What's New in Peak Agenda Management

This page contains a list of past updates and bug fixes released for Peak Agenda Management, going back to October 2015. If a month is not listed, it means that there was no Peak release that month.

Peak is a hosted application. Unless you've made other arrangements with us, no action is required on your end to receive these updates.

What's New in Peak Agenda Management, December 2, 2016

New Feature

Peak Meeting Details Description Field Available on Agenda Reports

The **Description** field for a meeting is now available for display on agenda reports. Contact Granicus Customer Care if you would like the field added to your agenda report template(s).

Bug Fixes

Updates to agenda item (additional attachment, title change) not reflected on agenda report

If the Admin or Agenda Coordinator has turned on custom numbering (or turned it on and subsequently turned it off), modifications to individual agenda items on the agenda are now properly reflected on the agenda and its subsequently generated reports and packets.

Changing the cover page include/exclude flag on an item does not immediately update data

If the cover page include/exclude flag is changed on an agenda item, an agenda packet that is created for the agenda containing that item immediately reflects the new setting of the cover page for that item.

Removing an agenda item from a section clears the selected meeting body from the item

When you remove an agenda item from an agenda section using the **x** icon on the agenda item card, the meeting body is now maintained on the details of that agenda item. This enables the item’s drafter to find the item—by searching via meeting body—in order to place it on a different agenda.

Removing an agenda section containing items does not clear the meeting date from the items

If a section that had items assigned to it is removed from an agenda, these items now become unscheduled for the meeting body and are available to be added to another agenda.

What's New in Peak Agenda Management, November 4, 2016

New Features

Meeting Status color is now reflected on meeting cards

We've enhanced the meeting cards on the left side of the Meetings page. The cards now use distinct colors for the status of the agenda to reflect the same color pattern on the **Admin** > **Meeting Types** > **Manage Meeting Statuses** page. For agendas that are marked as "Final," the agenda's status will display highlighted in green. For agendas that are not marked as "Final," the status will display in gray. Any platform-created meetings that do not have a meeting status set for them (or for those jurisdictions that chose not to populate a meeting status of "Draft"), meeting cards will show a meeting status of "Not Selected" highlighted in blue.

Agenda view status color now matches calendar card status color

When an Admin or Agenda Coordinator puts an agenda in a Final status, the status will display in green on the agenda. This is consistent with color coding on the **Admin** > **Meeting Types** > **Manage Meeting Statuses** page and on the Meetings page view.

What's New in Peak Agenda Management, October 7, 2016

New Features

Meeting Status color is now reflected on meeting cards

We've enhanced the meeting cards on the left side of the Meetings page. The cards now use distinct colors for the status of the agenda to reflect the same color pattern on the **Admin** > **Meeting Types** > **Manage Meeting Statuses**page. For agendas that are marked as "Final," the agenda's status will display highlighted in green. For agendas that are not marked as "Final," the status will display in gray. Any platform-created meetings that do not have a meeting status set for them (or for those jurisdictions that chose not to populate a meeting status of "Draft"), meeting cards will show a meeting status of "Not Selected" highlighted in blue.

Agenda view status color now matches calendar card status color

When an Admin or Agenda Coordinator puts an agenda in a Final status, the status will display in green on the agenda. This is consistent with color coding on the **Admin** > **Meeting Types** > **Manage Meeting Statuses** page and on the Meetings page view.

Bug Fixes

Attempting to create a duplicate meeting body should result in an alert

If a Peak Admin creates or edits a meeting body and attempts to use a name already in use, the system will now display an alert.

Reordering items in a section on an agenda does not render the new numbering

When you reorder items within an agenda section using the drag-and-drop function, the items are now correctly reordered and renumbered within a section as soon as you drop the item to the new position. No screen refresh is needed to show the new order/numbering.

Delay when removing agenda items from an agenda

When you remove an agenda item from a section on the agenda view, there is no longer a 10-second delay before the agenda item card disappears. The card now almost immediately disappears from the agenda once you confirm that you want to remove the item.

Duplicating an agenda item with workflow attached renders source data/item locked

When a user duplicates an agenda item that has an associated workflow (whether the source item is in draft, in review, or approved), the new item is correctly displayed with its data and is unlocked for the user to continue processing the item.

Problems clearing Start Time when editing a recurring meeting as a series

When creating or editing a meeting as a series, if you need to change the start and/or end time of the meeting, you can reselect a time from the drop-down menu or type in a new time.

Filter Meetings menu on the Meetings page size adjusted

We've made the **Filter Meetings** drop-down menu on the Meetings page wider to accommodate display of longer Meeting Body names.

Backspacing issue for users in Internet Explorer

- **SalesForce Case #310280**

We have improved the experience for Internet Explorer users working with the **Item Title** and **Suggested Action**fields in agenda item details. Typing, backspacing, cut-and-pasting, and subsequent editing is now responsive as you work in the fields. The issue in which the cursor jumps to the end of these fields while editing should occur less frequently, and moving to other fields does not cause you to lose text that has been pasted into the **Item Title** and **Suggested Action** fields.

Agenda sections sorting issue

We have addressed an issue with administering meeting types (adding, deleting, and resorting sections) in Admin. The system was leaving holes in section positioning such that when meetings were created using this meeting type, users would have trouble reordering sections on those agendas. Admins can now create and edit a meeting type, add/delete/sort sections, and upon clicking **Save**, those meeting types will generate correctly ordered and sortable sectioned agendas.

User records not correctly displaying associations to People records

Under **Admin** > **People** > **Manage People** > **Users** tab, you can view which person record, if any, is associated with a user by clicking the **pencil** icon used to change the user's role. This association was not properly displaying, and the Change Role form instead claimed the user was not associated with a person. We've fixed this issue, and if a user has an associated person and the email addresses on the People and User records match, the Title and the Department of the associated person correctly display on the form.

Typing in the Start Time field when creating a recurring meeting resets the start date

This fix enables you to type in the **Start Time** field when creating or editing a meeting as a series without corrupting data on the form. The current meeting being examined no longer resets its meeting date to today's date. The meeting card on the right-hand side of the Edit Meeting page also retains its date.

Broken sorting on agendas

- **SalesForce Case #310505**

We've fixed sorting of agenda sections. Sections now maintain their new order, and the agenda is renumbered correctly.

Updated start time does not display on review of meeting as a series

Editing the start time of a meeting as a series now updates the start time from this meeting forward when viewing the meeting as a single instance or as a series.

Type-ahead select not working when there are multiple matches in a drop-down menu

Peak now fully supports type-ahead select for all of its drop-down menus and fields that contain a number of values (e.g., Agenda Sections on item details view).

Performance improvement: loading agendas from Meetings or Item Details pages

We've reduced the time it takes for Peak to load agendas.

Newest to Oldest/Oldest to Newest filter does not affect first card in Add Item modal

If you add an existing unscheduled agenda item in the system via the **Add Item** button on the left toolbar on the agenda view, all unscheduled items are now correctly sorted based on the filter selected.

No error message displays for blocked deletion of a meeting body when it's associated with a meeting

An error message now displays if a Peak Admin attempts to delete a meeting body that is associated to at least one meeting in the system.

What's New in Peak Agenda Management, October 7, 2016

New Features

New Submission Deadline field on the Create/Edit meeting page

This feature enables a Peak Admin or Agenda Coordinator to set an item submission deadline on the Create/Edit Meeting page. This allows a user with the Drafter role to assign items to this meeting up until its deadline. After the deadline is passed, that meeting date is no longer included in the drop-down menu on the Item Details page. In this case, the item either needs to be left unscheduled or needs to be placed on another meeting that has no submission deadline or whose deadline has not passed.

The **Item Submission Deadline** and **Cutoff Time** fields on the Create/Edit Meeting page are not required fields and will default to blank. If the Admin or Agenda Coordinator doesn't pick a deadline for the meeting, it will be available for a Drafter to add an item to it with no restrictions. The meeting can be part of a series, but these deadline fields are available only on the individual occurrence. Each meeting of the series can have its own submission deadline.

When the **Item Submission Deadline** is selected by typing a date or using the calendar control, the **Cutoff Time** is set to the nearest hour by default. The user can adjust the time as necessary.

The submission deadline does not apply to an Agenda Coordinator or Peak Admin. Users with these roles can see/select all respective meeting dates for any agenda item given a meeting body.

Pagination added to Items page

To improve the loading performance of agenda items on the Items page, we've added pagination on the form, listing up to 50 items at a time based on the current filter. A total count of items, the current page number, and the total number of pages displays based on the current filter. To access up to the next 50 items, click **Next**. To access a previous set of 50 items, select **Prev**. You may also use the back arrow (**<<**) and forward arrow (**>>**) buttons to jump to the first and last page of items.

Note: With this change, the Items page will now load on iOS when there are 150+ items. This has been verified on both iOS Chrome and Safari. We recommended you use iPad Air or higher for Peak.

Bug Fixes

Long meeting body name overruns the drop-down arrow on the Agenda Item Details form

To prevent longer meeting body names from overrunning the **Meeting Body** drop-down menu on the Agenda Item Details form, we've restyled this page. The **Meeting Body** and **Meeting Date** fields now sit on their own line. The **Agenda Sections** field now occupies one line and displays long section names in a more user-friendly manner.

Agendas will not generate if the Peak site has no logo uploaded

As before, a logo can be uploaded to the **Admin > Peak Configuration > Site Information** page. This logo (.png, .jpg, .jpeg only)—if supported by the template used for the agenda report and the template used for item cover pages—will appear on those reports. Uploading a logo to this page is not required, and this fix allows item cover pages and agenda reports to continue to generate for jurisdictions that do not make use of the logo on the Site Information page.

Infinite spinner now correctly loads a Not Found page

On various pages across Peak, if you attempt to use the **Back** button on your browser to access an element (agenda item, agenda, meeting type, etc.) that has been deleted, you'll either be redirected to a generic Page Not Found or receive a message that the element cannot be found.

User's display name retained after user account deleted

If a user who had made comment(s) on an agenda item is deleted from the platform, the comment history will maintain that user's name (and picture if one has been uploaded).

Note: If the user is re-created (e.g., the user was deleted in error), even if given the same username, Peak considers this user different from the one that was deleted, and the re-created user will not be able to edit comments made previously.

Comments email with bad link

- **SalesForce Case #308862**

When an email notification is received containing a comment generated on an agenda item, the item hyperlink in the email now takes the user to the particular item.

Meeting Date field does not save when user creates a meeting

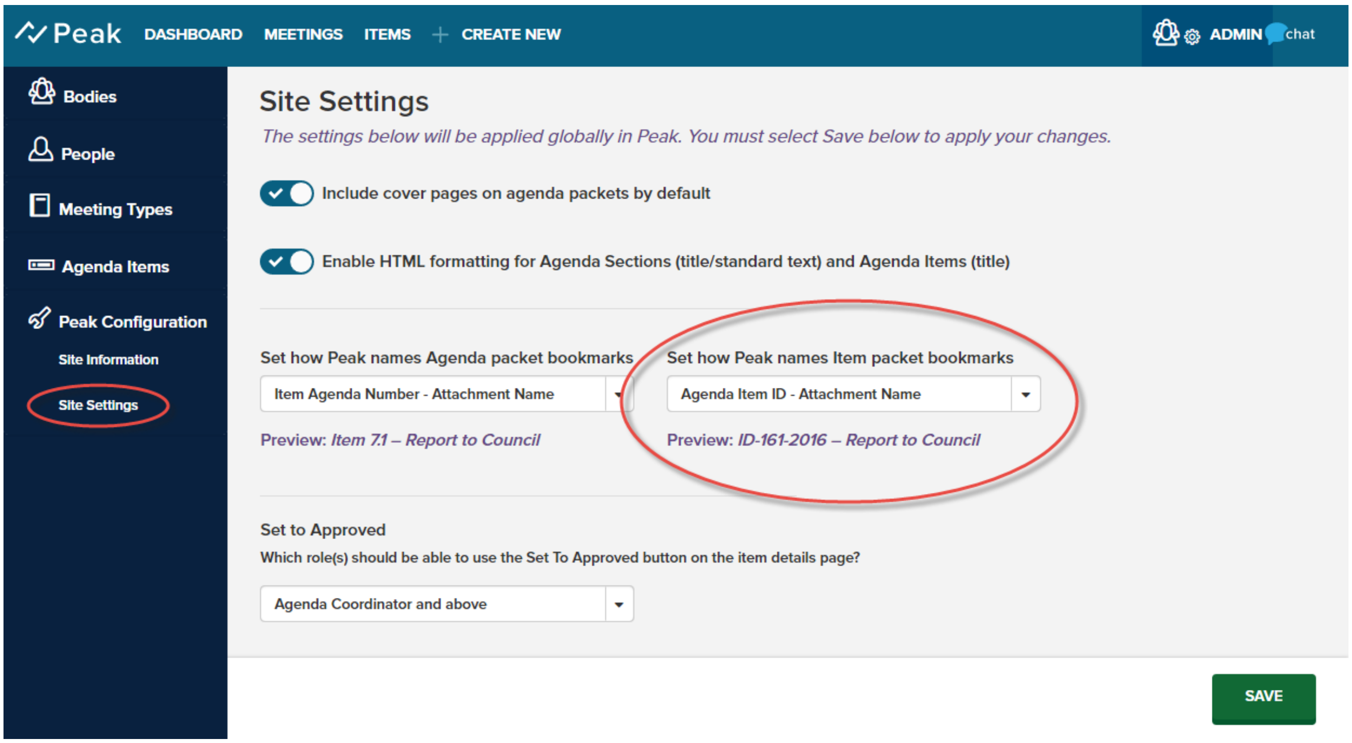
- **SalesForce Case #309285**

When you create or edit a single-occurrence meeting and type in the **Start Time** field, the date of the meeting no longer resets to the current date.

What's New in Peak Agenda Management, September 9, 2016

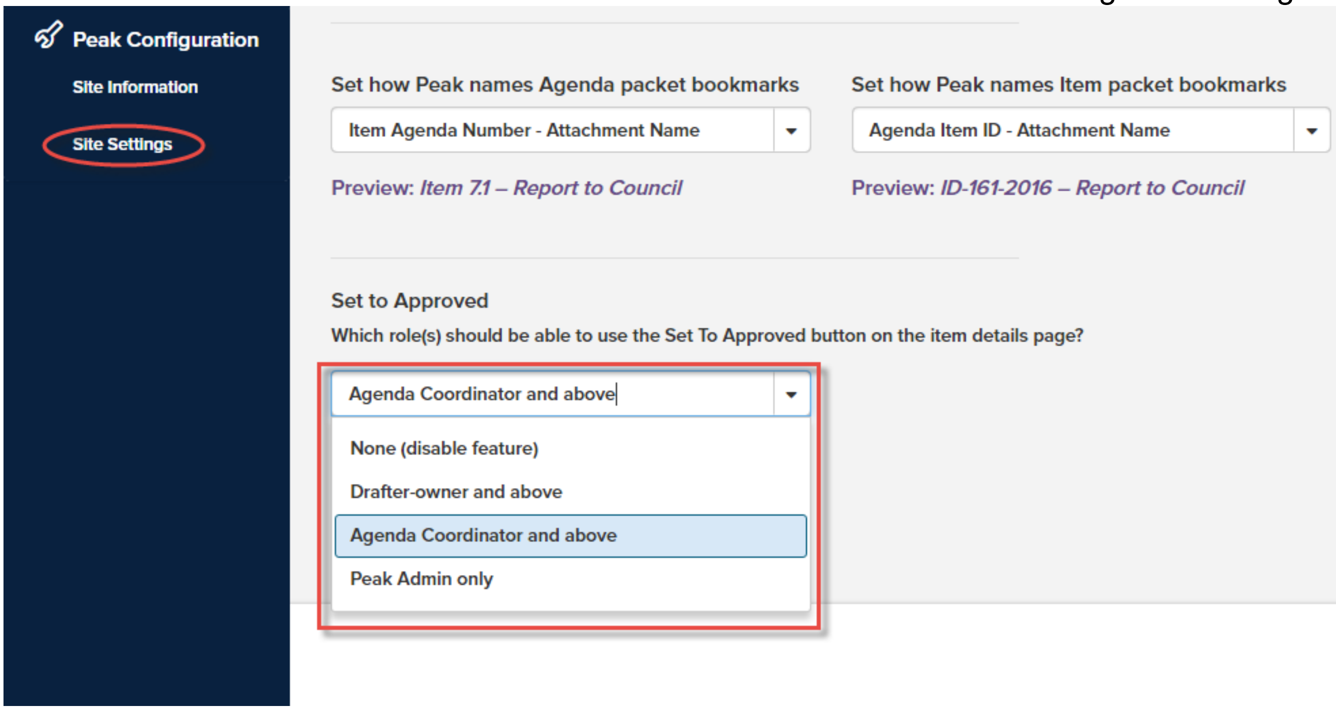
Item Packet Bookmark Naming in Peak

To complement the recent agenda packet bookmark naming feature, we've added the ability to select site-wide naming conventions for attachments and cover page bookmarks in agenda item packets. You'll be able to select your preferred naming convention from a drop-down menu on the **Admin** > **Peak Configuration** > **Site Settings** page. The setting will affect all item packets created for existing and new agenda items from the time it is set forward. See more details about the naming options in the full release note below.



Peak Admins Can Now Control Set to Approved Function Based on User Role

We've added a new **Set to Approved** drop-down menu on the **Admin** > **Peak Configuration** > **Site Settings** page. A Peak Admin can use this menu to set the minimum permission level needed to access the **Set to Approved/Set to In Draft** button found on the Agenda Item Details view. This button is used to bypass an approval workflow on a draft item and move it immediately to the Approved state, or, when unlocked by a Peak Admin or Agenda Coordinator, a user can move an approved item back to In Draft. The new site-wide setting enables a Peak Admin to control which users can access this function by selecting from four options in the drop-down menu: *None* (this option disables the feature for all users), *Drafter-owner and above*, *Agenda Coordinator and above*, and *Peak Admin only*. **Note:** The *None* selection here is not related to the None role; instead, it hides this button for any role in Peak, thus disabling the Set to Approved/Set to Draft function. The default selection is Drafter-owner and above.



Welcome Email for New Peak Users

When a new user is created from a person in Peak via the **Give a log-in to** link, Peak now sends a welcome email to the address entered in the person's record. We've used HTML to enhance the look and feel of the email and make it as user-friendly as possible. The email provides the username, a link for the user to set a password, a summary of the user's assigned role, instructions on how to log in after setting the initial password, and a link to the Granicus Help Center at help.granicus.com.

New Features

New user welcome email

When a user is created from a person in Peak via the **Give a log-in to link,** and the Admin clicks the **GENERATE LOG-IN** button, Peak sends an email to the address entered for the person record. The email contains the following:

- A welcome message with instructions and a link to set the initial password
- The user's role in Peak and an explanation of what that role can do (as well as a link to the corresponding Granicus Help Center page)
- Username
- Jurisdiction
- Instructions on how to log in to Peak once the user has set a password

We've use HTML to enhance the look and feel of the email as well as make it as user-friendly as possible.

Peak agenda packets now available on public View Pages

Agenda packets can now be linked to a public View Page when there is a MediaManager archive associated with a Peak meeting. This applies to those users who have the ability to record meetings and use Granicus's MediaManager platform to manage the recordings. In MediaManager, the Past Meetings Source needs to be set to Video Archives on the Basic View Properties page. Once published to the view page via the Agenda details page in

Peak by using the Publish function on the left toolbar, selecting Web, then choosing a view and clicking Publish, the agenda will display under Available Archives when the time of the meeting has passed and an archive has been created, processed, and made public.

Minor control and styling changes in Peak

We made some minor control and styling changes to the following areas:

- Entering a meeting body and meeting type for a platform-created meeting once accessed in Peak (type-ahead select is now supported)
- "Default" token is not split on an agenda template in **Admin** > **Agenda Items** > **Manage Item Template** when it has a long name
- The **Delegate** drop-down shows users with their pictures/granatars consistent with other lists of users in Peak

Item Packet Bookmark Naming in Peak

We've added a drop-down menu on the **Admin** > **Peak Configuration** > **Site Settings** page that gives you the ability to select site-wide naming conventions for attachments and the cover page bookmark in item packets. This field is in addition to the agenda bookmark naming drop-down menu already available.

The options for bookmarking attachments and cover pages for item packets are as follows:

1. Agenda Item ID – Attachment Name
2. Attachment Name

A preview of what the bookmark will look like is provided under the drop-down field.
Examples of the above options are as follows:

1. ID-161-2016 – Report to Council
2. Report to Council

For the respective cover page link, examples are as follows:

1. ID-161-2016 – Cover Page
2. Cover Page

The setting affects all item packets created for existing and new agenda items from the time it is set forward.

Cover page checkbox default setting on Site Settings page

We've added a new setting in **Admin** > **Peak Configuration** > **Site Settings** page to set the default to "Use cover pages with agenda packet" or "Do not use cover pages with agenda packet." The default is "Use cover pages with agenda packet." If set to use cover pages, the "Use cover pages" box is checked by default on the agenda packet creation form. If set not to use cover pages, the "Use cover pages" box is unchecked by default on the agenda packet form. The setting is site-wide and applies to all meetings.

This field does not affect the cover page setting at the item level.

This setting enables the Admin to turn cover pages on or off for an entire jurisdiction by default for agenda packet creation. The Agenda Coordinator or Peak Admin can always change the checkbox on an individual agenda packet generation.

Bug Fixes

Correct meeting location does not load when you change meeting bodies

When you create a meeting and select a meeting body, and then change to a different meeting body, the default location associated with that new meeting body now correctly loads on the form.

Amend function not operable after user deletes current record of an agenda item

We've fixed a bug in which deleting the most current record of an item did not result in the next-most-recent record being marked as current until the cache key expired an hour later. This prevented further use of the Amend function, since only the record marked as current can be amended.

Comment emails should be sent to previous approvers in an inflight workflow

When a comment is made during an inflight workflow, an email notification of this comment is sent to the drafter of the item, any previous commenters, and all approvers and FYIers in the current and previous phases of the workflow. Approvers and FYIers on future phases of the workflow who do not meet the aforementioned qualifications are not notified. Once a workflow is completed, any time a comment is made in this post-approval state, all previous approvers and FYIers that are a part of the workflow receive comment notification.

Skipping the final phase of a workflow does not immediately render item as Approved

When a Drafter-owner, Agenda Coordinator, or Admin skips the last phase of an inflight workflow, the item card now correctly transitions to an Approved status immediately. Prior to this fix, a screen refresh was sometimes necessary to change the item from In Review to Approved.

Skipping the final phase of a workflow does not immediately render item as Locked

When a Drafter-owner, Agenda Coordinator, or Admin skips the last phase of an inflight workflow, the item card now correctly transitions to an Approved status immediately and the item becomes locked. Prior to this fix, an item would remain In Review and unlocked even though the workflow showed it as Approved.

Deleting a meeting with an associated agenda item does not make the item available for use elsewhere

When a meeting is deleted from Peak, any agenda items that were assigned to the agenda for that meeting are now orphaned (i.e., their meeting body, meeting date, and section are cleared, and the item can then be deleted or added to the agenda for a different meeting).

Can't change the role of a group of platform users in Peak

We've restored the ability to assign a role to a group of platform users. Prior to this change, the **SAVE** button on the Assign Group Roles page would not save changes to the group based on the role selected.

Approval not changing item status from In Review

SalesForce Case #253886

In rare instances, an agenda item remains as IN REVIEW after completing the approval workflow. In another scenario, an item shows as IN DRAFT, yet the user has the item to approve on the dashboard with an inflight workflow; at the same time, the NEEDS MY APPROVAL filter on the ITEMS screen does not include this item. This situation occurred with the same item being viewed by different users (or the same user in different tabs or different browsers).

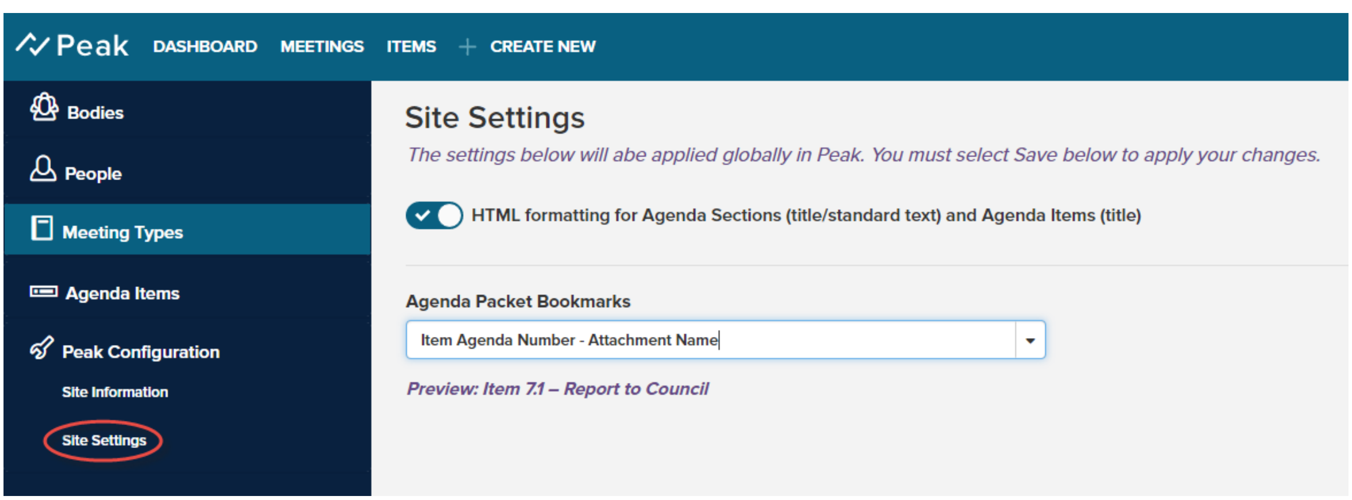
We've corrected this issue, and now when the second user saves the agenda item, the new state is refreshed on the agenda item card. This corrects any discrepancies between counts on the dashboard and ITEMS page. Items that have gone through a workflow now all show as APPROVED.

In general, a user should not have an agenda item open at length without a refresh. Without refreshing, a user will not see comments, as the screen does not update in real-time, e.g., a drafter does not see a reviewer's comment, updated state of the workflow until said drafter accesses the item again or refreshes the screen.

What's New in Peak Agenda Management, August 12, 2016

New Site Settings Page in Peak Agenda Management

We've added a new Site Settings page in the Admin section of Peak. This page will enable Peak Admin users to view and manage site-wide settings. You'll be able to set a default naming convention for agenda packet bookmarks using a drop-down menu. This page will enable us to add more site-wide settings in the future. The new page can be found under **Admin** > **Peak Configuration**. The existing Site Information page will remain for setting your jurisdiction name, address, and logo. See more about agenda packet bookmark naming in the full release note.



New Features

New Site Settings page in Admin

We've added a new page in **Admin > Peak Configuration** called Site Settings that will enable a Peak Admin to view and manage site-wide settings. The existing Site Information page will remain for jurisdiction name, address, and logo.

We've moved the existing setting controlling HTML formatting for Agenda Sections and Agenda Items from **Admin > Peak Configuration > Site Information** page to the new page. This change will not affect your current setting for HTML formatting.

Ability to specify naming conventions for agenda packet bookmarks

We've added a drop-down menu on the new **Peak Configuration > Site Settings** page that gives you the ability to select site-wide naming conventions for attachment and cover page bookmarks in agenda packets.

The options for bookmarking attachments and cover pages are as follows:

1. Agenda Item ID – Attachment Name

2. Item Agenda Number – Attachment Name

3. Attachment Name

A preview of what the bookmark will look like is provided under the drop-down field.

Examples of the above options are as follows:

1. ID-161-2016 – Report to Council

2. Item 7.1 – Report to Council (where agenda item was first item in section 7)

3. Report to Council

For the respective cover pages (if included in the agenda packet), examples are as follows:

A. ID-161-2016 – Cover Page

B. Item 7.1 – Cover Page

C. Cover Page

The setting affects all agenda packets created for existing and new agendas from the time it is set forward.

The bookmark will include the use of custom numbering on the agenda item if the Item Agenda Number option is selected. If the section to which the item belongs is unnumbered, bookmarks will contain only the attachment name (or "Cover Page").

Peak agenda packets now available on public View Pages

Agenda packets can now be linked to a public View Page when there is a MediaManager archive associated with a Peak meeting. We can make this available to those users who have the ability to record meetings and use Granicus's MediaManager platform to manage the recordings. In MediaManager, the Past Meetings Source needs to be set to Video Archives on the Basic View Properties page. Once published to the view page via the Agenda details page in Peak by using the **Publish** function on the left toolbar, selecting **Web**, then choosing a view and clicking **Publish**, the agenda packet will display under Available Archives when the time of the meeting has passed and an archive has been created, processed, and made public. **Note:** Please remember that you must first generate the packet via the **Download** option before you can publish it.

Please contact Customer Care to request that our design team edit your View Page Template accordingly if you'd like Peak agenda packets on your View Page.

Two additional fields available for item cover sheet templates

The Item Type and Agenda Section(s) to which an agenda item is assigned are now available to the Granicus design team for use in agenda item cover sheets. Please notify Customer Care if any fields are missing on your agenda item cover sheets.

Bug Fixes

Sorting in the Items index is not working

Sorting agenda items on the Items page by **Newest to Oldest**, **Oldest to Newest**, and **Item ID** is restored.

If agenda packet/item packet generation fails, users should receive error information

When generating a packet, users did not receive error information if there were errors in packet collation. Users would see the usual message that the packet was generating, but the **Download** button would never become available. We've added messaging such that users are aware of the error.

Assign Group Role text does not correctly update

This fix addresses an issue in which changing the role for a group in **Admin > People > Assign Group Roles**would not result in a text change next to the roles drop-down menu. The new role now correctly displays in the help text upon making a change.

Radio button controls should display as yes/no for agenda item cover pages

Radio button fields now display as **Yes** or **No** (rather than **True** or **False**) on Item cover pages generated on the item itself or on item cover pages generated as part of an agenda packet. Please consult the Granicus design team to determine which custom fields you need on cover pages for agenda items.

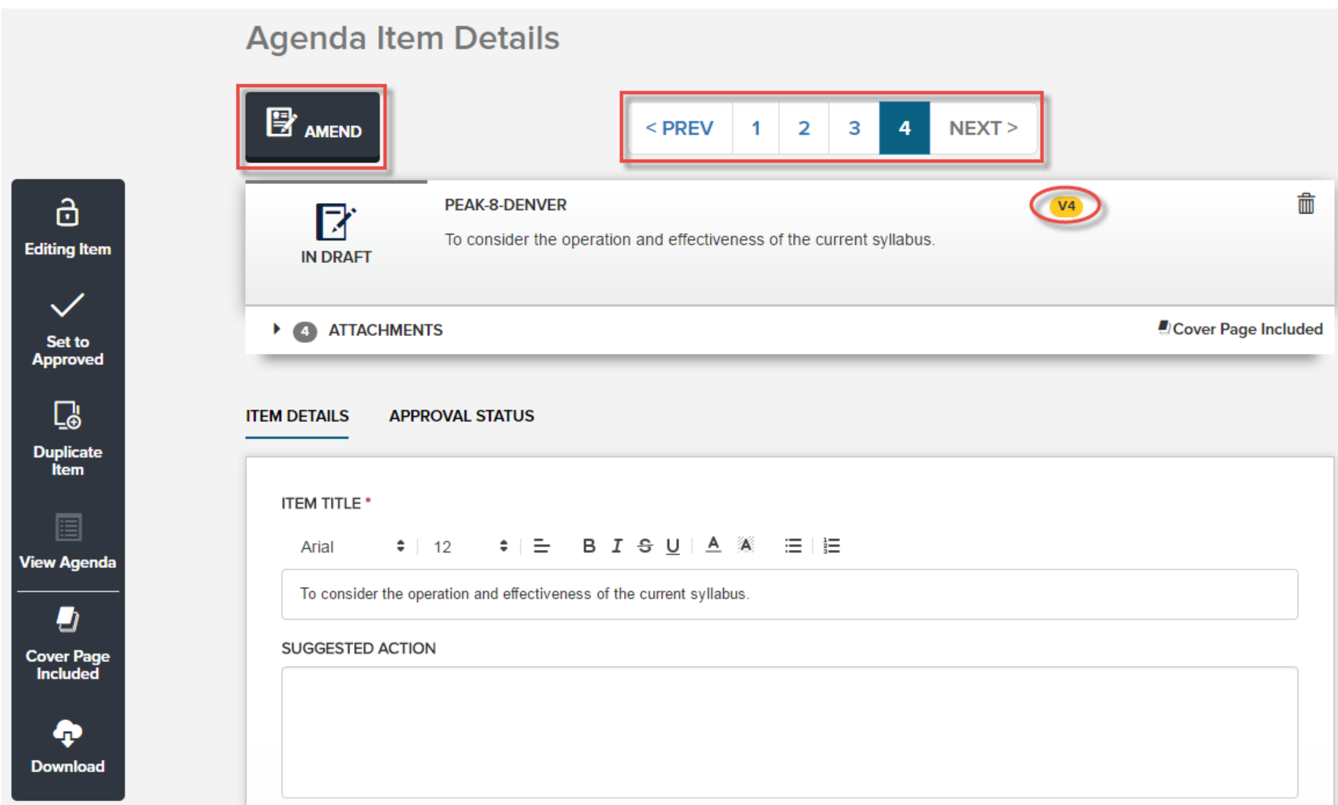
Unable to generate agenda packet; watermarks from doc files not showing in conversion

We've switched the converter used to change attachments from Word to PDF. The new converter supports more consistent formatting between the original Word document and the converted PDF file. A notable improvement is that watermarks (e.g., DRAFT) present on a Word document carry over to the converted PDF that would appear, for example, in an item packet or agenda packet.

What's New in Peak Agenda Management, July 15, 2016

New Amend Function in Peak: Create Multiple Records of an Agenda Item

There is a new **Amend** button on the Item Details page that enables you to create a new record of an agenda item before making changes. This feature is useful for tracking and viewing what changes have been made to your items over time. Distinct from the **Duplicate** function, this new option creates a new record of the item with the same agenda item ID; the file can then be modified as desired while the original record is retained. On July 15, 2016, all of your agenda items will be supplied with a record number of V1, which will be considered the original or “parent” record. Agenda item cards will contain the record number in the upper right, and each new record number will increase by 1: V1, V2, V3, etc. The most recent record is considered the current version and is editable; all previous records of the item will be locked by default but can be unlocked by an Admin or Agenda Coordinator and then edited as usual. You’ll have the ability to delete the most recent record, and the next most recent record will become current. Only the most recent record can be deleted at any given time, and an agenda item whose approval workflow is in process or that is scheduled on an agenda will not be amendable. The most recent record will be indicated by yellow highlighting on its number. From the Item Details page, you can navigate between different records via a navigation bar at the top of the page; click the **Prev** and **Next** buttons to move back and forth between the records. Read about more details of this feature in the Peak release notes below.



Recurrence Pattern and Meeting Type Now Editable in Peak Meeting Series

Peak Admins and Agenda Coordinators can now edit the recurrence pattern for meetings in a series. Changing the recurrence pattern as a series by selecting a particular meeting will reschedule all meetings in the series from the date edited forward. You’ll also be able to edit the meeting type as a series; this will update the current meeting selected and all future meetings. If items are already scheduled for the meetings whose meeting type is to be changed, you’ll get a message alerting you that agenda items scheduled for future meetings will be removed from the agendas for those meetings, i.e., the meeting body, meeting date, and meeting section will be cleared from the item. You'll be able to confirm or cancel this change. See more details below.

New Features

Ability to edit the meeting type for a recurring meeting series

Peak Admins and Agenda Coordinators can now edit the meeting type for a single meeting or all future meetings in a series. Changing the meeting type as a series will update the current meeting selected and all future meetings. If items are already scheduled for the meetings whose meeting type is to be changed, you'll get a message alerting you that agenda items scheduled for future meetings will be removed from the agendas for those meetings, i.e., the meeting body, meeting date, and meeting section will be cleared from the item. You'll be able to confirm or cancel this change.

It is not expected that a meeting series will have multiple meeting types across the series. If, however, this is the case, and changes are made to a meeting in the series, all future meetings in the series will be updated with the meeting type of the meeting that you're currently editing. This is true even if you're not updating the meeting type but updating only a meeting location, for example—Peak will update the location as well as the meeting type of the meeting for this and all future meetings in the series. The system alerts you when this is about to happen and asks you to confirm or cancel.

Editing a meeting type in Admin refreshes future meetings in a series

1. When a Peak Admin changes a meeting type in **Admin** > **Meeting Types** > **Manage Meeting Type** that implies a modification to a section or sections (renaming, reformatting, deleting/adding a section, re-sorting, modifying standard text for a section), if that meeting type has future meetings already scheduled and the Admin saves these changes to the meeting type, Peak will clear all future agendas for meetings using this meeting type and build a new agenda with the changes.
2. If items are already scheduled for a future meeting, these items will be removed from the meeting and become "unscheduled items," meaning the meeting body, meeting date, and section will be removed from the item. These items can then be added to the new agendas or other agendas in the system.
3. Upon clicking **Save** after changing a meeting type section, you'll see a warning message informing you that all future meetings with this meeting type will have their agendas wiped and built anew using these modifications to the meeting type. All agenda items on those scheduled meetings will move off the agenda and become "unscheduled items." This warning will show only if changes are made to a section. You'll then have the option of canceling the changes and preserving the agendas and their items, or confirming the changes.

Note: If you modify only the name of the meeting type, archive folder, agenda template, or the numbering scheme, this does not constitute a change to the section information. Thus, already scheduled meetings on a future date using this meeting type will preserve their agenda and the items on that agenda.

Ability to edit a recurrence pattern for a meeting series

Peak Admins and Agenda Coordinators can now edit the recurrence pattern for meetings in a series. Changing the recurrence pattern as a series selecting a particular meeting will rebuild meetings (and itemless agendas from the meeting type) from the date edited forward.

We recommend not selecting a meeting on a past date, as this will wipe out any agendas on past meetings. Also note that any changes to the meeting recurrence patterns will rebuild the series from the meeting selected forward.

Even if an existing future meeting is part of the reconstructed series, it will still be rebuilt (and thus, the agenda wiped). If the new pattern includes dates for meeting that are within the start and end date range but are before the current meeting being scheduled, those meeting will not be scheduled.

If items are already scheduled for any future meeting as part of the series, you'll get a warning message informing you that agendas will be wiped and any items on those previous agendas will become unscheduled, meaning the meeting body, meeting date, and meeting section will be cleared from the item. You'll be asked to confirm or cancel these change to the recurrence pattern.

Note: Any existing monthly meetings you have set up before this upgrade will display no data in the **ON THE** and **DAY** fields when you edit the meeting as a series. This won't affect anything, and you can continue business as usual. If you attempt to repopulate either field, the system will detect this as a change to the recurrence pattern and will rebuild those agendas from the date edited forward, removing agenda items from the agendas. You'll receive a warning that these meetings are about to rebuilt. If you confirm, you'll need to re-add any agenda items from those agendas. We recommend that you ignore that these fields are blank. You can modify the location or any other field that doesn't affect the recurrence pattern, and it won't disturb the existing agendas. This issue will occur only for existing monthly meetings. Any newly created monthly meetings will have data populated in these fields.

New Amend function enables you to create multiple records of an agenda item

Peak Admins, Agenda Coordinators, and a Drafter-owners can now amend an agenda item to create a new record of it. This feature is useful for tracking what changes have been made to agenda items.

We've added an **Amend** button to the Item Details page. When you click the **Amend** button, you'll first get a confirmation modal. If you confirm amendment of the item, a copy of the item is made, and the new record displays. This new version will have the same Agenda Item ID, metadata, and attachments. Comments and loaded approval workflows are not copied over. If you cancel, no additional record is created and you're returned to the current version of the item.

Note the difference between this and duplicate function: Duplicate makes a new item with a new agenda item ID; this new function creates a new record of the same agenda item ID so that the information on this new record can be modified if desired while the original record is retained.

When a record is created, the new record by default is an exact copy of the previous until you make changes to it. The previous record becomes locked.

The record numbers begin at 1 and increase by 1 each time you click the **Amend** button and confirm the operation. Upon amending, you'll land on the Edit page of the new record, and that record number will be highlighted on the agenda item card and in the navigation bar at the top of the page.

If changes need to be made to previous records(s), they can be unlocked by an Admin or Agenda Coordinator, and then edited by an Admin, Agenda Coordinator, or Drafter-owner.

The most recent (highest numbered) record is always considered the "current" record. When this feature is released on 7/15/16, all of a jurisdiction's items will be labeled with a record number of V1. All of these items are considered "current" at that point.

You can create a record of an item only if the item is the current (most recent) item and if the workflow of the current item is not in progress. Unlike duplication, amending will copy the item's drafter from the source item record regardless of who is doing the amending. After a new record is created, the status will be set to IN DRAFT, and the item will be unlocked.

If the current/newest record is deleted, the next most recent record becomes the current one and becomes amendable. The version number in this case would be re-used (e.g., if delete record V5, record V4 becomes current; if you then amend record V4, V5 is created and becomes the current record).

Edit a record of an agenda item

Once you create a new record of an agenda item, you'll have the same and complete editing capability that currently exists for an agenda item. Separate records are considered as unique items even though they have the same agenda item ID. Changes made to the new record do not affect or change any of the information on the original item or other records of the item.

Delete records of an agenda item

Admins, Agenda Coordinators, and Drafter-owners can delete a record of an agenda item with the **trash can** icon provided that both of the following conditions are met:

1. The item is the current record (highest record number).
2. The item record is not associated with a meeting.

In other words, you can never delete the original "parent" record until all its "children" are deleted.

Deletion of the unscheduled current record of the item can be accomplished from the Item Details page or from the Items page as normal. Upon clicking the **trash can** icon from the Item Details page, you'll be prompted with a confirmation as normal. Upon deleting the current item from the Items page, you'll be prompted with a confirmation including the record and agenda item title of the item you're about to delete.

Deleting a record does not delete the original agenda item, only that record of the item. Once a record is deleted, the next-highest-numbered record of the item becomes the "current" item, and it too can be deleted provided it is not assigned to a meeting. The process may continue in this fashion all the way through record V1; however, an unscheduled earlier record can never be deleted unless all later records are deleted first.

Edit/view previous records of agenda items

Note: All of your existing items on 07/15/16 will be updated to show that they are record number V1. All of the V1s are highlighted in yellow, indicating that this is the latest record of the item.

From the ITEMS page or for records of items placed on an agenda, users can take the following actions:

1. Edit/view the current record of an item (this is an existing functionality).
2. Edit/view previous records of an item by clicking the record number in the navigation bar on the Item Details page, from the Items page, or from the agenda where this record of an item is assigned.

View/edit rights based on users' roles remain the same on agenda items. The previous record is locked when an item is amended and a new record is created. A Drafter-owner may continue to view that earlier record, but Peak requires a Peak Admin or Agenda Coordinator to unlock that record of the item in order for the Drafter-owner to edit. Other Drafter users continue to see other people's items and their records in read-only mode whether they are locked or not. Users with the None role are allowed to access only those records in read-only mode for which they are involved in an approval workflow that is in progress or has been conducted, but they are allowed to do so only from the Items page or the approval email.

Agenda item record navigation

We've added a navigation bar to the top of the Item Details page for Admins, Agenda Coordinators, and Drafters. This enables users with these roles to navigate between agenda item records using one of the following methods:

1. Clicking a record number to view it (all existing items and any new items start with V1).
2. Clicking the **Prev** or **Next** button to navigate to the previous or next record, respectively.

The record number for the currently displayed record is highlighted in the navigation bar. When you're editing a record of an item from an agenda, Peak will display the Item Details page with that record of the item highlighted in the navigation bar.

Currently the Items page shows all records of agenda items. The latest (current) record of the item has its record number highlighted in yellow.

The navigation bar will expand and collapse as records are created and deleted, for up to five records. Once more than five are created, the navigation bar will show a range of five records, which will shift as the **Prev** and **Next** button are used.

Users with a role of None who are approvers or FYI-ers on an item that has multiple records will have access to the particular record from the Items page as well as from the link in the approval email. They will not be able to access other records, as the navigation bar will not be available to them on the Item Details page.

Record number label on the item card

We've added a record number label to the agenda item cards in Peak. This label consists of a "V" and a number that indicates the record number. Record numbers always start at 1 and increase by 1 for each record created. All existing items on 07/15/16 will be labeled as V1. Any new agenda items created after this date will also be labeled V1. The label is not clickable. The record of an item with the highest version number is considered the current record and will be highlighted in yellow. The Items page displays all records of items, which will be grouped. The current record is listed first, and the earlier records will follow.

Note: You can filter the Items page by agenda item ID in the **Search** field in order to see all records of a particular item.

Bug Fixes

UFC PDF conversion: formatting issues with Word attachments in Peak agenda packets

The Universal File Converter now has an additional PDF document converter with better accuracy for Microsoft Office files.

Agenda packets will not generate in Chrome when the event name contains commas

Commas are now supported in event names for meetings created in the platform. Prior to this fix, if a platform meeting event name had commas in it, when you attempted to create an agenda report for this meeting, it would fail. Other browsers did not pose this problem. The agenda packet, on the other hand, uses separate logic and would generate fine in Chrome. Now, Chrome can generate agenda reports for meetings created in the platform that include commas in the event name.

Agenda item cover pages will not generate if item title contains double quotation marks

Agenda item cover pages, item packets, and agenda packets including cover pages will now generate even if the agenda item has double quotation marks in the title.

Drafter can reorder and delete sections of an unlocked agenda with a Final status

Users with the Drafter role should not be able to manipulate agenda sections in an agenda whose status is Final. We've fixed this issue, and Drafters are no longer able to modify a finalized agenda if it is unlocked.

Clearing a meeting date from an agenda item does not remove the item from the agenda

When the meeting date is cleared from an agenda item via the Item Details view ("unscheduling the item") and the item is saved, the item card is now correctly removed from the agenda to which it was previously assigned.

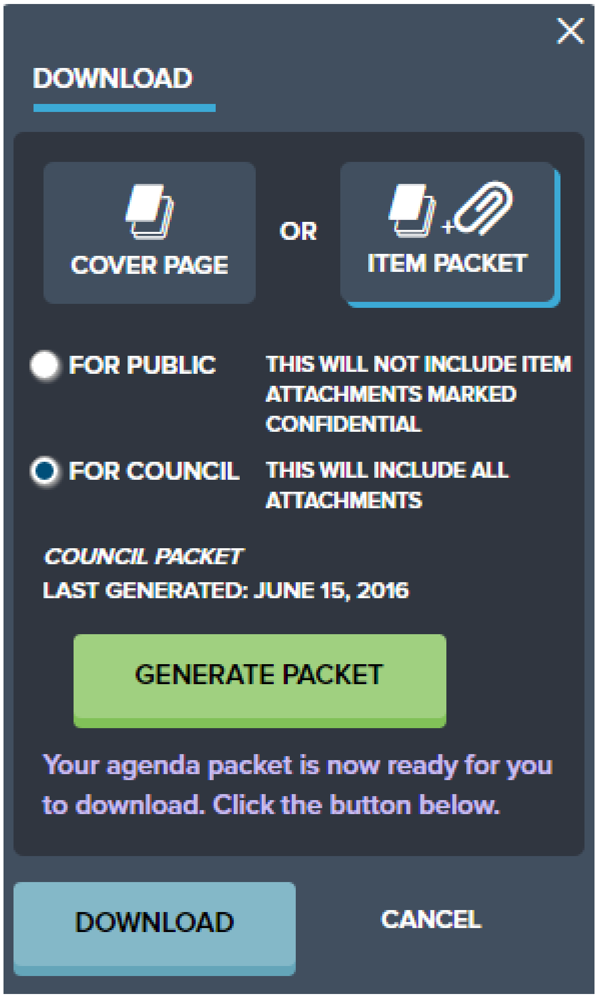
What's New in Peak Agenda Management, June 17, 2016

Agenda Item Packets Available in Peak

Administrators, Agenda Coordinators, and Drafters can now generate an agenda item packet for a given agenda item. Packets can be created for the public or for council and will contain the cover page along with attachments as ordered on the agenda item. You can generate this packet from the Agenda Item Details page by clicking **Download**, selecting **Item Packet**, selecting **For Public** or **For Council**, and clicking the **Generate Packet** button. Once the packet is complete, click **Download** to view the PDF packet.

- The public packet contains only those attachments labeled as **Public** in the attachment privacy settings.
- The packet for council contains all attachments that are marked Public as well as those parked Private. Attachments that are marked as Hidden are not included in the council item packet.

The agenda item and each attachment are bookmarked in the packet. Pages in the item packet are numbered consecutively starting at **1** in the bottom right corner.



Ability to Edit a Meeting Series in Peak

This function enables you to edit the time, location, and description of a recurring meeting. On the Meeting Details page, you'll select the meeting from the series on which you'd like the changes to start. Select the **Series** tab, make any needed edits, and then click **Save**. The updates will be applied to this and all subsequent meetings in the series. You can also still edit single instances of a recurring meeting by selecting the **Occurrence** tab (which is the default). Changes will be applied only to that meeting as usual.

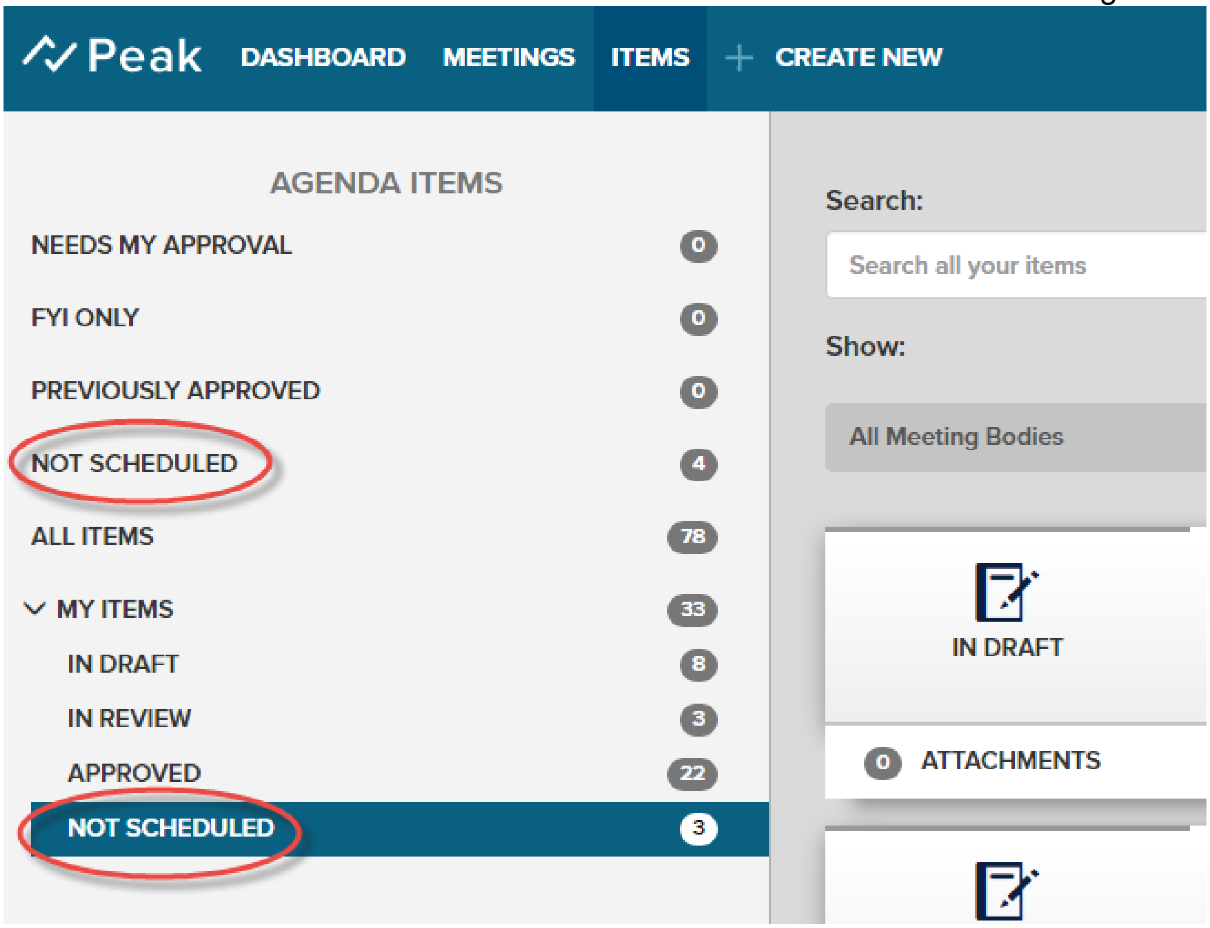
Peak Items Page: New Filter Option

We've added a **Not Scheduled** option on the Items page so you can easily filter by agenda items with no meeting date. The filter appears in three places:

1. The main **Not Scheduled** filter on the left pane provides a count of all non-scheduled agenda items and displays those items when selected.

2. There is also a **Not Scheduled** filter under My Items on the left pane to show only those items that you've drafted but not selected.

3. Finally, a **Not Scheduled** entry has been added in the **Meeting Date** drop-down filter. This filter can be combined with the Meeting Body filter; for example, to find those agenda items belonging to the City Council meeting body but that have not been scheduled on an agenda.



New Features

Most recent saved details of agenda item are now reflected in agenda packet

Agenda packets now contain agenda item cover pages that reflect the latest saved details of the agenda item. You do not have to first generate the cover page on the agenda item details page itself. Prior to this fix, you had to download the cover page from the agenda item details page, triggering a regeneration that made the cover page available for the agenda packet.

Message text adjusted on download menu to indicate that packet generation is in progress

Text on the **Download** menu on the Agenda Details page now indicates that agenda packet generation will take a few moments. This solves confusion about whether a packet is generating, and avoids multiple clicks of the**Generate Packet** button while packet collation is working behind the scenes.

Title not updating when administrator edits a meeting type, then selects another

If the administrator selects a meeting type to edit, and then selects another meeting type from the list on the left, the Title field now properly updates to reflect the meeting type currently being viewed.

Include All Cover Pages option for agenda packets is now Use Cover Pages

We've changed the wording of the checkbox on the **Download** menu for agenda packets to avoid confusion. While the wording has changed, the function remains the same. The option to **Include All Cover Pages** is now called **Use Cover Pages**. The checkbox defaults to checked. When the box is checked, agenda items marked individually to include cover pages will have cover pages when the packet is generated. If you'd like to exclude all agenda item cover pages from the packet, uncheck the box prior to generating the agenda packet. Unchecking the**Use Cover Pages** option overrides any individual agenda item cover page settings; i.e., when the box is not checked, no cover pages will be included, regardless of individual settings.

Ability to create council member item packet

Administrators, Agenda Coordinators, and Drafters now have the ability to generate an agenda item packet for council members that combines an agenda item cover page with attachments for a given agenda item into a single PDF. The packet consists of the agenda item cover page/report first, followed by the public and private attachments as ordered on the agenda item.

You can generate this packet by clicking **Download**, selecting **Item Packet**, selecting the **Council** option, and clicking **Generate Packet**. Once the packet is complete, click the **Download** button to view the PDF item packet.

The council agenda item packet contains the agenda item report and all attachments that are marked **Public** and those marked **Private**. Attachments that are marked as **Hidden** are not included in the council member agenda item packet.

The agenda item and each attachment are bookmarked in the packet. The bookmark title is [**agenda item ID**]—[**attachment name**]. Pages in the item packet as numbered consecutively starting at **1** in the bottom right corner.

Note: Generating a cover page report on its own is a **Public** version and does not include any private attachments. If the council member version of the cover page is desired, generate it with the council member agenda item packet as described above. Additionally, if a council agenda packet is created from the agenda for which this item is a part and **Use Cover Pages** is checked, the council agenda packet will pick up the council of the items' cover pages provided those items are not marked to exclude the cover page.

Ability to create public item packet

Administrators, Agenda Coordinators, and Drafters now have the ability to generate an agenda item packet for the public that combines an agenda item cover page with attachments for a given agenda item into a single PDF. The packet consists of the agenda item cover page/report first, followed by the public attachments as ordered on the agenda item.

You can generate this packet by clicking **Download**, selecting **Item Packet**, selecting the **Public** option, and clicking **Generate Packet**. Once the packet is complete, click the **Download** button to view the PDF item packet.

The public agenda item packet contains the agenda item report and all attachments that are marked**Public**. Attachments that are marked as **Private** or **Hidden** are not included in the public agenda item packet.

The agenda item and each attachment are bookmarked in the packet. The bookmark title is [**agenda item ID**]—[**attachment name**]. Pages in the item packet as numbered consecutively starting at **1** in the bottom right corner.

Agenda item cover page linked from agenda report

The agenda item cover page is now linked from the agenda item title in the agenda report as a PDF link on the agenda item’s title. When a user clicks the title, it will either redirect to the cover page or download the cover page in a PDF reader for that agenda item.

Customers should let the Granicus design team decide whether they want to have their agenda item titles appear as text links (using any optional formatting they provide at the item level) or as standard formatted hyperlinks to the item's cover page on agenda reports.

IMPORTANT: Agenda item cover pages are not currently generated when an agenda report is created. For those customers that will use agenda item titles as links to the respective cover page, if you make any changes to the agenda items or add a new item to your agenda, or if you have items marked as **Private** on your agenda, you should generate a **Public** agenda packet, which will create public cover pages for all the items on the agenda that would have a cover page included in the agenda packet. In this case, a generated agenda report will contain links to all updated public cover pages for those agenda items. **If this is not done, either the link will not function (for a new item), it will point to an older version of the cover page for the item, or it could be linked to a council version of the cover page containing private attachments.**

Items page: ability to filter by agenda items with no meeting date

This feature adds a **Not Scheduled** filter option on the Items page. The filter appears in three places:

1. The main **Not Scheduled** filter on the left pane provides a count of all non-scheduled agenda items and displays those items when selected.

2. There is also a **Not Scheduled** filter under **My Items** on the left pane to show only those items that you’ve drafted but not scheduled.

3. Finally, a **Not Scheduled** entry has been added in the **Meeting Date** drop-down filter. This filter can be combined with the **Meeting Body** filter; for example, to find those agenda items belonging to the City Council meeting body but that have not been scheduled on an agenda.

Ability to edit meeting series time, location, and description

This function enables you to edit the time, location, and description of a recurring meeting. On the meeting details page, you’ll select the meeting from the series on which you’d like the changes to start. Select the **Series** tab, make any needed edits, and then click **Save**. The updates will be applied to this and all subsequent meetings in the series.

You can still edit single instances of a recurring meeting by selecting the **Occurrence** tab (which is the default). Changes will be applied only to that meeting as usual.

Notes: The date of the meeting is not shown as a field on the **Series** tab, as this field is currently not allowed to be changed; neither is the recurrence pattern.

If a one-time or recurring meeting is created in the platform, you must first edit the agenda details in Peak and populate a status, meeting body, and meeting type. Then you allowed to examine the meeting details and edit one-time meetings or recurring meetings as described above. For Peak- or platform-created meetings, once the meeting body and meeting type are selected, these are not allowed to be changed.

Icon indicating a recurring meeting has been added to meeting card

An icon (two circular arrows) has been added to the meeting cards on the left side of the calendar. The presence of the icon indicates that the meeting is part of a series. This icon is also visible on the meeting cards when you’re editing a meeting from a series as an individual meeting, or editing the series as a whole.

Bug Fixes

Agenda item updates are reverted with certain click paths

If an agenda item is edited from an agenda and the title of the item is changed and saved, when the agenda is subsequently examined, the title of the agenda item is correctly updated.

Unsaved changes stored on agenda items when modifications made, but not saved, and then other actions are taken

If an agenda item's details are modified but not saved, the following actions do not result in saved changes: viewing the agenda on which this item is assigned, generating a cover page report, or using any of the buttons on the left side of the item details screen. You must always click the form's Save button to preserve any changes made to an agenda item.

Download button never becomes available on first packet generation attempt

This fix addresses an issue in which the **Download** button was not made available after you clicked the **Generate Packet** button. This happened in a number of scenarios when a cover page had not been previously generated on the item details page of an agenda item, and you then specified that the agenda packet should include agenda item cover pages.

Recurring OPEN/SAVE/CANCEL modal in Internet Explorer and Edge 13 from downloading an agenda report interferes with page rendering/operations in Peak

- SalesForce Case #253809

This fix addresses an issue in which creating an agenda report in Internet Explorer or Edge caused the Windows OPEN/SAVE/CANCEL dialog box to continually appear after the agenda report was dismissed and the**Download** menu closed, preventing further interaction with the Peak application without first responding to this persistent window.

Fix stale data for updating a meeting date

This fix updates approval emails such that in the rare case that an agenda item changes to a new meeting date, the emails are updated to reflect the changes.

What's New in Peak Agenda Management, May 20, 2016

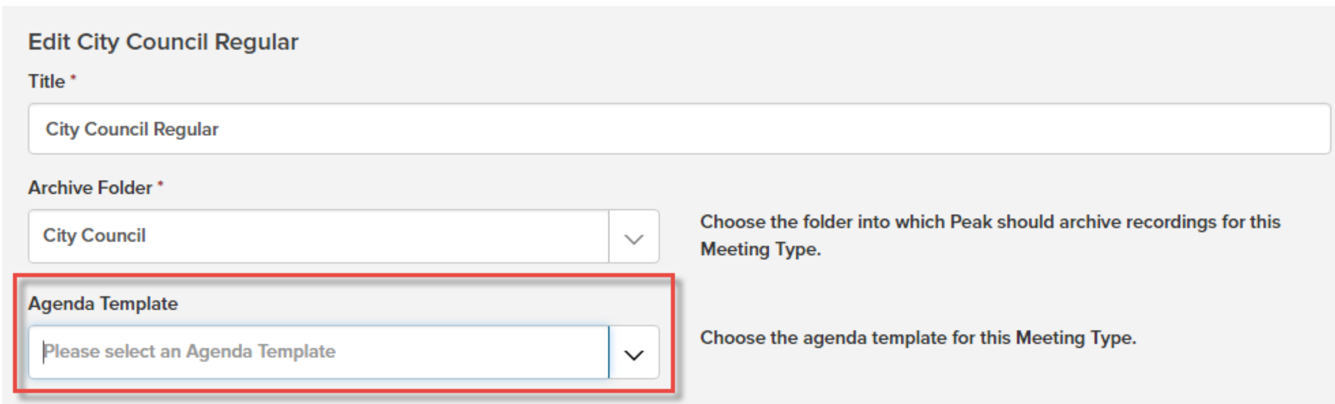
New Features

Agenda Item Cover Pages in Peak

This new feature gives you the option to download an agenda item cover page in DOC or PDF format from the Agenda Item Details page and to include these cover pages in agenda packets. Also referred to as a staff report, summary report, or item memo, cover pages contain all the information included on the Item Details page. When you create an agenda packet, you'll be able to choose whether to include cover pages in your packet via an **Include**/**Exclude** button. If you elect to include them, the packet will contain a cover page for each agenda item that precedes its attachments. Attachments are printed as text or as links (as specified to the Granicus design team) on the report if marked as **Public**. Via the Agenda Item Details page, you can also control whether a specific agenda item should include a cover page using a new **Cover Page Included** option on the toolbar. The Granicus design team will work with you to determine which fields—including custom fields—display, and in what order you'd like fields to appear on the report. Contact Customer Care to request an Agenda Item Cover Page template for your Peak system.

Multiple Customized Agenda Report Templates Available for Peak

Jurisdictions and organizations using Peak now have the option of requesting multiple custom agenda templates. This enables you to have customized format and logo for as many meeting bodies as you need. All report templates created by Granicus design staff will populate a drop-down menu in **Admin** > **Meeting Types** > **Manage Meeting Type**. Peak Admins can assign a template to a meeting type using this menu, and the agenda report template assigned will be the default for any meeting using said meeting type. This default can be changed at any time by an Admin. Admins can also leave the **Agenda Template** field blank, in which case pre-existing and new meetings created with this meeting type will continue to use the site's default agenda report template. Contact Customer Care to request your customized report templates.



Agenda item title now included in approval workflow email templates

An agenda item's title has been added to the following approval workflow emails:

• Approval Workflow Cancelled

• Approval Workflow Approved

• Approval Workflow Skipped

• Approver Removed

Bugs

Agenda sections not staying where placed

Agenda section sorting was not working properly on agendas created from a meeting type with more than ten sections. Sections now remain where placed using the drag-and-drop function, and the agenda report and packet reflect the correct section order.

What's New in Peak Agenda Management, April 22, 2016

New Features

Ability to replace an attachment on an agenda item

This capability enables Drafters (their items), Agenda Coordinators, and Administrators to replace an existing attachment with an updated copy of the file or an entirely new attachment.

To download the existing attachment, click the file name. To replace an attachment, click the **pencil** icon on the respective attachment. Click the **Replace Attachment** link or drag and drop the new file into the highlighted area. The same file types that are supported for new attachments to agenda items in Peak are supported as replacements.

Original attachment privacy settings are preserved after the attachment is replaced. The attachment name is replaced with the new attachment's file name. If the new attachment's file type is different, the associated icon is rendered. You can change the attachment name and attachment security/privacy before replacing.

To make the replacement permanent, click the **UPDATE** button. To undo the replacement and keep the original file, click **CANCEL**. If the user clicks **UPDATE**, the new file will be uploaded, and a confirmation message will be given. Any documents or packets generated from this point forward will include the new attachment.

Email notifications for workflow comments

Peak now sends email notifications whenever a comment is created on an agenda item. Emails are sent to the item's drafter, the person making the comment, previous commenters, and people in an inflight workflow.

1. Whenever a comment is added to an agenda item, the drafter-owner receives an email identifying who made the comment, the agenda item's ID and title, and the text of the comment.

2. Who receives comment notification is determined by whether an item contains an in-flight workflow:

- If an item contains an in-flight workflow, any approver or FYIer in any phase will get an email when a comment is added.
- If an item does not contain an in-flight workflow, the Drafter-owner or any person who has previously commented will receive an email when a comment is added.

3. A link is provided in the email that will take the user to the agenda item.

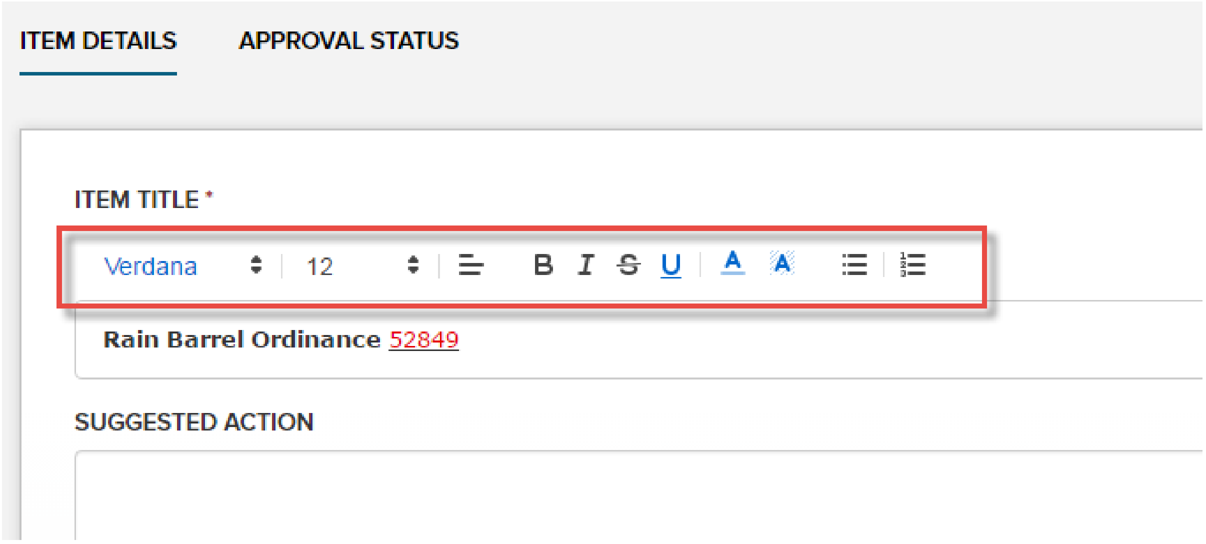
Custom item fields now included in agenda reports in Peak

Custom fields set up via **Admin** > **Manage Item Template** can now be published to agenda reports and packets. These field options include a variety of types, such as drop-down menus, date pickers, and text boxes. Once you've created the desired custom fields, you can make a request for these fields to show up under the related item on the agenda report. A field will display only if there's data entered in it for a given agenda item. Note that if you create additional fields after your request has been processed, you'll need to make an additional request to include the new custom fields on your reports. Make your request here.

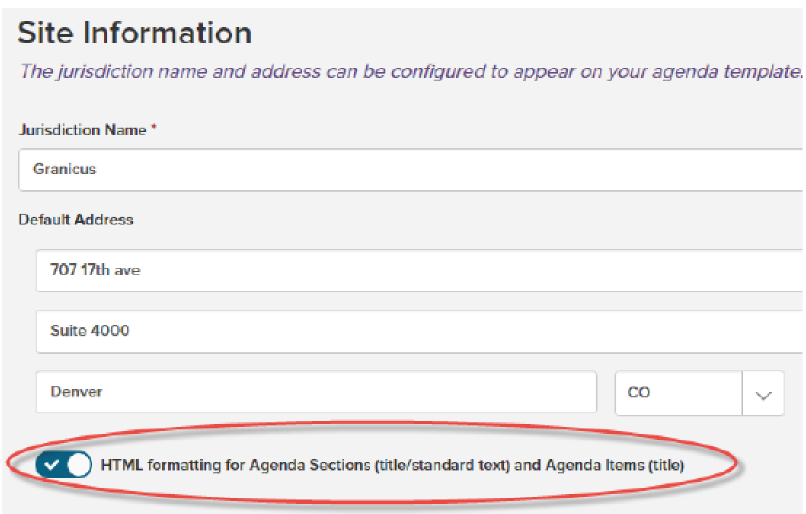
New Text Formatting Capability for Agenda Items and Agenda Sections in Peak

This new feature enables easy, word-processor-style formatting of the agenda item's title. Formatting options include typeface, point size, bold, italic, strikethrough, underline, font color, background color, and standard lists (bullets or numbers). Paragraph alignment/justification is also available on standard text of an agenda section and on an agenda title. Admins can similarly format the section titles and standard text in meeting types via **Admin** > **Meeting**

Types > **Manage Meeting Type**. The data will print on the agenda report as it's been formatted in the fields. When agendas are published to the platform or iLegislate, the HTML is stripped off and plain text is displayed.



To turn formatting on or off, go to **Admin** > **Peak Configuration** > **Site Information**. See more details on this functionality in the full release note.



Bug Fixes

Modal resulting from delegatee selection displays Delegate confirmation as a button within a button

On approval workflows, the Delegate operation brought up a modal window in which the **Delegate** button displayed as a button inside a larger button. It is now a single button consistent with others on modal windows across the application.

Editing an agenda item via its agenda displays hidden custom fields during current and subsequent edits

When you visit an agenda page and then examine the details of an item therein, hidden custom fields that do not have a value for this item no longer display.

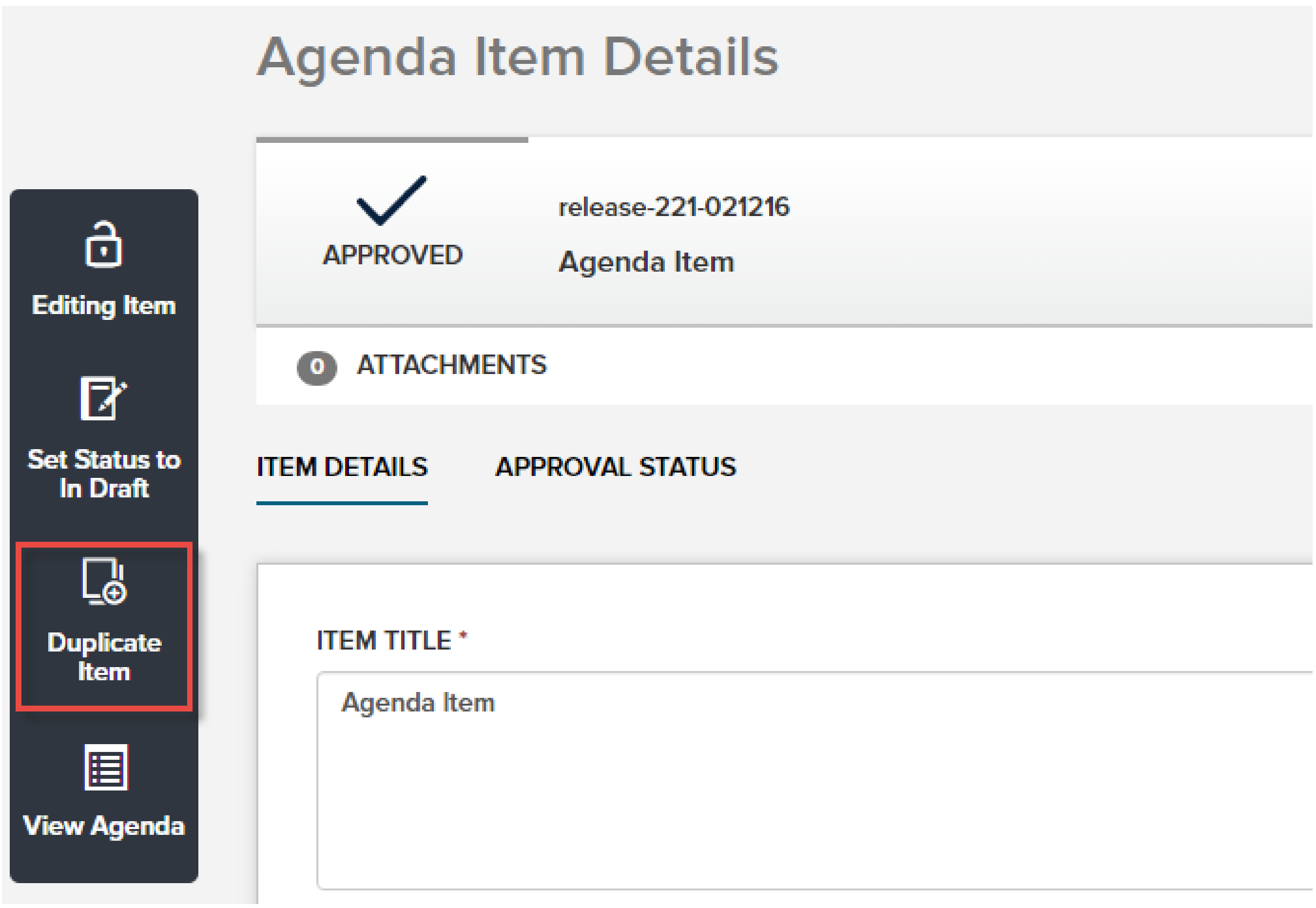
What's New in Peak Agenda Management, March 25, 2016

New Features

Duplication of Agenda Items in Peak Agenda Management

With this new feature, you can now duplicate individual agenda items. This saves time and energy used on the creation of multiple similar items from scratch. Once a duplicate is created, the two items are independent of each other and can be edited and deleted without either affecting the other, so you can customize the copied item as needed.

New agenda items can be created by copying an existing agenda item via the **Duplicate Item** button on the left menu bar on the Agenda Item Details page.

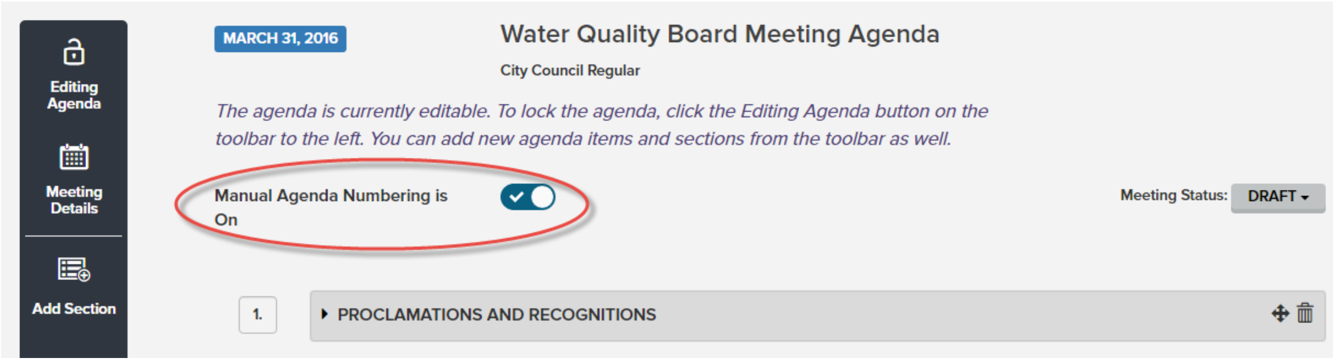


This action creates an item with the same metadata, attachments, and approval workflow phases. The item is assigned a new Agenda Item ID, and the **Meeting Date** and **Sections** fields will be blank. The **Drafter** field should be updated to reflect the name of the drafter using the copy. Note: Only Agenda Coordinators and Admins can change the **Drafter** field of the duplicate item, i.e., assign the item to a different drafter.

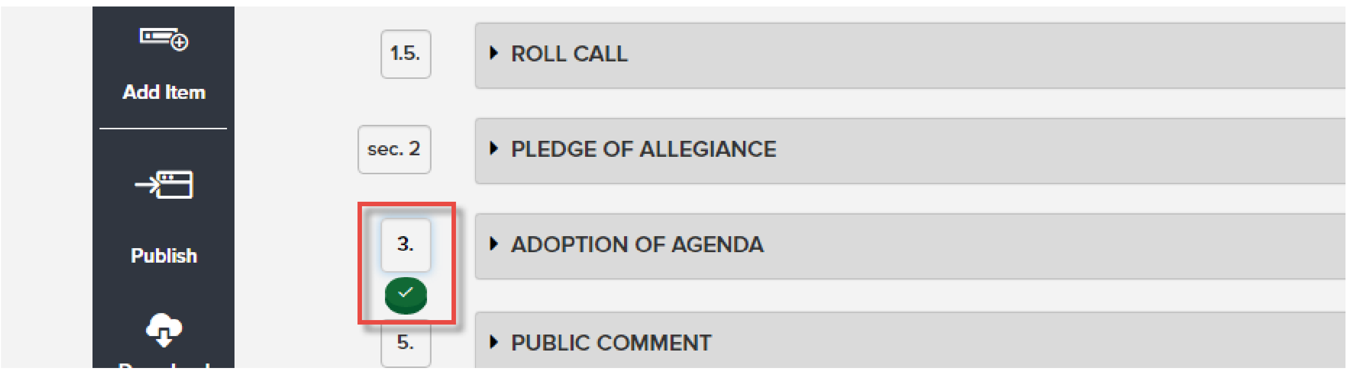
See more details about this functionality in the full release note.

Ability to Edit Agenda Section and Item Numbers in Peak

Admins and Agenda Coordinators can now click a toggle button on the agenda to **On** to enter custom numbering of the agenda sections and their items, or to **Off** to use the standard numbering scheme associated with the meeting type. This feature allows for flexibility of numbering when the available default numbering schemes do not meet your needs or you need more variance of number format within a single agenda.



Click the box to the left of the agenda section or item, type the desired number value, and then click the green **checkmark** button to apply the new number value:



Agenda item numbers are edited in the same manner. Custom numbering for agenda sections and items can be up to 15 characters. These values are presented on the agenda report and in the agenda packet and on published agendas to the platform, ILegislate, and View Pages.

Roman numeral support for agenda numbering

The following formats have been added to complement the existing set of numbering schemes that can be applied to meeting types:

• Roman Numeral uppercase for sections (lowercase letters for items)

• Roman Numeral uppercase for sections (uppercase letters for items)

• Roman Numeral uppercase sections (numbers for items)

• Roman Numeral lowercase for sections (lowercase letters for items)

• Roman Numeral lowercase for sections (uppercase letters for items)

• Roman Numeral lowercase for sections (numbers for items)

Update Kendo UI to Q1 2016 SP1

Peak uses underlying third-party Kendo date picker and calendar controls across the application. Updates to Kendo were completed that address several styling and software issues.

New move cursor and increased button spacing for drag-and-drop functionality

To improve usability we have changed the following:

1. We added a **move** cursor to give users feedback when hovering over the **move** (drag-and-drop) icon.
2. We increased spacing between the **pencil** (edit), **move** (drag-and-drop), and **trash can**/**X** (delete) icons to make it easier for you to select what you intend to.
3. We increased the size of the above icons to make them easier to select in drag-and-drop.
4. We added a clickable **hand** cursor that appears when hovering over the **X** (close) button on the dark gray box used to give a username to a person or edit the user role.
5. Links in the dark gray detail panel (e.g., the user role dialog box mentioned above) are now light blue text that changes to white when hovered over.

Image Conversion for Peak Reports and Agenda Packets

By popular request, the Universal File Converter now allows for PDF conversion for image files (.tiff, .tif, .jpg, .jpeg, .bmp, and .png) attached to agenda items in Peak. Once these items are placed on an agenda, the agenda report and packet will contain links to the PDF versions of these files. The agenda packet will also contain the PDF version of the files appended to packet (after the report) and bookmarked. When the agenda is published to iLegislate or the web, PDF versions of these files are available to the platform, iLegislate, and View Pages.

Bug Fixes

Items page should be searchable by Item ID

Users can now search agenda items by Item ID in addition to the item title. The search of these two agenda item fields will be supported on the Items page as well as on the agenda view with the use of the **Add Item**button. This search filter works in combination with any other search filters on these pages.

Infinite spinner results when attempting to create a meeting after examining meeting details

You can now create an additional meeting without issue by clicking **+ CREATE NEW** > **MEETING** after you've been examining meeting details.

Momentary denial window pops up for Drafter viewing final agenda

When a Drafter clicks on an agenda that has a "final" status from either the dashboard, the item details page (View Agenda), or the calendar, the drafter is no longer momentarily given a message that they can't access the agenda.

A blank Meeting Date on the Agenda Item Details view shows as current date and time when item is locked

When an agenda item does not belong to a particular meeting (i.e., the meeting date is blank on the Agenda Item Details page), and the item is locked, the meeting date now correctly displays as "None Selected."

In Internet Explorer 10, adding a numbered section to a Meeting Type freezes the screen

We've made a fix for IE10 users on the Meeting Type page in Admin. When adding a section to an existing meeting type, the mouse button can again scroll the page, and clicking on the **trash can** icon removes the section.

CANCEL button incorrectly renders changes on agenda item attachments

When you're editing an existing attachment on an existing agenda item, specifically changing the file name and/or the attachment privacy, clicking **CANCEL** now correctly undoes the changes on the screen.

Clicking SAVE after deleting/editing an agenda section momentarily re-renders the section

Clicking **Save** after editing an agenda item belonging to multiple sections of an agenda again works properly. After removing the item from one or more sections, those sections no longer momentarily reappear in the**Agenda Sections** field.

Meeting date calendar issue

If a meeting is scheduled for the 31st of Jan, Mar, May, Aug, Oct, or Dec and the meeting is edited and rescheduled to a later date, it no longer bumps the date by an additional month.

What's New in Peak Agenda Management, March 4, 2016

New Features

Navigation Improvements for Peak Agenda Items

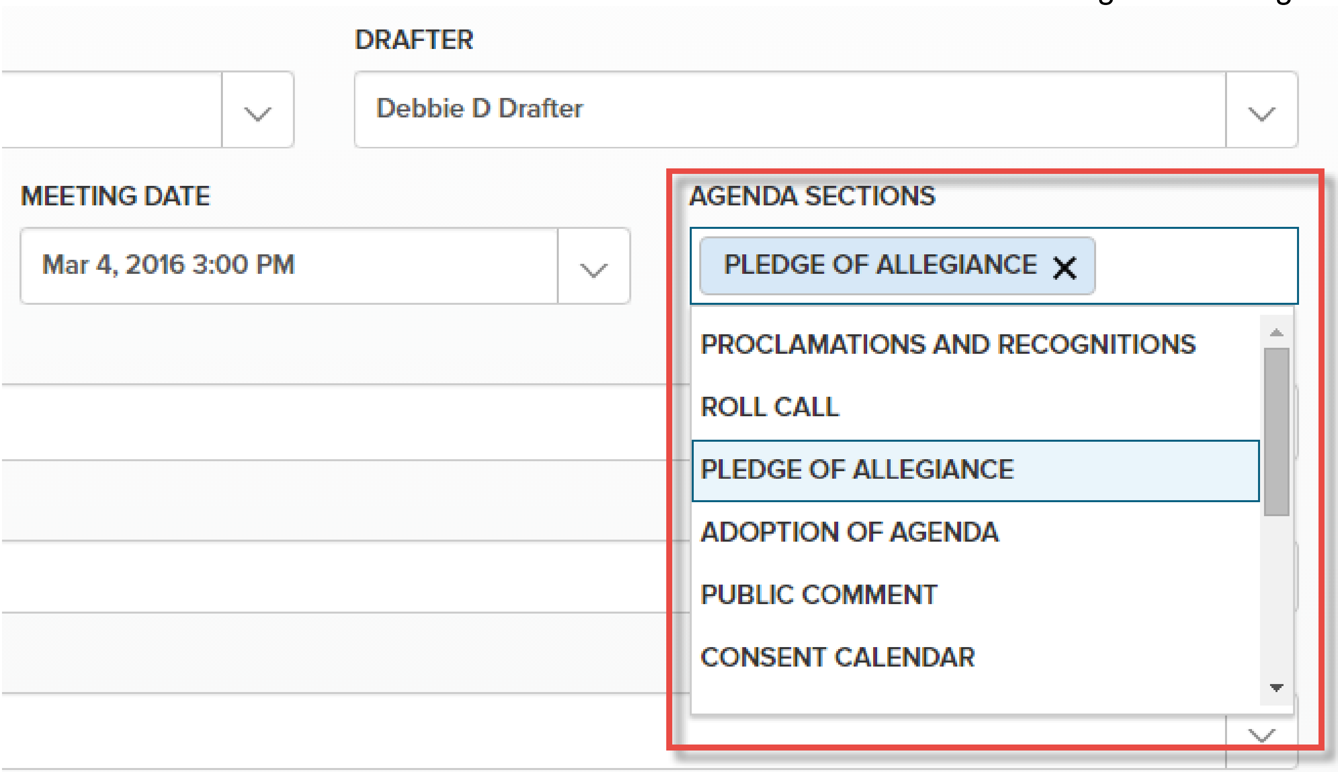
We've made some user-friendly changes to the navigation for working with Agenda Item Details. The idea is that while you're editing your agenda item, you'll always stay on the Item Details page and not be redirected to another page (before, you'd land on the ITEMS page after making changes). You'll navigate where you want to go when you wish to do so (e.g., use the **View Agenda** button to get back to the agenda or the **Items** tab to get to the items page).

1. If you select **Edit** on an agenda item from the Agenda page or the Items list page, when you select **Cancel** or**Save**, you'll remain on the same Item Details page and your changes will be undone or saved, respectively.

2. If you're creating a new agenda item and select **Cancel**, the application returns you to the Items list view. If you select **Create**, the application saves the new agenda item (provided all required fields are complete and valid) and takes you to the Edit mode for the newly created item. If you select **Set up approvals** check box before clicking **Create**, you'll be taken to the **Set up Approvals** page (in this case there is no change).

Agenda Items Can Now Appear on Multiple Agenda Sections in Peak

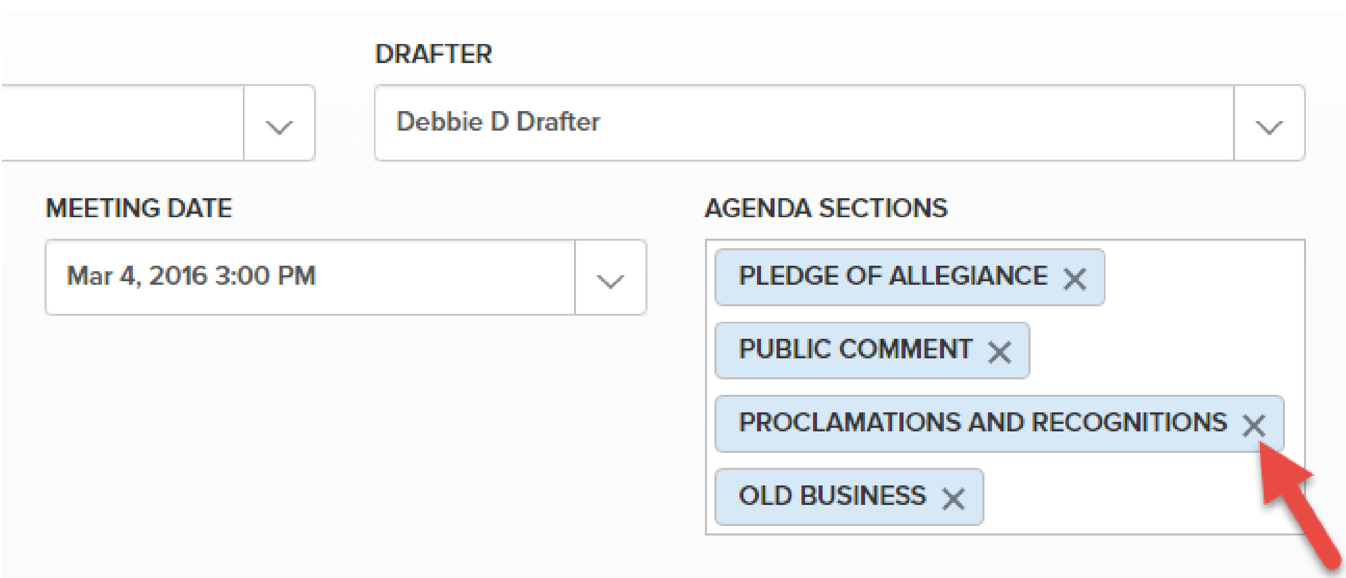
This new feature enables the Admin, Agenda Coordinator, or Drafter (of their own item) to select one or more agenda sections under which the item will be listed on an agenda. Click within the **AGENDA SECTIONS** field to see a menu of available sections, then click on a desired section. Click within the field again to choose an additional section.



This option is available on both the **Create New** > **Agenda Item** page and the **Add Item** option accessed via the left menu of an agenda's details.

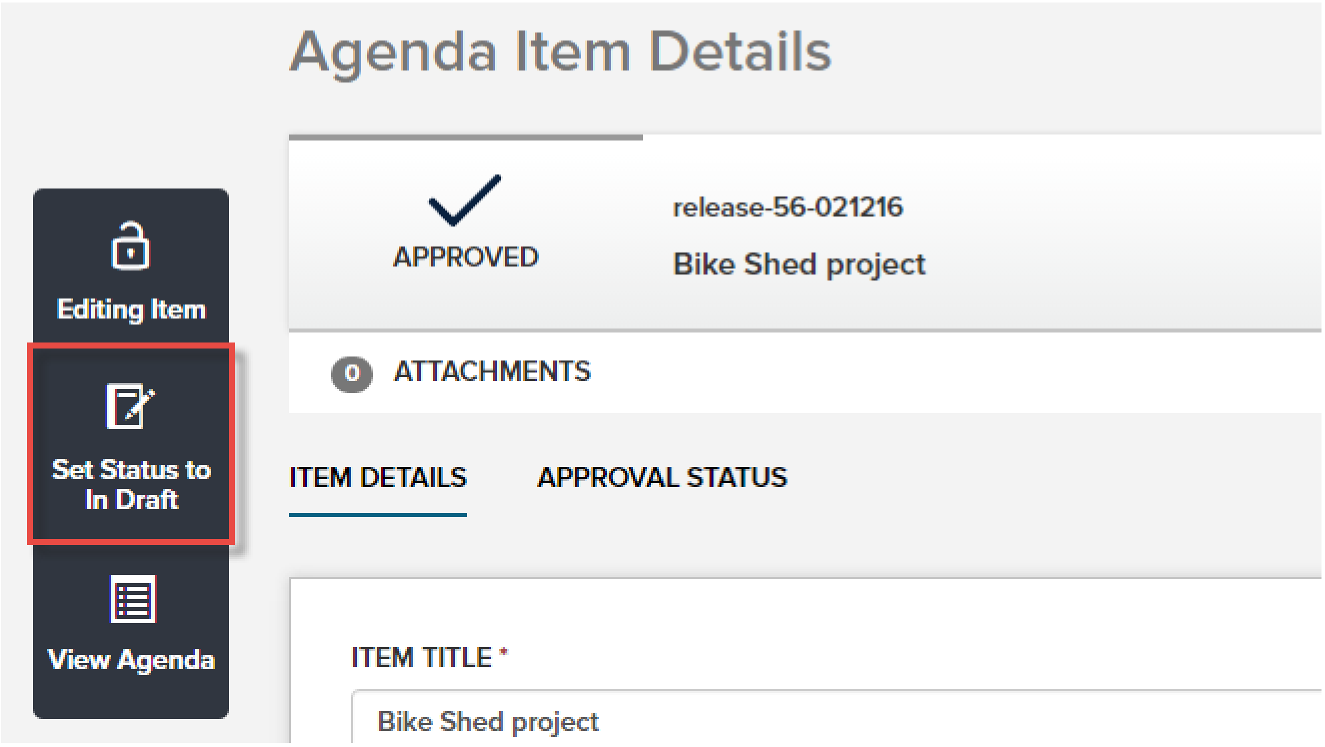
If you edit the agenda item (e.g., change to title, agenda date, attachments) and the item is listed under more than one section, the change will apply to all instances of the item. This means that if the agenda date is changed, the item is removed from all sections. If the title is changed, the title updates in all instances of the item under the different sections.

An agenda item can be removed from one, some, or all sections of an agenda by Agenda Details or via the **Item Details** tab on the agenda item by clicking the **x** next to the section's name.



New Set To Approved/Set To Draft button for Agenda Items in Peak

There's a new **Set to Approved/Set to Draft** button on the Agenda Item Details page when editing an agenda item. This button appears only if the item is unlocked. If the agenda item is **In Draft**, the button will read **Set to Approved**. If the agenda item is **Approved**, the button will read **Set Status to In Draft:**



The purpose of these buttons is for Admins, Agenda Coordinators, and Drafters (when it's their item) to be able to set an agenda item immediately to **Approved** without undergoing an approval workflow. It also allows these same roles (Drafter can take this action for their item only if an Admin or Agenda Coordinator unlocks the item first) to move an item's status back to **In Draft** if further changes are needed. Read more details in the full release note.

Items page: new Meeting Date filter

This capability enables you to filter agenda items based on a specific meeting date. Selecting a meeting date prompts the system to show only those items scheduled for the specified meeting date.

You'll select a meeting body, which will then populate the **Meeting Date** drop-down menu with meetings for that body only. If no meeting body is selected, the selected meeting date populates the menu with meeting dates for all bodies. Meeting dates populate in the drop-down menu regardless of whether they have agenda items attached to them; selecting a meeting without agenda items will return no items in the search.

Default Meeting Location field is now multi-line and has an increased character limit

The Default Meeting Location field on the Meeting Body form in **Admin** > **Bodies** > **Meeting Bodies** now allows for multiple lines of text for a total of 1000 characters. There is also an increased size for the **Default Meeting Location** field on the Create/Edit Meetings form (also 1000 characters). When an agenda is downloaded/published for a particular meeting, the agenda report will support the increased length of the meeting location description.

An item can now be placed under multiple sections of the same meeting agenda

This feature enables the Admin, Agenda Coordinator, or Drafter (of their own item) to select one or more agenda sections under which the item will be listed on an agenda. Click within the **AGENDA SECTIONS** field to see a menu of available sections, then click on a desired section. Click within the field again to choose an additional section.

This option is available on both the **Create New** > **Agenda Item** page and the **Add Item** option accessed via the left menu of an agenda's details.

If you edit the agenda item (e.g., change to title, agenda date, attachments) and the item is listed under more than one section, the change will apply to all instances of the item. This means that if the agenda date is changed, the item is removed from all sections. If the title is changed, the title updates in all instances of the item under the different sections.

An agenda item can be removed from one, some, or all sections of an agenda by Agenda Details or via the**Item Details** tab on the agenda item by clicking the **x** next to the section's name.

Bug Fixes

Adding an approver to phase does not immediately render

When you edit a workflow in Admin and add an approver to a workflow phase, the approver avatar now displays immediately after you click the **Add** button rather than requiring you to refresh or save the phase.

Deleting a user from the platform changes the name of the corresponding approver to "Unable list"

When a user who is in a workflow template in Admin or in a workflow on an agenda item is deleted from the platform, the user's avatar will no longer appear in the phase. When the phase is next edited, an avatar called "User Deleted" will display in place of the deleted user's avatar. You should delete these entries from the workflow template in **Admin** > **Agenda Items** > **Manage Approvals** to avoid seeing them on workflows using this template going forward. In a future enhancement, these avatars will be automatically deleted so that an Admin will not have to manually delete them.

Clicking A NEW WORKFLOW does not always cause the phase creator to display

The phase creator now always displays when you click **A NEW WORKFLOW** to build a workflow from scratch on the Agenda Item Details view. There were some cases (particularly when creating a new agenda item and using the **Set Up Approvals** check box) in which clicking this button would not display the phase creator.

Existing workflows are not always loading on the Approval Status page

On the Agenda Item Details view, the list of available approval workflow templates now always displays. There were previously some instances (particularly when creating a new agenda item and using the **Set Up Approvals** check box) in which the existing workflows would not load.

Removing workflow template to start over is not working after refreshing screen

You can now select an existing workflow template or create a new workflow on the fly in the following scenario: Chose a workflow template, use the workflow, refresh the screen (as if you had navigated elsewhere in the application or logged out for the day), then decide to discard this template by choosing Remove Template. At this point, you can select an existing workflow template or construct another workflow on the fly.

The Search field on the Add an Agenda Item page is not clearing between uses

Prior to this fix, if you used the **Add Item** button on an agenda, then used the **Search items** field on the**Add an Agenda Item** page, your original search results would be retained for subsequent additions of agenda items, even though the **Search items** field appeared to be blank. You'll now have unfiltered search results each time the **Add Item** option is chosen from the left menu on an agenda.

People's avatars are not loading on Approval Workflows or in Agenda Item Approval status

The image file stored in a person record now displays as the avatar on approval workflows on agenda items, approval workflows in Admin, and on an item's comment pane. People's pictures also still appear on their dashboards when they log in. If a person record does not have a picture, a standard colored avatar is displayed.

Editing approval workflow not working correctly in Admin

When a phase was edited and an approver removed via **Admin** > **Agenda Items** > **Manage Approvals**, upon saving, the phase redisplayed with the change but without the ability to continue editing. We've fixed the issue, and editing works as it should.

Editing an agenda item with a radio button custom field set to No gives an error message

If a custom radio button field is set to **No** on an agenda item, an update to that agenda item will no longer flag the radio button field as unpopulated.

Cannot create or edit an agenda item with a custom radio button field (Internet Explorer)

Agenda items using custom radio button fields can now be created and updated while using Internet Explorer. Before this fix, one of three things would happen upon the attempt: 1) fields would not select, 2) values would blank out when fields would lose focus, or 3) changes to fields would not be present upon subsequent review.

Deleting the last phase of an approval workflow leaves you with an un-editable phase

Upon deleting the final phase of a workflow, the phase creator would display, but the **pencil**, **move**, and**trash can** icons would be grayed out. You'd then be forced to click **REMOVE TEMPLATE** to start over. This has been fixed; the phase creator is available after you delete the final phase of a workflow created on the fly or from a template.

Internet Explorer 10 does not truncate long Item Title fields on Agenda Item cards

Long agenda item titles are now truncated correctly wherever the agenda item cards are displayed (Agenda, Items, and Item Details view).

Users with photographic avatars are offset on workflows in Internet Explorer 10 and 11

Approvers with photos are now properly aligned with approvers using the colored avatar. This applies to approval workflows in Admin and workflows on agenda items.

Navigation freezes upon attempt to return to ITEMS page after removing an agenda item

After adding and removing an agenda item from an agenda, you could not go directly to the ITEMS page; the system would require a screen refresh. Now you can go to the ITEMS page after taking these actions without any issue.

If a new agenda item attachment is renamed before the item is saved, the attachment does not retain its new name

While editing an agenda item, if you attach a file to the agenda item and then rename the file before saving the agenda item, once you save the change the new attachment name displays correctly on the agenda item card.

System does not allow creation of one-time or recurring meetings after examination of meeting details

After examining the meeting details from the agenda page, you can now create new one-time and recurring meetings.

Renamed attachment displays on the progress spinner when uploading files to an agenda item

When you're creating or editing an agenda item and you add and then rename and attachment before saving, the new file name will show in the progress spinner as the file is uploaded to the system.

Canceling out of the Add an Agenda Item page does not clear information between uses

Prior to this fix, if you selected an item to add to an agenda and selected the section(s) you wanted it on but then canceled out of the Add an Agenda Item page, the information was retained. When you returned to the page to add an item, the display indicated that data had been cleared, but it was not. Now, the data from the previous transaction is cleared, and you can start with a clean slate to add a new or existing item to the agenda.

Locked version of agenda item should honor carriage returns and white space for Item Title, Suggested Action, and custom Text Area fields

Carriage returns in the **Item Title**, **Suggested Action**, and custom field text areas for an agenda item in the locked version of the agenda item are honored. The locked version of the item looks very similar to the unlocked version with the exception that white space (e.g., a paragraph indent) is honored in an unlocked item but not honored in a locked item. This locked version can give an indication of what the unformatted value of these fields will look like on an agenda report/packet.

Drafters should not be able to lock/unlock a Final agenda nor add sections and items when unlocked

This fix restores the pre-2/12/16 functionality of blocking a Drafter from performing operations on an agenda that is marked as Final. These actions include locking and unlocking the agenda and adding items or sections from the agenda page. The Drafter can still rearrange and delete sections on a finalized agenda, so it is up to the Agenda Coordinator or Admin to lock an agenda once it is finalized.

System messages now display at the bottom of the page

As part of an improved user interface, and with agenda item **SAVE** and **CANCEL** leaving the user on the Item Details page, system messages (errors and confirmations) now display at the bottom of the form.

Editing a platform meeting without meeting body/type results in infinite spinner

When you click **SAVE** on meeting details of a platform-created meeting without populating any details of the meeting (meeting body or meeting type), you'll no longer get an infinite spinner. You can populate the meeting body and type from the Details form, but we recommend accomplishing this from the Agenda view instead. The Agenda view gives you the option of selecting/reselecting meeting body and type before saving, whereas the meeting details form in this case does not.

Locked and unlocked states of an agenda item do not reflect the same order of custom fields

The locked mode of an agenda item now shows the custom fields in the same order as the unlocked mode.

What's New in Peak Agenda Management, February 12, 2016

New Features

Manage Approvals Page Added to Peak Admin

In Peak Admin, there is a new **Manage Approvals** section that enables Admins to delete existing workflow templates that are no longer needed, build new templates from scratch, and edit templates that are still used but need changes applied. Deleting a template will remove it from the **An Existing Workflow** drop-down menu in the Approval Status section of an agenda item. Templates created from scratch will be added to the **An Existing Workflow** menu. When editing an existing template, the name, description, phases, and approvers can be changed, added, and deleted. Neither deleting nor editing a template will affect any historical data, i.e., it will not affect the workflow for current or past agenda items using a workflow that has since changed or been eliminated. The changes are available for use on subsequent approval workflows, but in-process workflows will remain the same unless stopped and assigned a new workflow.

Ability to delete a workflow template

Users with the Peak Admin role can now delete existing workflow templates from the **Admin** > **Manage Approvals** form. Once deleted, a workflow template will no longer appear in the **An Existing Workflow** drop-down menu under the **Approval Status** link on agenda items. Deleting a workflow template in Admin does not affect any historical data (it will not change current or past workflows on agenda items using an instance of the workflow template); it only removes the template from those available for use going forward. If the Peak drafter (their item), Agenda Coordinator, or Admin wishes to restart a workflow that is using a now-deleted template, they will need to choose a different template or build one from scratch.

Ability to edit a workflow template

Users with the Peak Admin role can now add a new workflow template as well as edit existing workflow templates via the **Admin** > **Manage Approvals** form. Existing templates consist of those saved on the Approval Status form for an agenda item as well as those created in Admin. Admins may edit the following: name, description, phases, and approvers. Editing a workflow template does not affect any historical data nor any agenda items currently using the workflow template; it only updates the workflow template in Admin, and those changes are available for use on subsequent approval workflows.

System messaging for Manage Approval Workflows page

Before the workflow has been initialized in the **Approval Status** form of an agenda item, you'll be prompted as follows when you select **Remove Template**:

Do you wish to remove this template from this agenda item and start over with a different template?

- If you select **Yes**, you'll have the option of using the same template, choosing a new template, or creating one on the fly.

If a workflow has been initialized and you choose to **Restart Workflow**, you'll be prompted as follows:

Do you wish to restart the workflow for this item? All approvers will have to review and approve the item again in order for the item to be approved.

- If you select **Yes**, you'll have the option of using the same template, choosing a new template, or creating a workflow on the fly and then initializing it.

Increase character limit of Item Title and Suggested Action fields to 5000

We've changed the character limit for the **Item Title** and **Suggested Action** fields on the **Agenda Item Details** form from 2,000 to 5,000 characters. Character counters now display below each field to indicate the number of remaining available characters. A portion of the **Item Title** is displayed on the agenda item card. On the platform and in iLegislate, all characters display on agenda items. Agenda reports for the **Item Title** also display all characters.

Multi-line custom field for Agenda Item Template

Peak Admins can now add to the Item Template a custom multi-line text field that supports up to 5000 characters.

Bug Fixes

Universal File Converter—Chinese characters showing in bookmark name

We've improved the special character handling in agenda packet bookmarks.

Universal File Converter is not working with files that have capital letters in the file extension

Prior to this fix, if you attached any text files (.TXT, .RTF) or Microsoft Office documents (.DOC, .DOCX, .PPT, .PPTX, .XLS, .XLSX) with uppercase letters in the file extension, they wouldn't be converted to .pdf files and would instead remain in their original format on agendas. In addition, since these files were not being converted, they would not be included in agenda packets. These files would also remain in their original format when published to iLegislate and the Granicus Platform. All of these files types are now properly converted to .pdf and are included in agenda packets.

.PDF files not included in Universal File Converter collation of agenda packets

You can now attach .PDF files (with uppercase letters in the file extension) to an agenda item, and these files will properly collate at the end of an agenda packet when generated.

Admin link showing for non-Admins

The **Admin** link on the top navigation bar is now visible only to those who have the permissions to use it (i.e., Peak Admins and Platform Administrators).

What's New in Peak Agenda Management, January 15, 2016

Bug Fixes

Long meeting body name overruns borders of agenda item card

Longer meeting body names (and the meeting date) now display correctly on agenda item cards. This applies to the Items and Item Details pages.

The last letter of "PUBLISH" and "DOWNLOAD" drops to the next line in agenda details popover windows (Safari users)

We've adjusted the font for the popover windows in the left menu on Agenda Details view. The words "PUBLISH" and "DOWNLOAD" now display properly without wrapping to the next line.

Agenda report: space between agenda item numbering and agenda item title needed

We've added some spacing between the numbering and title of agenda items on the default agenda template. This will also affect customized templates implemented by the deployment team.

Peak supports .tif files as agenda item attachments, but a corresponding image icon is not displayed

Image icons appear next to agenda item attachments to help you quickly identify the file type. There is now an image icon for a .tif or .tiff file attached to an agenda item. Additionally, the corresponding icon displays next to extensions for any valid file types created in all caps (e.g., .TIFF).

Extraneous Spacing on Agenda Report

We've eliminated unnecessary spacing on the default agenda report (for example, when an agenda section does not have agenda items). This fix is backward compatible with any customized agenda report templates the deployment team may create for a Peak customer.

Numbered agenda items do not display as numbered in Media Manager or iLegislate

Numbering is now preserved on sections and agenda items when agendas are published to the platform and iLegislate. In the platform, specifically, the numbering becomes part of the agenda sections and items as text. If you use the platform to add additional sections or agenda items, you'll need to include the numbering as part of the text of the agenda section or item name. If additional changes to the agenda are needed after publishing, it's recommended they are made in Peak and the agenda republished to iLegislate.

Peak Calendar not displaying properly

- **SalesForce Case** #237572

We've restored the Calendar display by updating code to use a previous version of third-party software utilized by Peak. The software was causing an incompatibility with the calendar.

UFC — PDF collation failure on agenda packets

We've improved attachment handling for Peak agenda packets.

What's New in Peak Agenda Management, December 4, 2015

New Features

Page Numbers and Bookmarks for Peak Agenda Reports

For this release, we are excited to introduce enhancements to the PDF agenda/agenda packet creation process. Page numbers will be added as a PDF is created, starting at 1 on the first page and running consecutively throughout the document. In the agenda packet creation process, multiple PDFs are combined for the agenda and its associated attachments, and bookmarks will allow you to jump to different sections within the packet to view these attachments. Both page numbers and bookmarks will be added by default as agenda packets are created.

Save and Cancel buttons made "sticky" on Peak forms

Save and **Cancel** buttons now remain in their own panel in the bottom right, and remain on the screen while the form is scrolled.

The following forms are affected:

- Create/Edit Meeting Bodies
- Create/Edit Department
- Create/Edit Person
- Create/Edit Meeting Type
- Manage Agenda Item IDs
- Site Information
- Create/Edit Meeting

Ability To Create Public Agenda Packet

This feature enables an Administrator or Agenda Coordinator to generate an Agenda Packet for the public. The public packet contains the agenda report: standard header, sections, agenda items, and a hyperlink for each attachment (excluding attachments marked as hidden). To create the public agenda packet, click **Download** from the toolbar on the left of an Agenda, select **Agenda Packet**, select **For Public**, and click **Generate Packet**. A time stamp is updated when the packet is generated/regenerated. Once the packet generation is completed, the text on the popover is updated. Click **Download** to download the agenda packet.

Microsoft Office, .rtf, and .txt files are converted to PDF and appended to the agenda packet in their expanded form. Other file types, while allowed as attachments, are not appended to the agenda packet and are accessible only as hyperlinks.

Attachments marked as *Not on the agenda* (hidden) are not included in the agenda report at the beginning of the packet. These hidden attachments are also excluded from the agenda packet in their expanded PDF form.

Additionally as part of this capability, the Agenda Only report removes confidential attachments from the report under their respective agenda items.

Ability to Create Council Member Agenda Packet

This feature enables an Administrator or Agenda Coordinator to generate an Agenda Packet for council members. The Council Member packet contains the agenda report: standard header, sections, agenda items, and a hyperlink for each attachment (excluding attachments marked as hidden). To create the Council Member packet, click **Download** from the toolbar on the left of an Agenda, select **Agenda Packet**, select **For Public**, and click **Generate Packet**. A time stamp is updated when the packet is generated/regenerated. Once the packet generation is completed, the text on the popover is updated. Click **Download** to download the agenda packet.

Note: the Agenda packet will currently open in the same window, at which point you may download the packet to your computer. Use the browser's back button to return to the Peak application.

Microsoft Office, .rtf, and .txt files are converted to PDF and appended to the agenda packet in their expanded form. Other file types, while allowed as attachments, are not appended to the agenda packet and are accessible only as hyperlinks.

Attachments marked as *Not on the agenda* (hidden) are not included in the agenda report at the beginning of the packet. These hidden attachments are also excluded from the agenda packet in their expanded PDF form.

Additionally as part of this capability, the Agenda Only report removes confidential attachments from the report under their respective agenda items.

This will be the same agenda that is seen when the agenda is published to the platform and viewed at the platform (**View Agenda**). It will also be the same agenda report that will be seen on a jurisdiction's view page. When the agenda is viewed in the platform by looking at the event and clicking on the **Agenda** tab or when examined in iLegislate, confidential attachments are shown.

Help chat button moved inside Peak's primary navigation bar

The **Help** button has been moved from the lower right corner of the Peak application to inside the top navigation bar to the right of the **Admin** link. This prevents the button from obscuring any existing **Save** and **Cancel** buttons on the application's forms.

What's New in Peak Agenda Management, November 13, 2015

New Feature

In-app User Guide for Peak Agenda Management

We are excited to announce a new user assistance feature for Peak Agenda Management. The **Guide Me** in-app help feature is now found throughout Peak. This guide gives a concise, step-by-step tutorial on key features and functionality of each page without requiring you to leave Peak. Activate the guide by clicking the **Guide Me** link found at the top right corner of the following pages:

- Meetings
- Items
- Manage Departments
- Meeting Bodies
- Manage People
- Assign Group Roles
- Manage Meeting Statuses
- Manage Meeting Types/Create and Edit Meeting Type
- Manage Item Template

What's New in Peak Agenda Management, October 23, 2015

New Features

or the 10.23.15 release of Peak, several new features have been implemented. See **What's New in Peak Agenda Management** below for more detailed information on these features.

- A tablet screen resolution (1366 x 768) is now supported.
- User and Person records in Peak can be associated with each other. This is useful for jurisdictions that have existing Users from the platform; associating these Users with People records will allow for greater functionality in the application.
- Agenda publishing is now operational. You can publish to MediaManager (via iLegislate) and to the web.
- Archive folders from the platform can be assigned to a Peak meeting type. You'll be able to see the folder at the platform level when reviewing the corresponding event.
- Multiple attachments can be added to an agenda item simultaneously via a single **Browse Your Computer** operation.
- Users assigned a None role can now view the Items page. This allows for FYI-only users as well as approvers to view items in current or completed approval workflow phases.
- Two new options to filter agenda items are also available on the Items page: FYI Only and Previously Approved.

Universal File Converter for PDF Generation in Peak

The Universal File Converter (UFC) is a document conversion service used to support PDF generation in Peak. This service will integrate with the application to take documents in any standard Microsoft Office format and convert the document to a high-quality PDF. This feature is relevant to agenda item attachments and is essential for creating agenda packets in Peak. We are introducing the UFC for Peak, and it will eventually be integrated with our other products as well.

Agenda Downloads via Document Generation Service

The Document Generation Service is a centralized Word-reporting service for Peak that allows an Admin or Agenda Coordinator to create and download an agenda report based on a user-defined template. The service takes data from the application via the template and creates a Word document or PDF. The report can then be printed, published, or posted to the web as needed. This Word reporting platform is initially being rolled out for Peak; it will eventually be available with our other products as well. Report generation is accomplished by navigating to the **Agenda** view, clicking on the **Download** menu option, and selecting the file type of your choosing: Word or PDF.

Tablet Screen Resolution (1366 x 768) is Now Supported

Larger screen resolutions are recommended for maximum usability. See the Peak Technical Solutions Guide for more information on recommended resolutions.

Existing Users can be Combined with Person Records

A Platform Administrator can now assign an existing Peak User to a Person record via **Admin** > **People** > **Manage People.** This function is useful for jurisdictions that have existing Users created at the platform level. Creating a Person record for each User in Peak allows for greater functionality in the program, e.g., the avatar from the Person record displays with the corresponding User in approval workflows and on the dashboard. This feature also allows an Administrator to tie an existing User to an existing Person record; this is useful when the Person is used on other forms in Peak, e.g., as a contact person for meeting bodies and departments.

Publishing Agendas in Peak

An Admin or Agenda Coordinator can publish a Peak agenda to MediaManager. There are two options: publish to iLegislate and publish to the web. Select one or both, then click Publish. Microsoft documents are converted to .pdf when viewed in MediaManager. Both the meeting information and the agenda with its items and attachments publish to MediaManager. Agenda items retain agenda order and attachment order when published.

- When published to iLegislate, the agenda can be viewed along with the corresponding event on the Granicus Platform (MediaManager). You can examine agenda sections, items, and attachments via the Agenda tab. This option also publishes the agenda to iLegislate so that a user with a Peak log-in and password can access the agenda there.
- Publishing to the web gives you all the functionality described above, and you can also select a view for the agenda from the drop-down menu. The menu is populated with viewpages from the platform. From the viewpage you selected when publishing, you'll be able to view the agenda as a .pdf.

Assigning Archive Folders to Meeting Types

Peak Admins can now assign an archive folder to a meeting type. This is a required field for any new meeting type created, and the folders are displayed in a drop-down menu populated from the platform. Once an archive folder is assigned to a new meeting type or updated on a meeting type, only future instances of meetings of that type are updated when changes are made to the archive folder. You'll be able to see the folder at the platform level when reviewing the corresponding event, and the folder may be changed for an individual meeting at the platform level as well. When a meeting is created in Peak, the archive status will be set to Pending when the event is viewed in the platform. Because it depends upon interaction with the platform, this option is not available to Peak-only clients.

Additional Filter Options Added to Agenda Items Page

Users assigned a None role can now view the Items page; this allows for FYI-only users as well as approvers to view items in current or completed workflow phases. Two new options to filter agenda items are also available on this page: **FYI Only** and **Previously Approved**.

- Agenda items the user is assigned to as FYI-only will appear under the **FYI Only** filter once the workflow phase becomes current. Agenda items approved by the user will appear under the **Previously Approved** filter. Agenda items that need the user's approval will be listed under the **Needs My Approval** filter. There is also an **All Items** filter with a sub-filter of **My Items**, which lists items drafted by the user. The **My Items** filter contains three sub-filters: **In Draft**, **In Review**, and **Approved**, with counts for each category.

- Users with a None role will see only the **Needs My Approval**, **FYI Only** and **Previously Approved** filters. The FYI only agenda item will appear under the **FYI Only** filter once the approval workflow phase becomes current. None users can access only those items that need their approval as well as FYI items in a read-only view.

Meetings on Viewpage not Dependent on Archives

Meetings, and their associated agendas, will remain on viewpages indefinitely without the need for an archive (i.e., a recording of the meeting). There is a new field, **Past Meeting Source**, at the Platform level found under **Admin** > **Views**. This field may be set to either **Video Archives** or **Past Events**. If the field is set to **Past Events**, meetings that have occurred will be visible on the viewpage along with a link to the agenda if it's published. The viewpage using the **Past Events** setting will not include links to archived videos because it is assumed this setting is used only for meetings without an archive. The standard label **Archived Videos** will be changed to **Past Meetings** or can be customized within the template.

What's New in Peak Agenda Management, October 2, 2015

With this release we are introducing Peak Agenda Management: the simplest, fastest, most supported, most usable agenda management software in the industry. Peak is designed to help government organizations take control of and simplify their agenda preparation process. This intuitive, browser-based application is beautifully designed to fit the specific needs of municipal clerks and officials, using technology unmatched in the government space. Some of the features contributing to Peak's ease of use are autopopulation of fields, cross-platform support, drag-and-drop editing, sequential or concurrent approval phases, and simple agenda packet creation. Over the coming weeks, we will continue to add enhancements and new features to Peak, including in-app chat support. See a Peak demo and check back for more updates in our next release.

The Universal File Converter (UFC) is a document conversion service used to support PDF generation in Peak. This service will integrate with the application to take documents in any standard Microsoft Office format and convert the document to a high-quality PDF. This feature is relevant to agenda item attachments and is essential for creating agenda packets in Peak. We are introducing the UFC for Peak, and it will eventually be integrated with our other products as well.

The Document Generation Service is a centralized service for Peak that allows an Administrator or Agenda Coordinator to create and download an agenda report based on a user-defined template, which can be printed, published, or posted as needed. The service takes data from the application via the predefined template and creates a Word document or PDF. This Word reporting platform is initially being rolled out for Peak and will eventually be available with our other products as well. Report generation is accomplished by navigating to the Agenda view, clicking on the Download menu option, and selecting the file type of your choosing: Word or PDF.