```
┌─────────┐   ┌━━━━━━━━━━┓   ┌──────────┐   ┌──────────┐   ┌──────────┐   ┌──────────┐
│ AGENDA  │   ┃ Prepare  ┃   │Schedule /│   │Approval  │   │Complete  │   │Proof: Run│
│         │──▶┃attachments┃─▶│Retrieve /│─▶ │of minutes│─▶│remainder │─▶│to Adobe  │
│         │   ┃in Legistar┃   │Generate  │   │date/     │   │of agenda │   │Acrobat   │
└─────────┘   ┗━━━━━━━━━━┛   │agenda in │   │hyperlink │   │          │   │(PDF)check│
                             │Legistar  │   │          │   │          │   │criteria) │
                             └──────────┘   └──────────┘   └──────────┘   └──────────┘
```

┌──────────┐   ┌──────────┐   ┌──────────────┐   ┌──────────┐
│Status: │   │Publish to│   │Verify on   │   │Meeting   │
│Approved │──▶│Calendar │──▶│website and   │──▶│Occurs   │
│   │   │   │   │add to Meeting│   │   │
│   │   │   │   │Schedule   │   │   │
└──────────┘   └──────────┘   └──────────────┘   └──────────┘

Prepare attachments in Legistar

Every item on your agenda needs to have a File ID. This allows the public to use the search function on our website to find every item your committee discusses. Review your agenda notes and prepare files in order for attachments to be placed on the agenda:

1. Click on Files (left side menu) - you are in Search Mode
   - Click on New (File ID will populate)
   - Select File Type: Miscellaneous (for example)
   - Select Controlling Body (select your Meeting Body from the drop-down)[†]
2. Text File sheettab
   - Edit (Text File Tab)
     - Click on New drop-down
     - Click on Template
       - Select appropriate File Type (Discussion Item, Report, Presentation, Miscellaneous, etc.)
   - Replace bracketed text with information
   - Font style/size should be Arial 11
   - Click on Go Back (top right button)
     (this updates the Title)

3. Click on Attachments sheettab:
   - Click on Attach drop-down (lower left corner)
   - Click on Attach File (browse to PDF from folder)
   - Click on Open (PDF will appear in the Attachment list)
4. Click on Details sheettab:
   - File Name: Copy/paste Title from the Text File window
   - Entered by: (defaults to your email)
   - Author: (optional)
5. Review legislative file
6. Save
7. Clear

[†]When creating files specifically for agendas, the "Controlling Body" needs to reflect the Meeting Body. This will allow the file to automatically appear on the agenda after clicking on the "Generate" button.

```
┌─────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐
│         │   │   Prepare    │   │  Schedule /  │   │ Approval of  │   │  Complete    │   │ Proof: Run to│
│ AGENDA  │   │ attachments  │──▶│  Retrieve /  │──▶│   minutes:   │──▶│ remainder of │──▶│Adobe Acrobat │
│         │   │ in Legistar  │   │Generate agenda│  │date/hyperlink│   │   agenda     │   │ (PDF) (check │
│         │   │              │   │ in Legistar  │   │              │   │              │   │  criteria)   │
└─────────┘   └──────────────┘   └──────────────┘   └──────────────┘   └──────────────┘   └──────────────┘

              ┌──────────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐
              │              │   │              │   │ Verify on    │   │              │
              │   Status:    │──▶│  Publish to  │──▶│ website and  │──▶│   Meeting    │
              │   Approved   │   │   Calendar   │   │  add to      │   │   Occurs     │
              │              │   │              │   │Meeting Schedule│ │              │
              └──────────────┘   └──────────────┘   └──────────────┘   └──────────────┘
```
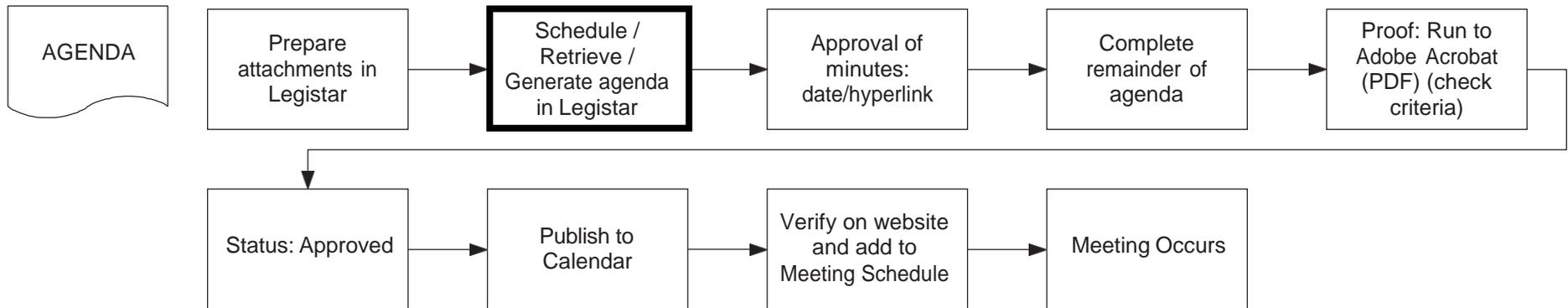
Schedule / Retrieve / Generate agenda in Legistar

Use Legistar to schedule all your meetings for the year:

1. Click on Agendas (left side menu)
2. Calendar sheettab will appear
3. Click on New
   - Select Agenda Meeting Body (populate)
   - Enter Location (populate)
   - Select Date
   - Select Time (populate)
4. Click on Save and Clear

To retrieve / generate an agenda:

1. Click on Agendas (left side menu)
2. Calendar sheettab will appear
3. Select meeting body from the "Agenda for the" drop-down
   - Click on Search
   - Select line with agenda
4. Click on Agenda sheettab
5. Generate (bottom left bar)
6. Languages line appears first
   - Edit the comment field to add your contact information for Languages: (includes name, department, telephone number)
7. Review to make sure that all files (attachments) are appearing on your agenda

```
┌──────────┐   ┌──────────┐   ┌──────────┐   ┏━━━━━━━━━━┓   ┌──────────┐   ┌──────────┐
│          │   │ Prepare  │   │ Schedule/│   ┃ Approval ┃   │ Complete │   │Proof: Run to│
│  AGENDA  │──▶│attachments│──▶│ Retrieve/│──▶┃   of     ┃──▶│remainder │──▶│Adobe Acrobat│
│          │   │   in     │   │Generate  │   ┃ minutes: ┃   │   of     │   │(PDF) (check │
│          │   │ Legistar │   │agenda    │   ┃date/     ┃   │  agenda  │   │ criteria)   │
└──────────┘   └──────────┘   │in Legistar│  ┃hyperlink ┃   └──────────┘   └──────────┘
                              └──────────┘   ┗━━━━━━━━━━┛
```

```
┌──────────┐   ┌──────────┐   ┌──────────┐   ┌──────────┐
│ Status:  │   │ Publish  │   │ Verify on│   │          │
│ Approved │──▶│    to    │──▶│ website  │──▶│ Meeting  │
│          │   │ Calendar │   │and add to│   │ Occurs   │
│          │   │          │   │ Meeting  │   │          │
└──────────┘   └──────────┘   │ Schedule │   └──────────┘
                              └──────────┘
```
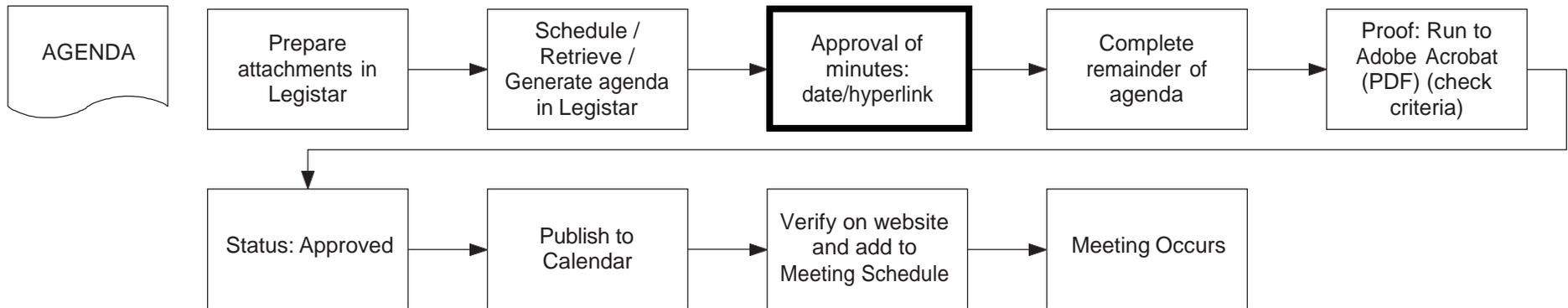
Approval of minutes: date/hyperlink

1.   Click on Approval of Minutes line.
        -       Comment
                -       Click on magnifying glass to the right
                -       Replace bracketed text to add the date of minutes being approved
                -       The link to the calendar is included in the text area (https://madison.legistar.com/Calendar.aspx)
                -       Click on OK.
        -       Click on Save.

```
┌─────────┐   ┌──────────┐   ┌──────────┐   ┌──────────┐   ┏━━━━━━━━━━┓   ┌──────────┐
│ AGENDA  │   │ Prepare  │   │ Schedule/│   │ Approval │   ┃ Complete ┃   │ Proof: Run to│
│         │──▶│attachments│─▶│Retrieve/ │─▶│ of       │─▶┃remainder ┃─▶│ Adobe Acrobat│
│         │   │in Legistar│   │Generate  │   │ minutes: │   ┃ of       ┃   │ (PDF) (check │
└─────────┘   └──────────┘   │agenda in │   │date/     │   ┃ agenda   ┃   │ criteria)    │
                             │Legistar  │   │hyperlink │   ┗━━━━━━━━━━┛   └──────────┘
                             └──────────┘   └──────────┘
```

| Status: Approved | → | Publish to Calendar | → | Verify on website and add to Meeting Schedule | → | Meeting Occurs |
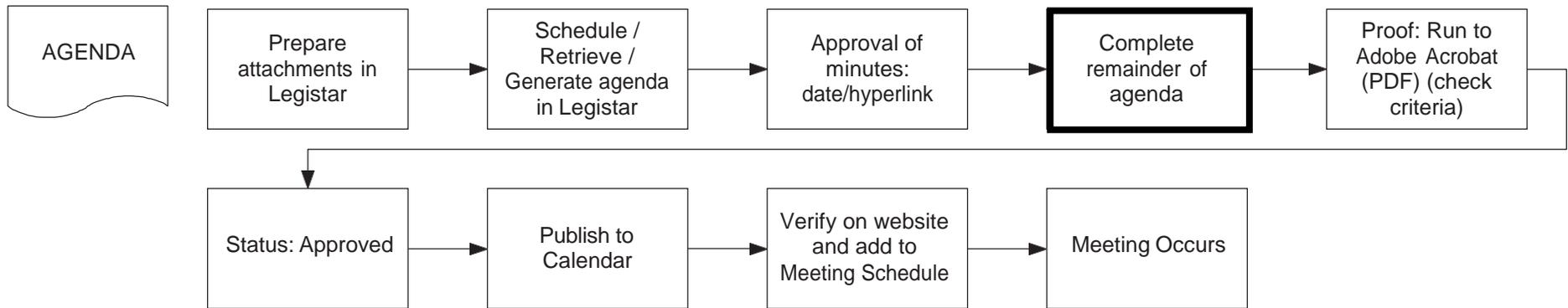
Complete remainder of agenda

1. Add lines as needed.
   - Click on Add button on bottom toolbar.
     Note: In the area below the Agenda sheettab, there are two buttons indicating Agenda Item or Header/Comment. When you add a line, be sure to select Header/Comment if there is not a file. Agenda Item is reserved for files.
   - Review choices in drop-down and select accordingly.
2. Look at headings and styles for consistency
3. Click on Auto-#.

| AGENDA | Prepare attachments in Legistar | → | Schedule / Retrieve / Generate agenda in Legistar | → | Approval of minutes: date/hyperlink | → | Complete remainder of agenda | → | **Proof: Run to Adobe Acrobat (PDF) (check criteria)** |

| Status: Approved | → | Publish to Calendar | → | Verify on website and add to Meeting Schedule | → | Meeting Occurs |
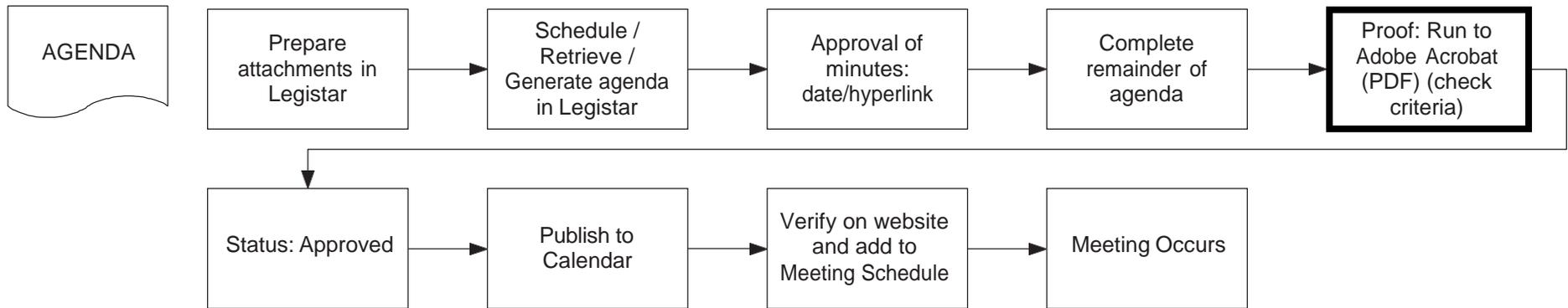
Proof: Run to Adobe Acrobat (PDF) (check criteria)

1. Go to Agenda sheettab
2. Click on Reports
3. Select Agenda
4. Select Destination: Adobe Acrobat (PDF)
5. Review Criteria:
   - ☐ Show Cover
   - ☒ Show File ID
   - ☒ Show Agenda Status
   - ☐ Show Legislative File Sponsors (optional)
   - ☐ List Attachments (optional)
   - ☒ Show Agenda Notes
   - ☐ Show Legislative File History (optional)
   - ☐ Show Legislative File History Notes (optional)
   - ☐ Keep Section Together (optional)
   - ☒ Show .. Title
6. Click on Run (top menu bar)
   - Review the agenda
7. Click on Close

DYK: Typing "page break" in the description line forces a page break on your agenda.

```
┌─────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐
│         │   │   Prepare    │   │  Schedule /  │   │ Approval of  │   │   Complete   │   │Proof: Run to │
│ AGENDA  │→  │ attachments  │→  │  Retrieve /  │→  │   minutes:   │→  │ remainder of │→  │Adobe Acrobat │
│         │   │  in Legistar │   │Generate agenda│  │date/hyperlink│   │    agenda    │   │(PDF) (check  │
└─────────┘   └──────────────┘   │ in Legistar  │   └──────────────┘   └──────────────┘   │  criteria)   │
                                 └──────────────┘                                          └──────────────┘
       ┌──────────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐
       │              │   │              │   │Verify on website│ │              │
       │Status: Approved│→ │  Publish to  │→  │  and add to   │→  │Meeting Occurs│
       │              │   │  Calendar    │   │Meeting Schedule│  │              │
       └──────────────┘   └──────────────┘   └──────────────┘   └──────────────┘
```
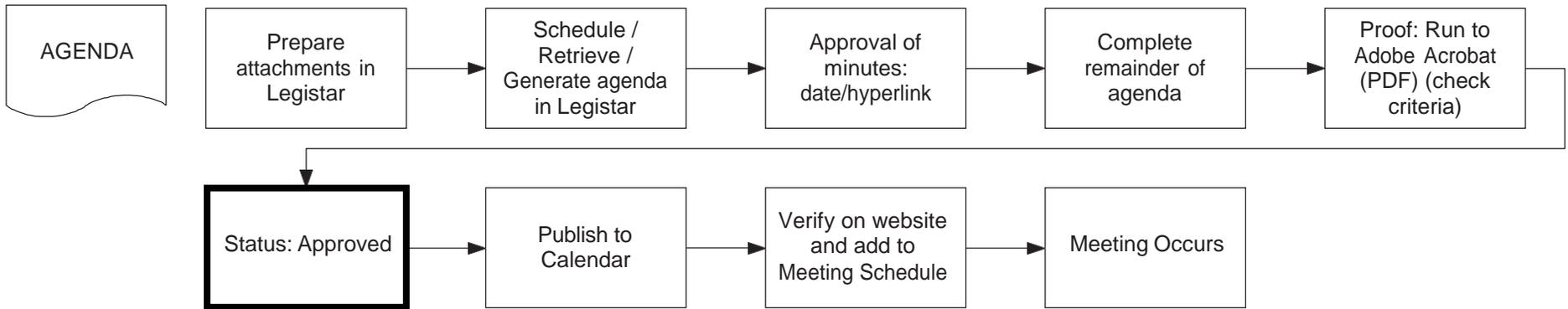
Status: Approved

When approved, change status to Approved.

1.   Go to Calendar sheettab
        -       Select Current Status: Approved
        -       Click on Save

Note: You will also use the Current Status to reflect a cancelled or amended meeting.

All Approved / Cancelled / Amended agendas must be published and emailed to Clerk's Office (CL Meetings)

```
┌─────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐
│         │   │  Prepare     │   │ Schedule /   │   │ Approval of  │   │ Complete     │   │ Proof: Run to│
│ AGENDA  │   │ attachments  │──▶│ Retrieve /   │──▶│ minutes:     │──▶│ remainder of │──▶│ Adobe Acrobat│
│         │   │ in Legistar  │   │ Generate     │   │ date/        │   │ agenda       │   │ (PDF) (check │
└─────────┘   │              │   │ agenda in    │   │ hyperlink    │   │              │   │ criteria)    │
              │              │   │ Legistar     │   │              │   │              │   │              │
              └──────────────┘   └──────────────┘   └──────────────┘   └──────────────┘   └──────────────┘

              ┌──────────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐
              │ Status:      │   │ Publish to   │   │ Verify on    │   │ Meeting      │
              │ Approved     │──▶│ Calendar     │──▶│ website and  │──▶│ Occurs       │
              │              │   │              │   │ add to       │   │              │
              │              │   │              │   │ Meeting      │   │              │
              │              │   │              │   │ Schedule     │   │              │
              └──────────────┘   └──────────────┘   └──────────────┘   └──────────────┘
```
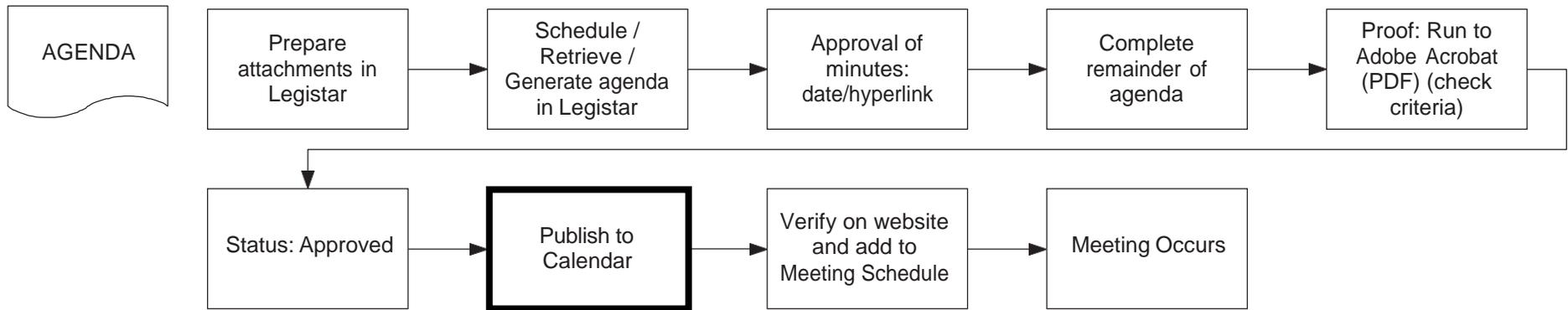
Publish to Calendar

1. Go to Agenda sheettab
2. Select Agenda
3. Click on Reports
4. Select Destination: Publish To InSite - Calendar (PDF)
5. Review Criteria:
    - ☐ Show Cover
    - ☒ Show File ID
    - ☒ Show Agenda Status
    - ☐ Show Legislative File Sponsors (optional)
    - ☐ List Attachments (optional)
    - ☒ Show Agenda Notes
    - ☐ Show Legislative File History (optional)
    - ☐ Show Legislative File History Notes (optional)
    - ☐ Keep Section Together (optional)
    - ☒ Show .. Title
6. Click on Run (top menu bar)
7. Click on Close

```
┌─────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐
│         │   │  Prepare     │   │  Schedule /  │   │  Approval of │   │  Complete    │   │  Proof: Run to│
│ AGENDA  │   │ attachments  │──▶│  Retrieve /  │──▶│  minutes:    │──▶│ remainder of │──▶│ Adobe Acrobat│
│         │   │ in Legistar  │   │ Generate agenda│  │ date/hyperlink│  │  agenda      │   │ (PDF) (check │
└─────────┘   └──────────────┘   │ in Legistar  │   └──────────────┘   └──────────────┘   │  criteria)   │
                                 └──────────────┘                                          └──────────────┘
              ┌──────────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐
              │              │   │              │   │ Verify on website│ │              │
              │ Status: Approved│◀│ Publish to   │◀─│ and add to   │◀──│ Meeting Occurs│
              │              │──▶│ Calendar     │──▶│Meeting Schedule│  │              │
              └──────────────┘   └──────────────┘   └──────────────┘   └──────────────┘
```
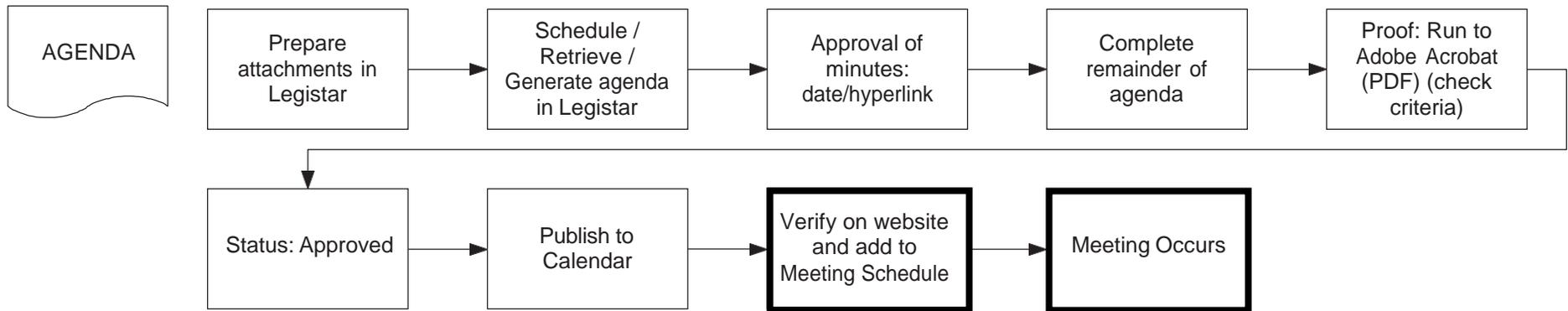
Verify on website and add to Meeting Schedule / Meeting Occurs

Add the agenda to the Meeting Schedule at least 48 hours before to the scheduled meeting.

See APM 3-2 for more information: http://www.cityofmadison.com/mayor/apm.

1.   Visit: (https://madison.legistar.com/Calendar.aspx) to find your published agenda.
        -       Copy the hyperlink to your agenda.
2.   Add the agenda to the Meeting Schedule.
        -       Go to your User Dashboard (https://www.cityofmadison.com/user). Click on "Manage Meetings".
        -       Find your meeting, and click "Edit". Add the Agenda link to the Agenda URL field.