

# Granicus Legistar “Drafter / Approver” Basic Instructions

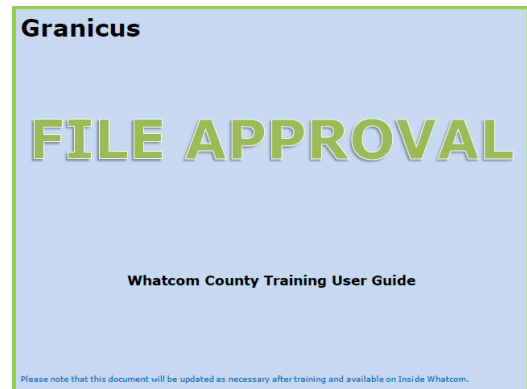
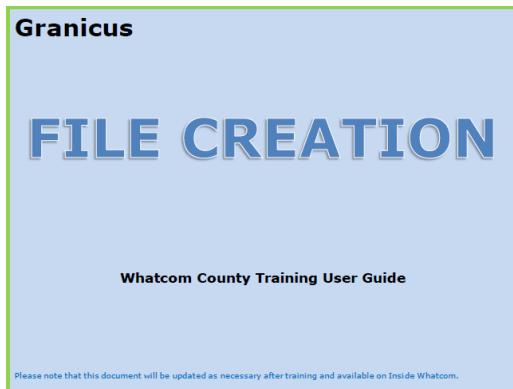
## Instructions to Create an Agenda Bill for a CONTRACT

1. **Start Legistar**
  - Click on the **Legistar5** desktop icon and login.
2. **Open Files Module**
  - Click on the **Files** module in the left pane.
3. **Start New Legislative File**
  - Click on the **New** button on the top gray bar.
4. **Enter Basic File Information**  
[Top Area]
  - **File Type:** Select **Contract**
  - **Assigned To:** Select **Council Finance and Administrative Services Committee**
  - **Agenda Date:** Select agenda date using the calendar icon
  - Click the **Save** button on the top gray bar
5. **Enter Title**  
[Title and Summary Tab]
  - Click on the **Title and Summary** tab
  - Click on the **Edit** button
  - MS Word will open
  - Click on the **Add-ins** Tab
  - Go to **Templates** drop down menu and select **Title and Summary**
  - Add primary contact email
  - Add a **TITLE FOR AGENDA ITEM:** “Request authorization for the County Executive to enter into a contract between Whatcom County and XXXXXX to provide XXXXXX in the amount of XXXXXX to a maximum of XXXXXX annually through XXXXXX” (Do not use a period) See FILE TITLE TEMPLATES language\*
  - Add a **SUMMARY STATEMENT:** *“Please refer to Staff memo for background and more information.”*
  - **Close** MS Word and **Save** the file. The file will upload to Legistar.
  - The Legistar **Title and Summary** area should be populated with your information.
6. **Review Details**  
[Details Tab]
  - Click on the **Details** tab. Information is auto populated. Do not enter anything.
7. **Attachments**
  - PDF Contract Information Sheet AND Contract.
  - PDF Staff memo.
  - Using lower left hand button, “attach” these two documents.
  - Name them using **NAMING CONVENTIONS FOR FILE ATTACHMENTS \*\***
8. **Enter Indexing Information**  
[Indexing and Related Files Tab]
  - Click on the **Indexing and Related Files** tab.
  - Click on the **Edit** link next to **Indexes**, select **Administration and Personnel** and **Other** as applicable, and **Close**
9. **Enter Internal Notes**  
[Internal Notes Tab]
  - Click on the **Internal Notes** tab.
  - Enter any special instructions for Clerk of the Council in “**Internal Notes**” box.
10. **Setup Approval Tracking**  
[Approval Tracking Tab]
  - Click on the **Approval Tracking** tab.
  - Click on the **New** button on the bottom bar
  - Click on the – **Add Sequence**- to select group for Contract approval.
  - Modify approval list per attached
  - List any FYI as the first in the sequence.

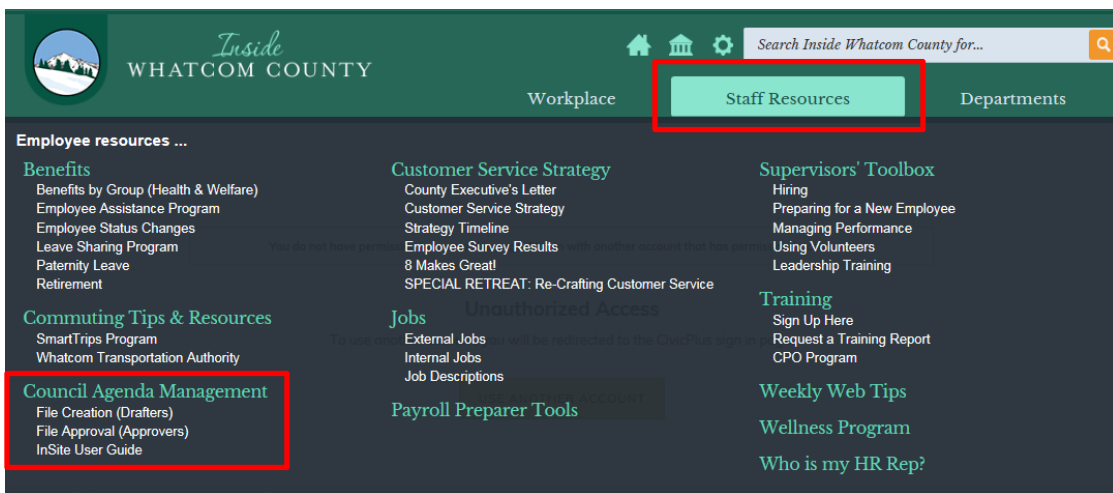
	<ul style="list-style-type: none"> <li>• Click on the <b>Email Template</b> drop down and select <b>Individual Review Request</b></li> <li>• Click on the <b>Start</b> button on the bottom bar to start the approval process</li> </ul>
<b>11. Approval Tracking Status</b> [Approval Tracking Tab]	<ul style="list-style-type: none"> <li>• Click on the <b>Approval Tracking</b> tab</li> <li>• Note that the status of the approval sequence is provided</li> <li>• Approvers will receive an e-mail notification. (Note: Approvers can use Legistar or Insite on the Web to review and approve.)</li> <li>• When approvers take action, the status is updated on the Approval Tracking tab</li> </ul>
<b>12. Approval Requests</b> [Home Module] [Approval Tracking Tab]	<ul style="list-style-type: none"> <li>• Approvers login to <b>Legistar</b></li> <li>• Click on the <b>Home</b> module in the left pane.</li> <li>• Click on a file that is ready for approval in the <b>Approval Requests</b> area</li> <li>• Review the file information at the top and within each tab</li> <li>• In the <b>Approval Tracking</b> tab, click the <b>Approver Action</b> button on the bottom bar</li> <li>• Click on the <b>Approve</b> button and the file will advance in the routing sequence</li> </ul>
<b>13. Run Title and Summary Report</b> [Home Module] [Approval Tracking Tab]	<ul style="list-style-type: none"> <li>• Click <b>Reports</b> on upper right</li> <li>• Select Title and Summary report from dropdown menu</li> <li>• Click on Run to create cover sheet</li> </ul>

### Additional Resources

Note: For additional information refer to the following guides provided by Whatcom County Council staff at the October 2018 onsite training sessions.



The latest version of these guides and other resources can be found on InsideWhatcom:



**\* FILE TITLE TEMPLATE LANGUAGE FOR CONTRACTS**

**CONTRACT AMENDMENT**

“Request authorization for the County Executive to enter into a contract amendment between Whatcom County and \_\_\_\_\_ to \_\_\_\_\_ in the amount of \$ \_\_\_\_\_ for a total amended contract amount of \$ \_\_\_\_\_”

**CONTRACT, AGREEMENT, INTERLOCAL**

Request authorization for the County Executive to enter into a contract between Whatcom County and \_\_\_\_\_ to \_\_\_\_\_, in the amount of \$ \_\_\_\_\_

Request authorization for the County Executive to enter into an interlocal agreement between Whatcom County and \_\_\_\_\_ for \_\_\_\_\_, in the amount of \$ \_\_\_\_\_

**\*\* NAMING CONVENTIONS FOR FILE ATTACHMENTS**

- **RULE OF THUMB:** Title attachments with plain language and so that the public can discern the order of attachments in the file
  - **Order them with the earliest document first if the file goes to more than one agenda date.**
  - You might use descriptive words like “Version 1” or the date of the agenda the document is for
  - Don’t leave extensions like “.pdf”
- Examples might be:
- Proposed Ordinance (include the ordinance and exhibits as one attachment)
  - Proposed Resolution (include the resolution and exhibits as one attachment)
  - Substitute Ordinance/Substitute Resolution for 11/20/2018 (include exhibits)
  - Ordinance/Resolution amended on 12/4/2019 (include exhibits)
  - Ordinance 2018-034 (for the final ordinance)
  - Resolution 2018-026 (for the final resolution)
  - Supporting Documents (Name what they are)
  - Map (with maybe a word or two description if needed)
  - Contract (ok to upload CIS and contract as one document, but keep memo separate)
  - Application(s)
  - Presentation
  - Staff Memo

Final contracts to Suzanne in Exec. with info. sheet for contract # assignment following Council adoption.