How to Review and Approve Legislation Using Legistar

Opening Legistar

1. Log into Legistar using your Username and Password.



2. With Legistar's main menu displayed, select a file from the "**Approval Requests**" section on your home screen by clicking on the ID number (Bottom Right Hand Corner)

🕙 Home		
	🛠 Tools 🗸	🔣 Reports 🕜 Help
*		Current User: Bob Benham
Home	LEGISIAR Legislative Management Software	Security Group: System Administrators
B		Login Time: 9/27/05 12:03 PM
Legislative Files	Version: 5.0.52	Elapsed Time: 0 Hrs 0 Min 29 Sec
12		~
Agendas	Recent Agendas	Recent Legislative Files
8	6/17/05 Planning Commission	05-0410
Minutes	5/17/06 Board Of Supervisors	05-0412 Naturally Occurring
		05-0413 PN 067-601-18-100 as 05-0384
Text Search		05-0208 Minutes: April 28
		05-0267 PRESENTATION and int
Reports		
	Recent Minutes	Approval Requests
Administrator		05-0405
Administrator		05-0412
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🕓 Legislative F	Files (Read Only Mode)
	🚍 Save 🚧 Search 🗋 New 🛷 Clear 🛐 Edit 🗸 🛠 Tools 🗸 🔍 Browse 🗸 🔢 Reports 🗸 👔 Reports 🗸 👔 Help 🗸
%	EZ Text Search 🛛 🔍 🖉 Advanced Search Hints
Home	File ID 05-0412 ID Type Resolution Type Resolution Status Approval Pending T
Legislative	In Control Board Of Supervisors Table 2010 Created 9/26/05
112	Title Air Quality Management District recommending Resolution 130-2005 authorizing the Chief Administrative Officer to execute all agreements, Agenda Date IIII
Agendas	amendments, purchases and payment requests for the purposes of securing program funds to implement a Naturally Occurring Asbestos
S	File Text 🕃 History 🕼 Attachments 🔀 Details 🌶 Quick Info 🕞 Sup Info1 🕞 Sup Info2 🖉 Approvals (4)
Minutes	# ∠ Approver Name Due Days Escalation Date Approval Status O Kevin Gill 0 9/26/05 FY1 Approver Body
	0 Bob Benham 2 9/28/05 Review Requested Approver Name Kevin Gill
Tert Search	1 Matt Cichon 2 9/28/05 Review Requested
Reports	Control of the second sec
Administrator	* Requestor Cindy Keck 🗸 🔻
2 Help	🔀 Manage 🙀 Approve
Exit	Add Sequence 👻 🛞 Initiate 🚍 Save As New II Pause 🛞 Cancel 1 Of 4 🚍 Save 🗋 New 📴 Delete

3. The screen will now display a Legislative File for review.

4. To review the full text of this Legislative File, Click on the Tab labeled "File Text".

File Text	🕑 History	🜔 Attachments	🔂 Details	Duick Info	🕞 Sup Info1	🕞 Sup Info2	Approvals (4)			
Title Air Quality Management District recommending Resolution 130-2005 authorizing										
the Chief Administrative Officer to execute all agreements, amendments, purchases and payment requests for the purposes of securing program funds to										
implement a Naturally Occurring Asbestos Project in cooperation with the State of California Department of Toxic Substances Control for Fiscal Year 2004/2005 and										
2005/2006 authorized funds in the	subject to to sign Bu e amount i	i review and ap udget Transfer of \$7,200 for p	pro∨al by 25161 ap rogram re	County Coup propriating find properties of the second second second properties of the second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second seco	insel; and Cl iscal year 20 ses.	hairman be 104/2005 gra	ant Delete Curren	t		

- 4. After Reading the text, return to the Approval tab to add your Approval, or to explain why you do not approve of the file as it is.
- 5. Begin this process by clicking on the Approve button on the bottom right hand corner of the approvals screen.

🔂 Manage	<u>íí</u> Approve

	File Te	ext 📴 History 🛛	Attachments	🔂 Details	Duick Info	🕞 Sup Info1	🕞 Sup Info2	Approvals (5)	
	#	Approver Name	Escalation	Date	Approval S	Nahaa			
	*	Jon Johansen	1/27/06	F	FYI	Notes			
	*	Matt Cichon	1/27/06	1	Approved				
	1	Kevin Gill	1/27/06	1	Approved				
•	2	Bob Benham	2/5/06	F	Review Requeste				
	3	Tom Primozic		F	Pending Request				Ð
						*Action Delegate 4	Approvers	Save	•
• B	¥ Add	Sequence 👻 🛞 I	nitiate 📑 Sav	e As II P	ause 🚳 Cance	• 4 Of 5	Save	w 📰 Delete 📄	Pending 🝷
						44	← → *	0 Of 0 Files	

6. After the clicking "Approve" button, the approver is now free to enter their results

* Be sure to choose the appropriate line (with your name as the approver) in order to allow for text entry into these fields).

7. After entering the appropriate information click the Save button.

	File T	ext 📴 History 🛛	Attachments	🔂 Details	🖉 Quick Info	🕞 Sup Info1	🕞 Sup Info2	🥪 Approvals (5)			
	# Approver Name Escalation Date		Approval S	Approval SI Notos							
	* Jon Johansen 1/27/06 F		FYI	Notes							
	*	Matt Cichon	1/27/06	1	Approved	Looks goo	id to me				
	1	Kevin Gill	1/27/06	1	Approved						
►	2	Bob Benham	2/5/06	F	Review Requeste						
	3	Tom Primozic		F	Pending Request				Ð		
						*Action Approved Delegate A	Approvers	Save	•		
							Approve				
	Add Sequence 🗸 🛞 Initiate 🚍 Save As II Pause 🚳 Cancel 4 Of 5 🚍 Save 🖄 New 📴 Delete 📄 Pending 🗸 📔										
						**	← → →	KCS≫ 0 Of 0 Files			

8. A prompt will appear to confirm that you are done reviewing the file, and that you would like to pass possession of the file on to the next user.



9. The file is now assigned to the next person on the list for approval, and the Approval status will be updated.

	File T	ext 📴 History	Attachments	🔂 Details	Quick Info	
	#	Approver Name	Escalation	Date	Approval SI	
	*	Jon Johansen	1/27/06		FYI	
	*	Matt Cichon	1/27/06		Approved	
	1	Kevin Gill	1/27/06		Approved	
	2	Bob Benham	2/5/06		Approved	
►	3	Tom Primozic	2/6/06		Review Requeste	

10. Either choose from your pending list at the bottom right hand side of your approvals tab, or return to the "Home" screen of Legistar to choose another item to review.





Special Features for Approval Tracking

PAUSING A SEQUENCE

1. At any time during the Approval Process the Requestor (Initiator) can pause the Approval Process. Only the requestor can perform this function.

🕙 Legislative I	Files (Read Only Mode)
	🚍 Save 🖓 Search 🗋 New 🖉 Clear 🛐 Edit 🗸 🛠 Tools 🗸 🔍 Browse 🗸 🔢 Reports 🗸 🖉 Help 🗸
<	EZ Text Search @ @ Advanced Search Hints
Home	File Id 06-0077 ID * Type Agenda item * Status Approval Pending *
Legislative Files	* Controlling Body City Clerk Tile Created 2/17/06
100	Title Hearing on Appeal of the Decision of the City Planning Commission to Approve a Modification of an Existing Conditional Use Permit (CUP) to
Agendas	Allow Short Term Commercial Parking at Veterans Stadium Parking Lot Located at 5000 Gabelich
3	File Text 🕃 History 🕼 Attachments 🚯 Details 🏽 Quick Info 🕞 Sup Info1 🕞 Sup Info2 🤡 Approvals (5)
Minutes	# Approver Name Escalation Date Approval Si
-	1 Matt Cichon 2/19/06 Delegated Performance Day
Text Search	Approver Name Kevin Gill
	3 Merianne Nakagawe Pending Request
	4 Larry Herrera Pending Request
Reports	
2	
Administrator	* Requester Kevin Gill 🔍 🔻
0	
Help	
	🖌 🕒 🕒 🔂 🖌 🕒 🖌 🕒
Exit	Add Sequence - 🐵 Initiate 🚍 Save As 🛚 Pause 🍪 Cancel 3 Of 5 🚍 Save 🗋 New 🗐 Delete 📄 Pending -
	4 4 4 4 4 1 1 3 5 Of 12 Files

2. Start by going to the bottom portion of the screen and clicking on the "Pause" button.



3. When Pause is clicked, the overall status of the file will change, and emails will be sent to each individual who has been notified of the file to inform them of the pause (Notice the new Status for the file)

Legislative F	Files (Edit Record Mode)
	🔚 Save 🏘 Search 🗋 New 🖉 Clear 🛒 Edit 🔹 🛠 Tools 🔹 🔍 Browse 🔹 🔢 Reports 🗸 🥑 Help 🔹
<₿	EZ Text Search 🥥 Advanced Search Hints
Home	File Id 06-0077 ID * Type Agenda item • * Status ATS Paused •
Legislative Files	* Controlling Body City Clerk Tile Created 2/17/06
(T2)	Title Hearing on Appeal of the Decision of the City Planning Commission to Approve a Modification of an Existing Conditional Use Permit (CUP) to Agenda Date
Agendas	Allow Short Term Commercial Parking at Veterans Stadium Parking Lot Located at 5000 Gabelich
Ø	File Text 🕃 History 🕼 Attachments 🚯 Details 🏘 Quick Info 🕞 Sup Info1 🕞 Sup Info2
Minutes	# Approver Name Escalation Date Approval SI
5	1 Jon Johansen 2/19/06 Delegated Review
Text Search	2 Kevin Gill Pending Request Approver Name Kevin Gill V
	3 Merianne Nakagawa Pending Request
	4 Larry Herrera Pending Request
Reports	
Administrator	* Desurator (April: Oli
	· Requester reviil oui
0	
Help	Manage 🎽 Anoroye
E vit	Add Sequence - O Initiate Save As > Start O Cancel 3 Of 5 Save New Delete Pending -
EIR	4 # 4 + 4 + 4 → 1 5≫ 5 Of 12 Files

4. The Pause button has now been changed to read "Start". When the file is ready to continue the Approvals Process, click on start.

	File T	ext 🕑 History 👔	Attachments	🕕 Details	Duick Info	🕞 Sup Info1	🕞 Sup Info2	Approvals (5)	
	#	Approver Name	Escalation (Date	Approval SI			-	
	1	Matt Cichon	2/19/06	[Delegated	Approver I	Body		•
	1	Jon Johansen	2/19/06	[Delegated Review	Approver N	lame Kevin Gill		•
•	2	Kevin Gill		F	Pending Request	Approver is			
	3	Merianne Nakagavva		F	Pending Request				EVT
	4	Larry Herrera		F	Pending Request		(• A	pproval kequired 🛛 🔵	
						* Reque	ester Kevin Gill		•
▲					▶	🔁 Manage	👥 Approve		
	¥ Ado	d Sequence 👻 🛞 I	nitiate 📑 Save	e As 🍗 S	tart 🛛 🚳 Cancel	3 Of 5 📑	Save 📄 Nev	v 📑 Delete 📄 P	ending 🕶

5. The file will not revert back to the status that has been set for the approvals process, and the "Start" button will return to being the "Pause" button. (Note: Active buttons display what the user can do.)

CANCELLING AN APPROVAL SEQUENCE

6. At any time during the Approval Process the Requestor (Initiator) can Cancel the Approval Process. Only the requestor can perform this function.

Save 🏘	Search 🕒 New A	🖉 Clear 🛛 📝 Edit 👻	🎌 Tools 👻 🔍 🤇	Browse +		🔀 Reports 👻 🕜 Hel) -
EZ Text	Search				Ð, Ø	Advanced Search Hint	s
File Id	06-0073	D * Type	e Agenda item	T	* Status Approva	l Pending	•
* Controlling Body	City Clerk			•	File Created	2/17/06	
Title	Application of Douglas Cafe, to	Calvin Orr and David	Rodriguez, dba F	our Olives 🔺	Agenda Date		
٦	drop a partner from an 4276 Atlantic	on-sale beer and wi	ne for bonafide e	ating place at	Final Action		
File Text	🕃 History 💧 Attack	hments 🔂 Details	Duick Info	🕞 Sup Info1 🧃	Sup Info2	pprovals (3)	
# Ap	prover Name Es Cichon 2/19/06	scalation Date 6	Approval S Review Requeste	Approver Bo	dy	•	
2 Jon 3 Kevi	Johansen n Gill	F	Pending Request Pending Request	Approver Nan	Matt Cichon	•	
				₽	Approva	l Required 🔵 FYI)
				* Request	er Kevin Gill	•	
▲	uence 👻 🛞 Initiate	Save As 🛛 📕 P	ause 😂 Cance	🔂 Manage 🧾	Approve	Delete 📄 Pendin	g •

7. When cancel has been chosen, the overall status of the file will change, and emails will be sent to each individual who has been notified of the file to inform them of the cancellation (Notice the new Status for the file).

Save 🏚	😸 Save 🌺 Search 🗋 New 🖉 Clear 🛐 Edit 🔹 🔆 Tools 🔹 🔍 Browse 🔹 🛛 👔 Reports 🔹 🕢 Help 🗸										
EZ Text	Search				Ð	🕜 Advance	d Search Hint:	5			
File Id	06-0073 ID	* Туре	Agenda Item		 * Status Dr 	aft		•			
* Controlling Body	City Clerk			•	 File Cre 	eated 2/17/0	6				
Title	Application of Douglas Calvin Cafe, to	Orr and David	Rodriguez, dba l	Four Olives 🛓	Agend	a Date					
9	drop a partner from an on-sai 4276 Atlantic	e beer and wir	ne for bonafide e	ating place at	Final	Action					
File Text	🕃 History 🏮 Attachments	🔂 Details	Duick Info	🕞 Sup Info1	🕞 Sup Info2	🥑 Approval	s				
► # /	Approver Na	ame		Approver	Body		-				
				Approver N	Jame		•				
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				* Reque	ester Kevin Gill		•				
Add Sei		ve As 🛛 🕨 St	art 🖾 Cancel			Delete	Pendina	•			
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						Inde I o OL	12 Files				

8. If at a later time, this file is needs to begin the approvals process anew, simply add another sequence and initiate it.

DELEGATING A FILE

9. If a file has been passed to a person in error, or if it has been passed to a person to assign it to another staff member, the approver would choose the action of Delegate from the Action list.

# Approver Name Escalation Date Approval 5 * Matt Cichon 2/19/06 Review Requeste 2 Jon Johansen Pending Request * Action * Action * Approved Disapproved Sent back for revision Posted * Add Sequence * Sintiate Save As * Percent * Add Sequence *	Ĩ	File T	ext 🕑 History 🛛	Attachments	🔂 Details	Duick Info	🕞 Sup Info1	🕞 Sup Info2	🥪 Approvals (3)	
* Matt Cichon 2/19/06 Review Requeste 1 Kevin Gill 2/19/06 Review Requeste 2 Jon Johansen Pending Request * Action * Approved Disapproved Sent back for revision Poponed for a better time to introduced Extend Due Date * Add Sequence * Save As II Pause Scancel 2 Of 3 Save New Delete Delegate		#	Approver Name Escalation Date		Approval SI	Notos				
1 Kevin Gill 2/19/06 Review Requeste 2 Jon Johansen Pending Request *Action * Approved Disapproved Sent back for revision Postponed for a better time to introduced Extend Due Date • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • •		*	Matt Cichon	2/19/06		Review Requeste	Notes			
2 Jon Johansen Pending Request *Action *Action Approved Disapproved Sent back for revision Postponed for a better time to introduced Extend Due Date Delegate Image: Add Sequence → Save As II Pause Scancel 2 Of 3 Save New Delete Pelegate	•	1	Kevin Gill	2/19/06		Review Requeste				
*Action *Action Approved Disapproved Sent back for revision Postponed for a better time to introduced Extend Due Date Add Sequence * ③ Initiate Save As II Pause ③ Cancel 2 Of 3 Save New Delete Personal		2	Jon Johansen			Pending Request				
*Action *Action Approved Disapproved Sent back for revision Postponed for a better time to introduced Extend Due Date Add Sequence * ③ Initiate Save As II Pause ③ Cancel 2 Of 3 Save Delete Performed										
*Action Approved Disapproved Sent back for revision Postponed for a better time to introduced Extend Due Date Add Sequence * ③ Initiate Save As II Pause ③ Cancel 2 Of 3 Save New @ Delete Pelegate Pelegate										Ð.
Approved Disapproved Sent back for revision Postponed for a better time to introduced Extend Due Date Add Sequence $last initiate Save As II Pause Save Acade Cancel 2 Of 3 Save New Delete Pelpegate$							*Action			
Approved Disapproved Sent back for revision Postponed for a better time to introduced Extend Due Date Pelegate Add Sequence \star ③ Initiate $=$ Save As II Pause ③ Cancel 2 Of 3 $=$ Save \square New $=$ Delete $=$ Pelegate							Action			
Approved Disapproved Sent back for revision Postponed for a better time to introduced Extend Due Date Pelegate Add Sequence \star ③ Initiate \blacksquare Save As II Pause ③ Cancel 2 Of 3 \blacksquare Save \square New \blacksquare Delete \blacksquare Pelegate							· · · · · · · · · · · · · · · · · · ·			
Disapproved Sent back for revision Postponed for a better time to introduced Extend Due Date Add Sequence							Approved			
Sent back for revision Postponed for a better time to introduced Extend Due Date Add Sequence							Disapprov	ed		
Postponed for a better time to introduced Extend Due Date Add Sequence							Sent back	for revision		
							Postponed	for a better time	e to introduced	
Add Sequence - Initiate Save As Pause Cancel 2 Of 3 Save New Polete Pelegate							Extend Du	e Date		
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		😭 Ado	d Sequence 👻 🛞 I	nitiate 📑 Sav	e As 🛛 📕 F	ause 🛛 🚳 Cance	2 OF 3	Save 🗋 Ne	ew 🛃 Delete 📄 I	Pel Delegate

10. When the action of delegate is chosen from the action list, the Delegate Approvers box becomes active. At list time the Approver can choose from a list of available approvers the individual they wish to pass possession of the file too.

*Action	
Delegate 💌	
Delegate Approvers	
▼	
Save	

11. After an approver is chosen, and save is selected the system will prompt the user to verify whether or not they want to go through with this action. If yes is chosen, the requestor will be sent notice of the delegation, and the new approver will receive an email informing them that a file has been created for their review.

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	File Text		🛭 Attachments 🛛 🔂 Details		🖉 Quick Info	C	Sup Info1	🕞 Sup Info2	🥑 Approvals (3)				
	# Approver Name Escalation Date			Approval S		Notec							
	* Matt Cichon 2/19/06 Ri		Review Requeste		NOCES								
▶	1	Kevin Gill 2/19/06 R		Review Requeste									
	2 Jon Johansen Pe			Pending Request									
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	-	-									Ð,		
						*Action							
							Delegate				-		
		Do you war	nt to delegete thi	is file to Larr	y Herrera ?	Delegate Approvers							
							Larry Herr	era			-		
	Yes X No								Save				
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Ň	iew	of s	creen after dele	gation.						
		File T	ext 🕑 History	🕼 Attachments	🔂 Details	Duick Info	🕞 Sup Ini	o1 🕞 Sup Info2	Approvals (4)	
		#	Approver Name	Escalation	Escalation Date					
Ш		*	Matt Cichon	2/19/06	2/19/06 Re		Notes			
Ш	•	1	Kevin Gill	2/19/06	2/19/06 De					
Ш		1	Larry Herrera	2/19/06	ĺ	Delegated Review				
Ш		2	Jon Johansen		ł	Pending Request				
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							4	* + + +>	103 ₽ 7 Of 12 File	:5

EXTEND DUE DATE

12. Approvers may also be given the opportunity to extend the due date on an item they have been sent. If this action is chosen, automatic escalation of the file to an alternate approval can be avoided.

	File T	ext 📴 History 👔	Attachments	🔂 Details	Quick Info	0	Sup Info1	🕞 Sup Info2	🥑 Approvals ((3)
	#	Approver Name	Escalation	Date	Approval S		Nebee			
	*	Matt Cichon	2/19/06		Disapproved		INOTES			
•	1	Jon Johansen	2/19/06		Review Requeste					
	2	Kevin Gill			Pending Request					
										.
							*Action			
										•
							Approved			
							Disapproved	ed		
							Sent back	for revision		
							Postponed	for a better time	e to introduced	
							Extend Due	e Date		
•					•	C	Delegate			Extend Du
	Ad	d Sequence 👻 🛞 I	nitiate 📑 Sav	ve As 🛛 📕 F	Pause 🚳 Cance	2	2 OF 3 🗄	Save 🗋 Ne	w E Delete	📄 Pending 👻

13. Extending the due date requires the user to insert text into the notes field. We expect the Approver to list the reason why they felt it necessary to add the extra time.

	File T	ext 📴 History	🛯 Attachments	🕕 Details	Duick Info	🕞 Su	p Info1	🕞 Sup Info2	🛛 Approvals (3)	
# Approver Name Escalation Date App		Approval S								
	*	Matt Cichon	2/19/06	[Disapproved		otes			
►	1	Jon Johansen	2/19/06	F	Review Requeste	Т	his comp	any has until Ma	irch 15, 2006 to fax me	e all
	2	Kevin Gill		F	Pending Request	n A	ecessary	/ paperwork. If	I do not have the	
							ocumenta his applica	ation In my name	at that time, we will ca	
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						D	elegate A	Approvers		
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DISAPPROVING A FILE

14.

6)	Approve a M Allow Short Located at 5	fodification of an E Term Commercial F 000 Gabelich	xisting Condit Parking at Vel	tional Use Permit i terans Stadium Pa	(CUP) to Age Na Date Final Action	
	File T	ext 🔅 History	💧 Attachments	🔂 Details	/ Quick Info	🕞 Sup Info1 🕞 Sup Info2 🥑 Approvals (5)	
	#	Approver Name	Escalation	Date	Approval S	Notes	
	1	Matt Cichon	2/19/06	C	Delegated	Notes	
►	1	Jon Johansen	2/19/06	[Delegated Review	We will not modify this permit at the current time.	
	2	Kevin Gill		F	Pending Request		
	3	Merianne Nakaga	W/R	F	Pending Request		
	4	Larry Herrera		F	Pending Request	æ	,
						*Action	<u> </u>
						Disapproved	11
						Disapproved	
						Delegate Approvers	. III
						•	
						Save	
•						🔁 Manage 🙀 Approve	
	¥ Ado	d Sequence 👻 🛛 🔞) Initiate 🔚 Sav	/e As 📕 P	ause 🚳 Cance	el 2 Of 5 📑 Save 📄 New 📴 Delete 📄 Pending 🗸	