CIVIC WEB DATABASE TRAINING
CITY COUNCIL AGENDA

June 2017

First Steps For A Council Agenda Item

- Once your department has made a decision to present an item to City Council, follow your department's initial processes. Contact the City Manager's Office to have your item placed on the *Rolling Calendar.*

- Next, if your item will require a legal document (ordinance or resolution), contact your *Attorney* with the proper information, including the tentative Council date(s) assigned by the City Manager's Office. The clerk's office will add the legal document to your item.

- Contact *Budget* if you have an item that will require a supplemental appropriation.

- Decide who will be preparing the coversheet and attachments. This process can begin at anytime using our new template. The templates for Regular Meetings and Study Sessions can be found here: http://sharepoint/CityClerk/default.aspx

Preparing your AIR
(No more Coversheets)

This is a copy of the Agenda Coversheets that we have been using. This can be used as a guide for entering your information into Civic Web.

When you enter this information into Civic Web, it creates a "coversheet" for you. We are now calling these AIR's.

AIR stands for Agenda Item Report.

Remember...

- If your item includes another department, inform the department Director

- The City Manager approves AIRs and the order of items on the agenda

- **Be prepared to answer questions at the City Council meeting**

- Items that have a second reading ordinance will be copied and updated by Lynn Valdez.

- Communicate questions to Lynn Valdez, our City Council Agenda Manager. Beverly Walker is her backup.

- *Please use the E-mail councilagendaitems@cityofloveland.org*

- *Extension 2392*

- *Or stop by the Clerk's Office with questions or feedback.*

Log Into Civic Web

- If you are logging into Civic Web for the first time, your user name is the first letter of your first name and your full last name.

- The initial password is Welcome.

- You will need to log in and change your password.

- Civic Web's portal is located on the home page: www.cityofloveland.org

- From the home page, scroll down to the bottom and click on the following logo to enter Civic Web:

- Click on Sign in on the upper right hand corner of the screen.

- After logged in, click on your user name in the upper right hand corner of the screen, select My Account.

- Update your password and click save

Add Your Item Information To The Agenda:

- On the following tabs, select Action Tracking, Tracking Lists:

- Select Add, followed by AIR-Agenda Item Report:

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- Begin by Filling out each text box on the first page of your AIR, the DETAILS tab.

- Select the *Meeting Date* that your item will be presented on

- *TO:* This column will almost always be filled in as *City Council*

- Select your *Department*, Select the *Director* of the Department and manually enter the *Presenter*. Double check the spelling of the presenter(s). List the presenters first and last names with a comma in between.

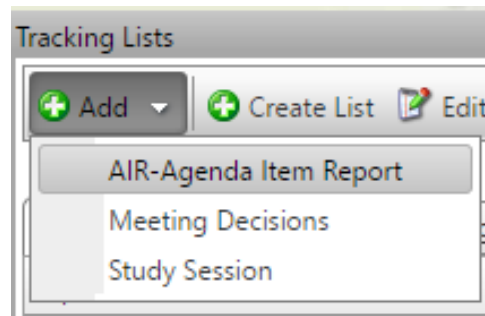- Under OPTIONS, Agenda Item, this is going to be the *Title* of your item as it would appear on the agenda. *Type your title in all caps.*

- Recommended City Council: This text box is the **Motion** that will be read at the City Council Meeting. Please use the following beginning to your motion:

A Motion To Adopt, On First Reading, An Ordinance (or A Resolution) {Insert legal description}

If the item is Information Only, enter that here under Recommended City Council:

- If a section does not apply to your item, simply type in Not Applicable. Do not leave blanks.

- Under Summary, Purpose: This item will appear on the agenda under your title and presenter information. The public will see your summary on the agenda outline form. Lynn will add information here as she finalizes your item such as the Board/Commission reviews of the item, the vote, and any financial info.

Council or Board/Commission Review

This part of the process is very important. Council requires that this information be entered on your coversheet, into the AIR and described at the end of your summary. I will describe this at the end of your summary when I finalize your AIR.

Below is an example of what I might type at the end of your summary:

This item was presented to City Council at their Regular meeting held on May 6, 2017, and the ordinance was adopted unanimously, on first reading, with a 9-0 vote.

Always include the vote count if applicable.

You may enter several meetings where this item was presented. If you run out of room, simply add them all to your History/Background section.

- IF YOU WANT TO COPY AND PASTE your information into this database, if there is a column above the section that looks like this:

You should select the clipboard, then paste your data.

PREPPING ATTACHMENTS

- List your attachments on the first page of the AIR, List of Attachments. Below is an example of a list of attachments per City Council and City Manager request:

  Ordinance
  1. Vicinity Map
  2. Staff Memo Dated May 18, 2017
  3. Flow Chart Title Dated May 17, 2017
  4. PowerPoint Pre

- *Lynn manages all of the legal documents.*

- Entering your info into Civic Web generates your AIR (coversheet), and Lynn will ensure your AIR is a part of your item.

- **Before you add attachments, Convert your attachments to *PDF* by selecting Save As and Selecting PDF next to Save as type (see photo).**

- Add the *Attachment Number* and pages numbers if applicable *centered* to your documents before you upload them.

- Click on *SAVE* at the top of the AIR before proceeding to the Attachments Tab.

SPELL CHECK!!!!!

- I highly recommend clicking on Spell Check at this point (BEFORE YOU SUBMIT THE DOCUMENT FOR APPROVAL)

- This will check every word that you entered into the AIR.
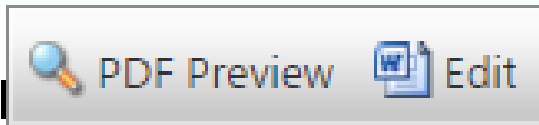
- SAVE OFTEN!!!

ADDING ATTACHMENTS

Attachments (1)

- Once you have saved your attachments on your PC, select the tab labeled *Attachments (#).*

- Select My Computer, and a pop up window titled Open will appear. Take the proper path to find your folder and document.   My Computer

- Highlight your *attachments and select open.* The database will pull in your attachments and give you a choice to update the name of the item. Title them **Att 1 or Att 2** followed by the **exact** name of the attachment on your AIR. Include dates. For example: Att 2 Planning Commission Report Dated May 8, 2017.

- Select **Update** next to the text box title of your document.

- Organize your attachments in the *order* you wish them to appear in the agenda. (Drag and Drop)

- If you need to replace an attachment, select **replace** on the row next to the attachment you need to replace, then follow the route using **My Computer** to find your document.

- Select *Save* at the top left side of your screen before continuing on to the Output Document Tab.

PUBLISHING YOUR ITEM FOR APPROVERS TO VIEW

- Before submitting your AIR for approval, you will need to publish your item so that the approvers in your selected workflow can see your document in a PDF form.

- It is much easier to edit this way.

- Go to Output Documents on your tabs, and on the left you will see a section called Publishing.

- Select the box next to PDF

- Select Item rather than location folder

- A Pop Up should be there that says Taking Item Security, say OK. This makes your document available to the Public.

- Select Publish, and once it is done working, select continue.

- If you make any changes in your AIR or attachments, you will have to republish for others to view changes.

- SAVE!!!!

Output Document

- The output document is where you will be able to preview how this item will appear.

- If you select PDF Preview, this will open a pdf document that will include your AIR and attachments.

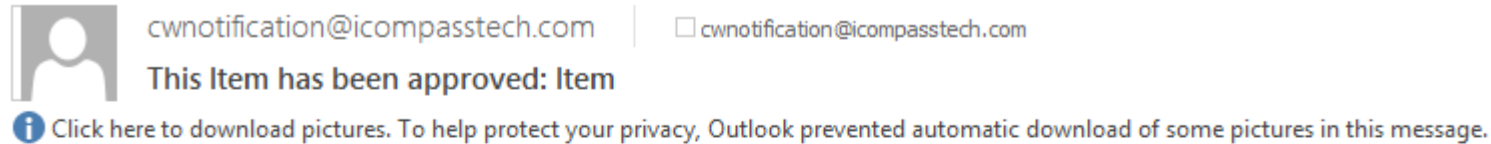- If you select Edit, this will pull up a word document of just your AIR.

- I

g these previews very carefully before continuing to the next tab, Approval/Workflow
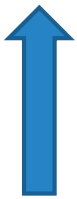
Approval/Workflow

- This is where you prepare your AIR to be approved.

- Lynn will customize as many workflows for you as you need.

- Once you have selected your approval/workflow process, click on Submit for Approval in the right hand corner of the screen.

- You should see the word PENDING in red on the left hand side of the screen.

- Click save, and close the program until you receive an Email that your item has been approved or denied. (next slide)

- Once your item has been approved or denied, you will see an Email that appears as follows:

cwnotification@icompasstech.com ☐ cwnotification@icompasstech.com

This Item has been approved: Item

ℹ Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

This Item has been approved.
This is an automated message from Loveland, CO. Please do not respond to this message.
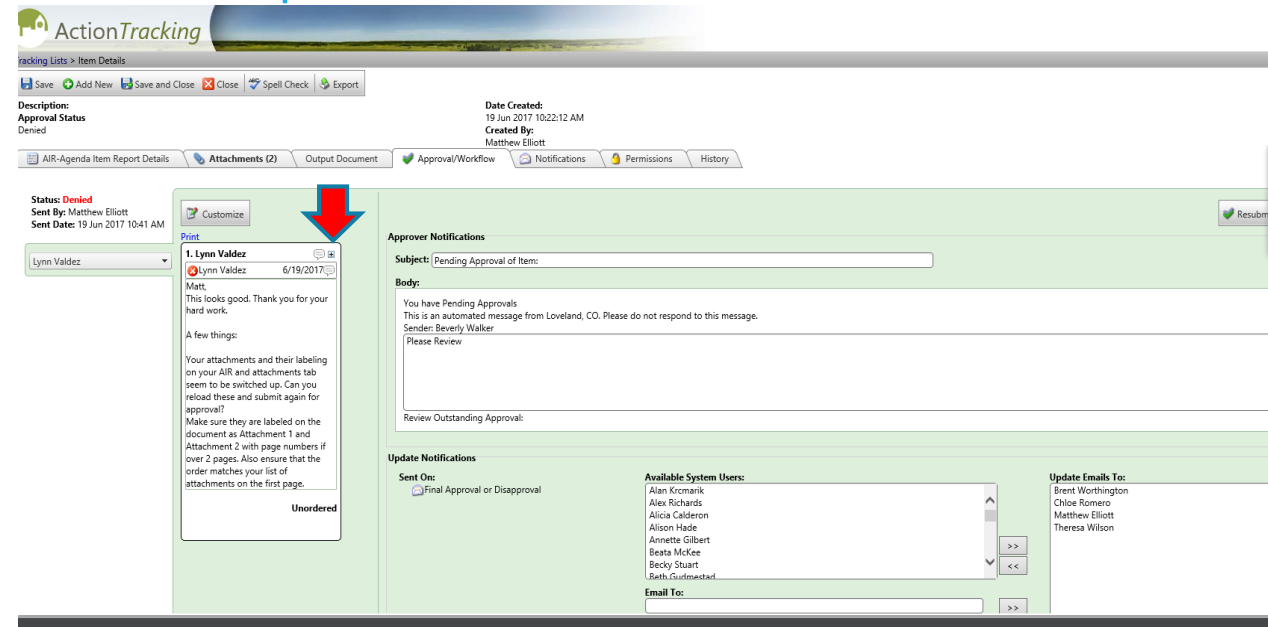Go To Item: Item

Contact Us

Click on the word Item (which now is formulated to automatically insert your item Title) in blue, and this will take you back into Civic Web and directly to your AIR.

- If your item was denied, then you can make the changes that were suggested and resubmit for approval. If an item is denied, the workflow starts over from the beginning.

- If your item was approved, select the next person that needs to approve your AIR, and so on.

- The AIR will always be submitted to Steve Adams for final approval.

- DEADLINES ARE ESSENTIAL

Your Item Has Been Denied! Or Approved!

- Once a selected approver has reviewed your item, there will almost always be comments that accompany. They may send it back and that request specific information be added.

- You need to check the comments section **every time** you receive an item back via Outlook.

- To do this, click on Item Title as shown in the previous slide, and that will take you to your item in Civic Web. (Use Google Chrome as apposed to Internet Explorer)

- On your tabs that go from left to right, select **Approval/Workflow**

- Click on the plus sign next to the approver's name as you see in the example below:

Notifications

- If you wish to communicate your AIR to someone that is not in your workflow (including outside sources), you can do that here under notifications.

- An E-mail has already been prepared for you with your AIR filled out. You can send it to yourself to see what will be sent out.

- Use this section of Civic Web just like outlook by adding a recipient, a subject, and you can include a personal message in the body.

- If you do not wish to notify, then you can skip this step and await approval of your AIR.

HISTORY

- This feature gives you the capability to view the process and information related to your item. You will be able to see when you created it, when you submitted it to for approval, what section was changed, and more.

- Go to the **History** Tab, and you can select the plus sign next to each item to expand the info.