

Legistar Drafting Agenda Items/Files

Providence, RI.

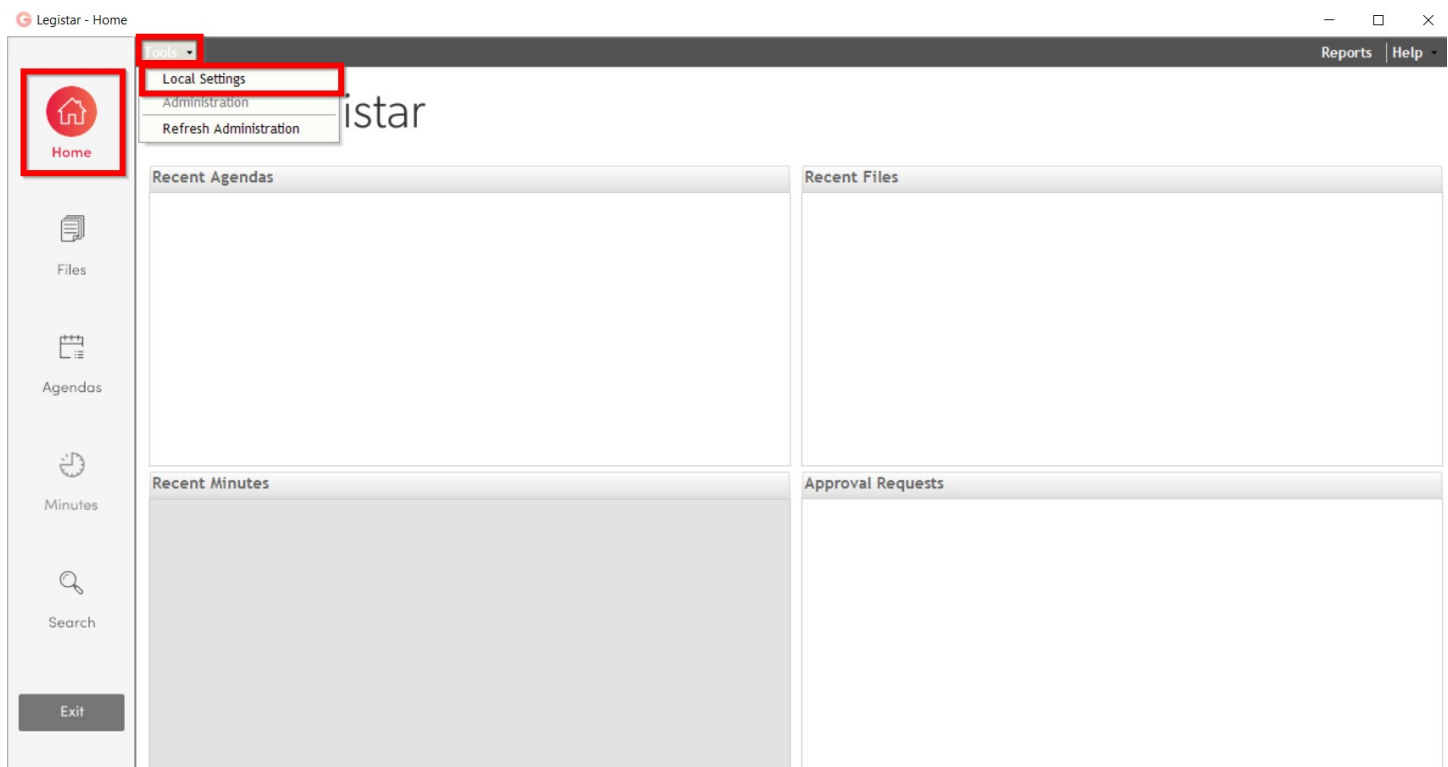
Overview

This quick reference guide provides instructions on how to draft an Agenda item. The drafting process in Legistar is the same for any type of Legislative File or Agenda Item you create. Within the Legistar workflow, anyone who drafts files and creates agenda items is called a “Drafter”.

Before drafting your first Agenda Item, ensure that key Local Settings are configured correctly.

Each individual user has access to **Local Settings** that will autofill certain fields throughout the Files module for that individual user. Local Settings is also where users can change their password. While there are many Local Settings available, the Local Settings detailed in this guide are specific to the needs of a Drafter.

1. To access Local Settings, click the **Tools** menu on the **Home** screen and select **Local Settings**.



2. On the **Personal Settings** tab, click the **Legislative Files** section. Here you can set default settings to autofill in the Files module.

NOTE: As you click on each menu, the Description on the right will give you more information about what that setting controls.

- **Default Body Sponsor:** If you would like Legistar to autofill a specific meeting body on the **Associations** tab in the **Sponsors** field, select that body here. This will not be used.
- **Default File Controlling Body:** Set the default Meeting Body that you would like to autofill in the **In Control** field when you click **New** to create a new Agenda Item – for most Legistar users, this should be **City Council**.
- **Default File Status:** This should always be set to **Draft**. Do not make changes to this setting.
- **Default File Type:** File Type = Type. The default Type for Drafters should be set to **Resolution**.
- **Default Name Sponsor:** If you would like Legistar to autofill a specific individual's name on the

Associations tab in the **Sponsors** field, select that person here.
To apply any changes, you must click Save.

Directions to change your **password** in Local Settings can be found at the end of this guide.

Step 1: Create a New Agenda Item

1. Click **Files** from the left-hand navigation menu to open the **Files** module.
2. Click **New**.
3. The **File ID** field will auto-populate and should not be edited. Drafters do not have permission to edit this field.
4. The **Type**, **Status**, and **In Control** fields auto-populate with your Local Settings.
 - **Type** will fill in with the default type set by system, but Drafters will be able to edit as needed.
 - **Meeting Type** should be **City Council** and should not be changed. This field is required.
 - **Leave the Status as Draft** – the Status will be auto-updated as the item moves through the approval workflow. *Drafters do not have permission to edit this field.*
 - The **File Created** field auto-populates with today's date, which should not be changed.
5. Select the **Agenda Date** (*it is required*). Click the calendar icon next to the Agenda Date field or use your keypad to type in the date.
6. You will not be able to type directly into the **Title** field. This field will auto-populate by the Rich Text Editor you work with in Step 2.
7. Leave the **Final Action** field blank. This field will be auto-populated later.
8. Click **Save**.

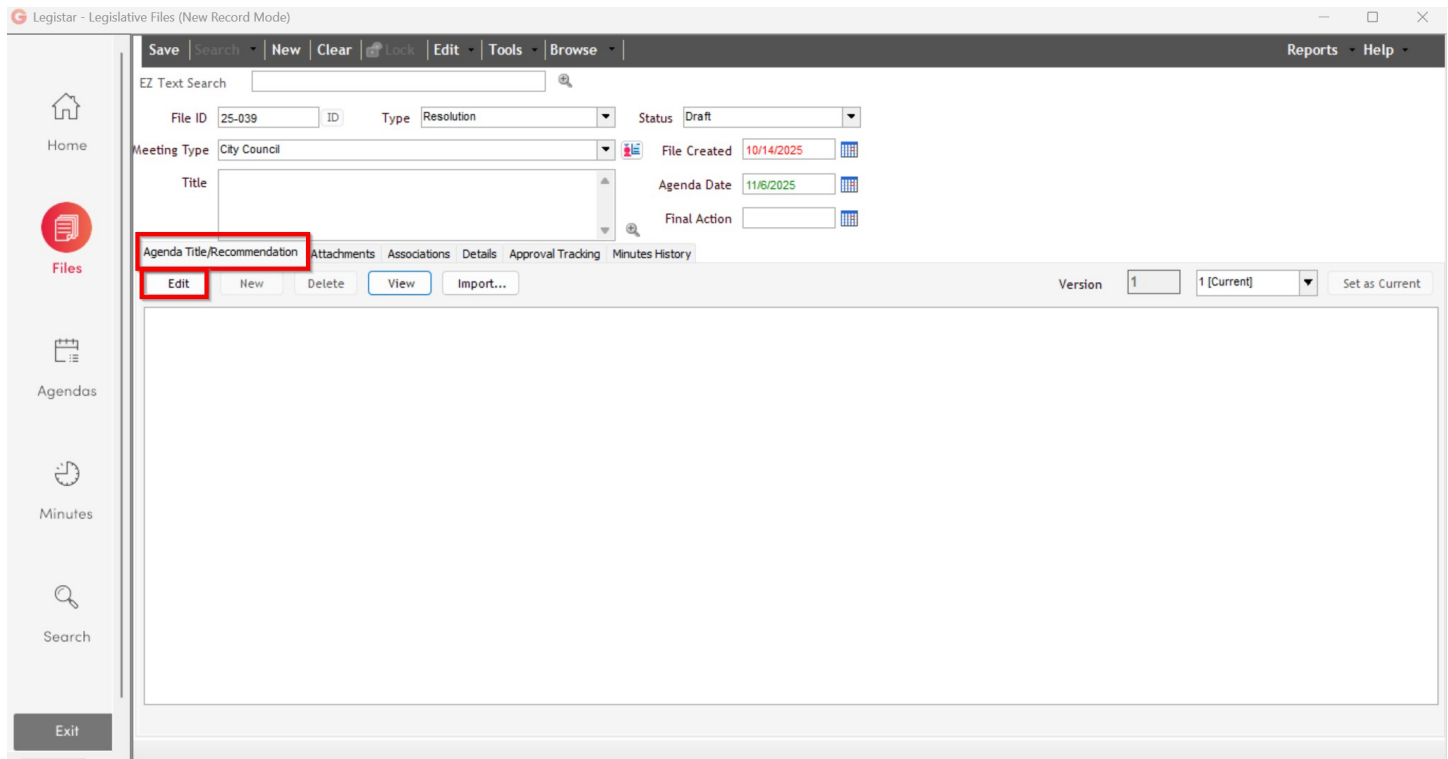
The screenshot shows the Legistar Legislative Files (New Record Mode) interface. The 'New' button is highlighted in red. The 'File ID' field contains '25-039'. The 'Type' dropdown is set to 'Resolution'. The 'Meeting Type' dropdown is set to 'City Council'. The 'Agenda Date' field is set to '11/8/2025'. The 'Status' dropdown is set to 'Draft'. The 'File Created' field shows '10/14/2025'. The 'Final Action' field is empty. The 'Agenda Title/Recommendation' tab is selected. The 'Version' field shows '1' and '1 [Current]'. The 'Exit' button is visible in the bottom left corner.

Step 2: Agenda Title/Recommendation Tab

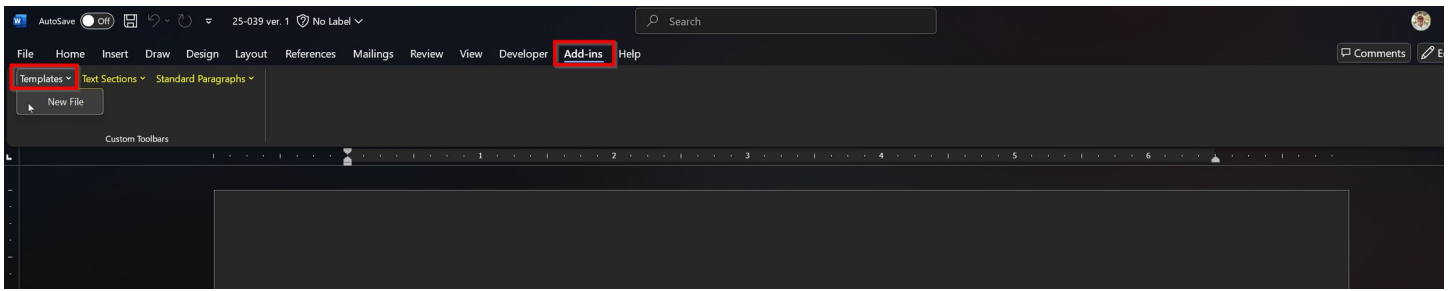
The **Agenda Title/Recommendation** tab displays the text of the Agenda Item/File. The following steps explain how to enter file text by accessing a Microsoft Word document template designed by your Core Team. For certain Legistar reports to pull in data properly, the Microsoft Word document templates are specifically formatted.

Option 1: Click Edit to access a blank copy of a Text File Template in Word:

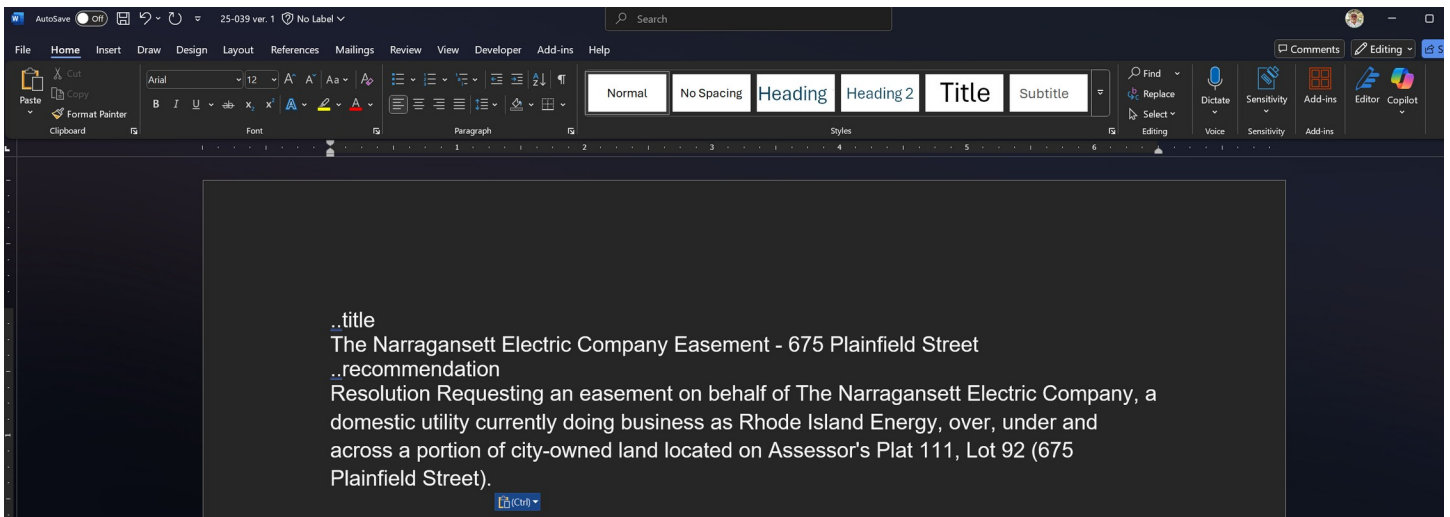
1. On the **Agenda Item Request** tab, click the **Edit** button. Microsoft Word opens.
 - **New** – Allows you to create a new version of the legislative file. (**Drafters will not be able to do this**)
 - **Delete** – Allows you to delete the current version of the file text and go back to the old version. (**Drafters will not be able to do this**)
 - **View** – opens the file .dotx file
 - **Import** – See instructions below.



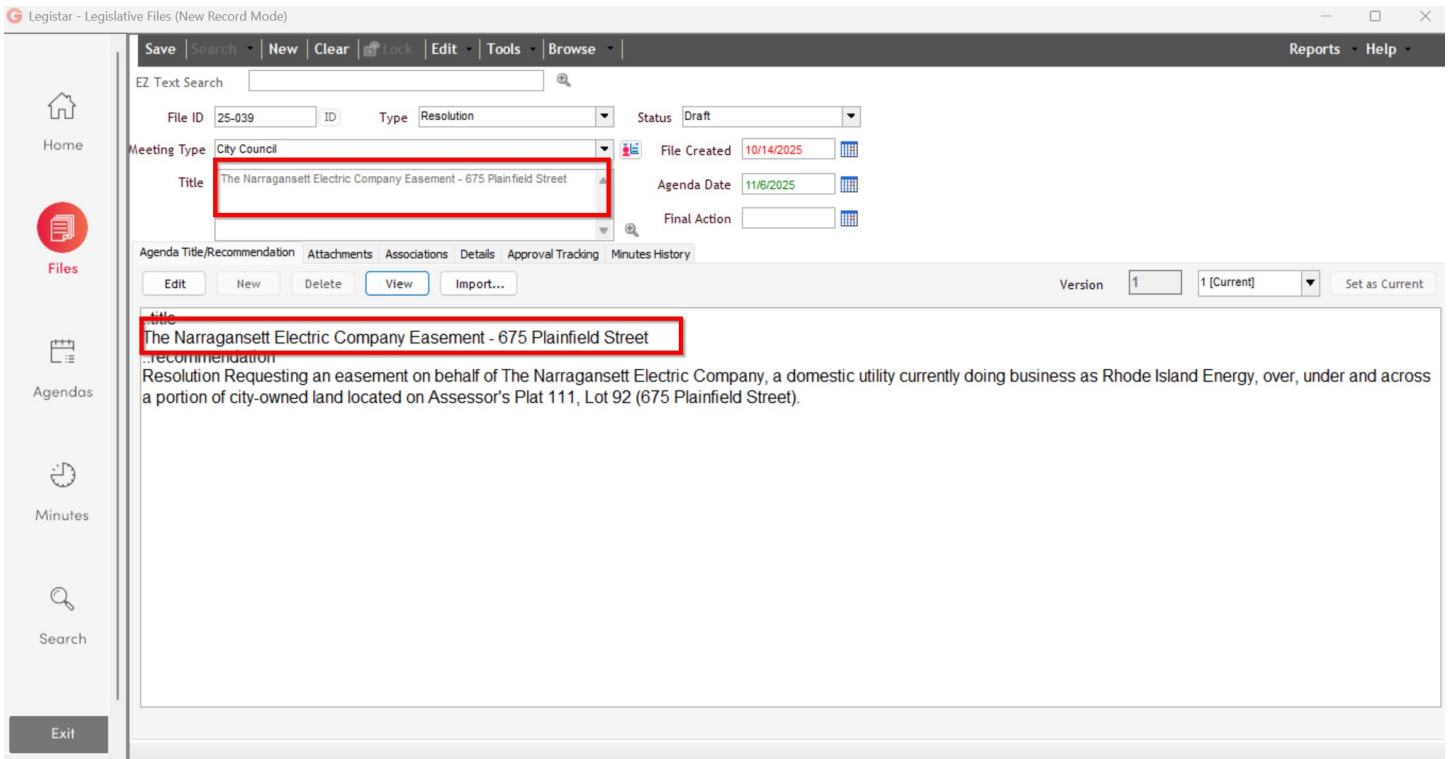
2. Once Microsoft Word opens, click the **Add-Ins** tab at the top right on your ribbon.
3. Next click **Templates** at the top left and select the appropriate template. More templates may be added in the future. Please disregard the Text Sections and Standard Paragraphs options, which are highlighted in yellow below.



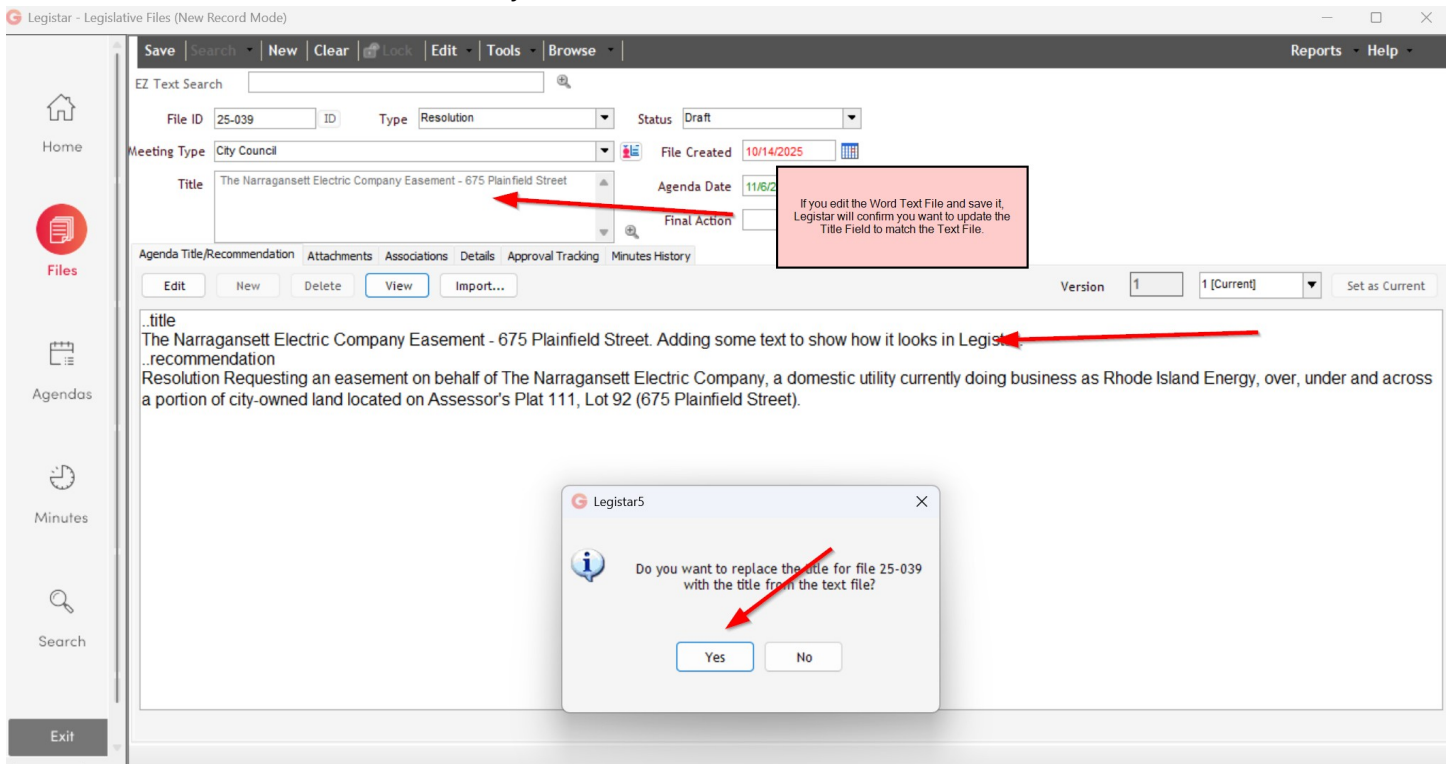
4. A pop-up will ask for confirmation that this will replace and save the current (blank) Word document. Click **Yes** to continue.
5. Once the template loads, enter or edit the appropriate information in the applicable fields. **Do not delete the “.body”, “.title”, or “.end” text.** These “tags” are coded to populate in the Title field and on certain reports.
6. Click the small **Save icon** in the top left of your Word window.



7. Click the **X** at the top right of your Word window to close Microsoft Word and return to Legistar.

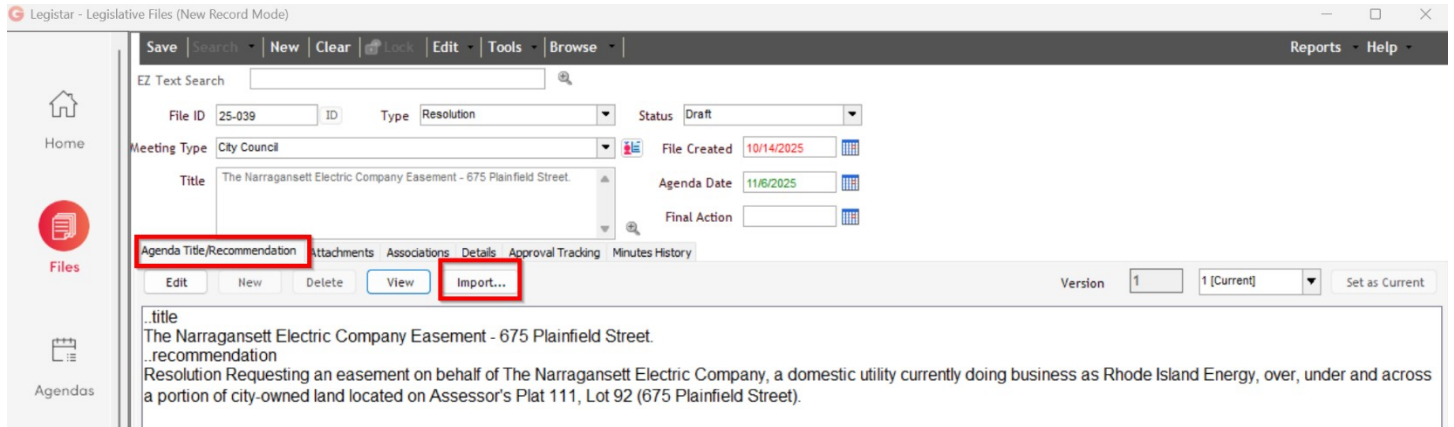


8. The Word document you filled out will load into Legistar. You will now see the **Title** field populate with the **Agenda Title/Recommendation** information from the document, and the lower window allows you to view the entire Text File text (see screenshot below). You cannot type or make changes in the viewer window on the Text File tab.
9. Click the **Edit** button again to make changes to the Word document. *Do not type directly into the Title box.*
NOTE: If you edit the Text File by opening Word again and make any edits to the “.title” section, Legistar will ask for confirmation that you would like to update the Title field with the new text. In most cases, the answer will be “yes”.

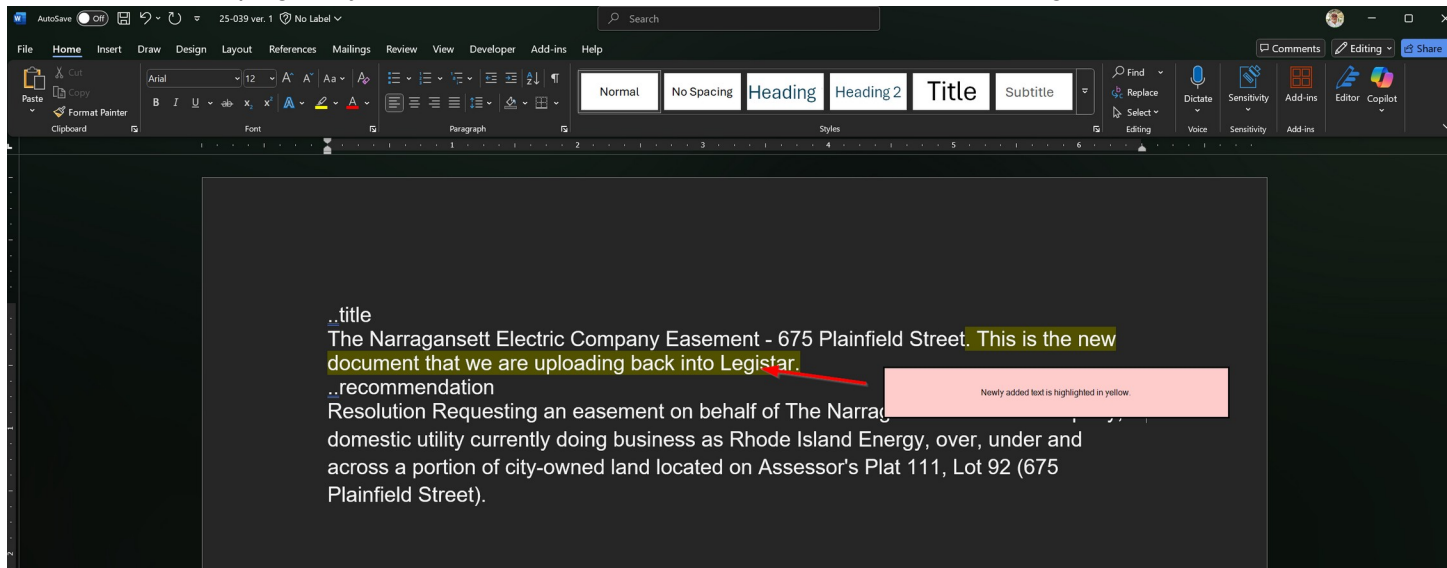


Option 2: Click Import to load a previously completed Text File into Legistar:

- On the **Text File** tab, click the **Import** button. Your computer's local files open. Select the completed template you want to upload into Legistar and click **Open**. *This document must be a .dot document.*
 - NOTE:** Drafters must ensure they have the same “..motion text”, “..title”, and “..end” code tags in the same locations as the templates available through Edit (option 1). If these tags are missing or in different locations on the imported document, the Agenda and other File/Agenda Item reports will display inconsistently.



- The Word document opens. If any edits/additions are needed before loading into Legistar, edit as needed. **Do not delete the “..body”, “..title”, or “..end” text.** These “tags” are coded to populate in the Title field and on certain reports.
- Click the small **Save icon** in the top left of your Word window.
- Click the **X** at the top right of your Word window to close Microsoft Word and return to Legistar.



- The Word document you filled out will load into Legistar. There will be a prompt to confirm we want to save the imported text into Legistar. Select Yes to save it in the system. You will now see the **Title** field populate with the Agenda Title and Recommendation information from the document, and the lower window allows you to view the entire Text File text (see screenshot below). You cannot type or make changes in the viewer window on the Text File tab.

- Click the **Edit** button again to make changes to the Word document. *Do not type directly into the Title box.*
NOTE: If you edit the Text File by opening Word again and make any edits to the “..title” section, Legistar will ask for confirmation that you would like to update the Title field with the new text. In most cases, the answer will be “yes”.

Step 3: Attachments Tab

You can add attachments of any file type, such as MS Word, Excel, PowerPoint, PDFs, text files, and images. Multi-media format files cannot be added as attachments. Non-PDF attachments will be converted to PDF when they are published to InSite. Clicking **the arrow next to Attach** will allow you to attach hyperlinks or scans. We recommend a maximum individual attachment size of 100 MB - anything larger should be compressed or split into multiple files. Attachments that are too large may cause issues when generating the Agenda Packet. The public may also have difficulty opening large attachments.

Warning! Attachment names should never include special characters (such as #, \$, or ^). The Attachment names can appear as hyperlinks on the agenda and will be included in the Agenda Packet.

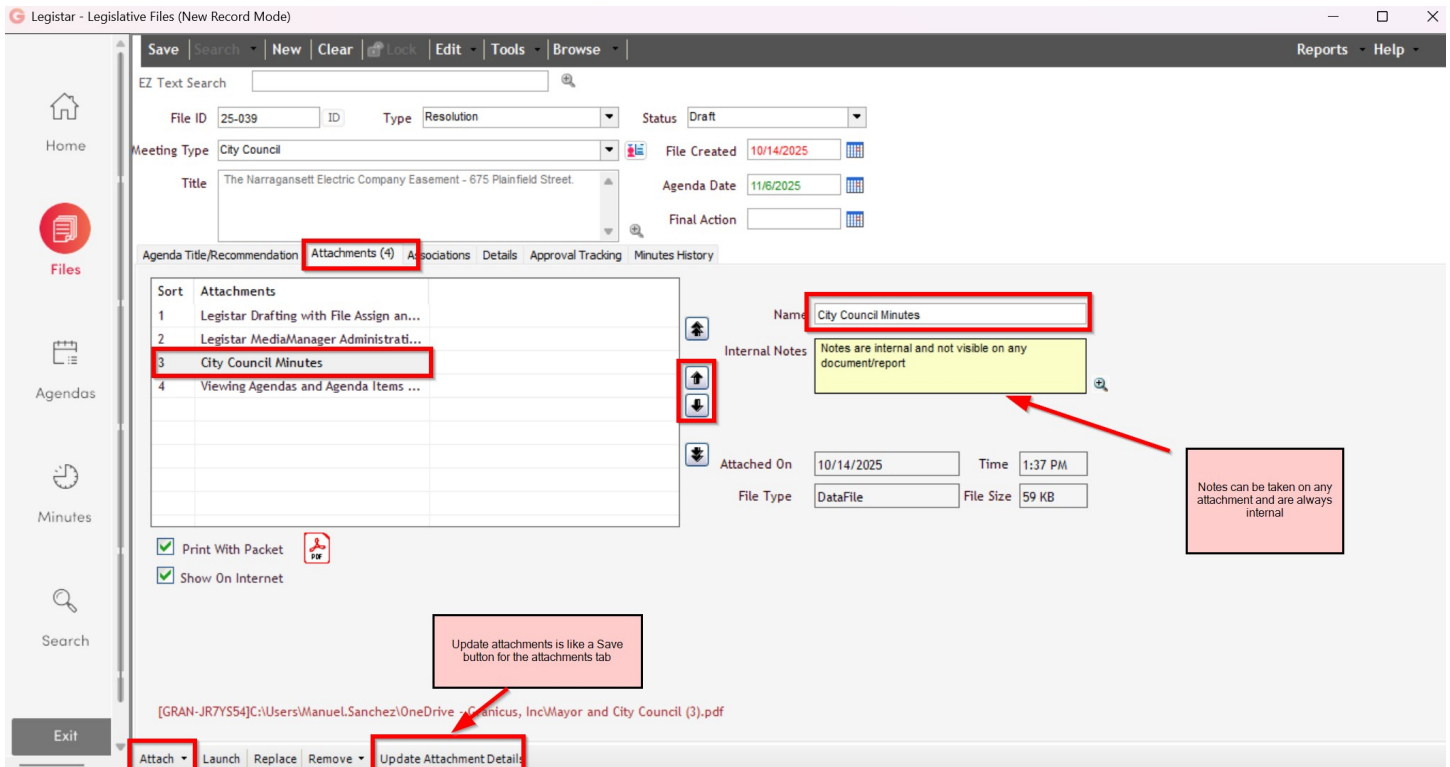
- Click the **Attachments** tab.
- To attach files, click **Attach** at the bottom left-hand corner of the window, locate the file(s) for import, and click **Open**. The file is now attached to the Agenda Item. For more options, click the **Attach dropdown arrow**, and continue to the next step.
- You can rename the attachment by entering the new name in the **Name** field and then clicking the **Update Attachment Details** tab at the bottom left of the screen.
- To **delete** an attachment, select the attachment and click **Remove** at the bottom left.
- To **open** an attachment, you can **double-click** it. Or select the attachment and click **Launch** at the bottom left.

After opening or launching an editable format attachment, you can edit the document. To save your changes back to Legistar, click the **Save icon** and **close** out of the attachment.

NOTE: Changes made to attachments in Legistar do NOT update the local copy saved to your local drive.

- To **replace** an attachment, select it in the grid then click the **Replace** button.

- The **Internal Notes** field allows you to write internal-only notes that do not print on the published agenda or become public at any time. They are internal to the selected attachment only and will only be visible within Legistar.
- Reorder the list of attachments** by highlighting the desired attachment and using the arrows to the right of the grid. Click **Save** when the attachments are listed in the proper order.



Step 4: Associations Tab

The **Associations** tab allows you to add details to this Agenda item that will associate a Sponsor (Presenter) and reference to this File within Legistar and InSite.

Note: You will be using **Related Files**. The process for selecting Associations is the same for each category – step by step directions are listed after category descriptions.

Code Sections: Providence is not using this Association.

Indexes (Categories): **Providence is planning to use this Association.**

Sponsors: this allows for the sponsor(s) of an item to be displayed on the report (Staff Report and/or the Agenda. It can also be displayed on InSite. Providence will use this field to indicate any elected officials who have sponsored the item.

Related Files: Associating another File to this Agenda Item can create a hyperlink to the related File on InSite and provides a reference for other items that pertain to this one. **NOTE:** These are like “Relationships”.

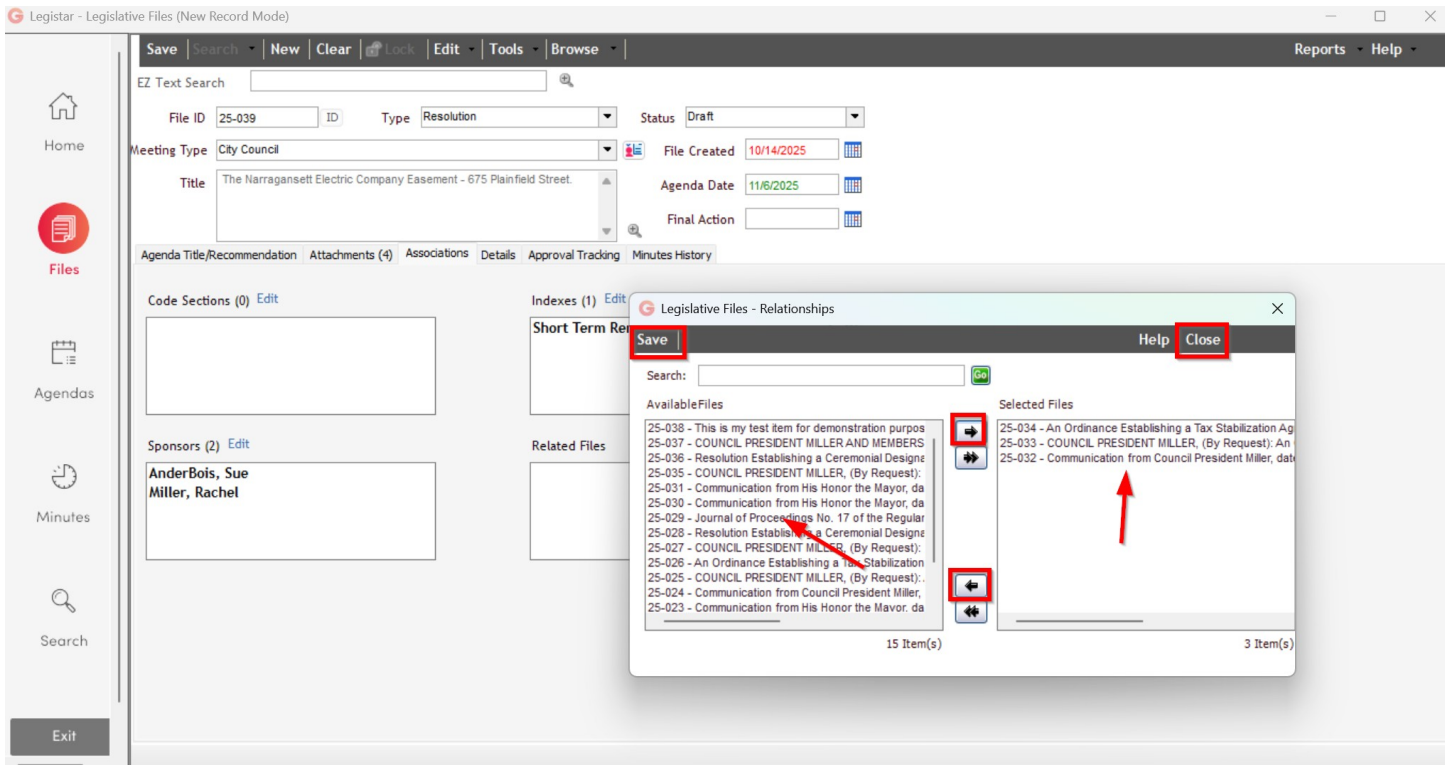
To add Associations of any category to your Agenda Item:

- Click **Edit** next to the category you would like to add an association in.
- Select your Associations from the **Sponsor** and/or **Related Files** column on the left – multiple can be selected by holding down Shift or Control. Use the Search box at the top to find a specific item in the Available list.
- With the selections highlighted in the Available column, use the **single right-pointing arrow** to move your selections into the **Selected Sponsor and/or Related Files** column on the right. The double right-pointing arrow will move the entire list of Available Associations to the Selected column.
- When your Selected column is ready, click **Save**. Then, click **Close**. Your selected Associations will appear in their

respective field.

The screenshot shows the Legistar Legislative Files interface in 'New Record Mode'. The main window displays file details for File ID 25-039, Type Resolution, Status Draft, Meeting Type City Council, and Title 'The Narragansett Electric Company Easement - 675 Plainfield Street'. A dialog box titled 'Legislative Files - Indexes' is open, showing a search field and two panes: 'Available Indexes' (empty) and 'Selected Indexes' containing 'Short Term Rentals'. A red arrow points from the 'Short Term Rentals' item in the 'Selected Indexes' pane to the 'Sponsors' field in the main window. The 'Save' button in the dialog box is highlighted with a red box.

The screenshot shows the Legistar Legislative Files interface with the 'Legislative Files - Sponsors' dialog box open. The main window shows the same file details as the previous screenshot, but the 'Sponsors' field now contains 'AnderBois, Sue' and 'Miller, Rachel'. The dialog box shows a search field and two panes: 'Available Sponsors' containing 'Espinal, Pedro' and 'Howland, John', and 'Selected Sponsors' containing 'AnderBois, Sue' and 'Miller, Rachel'. A red arrow points from the 'Howland, John' item in the 'Available Sponsors' pane to the 'Sponsors' field in the main window. The 'Close' button in the dialog box is highlighted with a red box.



Step 5: Details Tab

The **Details** tab contains additional information about the agenda item.

Not Viewable via Insite: This will remain checked until the agenda is published. Once the agenda is published the system will uncheck this box automatically. Drafters will not have the ability to edit this field.

Department: Choose the corresponding department item is coming from. Will fill in the department the drafter has set in their Local Settings, if applicable.

Entered By: This field should auto-populate the drafter or author's email address. NOTE: if your email does not appear in this field or is incorrect, please contact your core project team.

Internal Notes: This is an optional field where you can enter notes that will not appear to the public.

Agenda Number: This field will auto populate the agenda item number once it is assigned during the agenda creation process.

Enactment Number: This number will be automatically assigned.

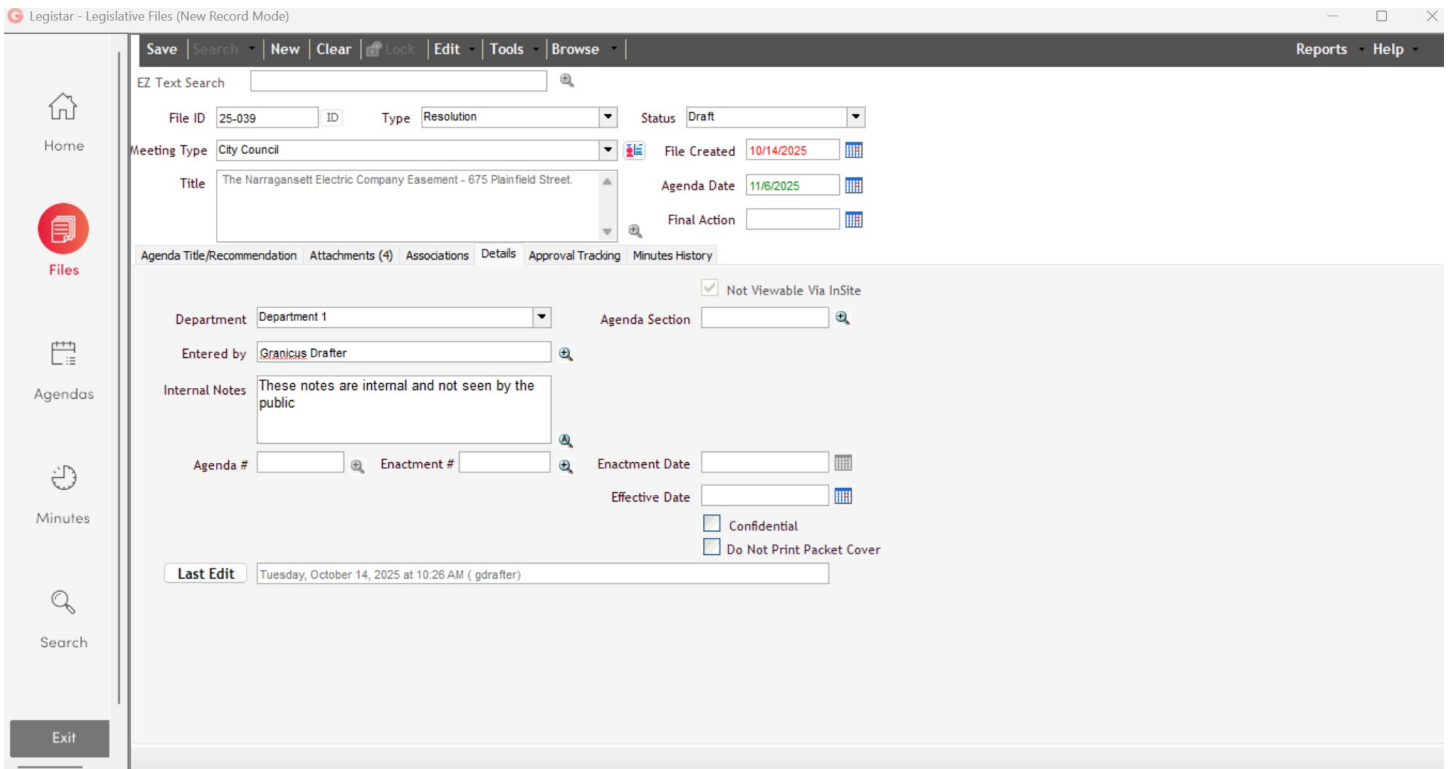
Enactment Date: The date the item is to be enacted and will be automatically assigned. (Drafters do not have access to this field.)

Effective Date: The date that the item takes effect if it is a date other than the agenda date. Always a Manual entry.

Confidential: This can be used to prevent users from viewing files marked as confidential in Legistar unless they are in a user group that has access.

Do Not Print Packet Cover: This allows you not to have a Cover Page print on your Agenda Packet for this item. The attachments will still show, just not the Cover Page.

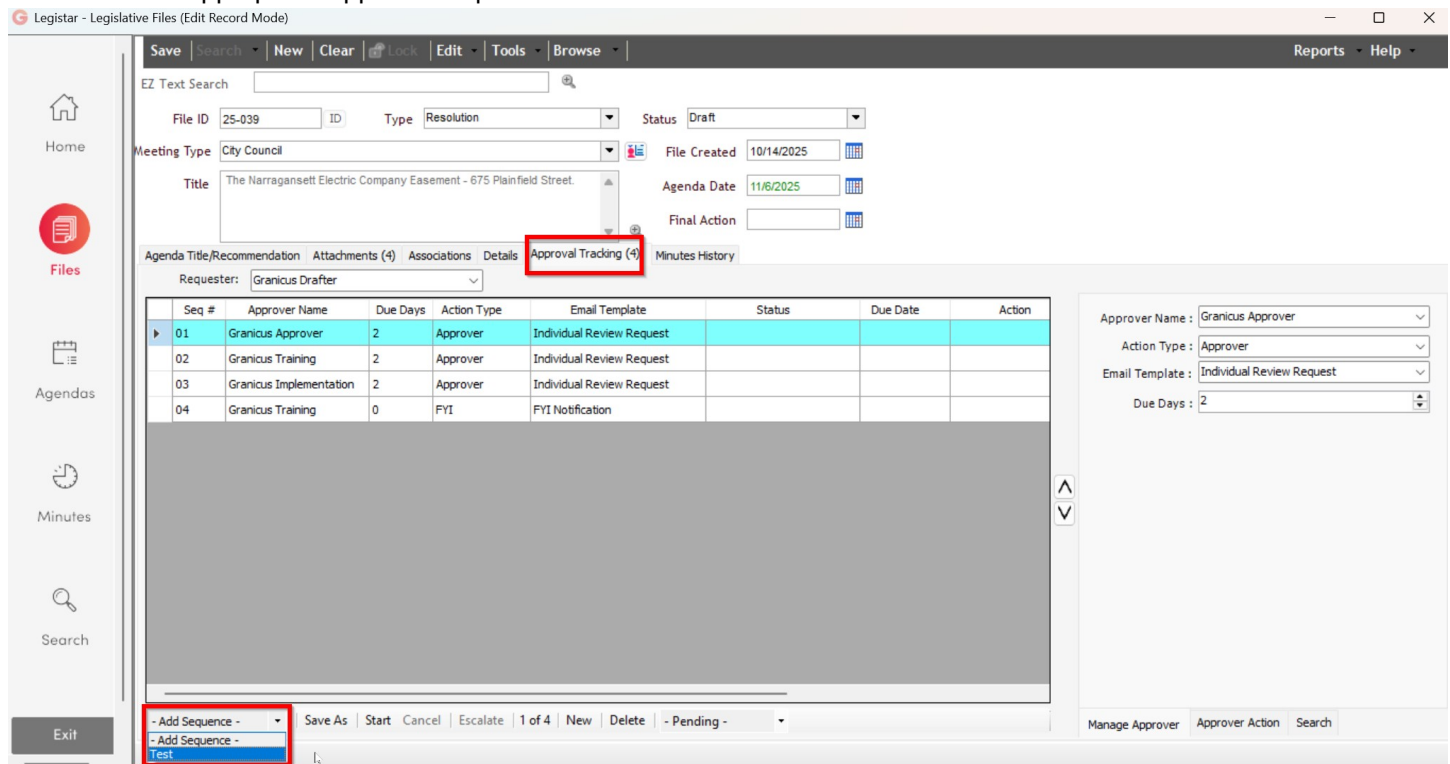
Last Edit – this is the files history. It tracks any changes or edits made to the item; from the time it was first created.



Step 5: Approval Tracking Tab

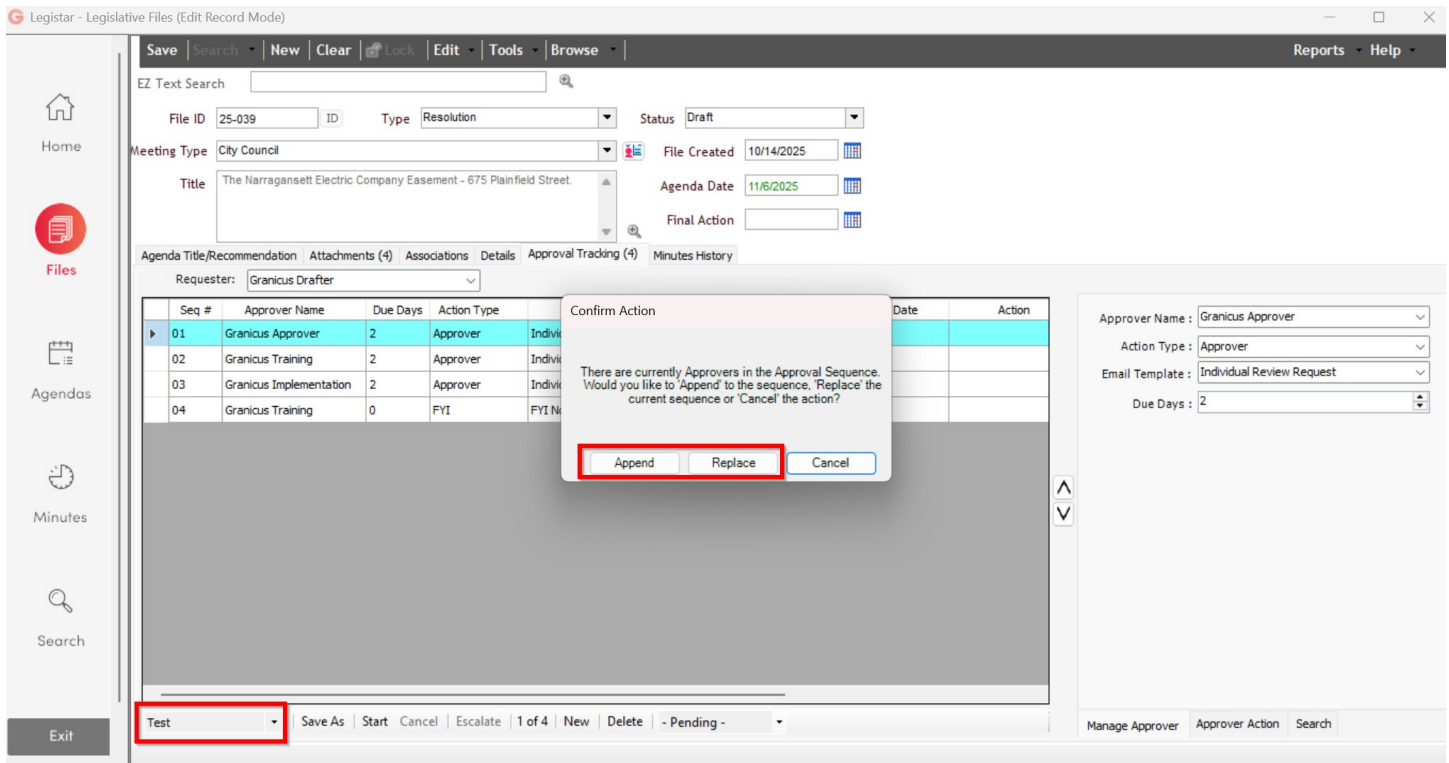
The **Approval Tracking** tab allows you to select an Approval Sequence and edit the sequence before the Agenda Item is submitted to Approvers.

1. Click the **Approval Tracking** tab.
2. Click **Add Sequence** is located at the bottom left of the screen.
3. **Select** the appropriate approval sequence from the list.



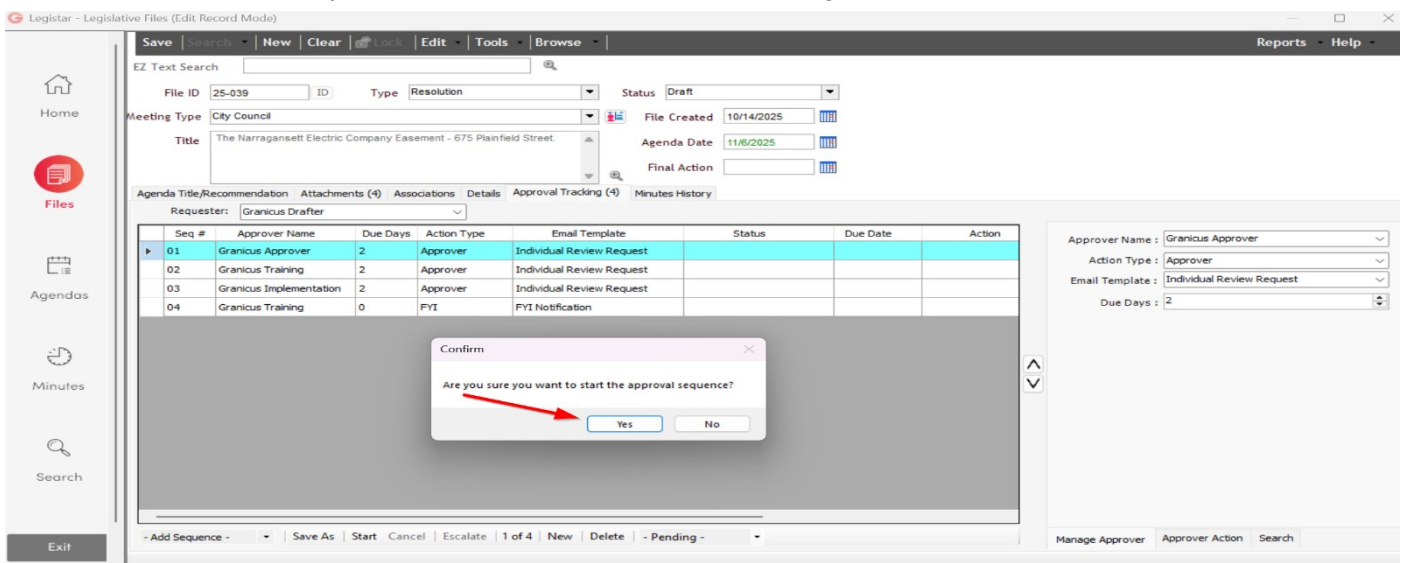
4. Once the sequence loads, it will contain the list of Approvers for this Agenda Item. **Drafters will be limited in their ability to edit the workflow.**

- If you accidentally selected the wrong sequence and need to correct it, click **Add Sequence**, click the intended sequence, then **Replace** to change the workflow.
- If you would like to combine multiple sequences to occur one after the other, click **Add Sequence**, click the intended sequence, then **Append** to add the second sequence after the first.



5. Click **Start** to begin the Approval Sequence. Click **Yes** in the pop-up to confirm you are beginning this Approval Tracking Sequence.

NOTE: Once you click Start, the button's label will change from "Start" to "Pause".



6. The **status** of the file will automatically update to **Approval Review**. The first Approver in the sequence will receive an email that the File is ready for them to review.
7. Once the Approval Workflow has been completed (status is "Agenda Ready"), the Drafter **will have permission to edit** the Agenda Item during the review process.

Legistar - Legislative Files (Read Only Mode)

Save Search New Clear Unlock Edit Tools Browse Reports Help

EZ Text Search

File ID: 25-039 ID Type: Resolution Status: **Approval Review**

Meeting Type: City Council File Created: 10/14/2025

Title: The Narragansett Electric Company Easement - 675 Plainfield Street. Agenda Date: 11/6/2025 Final Action:

Agenda Title/Recommendation Attachments (4) Associations Details **Approval Tracking (4)** Minutes History

Requester: Granicus Drafter

Seq #	Approver Name	Due Days	Action Type	Email Template	Status	Due Date	Action
01	Granicus Approver	2	Approver	Individual Review Request	Review Requested	10/17/2025	
02	Granicus Training	2	Approver	Individual Review Request			
03	Granicus Implementation	2	Approver	Individual Review Request			
04	Granicus Training	0	FYI	FYI Notification			

Approvers will not have the option to choose Cancel, New, or Delete. Only Admins have full access to these options.

Approvers: Granicus Approver Action Type: Approver Email Template: Individual Review Request Due Days: 2

Save As Pause Cancel **Escalate** 1 of 4 New Delete - Pending -

Manage Approver Approver Action Search

8. While the Agenda Item is in Approval Review, there may be times when the Drafter, or another user, needs to **Escalate** the workflow past an Approver and delegate the turn to that Approver's Alternate Approver (for example, if that Approver is on vacation and forgot to turn on their Out of Office setting). To **Escalate** to an Approver's Alternate, select the active Approver (whose name is **green and bold**) and click **Escalate** on the **Approval Tracking tab**. Confirm "Yes" in the pop-up. The Alternate Approver will be input into the sequence and become the active Approver.
 - **NOTE:** If no Alternate Approver has been programmed for that Approver, you will get an alert that no Alternate has been set up for this Approver. Reach out to your System Administrator for the next steps.

Legistar - Legislative Files (Read Only Mode)

Save Search New Clear Unlock Edit Tools Browse Reports Help

EZ Text Search

File ID: 25-039 ID Type: Resolution Status: Approval Review

Meeting Type: City Council File Created: 10/14/2025

Title: The Narragansett Electric Company Easement - 675 Plainfield Street. Agenda Date: 11/6/2025

Final Action

Agenda Title/Recommendation Attachments (4) Associations Detail Approval Tracking (5) Minutes History

Requester: Granicus Drafter

Seq #	Approver Name	Due Days	Action Type	Email Template	Status	Due Date	Action
01	Granicus Approver	2	Approver	Individual Review Request	Escalated for Inaction	10/17/2025	
02	Manny Sanchez	1	Approver	Individual Review Request	Escalated Review Req...	10/16/2025	
03	Granicus Training	2	Approver	Individual Review Request			
04	Granicus Implementation	2	Approver	Individual Review Request			
05	Granicus Training	0	FYI	FYI Notification			

Approver Name: Granicus Training

Action Type: Approver

Email Template: Individual Review Request

Due Days: 2

The name of the approver the item has been escalated to will appear in green

Save As Pause Cancel Escalate 3 of 5 New Delete - Pending -

Manage Approver Approver Action Search

Searching in the Files Module

Note: Searching may be limited based on user group permissions set by your designated Legistar Administrators.

1. You must be in **Search Mode** before you can locate a file; click the **Clear** button at the top of the screen at any time to return to Search Mode. This does not delete information; it simply removes all the information from the fields and sets you to Search Mode.
2. Enter search criteria in any of the fields or enter criteria in a combination of fields at the top of the screen (e.g., Agenda Category, Status, Agenda Type, Scheduled Meeting date, etc.).
3. Click **Search**. If there is more than one record found, click **Yes** to display all records.
4. Click a record in the list to open it.

EZ Text Search:

Enter keywords in the **EZ Text Search** field. Click the magnifying glass icon to open a text box for further defining your search. EZ Text Search only searches through legislative file text fields, and the text and titles of attachments; drop-down and date fields are not searched. Also, EZ Text only pulls up exact phrases to your search text.

Date Range and Wild Card Searching:

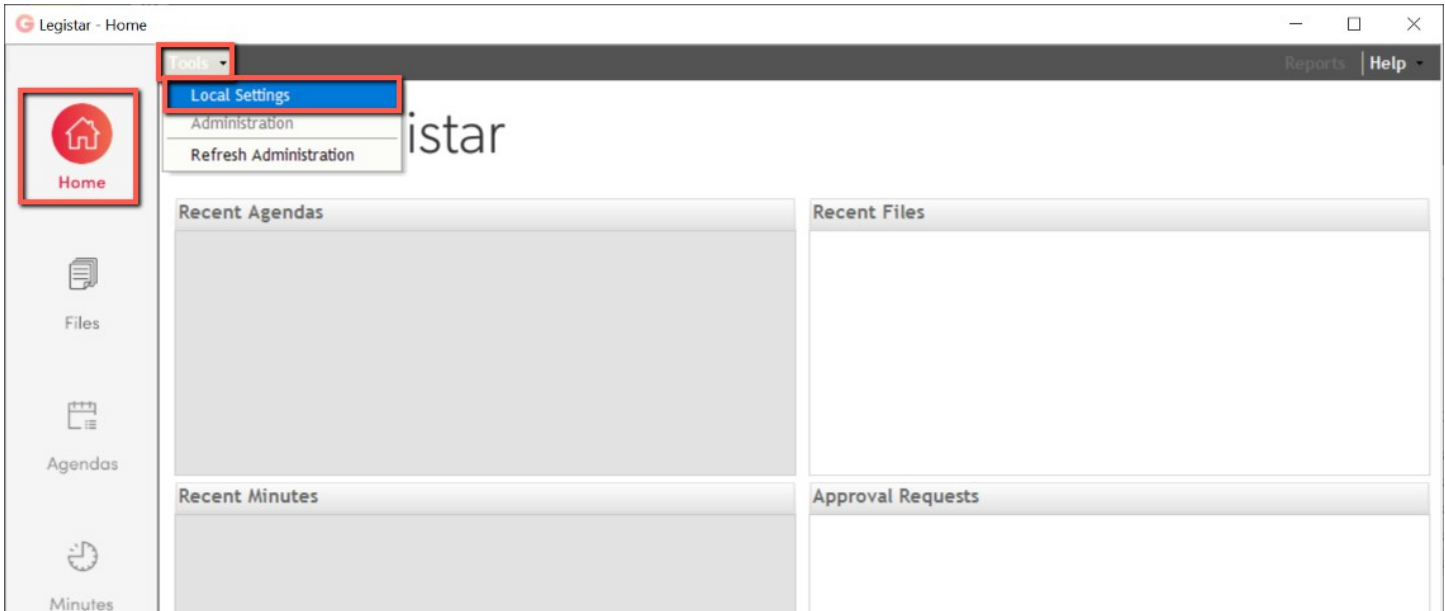
Within the Search menu in any Legistar modules, you can use the following date range search tools alone or in conjunction with the date entry shortcuts:

Item	Description
>	Enter ">" before a date, i.e. ">1/1/2013" to find a date greater than or after the entered date or number
<	Enter "<" before a date, i.e., "<1/1/2021" to find a date less than or before the entered date or number
*	Enter an asterisk at the end of the search term to only search for records that return results beginning with the search term. For example, enter "contract*".
?	Enter a question mark in place of a character when you are searching for more than one spelling of a term. For example, "peters?n" will return Peterson and Petersen.

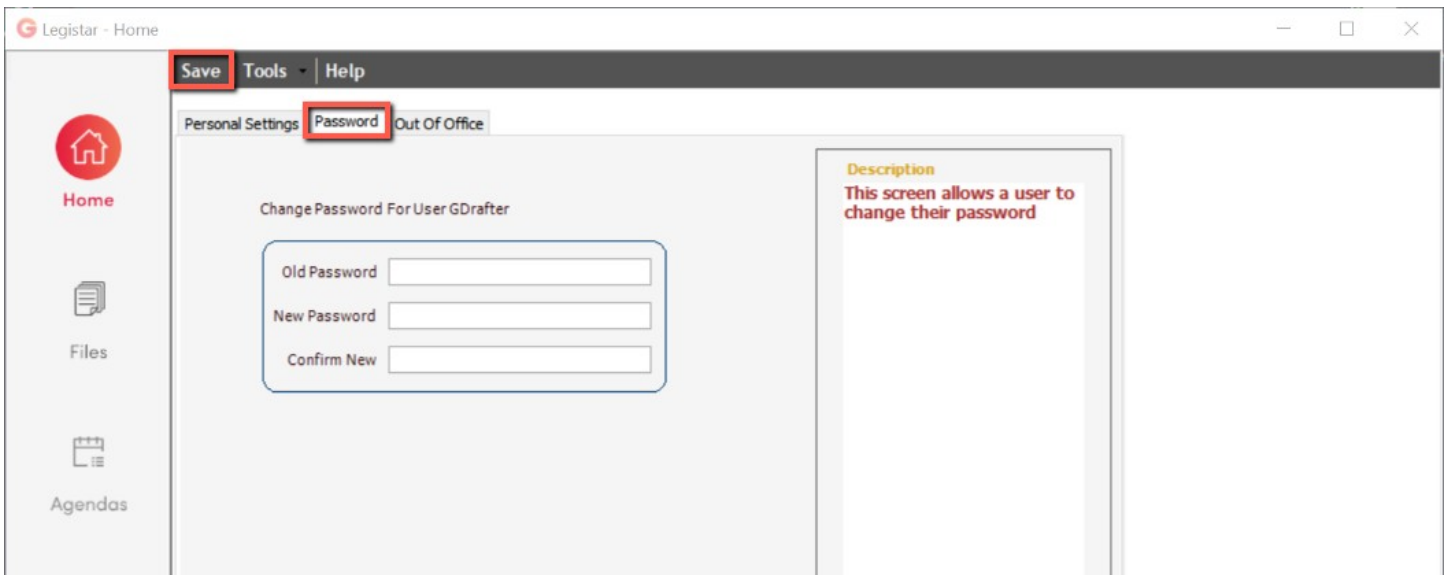
Changing your Password via Local Settings

Note: Princeton users can log in to Legistar using provided login/password combo

1. To access Local Settings, click the **Tools** menu on the **Home** screen and select **Local Settings**.



2. Change or reset your password on the **Password** tab. Enter your old (current) password, then your new password twice. There are not any character rules for setting your password, but please ensure it is secure. **To apply changes, you must click Save.**



To **exit** out of the Local Settings screen and return to the Home screen, click the **Home** button on the left.