What's New in Granicus: September 9, 2016

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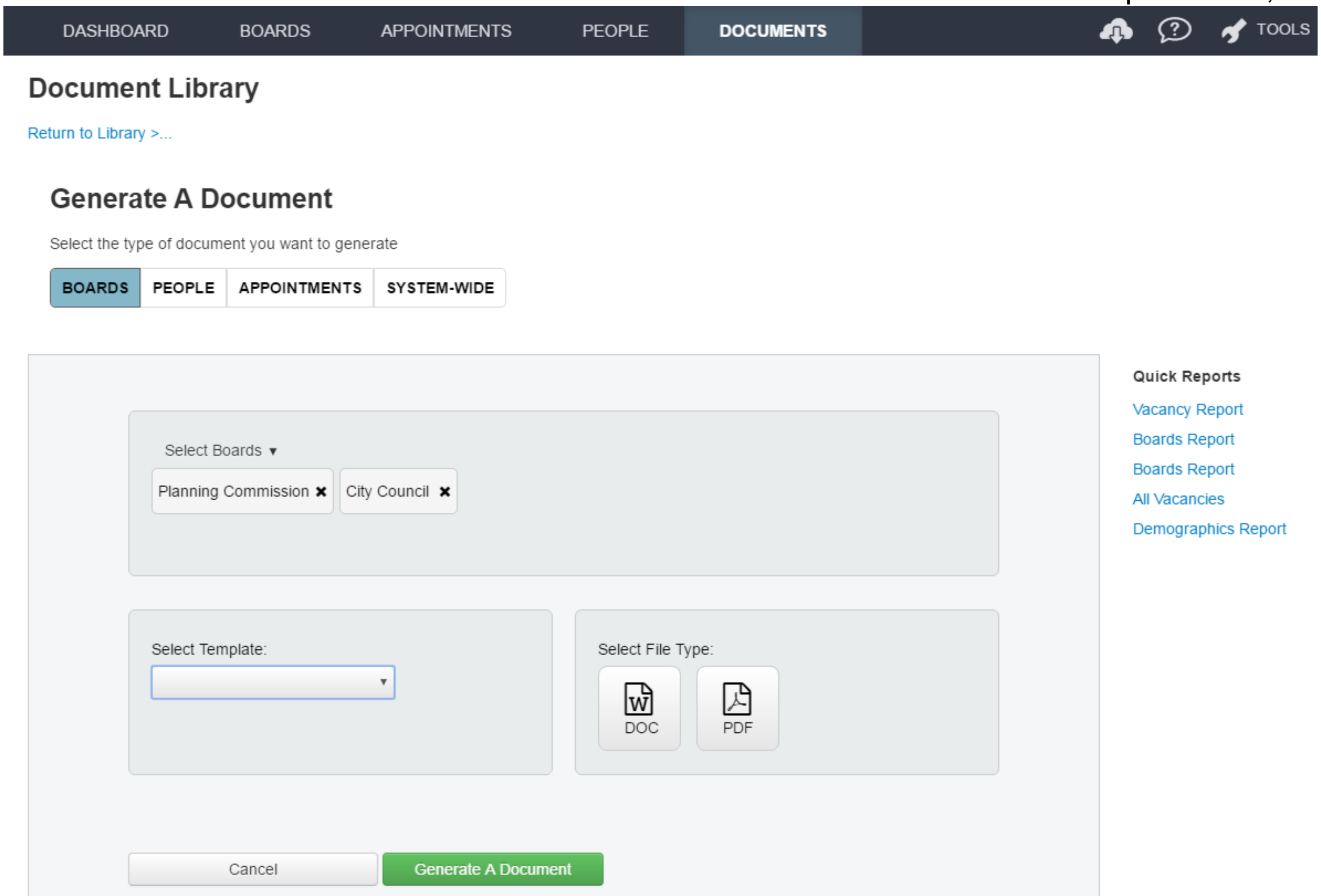
Highlights from this Release

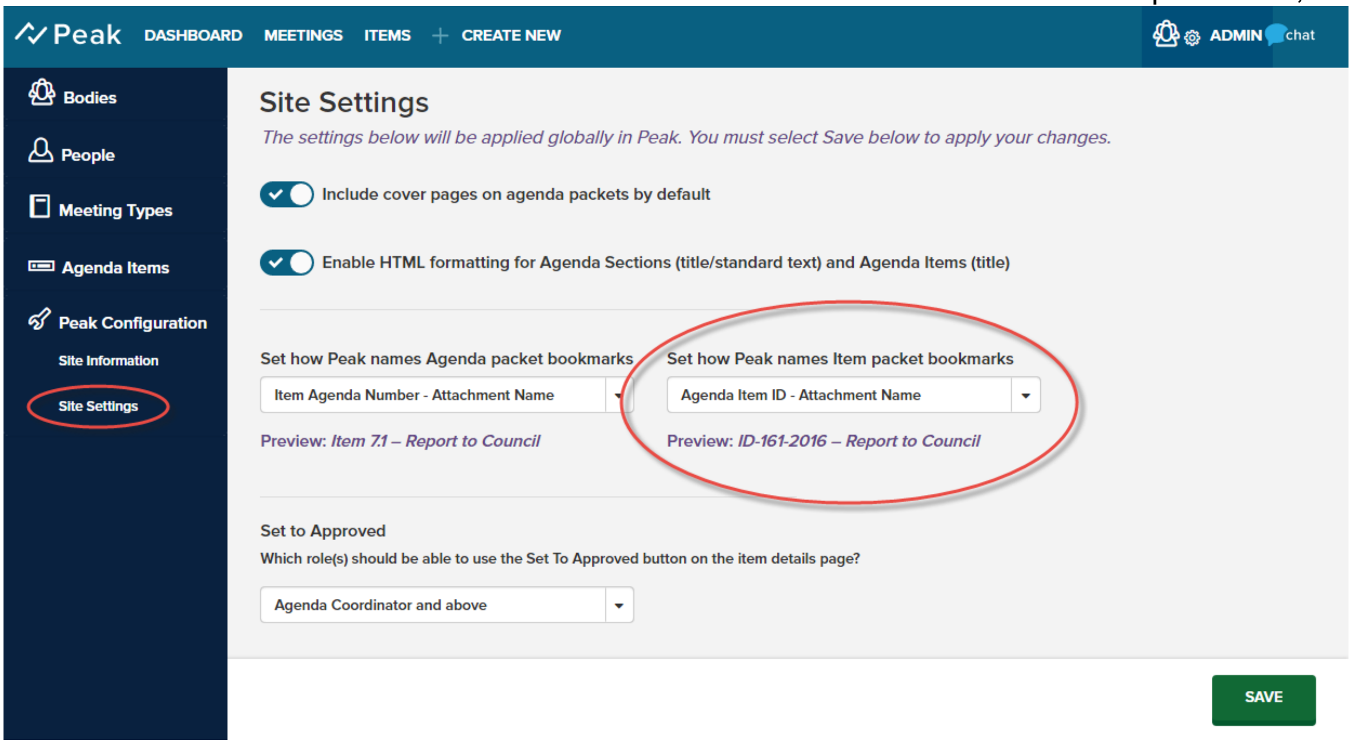
New Custom Report and Document Generation Feature for Boards and Commissions

We've added a custom report and document generation option in Boards and Commissions. This powerful new tool uses templates made to your specifications by our Design Team featuring appointment, board, people, or system-wide data. This new feature can be used to generate reports specific to your jurisdiction's needs as well as personalized documents (welcome letter, oath of office statement, thank you for applying, etc) to applicants or new appointments. A new **Documents** tab in the top menu takes you to the Documents Library, where you can access previously generated documents as well as create new ones. The **Generate a Document** button opens a form that enables you to generate custom reports and documents. You'll be able to select the type of data to be used in the report or document, then select a template from among those uploaded to your site by our Design Team. You can generate the report in either DOC or PDF format. The Documents Library will display a table of generated reports with the template name, the data from which the report was generated, the format, the status, and the date created. As of this release, all clients will have access to the existing Boards and Vacancies reports which will be moved to this new Documents tab. Contact your client executive if you're interested in purchasing custom document or report templates.



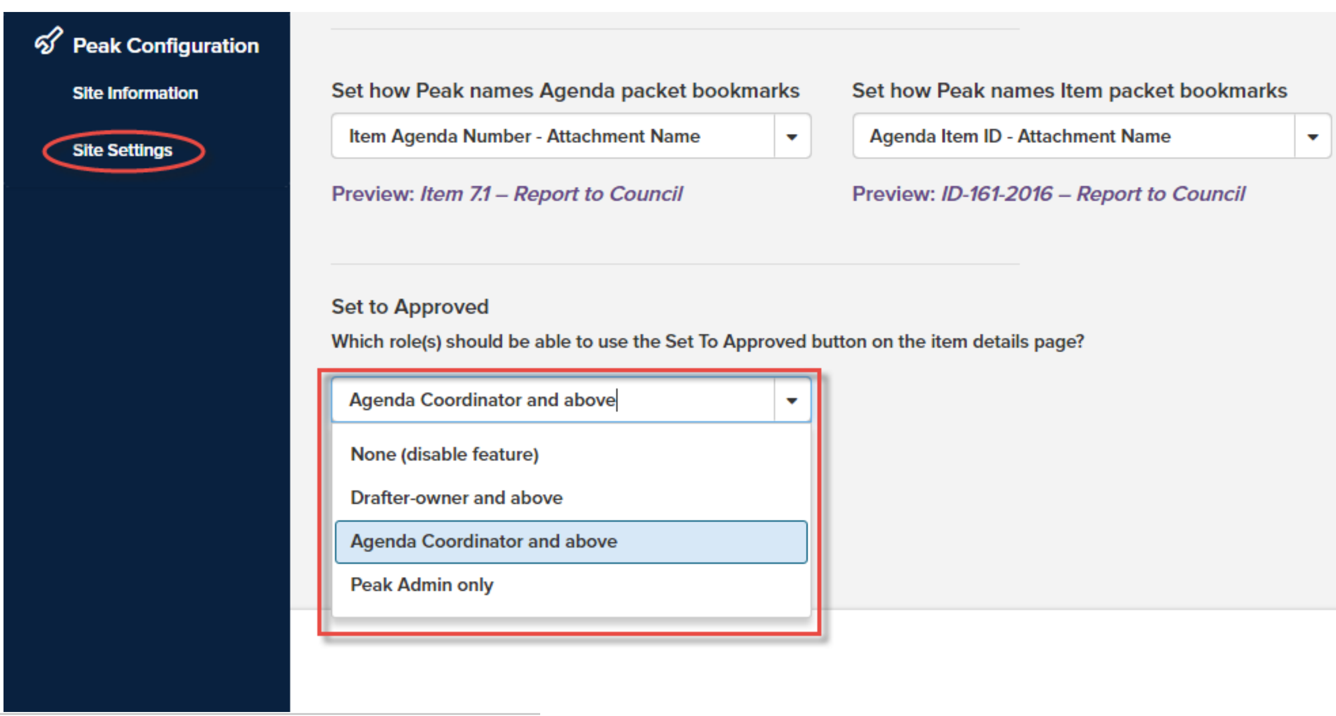
Item Packet Bookmark Naming in Peak

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.

Hosted Updates

Hosted services are automatically updated on the night of the release (September 9). You do not need to perform any specific actions to receive these updates.

What's New in Boards and Commissions

New Features

Existing reports have moved to the new Documents page

We have moved the existing system-wide reports (Vacancies Report, Boards Report, Master Roster, All Vacancies, Demographics Report) to the new Documents page. Clicking the **download cloud** icon now gives you the link to the new Documents page, as well as the old Reports page.

If you need access to reports you have previously generated, you can click the link to the old Reports page. New reports will no longer be generated here, but the page will remain to provide access to historical reports.

If you want to generate one of the system-wide reports, you can click the Documents page. This will open the Generate A Document page with the **System-Wide** tab selected. On the right, you will see a list of the default system-wide reports, now called "Quick Reports."

Clicking a Quick Report link selects that template type from the **Template** drop-down menu. If you select the Vacancies Report or Board Report, you'll have the option of generating the report as either a PDF or a DOC. The other reports will generate in their default file formats: CSV or XLSX.

When you click the **Generate** button, you'll be redirected to the new Document Library. You will see your report listed in the reports table. While the report is generating, there will be a spinner in the **status** icon. Once the report is generated, the spinner will become a **checkmark** icon, and there will also be a **cloud** icon in the Actions column. Clicking the **cloud** icon will enable you to download the report.

Attach documents to Appointment Application upon generation

When you generate a custom Appointment or Person document from the new Documents page, a link to the generated document is attached to the appointment application. A new section labeled "Custom Documents" is created in the internal tracking section of the application upon generation of a custom document. The generated report is listed as a link under this section. Any additional custom appointment documents generated for the appointment or person will then be listed under this same Custom Document section. This enables you to quickly access documents generated for a specific person or appointment. You won't be able to delete documents from an application. Instead, you must go to the Documents page and delete the generated report from the generated reports table. Deleting the report from the table will also remove it from the appointment or person application.

Attach documents to Board Details upon generation

When you generate a custom Board document from the new Documents page, a new section labeled "Custom Documents" is added to the Board Details page of the board for which the report is generated. A link to the generated report is then listed under the new "Custom Documents" section. Additional reports that are generated for that board will be listed underneath this same section. This allows the user to quickly access documents generated for a specific board.

You will not be able to delete the document from the Board Details page. Instead, you will need to find the generated document in the generated reports table of the Documents page. Deleting the report from the generated report table will remove the report from the board details page.

Appointments Action menu has a single appointment link to Documents page

We've added the option to generate a custom appointment document to the **Action** menu on the Appointment and People pages to make it easier to generate custom documents for individual people or appointments. You can access this function by clicking an individual application from either page. Clicking the application will open the application in the pane on the right. You'll then see an **Actions** drop-down menu. Within this menu there will be an option to *Generate a Custom Report*. Selecting this option will redirect you to the Generate A Document page. The Generate A Document page will have the document type tab (person or appointment) opened with the person or appointment selected in the corresponding drop-down menu. You can then select the template type and file format (PDF or DOC) and generate a document.

Boards Action menu has a link to the Documents page

We've added the option to generate a custom Board document to the **Actions** menu on the Boards page to make it easier to generate custom documents for individual boards. You can access this function by opening a board from the Boards page and clicking on the **Actions** menu. Within this drop-down menu, there is an option to *Generate a Custom Report*. Selecting this option will redirect you to the Generate Document page. The Generate A Document page will have the document board tab opened with the board selected in the Board drop-down menu.

You can then select the template type and file format (PDF or DOC) and generate the document.

Link to Documents page added to Boards Action menu

We've added the option to generate a custom appointment document to the **Action** menu on the Appointment and People pages to make it easier to generate custom documents for individual people or appointments. You can access this function by clicking an individual application from either page. Clicking the application will open the application in the pane on the right. You'll then see an **Actions** drop-down menu. Within this menu there will be an option to *Generate a Custom Report*. Selecting this option will redirect you to the Generate A Document page. The Generate A Document page will have the document type tab (person or appointment) opened with the person or appointment selected in the corresponding drop-down menu. You can then select the template type and file format (PDF or DOC) and generate a document.

Multiple appointment link added to Documents page

if you'd like to create a custom report for multiple appointments, and your jurisdiction has the new custom document and reports feature turned on, you can easily select the appointments from the Appointments page by checking the checkbox next to each person.

Once you've checked all the appointments you'd like to include, select the *Custom Document* option from the **Group Actions** menu. You'll be redirected to the Generate A Document page. The page will have the Appointment tab selected and all the appointments that were checked will be listed here. You'll then need to select the template and file format (PDF or DOC) in order to generate a document.

Bug Fix

Appointments tab filters are not working

We've fixed the filters on the Appointments page; users can once again filter by all the default and custom templates.

What's New in Legistar

NOTE: The maintenance release for Legistar has been delayed. We will be releasing the new version of Legistar on Friday, September 16, between the hours of 9 pm and midnight, PDT.

Bug Fixes

Reminder emails should not include FYIs when sequence is completed

We've corrected an issue in which Legistar was sending reminder emails to FYI individuals on completed ATS sequences. Now only the current approver (with reminder emails turned on) will receive reminder emails for Paused and In Progress ATS sequences.

Users are not receiving ATS reminder emails

SalesForce Case #295955

Legistar will now send reminder emails at the time specified by each jurisdiction in administration. You can find this setting in **Administration** > **System Settings** > **Approval Tracking** > **ATS Automation Time**.

Files not escalating while in ATS review

SalesForce Case #281090

We've corrected this process, and escalations will now take place going forward.

Search is not producing complete results for Final Action date

SalesForce Case #265178

When users searched for files using the **File Created**, **Agenda Date**, or **Final Action** fields, the correct search results would not be returned. Generally, not all files with those dates would be returned in the search.

We've fixed this issue, and all appropriate files are returned when searched using the above dates.

Save not working for ATS notes

SalesForce Case #296638

Legistar was not saving an approver's notes in an ATS sequence unless the user was taking an action on the File, i.e., Approve, Disapprove, or Delegate.

We've fixed this issue, and approvers can now save notes without taking an action on the file if they add the note, pause the sequence, and then restart the sequence.

Hearing date on Details tab disappears when reloading file

SalesForce Case #232739

When a user added a hearing date to an existing file, saved, navigated out of the file, and then navigated back to the file, the hearing date would not save.

We've resolved this issue, and the hearing date now saves and is present even after the user navigates away from the file.

What's New in MediaManager

Bug Fixes

Users cannot log in

SalesForce Case #208194

We've resolved an issue in which switching between Granicus products prevented users from being able to log in.

Minutes Word add-in/Laserfiche issue

SalesForce Case #250351

Users were previously unable to create Minutes using the Word add-in if they also had the Laserfiche add-in installed. We've resolved this issue, and users can now use the Word and Laserfiche add-ins concurrently.

eComments not working with Views built with the View Template Designer

eComments are now available on View Pages built with the View Template Designer.

What's New in Peak Agenda Management

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.

Please note: For the above function to work, you must have an Agenda Packet column enabled on your view page. Contact Granicus Customer Care to make a request.

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 SpeakUp

Bug Fix

Users cannot add attachments to discussions

We've fixed this issue, and users can again upload attachments to their discussions.

On-Premise Updates

Updates to on-premise software become available on the night of the release (September 9) and your system will be updated on a case-by-case basis. Please contact Granicus Customer Care if you need to schedule an update.

What's New in iLegislate

Bug Fixes

Hyperlinks in agenda items not clickable

Hyperlinks found in agenda items can again be selected and opened.

Attachments hyperlink issue in Legistar

SalesForce Case #182215

Attachments that included hyperlinks that were inserted in Legistar pointed to the wrong page in iLegislate. We have corrected this issue.

Legislation text error

SalesForce Case #222816

Hyperlinks found in agenda items can again be selected and opened.

What's New in Media Player

Bug Fix

Getting second nested player in media player page

SalesForce Case #297200

We have fixed an issue in which two audio feeds were playing on the same video in some instances, causing an echo. This no longer occurs.