# How to Review and Approve Legislation Using Legistar
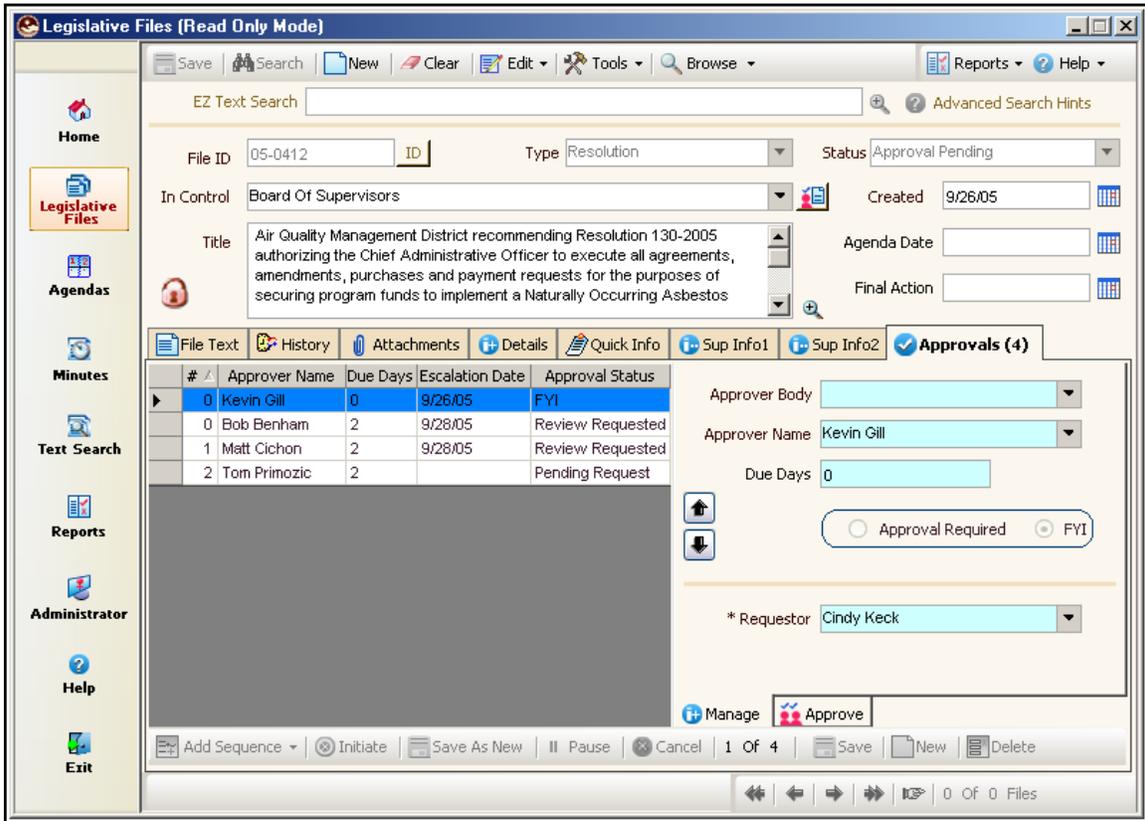
## *Opening Legistar*

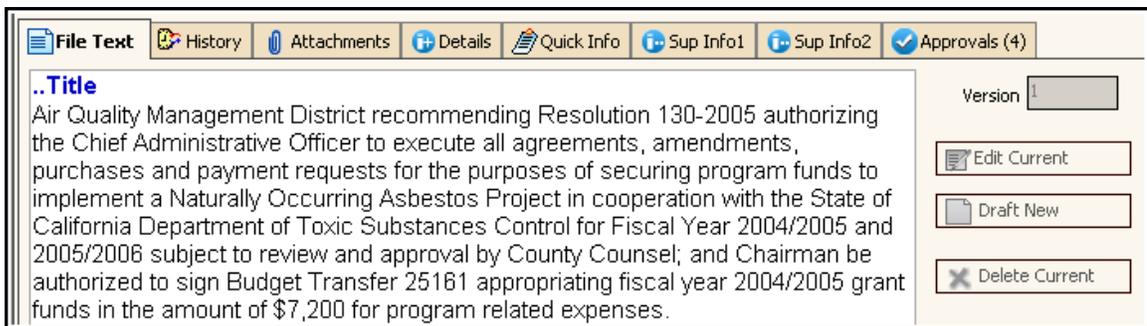1. Log into Legistar using your Username and Password.



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)

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".



4. After Reading the text, <u>return to the Approval tab</u> 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.
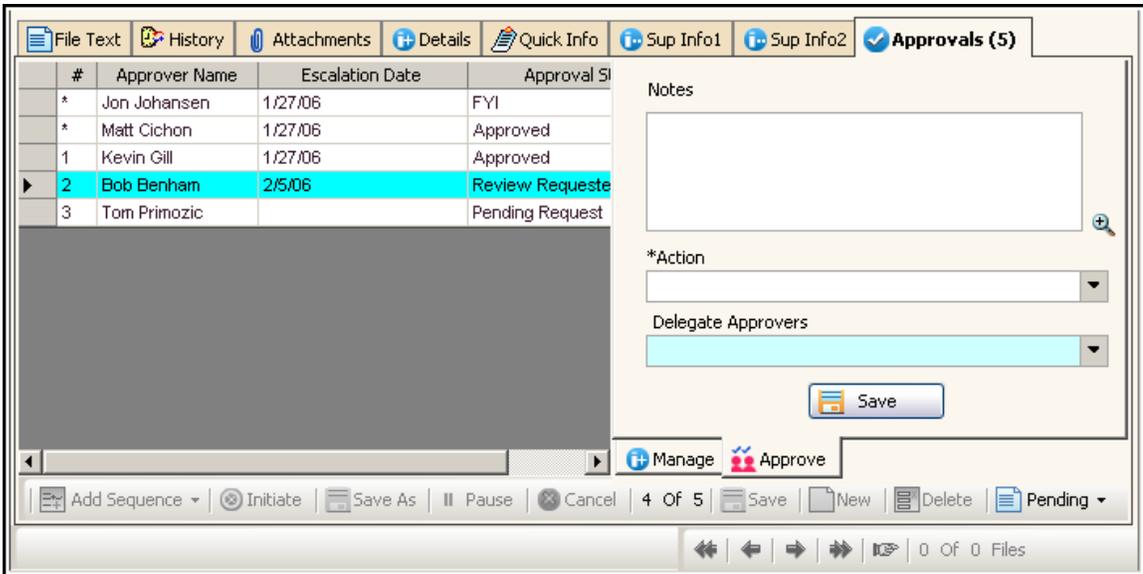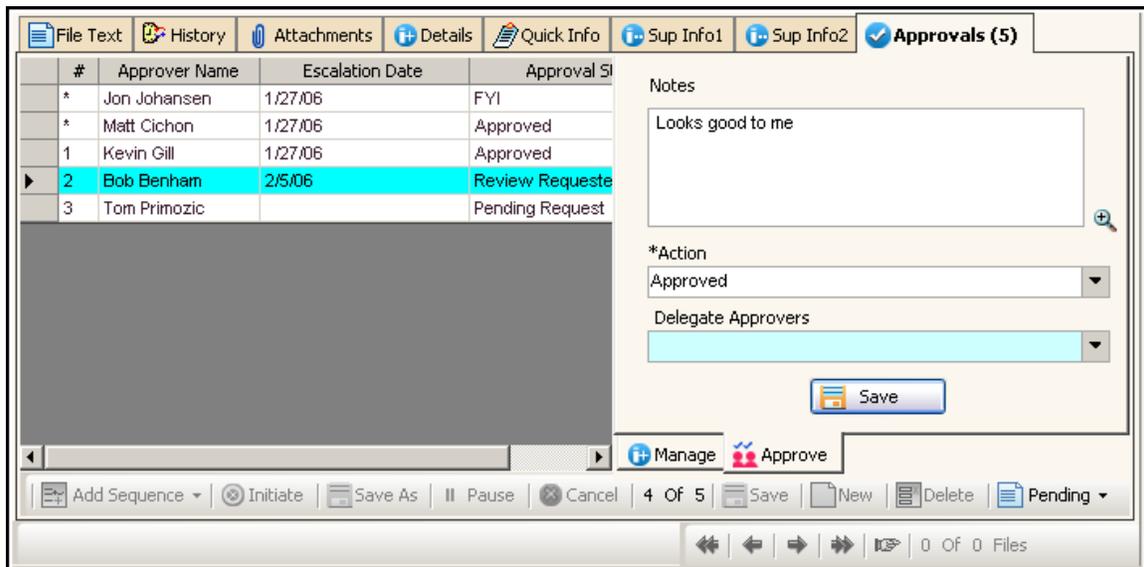
6. After the clicking "Approve" button, the approver is now free to enter their results

**\*** 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.

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.
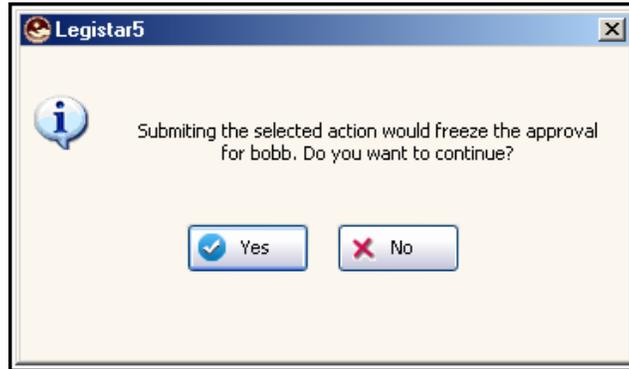


9. The file is now assigned to the next person on the list for approval, and the Approval status will be updated.



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
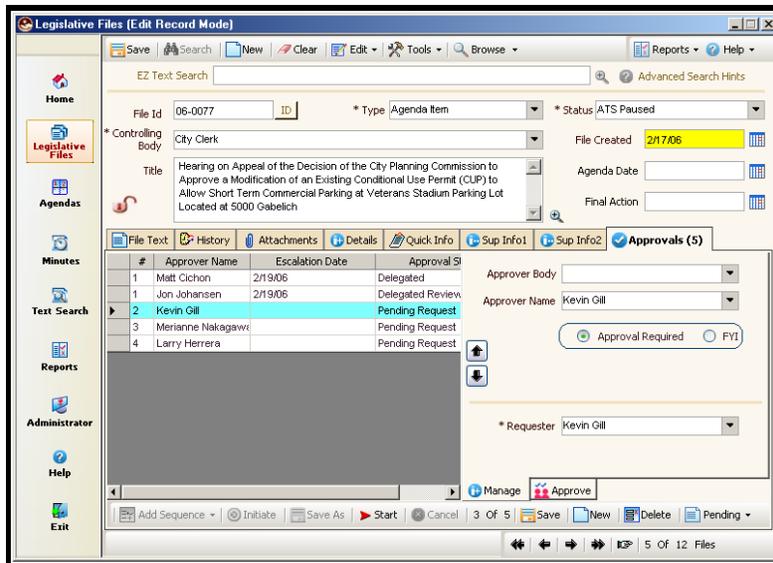
## PAUSING A SEQUENCE

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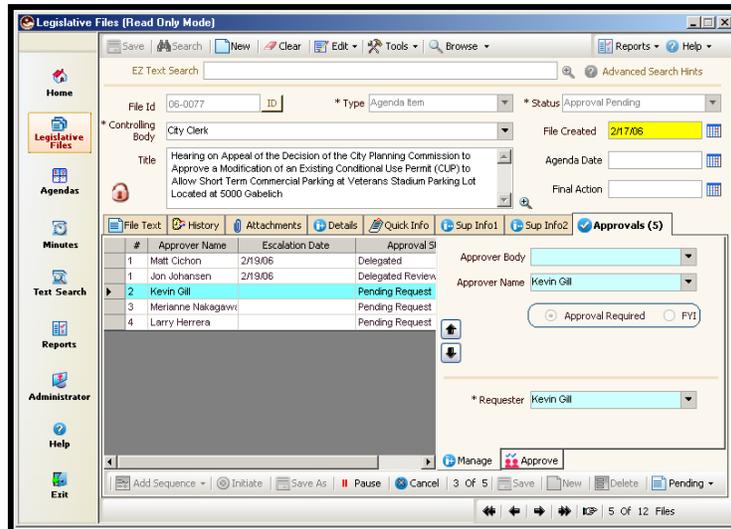


2. Start by going to the bottom portion of the screen and clicking on the "Pause" button.



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)

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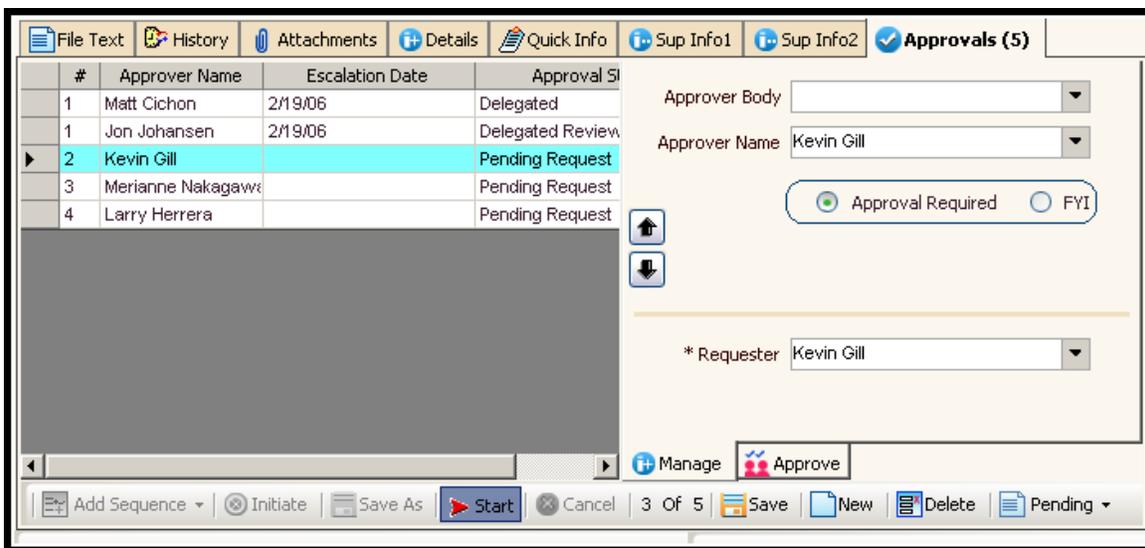


5.  The file will not revert back to the status that has been set for the approvals process, and the "Start" button will return to being the "Pause" button. (Note: Active buttons display what the user can do.)

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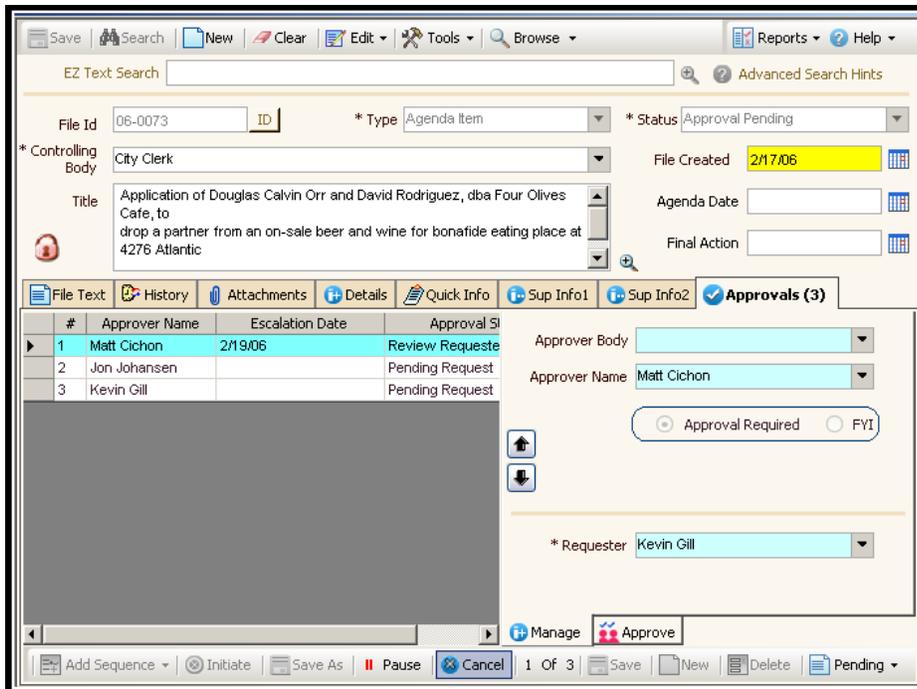
7. When cancel has been chosen, the overall status of the file will change, and emails will be sent to each individual who has been notified of the file to inform them of the cancellation (Notice the new Status for the file).
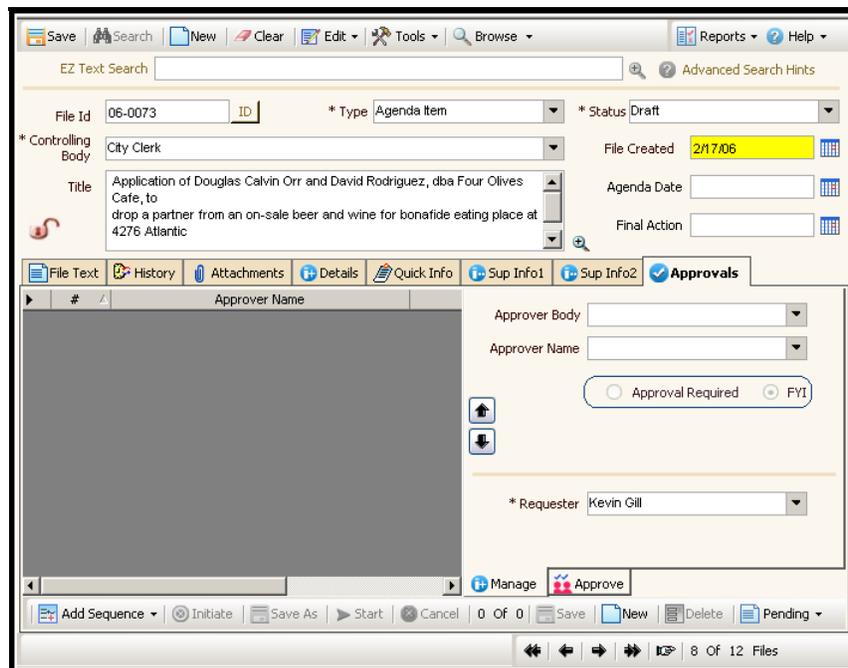


8. If at a later time, this file is needs to begin the approvals process anew, simply add another sequence and initiate it.

**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.
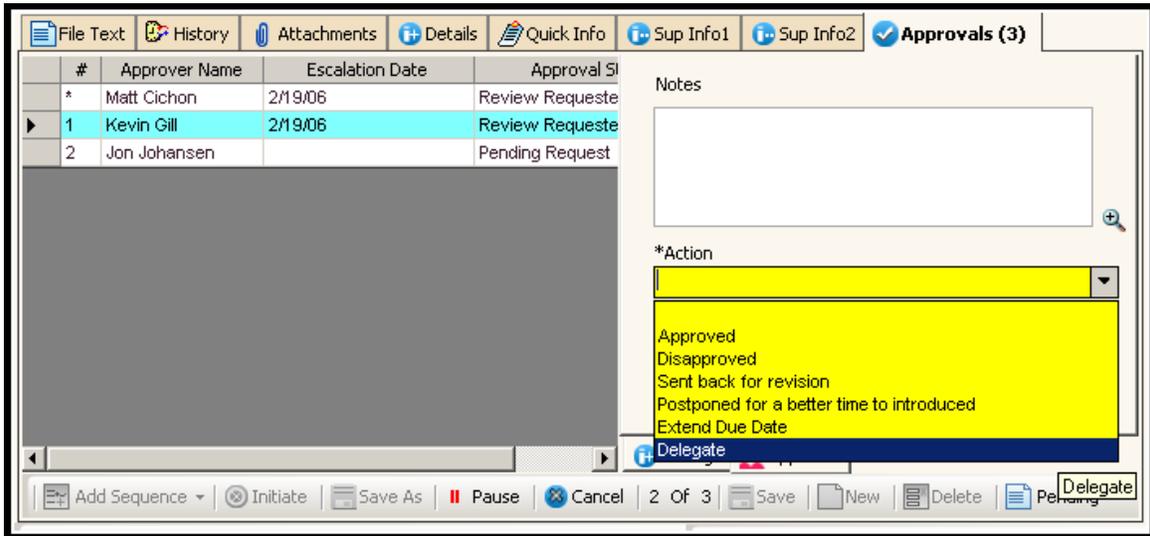


10. When the action of delegate is chosen from the action list, the Delegate Approvers box becomes active. At list time the Approver can choose from a list of available approvers the individual they wish to pass possession of the file too.



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.
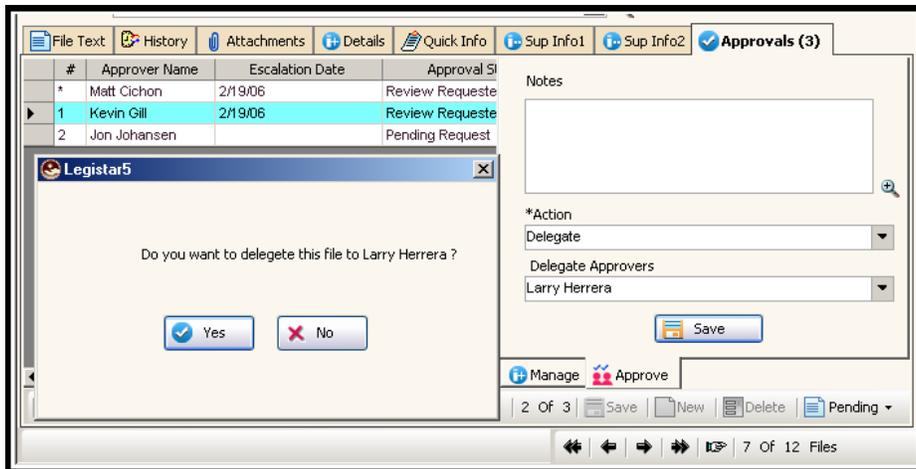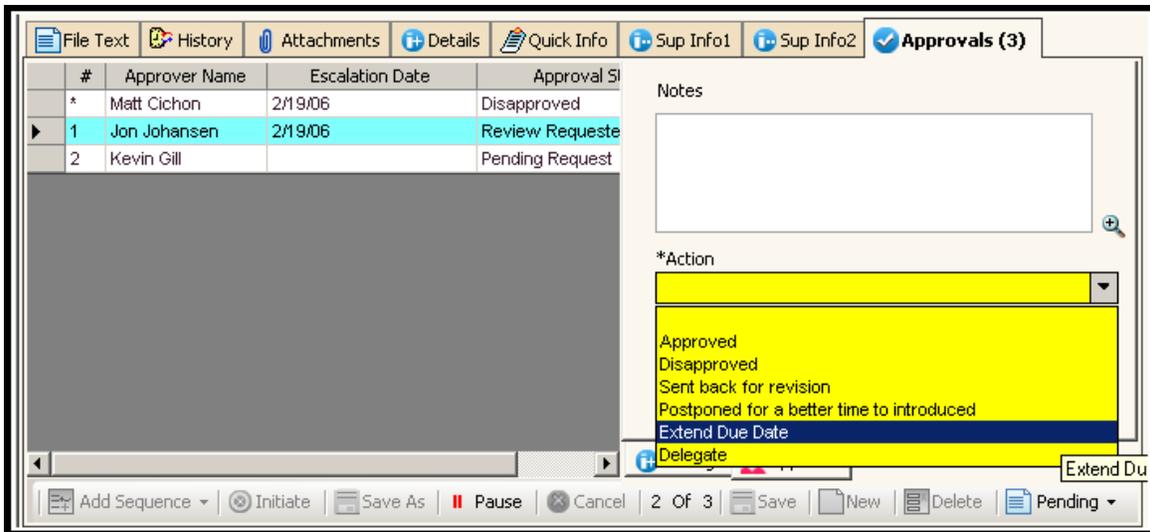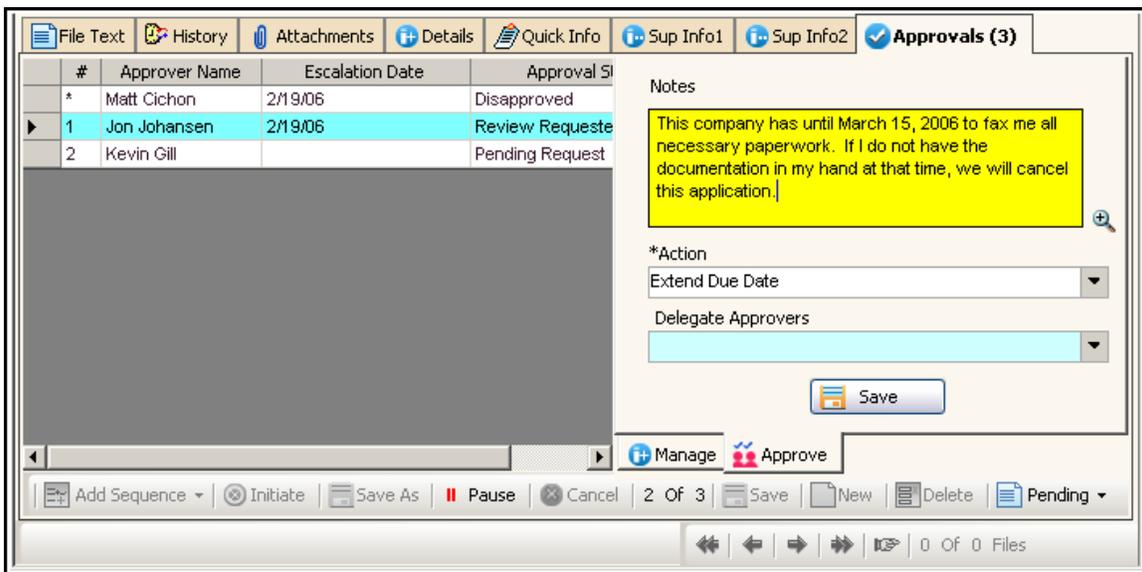
**View of screen after delegation.**
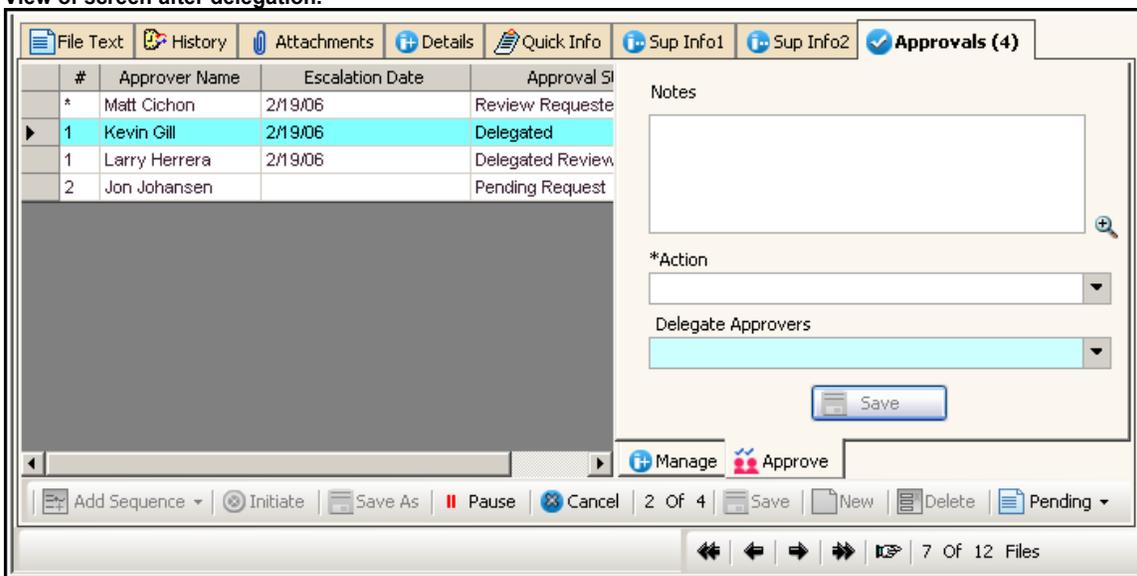


## EXTEND DUE DATE

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.

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.



**DISAPPROVING A FILE**

14.