

# What's New in Legistar

This page contains a list of past updates and bug fixes released for Legistar and InSite, going back to April 2013. If a month is not listed, it means that there was no Legistar release that month.

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

## December 2, 2016

### Bug Fixes

#### **Performance: Local Settings takes a long time to launch**

We have significantly reduced the time it takes to launch Local Settings.

#### **Users getting error message upon deletion of approver from original sequence**

When setting up a new approver in ATS, you can no longer move away from the new line until the approver and email template have been selected. This will prevent the errors that occurred when trying to start a sequence or delete lines.

#### **Admin: Error copying a body type's workflow in Work Flow Control**

You can now copy a body type's workflow successfully.

#### **Attempting to pause an already-paused ATS sequence should result in an error message**

If a user pauses a sequence and then another user tries to pause it without refreshing the file in view, Legistar displays the following message: "Cannot pause a sequence that is either already in process or completed." The system then refreshes the view to show the actual status of the file.

#### **"Operation failed with no details found" error message clarified**

We have corrected an error message that appeared intermittently ("Operation failed with no details found") by replacing it with a message specific to what is actually failing in the application.

### **InSite: Text file changes are not applied from InSite ATS**

Users can now make changes to the Word document without submitting an action for files in ATS in InSite.

## **November 4, 2016**

### **Bug Fixes**

#### **Legistar's Approval Tracking System Security Setting Options Restored for Approvers**

By popular request, we have restored your ability to customize approval security settings for individual users in the Approval Tracking System. Approvers can again take actions in ATS as specified by their security settings, whether or not they are requesters or admins.

With the recent upgrade of ATS, we created a new security setting called **Approval Sequence Admin**. This setting, when checked, enabled users in a security group to make changes to approval sequences even if they were not requesters, but their individual security settings did not apply. We've restored the original functionality so that users can be set up to add, edit due days, delete approvers, change sequence order, etc., based entirely upon their individual security settings.

The **Approval Sequence Admin** setting will remain as a feature if you want approvers in your Legistar system to be able to approve files for other people.

#### **Locked files displaying as Edit Record Mode instead of Read Only mode for admin users**

- **SalesForce Case #281138**

The window title now displays as Read Only mode if the file is locked and Edit Record Mode if it is unlocked.

#### **ATS approver status report is showing multiple people as the current approver**

- **SalesForce Case #17133**

The status report displays only the correct approver.

#### **Drafters are able to edit a file while locked after ATS is complete**

- **SalesForce Case #17055**

Once a file has completed ATS and is locked by the system, nothing can be edited for the text file itself, the attachments, or the file's details.

### **Auto-populate for Mover and Seconder does not work in Minutes for Consent Vote**

You can now select a mover and seconder by typing names into the field.

### **Security Settings: users can access areas to which they do not have permissions**

A user with no permission to security areas can no longer access them.

## **October 7, 2016**

### **Bug Fixes**

#### **Login Limit is being enforced on users who do not have the feature turned on**

We have fixed a problem in which the login dialog would freeze and prevent users from logging in to Legistar.

#### **Legistar is making too many server calls ahead of login, causing significant delay**

We have increased performance on Legistar's initial load, removing the significant login delay.

#### **"Matter record accessed in Edit mode" entries removed from security log**

We have removed the security log entry that reads "Matter record accessed in Edit mode." This entry was cluttering the log and did not provide any real information. Legistar will now record only actual changes that are made to the file.

#### **"Registry settings could not be retrieved" error displaying on Legistar launch**

We've corrected a registry settings error that occurred when Legistar was installed for the first time.

#### **Log entry detailing who makes an ATS change is incorrect**

We have corrected the log to display either 1) LegistarSystem if the change was internal; or 2) the person who made the change.

#### **Internal Notes is logged as a change each time file is loaded and the user browses away**

We've corrected an issue that would cause matters with notes to be saved when no changes had been made.

### Reports section in Administration is not available

- **SalesForce Case #296283**

Database fixed in production.

### User able to modify a file after ATS sequence has been started

- **SalesForce Case #280673**

We've fixed this issue, and internal notes no longer trigger a save that would cause the last user to inadvertently make changes to a file.

### Time/Date Format creating error on Legistar launch

- **SalesForce Case #304194**

This issue has been fixed; the error no longer displays upon login.

## September 9, 2016

### 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.

## August 12, 2016

### New Feature

#### New setting to prevent Private Notes from importing from MediaManager

We've added a setting called "Import Private Notes From LiveManager." If set to **Yes**, the system will import private notes; if set to **No**, it will not import private notes. By default, this setting will be **Yes** unless changed. You'll find this setting in **Admin > System Settings > Meeting**.

### Bug Fixes

#### Performance improvements

We've increased performance in multiple areas of Legistar.

### **Approval Complete email is not populating approver name**

#### **SalesForce Case #281078**

The [Approver] email template variable now correctly shows the approver's name, even if the sequence has been completed.

### **A new person record added in Admin > People reflects in the list only after you refresh the view**

#### **SalesForce Case #281203**

Newly added people are now immediately reflected in the list with no need to refresh.

### **Association tab searches not producing accurate results**

#### **SalesForce Case #296799**

We've resolved this issue, and **Association** tab searches (Sponsors, Indexes, Related files) again work as they should.

### **Laserfiche Invalid Index error**

#### **SalesForce Case #284289**

You'll no longer get an "Object reference not set to an instance of an object" error when archiving to the laserfiche server.

### **InSite: Disapproving a file without entering notes results in server error**

Users will again receive the correct error message (rather than a server error) that a note is required to disapprove a file.

### **InSite: Change "Escalation Date" to "Due Date"**

We've updated InSite to show the Due Date for the approver of a legislative file. Also, when you click **View Sequence** for a file in approval, the Due Date and Escalation Date now match what is shown in Legistar.

July 15, 2016

## Bug Fixes

### Issue with spacing on Legistar Text File template (Columbia and Camas)

- **SalesForce Case #238108**

A new setting in **Admin > Legislative files** now controls this issue: "Insert new line on add template to Legistar text file." If set to **Yes**, this behaves as it always did; it adds a new line. If set to **No**, it will not add a new line.

### Clarify error message "Operation failed with no details found" when two people take action on the same file

An unclear error would display if multiple people were taking action on the same file. If an action has been taken on a file since you last refreshed it, you will now get a clearer error message.

### Legistar Admin has duplicate General sections in several databases

We have removed the duplicate General section that could appear in some databases in Admin and Local Settings.

### WCF: Errors when changing file type order in Administration

- **SalesForce Case #280496**

We have fixed the error that would show up when legislative file types were moved in Administration.

### Description field not pulling in the text (NYC)

- **SalesForce Case #279917**

Previously, when adding a file using the **Add Line** function, the description would not pull into the Agenda or Minutes. We've corrected this problem, and the description now correctly pulls into the Agenda and Minutes when adding a file using the **Add Line**, **Copy Selected Line**, and **Add Many Lines** functions.

May 20, 2016

## Insite

## Bug Fixes

### ATS sequence is not completing when using custom actions

- **Salesforce Case #257186**

Custom actions now have the same behavior as in the previous ATS.

### User receiving server error when retrieving Legislative Text and other reports documents

- **Salesforce Case #189876**

We've improved the reliability of the InSite Reports service.

## Legistar

### New Features

#### Option to hide the Confidential checkbox

We have added a setting in Admin under Legislative Files > Details that makes it possible to control how the Confidential checkbox on the Details tab displays. The following options are available: completely hide checkbox, show it as disabled, or show it as active.

### New ATS Features

#### Change the default Action Type from Approver to FYI

In the new ATS, new approver entries will carry the action type of Approver by default. You can change the action type using the **Action Type** drop-down menu in the **Manage Approver** tab. This default can be changed via a new setting in Administration under **System Settings** > **Approval Tracking**.

#### Performance: Optimize RegEx.Replaces, enable compression, improve login and open file performance

Improved performance of new ATS, including logins and opening legislative files, especially for larger clients.

## Bug Fixes

### User should be able to type in information in all Manage Approver text boxes

You can now successfully type information into the **Manage Approver** text boxes.

### Fix tabbing order through text boxes when setting up an Approver

You can now tab through the **Manage Approver** text boxes in logical order.

### **Voting Record report error on large timeframes**

Voting Record report can now be run for longer timeframes.

### **Admins cannot access all sequences in new ATS**

#### **SalesForce Case #255515**

Admins are now allowed to access all saved ATS sequences.

### **ATS sequence Fund Transfer cannot always be accessed from drop-down menu when moving away from file and back**

#### **SalesForce Case #256552**

**April 22, 2106**

## **Legistar**

### **New Features**

#### **Add "Current Approver" on Upcoming Agenda Items report**

The current approver will now show on the upcoming agenda items report.

### **Bug Fixes**

#### **Pending Items drop-down menu in the Approval Tracking tab shows only file number, not description**

- **SalesForce Case #254899**

The File ID and description both now show correctly in the Pending Items list in the Approval Tracking tab.

#### **Referral List Report not displaying accurately when file has multiple referrals on it**

- **SalesForce Case #231920**

Previously, when a file had multiple referrals, each would display in the Referral List Report, regardless of whether or not there was a return date for the History Line Item. This issue has been

fixed, and now any referral with a History Line Item that has a return date will not display in the Referral List Report.

### **Cannot assign file IDs from the Tools menu in Agendas module**

- **SalesForce Case #251321**

We have fixed the ability to assign files to permanent IDs in the agenda module.

### **Get conversion from integer error when adding new member**

- **SalesForce Case #12353**

We've fixed an error that would appear when adding new members in Admin.

### **"Agenda date is required" message pops up too early when changing file type**

- **SalesForce Case #11648**

Upon users changing the file type of a legislative file, a message used to pop up too early, stating that the agenda date is required. This has been fixed, and the message appears only when users attempt to save without this field set.

### **Error when saving after making changes to text file ..Title**

- **SalesForce Case #221708**

## March 25, 2016

## Legistar

### **New Features**

#### **New feature: Add Primary/Secondary indicator to listing of Sponsors in Legistar**

The primary and secondary mark is now also shown on reports if the setting **Show Sponsor Mark** in Reports is checked.

### **Bug Fixes**

#### **Error trying to delete a user from People that already exists - statement conflicted with reference constraint (non-blocker)**

A more user-friendly error message is now given in Admin when a user is trying to delete items that are being used.

### **Copy File: Get object reference error when copying file and editing text file**

- **SalesForce Case #238521**

### **Legistar Errors when clicking Minutes rows containing votes - (DateTime) - Canada Regional Settings**

- **SalesForce Case #250528**

We have fixed an error that occurred when using Canadian Regional settings.

### **XML error results when clearing/searching for anything in Admin (People, User Accounts, Workflow)**

Clearing and searching in Admin no longer returns an XML error, and searches can be performed successfully.

### **All Users lost permissions and cannot use ATS after the update**

- **SalesForce Case #11426**

Due to lack of permission for Add New Approver, users could not use ATS after the update. Add New Sequence does not require any special permissions anymore; the New Approver permission applies only to adding individual approvers.

### **Copy File: Error message received when copying file with hyperlink attachments**

- **SalesForce Case #238271**

It is now possible to copy a file that has hyperlink attachments.

## March 4, 2016

## Legistar

### Bug Fixes

**Typo in email template message: "entires" instead of "entries"**

We've fixed the typo.

### **Users getting several requests for the same item when delegating multiple times in InSite**

When a user attempts to delegate a file that has been delegated via InSite (by clicking the browser's Back button and delegating again), the application checks if that file is assigned to the logged-in user. If it is not, the user receives a message indicating that delegation failed and no update was made to that file.

### **Demographic information is blank — Show Demographics tab in People is visible even when setting is on No**

- **SalesForce Case #213465**

If setting to show demographics is set to **No**, it is not shown on the **People** tab. If setting is set to yes, it is shown.

### **ATS Performance Improvements**

**Refactor Legistar to use the new client services WCF/SOAP rather than .NET remoting**

**January 15, 2016**

## **Insite**

### **WebAPI**

#### **Option added to disable public access to users method**

We've removed public access to the WebAPI Users endpoint. Please contact customer support if you'd like public access enabled for your site.

#### **XML parsing error with invalid character**

The WebAPI no longer returns a parsing error in Matter notes with a particular invalid character.

#### **Public users should not be able to post or delete Matters**

We've fixed a WebAPI authentication issue that allowed inappropriate write access to public users.

### **Public users should not see non-public Matters statuses**

Public users of the API will no longer be able to see Matter statuses and Matter types not marked Public on InSite.

### **POST Matter Attachment reports shows success but is not internally correct**

### **Add maShowOnInternetPage for Matter Attachments with default setting of ON**

maShowOnInternetPage is now set to true by default, and added attachments can be retrieved. If set to false, the attachment will not be accessible.

### **WebAPI Automation working again**

## **Legistar**

### **New Features**

#### **New Out of Office Feature**

You can now set up an Out of Office assistant for the Approval Tracking System. There are two options: 1) set the system to skip your turn, automatically approving your request and moving to the next person in line or 2) set up an alternate approver to whom the system will automatically delegate once the approval sequence is assigned. Once you come back to the office, uncheck the out-of-office selection, and the approval process will continue as before.

#### **Ability to clone a Governing Body/Body Type**

You can now copy all settings from another body in **Admin > Workflow Control** area with one click. A warning message will indicate that all settings will be overwritten once you accept the message.

### **Bug Fixes**

#### **Default font size in Minutes module zoom boxes is too small**

We've increased the font size in the Minutes module zoom boxes to 12 pt. The font size in the text box itself remains as is.

#### **Error message displays when generating Target Code Sections report**

You'll no longer get the pop-up box error "Object reference not set to an instance of an object" when generating a Target Code Sections report. The report now works as it should.

### **File Type Sort order not saving correctly when set up in Admin > Legislative Files**

- **SalesForce Case #222500**

We've fixed the code to enable saving of sort order for File Types, File Statuses, and Body membership.

## **December 4, 2015**

### **Legistar**

#### **New Features**

##### **New ATS: Double selection menus for Approver name; can't select the name from the top dialog**

There is now only one drop-down menu shown for the **Approver Name**, and values can be selected.

##### **Ability to set custom time for ATS escalations/email schedule**

We have re-added the ability to set custom times for ATS escalations and emails. The default time is 00:01 (12:01 a.m.), but this can be specified to run at any time using a 24-hour time format using the system setting ATS Automation. For example, 7:30 p.m. would be set as 19:30.

## **November 11, 2015**

### **Legistar**

#### **New Features**

##### **Batch Update utility**

The batch update utility allows you to perform a search in the **Files** module to get a set of records. Go to **Tools > Batch File Update** and use the utility to update specific data (e.g., status, agenda date, final action date, controlling body) for all of the records at once.

**ATS Enhancement: FYI notifications to be part of daily summary**

- **SalesForce Case #185530**

FYI notifications are now included in the daily summary report.

**Bug Fixes****Approval sequence should not allow deletion of people who have taken an action**

The **Delete** button is no longer enabled for approvers who have already taken an action in an approval sequence.

**Switching from Agendas to Minutes results in incorrect color in the top frame**

Selecting an Agenda from the **Agendas** module, and then clicking **Minutes** in the menu at the top no longer results in an incorrect color. The panel at the top of the agenda now correctly displays as light gray rather than dark gray. This issue has also been corrected for switching back to Agendas from the Minutes.

**Padlock icon not working on Minutes screen; works from Tools menu only**

- **SalesForce Case #214660**

The **Padlock** icon now works from the **Minutes** module; previously you had use the **Tools** menu to lock or unlock.

**Inconsistent Log-on Name Creation in Legistar**

- **SalesForce Case #229023**

**October 30, 2016**

**Legistar****Bug Fixes**

**Cannot delete file if searching for it, but can if loading from recent files**

**Agenda description column**

- **SalesForce Case #219246**

After the latest release of Legistar, the agenda description field was displaying the **Title** field. Now, if "Sync Title With Agenda Description" setting is on No, the agenda description field does not update the file Title.

### **Approval History not displaying on Ceremonial Resolutions**

- **SalesForce Case #205958**

### **Not saving votes for add-on items**

- **SalesForce Case #209005**

Issue has been addressed in Legistar—users can now record votes on "add-on" items, while previously those votes would not "stick."

### **Running Certified copy report to PDF (file 0-4-15) shows grabbed text**

- **SalesForce Case #206207**

### **West Allis agenda not generating according to Admin settings**

- **SalesForce Case #221260**

### **Duplicate Files cannot be added to agenda**

- **SalesForce Case #221432**

We have addressed an issue within the Minutes module that was intermittently preventing duplicate files from being added to an agenda via drop-down menu or manual add.

### **Corrected ATS bugs**

#### **Approval sequence cannot be started with only FYI although setting is turned on**

- **SalesForce Case #190202**

The setting "Allow to start ATS sequence with FYIs only" is now checked when attempting to start a sequence with only FYIs present.

#### **Requester is being changed in error; shows person who is not the requester by default**

- **SalesForce Case #190667**

### **Duplicate names in ATS after changing due dates and deleting a person from the sequence**

- **SalesForce Case #188387**

### **Email Template is blank when escalating approver**

When escalating an Approver, the new Approver's email template was previously blank although an email was still sent to the new Approver. This issue has been fixed so that the default email type is now set in the UI upon escalate.

### **Sequence disappears (Legistar crashes) after reloading saved sequence**

### **Enable Save button in ATS if the approver is highlighted**

When starting a sequence and selecting the Approve tab, the Save button was not highlighted until the Admin clicked the Approver line again. This is no longer applicable in the new system since the Save button was removed, and actions are taken by clicking buttons.

### **Cannot delete file because it thinks it is in approval process**

- **SalesForce Case #186589**

### **Ongoing issues receiving FYI emails: emails received only approximately 50% of the time**

- **SalesForce Case #187852**

### **Sequence shows in review when paused**

- **SalesForce Case #221201**

### **User is unable to change the order of the approvers in ATS**

- **SalesForce Case #183234**

### **User is unable to approve although sequence has reached them; user is instead escalated to alternate**

- **SalesForce Case #208779**

**Approval Tracking email for alternate sent when it shouldn't be**

- **SalesForce Case #204722**

**Possible to approve out of sequence after disapproving****SalesForce Case #187805****FYIs changing to Approvers after escalation**

- **SalesForce Case #206112**

**User with rights cannot add new approver/sequence after disapproving: Add new setting called "Approval Sequence Admin"**

In the past, the current approver was able to make changes to the sequence based on their individual security settings, but these actions are limited to the Requester of a file and a System Administrator.

In order to enable a current approver to make changes to the sequence (add, change sequence order, delete, etc.), there is a new security setting called Approval Sequence Admin that allows users to act as Requesters. This setting must be checked in addition to any individual setting (e.g., add, delete). If Approval Sequence Admin is unchecked, a user will not be able to take those actions, even if they have the individual settings checked.

1. Approval Sequence Admin checked and all others unchecked: User can take actions such as Escalate but can't take any of the other specified actions such as Add new or delete approvers.
2. Approval Sequence Admin checked as well as all others: User is considered a requester and can do everything listed, including Escalate.
3. Approval Sequence Admin unchecked and all other settings are checked: User is not able to do anything to the sequence except Approve/Disapprove unless they are the Requester.
4. All settings are unchecked: User and Requester are not able to do anything to the sequence except Approve/Disapprove

**Sequence disappears from view after changing email template without saving**

We've corrected FYI template in ATS to prevent people from getting skipped in approval process

When you set up a template and included FYI for a template meant as an individual request the sequence stopped at the first person with this status. Then when they approved it skipped to the next person with a True approval template. We have resolved the issue by removing the ability to approve as people receive it because the FYI template in ATS is for informational purposes only.

### **Inconsistent behavior when adding duplicate names in ATS sequence**

Previously it was not possible to change the name of an approver that already existed in the sequence. Now a person can exist multiple times with the same or different email template.

### **InSite ATS: Approval sequence doesn't complete and file status doesn't change when last person in sequence approves from InSite**

### **System is not changing file status upon completion of sequence**

- **SalesForce Case #206422**

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## [October 2, 2015, Maintenance Release](#)

### [Legistar](#)

An issue in Legistar, in which votes for add-on items were not saving correctly, has been fixed. You can now record votes for add-on items, and they will save correctly.

## [September 11, 2015, Maintenance Release](#)

### [Insite](#)

#### **Audio Download link fetches both MP4 and MP3**

"Download" link under Audio in InSite will now download mp3 files.

## [August 21, 2015, Maintenance Release](#)

### [Legistar](#)

#### **LMS - Remove calls to Data.WS**

We removed a dependency in Legistar Client that accessed a service intended to be used only by Legistar Server.

#### **Default agenda type for their security role trumping all other meeting types**

If a user created a new agenda from the Agendas section, changed the meeting body, then switched from the calendar tab to the agenda tab, the agenda title still displayed the default body instead of the currently selected body. The title will now display correctly.

### July 31, 2015, Maintenance Release

#### Insite 5.7.17.0

##### **Get server error when approving file from Insite with empty text file**

When taking an approval action on a legislative file without text and submitting the action in Insite (ATS Web), user would get a server error. We have fixed the error and user can now successfully take action on a file without text.

##### **Share buttons are not vertically aligned with RSS and Alerts buttons**

The social networking buttons (Facebook, Twitter, RSS, etc.) on the top right of Insite were out of alignment. The button position has been changed so that all buttons align vertically and horizontally.

#### Legistar 5.2.125.1507.2

##### **Staff Report run to Packet generates files without file extension**

This behavior was likely caused by the renaming of attachments after their upload. Legistar will now check for if a file has had its extension removed and will re-add the extension if so.

##### **"Help" links in Legistar Administration do not link properly to help.granicus.com pages**

The help links in the Legistar Administration window have been corrected to point to the appropriate help pages on the Legistar help web site.

##### **Help Link not working in Legistar**

Previously when invoking the context sensitive help menu from the Approval Tracking tab in Legislative Files module, no help would load. Now the topic on Approval Tracking will launch in the Legistar help center.

##### **Import did not import actions for any Consent Items just the consent master line.**

It appeared that an Import did not import actions for any Consent Items just the consent master line Council Meeting minutes 10/07 for a specific client. After researching the issue, this was found to be a configuration issue with the specific client and the issue was closed/resolved.

##### **Can't delete description from file in agenda - keeps showing up even after deleting from agenda**

When a file attached to an agenda was selected in the agenda history, and its title cleared (removed) the Description text box in file details still showed the title that was cleared. The fix makes sure that the Description text box in file details is also cleared if the file title is cleared.

## July 17th, 2015, Maintenance Release

### Legistar 5.2.125.1506

#### Bugs:

#### **Corrected an issue that caused the file description from appearing in the agenda grid without a Refresh command.**

The file description did not appear in the agenda grid without a Refresh command when you followed the following steps:

- Opened an agenda in Legistar
- Added a file to it by clicking **Add** at the bottom of the screen
- Selected a file which has a title by double-clicking on it from the File ID drop-down list
- Saved the agenda

Now, after a file is added to an agenda, the file description appears in the agenda grid without a Refresh command.

#### **Modifications to Prevent Copy Files from Replacing an Original Agenda**

When you clicked on an item listed in an existing agenda and clicked **Copy File**, the screen copied the majority of the information from the existing item and generated a new file ID for the new item. When you saved the new item and clicked **Go Back**, the existing item in the agenda was replaced with the new-copied item. To prevent the Copy File from replacing an original agenda, follow the steps below:

- **Create** a file
- **Add** it to an Agenda
- Select the **Agenda** in the Agenda Tab
- **Double-click on** the Agenda Line item that contains the File you created to open it.
- Click Tools-> **Copy File**
- In the pop up box, select to copy the file with a new File ID  
Click **Go Back**

#### **Spell check does not work when a Signature Report is generated into a Word Document**

When generating a Signature report into a Word document, a yellow banner displayed in Word that said, "MISSING PROOFING TOOLS This document contains text in German (Germany) which isn't being proofed. You may be able to get proofing tools for this language." Additionally, closing out of the banner did not resolve the issue and the proofreading tool did not detect errors. This issue has now been resolved.

## **Corrected repeated error in MediaManager logs caused by items with duplicate GUIDs.**

We've corrected an issue that caused a repeated error in the MediaManager logs for Legistar-integrated clients. Two metadata items with the same GUID caused the error.

## **Searching an agenda file via a date search produced a file associated with the wrong agenda date**

When doing a file search on agenda date, you could not find the file after processing the imported minutes and finalizing the meeting. Ultimately, the missing file had an action taken which set a new agenda date. The new agenda date showed on the file screen. We have resolved the issue to ensure you can search the file by date and the correct file is associated with the correct date.

## **June 5, 2015, Maintenance Release**

### **Legistar 5.2.125.1505**

Feature:

Current Approver's Line is now highlighted in the ATS sequence.

We've added a feature that highlights the person who is currently in control of an ATS sequence. The entry for that person in the ATS grid is bold and green.

Bug Fixes:

Introduced a check box on the Actions tab in Minutes called *Failed Without Second* to correct an inconsistency between Legistar and MediaManager

The result of a vote is recorded when a member moves to make a motion on an agenda item in LiveManager. If a motion is not seconded by any other member, the motion fails for a lack of a second. Previously, this result was recorded in LiveManager. However, Legistar didn't have a corresponding field in the minutes history. We've added a check box below the Secunder drop-down on the Actions page in Legistar to correctly capture the vote.

Corrected an issue in Legistar to ensure the file number stays the same when switching between the Minutes and Action tab

When switching between the Minutes and Actions tab the file number switched to the top of the list of files. We've corrected an issue in Legistar to ensure the file number stays the same when switching between the Minutes and Actions tab.

Fixed an issue regarding votes not displaying when navigating from a file's History due to springsys changes

Due to springsys changes, a blank screen instead of votes were displaying when you navigated from the History tab. Now when you navigate from the file's History tab, you are taken to the Minutes/Votes section.

Corrected an issue to ensure that all drop-downs stay on the Actions subtab when the screen is minimized

The Motion Text area remained large, but the Seconder disappeared from the view when you opened any minutes and selected and minimized the Actions subtab. Now, all drop-downs are visible at all times.

## May 15, 2015, Maintenance Release

### Legistar 5.2.125.1505

Story:

Added [DEPARTMENT] variable in the ATS email notifications

We've added recognition for the [DEPARTMENT] variable in the ATS email notifications. Now, when you get an ATS email about a File and that File has a Department assigned, the [DEPARTMENT] variable is replaced with the department name.

Bug Fixes:

Removed 3rd party controls for all tabbed displays in Legistar and replaced them with the native .NET control suite

In prior versions of Legistar a proprietary 3rd party controls were used for all tabbed displays in the application. As part of this release, Granicus has removed all references to these legacy 3rd party controls and replaced them with the native .NET control suite. This change will help the Engineering team to continue to scale and enhance Legistar in a more managed way, while also removing blocking impediments introduced by the 3rd party controls that prevented us from applying our standard Engineering/Quality Controls practices to portions of the Legistar application. You may notice some slight differences in "look and feel" on forms that contain tabbed pages. This would include some slight changes to fonts, font sizes, coloring and padding/spacing between controls. These changes should not impact existing functionality or usability and will provide numerous benefits to the long term health and stability of Legistar. Noticeable look and feel changes will be addressed in future releases.

Added a warning box to FYI template in ATS to prevent people from getting skipped in the approval process

We've added a warning popup box when you select an FYI email template in Admin. By default the FYI checkbox is not checked. The box should never be checked unless the email template is an FYI email. You will now be prompted via the popup box to select Yes when you create an FYI template. Turning on the FYI functionality will prevent people from being able to approve items.

Display Names are no longer case sensitive and can be edited in Admin

When you changed the display name from uppercase to lowercase or visa versa in Admin, an error message appeared preventing you from editing the Display Name. You can now edit Display Names in Admin.

Added messaging and modified the Security Log view to prevent users from unintentionally deleting people from the Granicus system

When a user was deleted from the System Users list in Admin, we didn't verify if there were security log entries associated with the user. This resulted in empty values for the User column in the Security Log window.

We've implemented a fix to check the security log entries in the database for the User about to be deleted. We've also added messaging that explains there are existing security logs for the user and that we recommend you mark the user as Inactive, otherwise the user ID will be lost in all security logs. Finally, we've modified the Security Log view to indicate Deleted User in the User column, if the user doesn't exist in the database anymore.

Authors received an email showing a member of staff changed their file when no changes were made to a file

Authors received an email showing a member of staff changed their file at some point in the sequence and an email was sent referring to a person who was not in the sequence and had never edited the file. We have corrected this issue and authors no longer receive an email showing a member of staff changed their file when no changes were made.

## April 24, 2015, Maintenance Release

### Legistar 5.2.125.1504

#### Feature:

Added a new System Setting and updated the Telerik theme on the Calendar controls

The default theme was applied and the color contrast was set in a default theme not ADA compliant. We've created a custom theme with the Telerik theme builder and applied it to the grids in InSite. Grid controls now pass ADA compliant evaluator for the browser. We've also implemented a new System Setting, Hide Disabled Links On Calendar. By default the system is set to No. To enable this setting change the drop-down to Yes on your System Setting page. Enabling the new setting stops links that are disabled from rendering in the calendar grid display.

#### Bug Fixes:

Updating a text file from Insite ATS now updates the preview window in Legistar

Previously, when you updated a text file from Insite, the ATS preview did not update the preview window in Legistar regardless if you refreshed. However, if you clicked Edit, the new changes would appear. Now, when you update a text file from InSite it updates the preview window in Legistar.

The controlling body no longer reverts back to the original Body for systems with multiple referrals enabled

In the past, when a non-referral action, that is closing referral, was taken on a File by the committee on the Council's meeting, File's In Control Body got reset to the Council. We've implemented a fix to

prevent change of the File's In Control Body because there are no referral actions here. Note: this issue is relevant to multiple referrals enabled systems only.

Controlling Body gets set back to the last referred to committee when closing referrals for systems with multiple referrals enabled

Before, when an item was referred to multiple committees and those committees took action on it by closing referrals, the File's Controlling Body did not get set back to the original Body. Now, after Final Closed Referral File's Controlling Body is set to the original Body, as well as when taking a referral action by the committee, the Controlling Body is changing to the last referred committee. Note: this issue is relevant to multiple referrals enabled systems only.

Action Minutes in the In Control drop-down now change when referring item for systems with multiple referrals enabled

Previously, when action was taken on an item referring it to a committee the In Control Body didn't change to the target committee. To resolve this issue, we've changed In Control Body of the File to the target Body when referral action is taken on a File. Note: this issue is relevant to multiple referrals enabled systems only.

Corrected Laserfiche Integration when exporting agendas with Final Action Date set for files

When Archiving Agenda to Laserfiche, an error was occurring when Agendas had Files with a Final Action Date. We have resolved this issue. Archiving now runs without errors for the Agendas with files having Final Action Date filled.

## April 3, 2015, Maintenance Release

### Legistar 5.2.125.1504

New system setting that allows auto export to always sync regardless of the status

Previously, when a system was configured to auto-sync meetings to MediaManager, only meetings in non-final status would be synced. We've introduced a new system setting, Always Auto Sync Regardless Of Meeting Status. By default, the setting is set to No. To enable this setting change the Always Auto Sync Regardless Of Meeting Status dropdown to Yes under System Settings.

Bug Fixes:

- When you deleted a legislative file's Text version while an approval sequence was in progress, the Granicus system continued to send emails to the approver next in line for that sequence. Now when you delete a legislative file's Text version with an approval sequence in progress, the sequence attached to that version gets deleted and no emails are sent after the file's Text version is deleted.
- Previously in Admin when you set up an Approval Sequence without entering due dates and ran the Approval Sequence report, due dates would appear with miscellaneous numbers. Now when you set up an Approval Sequence without entering due dates and run the Approval Sequence report, due dates appear as 0.

- In the past, when you selected a user and clicked Delegate Ownership in File Assignments, you would receive an error message. Now when a new owner is delegated, the new owner becomes the owner without an error message displaying.
- The advanced and simple search features have been enhanced. The Advanced Search now returns search results for the exact keyword or phrase that you enter. The Simple Search feature now returns search results for all keywords entered into the search field.
- Due to the large number of records, running the Matters Introduced Report and querying for a sponsor for more than 14 years returned an error message. We've enhanced the search and the report now displays properly without errors.
- Previously when you updated a text file from Insite, ATS did not update the preview window in Legistar regardless if you refreshed. However, if you clicked Edit, the new changes would appear. When you update a text file from InSite it now updates the preview window in Legistar.
- Formerly, the calendar control for Due Date and Return in the History tab of a legislation file would show on top of the Results buttons. If a date appeared on top of either the Pass, Fail or None selections, that date selection would incorrectly change the result below. To prevent this issue from occurring, the calendar controls now show above the radio buttons.

## March 2015 Maintenance Release

### Legistar 5.2.125.1503

Legistar is a hosted application. Unless you've made other arrangements with us, you don't need to do anything to receive these updates.

Send ATS emails when a file is changed in the Word editor

The *Send Email On Text File Change When In Approval* option now allows you to receive ATS emails when a file is changed in the Word or Legistar editor.

Adding multiple Attachments to files simultaneously

We've added a new feature that allows you to add multiple attachments at the same time, rather than adding one attachment at a time through the dialogue box. To perform this function, hold down the CTRL or Shift key and select the attachments you want to add.

Convert File Packet attachments to PDF

After running the File Packet, attachments are converted to PDF. Only the PDF versions are placed into the File Packet directory.

Legistar displays email addresses when feedback or questions are left in the Help Center

Instead of your username, your email address now displays when you leave feedback in the Help Center while logged into Legistar. A Granicus staff member is notified and you receive a prompt response sent to your email address.

Bug Fixes:

- In Admin, when you restrict the agenda date to Yes, create a new file and click the Calendar for the agenda date; it now opens and highlights the available dates.
- By default, the Agenda or Minutes screen is now in edit mode and not read-only, as long as the Agenda is not locked.
- The Agenda Number Suffix is now added to agenda numbers when *Re-number Agenda Headers and Items* is set to Yes.
- We've removed the Approval Web Link from the Tools menu on the Minutes and Agenda screens.]
- When you add a member name in the Roll Call section of a report, we've added *Use Office ExtraText With Roll Call* to the Meeting Minutes File from Admin to the report.

## February 2015 Maintenance Release

### Legistar 5.2.125.1502

#### Updated the Username field

We've changed the format of the Username field to include a user's first initial and last name instead of a user's first and last name when creating a new user.

#### Synced Title field to the Agenda Description field

Edits to the Title field now automatically update in the Agenda Description field. The agenda description does not update if the agenda status is set to Final.

#### Added File Status and Current Approver to Agenda Grid

We've added two read-only columns to the Agenda Grid, which are the **File Status** and **Current Approver**. The columns can be hidden or shown through the right-click menu on the Agenda Grid's header. The File Status columns' data will appear red if the file is in the approval process and green if it is not.

#### Export Legislation Details with Text Report

You can now export Legislation Details with Text Report to MediaManager, so it displays in iLegislate instead of Legislation Text Report.

We've also added a setting in the Administrator, which allows the user to select if they want the Legislation Text or Legislation Details with Text as the report that is exported to MediaManager.

#### Bug Fixes:

- Meeting Minutes Report settings are now saved in Administration
- On the File's ATS sequence, if the Email Template for the approver is changed to FYI while in Pause mode, approval status is set to FYI to reflect the template change.
- Laserfiche exports no longer fail to archive due to maximum size constraints
- Minutes reports no longer display duplicate attendance and vote records

## January 2015 Maintenance Release

## Legistar 5.2.125.1501

### Bug fixes:

- Duplicate approvers are no longer added after initially declining to start the sequence, then starting it.
- We've fixed a couple spelling errors in the Meeting Attendance and Files Introduced reports.
- The Controlling Body field now returns back to the board after the last committee takes action on the item.

## December 2014 Maintenance Release

### Legistar 5.2.125.1412

#### New Setting for Displaying File Titles in the Recent Files List

We've added a new Legislative Files setting called "Use Title for Recent Files Display on Home Screen". This setting determines how a file is displayed on the Recent Files list in the Home module. When you select Yes for the setting, the title of the file is displayed. If you select No for the setting, if the file name is available, it will be shown; if the name isn't available, the title will display.

#### New Tools menu option for the Agenda screen on the Calendar tab

We've created a new Tools menu option for the Agenda screen that will allow you to change the meeting body of an already generated agenda on the Calendar tab. It appears under the following conditions:

- When the Agendas system settings "Show Change Meeting Body on Agenda Screen" and "Edit meeting Agendas" are set to Yes.
- When the agenda is unlocked.

We've fixed the following issues in this release:

- Duplicate names are no longer added to a sequence when it is re-added after initially been disapproved.
- Emails are no longer sent to people earlier on the list when pausing and restarting an approval tracking sequence. When an approval tracking sequence is paused and restarted, the current approver still receives another email, but previous FYIs or Approvers will not receive one. When a sequence is restarted, the requester and approver will receive an email, but FYIs will not; when a sequence is paused, only the requester receives an email.
- Adding a new person with an FYI status to an approval sequence now lists this person with an FYI status instead of Pending Request.
- Multiple disapprovals no longer cause an approval tracking sequence to become stuck. In this scenario, the current approver now has a review requested status instead of a pending request status.
- If the Pause/Restart security setting is set to No, an approver can now still add and start a sequence after a disapproval.
- Security logs no longer incorrectly show changes related to users who cancelled or disapproved approval tracking sequences.
- We've resolved an issue where running the any file report and setting Packet as the destination was causing an error message stating you could only print attachments if sent to the printer.

## November 2014 Maintenance Release

### Legistar 5.2.125.1411

#### Confidential File Access

We've added a Confidential checkbox to the Details tab in the Files module. Select this checkbox for

any given file so that only users with permissions to see confidential files can view it. The users' edit permissions are inherited from normal edit permissions.

File ID  ID    Type     Status

In Control     File Created

Title     Agenda Date

Final Action

**Staff Report** | **Attachments (1)** | **Associations** | **Details** | **Approval Tracking** | **Minutes History**

Subject      Not Viewable Via InSite

Department     Agenda Section

Drafter     Cost

Internal Notes

Agenda Number     Enactment Number

Effective Date

Confidential

Last Edit

To facilitate this functionality, we've added a new "Can View Confidential Files" security restriction to the System Security > Security Features > Functional List tab in Legistar Administration.

**Functional List** | **Body Security**

- Edit Legislative File Final Action Date
- Edit Legislative File History
- Edit Legislative File ID
- Edit Legislative File Indexes
- Edit Legislative File Sections
- Edit Legislative File Sponsors
- Edit Legislative File Status
- Edit Legislative File Text Files
- Edit Legislative File Type
- Edit Legislative File Version
- Edit Legislative Files
- Lock/Unlock Legislative File
- View Confidential Files
- View File Assigned for others
- View Legislative File Attachments
- View Legislative File History
- View Legislative File Previous Versions
- View Legislative File Reports
- View Legislative File Text Files
- View Legislative Files (draft)
- View Votes on File Form

### **Error Handling and Memory Usage Improvements in Reports Service**

We've improved error handling and memory usage in our Reports service. This addresses some recent stability issues in InSite reports and Legistar agenda packet generation for some clients.

### **Legistar Users can now use the Block Voting Feature in LiveManager**

Legistar users can now use the block voting feature in LiveManager as a result of the following change we've implemented: When you export agendas to MediaManager, the headers and files now maintain their parent/child relationship so the tree in MediaManager is built correctly.

### **Enactment Number Added To Search Results**

We've added the Enactment Number column to the search results grid and report in the Search module.

### **Laserfiche Export - Templates**

If you use the Laserfiche integration, you can now assign a Laserfiche template to the attachments as well as the agenda when you export an agenda. This is set in Legistar Administration: Laserfiche > Body Settings (Bodies, Templates). Note that templates are not assigned to cover pages.

### **Bug Fixes:**

- The roll call no longer has a duplicate entry when you generate a generic Minutes Report after importing a meeting from MediaManager.
- We've fixed an issue in our security logs that was causing the wrong user to be shown making changes to files during Approval Tracking Sequences.

## [October 2014 Maintenance Release](#)

### [Legistar 5.2.125.1410](#)

#### **Administrators can now delete ATS sequences that are no longer in use**

Administrators can now delete ATS sequences that have previously been used but are no longer in use. Deleted sequences will no longer appear as an option in the Add Sequence list under the Approval Tracking tab.

#### **Users can no longer see files that are restricted by body security**

When files are restricted based on body security in Administration, users belonging to a specific body can no longer see other bodies' files in the Related Files list under the Associations tab or in the Agenda - Add Item or Add Many Item screens in the Agendas module.

#### **Laserfiche Export - Templates**

When users with the Laserfiche Integration export an agenda, templates are assigned to the attachments as well as to the agenda. This is set in Legistar Administration - Laserfiche - Body Settings (Bodies, Templates).

We've fixed the following issues in this release:

#### **Administrators cannot restrict access to certain reports**

The Approval Status, Mailing Labels, Pending Items List, and Upcoming Agenda Items reports are now

listed under Legistar Administration security settings (System Security > Security Features), so they can be restricted by administrators.

### **Error Message when entering an Agenda Date for Minutes Actions that are set to "Approved on first reading" or "Postponed"**

Under the Actions tab, you no longer receive an error message when you try to enter an agenda date after selecting either Approved on First Reading or Postponed as the status for a minutes item.

### **Meeting Minutes Import Error**

You now receive an error message when importing minutes to Legistar fails because extra attendees whose names don't exist in the Legistar database were added to the roll call in LiveManager/MediaManager. If you manually re-save the roll call in MediaManager, the import works without errors.

### **Locked File is Stuck because Department is set as required but the Department is not filled in**

We fixed an issue where a locked file with a required Department Field could not be unlocked because the field wasn't filled in, and the field could not be filled in because the file was locked.

## September 2014 Maintenance Release

### Legistar 5.2.125.1409

#### **New System Setting that Restores Ability to start ATS sequences with FYIs only**

We've added an "Allow to start ATS sequence with FYI only" system setting in System Settings > Approval Tracking. For those of you who use sequences as an informational process rather than for approval tracking, this enables you to start sequences that contain FYIs only. When the sequence is run, an email is sent out to the FYI members, and the sequence is immediately considered complete; the file's Status field changes accordingly.

When this system setting is enabled, the Start button is available when only FYIs are in the sequence. If the setting is disabled, the Start button is not available.

#### **Bug Fixes:**

We've fixed the following issues in this release:

- Older converted files are now deleted when a change to the original file is detected after the agenda packet has been run, and the latest version of the attachment now appears in the agenda packet. We also added notifications when errors are detected to allow proactive support, and we fixed an intermittent issue that was causing the conversion process to fail, and error files to be created.
- Importing roll call and vote records from MediaManager no longer shows incorrect data in Legistar.
- In Approval Tracking, the agenda date field no longer goes blank when you click the Save button located at the bottom of the screen after adding a sequence.

## August 2014 Maintenance Release

## Legistar 5.2.125.1408

### Bug Fixes:

- When you approve a file via the web, the approved file status now changes to the correct status based on the sequence. Previously, it was changing to the default status instead. In Legistar Administration, there are two ways to control this:
  - You can set the "Approved File Status" for a sequence in the Approval Tracking > Approval Master screen.
  - You can set the "Files status on Approved" for a file in System Settings > Approval Tracking.
- System administrators who aren't part of an approval sequence can now use the Cancel button to cancel that sequence.
- In Legistar Administration, the Duration field on the Government Bodies > MediaManager Export Settings tab no longer allows you to enter durations greater than 16 hours. This is because MediaManager does not allow you to create events that are greater than 16 hours (960 minutes). An error message is displayed if you enter a value higher than 960 in the Duration field.
- For Agenda reports published to HTML, we fixed an issue caused by a Crystal Reports upgrade that was causing attachments to not open. We also fixed an issue with overlapping text and truncated fields on these HTML reports.

## June 2014 Maintenance Release

## Legistar 5.2.125.1406

### Calibri font now available in Legistar reports

You can now use the Calibri font in all Legistar reports, as we've upgraded the version of Crystal Reports we use to generate these reports.

### Batch Delete data in Files, Agendas, and Minutes modules

You can now run a search and then perform a batch delete on the search results in the Files, Agendas, or Minutes modules.

### Index sort order in File Associations tab

We've added a setting in Admin > Legislative Files allowing you to customize the sort order for indexes on the File Associations tab. The setting is called *Alpha Sort Indexes on Matter Files* and is set to YES by default, which sorts the indexes alphabetically. If this is set to NO, the indexes are sorted in the order in which they were added.

### Present Tense and Past Tense Action Text Variables

We've added Past\_Action and Present\_Action as variables you can use in Action Text templates, which are available in Legistar Administration > Workflow Options > Action Text. These variables allow you to choose the tense you want to use in your Action Text.

### New Change Requester on New Sequence Setting in Administration

We've implemented a new *Change Requester On New Sequence* in the Legislative Files System Settings in Administration. This is set to Yes by default. If set to Yes, the Requester field changes to the approver who added the additional people to the sequence, and this approver now receives the

requester emails. If set to *No*, the requester doesn't change and the original requester continues to receive the emails. This addresses an issue where the Requester field changed to an approver when the approver added additional sequences/approvers to an ATS, resulting in the original requester no longer being part of the ATS process.

### Bug Fixes:

- Approval tracking sequences no longer close and become out of order before the sequences are complete.
- Approval tracking sequences no longer intermittently make non-business days an escalation date, and no longer skip Mondays and Fridays.
- Approval tracking sequences no longer lock when escalating to some alternate approvers.
- You can now pause approval tracking sequences after a file is disapproved.
- Disapproval emails in approval tracking sequences are now being sent to all approvers in the sequence, not just the requester of the sequence.
- Enactment numbers are no longer being set on failed votes when the setting *Do not set final action date and enactment number on failed vote* setting is set to *Yes* in Legistar Administration (System Settings > Minutes).
- Actions with no votes no longer change the file status to *Failed* when you finalize the meeting. The status is now set to *Passed* for files if no vote is taken and the file status is set to *Passed*, and *Failed* for files if no vote is taken and the file status is set to *Failed*.

## May 2014 Maintenance Release

### Legistar 5.2.125.1405

#### Printing ..sections on Agenda and Minutes

It's now possible for you to choose the text sections you want to print on agendas or minutes. This is similar to the master and text file report. The options in Legislative Files > Text sections in Administration are listed in the report. The text was also changed to Show ..Title instead of Text Title in Legistar and Legistar Administration. This change will be enabled upon request, as work may need to be done to your reports if you have a custom agenda or minutes.

### Bug Fixes:

- We've fixed an issue where the Import procedure did not run due to a procedural action taken on a header line. An action of adopted was taken on a header line "Adjournment" with a roll call taken, which caused the system to look for additional attributes, which usually come from the Agenda Item.
- We've fixed an issue where the color of the Action Notes text was brown rather than black when a user imported from Live Manager and also when they entered new text. Action notes now show up in black by default.
- Users no longer receive an error when they attempt to open the Standard Paragraphs window from the Actions tab in the Minutes module.

- We've fixed an issue where meetings could not be imported to Legistar due to roll call names that included special characters; for example, Åsa Forsman and David Uño.
- We've fixed an issue that caused consent items to become unmarked when users clicked on other lines in the minutes. The issue arose when users clicked on the grey area of the grid, rather than on the file item (with a consent agenda file type) itself.
- When users attempt to attach an open Word document, the upload process is cancelled and an error message is displayed that instructs users to close the document before attaching it.
- The Requester field now defaults to the current requester rather than the original requester when adding and starting approval tracking sequences. For example, if User1 adds and starts a sequence, and User2 disapproves the sequence and adds a new person to the sequence, then User2 is now set as the requester. In another scenario, if User1 adds and starts an approval sequence and the sequence is completed when the file is approved, and then User2 adds and starts another approval sequence, the Requester field changes to User2. Note that there can only be one requester per sequence. So if there are 2 different people adding sequences, only the person who added them most recently will receive emails.
- An Object Reference error no longer occurs when users publish an agenda to InSite before they have exported the meeting to MediaManager. However, the following message is displayed: "Please note the agenda has not been exported to MediaManager, so Legistar is unable to send a link to your agenda in MediaManager."

## April 2014 Maintenance Release

### Legistar 5.2.125.1404

#### **New Error Message about Pinning the Legistar shortcut to the Taskbar**

We've added the following error message for Windows 7 and 8 desktop users who may have pinned their Legistar shortcut to their Taskbar with the application running (this blocks Legistar's auto-update functionality):

The help article is available at the following link: [https://help.granicus.com/99kb/Pinning\\_Legistar\\_to\\_the\\_Windows\\_7\\_or\\_8\\_Desktop](https://help.granicus.com/99kb/Pinning_Legistar_to_the_Windows_7_or_8_Desktop). In order to pin Legistar to the Windows 7 or 8 desktop, pin the shortcut to Legistar5.exe (Legistar launcher) instead of the running application.

#### **Bug Fixes:**

- An object reference error no longer occurs when users click Go Back to return to the agenda from a file with a final action set.
- The Approver Status Report no longer shows the entire title if it is very long. Previously, it was loading with a blank first page because the title was too long to fit on the first page. The report itself was not blank, but users needed to scroll down to view the information.
- The Upcoming Agenda Items Report now launches correctly, and works properly when users specify a particular body and date. The list in this report now matches the search results page when running the File Summary Report, for example, if you do a search in the Files module for that selected body, include an Agenda Date, and set the Final Action to NO DATE.

- In Legistar Administration, the help links now work on the People > Photo & Signature screen, People > Address screen, and the Workflow Control > Workflow Options screen.
- Disapproval emails sent to the requester and approvers now include the action note and date. Previously, only the person that disapproved the item received an email with the action note included.
- The default name sponsor list on the Associations tab is now narrowed to the office members at body level. The list is sorted alphabetically and no longer includes inactive person records. Previously, when a user set a default name sponsor using their local settings, the list was not alphabetical and included inactive people.
- When adding a person to an approval tracking sequence, the Due Date is now in business days rather than calendar days.
- When an agenda is imported back to Legistar, the Media column on the Minutes screen now only displays an ID for an agenda item if the item has been timestamped in LiveManager. Previously, the column was displaying an ID for all items, even when there was no timestamp recorded for an item. This was causing false indexes to be displayed on the Meeting Details page in InSite. There are two possible scenarios that will occur, depending on whether you are using the full Legistar - LiveManager integration:
  - Without the full integration: Only timestamps are imported, so the Media column will have a number in it if there is a timestamp.
  - With the full integration: The Media column is populated for each agenda item even if there is no timestamp recorded for an agenda item

## March 2014 Maintenance Release

### Legistar 5.2.125.1403

#### Improvements to Legistar On-screen Descriptions and Messaging

We've improved the wording of several of the on-screen descriptions and messaging in various areas of Legistar to provide a better experience in the application.

#### New Alternate Approver Emails

We've improved the default wording of the Alternate Approver email template. These emails are sent when a review is escalated to an alternate approver but no alternate approver exists, and the sequence isn't cancelled. If you've already customized the Alternate Approver email template, your content will not change.

#### Bug Fixes:

- Usernames are now encrypted throughout the application.
- When requesters start a sequence that includes FYIs and approvers, the FYIs and approvers receive a notification email. However, if the requester pauses the sequence and then restarts it, the people that have already received emails won't receive an email again. The next approver in the sequence will still receive another email, but previous FYIs or approvers won't receive one.
- When users close Legistar after attaching documents or using Word, the application no longer crashes and keeps the LMS.exe running in Task Manager. It was still possible to open Legistar after this crash, but this was potentially resulting in a lot of instances that could lead to additional issues.

## February 2014 Maintenance Release

### Legistar 5.2.125.1402

You can now generate the Legistar 4.8 Referral List report from Legistar 5. This report is available from the Home module. In addition, we've fixed the following Legistar bugs:

- Agenda Packets now download the PDF version of files. Previously, they were downloading in the original format in which the files were uploaded.
- Legislative file attachments now appear as PDFs in VoteCast. Previously, they were appearing in the attachment's original format instead of converting to PDF.
- The No Vote Action Text template now populates with the correct data on load.
- We've fixed an issue that was causing an "Argument Expression is not a valid action" message to appear on importing minutes data from MediaManager into Legistar. Minutes data now imports properly from MediaManager.
- Legistar will now launch LiveManager on whatever encoder was chosen during an export. This allows for proper functionality in jurisdictions that use Legistar and have multiple encoders and/or committee rooms.

## January 2014 Maintenance Release

### Legistar 5.2.125.1401

#### **Legistar Approval Tracking System Bug Fixes:**

- If an approver disapproves an approval tracking sequence, and then the requester adds a new person to the sequence and restarts the sequence, the next person in line is now the person who was just added. Previously, the person who disapproved the file was next in line.
- Attempting to save a personal Approval Tracking Sequence on the fly in the Approval Tracking tab no longer causes an "Object reference not set to an instance of an object" error.
- The Start button is now enabled when a requester adds people to a sequence and restarts the sequence after an approver has previously disapproved it.
- Legistar no longer crashes when a requester adds a new person or clicks away from the Approval Tracking tab after saving an existing approval sequence as a new sequence and using the arrows to move people in the sequence. Additionally, the Save button is now available and the sequence can now start successfully when a requester changes the email template (e.g., from FYI Notification to Individual Review Request) after adding an approval sequence.

## December 2013 Maintenance Release

### Legistar 5.2.125.12

#### **Improved upload and download speed for attachments**

Legistar attachments now upload and download more quickly.

#### **The ATS Save button is now disabled when it isn't needed**

Clicking Save is unnecessary in certain Approval Tracking (ATS) scenarios; for example, when adding a sequence or disapproving a file. The Save button now remains grayed out unless there is a specific reason to click Save; for example, when adding a new person to the sequence. This change addresses several ATS issues that were being caused by users clicking Save unnecessarily.

## Approval Sequences containing only FYI notifications are now disabled

It's no longer possible to start a sequence that only contains FYI notifications, as there is no action to be taken.

## Filtering Word Templates

If Legistar is set to use Word as the text editor, you can now filter your Word templates in two ways:

- Based upon your department. For example, if you belong to the Finance Department (which is set on your name record), the only templates available to you are the ones that are assigned to the Finance department. Note that you can assign a template to multiple departments.
- Based upon file type. For example, you can assign one or more Word templates to a resolution so that only those templates are available when you create a new resolution. Note that you can assign a template to multiple file types.

You can assign templates to government bodies/file types in Legistar Administration (under Legislative Files > Text File Templates). Note that templates are cached for 60 seconds; therefore, changes made in Administration are not immediate. Finally, if you don't use this feature, all templates will be listed by default in Word.

## New Approver Status Report

You can now run a report that lists all the files that are currently in a "Review Requested" or "Review Paused" status for any given approver. This report shows how many files any given approver still has to act on. The report is available from the Home screen, and displays the following data: File ID, Approver name, Request Date, Escalation Date, Agenda Date, Title. You can select 1 or more approvers, and whether to show or hide paused sequences.

## Printing Legislative File Search results

We've added a Report button to the Files module so you can print a PDF of your legislative file search results in the same format.

## LiveManager Notes imported into Legistar are now attached to the motion

Notes taken in LiveManager are now attached to the corresponding motion upon which they were recorded (instead of the parent item) when they're imported into Legistar. If there are several notes under one motion, they will all go into the same note in Legistar.

## RTF File Size Limit has been raised

We've raised the limit for RTF file size to 100 MB. The limit used to be 10 MB.

**Legistar Application Bug Fix:** If you have the permissions to change sequence order, you can now reorder people in an approval tracking sequence after adding a new person.

## Legistar Administration Bug Fixes:

- In Administration, the MediaManager Export Settings tab in the Government Bodies section no longer displays when the System Settings > Minutes > Use Granicus setting is set to No. In addition, the Export Data option doesn't appear in the Tools menu for the Agendas module when Use Granicus is set to No.
- In Administration, if the System Settings > Legislative Files > Laserfiche Enabled setting is set to No, users now still have the option to print a legislative packet in the Files module.

## November 2013 Maintenance Release

### Legistar 5.2.125.11

#### **Pausing ATS is no longer required when editing attachments**

The current approver and the requester can now edit attachments in the approval tracking sequence without being required to pause the file.

#### **Ability to turn off ATS emails**

A Do Not Send Email checkbox is now available for each setting in Approval Tracking (ATS) when configuring the email template. This toggles email notifications on or off for the selected feature.

#### **Legislative Files Packet option**

The Legislative Packet option is now always available when running the new Legislation Text report.

#### **MSI for installations**

It's now possible to install Legistar using an MSI file instead of a self-extracting EXE file.

#### **Motion Text variable for Action Text**

MediaManager Motion Text is now a variable on Action Text templates, pulling in Motion text from LiveManager or MediaManager. This works on import only. If the motion text doesn't exist, this variable is ignored and not printed.

#### **Bug Fixes:**

- The vertical display of attendance or votes now works on the Minutes report
- The duration now properly auto-syncs to MediaManager if set via the Edit Export Options dialog
- Legistar no longer occasionally serves blank PDFs
- The name field now populates on the Export Data form

## October 2013 Maintenance Release

### Legistar 5.2.125.10

#### **Legistar Encryption**

Legistar now uses the AES encryption method, with a 256-bit key, for authentication and password storage in Administration.

#### **Export Options Default Settings Shown in Application**

When exporting a meeting to MediaManager, the Export Options dialog and the Export Data Options screen are now populated with the default settings from Administration > Government Bodies > MediaManager Export Settings. The Event Name field is now editable from the Export Data Options screen.

## Limit Add Many File List Setting in Administration

We've added an Administration setting – Limit Add Many File List – to enable the Add Many File feature to only display files that have an Agenda Date set equal to the Meeting Date. Files not already on the agenda are highlighted in green. If this setting is set to No, the list will populate the way it did previously.

## Exported Agendas no longer have the Meeting Date as Part of their Name

Agendas exported to MediaManager no longer append the Meeting Date\Time as part of the agenda name. This can be configured in Administration > System Settings > General > Export Agenda With Meeting Date. This setting is set to Yes by default.

## Import Progress Bar

We've implemented a progress bar to inform you of the status of imports. It's similar to the export progress bar.

## Bug Fixes:

- We've fixed a bug that was causing the In Progress link to delay appearing on InSite for up to 30 minutes after the start of the meeting. The link now appears shortly after the start of the meeting
- We've fixed a bug causing the report in Administration > Approval Tracking > Approval Master Report > Approval Sequence to always display Request Type as FYI, regardless of how it was set
- We've fixed a bug preventing the PDF Converter from publishing new PDFs to InSite when DOC (MS Word) files were updated in Legistar
- We've fixed a bug preventing the Introduced Date from appearing in legislative files that did not have pre-filled dates
- We've fixed a bug causing the Action Notes field to display in the wrong font and font size when meetings are imported from LiveManager

## September 2013 Maintenance Release

### Legistar 5.2.125.9

#### New System Setting Enables you to Always Display the Export Options Form when Exporting a Meeting

We've created an *Always Show Export Data Options* system setting that enables you to display the Export Options form every time you select Tools > Export Data to export a meeting to MediaManager. This was the system behavior prior to the August "E" release. When *Yes* is selected for this setting, the system will always present you with the form. When *No* is selected for this setting, the form will not appear, but you can access it by selecting Tools > Edit Export Options before exporting the meeting.

Additionally, we've added an option to the Export Options form for those of you using manual export, and when *Yes* is selected for the *Always Show Export Data Options* setting. This option enables users to set the event to automatically start recording.

#### The Action Text dropdown button is now visible on the Minutes screen > Actions Tab

The Action Text dropdown button enables you to select action text once you've accessed the Minutes > Actions tab.

### **It is now possible for users to change their password twice in the same session**

When you attempt to change your password twice in the same session (from Tools > Local Settings), the system now permits you to do so.

### **BUG FIX: "File does not exist" error when opening attachments**

You can now upload and download multiple attachments in quick succession. Previously, uploading several attachments at once was causing the last one to fail, particularly if the files prior to the last one were large.

## August 2013 Feature Release

### Legistar 5.2.125

In addition to Legistar's integration with LiveManager, we've made the following changes in Legistar:

#### **Changed Attachments now Save Successfully back into Legistar**

Users can now open an attachment, make changes, and save that attachment successfully back into Legistar without having to save the attachment locally and manually re-attach it.

#### **PDF Conversion Service**

Legistar attachments in MS Office format are now automatically duplicated in PDF format. These are stored parallel to the native file, and can also be used by other programs such as InSite, iLegislate, LiveManager, VoteCast, or Laserfiche export.

#### **Legistar Import/Export**

Legistar's import/export functionality has been improved. Manual-sync and Auto-sync now have feature parity so that you can choose which one is more comfortable to use without worrying about loss of features. In the absence of all other considerations, Granicus recommends using Manual-sync so that you can choose exactly when you'd like to export your files.

- All attachments now sync to MediaManager regardless of whether or not the attachment checkboxes are selected on the Attachments tab in the Files module.
- Manual-sync now exports the ..Recommended Action and Department fields and the Legislative TextFile report to MediaManager.
- Attachments now appear in the same order in MediaManager and iLegislate as they do in Legistar. The Legislative TextFile report is always listed as the first attachment in MediaManager.
- Auto-sync does not overwrite the auto-start flag on an event in MediaManager.
- Attachments are now exported to Laserfiche as PDFs instead of their native format.

#### **Changes to Legistar**

We've made the following updates to the Legistar application:

- You can now scroll through approval sequence lists that are very long in order to see all your sequences.

- It's now possible for you to set the Requester (Department) field as a local setting so when you add a new file a default value is applied to this field on the Details tab.
- When you download a Word document from ATS Web, it's now saved with the correct MS Word extension so that Word will recognize it the next time you try to open it.
- We've updated Legistar's contextual help to link to the new Help Center.
- You now have the ability to set full justification and tab indents for headers on your Legistar reports.
- You can now print the ..Recommended Action on the generic Agenda report.
- We've made some changes to the default columns view list to highlight the most important information.
- Files with a status containing the word "consent" in it (such as "consent agenda") will automatically be marked as consent when the agenda is generated.
- For users of Word as the file text editor, the Import File option has been moved from the Word Add-In – Templates menu to the Text File tab in Legistar's Files module. Users now click Import under the Text File tab to import a file.

### Changes to Legistar Administration

We've made the following updates to Legistar Administration:

- We've moved the Approver checkbox from the Office Members tab to the People (Main) tab. When setting up approvers, this enables users to mark someone as an approver on their name record without having to create an office member record for that person.
- We've removed the No Vote Action tab from the Workflow Actions-> Action Text section.
- In the User Accounts section, when you change a user's password, the change is logged in the Last Password Changed column on the User Accounts (Main) tab.
- It's now possible to deactivate a user or name even if they have been approvers, as long as they are not currently in active approval sequences.
- Users with read-only rights to a certain body based upon their security body restrictions (set up the Security Features -> Body Security section) are now unable to create a new meeting for that body.
- The New Laserfiche section enables you to specify Global Settings and Body Settings for Laserfiche.

### Bug Fixes

We've fixed quite a few bugs in Legistar and Administration, and one in InSite:

- Changing a name record no longer causes an error stating this record already exists in the database.
- The bottom toolbar no longer disappears when you minimize your screen, switch between screens, or resize your screen.
- You'll no longer receive an error when clicking on the File Assignments feature in Legislative files.
- Publishing an agenda now sends the correct date to MediaManager field, rather than 01/01/0001.
- Legistar no longer creates files with a "-" in the File ID field, and with no required information entered. This was a bug present in Legistar since the April Maintenance Release.
- The Reports tab no longer flashes if you run a report but did not close it before moving to the Home, Files, Agendas, or Minutes modules.
- iLegislate now displays Legistar attachments in the same order as they were entered in Legistar.
- Tooltips no longer flicker in Legistar's Minutes module. This bug was only affecting Windows 7 users.
- The Enactment Number field on the Details tab was too small and cutting off a portion of its contents. We've resized it so the entire number now displays.
- When adding files to the agenda or minutes using the Add Many Lines option, the screen no longer consistently shifts to the right.
- Users no longer have to sign in to InSite multiple times before they are allowed to access the site.

## June 2013 Maintenance Release

## Legistar 5.2.124.6

### **BUG FIX: New Text File Report is no longer missing functionality available in the old report**

If you do a search for legislative files, you can now run the new Text File Report for all of the files returned from this search. Additionally, the new Text File Report now contains generic fields such as **Agenda Date, In Control, Status, and File Type**. This functionality was previously available in the old text file report.

### **BUG FIX: Legistar word templates for text files now use the correct font and spacing**

If you create a new file, or edit an existing file and insert a word template, Legistar now loads the correct font and paragraph spacing that is defined in the template.

## April 2013 Maintenance Release

### Legistar 5.2.124.4

We're pleased to present some significant fixes to Legistar this month. At the top of the list, we've updated the way that Legistar interacts with MS Word so that you're now working directly with that application.

Here's a summary of the changes:

- We've removed the Legistar Save button. You can now click the regular Save button in MS Word to save changes. When you close the document, the data is saved to Legistar.
- When you open MS Word as the text editor from within Legistar, it now opens in focus. You no longer have to click in the MS Word screen to bring it to the front.
- We've replaced the old GUID filename with the name and version of the file being edited.
- There is now a progress bar to inform you while Word is opening from within Legistar
- We've replaced the Legistar menu with a menu that includes Templates, Text Sections, and Standard Paragraphs. Note that Standard Paragraphs is a new addition to the menu (see the below figure).
- We've fixed a bug that was causing MS Word text files to overwrite other open text files.

Figure 1 Updated Word Add-ins Menu

### **Legislative Files Search Results Grid**

The Controlling Body, Agenda Date, and Department fields now display in the search results list in the Files module. You can now sort by and hide/display columns.

### **Action Text Supports [Action Name] then [File Type]**

You can now configure the Action Text variable to support [FILE TYPE] before [Action Name]. Previously, you could only place [Action Name] first.

### **Multiple Users in Edit Mode on the Same Record**

Multiple users can now see the same record at the same time, and a user can edit the record while it is being viewed by another user.

### **File Name/File Title Added to File Relationships**

We've added File Name (or File Title if the name is not filled in) to the File Relationships window; this provides you with more information about the files with which you're working.

### **Run New Legislation Text Report from Legistar**

You can now run the new Legislation Text Report from Legistar. This report supports tables, graphics, and bullets, and does not cut off text because of the 64 kb limit.

### **New Upcoming Agenda Items Report**

The Upcoming Agenda Items report now pulls items based off the date range selected at run time. You can also select the file type and body to use to generate the report. You can run this report from the Home screen.

### **BUG FIX: Changing the Header Level in Workflow Controls Causes it to Disappear from the Styles Menu**

We've changed the functionality of the Styles drop-down menu in Workflow Controls, so that the header no longer disappears when you change it.

## [Legistar 5.2.124.3 \(March Maintenance Release\)](#)

### **Defaults Have Changed When Adding a New People Record**

When you create new people records on the Main tab in the People section of Administration, the Can Be A Requestor checkbox is now blank by default, and the Email Preference field is now set to Send individual email notices by default.

### **Login Limit Field now has a Default Setting when Adding New User Accounts**

When you create a new Legistar user account, the Login Limit field is now set to 3 by default, which means you don't have to manually enter a number each time you add a new user to the system.

### **Office Members are now sorted by Sort Order rather than Office Title**

On the Office Members tab in the Bodies section of Administration, office members are now sorted by the Sort Order column by default rather than the Office Title column. In addition, the Sort Order column is now the first column displayed on all screens where this column is on the grid. This enables you to easily see their sort order.

## [Legistar 5.2.124.2 \(February Maintenance Release\)](#)

### **Approval Sequence List Updated**

We've adjusted the Approval Sequence list on the Legislative Files tab so that it no longer needs to be clicked twice to view new sequences as they are added. The list is now a uniform size, and you can scroll through the list to find the sequence you need to access.

Figure 1 New Approval Sequence List with Scrollbar

### **Restricted Bodies Are No Longer Listed for User Groups in Edit Record Mode**

If a user is a member of a user group that does not have permissions to edit meetings for a specific body, this body is no longer listed in the Agenda for the field when the user clicks New on the Calendar tab in the Agendas module. However, if the user group has permissions to view meetings for that body, the body is listed in the Agenda for the field when the user is in search mode. View and edit permissions are set for bodies by user group on the Body Security tab in the System Security section of Administration.

# InSite

## [InSite 5.2.125.11 \(November 2013 Maintenance Release\)](#)

### **eComment Popup**

The eComment pop-up window in InSite now works on iOS devices.

### **“Please Wait” message is now customizable**

You can now customize the “Please Wait” message that users see when trying to access a file or attachment that is no longer public. Contact your Granicus Account Manager or Customer Care for help with this.

### **Disabled autocomplete on the Password field**

We’ve disabled autocomplete functionality for the Password field in InSite.

## [InSite 5.2.125.9 \(September 2013 Maintenance Release\)](#)

### **HTTPS has been enabled for InSite**

InSite is now a secure site. You will be immediately redirected to https if you attempt to access the site via http.

## [InSite 5.2.124.6 \(June 2013 Maintenance Release\)](#)

### **InSite and eComment**

InSite and eComment have been enhanced so the eComment link only appears on InSite once you have published the agenda and enabled eComment in MediaManager. Also, when clicking on eComment, visitors see a new window that brings them directly to that specific meeting's agenda items rather than a listing of all meetings with eComment enabled.

### **Export Meeting Calendar to Outlook**

An **Export Calendar** widget now displays next to the meeting date for every meeting in the InSite calendar grid. This widget enables you to add a meeting from the InSite calendar to your Outlook calendar.

## [InSite 5.2.124.4 \(April 2013 Maintenance Release\)](#)

### **Numbering Attachments**

InSite attachments are now numbered, which makes them easier to read and the separation between attachments more obvious.

### **Logos on Reports**

InSite Legislation Details and Legislation Details with Text reports now display the logo of the controlling body if this logo is available. If no logo is available for the controlling body, the default logo is displayed.

### **Enhanced Calendar Search**

We've enhanced the search functionality on the Calendar tab to also search the text of agendas and minutes in PDF form.

### **Updated Reports**

We've updated InSite's reporting engine to fix a bug that was causing text to be cut off on some records at the bottom of the page.