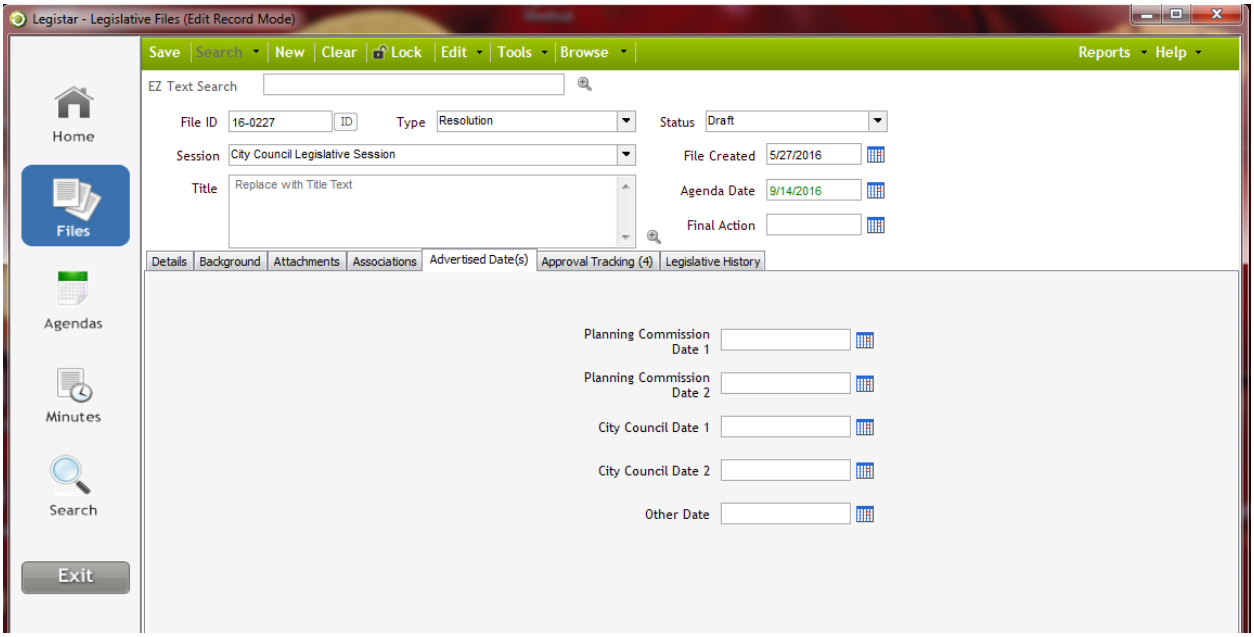
- Code Sections should only be filled in by the City Attorney's Office. This will not always be applicable.

- Related Files should be included if the item is an update to a previously entered file. This will not always be applicable.

- The City of Hampton does not use Sponsors.

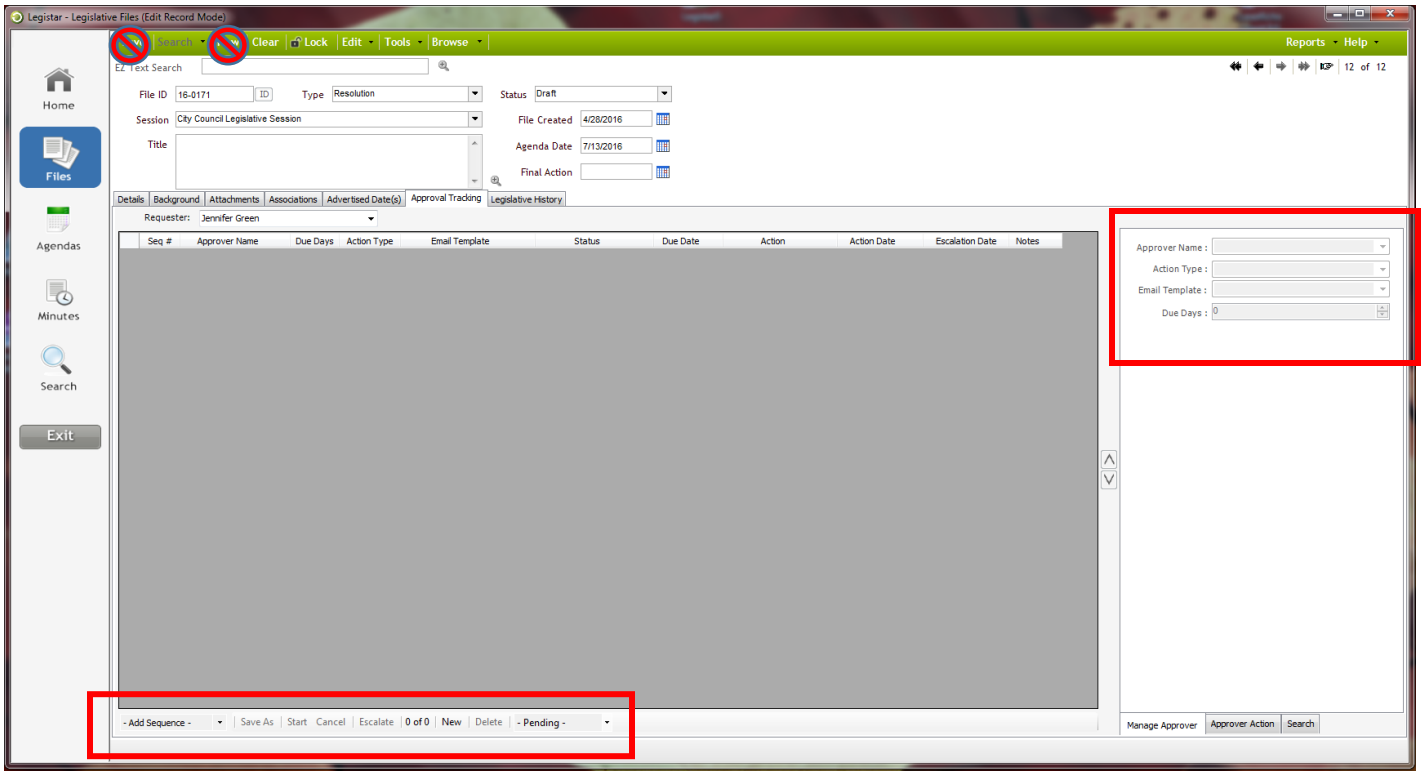
- Indexes should **always** be filled out. If you don't believe any of those provided is applicable to your Legislative File, contact the Clerk of Council's Office. If necessary, a new category will be created to fit your needs.

Advertised Date(s) Tab



- This tab is especially important for Public Hearings. These should be the dates that the advertisements were listed in the Daily Press.

Approval Tracking Tab



- You will have a set of preset sequences available for your use under the "Add Sequence" button. It is important to use the correct one as certain ones will determine where the item is pulled into the Agenda.

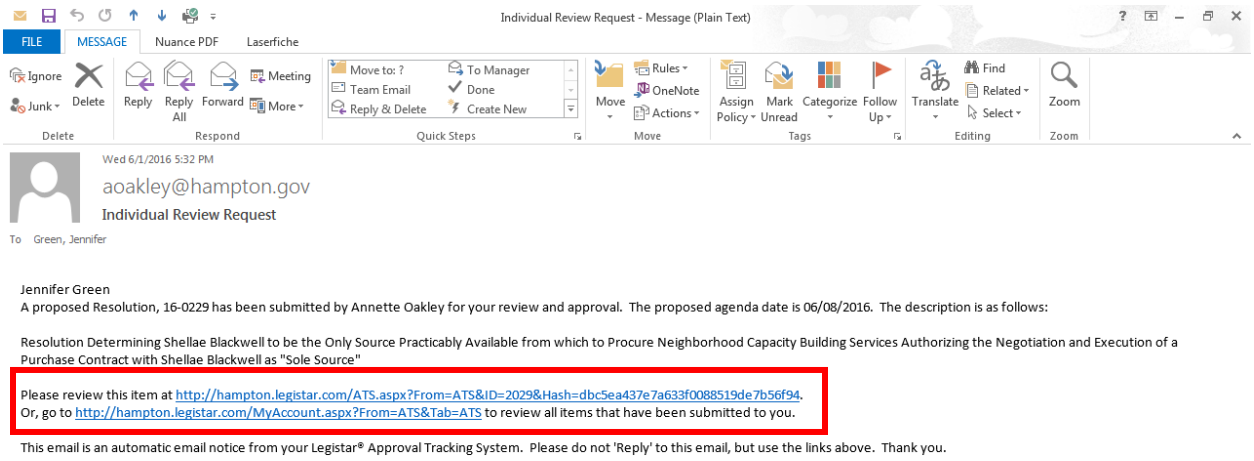
- If you are building a sequence from scratch, you **MUST** include the Agenda Management Team as an FYI and the Clerk of Council as the final Individual Review Request. A good rule of thumb is to include your department head and the attorney that oversees your department.

- When building a sequence from scratch, select "New" at the **BOTTOM** before entering each person and "Save" at the **BOTTOM** after entering the information.

- After choosing/completing your sequence, select "Start" at the bottom of the screen. This will freeze your ability to make any edits unless the item is disapproved and sent back to you.

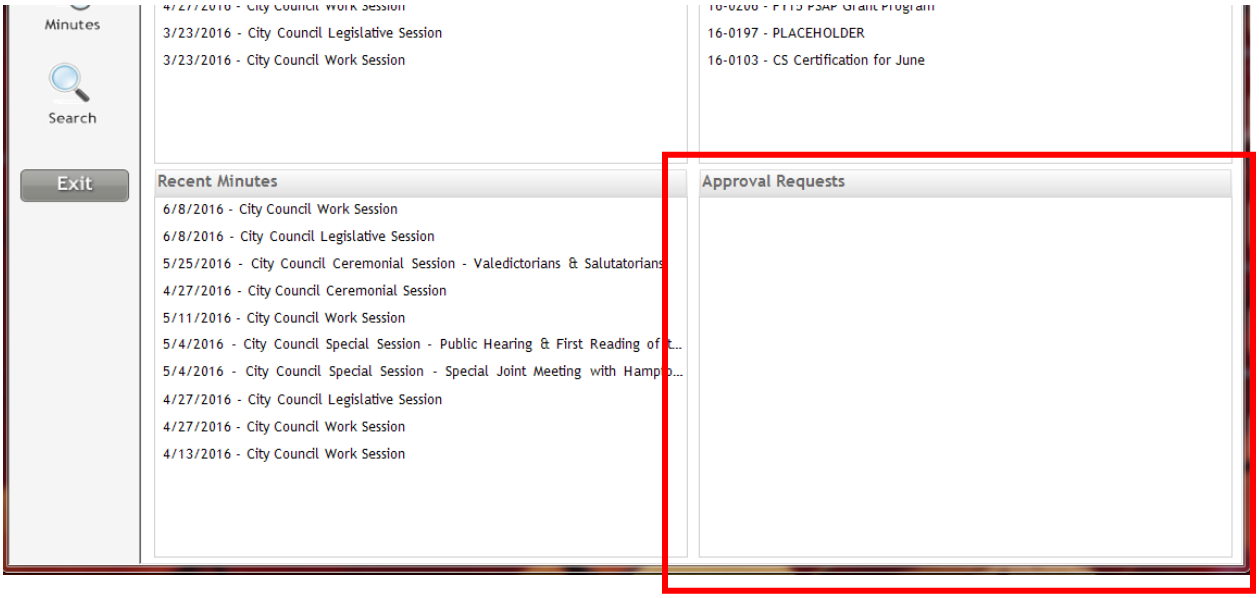
Approving a Legislative File

When a Legislative File is ready for your approval, you will receive the following email:

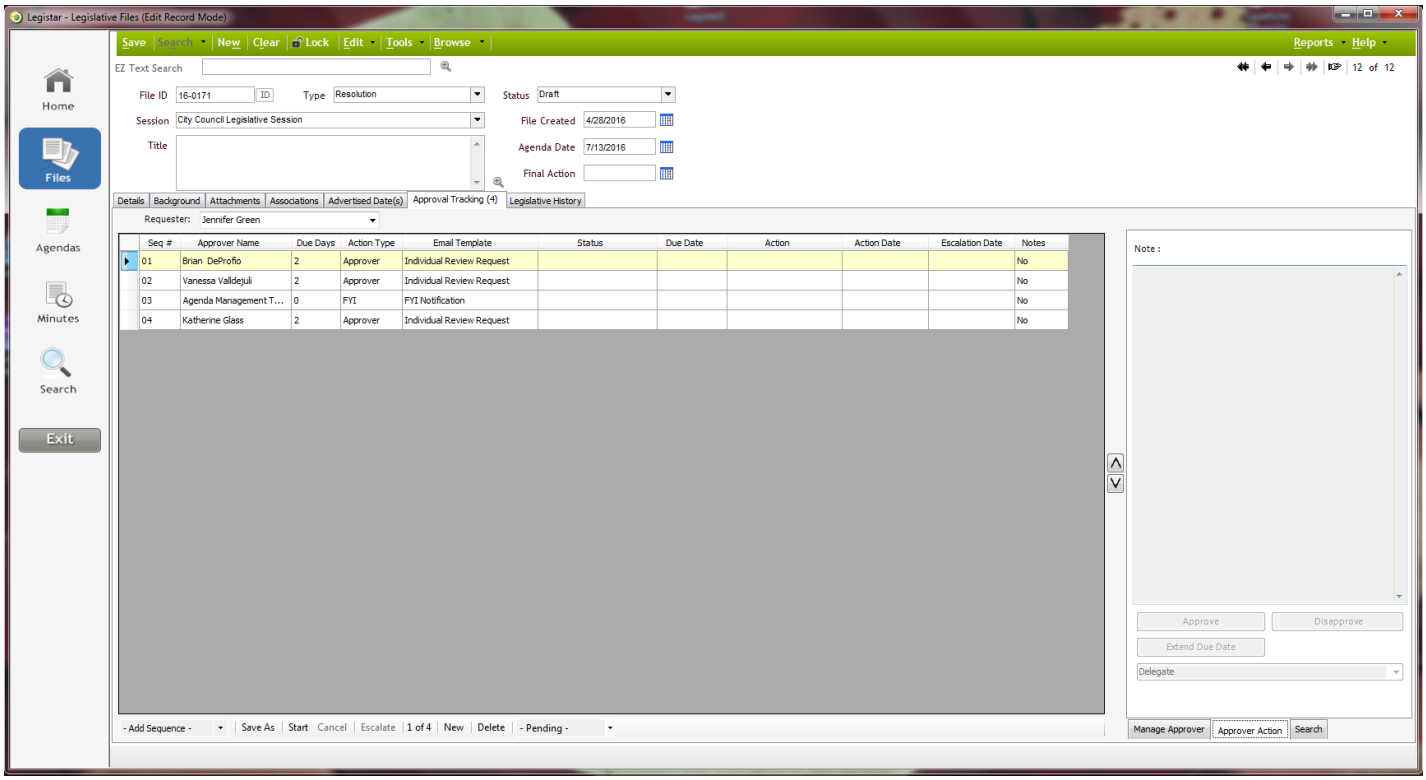


You can choose to follow the link, which will bring you to hampton.legistar.com, where you will be required to log in. You will not be able to view most of the information provided in the Legislative File, so you should only use this link if you have previously reviewed the item on paper or in the Legistar program.

The best practice is to log into the Legistar program. At the home screen you will have a list of Legislative Files waiting for your review. Clicking on the file will bring you to the Approval Tracking tab, and you can review each tab in the Legislative File from there.



You can choose to Approve, Disapprove, or Delegate. If you choose to delegate your approval to another person, that person must also be an Approver in the system. If you disapprove an item, it will go back to the original Drafter. **The Notes section should indicate why you are disapproving the item.**



- If you have an Alternate Approver set up in the software, and you provide no response to the Legislative File in the 2 day time limit (weekends are excluded from this daily count, but holidays are not), it will escalate to your Alternate Approver.

- If it is determined that an item may not be going on the Agenda as planned, or will need many additional updates, it is possible to pause the sequence from the bottom bar. This will keep the item from escalating (and stop the reminder emails).

- Approvers can make edits to any section of the Legislative File. If you find simple typos that you want to fix, or you have an additional attachment to provide, you do not have to disapprove it and send it back to the Drafter.