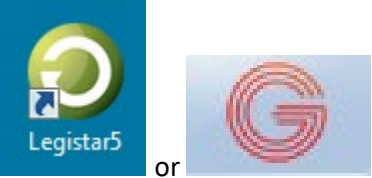
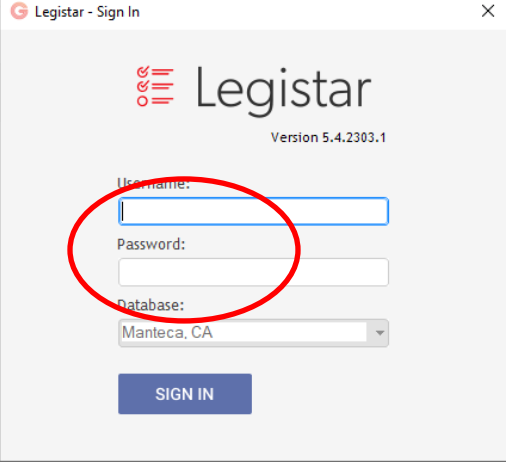
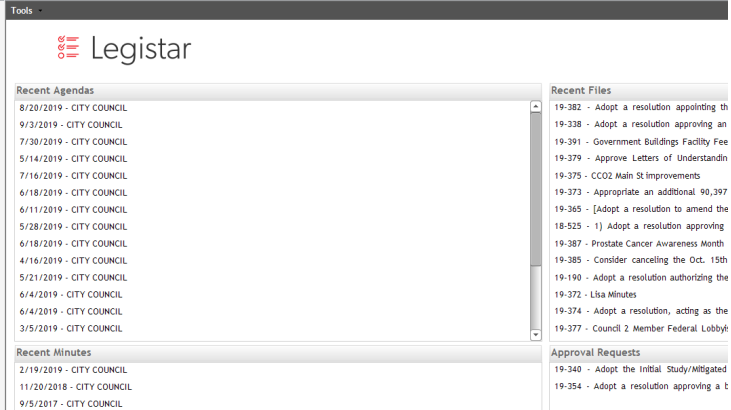
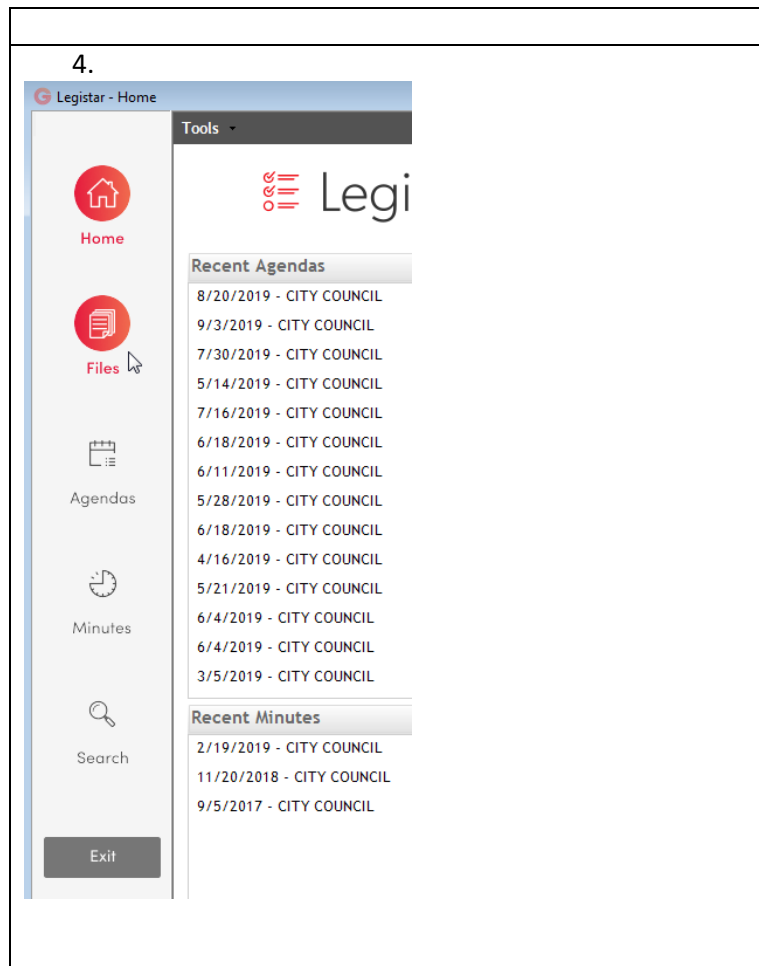
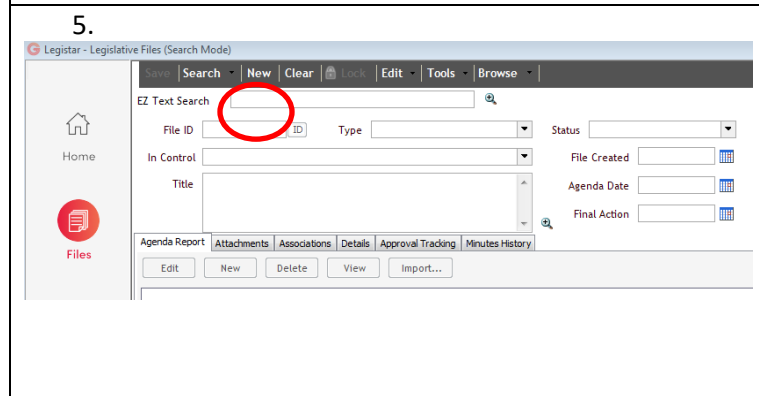


<p>1.</p> 	<p>Open Legistar5</p> <p>(your icon will look like one of the two)</p>
<p>2.</p> 	<p>Login</p>
<p>3.</p> 	<p>Fyi – 4 sectors</p> <p>Recent Agendas</p> <p>Recent Minutes</p> <p>Recent Files ***</p> <p>Approval Requests ***</p>



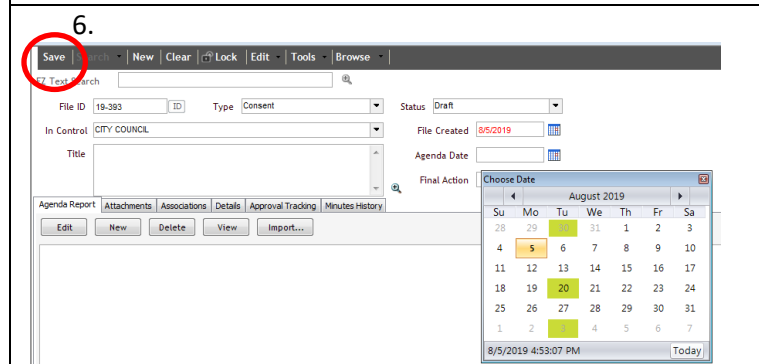
Fyi – 4 sectors

Recent Agendas
 Recent Minutes
 Recent Files ***
 Approval Requests ***

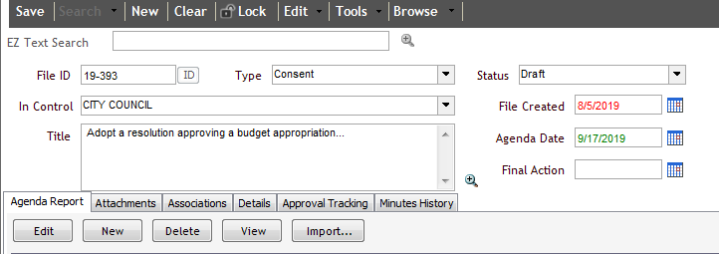
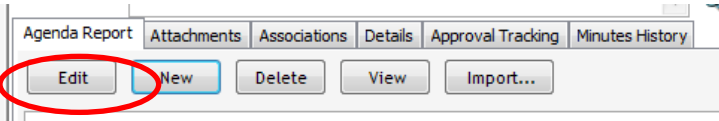
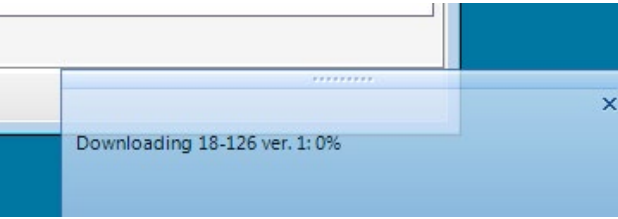
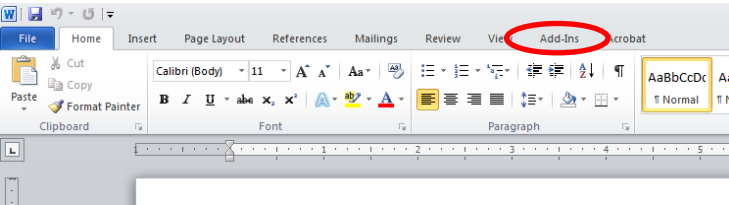
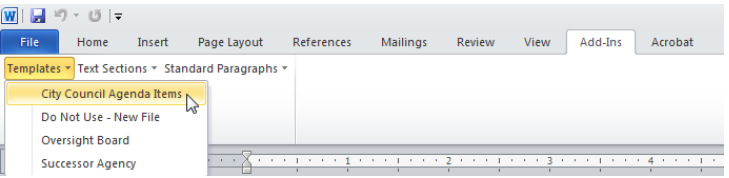


To Enter a Staff Report:

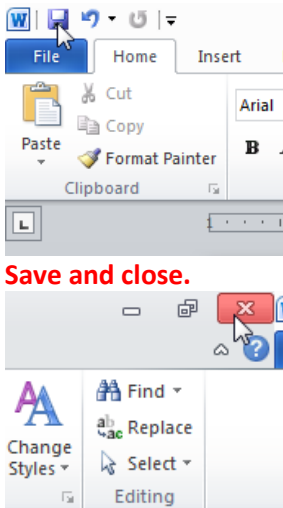
1. Click NEW - this will generate the File ID number.
2. Type – where on the agenda will the item be placed?
 - a. Presentation
 - b. Consent Items
 - c. Public Hearings
 - d. Discussion Items
 - e. Informational Items

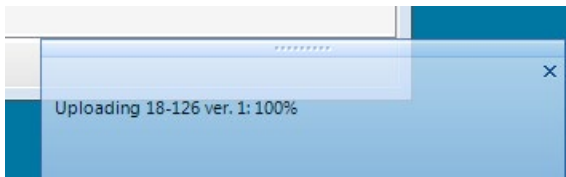


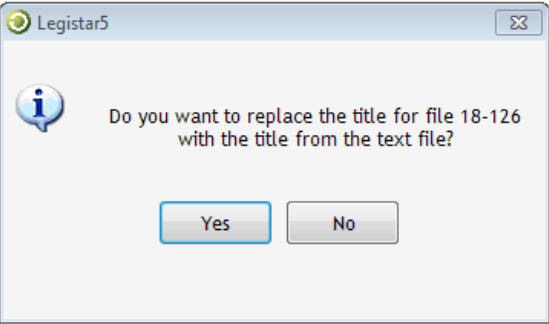
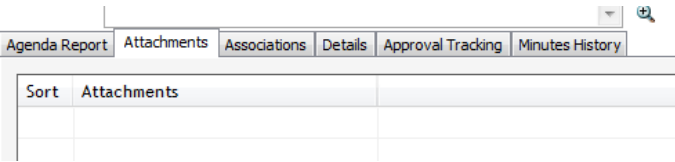
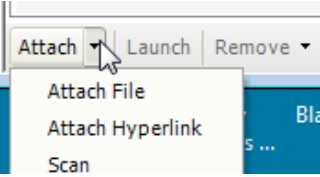
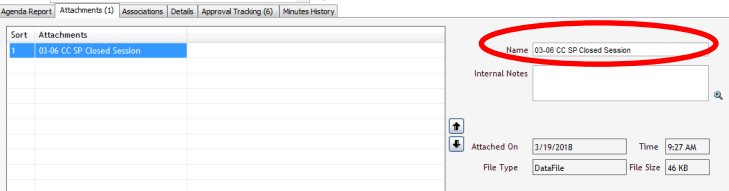
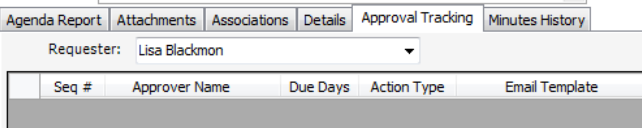
3. Status will generate automatically
4. In control is the meeting body – you will probably only use City Council meeting body
5. File Created will generate automatically
6. Agenda Date – select the correct Council Meeting date
7. Final Action – do nothing

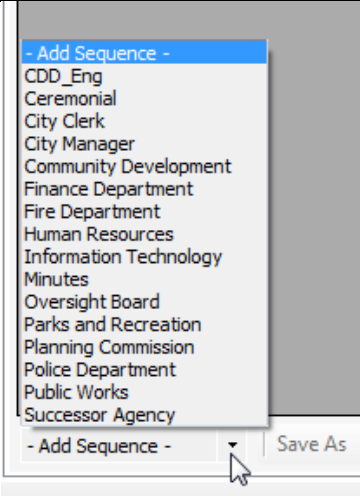
<p>7.</p> 	<p>8. Select SAVE</p> <p>Title: this is what pulls to the Agenda</p> <p>Enter Placeholder – brief description of the item</p> <p>Or when entering entire item at once you can add to Word document and it will update the title.</p>
<p>8.</p> 	<p>When you are ready to create staff report – click EDIT</p>
<p>9.</p> 	<p>At the bottom right side of the screen you will see the DOWNLOADING blue box.</p> <p>This will open the HTML editor/Word doc.</p>
<p>10.</p> 	<p>The Word doc will open. Select ADD-INS at the top of the screen.</p>
<p>11.</p> 	<p>Expand the TEMPLATES dropdown</p> <p>Select “City Council Agenda Items”</p>

<p>12.</p> <p>City Council Agenda</p> <p>Memo to: Manteca City Council</p> <p>From: Your Department Head Name, Title</p> <p>Prepared by: Your Name, Title [not in template, manually add]</p> <p>Date: Date of the Meeting (May, 1, 2018)</p> <p>Subject: Approval of Meeting Minutes</p> <p>.title Approve the Regular Meeting Minutes of April 3, 2018. [This is the recommended action and pulls to the agenda]</p> <p>.body Background: Brief Summary of project, issue, discussion, etc.</p> <p>Fiscal Impact: Complete to your ability – Finance will edit as necessary</p> <p>Documents Attached: [not yet in template – need to manually add]</p> <ol style="list-style-type: none"> 1. Attachment 1 – Minutes 2. Attachment 2 – if there was another attachment it would look like this... 	<p>The Word document will be replaced with the Agenda Template.</p> <p>See example ←</p> <p>Note – it is best not to place tables, images, and graphs in the word document. We cannot guarantee that it will render well.</p> <p>Note – do not remove the “..title” or the “..body” – there is scripting behind the section that allows pulling to the agenda and formatting the agenda packet.</p>
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<p>13.</p>  <p>Save and close.</p>	<p>When you are at a stopping point or are finished, click the SAVE button and CLOSE Word.</p>
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<p>14.</p> 	<p>You will see the blue UPLOADING box appear in the bottom right corner. This is uploading to the HTML editor.</p>
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<p>15.</p> 	<p>Click yes if you would like the “..title” language from the Word document to replace the Title box that will pull to the agenda.</p>
<p>16.</p> 	<p>If you have an attachment – upload it here. Resolutions and ordinances first. Supporting documents second.</p> <p>Apply headers to Attachments on all pages. Arial Bold, 14 point, CAPS, top right corner: ATTACHMENT 1</p>
<p>17.</p> 	<p>Bottom of screen select the ATTACH dropdown – select ATTACH FILE</p> <p>You will browse through your networks and double click the item you would like to attach.</p>
<p>18.</p> 	<p>Rename your attachment: Attachment 1 – Resolution Attachment 2 – Exhibit A to Resolution Attachment 3 – Ordinance Attachment 4 – Agreement Attachment 5 – Vicinity Map etc.</p>
<p>19.</p> 	<p>When your item is complete and ready for approvals, select the APPROVAL TRACKING tab.</p>
<p>20.</p>	<p>Bottom left corner open the ADD</p>



SEQUENCE drop down.
Select your department.

Please Note for PW – we may add a sequence for all divisions, ie: Public Works Engineering, Public Works Water, Public Works Solid Waste, etc.

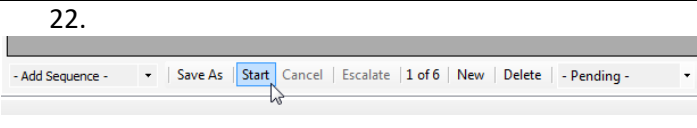
21.

Agenda Report | Attachments | Associations | Details | Approval Tracking (0) | Minutes History

Requester: Lisa Blackmon

Seq #	Approver Name	Due Days	Action Type	Email Template	Status	Due Date	Action	Action Date	Escalation Date	Notes
01	Anthony Sabar	0	PIF	PIF Notification						No
02	Lisa Blackmon	2	Approver	Individual Review Request						No
03	Jeri Traylor	2	Approver	Individual Review Request						No
04	City Attorney	2	Approver	Individual Review Request						No
05	Lisa Blackmon	2	Approver	Individual Review Request						No
06	Tim Ogden	2	Approver	Individual Review Request						No

When you select your sequence the predetermined approval sequence will auto populate. You can add to the sequence but cannot remove anyone.

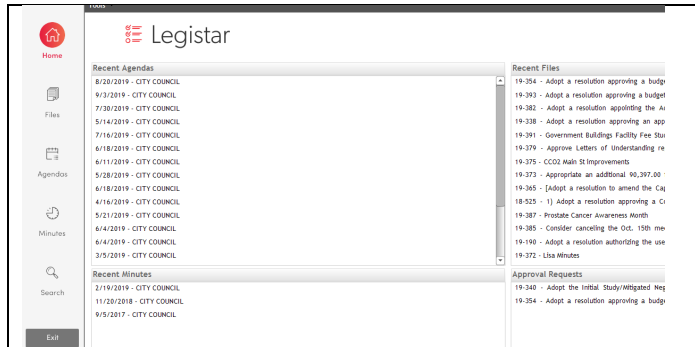


You must click START for the approvals to begin.

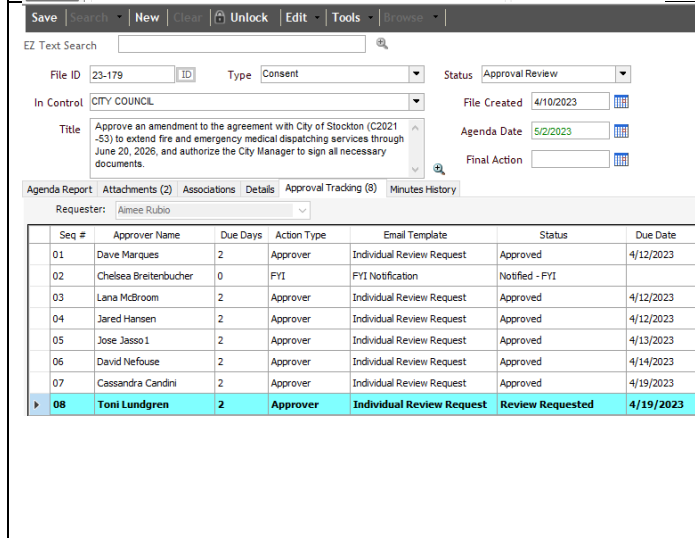
23.
You have successfully completed entering your staff report.

- The item will be approved by the following:
1. Department Head
 2. Budget
 3. Finance
 4. Assistant City Manager
 5. City Attorney
 6. City Clerk
 7. City Manager

FOR APPROVERS – how to review/approve an item:




Under the “HOME” tab (top left red button) the user will see the four quadrants. The bottom right quadrant is the APPROVAL REQUESTS area. When items are in this quadrant the reviewer has items in their queue for review and approval. To open an item, click the item. The item will open to the approval page.



The item will open to the “APPROVAL TRACKING” tab. You may review the item by selecting the “AGENDA REPORT” tab. You may review the Attachments by selecting the “ATTACHMENTS” tab. We are currently not using the following tabs: ASSOCIATIONS, DETAILS, MINUTES HISTORY.

You may edit the work document by selecting the EDIT button and downloading the staff report. You may also send the item back to the staff member that entered the item.

 <p>Note :</p> <p>Approve Disapprove</p> <p>Extend Due Date</p> <p>Delegate</p> <p>Manage Approver Approver Action Search</p>	<p>On the “APPROVAL TRACKING” tab you will see to the far right a Notes text box, Approve and Disapprove buttons and a drop down to delegate the item to someone else.</p> <p>Contact the City Clerk on best practices for approval, disapproving, and delegating.</p> <p>Use the Notes section if you would like to leave information for a future approver.</p>
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