InSite User Guide

InSite User Guide

InSite is a website from which you can access and research legislative information. Your jurisdiction uses a software application called Legistar to help manage the legislative process. The information in Legistar is then published to InSite, which updates automatically. InSite is also referred to as the Legislative Portal. See our videos that provide an overview of InSite here.

Accessing and Navigating InSite	This section describes how to access and navigate InSite. It also explains when and how you would sign in to InSite.
The Legislation Tab	This section describes how to search legislation and work with your search results.
The Calendar Tab	This section describes the Calendar subtabs, how to search the calendar, and work with your search results.
The Primary Legislative Body Tab	This section describes how to search for information about your jurisdiction's primary legislative meeting body.
The Departments Tab	This section describes how to search departments and work with your search results.
The People Tab	This section describes how to search for information about anyone who has ever been listed on the Legislative Portal as a member of any legislative body.
The Recently Visited Tab	For users who sign in to InSite, this section describes legislation, departments, meetings, and people pages that the user has recently viewed.
The Information Tab	For users who sign in to InSite, this section describes how to update personal details.

The Security Tab	For users who sign in to InSite, this section describes how to change security information.
The Alerts Tab	For users who sign in to InSite, this section describes how to set legislation and meeting alerts.
The Approval Tracking Tab	For users who sign in to InSite, this section describes how to approve, disapprove, delegate or extend the due date of files in the approval tracking process.
Simple and Advanced Search in InSite	This section describes the differences between using simple and advanced search in InSite.

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Accessing and Navigating InSite

Accessing InSite

1. Enter <jurisdiction>.legistar.com into the address bar of your web browser, replacing <jurisdiction> with the name of your jurisdiction. For example, to access the Chicago Clerk's Legislative Portal, enter the URL chicago.legistar.com.

2. The row of tabs at the top of the Legislative Portal allows you to navigate through the different screens available in the Portal. The following figure shows the banner and tabs at the top of the screen:

> Your jurisdiction can customize the names of these tabs, as well as hide them, so what you see in your Portal may not match the images or what is described below. However, the functionality of the tabs remains the same regardless of how they are labeled. Additionally, the Home, Legislation, and Calendar tabs will almost always be present.

Signing into InSite

It isn't necessary to sign into InSite to view information on the tabs shown above. However, signing in enables public users to see their recently visited records and their own profile and security information.

Your jurisdiction has the option of turning on additional features such as legislation and meeting alerts, and ATS (approval tracking); if these are available, a user with the appropriate permissions will have access to them when they sign in. Additionally, users who are designated as administrators can change administration data such as the site header, system captions, etc.

Navigating InSite

Generally, the three leftmost tabs are your jurisdiction's homepage (see below), the Legislation tab, and the Calendar tab. These are followed by some combination of the following tabs:

- Primary Legislative Body tab (e.g., City Council tab)

- Departments tab

- People tab

The Home Tab

The leftmost tab is often either a welcome page or a link to the jurisdiction or primary legislative body's homepage.

Note: The jurisdiction's homepage is often located outside of InSite, so you may need to use your browser's back button or retype the link to return to the Legislative Portal.

>>Next: The Legislation Tab

The Legislation Tab

The Legislation tab allows you to search through all the details of past and current legislation produced by your jurisdiction.

Searching Legislation (Simple Search)

Note: You can also click Advanced Search. To learn about the differences between simple and advanced search, see Simple and Advanced Search in InSite.

1. (Optional) Enter your search criteria (keywords) in the **Search** textbox.

2. Select a date range from the **Date Range** drop-down menu.

3. Select the type of legislation from the **Type** drop-down menu.

4. Select the appropriate **checkboxes** to search file #, text, attachments, or other info.

Note: The **other info** checkbox searches secondary fields related to the legislation, such as status, sponsor, or legislation type.

5. Click **Search Legislation**. The search results are displayed. The number of records matching your search criteria is displayed at the top of the screen. For each record, the file number, type, status, and title is displayed, as well as the date the file was created and the date of the final action on the file (if applicable).

Note: To clear the search criteria and start over, click the **Legislation** tab.

6. Work with your search results as follows:

To	Do This
Set the number of records displayed on the screen	Click **Show**, and select the number of records you want to display on the screen (10, 100, 500, 1000, 1000, or all records).
Sort the records displayed on the screen	Click a column heading and select the arrows to sort the records. For the File Created and Final Action columns, an upward arrow indicates the list is displayed in order of the oldest date, and a downward indicates the list is displayed in order of the most recent date. For the File #, Type, Status, and Title columns, an upward arrow indicates the list is displayed in alphabetical order, and a downward arrow indicates the list is displayed in reverse alphabetical order.
Group the records displayed on the screen	Click **Group**, and select the appropriate option. You can group the records by type, status, the date the file was created or the date the final action was taken on the file.
Export the records to Excel, PDF, or Word	Click **Export**, and select the appropriate option.
View details of a specific record	Click the appropriate link in the File # column. A new screen displays details of the file, including file text, attachments and history (actions taken in meetings and results of those actions). If there is history available for the file, you can click links to view action details, meeting details and video. See the figure below.

| Home | Legislation | Calendar | City Council | Departments | People |

| Details | Reports |

File #:	**13-1119** Version: 1	Name:	
Type:	Report Action Item	Status:	Held in Committee
File created:	8/8/2013	In control:	Municipal Services Committee
On agenda:	10/8/2013	Final action:	

Title: R/B - Smith - Glendale Avenue from Ballard Road to Roemer Road be reconstructed with concrete pavement and curb and gutter to a width of 48' from back of curb to back of curb, which is 1' narrower than the existing street width. The newly reconstructed Glendale Avenue would include an 8' parking lane along the north side of the street, a 3' buffer area between the parking lane and bike lane, a 5' wide bike lane along the north side of the street, two 12.5' travel lanes, and a 6' wide bike lane along the south side of the street. Parking would be removed from the south side of Glendale Avenue within the proposed project limits. New Sidewalks would be constructed to the right-of-way line along both sides of Glendale Avenue within the project limits. Approved by a vote of Aye-2/Dannecker, Oswald; Nay-1/Martin. Amendment #1 at 9/4/13 Council: Strike "north" in all cases, replace with "south", and vice versa. This amendment will move the proposed parking lane from the north to the s...

Attachments: 1. Glendale Ave drawings.pdf

| History (10) | Text |

| 10 records | Group | Export |

Date ▾	Ver.	Action By	Action	Result	Action Details	Meeting Details	Video
9/10/2013	1		held		Action details	Meeting details	▶ Video
9/10/2013	1	Municipal Services Committee	held	Pass	Action details	Meeting details	▶ Video
9/4/2013	1		approved		Action details	Meeting details	▶ Video
9/4/2013	1	Common Council	amended	Pass	Action details	Meeting details	▶ Video
9/4/2013	1	Common Council	amended	Pass	Action details	Meeting details	▶ Video
9/4/2013	1	Common Council	amended	Fail	Action details	Meeting details	▶ Video
9/4/2013	1	Common Council	referred		Action details	Meeting details	▶ Video
9/4/2013	1	Common Council	denied	Fail	Action details	Meeting details	▶ Video
8/27/2013	1	Municipal Services Committee	recommended for approval	Pass	Action details	Meeting details	▶ Video
8/13/2013	1	Municipal Services Committee	held	Pass	Action details	Meeting details	▶ Video

Details of a Specific Record

>>Next: The Calendar Tab

![GRANICUS logo]

The Calendar Tab

The Calendar tab displays meetings in a specified date range for selected meeting bodies, using the criteria entered in the Search textbox.

The Calendar tab has two views: List View and Calendar View.

List View

List View displays the meetings in the specified date range in list form.

Calendar View

Calendar View displays the meetings in the specified date range in calendar form. If no criteria is entered in the Search textbox, it will return all meetings for the specified date range. You can view the calendar by day, week, month, or timeline (3-day periods, the default being the current date plus the next 2 days).

Home	Legislation	Calendar	City Council	Departments	People

List View	Calendar View

◀ ▶ today ▾   Oct, 2013   Day Week **Month** Timeline

Mon	Tue	Wed	Thu	Fri
30	01 Oct	2 Board of Health 7:00 AM [31] *Cancellation of meeting due to Lack of Quorum* Finance Committee 6:15 PM [31] *Special Meeting* Utilities Committee 6:30 PM [31] *Special Meeting* Common Council 7:00 PM [31]	3	4
7 City Plan Commission 4:00 PM [31] Community & Economic Development Committee 5:00 PM [31] Human Resources Committee 6:00 PM [31] *THIS MEETING HAS BEEN CANCELLED*	8 Utilities Committee 4:30 PM [31] Municipal Services Committee 5:30 PM [31]	9 Appleton Redevelopment Authority 10:00 AM [31] *THIS MEETING HAS BEEN CANCELLED* Fox Cities Transit Commission 3:00 PM [31] *THIS MEETING HAS BEEN CANCELLED* Finance Committee 4:30 PM [31] Parks and Recreation Committee 6:00 PM [31]	10 Safety and Licensing Committee 5:00 PM [31]	11

Searching the Calendar

1. (Optional) Enter search criteria (keywords) in the **Search** textbox.

2. Select a date range from the **Date Range** drop-down menu.

3. Select a department from the **Departments** drop-down menu.

4. Select the notes **checkbox** to include agenda and minutes (action) notes. The basic info checkbox is selected by default and includes the name, date, time, and location of the meetings, and comments associated with them.

5. Click **Search Calendar**. The search results are displayed. The number of meetings matching your search criteria is displayed at the top of the screen. For each meeting, the meeting name, date, time, and location is displayed, as well as links to the meeting details, agenda, minutes, and video if these are available.

6. Work with your search results as follows:

To	Do This
Sort the records displayed on the screen	Click **Group**, and select the appropriate option. You can sort the records by name, meeting date, and meeting location.

Note: You can also click a column heading and use the arrows to sort the meetings, e.g., click the Name column and sort the meetings alphabetically or in reverse alphabetical order.

Export the records to Excel, PDF, or Word	Click **Export**, and select the appropriate option.
View details of a department	Click the appropriate link in the **Name** column.
View meeting details	Click the appropriate link in the **Meeting Details** column, if it's available. A new screen displays details of the meeting. From this screen, you can click links to file details, action details and video. See the figure below.
Add a meeting from the InSite calendar to your Outlook calendar	Click the appropriate **Export Calendar** icon in the **Meeting Date** column. This icon displays next to the meeting date for every meeting in the List View and next to the meeting name and time in the Calendar view.
View the meeting agenda	Click the appropriate link in the **Agenda** column, if it's available.
View the meeting minutes	Click the appropriate link in the **Minutes** column, if it's available.
View the meeting video	Click the appropriate link in the **Video** column, if it's available.
View eComments associated with a meeting, if eComment is enabled	Click the appropriate link in the **eComment** column, if it's available. The eComment popup window displays any eComments submitted on the meeting's agenda items. To learn more about eComments, see eComment Overview.

| Home | Legislation | Calendar | City Council | Departments | People |

Share RSS Alerts

Details

Name:	Safety and Licensing Committee	Agenda status:	Final
Meeting date/time:	9/26/2013 5:00 PM	Minutes status:	Final-revised
Meeting location:	Council Chambers, 6th Floor		
Published agenda:	Agenda	Published minutes:	Minutes
Meeting video:	Video Edit		

Attachments:

Meeting Items (13)

13 records | Group | Export | Show: Legislation only

File #	Ver.	Agenda #	Name	Type	Title	Action	Result	Action Details	Video
13-1301	1			Report Action Item	Approval of minutes from previous meeting	approved	Pass	Action details	Video
13-1303	1			Report Action Item	Operator's License application of Rhonda S. Abitz, 119 E. Mitchell Avenue.	recommended for approval	Pass	Action details	Video
13-1304	1			Report Action Item	Operator's License application of Marsha L. Anthony, 532 N. Meade Street.	recommended for approval	Pass	Action details	Video
13-1353	1			Report Action Item	Operator's License application of Matthew J. Vanden Bloomer, 5535 W. Sandra Drive.	recommended for denial	Pass	Action details	Video

Meeting Details

>>Next: The Primary Legislative Body Tab

The Primary Legislative Body Tab

The Primary Legislative Body tab is a direct link to information about your jurisdiction's primary legislative meeting body. This tab is usually labeled with the name of the primary legislative body, e.g., City Council. The tab contains three subtabs: Details, Description, and Reports.

The Details Subtab

This subtab displays the meeting body's name, type, and meeting location, and contains the Calendar (List View and Calendar View), People, and Sponsored Legislation subtabs.

You can do the following on this screen:

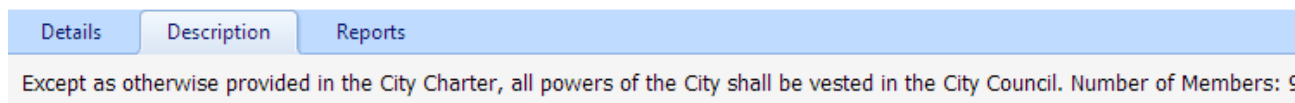| To	Do This
View meetings associated with the primary legislative body on the calendar	Click the **Calendar** subtab.
View members of the primary legislative body	Click the **People** subtab.
View sponsored legislation associated with the primary legislative body	Click the **Sponsored Legislation** subtab.

Sort the records displayed on the screen	Click **Group**, and select the appropriate option. You can sort the records by meeting date or by meeting location. **Note:** You can also click a column heading and use the arrows to sort the departments, e.g., click the **Date** column and sort the meetings by most recent or least recent date.
Export the records to Excel, PDF, or Word	Click **Export**, and select the appropriate option.
Set the date range	Click **Date**, and select the appropriate date range, e.g., This Month, Last Month, This Week, This Year, etc.
Apply date, time or location filters	Enter a date, time or location in the text boxes beneath the appropriate column headings, click the Filter icon, and select the appropriate option, e.g., Equal to, Greater than, Less than.
Add a meeting from the InSite calendar to your Outlook calendar	Click the appropriate **Export Calendar** icon in the **Meeting Date** column. This icon displays next to the meeting date for every meeting in the List View and next to the meeting name and time in the Calendar view.
View the meeting agenda	Click the appropriate link in the **Agenda** column, if it's available.
View the meeting minutes	Click the appropriate link in the **Minutes** column, if it's available.
View the meeting video	Click the appropriate link in the **Video** column, if it's available.
View details of another department	Select a different **Legislative Body** from the **Name** drop-down menu to view

information about that Body. Note that this takes you to the Departments tab.

The Description Subtab

This subtab contains a description of the selected legislative body.

The Reports Subtab

This subtab contains a list of uploaded reports associated with the selected legislative body. Click the appropriate link to view a report.

>>Next: The Departments Tab

The Details Subtab

The Details Subtab

This subtab displays the meeting body's name, type, and meeting location, and contains the Calendar (List View and Calendar View), People, and Sponsored Legislation subtabs.

You can do the following on this screen:

To	Do This
View meetings associated with the primary legislative body on the calendar	Click the **Calendar** subtab.
View members of the primary legislative body	Click the **People** subtab.
View sponsored legislation associated with the primary legislative body	Click the **Sponsored Legislation** subtab.
Sort the records displayed on the screen	Click **Group**, and select the appropriate option. You can sort the records by meeting date or by meeting location.

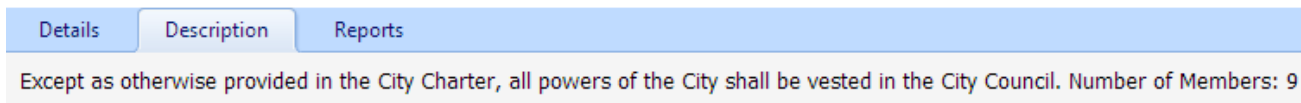|	
	Note: You can also click a column heading and use the arrows to sort the departments, e.g., click the **Date** column and sort the meetings by most recent or least recent date.
Export the records to Excel, PDF, or Word	Click **Export**, and select the appropriate option.
Set the date range	Click **Date**, and select the appropriate date range, e.g., This Month, Last Month, This Week, This Year, etc.
Apply date, time or location filters	Enter a date, time or location in the text boxes beneath the appropriate column headings, click the Filter icon, and select the appropriate option, e.g., Equal to, Greater than, Less than.
Add a meeting from the InSite calendar to your Outlook calendar	Click the appropriate **Export Calendar** icon in the **Meeting Date** column. This icon displays next to the meeting date for every meeting in the List View and next to the meeting name and time in the Calendar view.
View the meeting agenda	Click the appropriate link in the **Agenda** column, if it's available.
View the meeting minutes	Click the appropriate link in the **Minutes** column, if it's available.
View the meeting video	Click the appropriate link in the **Video** column, if it's available.
View details of another department	Select a different **Legislative Body** from the **Name** drop-down menu to view information about that Body. Note that this takes you to the Departments tab.

The Description Subtab

This subtab contains a description of the selected legislative body.

Details	Description	Reports

Except as otherwise provided in the City Charter, all powers of the City shall be vested in the City Council. Number of Members: 9

The Reports Subtab

This subtab contains a list of uploaded reports associated with the selected legislative body. Click the appropriate link to view a report.

Home	Legislation	Calendar	City Council	Departments	People

Details	Reports

Department Details

Department Details - Short

Departments and People

Departments and People - Vacancies

The Departments Tab

The Departments tab contains a list of all Legislative Bodies that have been entered into Legistar for your jurisdiction. You can also use this tab to track vacancies for publicly staffed boards or commissions.

| Home | Legislation | Calendar | City Council | Departments | People |

Share .•🐧 f ...

| Search | Reports |

Search: [   ] Type: -Select- ▼

[Search Departments] Help

| 22 records | Group | Export | View: Current |

Department Name ▲	Type	Meeting Location	Members	Vacancies
Appleton Redevelopment Authority	Committee, Board or Commission	Council Chambers, 6th Floor	1	
Board of Building Inspection	Committee, Board or Commission		1	
Board of Health	Committee, Board or Commission	Council Chambers, 6th Floor	5	
Board of Heating Examiners	Committee, Board or Commission			
Board of Public Works	Committee, Board or Commission	Council Chambers	11	

Note: This tab is often labeled **Committees** or **Boards and Commissions**.

Searching Departments

1. (Optional) Enter search criteria (keywords) in the **Search** textbox.

2. Select the type of legislative body from the **Type** drop-down menu. The list of types available is determined by the body types set up for your jurisdiction in Legistar Administration.

3. Click **Search Departments**.

4. Work with your search results as follows:

To	Do This
Sort the records displayed on the screen	Click **Group**, and select the appropriate option. You can sort the records by type, and by meeting location. **Note:** You can also click a column heading and use the arrows to sort the departments, e.g., click the **Department Name** column and sort

	the departments alphabetically or in reverse alphabetical order.
Export the records to Excel, PDF, or Word	Click **Export**, and select the appropriate option.
View active, inactive or all departments	Active (current) departments are displayed by default. Click **View** and select **Past** to display only inactive departments, or select **All** to display active and inactive departments.
View details of a department	Click the appropriate link in the **Department Name** column. The department details are similar to the details displayed on the Primary Legislative Body tab.
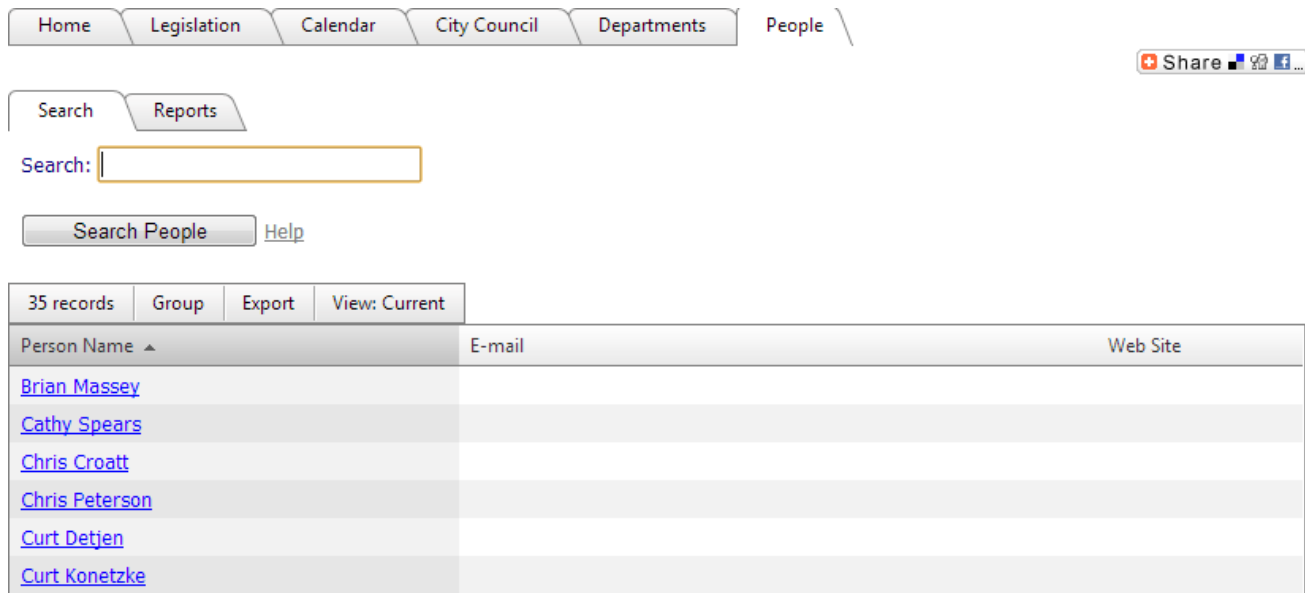
The People Tab

The People tab contains information about anyone who has ever been listed on the Legislative Portal as a member of any legislative body. The tab contains two subtabs: Search and Reports.

The Search Subtab

This subtab is displayed by default when you access the People tab.

To search People:

1. (Optional) Enter search criteria in the **Search** textbox.

2. Click **Search People**.

3. Work with your search results as follows:

To	Do This
Sort the records displayed on the screen	Click **Group**, and select the appropriate option. You can sort the records by email or by website. **Note:** You can also click a column heading and use the arrows to sort the

	departments, e.g., click the Person Name column and sort the list of names alphabetically or in reverse alphabetical order.
Export the records to Excel, PDF, or Word	Click **Export**, and select the appropriate option.
View active, inactive or all people records	Active (current) person records are displayed by default. Click **View** and select **Past** to display only inactive person records, or select **All** to display active and inactive person records.
View details of a person	Click the appropriate link in the **Person Name** column. The details displayed include the person's first and last name, email, website, and additional notes entered about them, as well as a list of the departments of which they are a member, and their position, start and end date in those departments. If the person is associated with sponsored legislation, these details are displayed when you click the **Sponsored Legislation** subtab.

The Reports Subtab

The Reports subtab allows you to view membership in departments and department vacancies reports that your meeting body has uploaded to the Legislative Portal. Click the appropriate link to view a report.

Home	Legislation	Calendar	City Council	Departments	People

Search	Reports

Departments and People

Departments and People - Vacancies

>>Next: The Recently Visited Tab

>>Next: The Recently Visited Tab

The Recently Visited Tab

The Recently Visited tab is visible for users who sign in to InSite. It displays legislation, departments, meetings, and people pages that the user has recently viewed. Links are available if you need to view these pages again.

>>Next: The Information Tab

The Information Tab

The Information tab is visible for users who sign in to InSite. It displays the user's personal details such as username, email, first and last name, district, organization, and address. Users can add or edit information in any field aside from the User name field, and click **Save** to update these details.

Home	Legislation	Calendar	City Council	Departments	People

Recently Visited	Information	Security	Alerts	Approval Tracking

Information

User name:	KenSlattery
E-mail:	kens@granicus.com
First name:	Ken
Last name:	Slattery
District:	9
Organization:	Granicus
Address 1:	600 Harrison St
Address 2:	
City:	San Francisco
State/region:	CA
Zip/postal code:	94107
Country:	USA

Save

>>Next: The Security Tab

The Security Tab

The Security tab is visible for users who sign in to InSite. The tab enables users to change their password, and set their secret question. Users must click **Save** to save their updates.
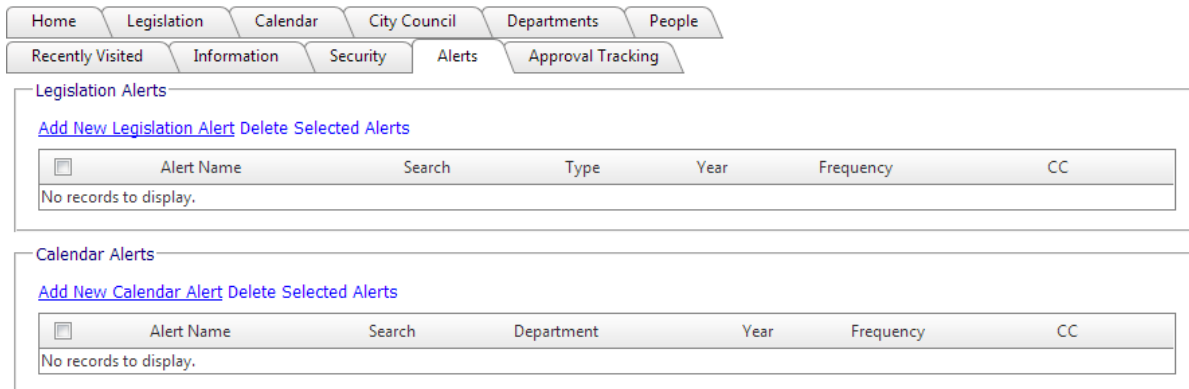
>>Next: The Alerts Tab

The Alerts Tab

The Alerts tab is visible to users who sign in to InSite, and enables them to set legislation and meeting alerts. Alerts are e-mail updates of the latest relevant search results based on your search terms. If your initial search doesn't produce immediate results, you can create an alert for the search terms in order to receive e-mails if your search terms are added to the Legislation or Calendar pages.

Set a Legislation Alert

1. Make sure you're signed into InSite.

2. Click the **Alerts** tab. (If you don't see this tab, click **My Account** in the top right corner of your screen).

Note: You can also set an alert after you run a search from the Legislation tab by clicking the Alerts button on the right-hand side of the Legislation page. When you do this, make sure the Search Terms, Time Period, and Type values are correct. To change them, return to the Legislation page and generate a new search. Otherwise, the steps for creating the alert are similar to the steps described here.

3. (Optional) Edit the Alert Name; this will appear as the subject of the email you receive.

4. Enter your keywords in the **Search terms** field.

5. Select how often you would like to receive an alert (Once, Daily, Weekly, Monthly).

6. Confirm the email address in the **Deliver to** field is correct; this should be the email address associated with your login.

7. (Optional) Enter a secondary email address in the **CC** field.

8. Click **Add Alert**.

Alerts are e-mail updates of the latest relevant search results based on your choice of query.

Create a Legislation Alert

Your Alert is built on the terms entered and selected in the search section of the Legislation page. Even if your search does not produce immediate results, you can create an alert for the search terms. Any alerts you create will send you emails if your search terms are added to the Legislation page.

1 Click the Alerts button, after you run a search from the Legislation interface. The Alerts button is located on the right-hand side of the Legislation page.

2 Edit the Alert Name; this will appear as the subject of the email you receive. (Optional)

3 Confirm the Search Terms, Time Period, and Type are correct. To change them, return to the Legislation page and generate a new search.

4 Select an occurrence of how often you would like to receive an alert.

5 Confirm the email address is correct; this should be the email address associated with your InSite login.

6 Enter a secondary email address in the CC field. (Optional)

7 Click the Add Alert button.

Alert	
Alert name:	City of Appleton - Legislation
Search terms:	Agriculture
How often:	○ Once ○ Daily ● Weekly ○ Monthly
Deliver to:	kens@granicus.com
CC:	
	Add Alert

Set a Calendar Alert

1. Make sure you're signed in to InSite.

2. Click the **Alerts** tab. (If you don't see this tab, click **My Account** in the top right corner of your screen).

Note: You can also set an alert after you run a search from the Calendar tab by clicking the Alerts button on the right-hand side of the Calendar page. When you do this, make sure the Search Terms, Time Period, and Department values are correct. To change them, return to the Calendar page and generate a new search. Otherwise, the steps for creating the alert are similar to the steps described here.

3. (Optional) Edit the Alert Name; this will appear as the subject of the email you receive.

4. Enter your keywords in the **Search terms** field.

5. Select how often you would like to receive an alert (Once, Daily, Weekly, Monthly).

6. Confirm the email address in the **Deliver to** field is correct; this should be the email address associated with your login.

7. (Optional) Enter a secondary email address in the **CC** field.

8. Click **Add Alert**.

Alerts are e-mail updates of the latest relevant search results based on your choice of query.

Create a Calendar Alert

Your Alert is built on the terms entered and selected in the search section of the Calendar page. Even if your search does not produce immediate results, you can create an alert for the search terms. Any alerts you create will send you emails if your search terms are added to the content on the Calendar page.

1 Click the Alerts button, after you run a search from the Calendar page. The Alerts button is located on the right-hand side of the Calendar page.

2 Edit the Alert Name; this will appear as the subject of the email you receive. (Optional)

3 Confirm the Search Terms, Time Period, and Department parameters are correct. To change them, return to the Calendar interface and generate a new search.

4 Select an occurrence of how often you would like to receive an alert.

5 Confirm the email address is correct; this should be the email address associated with your InSite login.

6 Enter a secondary email address in the CC field. (Optional)

7 Click the Add Alert button.

Delete an Alert

- On the Alerts tab, select the checkbox or checkboxes associated with the alert or alerts you want to delete, and click **Delete Selected Alerts**.

>>Next: The InSite Approval Tracking Tab

The InSite Approval Tracking Tab

The Approval Tracking tab on InSite enables users who are signed in to approve, disapprove, delegate, or extend the due date of a file.

Complete the following steps:

1. Click **Sign In** in the top right corner.

2. Click the **Approval Tracking** tab. If you don't see that tab, click the **My Accounts** link in the top right corner to pull it up. You may also need to ask your Legistar system administrator to enable the tab.

3. Click the **File ID** of the item you would like to approve.

4. Review the information on the screen.

    a. Make changes to the text if needed.

    b. Click **View** to review attachments.

    c. Click **Edit** to modify attachment names.

    d. If you make any changes to an existing attachment or need to upload a new attachment do so using the New Attachment button.

5. Change the text and upload new attachments if needed.

6. Enter any Notes if needed.

7. Select your approval action:

Approval Action	Description
Approve	Sends the file to the next person in the approval process.
Disapprove	Sends emails to the drafter and anyone who already approved the item, informing them that you did not approve the file. Be sure to add a note explaining why you did not approve the file.

Delegate	Sends the item to another eligible approver. You'll need to fill in the Delegate field to the right of the Action field.
Extend Due Date	Gives you more time to consider the file by extending the due date.

8. Click **Submit**.

Simple and Advanced Search in InSite

Simple Search

You can use Simple Search to search the Legislation, Calendar, Departments, and People tabs.

Search Type	Description
Single Word Search	Entering a single word in the textbox returns results containing that word. For example, searching for *safety* returns any item containing the word *safety*.
Multiple Word Search	Entering multiple words in the textbox returns results containing all of the entered words. For example, searching for *public safety* returns any item containing both the words *public* and *safety*.
Multiple Word Search (With Quotes)	Entering multiple words enclosed in quotes in the textbox returns results containing the entered words in the exact order they are entered. For example, searching for *public safety* returns any item containing the phrase *public safety*, but not items with the phrase *safety of the public*.
Wildcard Search	Entering a series of letters followed by an asterisk(*) as a placeholder returns any words that begin with those letters. For example, searching for *safe** returns items containing *safe*, *safety*, and *safest*, but not *vouchsafe* (because the wildcard is placed after the word safe, not before it).
OR Search	Entering two words separated by OR in the textbox returns any items containing either of the words, or both. For example, searching for *public OR safety* returns items containing *public*, *safety*, and *public safety*.
AND NOT Search	Entering two words separated by AND NOT in the textbox returns items containing the first word, as long as the second

is not present. For example, searching for *public AND NOT safety* returns items containing *public housing*, but not items containing *public safety*.

Advanced Search

Click the **Advanced Search** link on the Legislation tab to use advanced searching capabilities. Advanced Search provides many ways to increase the accuracy of search results by adding to the Simple Search functionality.

Note: Search results in Advanced Search are based on the result of all fields combined, so each additional field will narrow the search results further. All search results have to match all criteria.

The following table describes the search fields available in Advanced Search:

Field	Description
Number of results	Limits the number of results returned by the search to the number selected in the drop-down menu.
Date	Limits the date range of the search results to the period selected in the drop-down menu.
Legislative Files Information	This is a heading.
Legislative text	Searches the text of Legislative Files (minutes, agenda, etc.) for the critera entered in the textbox. It does not search attachments.
Title	Searches the titles of Legislative Files for the criteria entered in the textbox.
File/Enactment/Document #	Limits the search results to those with the specified File, Enactment, or Document number.
Type	Limits the search results to files of the legislative file type selected in the drop-down menu.

Status	Limits the search results to those with the status selected in the drop-down menu.
File Created (Intro Date)	These fields limit the search results to legislation created on (=), before (<), after (>), or between the entered dates.

For example:

- Selecting the *on (=)* radio button and *12/1/2013* on the calendar returns any legislation introduced on December 1, 2013.
- Selecting the before *(<)* radio button and *12/1/2013* on the calendar returns any legislation introduced before December 1, 2013.
- Selecting the *after (>)* radio button and *12/1/2013* on the calendar returns any legislation introduced after December 1, 2013.
- Selecting the *between* radio button, *11/1/2013* on the first calendar, and *12/1/2013* on the second calendar returns any legislation introduced between November 1, 2013 and December 1, 2013.

In Control	Limits the search results to those currently controlled by the specified Legislative Body.
On Agenda	Limit the search results to legislation from an Agenda on (=), before (<), after (>), or between the entered dates.

For example:

- Selecting the *on (=)* radio button and *12/1/2013* on the calendar returns any legislation from any Agenda dated December 1, 2013.
- Selecting the before *(<)* radio button and *12/1/2013* on the calendar returns any legislation from any Agenda dated before December 1, 2013.
- Selecting the *after (>)* radio button and *12/1/2013* on the calendar returns any legislation from any Agenda dated after December 1, 2013.
- Selecting the *between* radio button, *11/1/2013* on the first calendar, and *12/1/2013* on the second calendar returns any legislation from any Agenda dated between November 1, 2013 and December 1, 2013.

Final Action (Passed Date)	Limit the search results to legislation with a final action on (=), before (<), after (>), or between the entered dates.

For example:

- Selecting the *on (=)* radio button and *12/1/2013* on the calendar returns any legislation passed on December 1, 2013.
- Selecting the *before (<)* radio button and *12/1/2013* on the calendar returns any legislation passed before December 1, 2013.
- Selecting the *after (>)* radio button and *12/1/2013* on the calendar returns any legislation passed after December 1, 2013.
- Selecting the *between* radio button, *11/1/2013* on the first calendar, and *12/1/2013* on the second calendar returns any legislation passed between November 1, 2013 and December 1, 2013.

Related Information   This is a heading.

Sponsor   Limits the search results to legislation sponsored by the person or Body specified in the drop-down menu.

Index   Limits the search results to legislation with the Matter Index specified in the drop-down menu. You can can use this field to narrow your search to categories defined by your meeting body.

Code Section   Limits the search results to legislation affecting the Code Section specified in the drop-down menu.

Attachment   Searches Titles and Content of attachments for the criteria entered in the textbox.

History   This is a heading.

Action Date   Limit the search results to legislation with a final action on (=), before (<), after (>), or between the entered dates.

For example:

- Selecting the *on (=)* radio button and *12/1/2013* on the calendar returns any legislation passed on December 1, 2013.
- Selecting the *before (<)* radio button and *12/1/2013* on the calendar returns any legislation passed before December 1, 2013.
- Selecting the *after (>)* radio button and *12/1/2013* on the calendar returns any legislation passed after December 1, 2013.
- Selecting the *between* radio button, *11/1/2013* on the first calendar, and *12/1/2013* on the second calendar returns any legislation passed between November 1, 2013 and December 1, 2013.

Action by	Limits the search results to the legislative body specified in the drop-down menu.
Action	Limits the search results to the action specified in the drop-down menu.
Sent to	Limits the search results to the legislative body specified in the drop-down menu.
Agenda note	Searches agenda notes for the criteria entered in the textbox.
Minutes note	Searches minutes notes for the criteria entered in the textbox.

The System Admin Tab

The **System Admin** tab enables administrators to work with InSite System Captions, the Site Header, Statistics and Users.

InSite System Captions

This screen enables you to rename field labels on InSite. It lists every label that appears on your InSite pages. The original caption and new caption is displayed. When you want to change a label on a page, you search for the original label, and then click **Edit** and enter the new one.

Site Header

Use this screen to customize your site header. For example, you can insert a site banner here.

System Admin - Site Header

Statistics

This screen enables you to view statistics for legislation and calendar search terms, and unique visitors to your site by day, month, or year. You can set a time period for your results: this week, month, or year, last week, month, or year, and the current day. You can export the results to PDF, Excel, or Word.

Search Term	Count
change order	8
item	5
meeting	2
agenda	2
13-119	2
fire safety	2
special use permit	1
report	1
minutes	1
13-1119	1
Sum : 25	

Users

This screen enables you to edit InSite users' first name, last name, and email address. You can also make them a system administrator, OLS administrator, or OLS user. Click **Edit** for the user whose details you want to change, make the changes, and then click Update. You can also delete users from this screen; see the Delete icon on the right of the screen.

Use the **Filter** options under the column headings to filter your list of users as necessary.