

Legistar Basic and Advanced Agenda Item Drafter and Board Liaison Training

Nov 13, 2025 – 10:00am to noon

10:00am-10:30am - Legistar Basic Agenda Item Drafter Training:

1. Opening and logging into Legistar
2. The home screen quadrants
3. Create a new agenda item
4. Staff report tab
5. Attachments tab
6. Details tab
7. Approval tracking tab
8. Required reviews
9. Building and starting approval sequences
10. Creating a preview PDF (mini packet)
11. Q & A and share your favorite hints

10:45am-11:15am - Legistar Advanced Agenda Item Drafter Training:

1. Searching for items in the files area with date ranges and details tab fields
2. Switching between search results and item view
3. Displaying different search columns and exporting searches
4. Pre-made reports
5. Pausing, changing, saving, delegating and restarting approval sequences
6. Deleting an item
7. Setting out-of-office
8. Demo of agenda creation from the CCO's viewpoint
9. Legistar configuration behind the scenes (agenda templates/boilerplate)
10. Q & A and share your favorite hints

11:30am-11:50am - Legistar Boards, Commissions, Committees and Task Force Training

1. Opening and logging into Legistar
2. The home screen layout
3. Create a new agenda
4. Making the BCTF meeting schedule in Legistar
5. Updating Insight password
6. Uploading agendas into Insight
7. Uploading meeting minutes into Insight
8. Entering link to meeting recordings into Insight
9. Entering Granicus Media ID # into the Minutes area of Legistar (future feature)
10. Q & A and share your favorite hints