

Public participation is invited on each agenda item prior to the Board's deliberation. **When called upon, please approach the microphone and state your name and the address where you live. Kindly limit your remarks to three (3) minutes.**

VILLAGE OF VILLA PARK
Village Hall, Cable Room
20 S Ardmore Avenue
Villa Park, IL 60181

Video Production Commission

October 14, 2019

6:00 PM

Chairman Al Stasch

Commissioners: Tom King, Robert Wagner, Laurie LoCoco and Mark Paulsen

- 1. Call to Order - Roll Call**
- 2. Public Comments on Agenda Items**
- 3. Amendments to the Agenda**
- 4. Approval of Minutes**
- 5. Business**
 - 5.a Consideration to purchase 10 new fire trucks

Amend to approve
[Map of Park](#)
[CivicaCMS_ HTML Editor \(v. 15\).pdf](#)
 - 5.b test for trianing

this is a test
[Peak Agenda Management.pdf](#)
 - 5.c test approval for training

adopt to approve xxxxxx
[Peak Agenda Management.pdf](#)
 - 5.d afdafa

fadfad
- 6. Public Comments on Non-Agenda Items**
- 7. Commissioner Comments**

- 8. Chairman Comments**
- 9. Village Board Liaison Comments**
- 10. Village Staff Comments**
- 11. Adjournment**

The Villa Park Village Hall is subject to the requirements of the Americans with Disabilities Act of 1990. An elevator is operational at the north side entrance to the Village Hall during normal work hours and also during evenings. Individuals with special needs are requested to contact the Village's Compliance Officer at (630) 834-8500 so that reasonable accommodations can be made for those persons.

Video Production Commission Agenda Item Report

Meeting Date: October 14, 2019

Submitted by: Gaby Gutierrez

Submitting Department:

Item Type: Proclamations

Agenda Section: Business

Subject:

Consideration to purchase 10 new fire trucks

Suggested Action:

Amend to approve

Attachments:

[Map of Park](#)

[CivicaCMS_ HTML Editor \(v. 15\).pdf](#)

CivicaCMS: Quick Links Module

The QuickLinks Module allows site editors to redirect page addresses to other pages, files, news stories, press releases, FAQs, info guide, and outside links. To add a QuickLink to your site follow the steps listed below; each section will guide you through the process.

Manage Quick Links

1. **Getting Started - Modules:** To begin, move your mouse over the Module tab then click "QuickLinks". Once the Quick Links module is selected, it will bring you to the "Manage QuickLinks" page (see example to right). This is main page that displays all the QuickLinks created.

2. **QuickLinks - Drop-down Menu:** Underneath the Quick- Links dropdown menu you will find two options: List All will show you the complete list of the QuickLinks. Add New QuickLink will take you to the New QuickLink page where you can create new QuickLink.



3. **Add New QuickLink Entry:** Easily create a new QuickLink article by clicking this button.
4. **QuickLink Name:** This is the name of the QuickLink. This is the name that goes after your domain name.
5. For example: www.yourdomiannname.com/quicklinkname
6. **QuickLink Type:** This is auto populated when you use the search button (#4). However, you can manually select a type from the drop-down menu.
7. **Active:** If the Quicklink is active it will be "True". Likewise, if it is "False", it is not active.
8. **Modify:** To edit an existing QuickLink, click this button.
9. **Delete:** To delete a specific QuickLink, click this button.

Create Quick Links

1. **QuickLink Name:** This is the name of the QuickLink. This is the name that goes after your domain name. For example:

www.yourdomiannname.com/quicklinkname. So a hypothetical link like this www.ci.cityname.ca.us/recycle could link to another webpage within the website, an outside webpage, a FAQ, a file in the FileBank, an InfoGuide link, a News item, or a Press Release.

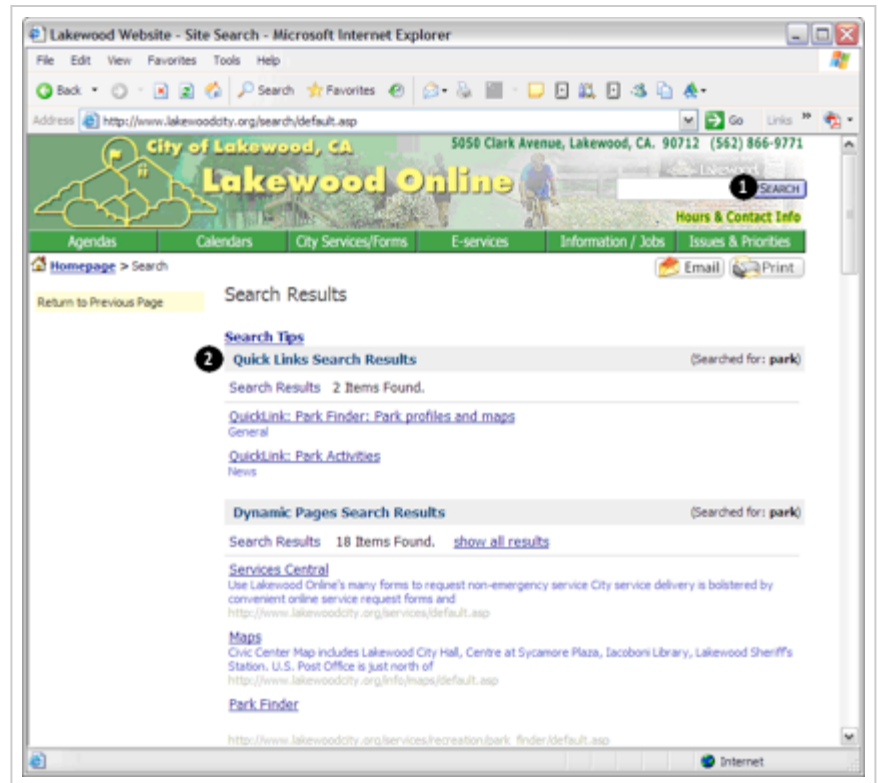
2. **QuickLink Display:** This is the name that will appear when someone searches on the global search.
3. **Search Site Data:** Enter in a keyword or phrase in the search field, then hit the search button. This will search your site and all the modules for relevant data from your keyword.
4. **QuickLink Type:** This is auto populated when you use the search button (#3). However, you can manually select a type from the drop-down menu.
 - Dynamic Pages: This will link to regular pages within the site. FAQ: This will link to a specific question in the FAQ database. FileBank: This will link to a specific file in the FileBank.
 - General: This will redirect to an external website.
 - Info Guide: This will link to specific data in the InfoGuide. News: This will link to a specific News story.
 - Press Release: This will link to a specific Press Release.
5. **Link Data / URL:** The Link Data / URL is auto populated when you use the search button (#3). However, you can add your own URL into this field. Note: if you do add a custom URL into this field, you must select the "General" tab located in the QuickLink Type above (#4).
6. **Active:** If the box is checked, then the Quicklink is active. Likewise, if it is not checked, then it will not be redirect.
7. **Submit:** This button will submit your QuickLink to the database. Once you click the submit button, a popup window will be displayed prompting you to agree to add it to the database. This is done to ensure entries are ready to be added just in case the submit button was clicked on accident prior to completing the entry.
8. **Back:** This button will take you back to the main Quicklinks application page.

Search Quick Links

1. **Site Search:** Enter in a keyword

or phrase in the main search field (the one typically located at the top of every webpage), then hit the search button.

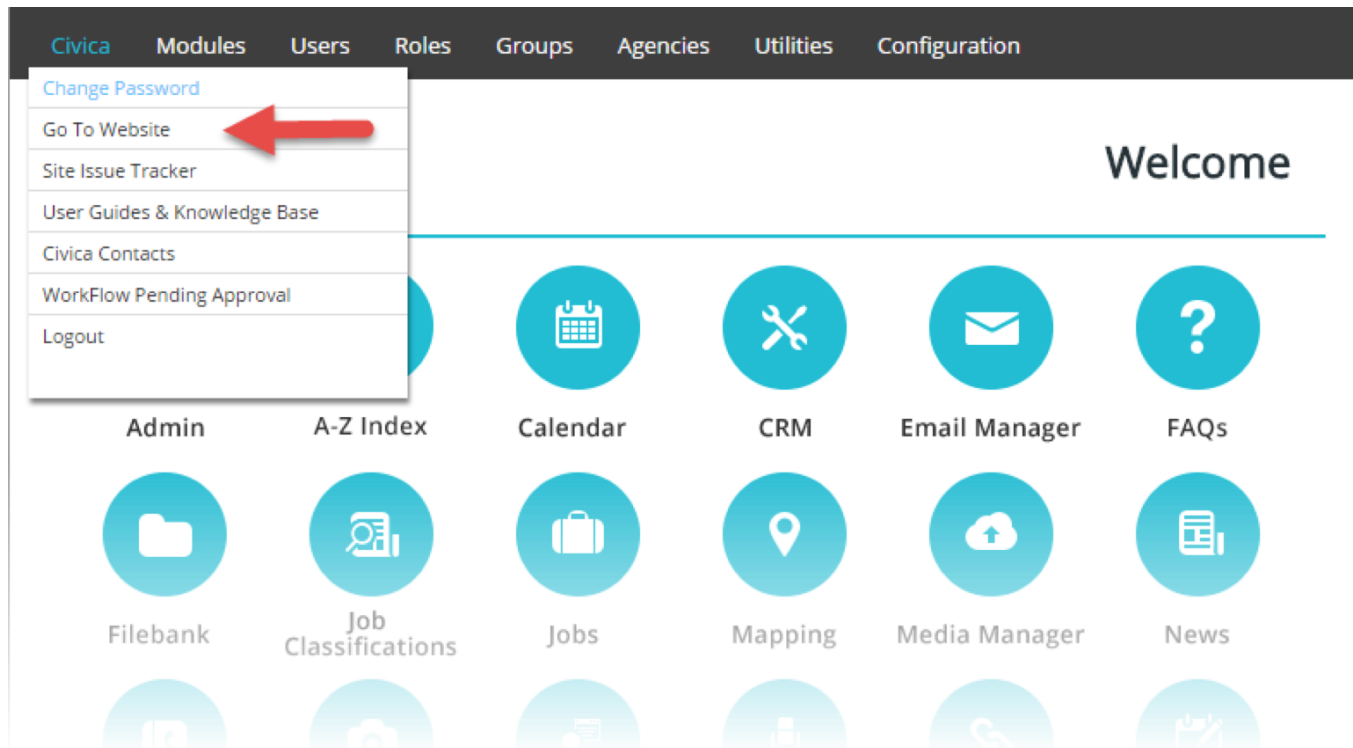
2. **Site Search Results:** Once you have entered a keyword in the search field, this will search your site and all the modules for relevant data from your keyword or phrase. For example, if you search for “Parks” in the main search field, it will display the results (see example to the right) if “Parks” is a QuickLink. If “Parks” is not a QuickLink, then no results will be displayed.



CivicaCMS: HTML Editor (v. 15)

Browsing to your Website

From the Civica Admin page, use the **Civica** menu in the upper left, and select **Go To Website**.



This launches a new browser window that brings you to the home page of your website. Use the drop-down menus to navigate to the page you'd like to edit. Since you're logged in to Administration, you'll be able to access the **edit** functions on those pages you've been assigned to. [You'll the see the edit icon only on those pages for which you have editing permissions.](#)

Note that the system will automatically log you out after a period of inactivity, and at this point you will no longer be able to see the **edit** menu. If this happens, go back to Administration and log in again, and then refresh your web page.

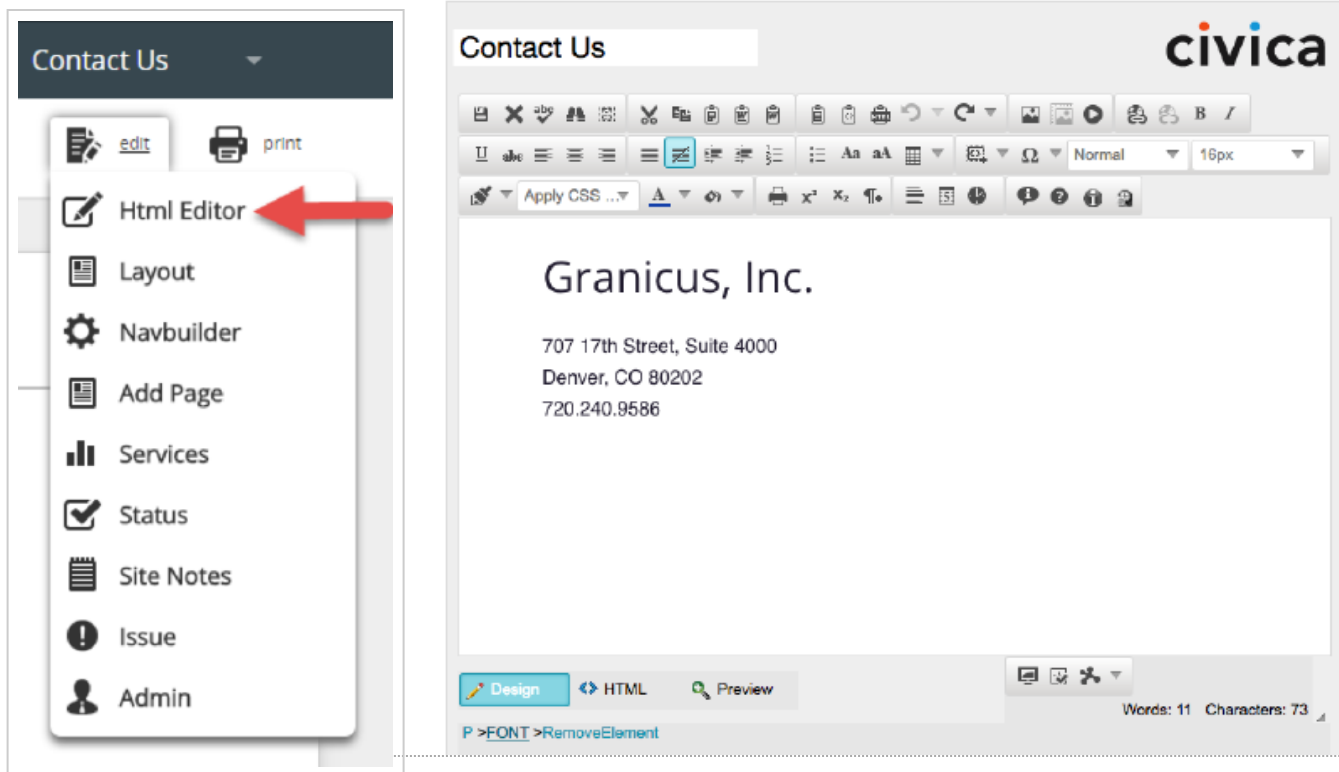
Contact Us

Granicus, Inc.

707 17th Street, Suite 4000
Denver, CO 80202
Main: 720.240.9586

Click the **edit** icon. You can also select **Html Editor** from the drop-down menu. (Some of the menu options shown below may not be available depending upon your level of permissions.)

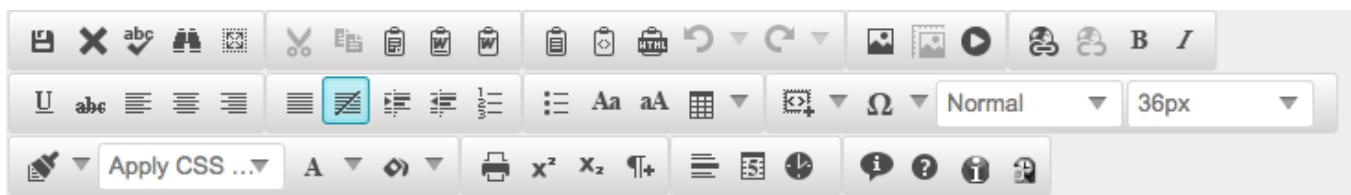
The HTML editor opens in a new browser window and enables you to make changes to your content using a WYSIWYG editor.



Note: We recommend writing your content offline in a word-processing application, then pasting it into the editor to avoid losing your content in the event of an interruption in internet service. Content that does not copy and paste well includes images, hyperlinks, and tables.

The Editor Toolbar

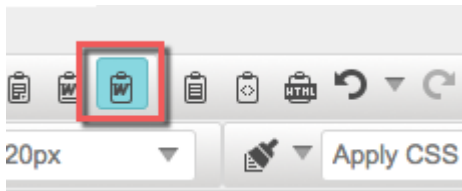
The editor toolbar consists of rows of icons along the top of the editor page, and each activates different commands or functions when clicked. Some have drop-down menus that give you additional options. Hover over each to see a short description of what it does. [Click here to view a table describing all the functions of the HTML editor.](#)



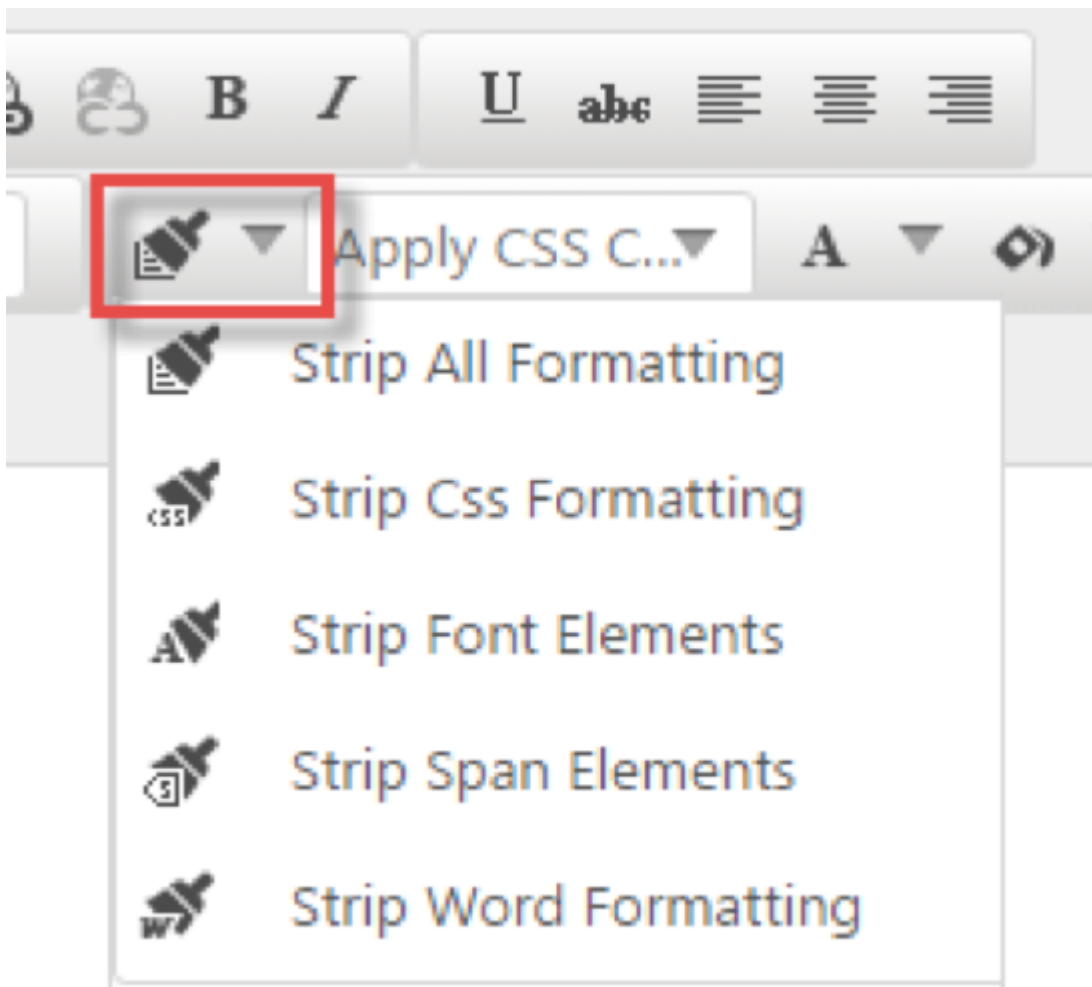
Working with Text

If you're importing text that has formatting applied from Word, we recommend using the **Paste from Word, strip font** icon in the menu, represented by the **clipboard** icon as shown below. This provides you with the cleanest content

to start with, and you can then apply formatting as needed using the [editor's commands](#). This ensures consistency across the pages in your website.

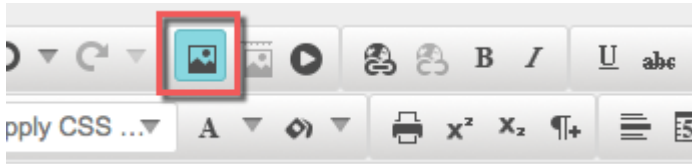


If you paste text using the keyboard shortcut **Ctrl + V**, you can clean the content by using the **Format Stripper** drop-down menu. To see the different formatting that is stripped with each option, select each in the menu in turn, starting from the bottom, to end up with the cleanest possible content. You can also select **Strip All Formatting** at the top of the menu to remove all formatting at once, but keep in mind this will strip hyperlinks, paragraph breaks, and other formatting you might wish to keep.

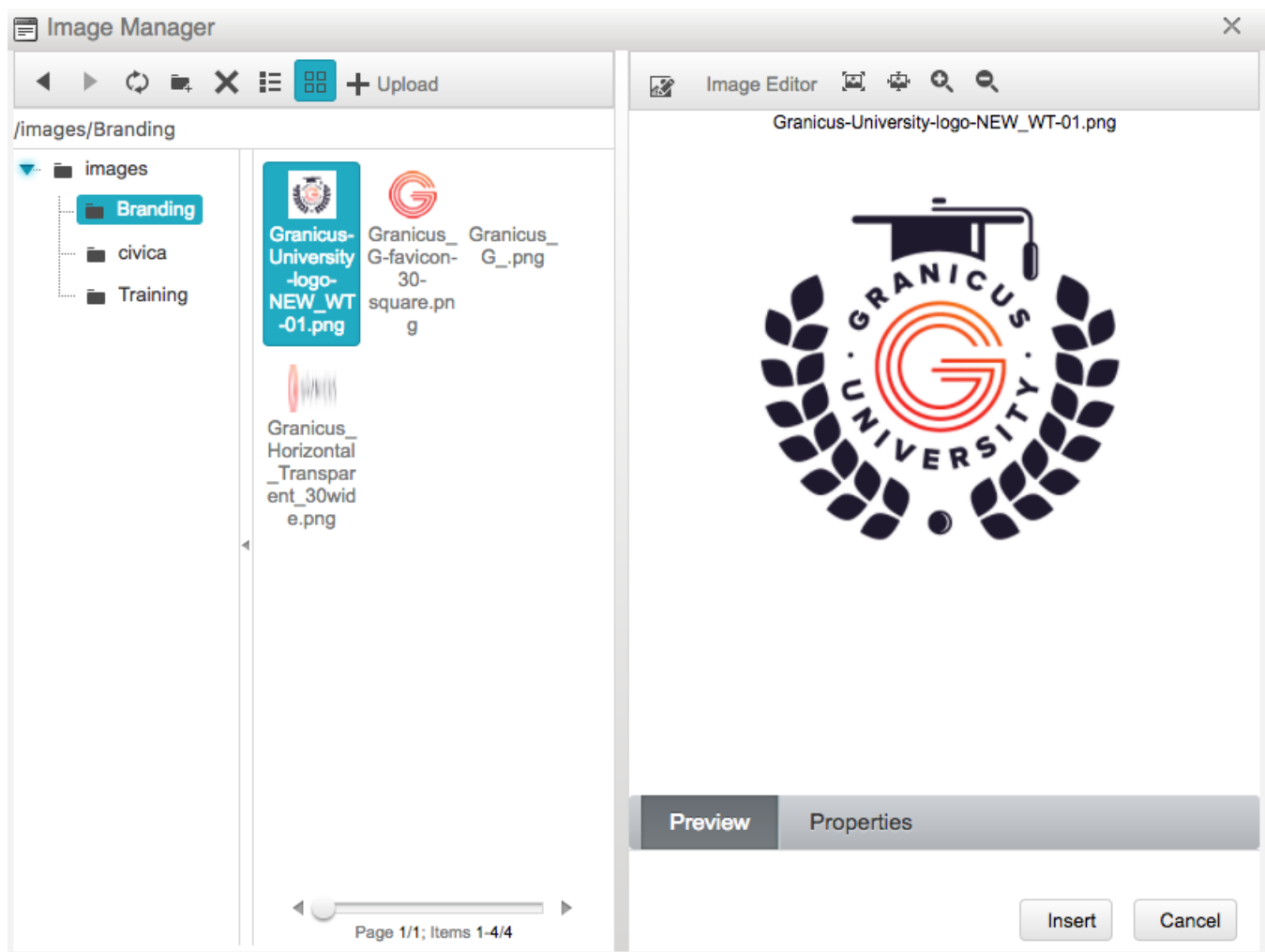


Working with Images

To begin, select the **Image Manager** icon from the menu.

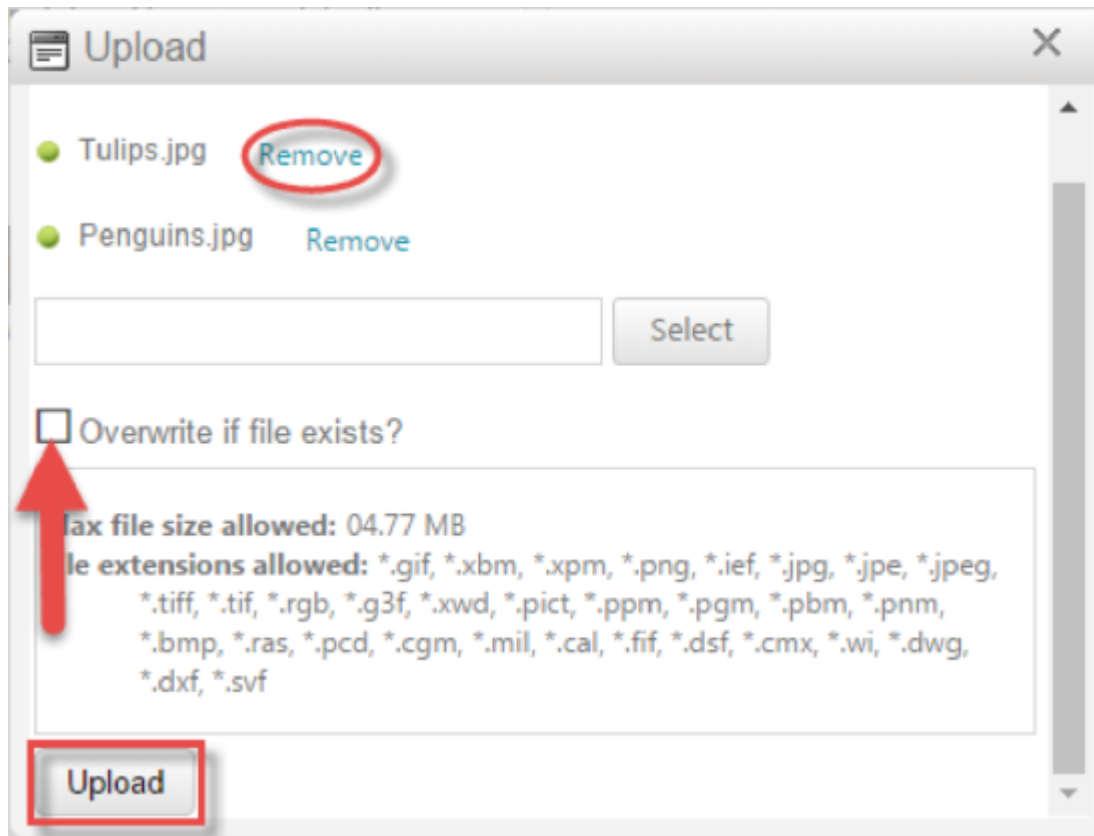


The Image Manager loads. Use the folder structure on the far left to navigate to the folder you want to browse. In the middle pane, you'll see a list of images contained within the selected folder. On the right is a preview area for the selected image. Use the **grid view** and **thumbnail view** buttons to toggle between thumbnail and grid views.



Click **+ Upload** to add images to the selected folder. The **Select** field at the top of the Upload window enables you to browse your computer for images. You can add several at a time. Click **Remove** to the right of an image's name if

you've selected it in error. Click the **Overwrite if file exists?** checkbox if you're replacing an existing image. When you've added the images you need, click **Upload** at the bottom of the upload window.

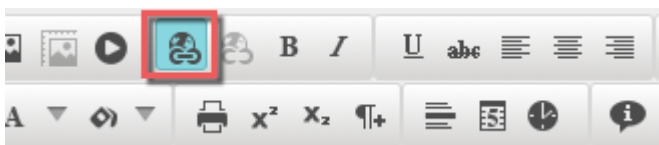


In the middle pane of the Image Manager, click the image you want to work with. Then click the **Properties** tab below the image preview. A pane of options that enable you to make fine-tuned adjustments to the image opens.

We recommend that you fill in text in the **Alt Text** and **Title Text** fields. These are helpful to users who have images turned off, and when a user hovers over an image, respectively. After you've made any necessary adjustments to the image, click **Insert** at the bottom of the window. The image displays in the HTML Editor and can be positioned and sized as needed.

Working with Hyperlinks

To create a hyperlink, place the cursor where you want the link. Press the **Shift** key on your keyboard, and use your arrow keys to select what text to include in the link. Click the **hyperlink** icon in the menu.



The Hyperlink Manager opens.

- Type the link into the **URL** field. If you're using a relative link (a link pointing within your site), delete "http://" from the field.
- The **Link Text** field populates with the text you've highlighted in the HTML editor; you can make adjustments here if necessary.
- Use the **Target** menu to select **New Window** if you want the link to open in a new browser window.
- The **Existing Anchor** menu will display the existing anchor if you're linking to one.
- In the **Tooltip** field, type the text you want to display when site visitors hover over the link.

Use the **Anchor** tab if you're [creating an anchor to specific area on the page](#), and the **E-mail** tab to [set up a link that creates an email with the address and subject filled in](#).

Press **Return** on your keyboard when you're done. The link displays in the HTML Editor window.

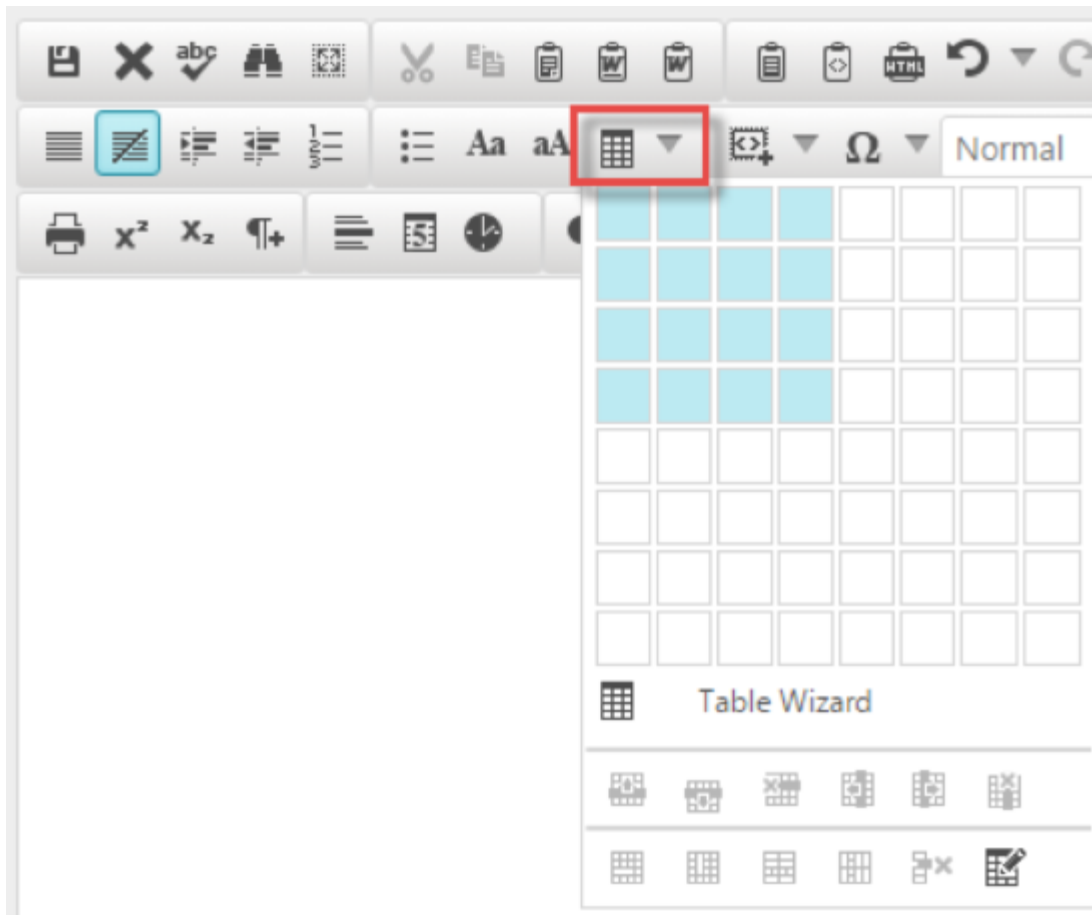
Note: You can also use the Hyperlink Manager to modify an existing hyperlink.

The screenshot shows the 'Hyperlink Manager' dialog box with the 'Hyperlink' tab active. The fields are as follows:

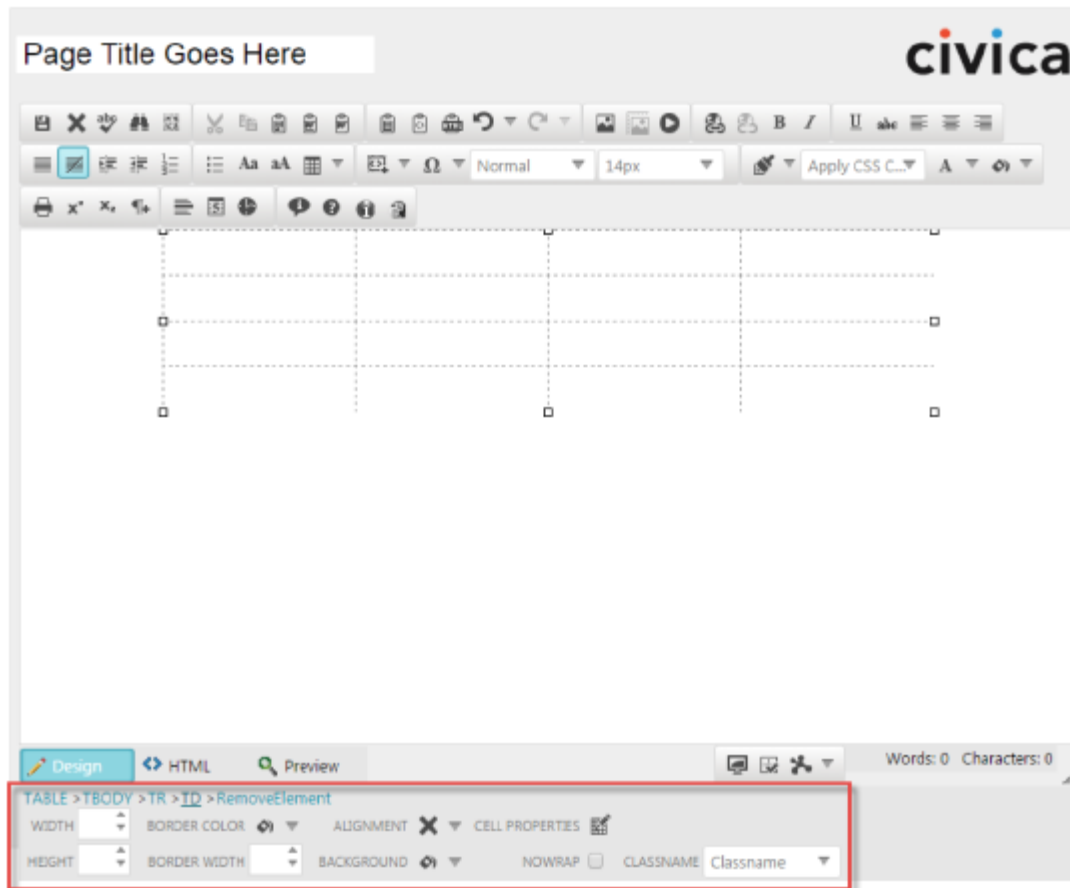
Field	Value
URL	www.granicus.com
Link Text	www.granicus.com
ID	
Target	New Window
Existing Anchor	None
Tooltip	Granicus Homepage
CSS Class	Apply Class

Working with Tables

To create a table, place the cursor within the HTML Editor's content area. Click the **table** icon in the menu. In the Table Wizard that opens, move your cursor over the squares to select how many cells tall and wide you'd like the table to be.

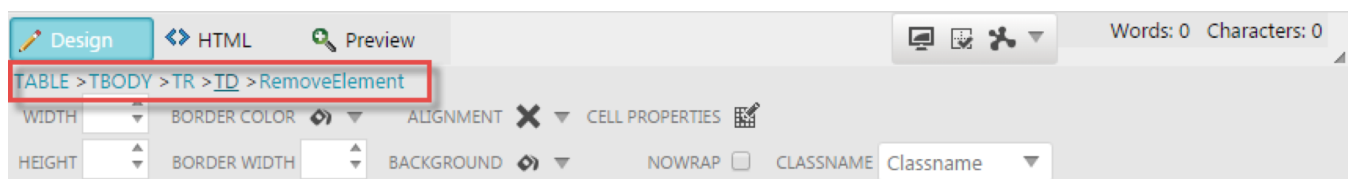


The table displays in the HTML editor with a menu of styling options at the bottom. This menu will display whenever you click within the table.



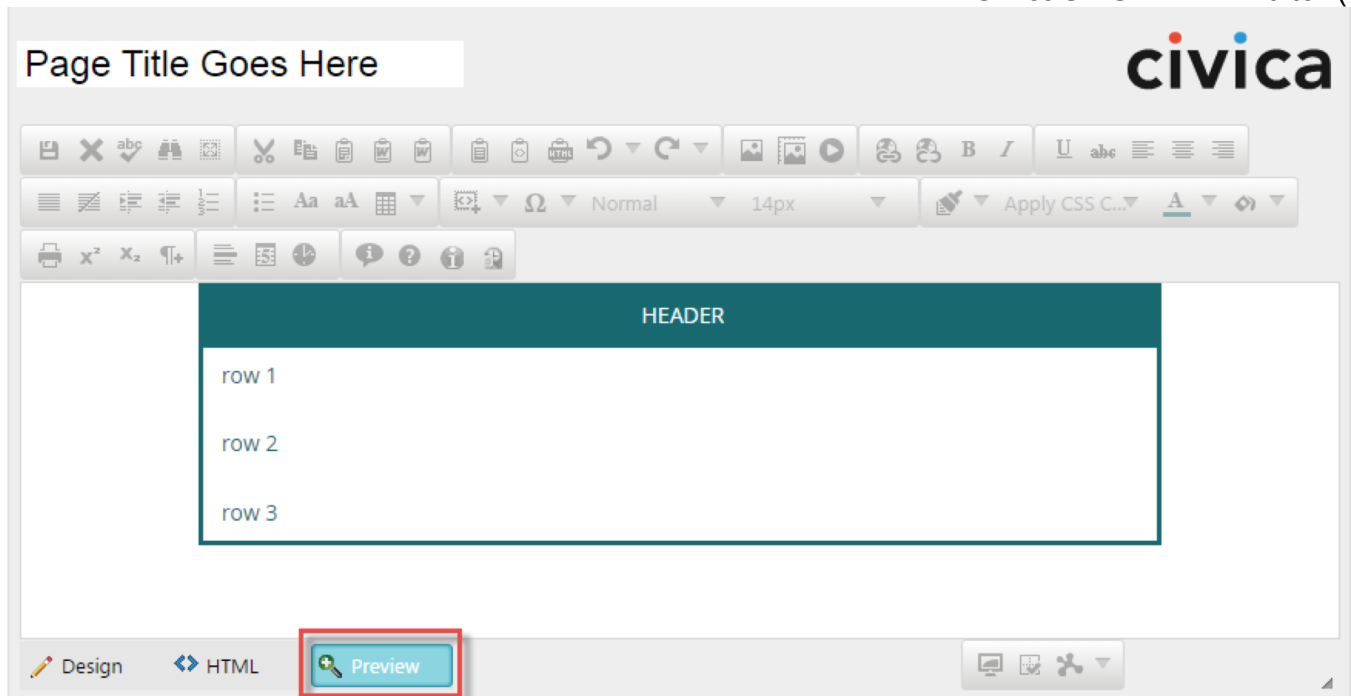
The **TABLE > TBODY > TR > TD > RemoveElement** path enables you to apply changes to the entire table or sections of it. The menu changes when you click each of these options.

- Click **TBODY** to apply edits to the entire table. You can apply a border or background and change the alignment, width, and cell spacing. A number of colors are available, or you can add custom colors using hex codes. The **width** and **height** menus by default use pixels, so if you enter “100” in the field, the selected element will be 100 pixels.
- Click **TR** to apply changes to the selected row.
- Click **TD** to apply changes to the selected cell.
- Click **RemoveElement** to remove whatever is currently selected in the menu path: a cell, row, or the entire table.



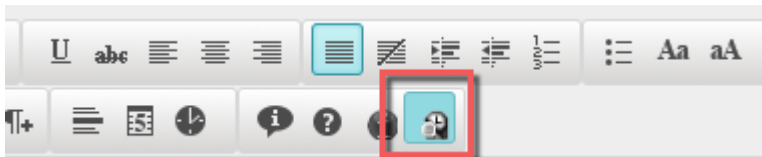
To establish a header that spans the width of the table, click a cell in the top row, click **TD** in the path, then click **RemoveElement**. Repeat this process until you have only one cell in the top row that spans the entire width of the table.

Click the **Preview** button at the bottom of the window to view the table as it will appear.



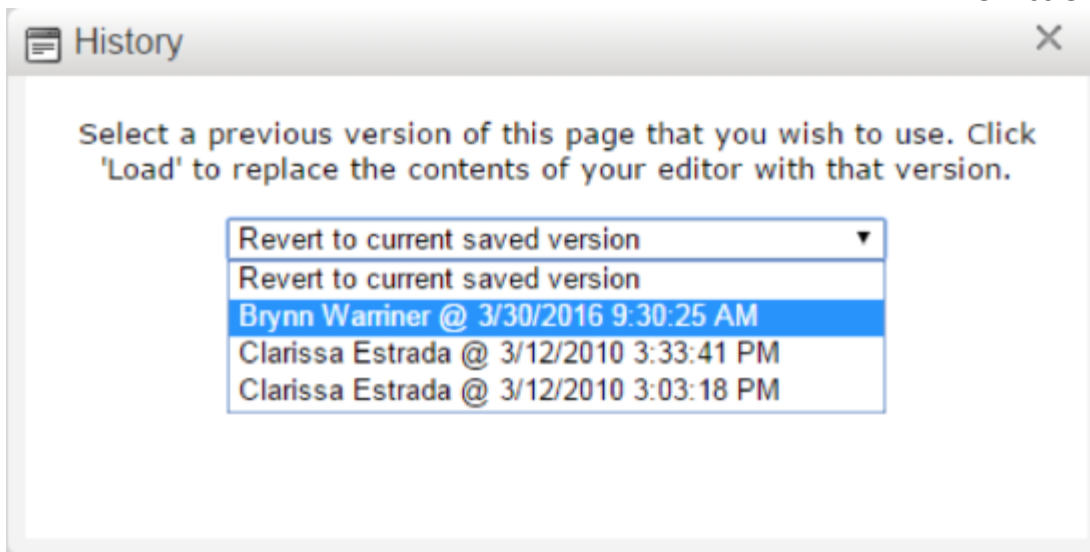
Restoring Content

If you need to go back to a previous version of the page, whether to see older content or restore due to unwanted changes, click the **Load Page History** icon.



The History window displays. The drop-down menu is populated with up to twenty previous versions of the page. Select the one you want to view, then click **Load** to load the contents in the HTML Editor. This does not automatically apply the selected version to the live web page; you can view the content and then discard it without changing your page. Click the **Save** icon if you want to revert the webpage to the currently loaded version.

This function is also useful to see which user made a given change to your page.



Saving and Keeping Your Work Safe

Before saving your work in the HTML Editor, we recommended selecting and copying the content to your computer's clipboard. If you lose internet connection or are automatically logged out of Admin before clicking **Save**, you'll be able to paste the content back into the Editor and try again. Use the keyboard shortcuts **Ctrl + A** and then **Ctrl + C** to select all content and copy it. If you need to paste the content, place your cursor within the HTML Editor, then use the shortcut **Ctrl + V** on your keyboard.

Click the **Save** icon on the Editor's menu, then click **OK** in the dialog box that pops up. The HTML Editor closes, and the webpage you were editing loads with the changes in place.

[>> Back to list of Civica topics](#)

Video Production Commission Agenda Item Report

Meeting Date: October 14, 2019

Submitted by: Joe Drafter

Submitting Department: Community Development

Item Type: Minutes

Agenda Section: Business

Subject:

test for trianing

Suggested Action:

this is a test

Attachments:

[Peak Agenda Management.pdf](#)

Peak Agenda Management

Welcome to Peak Agenda Management! Click the links below to learn more about this application.

[>>Download this guide as a PDF](#)

[Frequently Asked Questions](#)

Find the answers to common questions asked about Peak Agenda Management.

[Getting Started](#)

Here you can learn the basics of logging in and navigating the application.

[Peak Admin](#)

In Peak Admin, you'll set up meeting bodies and departments, manage users and user groups, create meeting and agenda item types, and configure your site settings. The topics on the left correspond to the sections of Admin in your Peak system. Click the links below for more information about each task.

[Peak Meetings](#)

Learn how to create and edit meetings and customize, download, and publish meeting agendas.

[Peak Agenda Items](#)

In this section, learn how to draft and edit agenda items and generate agenda packets for the public or council.

[Peak Workflow](#)

Read about Peak's Approval Workflow feature and learn how to set up and modify workflows.

[What's New in Peak](#)

Read the latest Peak Agenda Management release notes to learn about new features and changes to the application.

Peak: Frequently Asked Questions

Agenda Items

Q: How do I know if my agenda items are overdue?

A: The [Dashboard](#) will give quick access to your items. You can also go to the [Items page](#) to see all items, or use the filters to view only your items or items needing your approval.

Q: How do I add a last-minute agenda item?

A: A last-minute item can be added in the same way you [add any item](#).

Q: How does Peak track legislative history?

A: Peak does not track legislative history at this time. Legislative history is defined as historical actions, votes, or notes that are recorded on an item.

Q: What is the maximum file size for agenda item attachments?

Each attachment can be up to 200 MB in size. Most Windows- and Mac-based file types are supported. For a full list of supported file types, see the [technical solutions guide](#).. All files will be converted to PDF for packet generation.

Agendas and Meetings

Q: Once an agenda is published, can I make changes?

A: Yes, changes can be made by an [Agenda Coordinator or Peak Admin](#) after an agenda is published. However, the changes will not automatically be published, so the [agenda should be published again](#) anytime changes are made.

Q: When an is agenda final, what does clicking the padlock do?

A: A locked agenda will prevent changes from being made. Only users with the proper permissions can unlock a locked agenda.

Q: What types of reports can I create?

A: Peak supports creating a single agenda report and item cover page.

Q: Does Peak include minutes?

A: No. In order to use minutes, you would need to add our Meeting Efficiency Suite.

Q: Some of my meetings are internal only or private. Can I hide meetings from the view page/public?

A: Yes. To keep the meeting private, do not publish the meeting's agenda.

Q: What purpose does the Meeting Status serve?

A: The status controls who can see the agenda. If an agenda is in Draft status, only Agenda Coordinators and Peak Admins can see it. Once the agenda is designated as Final, Drafters can also see it.

Q: Are agendas converted to PDF before publishing?

A: Yes. Peak uses a Universal File Converter to support PDF generation.

Q: Can I have different agenda report templates for different meeting bodies?

A: Yes! Jurisdictions and organizations using Peak have the option of requesting multiple custom agenda templates. This enables you to have customized format and logo for as many meeting bodies as you need. Contact [Customer Care](#) to request your customized report templates.

Approval Workflows

Q: How do I get notifications for the items I need to approve?

A: [Notifications are automatically sent via email](#), and any approvals waiting your review will be listed on your dashboard.

Q: How do I prompt an Approver who has not yet approved an item?

A: Approvers will automatically [receive an email](#) when assigned to an approval workflow phase. Any open approvals can be accessed via the [Dashboard](#) or the [Items page](#).

Q: Can Admins set workflows so users do not have privileges to alter them?

A: Not at this time.

Q: Can an Approver make modifications to an item when they are requested to approve an item?

A: Yes. When approvers are requested to approve a file, they can also edit all the item details, as well attachments—just as the drafter can. See full details in the [release notes for this feature](#).

Installation/Deployment

Q: Is this software available only as a cloud-based solution, or can we install it on-premise as well?

Peak is available only as a cloud-based application.

Q: What is the standard timeline for successful go-live?

A: Our goal is for you to go live in 30 days or less.

Q: What is included in the training?

A: Your Peak training will include access to our interactive, self-guided training to help you familiarize your team with Peak at the beginning of your deployment. The solution then includes 3, 2-hour sessions covering administration, drafting functionality, agenda posting procedures, and review.

Q: What happens if your server goes down?

A: Our solution is designed with redundant failover to provide 99.9 percent uptime.

Integration with Other Programs

Q: How does this integrate with our other Granicus solutions?

A: Peak is a platform application, so it seamlessly integrates with MediaManager, iLegislate, LiveManager, etc.

Q: How does Peak integrate with Word? Adobe?

A: Agenda reports can be produced in Word and PDF, but there is no direct integration with Word or Adobe.

Q: Does Peak allow for the use of electronic signatures?

A: No, Peak does not support electronic signatures at this time.

Q: Does Peak have a Laserfiche Integration?

A: No, Peak does not have a Laserfiche integration at this time.

Q: Can Peak integrate with Outlook?

A: No, Peak does not integrate with Outlook at this time.

Logging In

Q: How do I set my password and log in if I don't get my Peak welcome email?

A: It's a good idea to check your spam filter. If you cannot find the email with login instructions, [check out this article](#) on an alternative way to set your password and log in.

People Records

Q: Why do I have duplicate records of something I created? For example, I created a new Person record, and now there are two people with the same name.

A: A duplicate record can be inadvertently created throughout Peak if the **Save** button is double-clicked. It is necessary to click **Save** only once. If you have created an extra record that you don't need, it can be deleted using the **trash can** icon.

Q: Why do I have a blank Person record?

A: If applications with duplicate emails are submitted using the Quick Add feature in Boards and Commissions, corresponding blank people records are created in Peak. Blank or "null" records can be deleted using the **trash can** icon.

Q: How do I change a user's password?

A: A system administrator must perform this action by navigating to the **Apps** menu in the upper right-hand corner of the page, selecting **Users and Groups**, then selecting **Edit** from the **Actions** drop-down menu next to a user's name.

Pricing

Q: How do we get information on pricing?

Pricing is based on population tiers. Please contact your Granicus Account Executive for more information.

Q: Do you offer different packages? For instance, I need this for only two meeting bodies.

A: No. The price is population-based, and once you have Peak, it can be used for as many meeting bodies as you like.

Roles/User Permissions

Q: What different roles/levels of user permissions does Peak have?

A: Peak has the following [user roles](#):

- **None:** No permission in the system; for users who need to approve items only
- **View Only:** Users can view items in the system in read-only mode, and they can approve items assigned to them
- **Drafter:** Full permission on agenda items and approval workflows
- **Agenda Coordinator:** Inherits Drafter permissions, plus full permissions on meetings and agendas
- **Peak Admin:** Full control over the entire application and access to the Admin portion of the application

Q: Can someone have multiple roles to support their participation in multiple meeting bodies?

Each user has only one role that is applied throughout Peak. You can [assign a role collectively to all members of a group](#), but it is important to note that a user's individual role assigned on the **People** tab takes precedence over a group role assignment. For users that are assigned to more than one group, the user will have the highest permission level assigned to any group they are a member of.

Q: I assigned a group role, but the role did not apply to everyone in the group. Why not?

A: If a user has an individual role already assigned, that overrides any group role subsequently applied. To change an individual role, go to **Admin > People > Manage People > Users**. Click the **pencil** icon next to the user whose role you wish to edit, then choose a new role from the **Change Role** drop-down menu.

Supported File Types and Screen Resolutions

Q: Can I use Microsoft Surface to access Peak?

A: Yes, the Surface's screen resolution is supported. See the [Peak technical solutions guide](#) for a list of supported screen resolutions.

Q: Can I upload any file type?

A: You can upload plain text, Microsoft Office, PDF, and image files. For a full list of supported file types, see the [technical solutions guide](#).

Troubleshooting

Q: Why can't I delete my agenda items or meeting statuses?

A: Be sure that you do not have dialog boxes turned off in your browser. Deletion functionality in Peak uses dialog boxes as confirmation, and if you've prevented dialog boxes, nothing will happen when you click **Delete**.

[Return to Peak help topics](#)

Peak Agenda Management: Admin

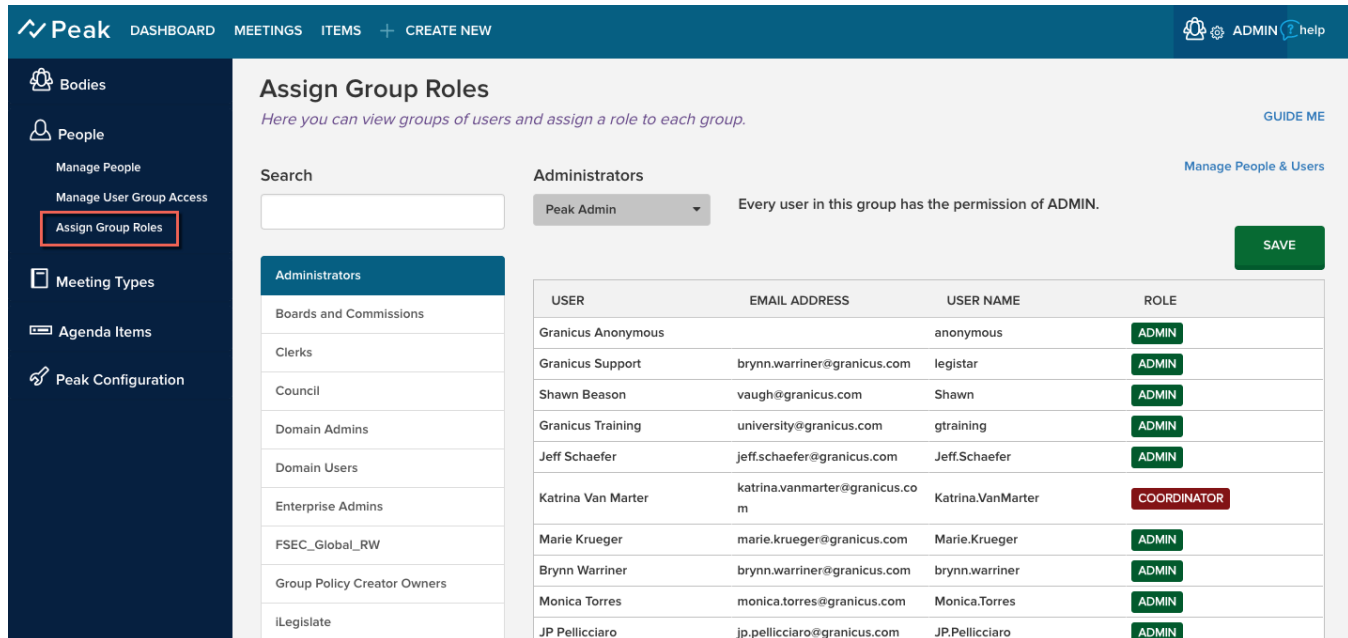
In Peak Admin, you'll set up meeting bodies and departments, manage users and user groups, create meeting and agenda item types, and configure your site settings. The topics on the left correspond to the sections of Admin in your Peak system. Click the links below for more information about each task.

Bodies	Creating Departments
	Creating Meeting Bodies
People	Creating and Managing People
	Role Definitions
	Managing User Group Access
Meetings	Assigning Group Roles
	Creating Meeting Types
	Creating Meeting Statuses
Agenda Items	Creating Item Types
	Customizing Agenda Item IDs
	Customizing the Item Template
Configuring Peak	Managing Workflow Approvals
	Configuring Site Information
	Site-wide Settings

Assigning Group Roles in Peak

The Assign Roles page allows you to take a [group from the Granicus Platform](#) and quickly assign a [Peak role](#) to the entire group, giving all members of the group the selected permission level.

To work with group roles, click **Admin** in the upper right-hand corner. Choose **People** from the menu on the left, then select **Assign Group Roles**. You can also access this page by clicking Assign Roles in the upper right-hand corner of the [Manage People](#) page. **Note:** Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Assign Group Roles
Here you can view groups of users and assign a role to each group.

GUIDE ME
Manage People & Users

Search:

Administrators: Peak Admin (dropdown) | Every user in this group has the permission of ADMIN.

SAVE

USER	EMAIL ADDRESS	USER NAME	ROLE
Granicus Anonymous		anonymous	ADMIN
Granicus Support	brynn.warriner@granicus.com	legistar	ADMIN
Shawn Beason	vaugh@granicus.com	Shawn	ADMIN
Granicus Training	university@granicus.com	gtraining	ADMIN
Jeff Schaefer	jeff.schaefer@granicus.com	Jeff.Schaefer	ADMIN
Katrina Van Marter	katrina.vanmarter@granicus.com	Katrina.VanMarter	COORDINATOR
Marie Krueger	marie.krueger@granicus.com	Marie.Krueger	ADMIN
Brynn Warriner	brynn.warriner@granicus.com	brynn.warriner	ADMIN
Monica Torres	monica.torres@granicus.com	Monica.Torres	ADMIN
JP Pellicciaro	jp.pellicciaro@granicus.com	JP.Pellicciaro	ADMIN

Next, select the group you would like to modify from the list on the left. You can use the **Search** field at the upper left to quickly find a group. Once you click the group name, the group's members show up in a list on the right side of the page. Click the drop-down menu to select which [role—or level of permission](#)—you want the members of this group to have:

MEETINGS ITEMS + CREATE NEW

ADMIN chat

Assign Group Roles

Here you can view groups of users and assign a role to each group. [GUIDE ME](#)

[Manage People & Users](#)

Search

Administrators

Boards and Commissions

Clerks

Council

Domain Admins

Domain Users

Enterprise Admins

FSEC_Global_RW

Group Policy Creator Owners

Boards and Commissions

None

None

View Only

Drafter

Agenda Coordinator

Peak Admin

Albert Einstein

Every user in this group has the permission of NONE.

SAVE

EMAIL ADDRESS	USER NAME	ROLE
ldanes@elearning.com	ldanes	NONE
kens@granicus.com	KennethS	NONE
brynn@gmail.com	Albert.Einstein	ADMIN
Jeff.Schaefer	jeff.schaefer@granicus.com	ADMIN
brynn.warriner@granicus.com	brynn.warriner	ADMIN
jessica@granicus.com	jessica	NONE
cmorton@granicus.com	Cynthia.Morton	COORDINATOR
kens@granicus.com	KenS	NONE
jhenderson@granicus.com	jhenderson	COORDINATOR

Note: A user with an individual role assigned will not update to the role assigned the group, as the individual permissions overrides the group role. Also, if a user belongs to more than one group with assigned roles, the highest ranking role will apply to that user.

Click the green **Save** button at the upper right to save the role you have applied to this group.

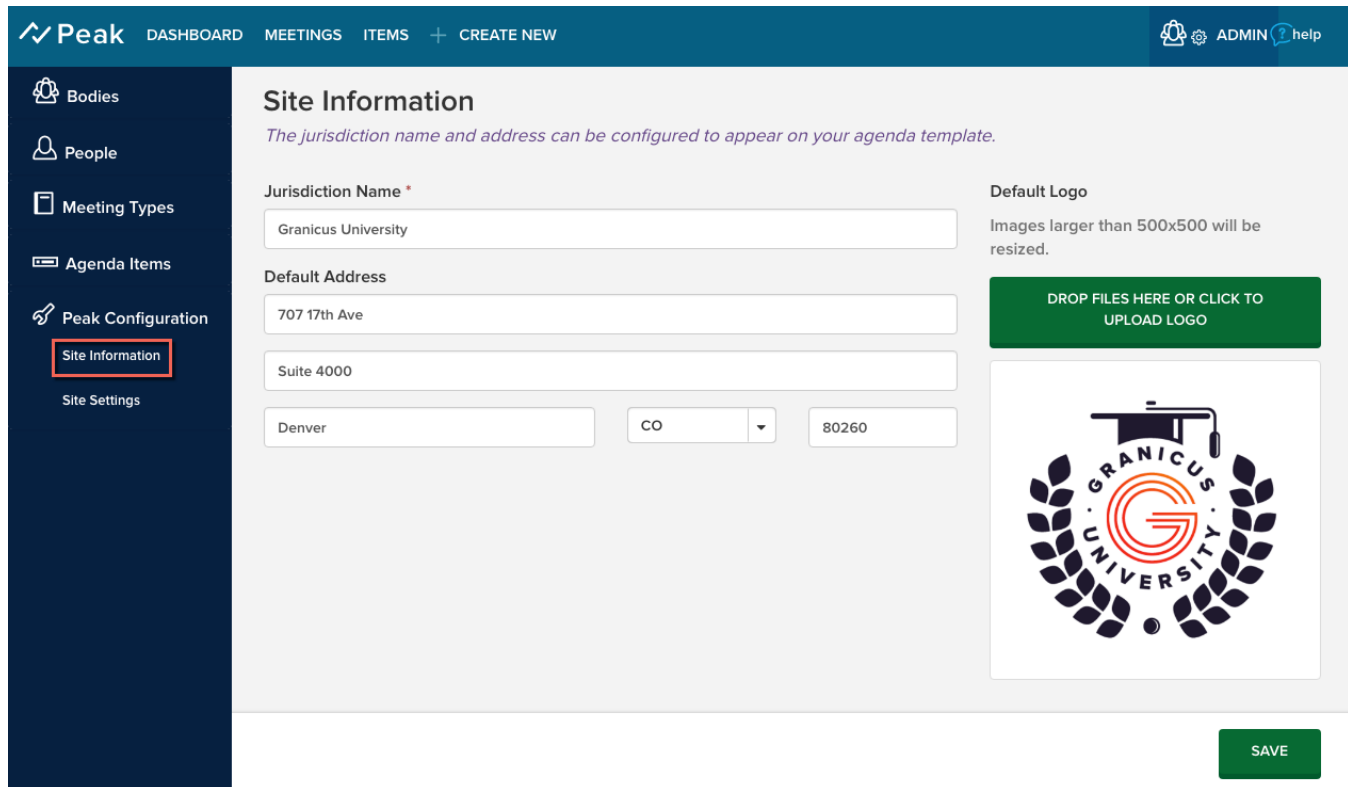
[<<< Previous: Managing User Group Access](#)

[>>> Next: Creating Meeting Types](#)

[Return to Peak help topics](#)

Configuring Site Information in Peak

Peak allows you to configure basic site information as it relates to your jurisdiction. To enter your organization's information, click **Admin** in the upper right-hand corner of the Peak dashboard. Choose **Peak Configuration** from the menu on the left, then select **Site Information**. Note: Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Peak DASHBOARD MEETINGS ITEMS + CREATE NEW ADMIN help

Site Information
The jurisdiction name and address can be configured to appear on your agenda template.

Jurisdiction Name *

Default Address

Default Logo
 Images larger than 500x500 will be resized.
 DROP FILES HERE OR CLICK TO UPLOAD LOGO



SAVE

Now you can enter the details for your jurisdiction. Click the green **Save** button at the bottom to store your information.

Field	Action
Jurisdiction Name	Click the field, then enter your jurisdiction name.
Address	Click the fields, then enter address details as needed.
Default Logo	Click the Drop Files Here or Click to Upload Logo button, then choose a file from your local computer or network to upload. You can also drag an

image file over the **Drop Files Here or Click to Upload**

Logo button. **Note:** If an image is added, it is auto-saved and cannot be deleted. You can, however, update the image/logo at any time.

Allowed file types for image upload are as follows: JPEG, JPG, PNG

[<<< Previous: Managing Workflow Approvals](#)

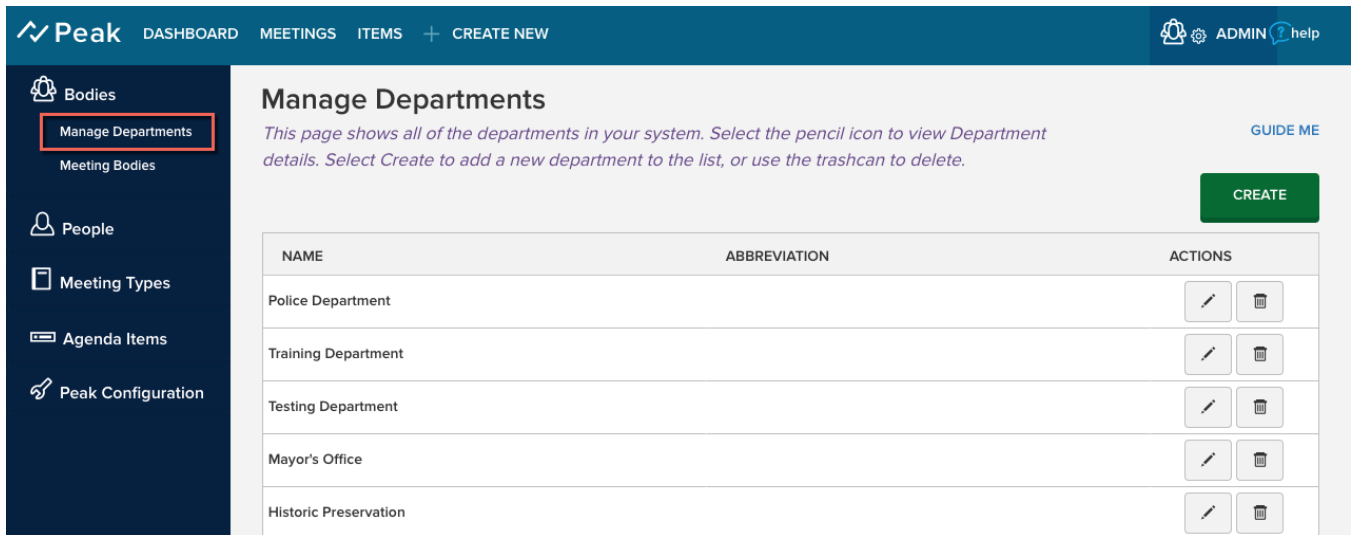
[>>> Next: Site-wide Settings](#)

[Return to Peak help topics](#)

Creating Departments in Peak

Departments in Peak are used to track from where agenda items are submitted in the agenda process. The **Manage Departments** page displays existing departments set up in Peak.

To work with departments, click **Admin** in the upper right-hand corner. Choose **Bodies** from the menu on the left, then select **Manage Departments**. Note: Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Manage Departments

This page shows all of the departments in your system. Select the pencil icon to view Department details. Select Create to add a new department to the list, or use the trashcan to delete.

[GUIDE ME](#)

[CREATE](#)

NAME	ABBREVIATION	ACTIONS
Police Department		 
Training Department		 
Testing Department		 
Mayor's Office		 
Historic Preservation		 

From here, you can edit, delete, or create departments.



To edit a department's details, click the **pencil** icon.



To delete a department, click the **trash can**.



To create a new department, click the **Create** button.

The **Create** button will take you to the Department Details page. A list of existing departments appears on the left. To search for a specific department, enter the name in the **Search** field. To edit a department's details, click the name of any department in the list. To create a department from scratch, enter the details in the fields on the right side of the screen.

Search

Peak Team Department

Planning and Zoning

Public Works

Training Team

You can add a new department here.

Create

Name *

This is a required field

Abbreviation

Description

Contact

Please select a contact person

CANCEL

SAVE

Enter details for the new department. **Name** is the only required field:

Field	Action
Name	Click within the field, then enter the name of this department.
Abbreviation	Click within the field, then enter an abbreviation.
Description	Click within the field, then enter a short description of the department.
Contact	If you want to designate a contact person* for the department, select a name from the drop-down menu.

*This list is populated by the [People records in Peak](#), which includes pre-existing applicant and people records from the Boards & Commissions application as well as records set up in Peak. You can also leave this field blank and add a contact name later by editing the department's details.

Click **Save** at the bottom right to save the new department to the system. The department now displays in the list.

[<<< Previous: Navigating Peak](#)

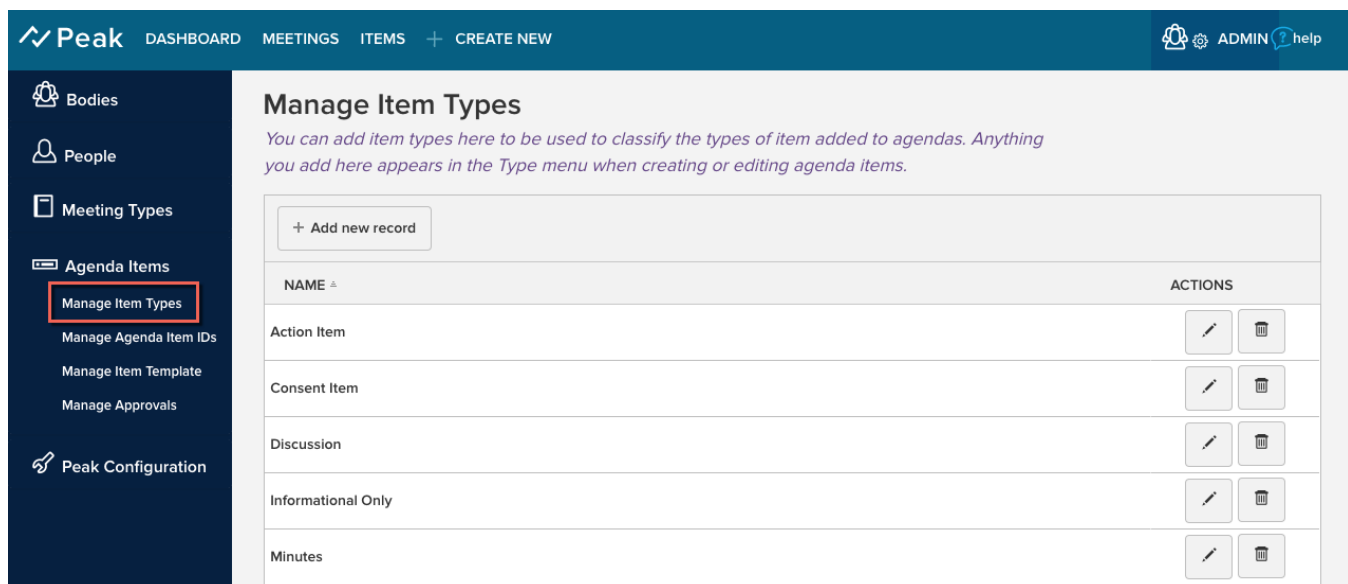
[>>> Next: Creating Meeting Bodies](#)

[Return to Peak help topics](#)

Creating Item Types in Peak

The Manage Item Types page enables you to create and manage agenda item types. You can create as many different types as you need.

You will use item types to categorize the agenda items you create. To work with item types, click **Admin** in the upper right-hand corner. Choose **Agenda Items** from the menu on the left, then select **Manage Item Types**. Note: Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Manage Item Types

You can add item types here to be used to classify the types of item added to agendas. Anything you add here appears in the Type menu when creating or editing agenda items.

+ Add new record

NAME ^	ACTIONS
Action Item	 
Consent Item	 
Discussion	 
Informational Only	 
Minutes	 

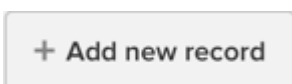
From here, you can edit, delete, and create new item types.



To edit an item type, click the **pencil** icon.



To delete an item type, click the **trash can**.



To create a new item type, click the **Add new record** button.

When you click Add new record or the **pencil** icon, you will get a field in which you can enter or edit the item type's name.

+ Add new record

NAME	ACTIONS
	✓ Update ⌕ Cancel

Click the blue **Update** button to save your new item type or the changes you have made.

Note: You will not be able to delete an item type that is in use by even one agenda item in the system. You can see a list of all items using a given agenda item type on the Items page; all of these items must be changed to another agenda item type before the original item type can be deleted.

<<< Previous: Creating Meeting Statuses

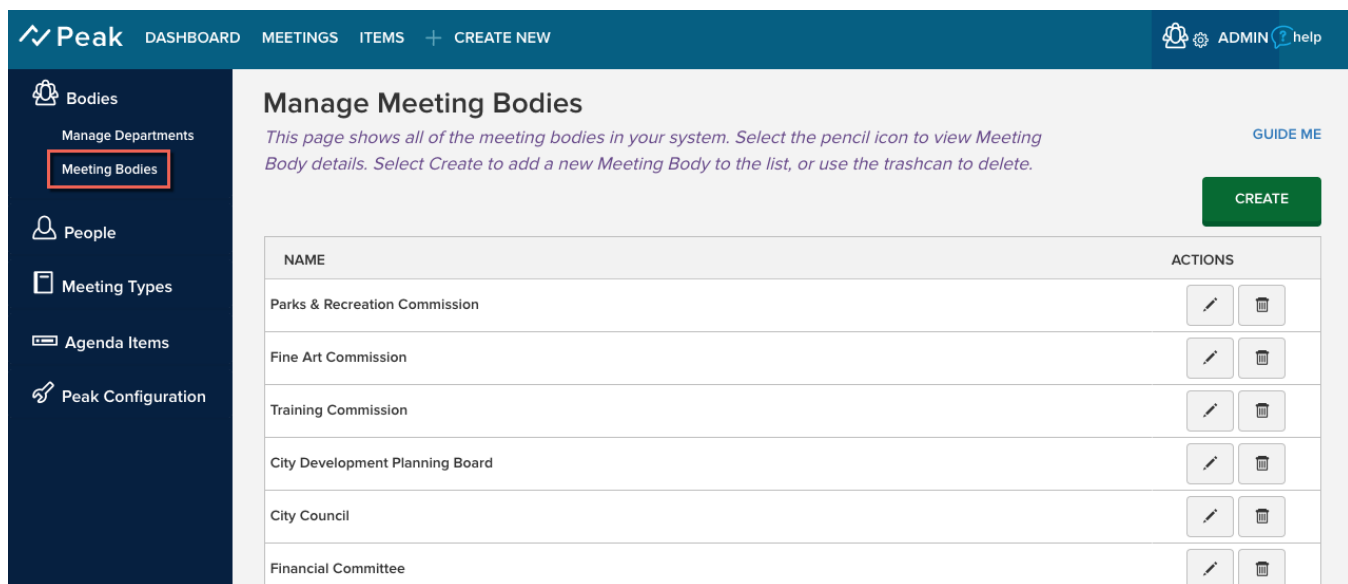
>>> Next: Customizing Agenda Item IDs

[Return to Peak help topics](#)

Creating Meeting Bodies in Peak

Meeting Bodies in Peak are the groups of elected or appointed officials that conduct public and non-public meetings. The Manage Meeting Bodies page displays existing meeting bodies set up in Peak.

To work with meeting bodies, click **Admin** in the upper right-hand corner. Choose **Bodies** from the menu on the left, then select **Manage Meeting Bodies**. Note: Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Manage Meeting Bodies

This page shows all of the meeting bodies in your system. Select the pencil icon to view Meeting Body details. Select Create to add a new Meeting Body to the list, or use the trashcan to delete.

[GUIDE ME](#)

CREATE

NAME	ACTIONS
Parks & Recreation Commission	 
Fine Art Commission	 
Training Commission	 
City Development Planning Board	 
City Council	 
Financial Committee	 

From here, you can edit, delete, or create meeting bodies.



To edit a meeting body's details, click the **pencil** icon.



To delete a meeting body, click the **trash can**.*



To create a new meeting body, click the **Create** button.

The **Create** button will take you to the Meeting Bodies Details page. A list of existing meeting bodies appears on the left. To search for a meeting body, enter the name in the **Search** field. To edit a meeting body's details, click the name of any meeting body in the list. To create a new meeting body, enter the details in the fields on the right side of the screen. **Meeting Name** is a required field:

Manage Meeting Bodies

Search

City Council

City Development Planning Board

City Event Commission

Civil Service Board

Election Commission

Financial Committee

Fine Art Commission

Historic Preservation Commission

License and Variance Board

Parks & Recreation Commission

Planning Commission

Public Art Commission

Small Business Council

Training Commission

You can add a new meeting body here.

Creating

Meeting Body Name *

Please enter a Meeting Body Name

This is a required field

Abbreviation

Default Meeting Type

Please select a meeting type

Default Meeting Location

Default Meeting Location

Default Meeting Time

5:30 PM

Contact Person

Please select a contact person

Description

CANCEL

SAVE

Enter details for the new meeting body:

Field	Description
Meeting Body Name	Click the field, then enter the name of the meeting body.
Abbreviation	Click the field, then enter an abbreviation.
Default Meeting Type	Choose a meeting type from the drop-down menu. Read more about creating and managing meeting types.

Default Meeting Location	Click the field, then enter the name of the room or chambers where this body will typically meet. This can be changed for individual meetings as needed. This field can contain multiple lines and has a one-thousand-character limit.
Default Meeting Time	Click the clock () and select a time. You can also type directly in the Default Meeting Time field. This is set up as a 12-hour clock; be sure to use the format H:MM AM/PM for single-digit hours and HH:MM AM/PM for double-digit hours, leaving a space between the minutes and AM/PM designation.
Contact Person	If you want to designate a contact person* for the meeting body, select a name from the drop-down menu. *This list is populated by the People records in Peak , which includes pre-existing applicant and people records from the Boards & Commissions application as well as records set up in Peak. You can also leave this field blank and add a contact name later by editing the department's details.
Description	Click the field, then enter a short description of this meeting body.
Member Size	Click the arrows to increase or decrease the number of members for this body. You can also type directly in the Member Size field.
Color Palette	Click on any color to associate it with the meeting body. Meetings for this body will show up on the calendar in this color, helping you quickly identify them. If a color is not selected for a body, any meeting created for it will default to gray on the calendar.

Click **Save** at the bottom right to save the new meeting body to the system. The meeting body now displays in the list.

Note

Peak meeting bodies are saved behind the scenes as boards in Granicus's Boards & Commissions application. When attempting to delete a meeting body from Peak, you'll be prompted to confirm or cancel the deletion. This helps to prevent deletion of corresponding boards in Boards & Commissions. In addition, deleting a meeting body from Peak is not allowed if the meeting body has been used for any meetings in the system.



Warning: If you have the Boards and Commissions application, deleting this meeting body in Peak will delete it in both applications. Are you sure you want to delete this meeting body?

YES, DELETE

NO, CANCEL

[<<< Previous: Creating Departments](#)

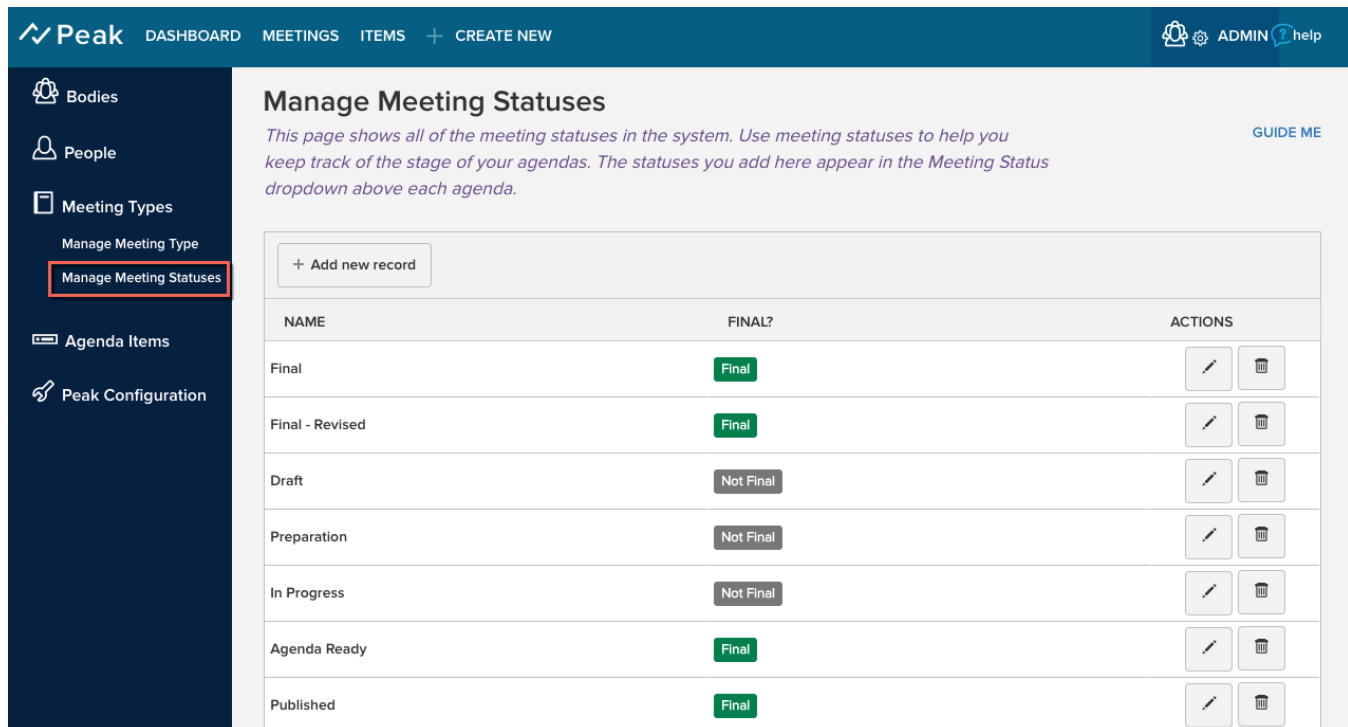
[>>> Next: Creating People](#)

[Return to Peak help topics](#)

Creating Meeting Statuses in Peak

The Manage Meeting Statuses page is where you create and manage the statuses that get assigned to agendas. You'll be able to select and apply these statuses to the agendas, and they will also display on the meeting cards on the left side of the [Meetings page](#). You can use statuses to [control who can view](#) agendas.

To work with meeting statuses, click **Admin** in the upper right. Select **Meeting Types** from the menu on the left, then choose **Manage Meeting Statuses**. Note: Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Manage Meeting Statuses

This page shows all of the meeting statuses in the system. Use meeting statuses to help you keep track of the stage of your agendas. The statuses you add here appear in the Meeting Status dropdown above each agenda.

[GUIDE ME](#)

[+ Add new record](#)

NAME	FINAL?	ACTIONS
Final	Final	 
Final - Revised	Final	 
Draft	Not Final	 
Preparation	Not Final	 
In Progress	Not Final	 
Agenda Ready	Final	 
Published	Final	 

The status of the agenda determines who has access to view it. If an agenda is in not-final status, only Agenda Coordinators and Peak Admins can view it, while Drafters cannot. If the agenda is final, Drafters can view it as well.



To edit a status, click the **pencil** icon.



To delete a status, click the **trash can**.

+ Add new record

To create a new status, click the **Add new record** button.

Click the **Name** field and type a name for the new status. If you want the status to be in the Final category, select the checkbox to the right of the name.

+ Add new record

NAME	FINAL?	ACTIONS
Final - Revised	☐	✓ Update ⌂ Cancel
Final	Final	
Published	Final	
Draft	Not Final	

Click the blue **Update** button to save your new status, or click **Cancel** to discard it.

[<<< Previous: Creating Meeting Types](#)

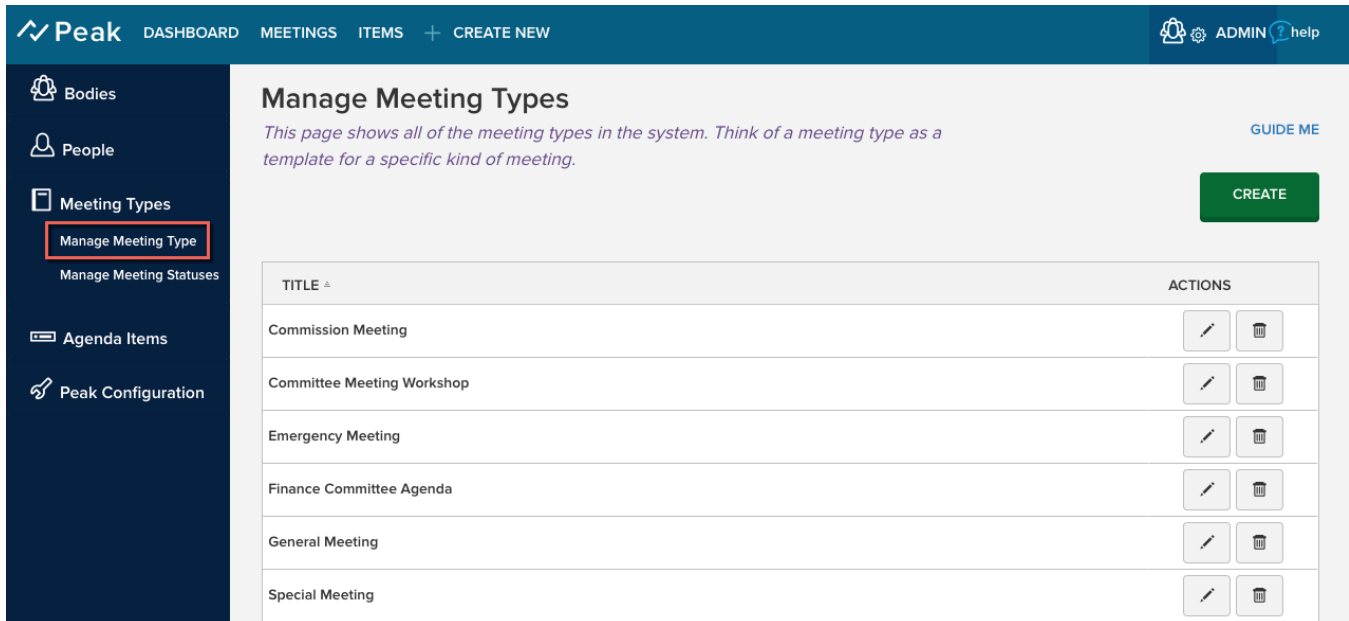
[>>> Next: Creating Item Types](#)

[Return to Peak help topics](#)

Creating Meeting Types in Peak

Meeting types in Peak function as templates for specific types of meetings. They store agenda outlines for different meetings. For example, a regular meeting may have a different agenda outline than a special or workshop meeting; a committee meeting might have a different agenda outline than a council meeting.

To work with meeting types, click **Admin** in the upper right-hand corner. Choose **Meeting Types** from the menu on the left, then select **Manage Meeting Types**. Note: Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Manage Meeting Types

This page shows all of the meeting types in the system. Think of a meeting type as a template for a specific kind of meeting.

[GUIDE ME](#)

[CREATE](#)

TITLE ^	ACTIONS
Commission Meeting	 
Committee Meeting Workshop	 
Emergency Meeting	 
Finance Committee Agenda	 
General Meeting	 
Special Meeting	 

From here, you can edit, delete, or create meeting types.



To edit a meeting type, click the **pencil** icon.



To delete a meeting type, click the **trash can**.



To create a new meeting type, click the **Create** button.

The **Create** button will take you to the meeting type detail page, where you can create as many different meeting types as you need. A list of existing types appears on the left. To search for a specific meeting type, enter the name in the **Search** field. To view or edit details of an existing meeting type, click its name in the list at the left.

Manage Meeting Types

Meeting types enable you to configure settings for agendas of a specific type (e.g., regular session versus working session).

Search

Commission Meeting

Committee Meeting Workshop

Emergency Meeting

Finance Committee Agenda

General Meeting

Special Meeting

Year End Meeting

Create

Title *

Archive Folder *

Please select an Archive Folder

This is a required field

Choose the folder into which Peak should archive recordings for this Meeting Type.

Agenda Template

Please select an Agenda Template

Choose the agenda template for this Meeting Type.

ADD SECTION

Numbering Scheme

-

Enter details for the new meeting type:

Field	Action
Title	Click the field, then enter the meeting type name.
Archive Folder	This drop-down menu is populated with archive folders from the Granicus platform (MediaManager). Click the menu, then choose the folder into which Peak should store archives created with MediaManager or LiveManager for this meeting type. The archive folder is a required field and can be changed at any time; however, only those meetings that have not yet occurred will use the newly assigned archive folder. Archives created from past meetings will remain in the folder that was in place before the change was made.

Agenda Template	You have the option of requesting multiple custom agenda templates. This enables you to have customized format and logo for as many meeting bodies as you need. Any report set up by Granicus will populate this drop-down menu. The agenda report template assigned here will be the default for any meeting using said meeting type. If you leave this field blank, meetings created with this meeting type will use the site's default agenda report template. Contact Customer Care to request your customized report templates.
Add Section	Click the Add Section button to bring up the Add Section modal (see below).
Section Title	Click the Title field and enter a name for this section of the meeting's agenda.
Standard Text	Click the field, then enter standard text for this section.
Numbered	Click the checkbox if you want this section and its associated agenda items to be part of the numbering scheme.
Numbering Scheme	Use the drop-down menu to select a numbering scheme for your meeting type, e.g., 1.a, 1.b, 2.a., 2.b., etc.

After you click **Add Section**, you'll enter a title in the **Title** field and any applicable standard text in the **Standard Text** field. Choose whether you want the new section to be part of the numbering scheme by checking or deselecting the **Numbered?** checkbox.

Create Regular Meeting

Title *

Regular Meeting

Archive Folder *

City Council ▼

Choose the folder into which Peak should archive recordings for this Meeting Type.

Agenda Template

Default template ▼

Choose the agenda template for this Meeting Type.

ADD SECTION

Numbering Scheme

- ▼

Title

Invocation

Standard Text

☒ **Numbered?**

CANCEL **SAVE**

Click **Save** to save the new sections of your meeting. Now, you can edit, delete, and rearrange the order of the sections. Use the **pencil** to edit, the **trash can** to delete, and the **handles** to rearrange sections. For example, in the below figure, an Old Business section has been added and is currently section 6. Click and hold the **move** icon, and drag the section to a new location:

1	Invocation	  
2	Roll Call	  
3	New Business	  
4	Committee Reports	  
5	Adjournment	  
6	Old Business	  

The following figure shows the new location of the section. The sections have been automatically renumbered:

1	Invocation	  
2	Roll Call	  
3	New Business	  
4	Old Business	  
5	Committee Reports	  
6	Adjournment	  

Click the large **Save** button at the bottom right when you are finished adding, editing, and moving the sections. Your new template displays in the list.

Note: These changes will apply to any new meetings created using this template; meetings previously created with this type will remain as they were and are unaffected by the changes.

Editing a Meeting Type

When you make changes to a section or sections on a meeting type that's being used on scheduled meetings, there are a few things to keep in mind:

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

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

[<<< Previous: Assigning Group Roles](#)

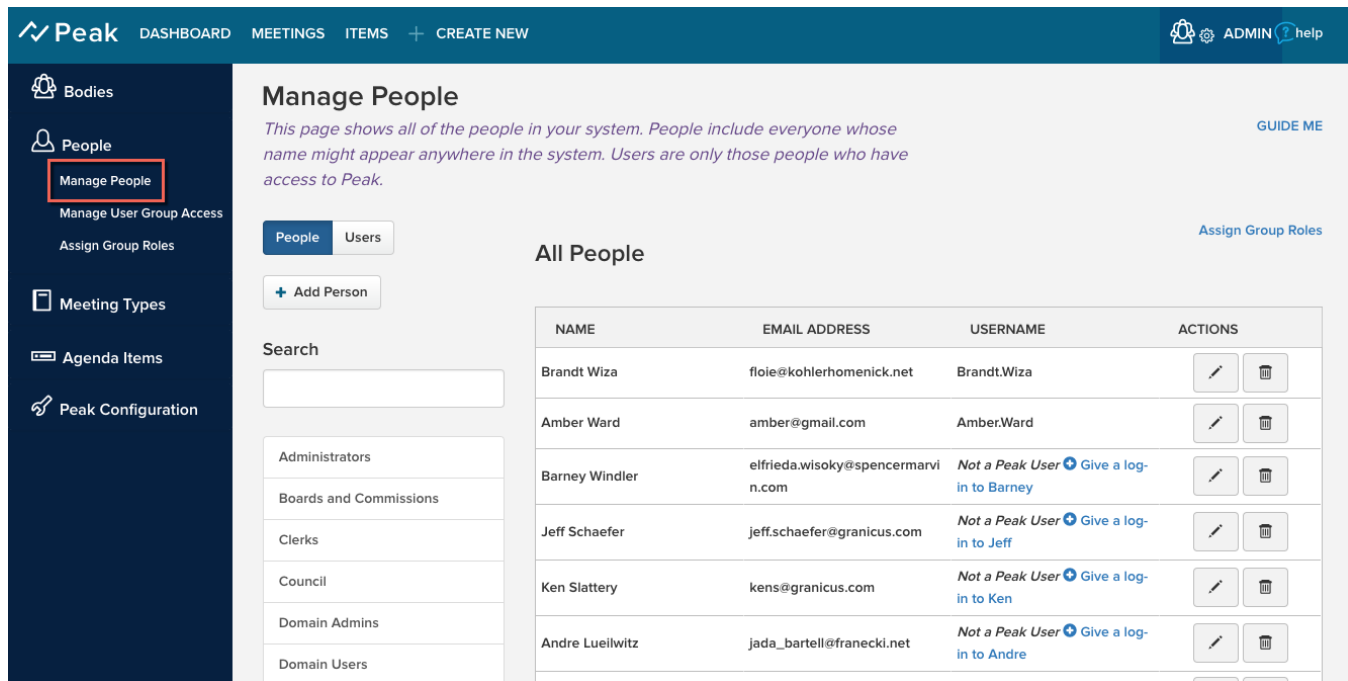
[>>> Next: Creating Meeting Statuses](#)

[Return to Peak help topics](#)

Creating People in Peak

The People section is where you will manage your Peak users and their roles/permissions. The Manage People page will display a list of all the people in your system and identify whether they have Peak user accounts. If your jurisdiction has [Boards and Commissions](#), your **People** list will pull from there.

To work with people, click **Admin** in the upper right-hand corner. Choose **People** from the menu on the left, then select **Manage People**. **Note:** Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Manage People

This page shows all of the people in your system. People include everyone whose name might appear anywhere in the system. Users are only those people who have access to Peak.

[GUIDE ME](#)

[Assign Group Roles](#)

People **Users**

[+ Add Person](#)

All People

NAME	EMAIL ADDRESS	USERNAME	ACTIONS
Brandt Wiza	floie@kohlerhomenick.net	Brandt.Wiza	 
Amber Ward	amber@gmail.com	Amber.Ward	 
Barney Windler	elfrieda.wisoky@spencermarvin.com	Not a Peak User Give a login to Barney	 
Jeff Schaefer	jeff.schaefer@granicus.com	Not a Peak User Give a login to Jeff	 
Ken Slattery	kens@granicus.com	Not a Peak User Give a login to Ken	 
Andre Lueilwitz	jada_bartell@franecki.net	Not a Peak User Give a login to Andre	 

From here, you can edit, delete, or add people.



To edit a person's details, click the **pencil** icon.



To delete a person, click the **trash can**.



To add a new person, click the **Add Person** button in the upper left of the screen.

Only a platform administrator can create user accounts. To create a user account for a given person, click **Give a log-in to . . .** next to that name.



The **Roles** menu enables you to [assign a role](#). Select a role from the menu, then click **Generate Log-In**.

Make Amber Ward a user. ✕

Warning: name will become a user for the whole Granicus Platform. You can edit [users](#) and [groups](#) in the Granicus Platform.

Title	Email Address	Department
Accounts Receivable	amber@gmail.com	Finance
Roles Assign Role (Optional) ▾ GENERATE LOG-IN		

Clicking **Generate Log-In** creates a user login for the person record, and [Peak will send an email](#) to the address entered in the **Email Address** field for the person record. The email contains the following:

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

If the Peak user login or password needs to change at any point, a platform administrator can take that action at the platform level using the *Users and Groups* menu option on the **Apps** drop-down menu.

Click the **Users** tab at the upper left to view only those individuals who have Peak user accounts. The All Users view contains a list of all users imported from the Granicus Platform, as well as any new users created via this procedure within Peak:

Manage People

This page shows all of the users with an account in Peak. Click the pencil icon to change a user's role in the system.

People

Users

+ Add Person

Search

Administrators

All Users

NAME	USER NAME
Elizabeth Warriner	Elizabeth.War
Granicus Anonymous	anonymous
Granicus Support	legistar
Shawn Beason	Shawn

From this page, you can view and change users' roles, and add people.

Peak

DASHBOARD MEETINGS ITEMS + CREATE NEW

ADMIN ? help

Bodies

People

Manage People

Assign Group Roles

Meeting Types

Agenda Items

Peak Configuration

Manage People

This page shows all of the users with an account in Peak. Click the pencil icon to change a user's role in the system.

GUIDE ME

Assign Group Roles

People

Users

+ Add Person

Search

Administrators

Boards and Commissions

Clerks

Council

Domain Admins

All Users

NAME	USER NAME	ROLES
Elizabeth Warriner	Elizabeth.Warriner	DRAFTER
Granicus Anonymous	anonymous	ADMIN
Granicus Support	legistar	ADMIN
Shawn Beason	Shawn	ADMIN
Js one	Jsone	NONE
Js two	Jstwo	NONE
Ashly Skiles	Ashly.Skiles	DRAFTER
Luke Danes	Idanes	NONE
Jane Smith	Jane.Smith	COORDINATOR

To change a user's role, click the **Pencil** icon next to the role label. A detail frame will appear, as shown below. Choose a new role from the drop-down menu. Click the green **Save** button at the lower right to save changes for this user. Please note that this modal will change a user's individual role, which overrides any [group role](#) the user may have been assigned.

Title

Accounts Receivable

Email Address

amber@gmail.com

Department

Finance

Roles

DRAFTER

Change Role...

SAVE

To add a new person, click the **Add Person** button at the upper left on the Users page. This will take you to the Create a New Person form:



Upload/Change

Name

Prefix

First Name

This is a required field

M.I.

Last Name

This is a required field

Suffix

Title

Department

▼

User

Select a user to associate with this person

▼

Contact

Email Address

This is a required field

Primary Phone

Fax

Address

Address Line 1

Address Line 2

City

State

▼

Zip

Notes

Fill in the details for your new person. **First Name**, **Last Name**, and **Email Address** are required fields:

Field	Action
Avatar	Click Upload/Change below the green circle to add a photo that will be associated with this account. An avatar is not required, and if no photo is uploaded, a colored head-

and-shoulders icon, along with the name, will be used on the [dashboard](#) and in [approval workflows](#).

*Please note: once added, an avatar cannot be deleted; it can only be updated with a new photo.

Name	Click each field to add a prefix, first name, middle initial, last name, and suffix as needed.
Title	Click the field, then add the title.
Department	Use the drop-down menu to select which department the person belongs to. The list is populated with the departments set up in Peak . If you do not yet have departments set up, you can go back later to add one by editing the person/user.
User	You can assign an existing Peak user to your person record. This is useful for users that were imported from your Granicus platform and do not have associated people records. Click the User drop-down menu and choose the user you want to link to this person.
Contact	Click within the fields, then enter email address (required), phone, and fax, if applicable. Be sure to enter a correctly formatted email address, as this is needed to create a user login. This email address will be used to send approval notification emails for any items this user is assigned in an approval workflow .
Address	Click within the fields, then enter address information for this person.
Notes	Click within the field, then enter any notes you wish to store for this person.

Click **Save** at the bottom right to save the new person record to the system. The record now displays in the list of all people.

[<<< Previous: Creating Meeting Bodies](#)

[>>> Next: User Roles](#)

[Return to Peak help topics](#)

Role Definitions in Peak

The following table shows the different levels of permissions for users of Peak Agenda Management:

Permission Level	Description
None	This role is limited to approving assigned agenda items, viewing the details and attachments associated with those items, viewing the Items page, and viewing the dashboard to see 1) the count of items awaiting approval and 2) upcoming meetings.
View Only	One step above the None role in that this user will have view-only access all Final-status agendas associated with their user group, and view-only access to all agendas not restricted to a group. No editing permissions.
Drafter	This role has the ability to create and manage everything related to agenda items and agenda item workflow. A Drafter can also view agendas, along with associated items and attachments, when those agendas have been assigned a Final status.
Agenda Coordinator	This role has all the permissions of the Drafter, plus the ability to create and manage meetings and agendas.
Peak Admin	This role has all the permissions of the Agenda Coordinator, with the addition of access to Peak Admin, which allows configuration and management of the application.
Platform Administrator	This role has the ability to manage users and groups in the Granicus Platform . It has all the privileges of a Peak Admin as well as the capability to create user logins for people records in Peak.

To learn how to add a user and set permissions for that user, see [Creating People in Peak](#). To learn about assigning roles to groups of users, see [Assigning Group Roles in Peak](#).

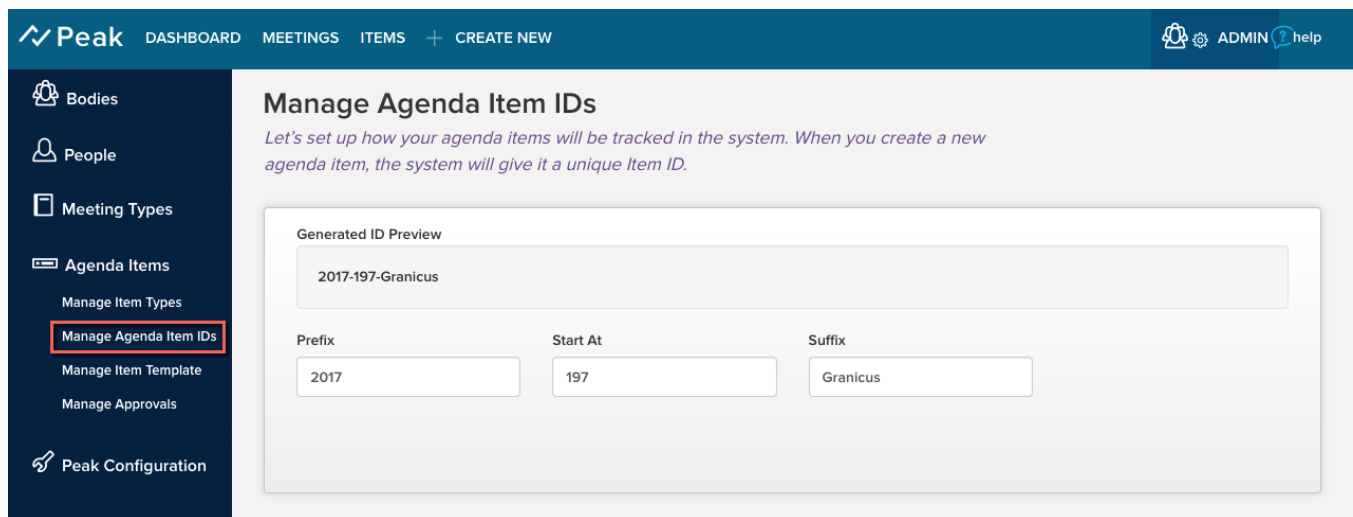
[<<< Previous: Creating People](#)

[>>> Next: Managing User Group Access](#)

[Return to Peak help topics](#)

Customizing Agenda Item IDs in Peak

The agenda item ID numbering system allows you to specify the numbering format used to automatically assign a unique tracking number to each of your agenda items. To set up your numbering system, click **Admin** in the upper right-hand corner of the Peak dashboard. Choose **Agenda Items** from the menu on the left, then select **Manage Agenda Item IDs**. Note: Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Enter the details of your numbering system:

Field	Description
Prefix	What you enter here will be the prefix added to the unique ID of each agenda item. You can use letters or numerals in this field.
Start At	This serves as a counter that will assign, in ascending order, a number to each agenda item as it is created. The counter will increase by one every time an agenda item is added. If you start the counter at 100, for example, the first agenda item will be 100; the following agenda item will be 101, and so on. Click the field and enter the number you wish to start with. The minimum number is 0

Field	Description
	(zero)—any non-negative integer can be used as the starting number.
Suffix	What you enter here will be the suffix added to the unique ID of each agenda item. You can use letters or numerals in this field.

The Generated ID Preview will show you what the next agenda item ID will look like and will update in real time as you type. Click the **Save** button to save your agenda item numbering system; it will not save automatically.

Note: If you [create a new version of an item](#), the various records of the item will share an agenda item ID. Duplicating the item, however, will result in a new ID being assigned.

[<<< Previous: Creating Item Types](#)

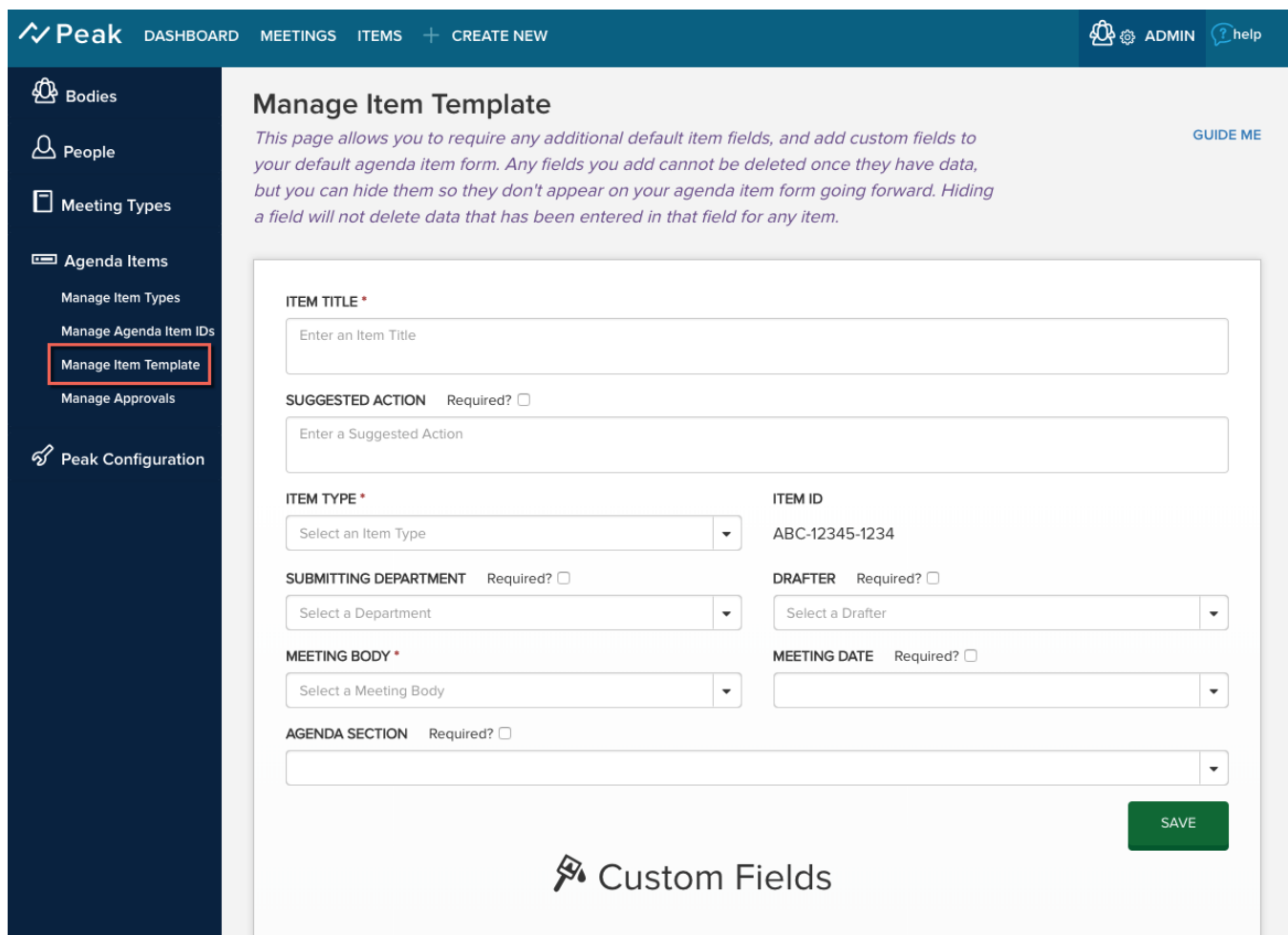
[>>> Next: Customizing the Item Template](#)

[Return to Peak help topics](#)

Customizing the Item Template in Peak

The Agenda Item Template page enables you to customize your default agenda item form. You can add custom fields to track data not otherwise available on the default form.

To work with the agenda item template, click **Admin** in the upper right-hand corner of the Peak dashboard. Choose **Agenda Items** from the menu on the left, then select **Manage Item Template**. **Note:** Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Peak DASHBOARD MEETINGS ITEMS + CREATE NEW ADMIN help

Manage Item Template [GUIDE ME](#)

This page allows you to require any additional default item fields, and add custom fields to your default agenda item form. Any fields you add cannot be deleted once they have data, but you can hide them so they don't appear on your agenda item form going forward. Hiding a field will not delete data that has been entered in that field for any item.

ITEM TITLE *

Enter an Item Title

SUGGESTED ACTION Required? ☐

Enter a Suggested Action

ITEM TYPE *

Select an Item Type

ITEM ID

ABC-12345-1234

SUBMITTING DEPARTMENT Required? ☐

Select a Department

DRAFTER Required? ☐

Select a Drafter

MEETING BODY *

Select a Meeting Body

MEETING DATE Required? ☐

AGENDA SECTION Required? ☐

SAVE

 Custom Fields

The fields shown on this page give you a preview of the form used to create agenda items. This is your default form.

Use the **Required** checkbox where available to make a field required, i.e., a user must fill it out in order to save an agenda item. You can make the following fields required: **Suggested Action**, **Submitting Department**, **Drafter**,

Meeting Date, and **Agenda Section**. The other fields (**Item Title**, **Item Type**, **Meeting Body**) are already required by the system; this cannot be changed.

Be sure to click the green **Save** button after you've made any changes to which fields are required.

Custom Fields

Click the green **Add Field** button to create a custom field:



As you fill in this form, the elements will show up in the **Preview** on the left half of the screen.

Preview

Customize

Name (Read-Only)

Type *

Text Field

Label *

This will show in bold above the control as a prompt for the user

This field is required

Placeholder

This text will be displayed until this field is filled out

255 characters left

Required?

CANCEL

SAVE

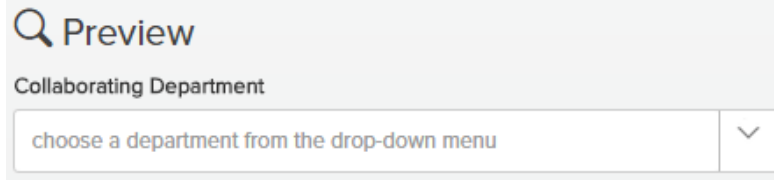
1. Choose a type from the **Type** drop-down menu. The available types are described in the table below.
2. Type a label in the **Label** field. This text will display above the control and will prompt the user's action.

- 3. Type placeholder text in the **Placeholder** field. This is the text that will display in gray in the template's field until it has been filled out. The **Preview** field on the left shows the appearance of your custom field.
- 4. Select whether the field will be required on the agenda template. If this is a required field, click the **Required** checkbox. A red asterisk appears next to a mandatory field or radio button.
- 5. Click **Save**.

Note: Do not enter any text in the **Name** field. This will auto-populate based on the Label give to the field.

The table below shows the different types of fields you can create using the **Type** drop-down menu.

Custom Field Type	Description
Text Field	This is a plain-text field supporting up to 255 characters that allows you to track text-based data: Preview Please provide a description of the agenda item: type your text here
Date Picker	This date field allows a calendar selection so you can track dates: Preview Deadline 12/31/2015
Meeting Body Combo Box	This option provides a drop-down selection of existing meeting bodies already set up in Peak. See Managing Meeting Bodies to add additional meeting bodies. Preview Coordinating Meeting Body choose a meeting body from the drop-down menu
Department Dropdown	This provides a drop-down selection of existing departments already set up in Peak. See Managing Departments to add additional departments.



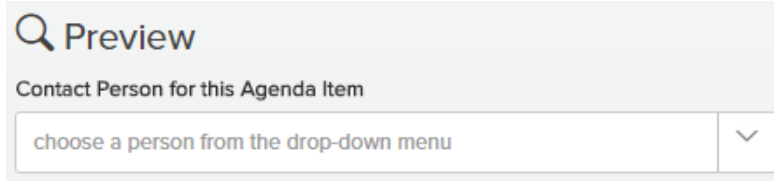
Preview

Collaborating Department

choose a department from the drop-down menu

Provides a drop-down selection of people in your system. See [Managing People](#) to add people and Peak users.

People Dropdown



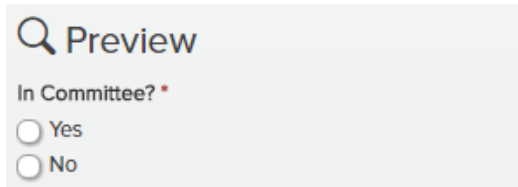
Preview

Contact Person for this Agenda Item

choose a person from the drop-down menu

This provides a Yes/No selection option. Please note the radio button becomes a required field on the template by default. Required fields are denoted by the red asterisk.

Radio (Yes/No)



Preview

In Committee? *

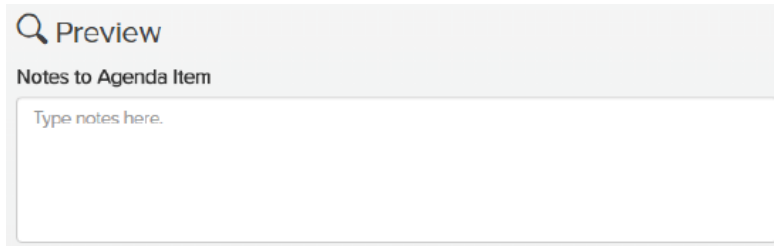
☐ Yes

☐ No

This option provides a multi-line plain text field that supports entries of up to 65,535 characters.

Note: White spacing and indents are not supported in this field. While it will display during editing, this formatting will not be retained once viewed in read-only mode or published.

Text Area



Preview

Notes to Agenda Item

Type notes here.

Custom Dropdown

This options gives you a drop-down menu that allows you to define what the menu options are. When you select Custom Dropdown, you can add the menu options using the **Option 1** field. Click **Add Another Option** to create additional menu selections. Each menu option can contain up to 1,000 characters.

Preview

This applies to the following counties:

Adams

Arapahoe

Douglas

Jefferson

Your fields show in a list beneath the **Custom Fields** heading.

Custom Fields

Public Hearing? *

☐ Yes

☐ No

Internal Notes Only:

Not public notes

Second Associated Department

Contact Person for this Item *

choose a person from the drop-down menu

In Committee? *

☐ Yes

☐ No

ADD FIELD

You can now edit, delete, or rearrange the order of the fields. Use the **pencil**



to edit, the **trash can**



to delete, and to reorder the fields, click and hold the **handles**



and drag the item to a new location in the list of fields. The new order will automatically save. Please note that any custom fields cannot be deleted once they have data entered on any agenda item. You can, however, hide custom fields on those items where they have not yet been populated with data and on any new item created.

To hide a custom field, click the **pencil** icon to edit the field. Then click the **Hidden?** checkbox on the bottom of the right side of the modal.

The screenshot shows a modal window with two panels. The left panel, titled 'Preview', displays a form with a search icon and the text 'Going to Council? *'. Below this are two radio buttons labeled 'Yes' and 'No'. The right panel, titled 'Customize', contains configuration options for the field. It includes a 'Name' field with the value 'going_to_council' and a character count of '239 characters left'. Below this is a 'Type' dropdown menu set to 'Radio (Yes/No)'. The 'Label' field contains 'Going to Council?' with a character count of '238 characters left'. At the bottom of the 'Customize' panel, there is a checkbox labeled 'Hidden?' which is circled in red. Below the checkbox are 'CANCEL' and 'SAVE' buttons.

Click the green **Save** button to save any edits you've made to the custom field.

Note: Custom fields set up here can be published to agenda reports and packets. Once you've created the desired custom fields, you can make a request with Customer Care for these fields to show up under the related item on the agenda report. A field will display only if there's data entered in it for a given agenda item. If you create additional fields after your request has been processed, you'll need to make an additional request to include the new custom fields on your reports. [Make your request here.](#)

[<<< Previous: Customizing Agenda Item IDs](#)

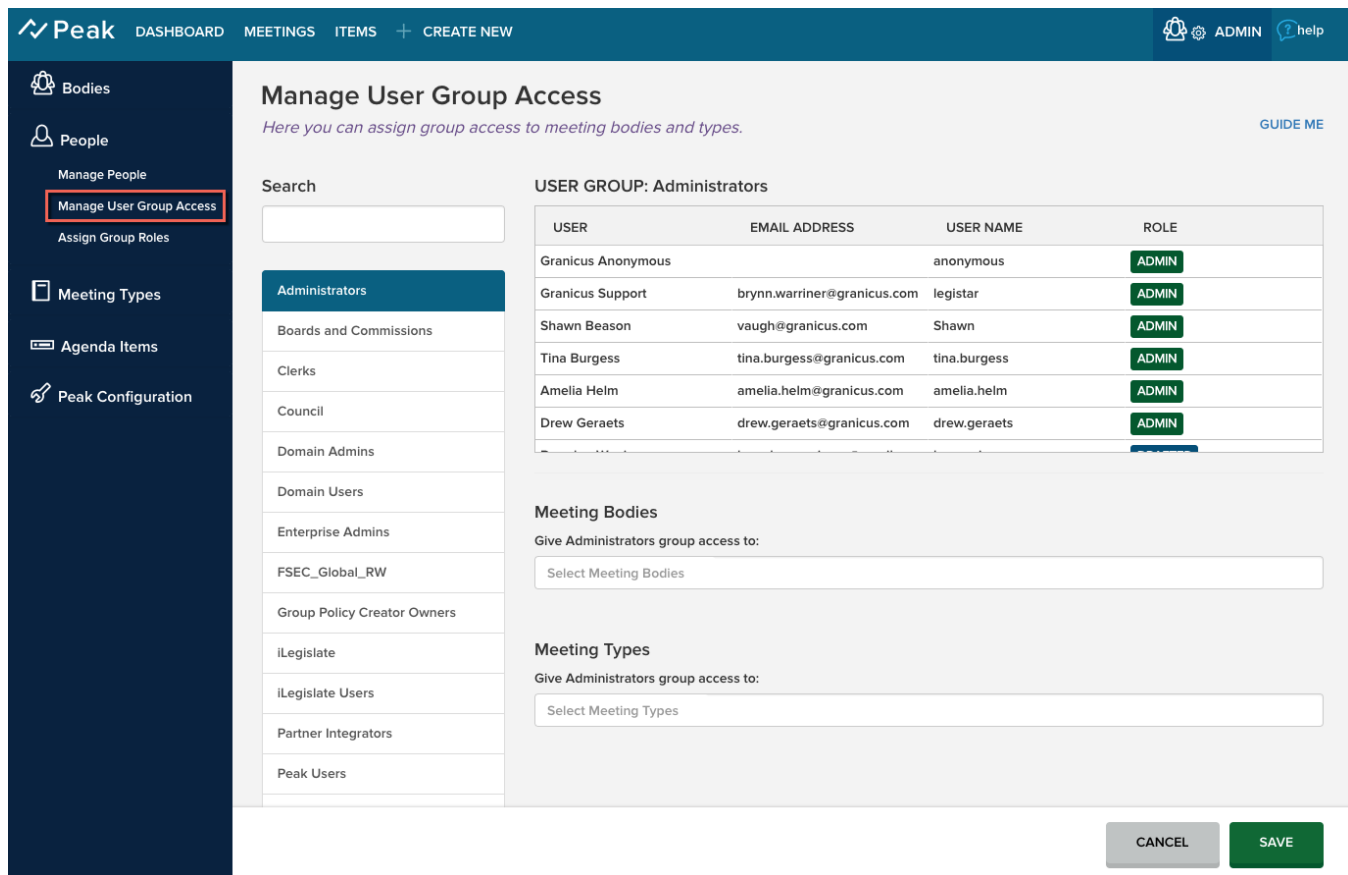
[>>> Next: Managing Workflow Approvals](#)

[Return to Peak help topics](#)

Managing User Group Access in Peak

The Manage User Group Access page enables Admins to control which groups of Agenda Coordinators have access to use each meeting type and body as they create meetings.

To work with user group access, click **Admin** in the upper right-hand corner. Choose **People** from the menu on the left, then select **Manage User Group Access**. **Note:** Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Peak DASHBOARD MEETINGS ITEMS + CREATE NEW ADMIN ? help

Manage User Group Access
Here you can assign group access to meeting bodies and types. [GUIDE ME](#)

Search

USER GROUP: Administrators

USER	EMAIL ADDRESS	USER NAME	ROLE
Granicus Anonymous		anonymous	ADMIN
Granicus Support	brynn.warriner@granicus.com	legistar	ADMIN
Shawn Beason	vaugh@granicus.com	Shawn	ADMIN
Tina Burgess	tina.burgess@granicus.com	tina.burgess	ADMIN
Amelia Helm	amelia.helm@granicus.com	amelia.helm	ADMIN
Drew Geraets	drew.geraets@granicus.com	drew.geraets	ADMIN

Meeting Bodies
Give Administrators group access to:
Select Meeting Bodies

Meeting Types
Give Administrators group access to:
Select Meeting Types

CANCEL **SAVE**

Once a user group is assigned to a meeting body or type, Agenda Coordinators belonging to the user group will have the usual permissions when creating meetings. Any meeting body or type that does not have a user group assigned to it will be available to all Agenda Coordinators.

From the list on the left of the form, select a user group. You can use the **Search** field at the upper left to quickly find a group. Once you click the group name, the group's members show up in a list on the right side of the page.

Click within the **Meeting Bodies** field to reveal a drop-down list of the meeting bodies set up in your Peak system. Choose one or more meeting bodies for this user group. As meeting bodies are selected, they'll display in the field. Click the **x** to remove any from selection.

Meeting Bodies

Give Boards and Commissions group access to:

City Council X

City Event Commission X

Board of Health

City Development Planning Board

Civil Service Commission

Election Commission

Financial Committee

Fine Art Commission

Repeat this process for **Meeting Types**.

Meeting Types

Give Boards and Commissions group access to:

Emergency Meeting X

General Meeting X

Commission Meeting

Committee Meeting Workshop

Finance Committee Agenda

Special Meeting

Year End Meeting

Click **Save** to apply these permissions.

Enhanced Security

You can further tighten permissions using the **Enhanced user group security** toggle on the [Site Settings](#) page. If this setting is enabled, agendas and their agenda items of meeting bodies and types will be hidden from users who are not part of a group assigned to them. Meetings are still visible on the dashboard and calendar for these users, but if they attempt to access the agenda (or meeting details, in case of an Agenda Coordinator), they will be denied. For agenda items, these users will not see those items on the Items page or in the list of unscheduled items when building an agenda using the **Add Item** button.

Effects on Other Users

The following applies to all users other than Admins (View Only, Drafter, Agenda Coordinator) for meeting bodies and types that they are not assigned to via a user group:

Agendas: Final agendas are available as read-only. If the user can view an agenda, all the items of the agenda can also be viewed in read-only mode, regardless of whether they are approved. However, if the **Enhanced user group security** toggle is set to **On**, the user cannot view these final agendas or items.

Meetings are still visible on the dashboard and calendar for these users, but if they try to access the agenda (or meeting details, in case of an Agenda Coordinator), they will be denied.

Items: Approved items will be available from the Items page in read-only mode (denoted by the **eye** icon). Non-approved items will not be visible from the Items page but can be viewed if part of an agenda that the user can view.

Note: Users involved in an approval workflow as approvers or FYI-only are unaffected by this feature.

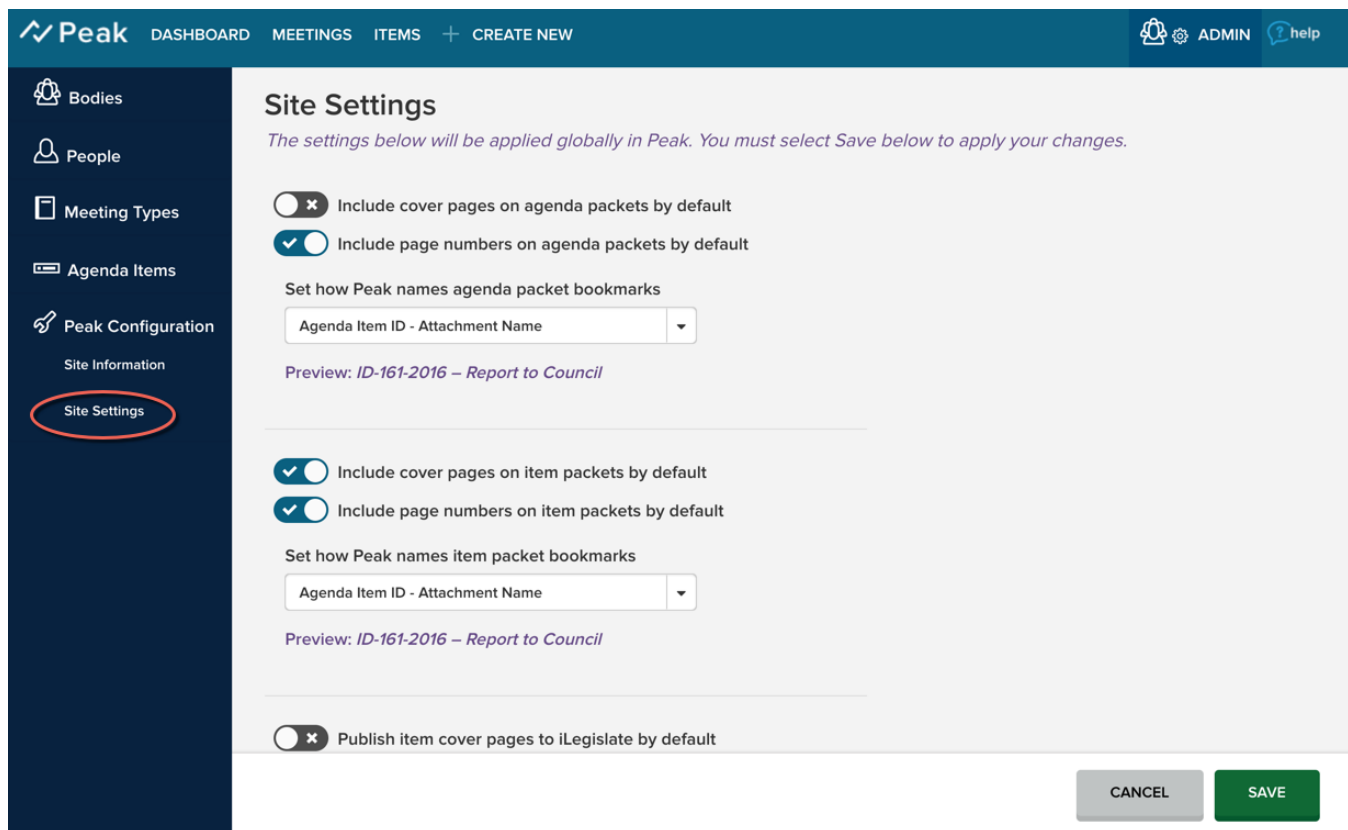
[<<< Previous: User Role Definitions](#)

[>>> Next: Assigning Group Roles](#)

[Return to Peak help topics](#)

Site-wide Settings in Peak

The Site Settings page in Admin enables you to configure site-wide settings for Peak. To work with settings, click **Admin** in the upper right-hand corner of the Peak dashboard. Choose **Peak Configuration** from the menu on the left, then select **Site Settings**. Note: Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Peak DASHBOARD MEETINGS ITEMS + CREATE NEW ADMIN help

Bodies
People
Meeting Types
Agenda Items
Peak Configuration
Site Information
Site Settings

Site Settings

The settings below will be applied globally in Peak. You must select Save below to apply your changes.

☐ Include cover pages on agenda packets by default
☒ Include page numbers on agenda packets by default

Set how Peak names agenda packet bookmarks
 Agenda Item ID - Attachment Name
 Preview: ID-161-2016 – Report to Council

☒ Include cover pages on item packets by default
☒ Include page numbers on item packets by default

Set how Peak names item packet bookmarks
 Agenda Item ID - Attachment Name
 Preview: ID-161-2016 – Report to Council

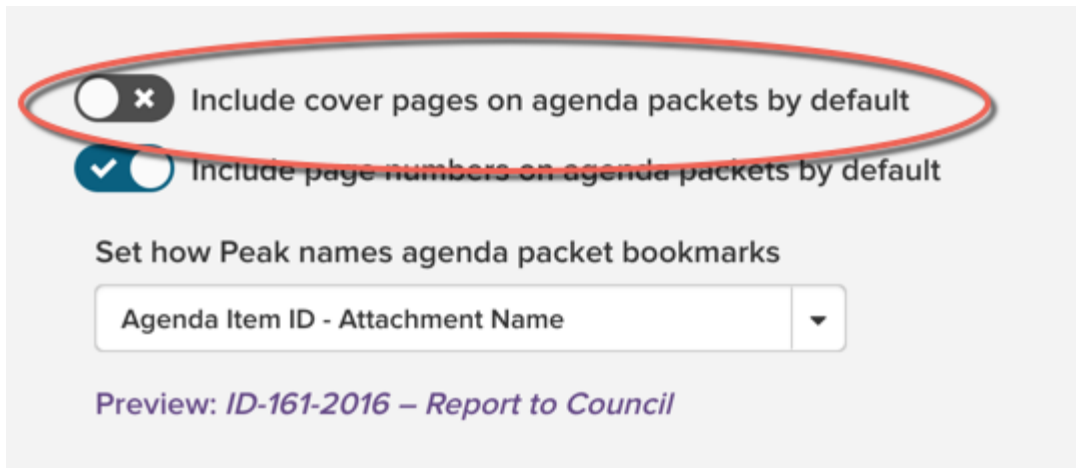
☐ Publish item cover pages to iLegislate by default

CANCEL SAVE

Agenda Packet Settings

Cover Pages

Use the **Include cover pages on agenda packets by default** toggle to determine the default cover page setting for downloading or publishing agenda packets from the Agenda Details page.



☐ x Include cover pages on agenda packets by default

☒ Include page numbers on agenda packets by default

Set how Peak names agenda packet bookmarks

Agenda Item ID - Attachment Name ▼

Preview: *ID-161-2016 – Report to Council*

If the toggle is set to **On**, indicated by the checkmark, the **Use Cover Pages** setting on the **Download** menu will be selected (illustrated below). If the toggle on this page is off, indicated by the **x**, the **Use Cover Pages** setting will be deselected. The setting is site-wide and applies to all meetings, but an Agenda Coordinator or Peak Admin can always change the checkbox on an individual agenda packet generation.

This setting does not affect the cover page setting at the item level. Scroll down for item packet settings.

DOWNLOAD **AUGUST 30, 2016 CITY EVENT COMMISSION**

AGENDA ONLY OR **AGENDA PACKET**

☒ **FOR PUBLIC** THIS WILL NOT INCLUDE ITEM ATTACHMENTS MARKED CONFIDENTIAL

☐ **FOR COUNCIL** THIS WILL INCLUDE ALL ATTACHMENTS

☒ **USE COVER PAGES**

PUBLIC PACKET HAS NOT BEEN GENERATED.

GENERATE PACKET

Packet has not been generated. Click the generate button to start.

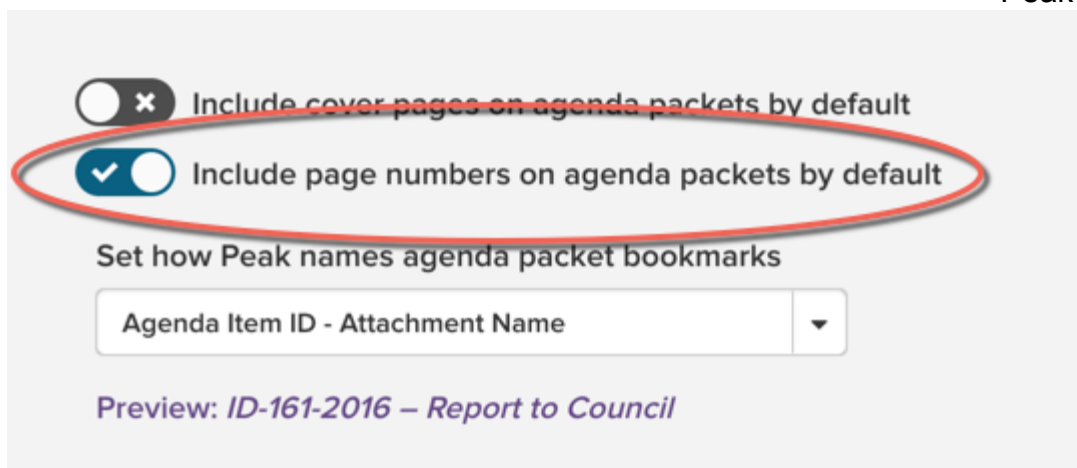
DOWNLOAD **CANCEL**

If you elect to include cover pages, [agenda packets](#) will contain a cover page for each agenda item, preceding its attachments. The exception to this is agenda items for which cover pages have individually been marked as excluded via the [Agenda Item Details](#) page.

Be sure to click **Save** at the bottom right of the page to retain any settings you change.

Page Numbers

Use the **Include page numbers on agenda packets by default** toggle to determine whether agenda packets will contain page numbers when published. This toggle is on by default; turn it off to prevent page numbers from being added to agenda packets.



☐ ~~Include cover pages on agenda packets by default~~

☒ Include page numbers on agenda packets by default

Set how Peak names agenda packet bookmarks

Agenda Item ID - Attachment Name ▼

Preview: ID-161-2016 – Report to Council

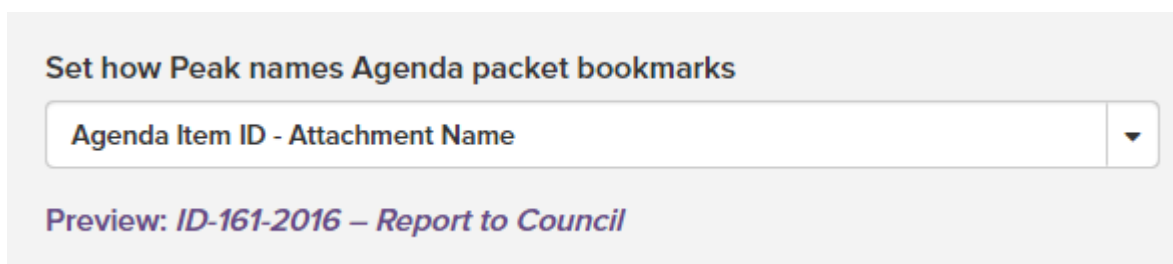
Name Setting for Agenda Packet Bookmarks

You can also set a default naming convention for attachment and cover page bookmarks in agenda packets using the **Set how Peak names Agenda packet bookmarks** drop-down menu on this page.

The options for bookmarking attachments are as follows:

1. Agenda Item ID – Attachment Name (e.g., ID-161-2016 – Report to Council)
2. Item Agenda Number – Attachment Name (e.g., Item 7.1 – Report to Council)
3. Attachment Name (e.g., Report to Council)

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



Set how Peak names Agenda packet bookmarks

Agenda Item ID - Attachment Name ▼

Preview: ID-161-2016 – Report to Council

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

1. ID-161-2016 – Cover Page
2. Item 7.1 – Cover Page
3. Cover Page

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

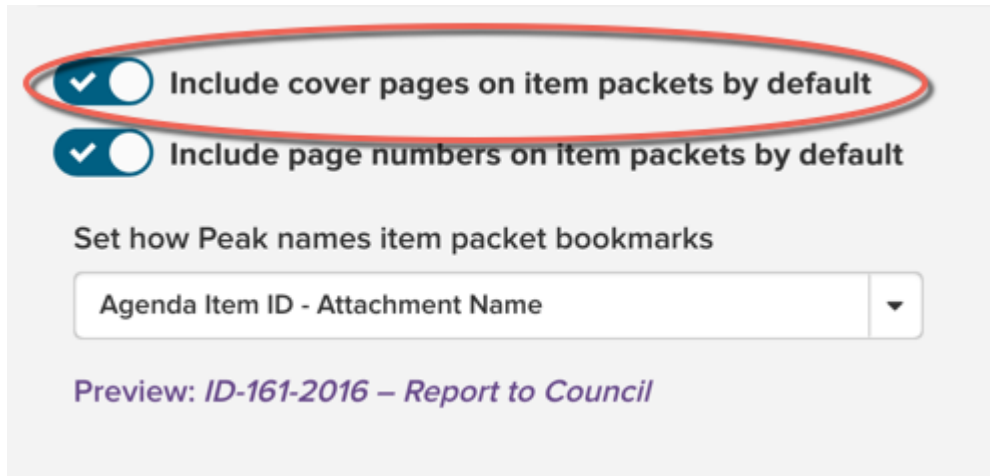
The bookmark will include the use of [custom numbering](#) on the agenda item if the *Item Agenda Number* option is selected. If the section to which the item belongs is unnumbered, bookmarks will contain only the attachment name (or "Cover Page").

After you have selected a bookmark naming convention from the drop-down menu, click **Save** at the bottom right to apply the setting to Peak.

Item Packet Settings

Cover Pages

Use the **Include cover pages on item packets by default** toggle to determine the default cover page setting for [generating item packets](#).



If the toggle is set to **On**, indicated by the checkmark, any new agenda items created will have the toggle set to on (cover pages included).

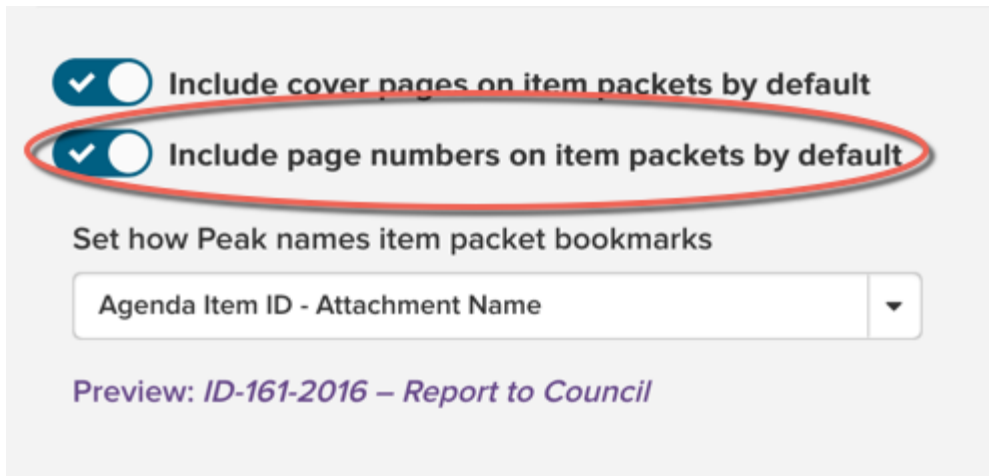
If set to off (cover pages excluded), any new agenda items created from that point forward will have the toggle set to exclude cover pages. Items created when the toggle was set to on will retain that setting unless changed.

The setting is site-wide and applies to all meetings, but a Drafter, Agenda Coordinator, or Peak Admin can always change the setting for individual items as appropriate using the left menu bar on the [Agenda Item Details page of any item](#).

Note: Creating a new version or a duplicate of an agenda item does not use this site setting toggle, but rather copies the setting of the source item.

Page Numbers

Use the **Include page numbers on agenda item packets by default** toggle to determine whether agenda packets will contain page numbers when published. This toggle is on by default; turn it off to prevent page numbers from being added to agenda packets.



☒ Include cover pages on item packets by default

☒ Include page numbers on item packets by default

Set how Peak names item packet bookmarks

Agenda Item ID - Attachment Name ▼

Preview: *ID-161-2016 – Report to Council*

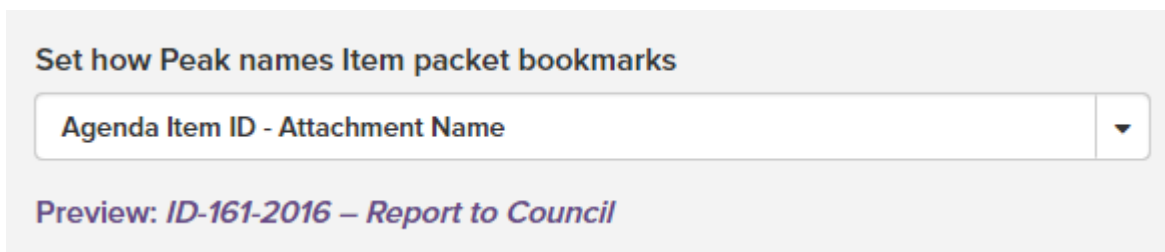
Name Setting for Item Packet Bookmarks

You can also set a default naming convention for attachment and cover page bookmarks in item packets using the **Set how Peak names item packet bookmarks** drop-down menu.

The options are as follows:

1. Agenda Item ID – Attachment Name (e.g., ID-161-2016 – Report to Council)
2. Attachment Name (e.g., Report to Council)

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



Set how Peak names item packet bookmarks

Agenda Item ID - Attachment Name ▼

Preview: *ID-161-2016 – Report to Council*

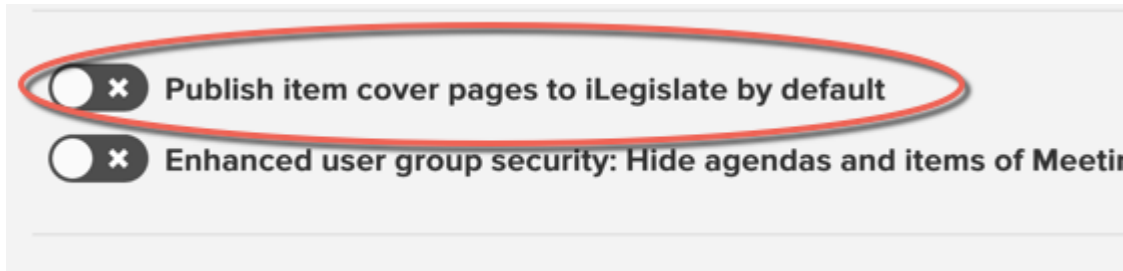
For the respective cover page link, examples are as follows:

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

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

Publish Item Cover Pages Setting

Use the **Publish item cover pages to iLegislate by default** toggle to determine whether cover pages should be included when [publishing agendas to the Granicus Platform and iLegislate](#).



This setting is defaulted to **No**, indicated by the x. When set to **No**, publishing does not distribute the cover page to the [Platform](#) or [iLegislate](#). If set to **Yes**, Cover Pages are published to iLegislate and the Granicus Platform for those agenda items that have **Cover Page Included** selected when the agenda is published ([see above](#)). When publishing to iLegislate or the Platform, the cover page will be listed as the first attachment for each agenda item viewable online and also on iLegislate. The name of the attachment will be "Cover Page."

For existing agenda items, turning on this site setting will not automatically update and add cover pages to all of the agendas on iLegislate. Agenda coordinators should download the agenda report as well as generate the agenda packet, then publish to iLegislate to update agendas.

Enhanced User Group Security Setting

The Enhanced user group security toggle enables you to set tighter user group security if desired. If this setting is enabled, agendas and their agenda items of meeting bodies and types will be hidden from users (other than Admins) who are not part of a group assigned to them via the [Manage User Group Access](#) page.

Meetings are still visible on the dashboard and calendar for these users, but if they try and access the agenda (or meeting details, in case of an Agenda Coordinator), they will be denied. For agenda items, these users will not see those items on the Items page or in the list of unscheduled items when building an agenda using the **Add Item** button.

If the option is set to **Off**, the following applies:

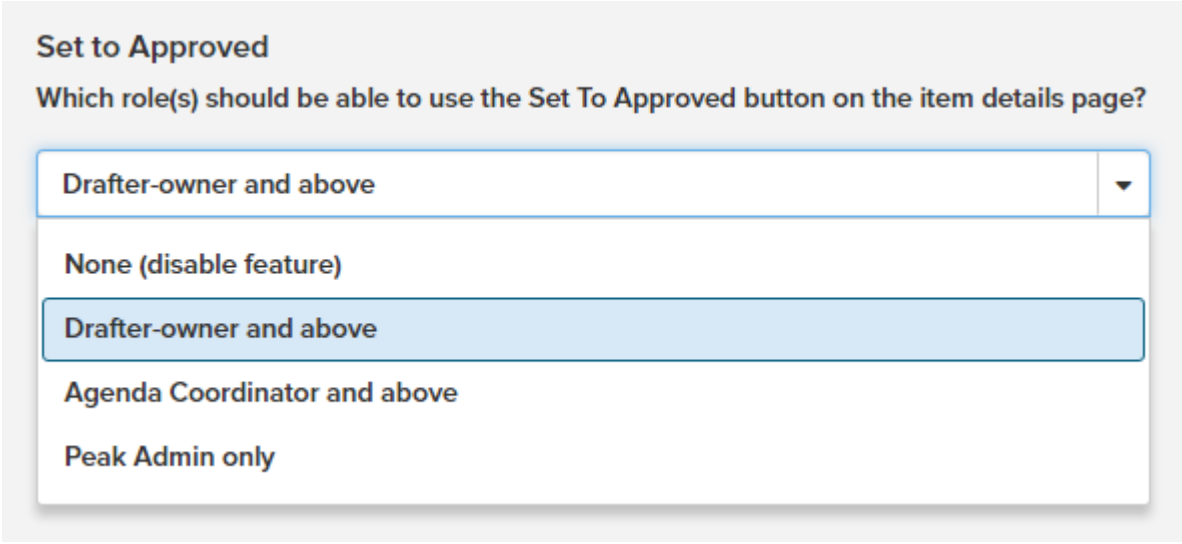
- Agendas: Agenda Coordinators, Drafters, and View Only users can access final agendas in view-only mode even if they are not part of a user group that has access to the associated meeting bodies.
- Agenda Items: Agenda Coordinators, Drafters, and View Only users can view approved agenda items of these meeting bodies in read-only mode.

Note: Approvers in a workflow are not affected when this security setting is **Off**; they can always access an agenda item they are a reviewer for.

Set to Approved/Set to Draft Function Menu

The **Set to Approved** drop-down menu enables you to set the minimum permission level needed to access the **Set to Approved/Set to In Draft** button found on the [Agenda Item Details page](#). This button is used to bypass an approval workflow on a draft item and move it immediately to the Approved state, or, when unlocked by a Peak Admin or Agenda Coordinator, a user can move an approved item back to In Draft. This menu enables a Peak Admin to control which users can access this function by selecting from four options: **None** (this option disables the feature for all users), **Drafter-owner and above**, **Agenda Coordinator and above**, and **Peak Admin only**.

Note: The **None** selection here is not related to the None role; instead, it hides this button for any role in Peak, thus disabling the **Set to Approved/Set to Draft** function. The default selection is Drafter-owner and above.



The screenshot shows a configuration window titled "Set to Approved". Below the title is the question "Which role(s) should be able to use the Set To Approved button on the item details page?". There is a dropdown menu with a blue border and a downward arrow on the right. The menu is open, showing five options: "Drafter-owner and above" (which is highlighted with a blue background), "None (disable feature)", "Drafter-owner and above" (repeated), "Agenda Coordinator and above", and "Peak Admin only".

Approver Editing Permissions

Use the Approvers can edit items in an approval workflow toggle to set whether approvers can make changes to the items they're approving. The default setting is **Off**.

Set to Approved

Which role(s) should be able to use the **Set To Approved** button on the item details page?

☒ **Approvers can edit items in an approval workflow**

With this setting, users normally blocked from editing an item due to their role, user group restrictions, or enhanced security can edit the item details if they are part of the workflow. These permissions apply only while the approval phase is active for that user. Once the user has approved or delegated, their normal permissions take effect.

Note: This setting does not apply to FYI-only users in an active workflow phase. These users continue to have read-only or edit access based on their role, user group, and enhanced security restrictions.

Be sure to click **Save** at the bottom right to apply a changed setting to Peak.

[<<< Previous: Configuring Site Information](#)

[>>> Next: Navigating the Meetings Page](#)

[Return to Peak help topics](#)

Peak Agenda Management: Agenda Items

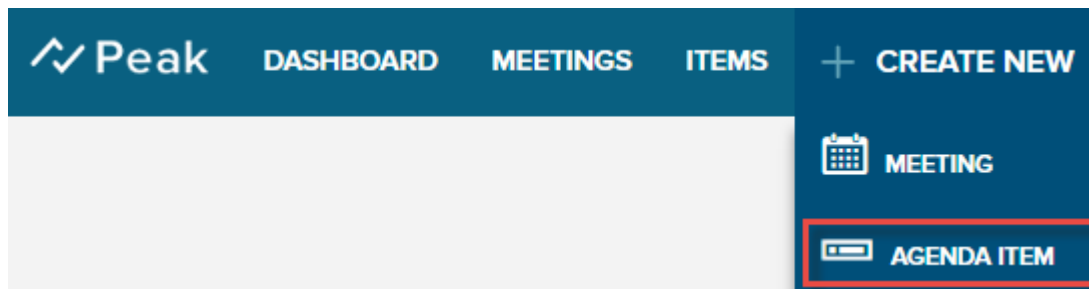
In this section, learn how to draft and edit agenda items and generate agenda packets for the public or council.

	Navigating the Items Page
Peak Agenda Items	Using Advanced Search
	Creating Agenda Items
	The Item Details Page
Item Details Page	Item History
	Creating a New Version of an Agenda Item
	Generating Agenda Item Packets
	Activity Stream Email Notifications

Creating Agenda Items in Peak

Use this page to create agenda items and attach them to specific meeting bodies and meetings. This functionality is available to users with an [Admin](#), [Agenda Coordinator](#), or [Drafter](#) role.

1. To create an agenda item, click **Create New** on the Peak navigation bar, then choose **Agenda Item**.



The following figure illustrates the fields on the Agenda Item Details page. Required fields are indicated by a red asterisk.

Agenda Item Details

ITEM TITLE *

SUGGESTED ACTION

ITEM TYPE *

Select an Item Type

ITEM ID

2016-XXXX-Granicus

SUBMITTING DEPARTMENT

Select a Department

DRAFTER

Granicus Support

MEETING BODY *

Select a Meeting Body

MEETING DATE

Select a Meeting

AGENDA SECTIONS

2. Enter the details for your agenda item, described in the table below.

Feature	Action
Item Title	Click the field, then type the name of the agenda item. If formatting is turned on in Admin , you can format using font, size, bold, italic, strikethrough, underline, color, and bullet or numbered lists. This field has a five-thousand-character limit.
Suggested Action	Click the field, then type a suggested action for your agenda item. This field has a five-thousand-character limit.
Item Type	Select an item type from the drop-down menu.
Item ID	This is the unique tracking number that the system automatically assigns to each item. Please note that while you are drafting an

item, the ID will show format only; a number will be assigned once you click **Save**.

Submitting Department

Use the drop-down menu to select which [department](#) is submitting the agenda item.

Drafter

The **Drafter** field is auto-populated with the name of the current user. You can change the drafter to another name by clicking on the drop-down menu, but after saving, you will no longer have access to this item as the drafter. Whomever you have reassigned as drafter of the agenda item will be able to edit the details.

This menu contains all users with the roles of Drafter, Agenda Coordinator, and Admin.

Meeting Body

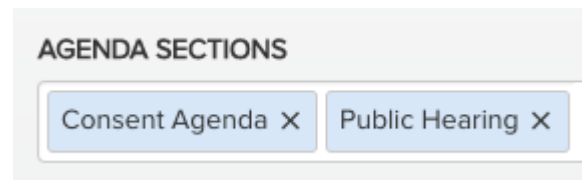
Use the drop-down menu to select a target [meeting body](#) for the agenda item.

Meeting Date

This drop-down menu contains a chronological list of all [meetings](#) in the coming year associated with the body selected in the **Meeting Body** menu. Click the menu and choose the meeting date for this agenda item.

Agenda Sections

This drop-down menu is populated with the sections of the agenda for the meeting selected in the **Meeting Date** menu. The sections will be based on the structure of the [meeting type](#) used for the meeting at the time of its creation. Click the menu and select which section of the agenda this item should be attached to. You can add the item to multiple sections by selecting more sections from the menu. Remove a section by clicking the **x** next to its name.

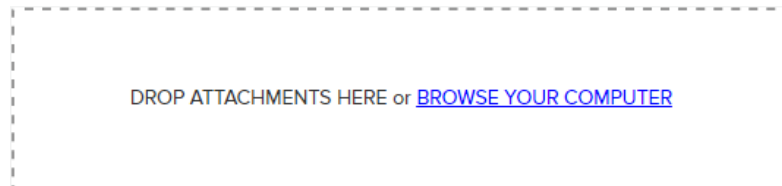


3. Enter information into any [custom fields](#) set up by a Peak Admin.

4. Add attachments if applicable. You can rename your attachments and specify the level of privacy desired. Each attachment can be up to 200 MB in size. Most Windows- and Mac-based file types are supported ([see a full list here](#)). All files will be converted to PDF for packet generation.

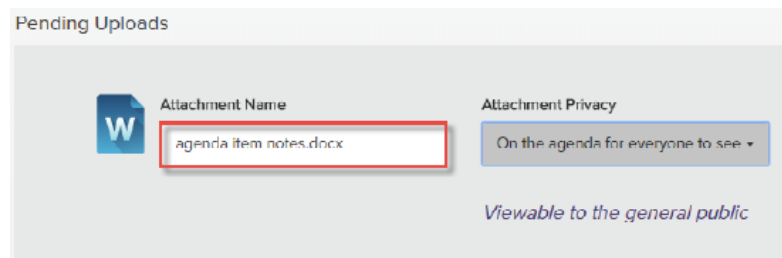
Click **Browse Your Computer** to browse locally for files, or you can drag-and-drop files anywhere within the box.

Attachments



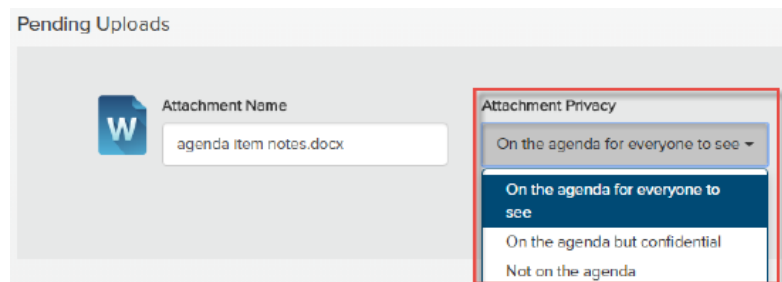
Your upload will show as pending. Click the **Attachment Name** field to rename the attachment if necessary.

Attachment Name



Now, click the Attachment Privacy drop-down menu and choose the appropriate level of privacy for this attachment: *On the agenda for everyone to see*, *On the agenda but confidential*, or *Not on the agenda*.

Attachment Privacy



5. Choose whether you want to set up an [approval workflow](#) at this time. You can also do this later by editing an existing agenda item. To set up approvals, click the **Set up Approvals** checkbox before you click **Save**.



6. Click the green **Save Item** button to save your meeting details and attachments—attachments are not uploaded until you save.

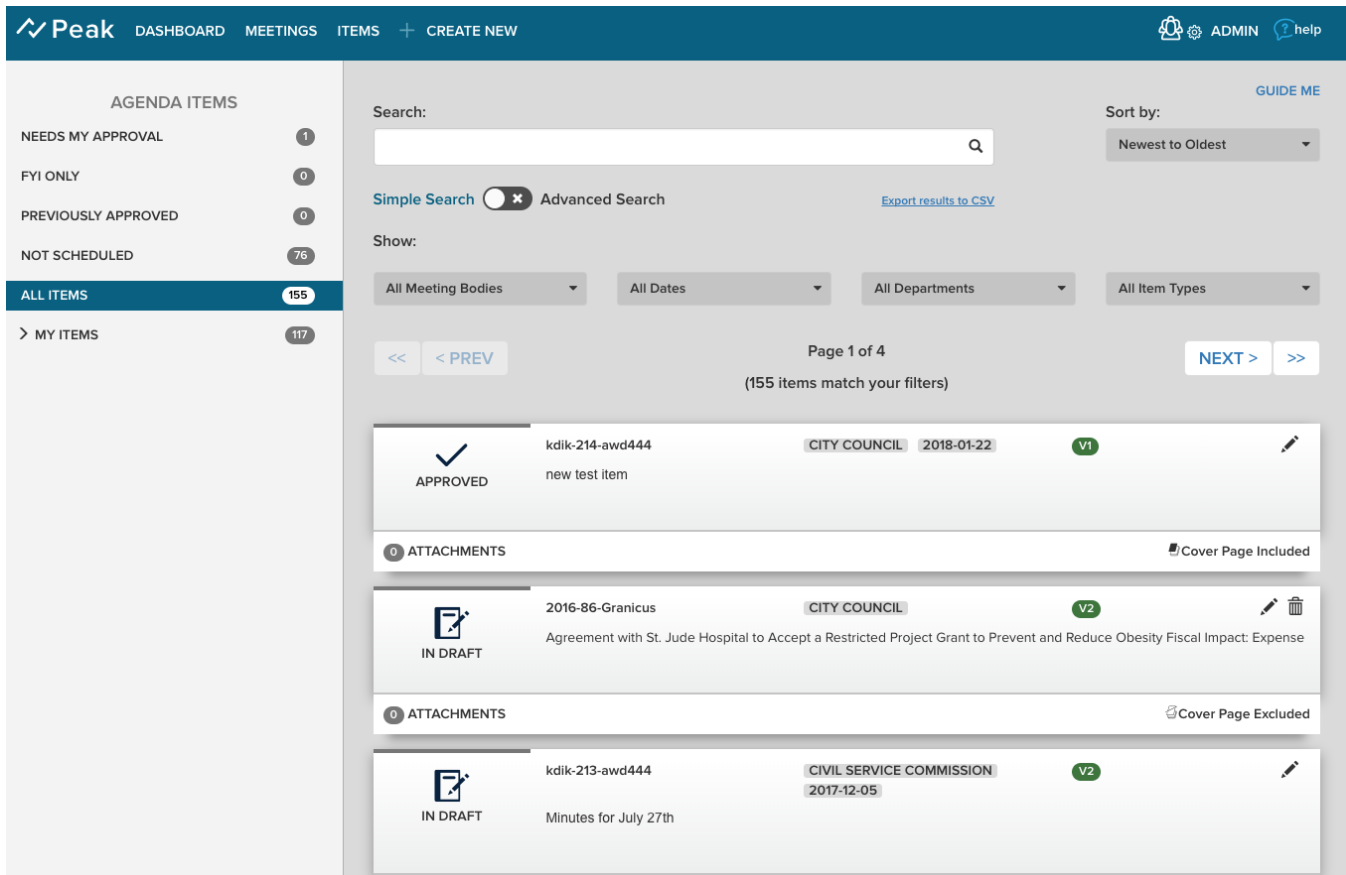
[<<< Previous: Navigating the Items Page](#)

[>>> Next: Editing Agenda Items](#)

[Return to Peak help topics](#)

Navigating the Items Page in Peak

The Items page lists all agenda items that are in the system. From this page, you can filter, search, and sort agenda items. The page displays up to 50 items at a time. Use the **< Prev** and **Next >** buttons to view more items. The back (<<) and forward (>>) double arrows enable you to jump to the first or last page of items.



wowThe item cards give you at-a-glance information about each agenda item:

Feature	Description
Status	Each item's status is shown on the left side as either 1) In Draft, which means that an item has been created but is not yet going through an approval process, 2) In Review, meaning the item is currently in the workflow process of approvals, or 3)

Approved, which indicates that the item has completed the workflow process and has been approved by all assignees.

This screenshot shows an item card for '2016-197-Granicus'. On the left, there is a red-bordered box containing a green checkmark icon and the word 'APPROVED'. To the right of this box, the item ID '2016-197-Granicus' is displayed. Further right, the committee name 'LICENSE AND VARIANCE BOARD' is shown in a grey box, followed by the date '2017-03-09' in a smaller grey box. To the right of the date is a green circle with 'V1' inside. On the far right, there is a pencil icon. Below the main card area, there is a section for '0 ATTACHMENTS' and a note 'Cover Page Included'.

The item's automatically generated ID number displays near the top left.

Item ID

This screenshot shows an item card for '2016-162-Granicus'. On the left, there is a blue icon of a document with a pencil and the text 'IN DRAFT'. To the right of this icon, the item ID '2016-162-Granicus' is displayed and circled in red. Further right, the committee name 'PARKS & RECREATION COMMISSION' is shown in a grey box, followed by a green circle with 'V1' inside. On the far right, there are pencil and trash icons. Below the main card area, there is a section for '0 ATTACHMENTS' and a note 'Cover Page Included'.

The item's name displays under the ID number.

Item's Name

This screenshot shows an item card for '2016-165-Granicus'. On the left, there is a green checkmark icon and the word 'APPROVED'. To the right of this icon, the item ID '2016-165-Granicus' is displayed. Further right, the committee name 'LICENSE AND VARIANCE BOARD' is shown in a grey box, followed by a green circle with 'V1' inside. On the far right, there is a pencil icon. Below the ID and committee name, the item name 'Renewal - Grappa Inc. d/b/a Grappa Mediterranean Bistro & Margarita Grill, 1027 Washington Avenue (City Attorney)' is displayed and circled in red. Below the main card area, there is a section for '2 ATTACHMENTS' with two attachment names: 'AVC 1.png' and 'AVC 2.png'. A note 'Cover Page Included' is also present.

Item cards also show the number of attachments associated with the item. Click the **arrow** next to the work Attachments to view them, and click the name of an individual attachment to view it.

Attachments

This screenshot shows an item card for '2016-143-Granicus'. On the left, there is a blue icon of a document with a pencil and the text 'IN REVIEW'. To the right of this icon, the item ID '2016-143-Granicus' is displayed. Further right, the committee name 'PUBLIC ART COMMISSION' is shown in a grey box, followed by a green circle with 'V2' inside. On the far right, there are pencil and trash icons. Below the main card area, there is a section for '2 ATTACHMENTS' which is highlighted with a red border. Inside this section, there are two attachment names: 'Final Handbook 5288593.docx' and 'Revised Handbook.docx'. A note 'Cover Page Included' is also present.

CURRENT APPROVER(S): Albert Einstein, Gertrude Stein, Katrina Van Marter

Scheduled Date

If the item has been scheduled, you'll see the meeting body it is scheduled to and the meeting's date at the upper right of the card.


IN REVIEW

2016-188-Granicus
Item 4439876

CIVIL SERVICE BOARD
2017-04-04

V1



0 ATTACHMENTS

Cover Page Included

CURRENT APPROVER(S): Albert Einstein, Gertrude Stein, Katrina Van Marter

The record number indicates which [record of the item](#) this card represents. The most current record will be highlighted in green.

Record
Number


IN DRAFT

2016-160-Granicus
Broadband Discussion

ELECTION COMMISSION

V2




0 ATTACHMENTS

Cover Page Included

Click the **pencil** icon on an item card to edit its details. The edit function is available to the Drafter of the item, or to users with an Agenda Coordinator or Admin role. The **pencil** will also take you to the approval workflow of the item.

Pencil


IN REVIEW

2016-189-Granicus
Concert in the Park Series

CITY EVENT COMMISSION

V1




2 ATTACHMENTS

Cover Page Included

CURRENT APPROVER(S): Cynthia Morton

When an item is in the queue for your review and approval, there will be an **eye** icon in instead of the **pencil**. Clicking the **eye** enables you to view the details of and attachments associated with the agenda item. You'll be able to view these items indefinitely after they have been approved.

Eye


IN DRAFT

2016-107-Granicus
Small Business Council Initiatives

SMALL BUSINESS COUNCIL

V2



0 ATTACHMENTS

Cover Page Included

Trash can

A **trash can** icon will display in the upper right-hand corner of the item card if the item is not associated with a meeting date. Click the **trash can** to delete the item from the system.



APPROVED

2016-100-Granicus
 MLK Day Proclamation 2016

CITY COUNCIL

V3



0 ATTACHMENTS

 Cover Page Included

The bottom right of the card displays whether this item has a [cover page included or excluded for agenda packets](#), as defined on the [item's details page](#).

Cover Page



IN DRAFT

2016-148-Granicus
 Bike Library Update

CITY COUNCIL

2016-12-23

V3



0 ATTACHMENTS

 Cover Page Included

If the item is in review, approver(s) in the current phase who have not yet approved the item will display at the bottom of the card. The Drafter or Agenda Coordinator can use this information to quickly see the status of an [item's workflow](#) without navigating to the item details page.

Approval Status



IN REVIEW

2016-188-Granicus
 Item 4439876

CIVIL SERVICE BOARD
 2017-04-04

V1



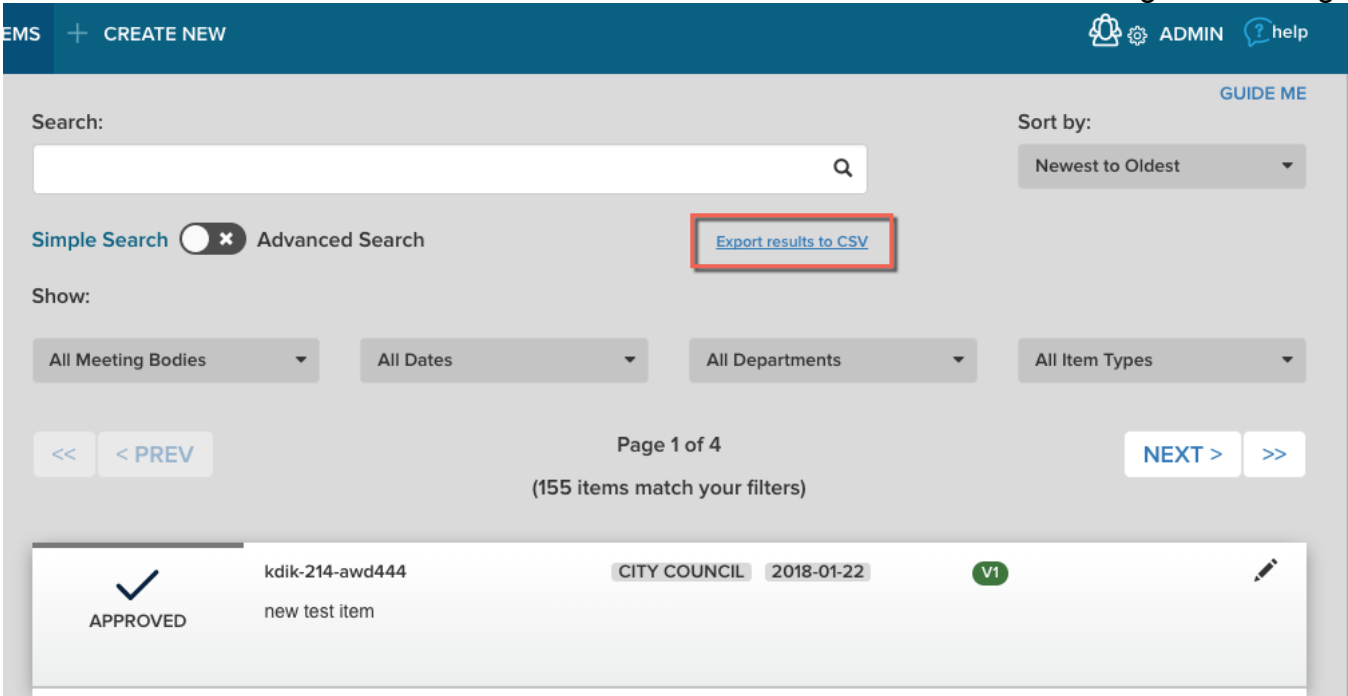
0 ATTACHMENTS

 Cover Page Included

CURRENT APPROVER(S): Albert Einstein, Gertrude Stein, Katrina Van Marter

On this page there are multiple sorting, filtering, and searching options to help you find the agenda items you want to work with. Up to fifty items will display per page, and you can use the **Next** and **Prev** buttons to navigate.

You can export the currently displayed list of items using the **Export results to CSV** link found near the top of the page.



The spreadsheet will contain columns for the following:

- Item ID
- Version
- Title
- Status
- Type (for Agenda Item Type)
- Submitting Department
- Meeting Body
- Meeting Date
- Current Approver(s) (if the agenda item is in review)
- Any Custom Fields for the jurisdiction, whether hidden or not

The items are ordered from oldest to newest, regardless of how they are displayed on the screen. You can provide additional sorting and filtering of the resulting CSV file when viewed in Excel.

Use any of the following to narrow the list of items:

Feature	Action
Needs My Approval	Click Needs My Approval filter to show only those agenda items awaiting your approval.

NEEDS MY APPROVAL	3
FYI ONLY	0
PREVIOUSLY APPROVED	0

Click the **FYI Only** filter to show only those items to which you're assigned as an FYI-only viewer on a workflow. This includes items that are in review or have been approved.

FYI Only

NEEDS MY APPROVAL	3
FYI ONLY	0
PREVIOUSLY APPROVED	0

The **Previously Approved** filter shows those items you have already approved.

Previously Approved

FYI ONLY	0
PREVIOUSLY APPROVED	0
NOT SCHEDULED	2

The **Not Scheduled** filter shows only those items not currently scheduled on an agenda.

Not Scheduled

PREVIOUSLY APPROVED	0
NOT SCHEDULED	2
ALL ITEMS	31

All Items

This is the default filter for the page. Click **All Items** to show all agenda items stored in Peak. Only Drafters, Agenda Coordinators, and Admins will be able to view **All Items**.

NOT SCHEDULED	2
ALL ITEMS	31
▼ MY ITEMS	4

Click this filter to show only items that belong to you. You can also further specify the filter by clicking **In Draft**, **In Review**, **Approved**, or **Not Scheduled**. Only Drafters, Agenda Coordinators, and Admins will be able to view **My Items**.

My Items

▼ MY ITEMS	4
IN DRAFT	3
IN REVIEW	0
APPROVED	1
NOT SCHEDULED	0

Click the **Search** field, then type part or all of an item name or ID number to quickly find it. Delete text from this field to remove the search filter. Use the toggle to switch to an [Advanced Search](#).

Note: You can search by agenda item ID to see all records of a particular item with the same item ID.

Search

Search:

Q

Simple Search

☐

Advanced Search

Show:

All Meeting Bodies

All Dates

All Departments

<<

< PREV

Page 1 of 3

(123 items match your filters)

✓

APPROVED

2016-188-Granicus

Item 4439876

CIVIL SERVICE BOARD

2017-01

0

ATTACHMENTS

Use the **Meeting Bodies** drop-down menu to apply a filter that shows only those items associated with the selected meeting body.

Meeting Bodies

Search:

Simple Search ☒ Advanced Search

Show:

Civil Service Board All Dates

Use the **Dates** drop-down menu to apply a filter that shows only those items associated with the selected meeting date. You can also select **Not Scheduled** at the top of the menu to filter by items not scheduled on an agenda.

Dates

Search:

Simple Search ☒ Advanced Search

Show:

Civil Service Board February 22nd, 2016

Use the **Departments** drop-down menu to apply a filter that shows only those items associated with the selected department.

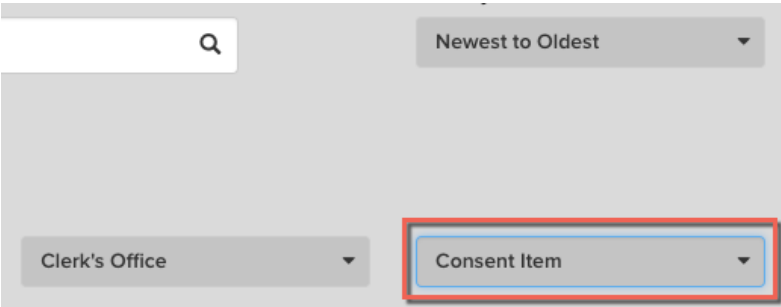
Departments

Search

February 22nd, 2016 Clerk's Office

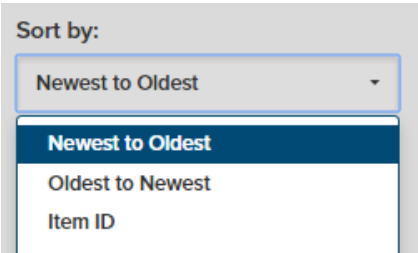
Item Types

Use the **Item Types** drop-down menu to apply a filter that shows items of the selected type, e.g., Ordinances.



Use the **Sort by** drop-down menu to arrange items in order of *Newest to Oldest*, *Oldest to Newest*, or by *Item ID*.

Sort by



Please note that the above filters, as well as the **Search** function, are additive. Each filter must be unselected to clear its effect.

[<<< Previous: Publishing an Agenda](#)

[>>> Next: Using Advanced Search](#)

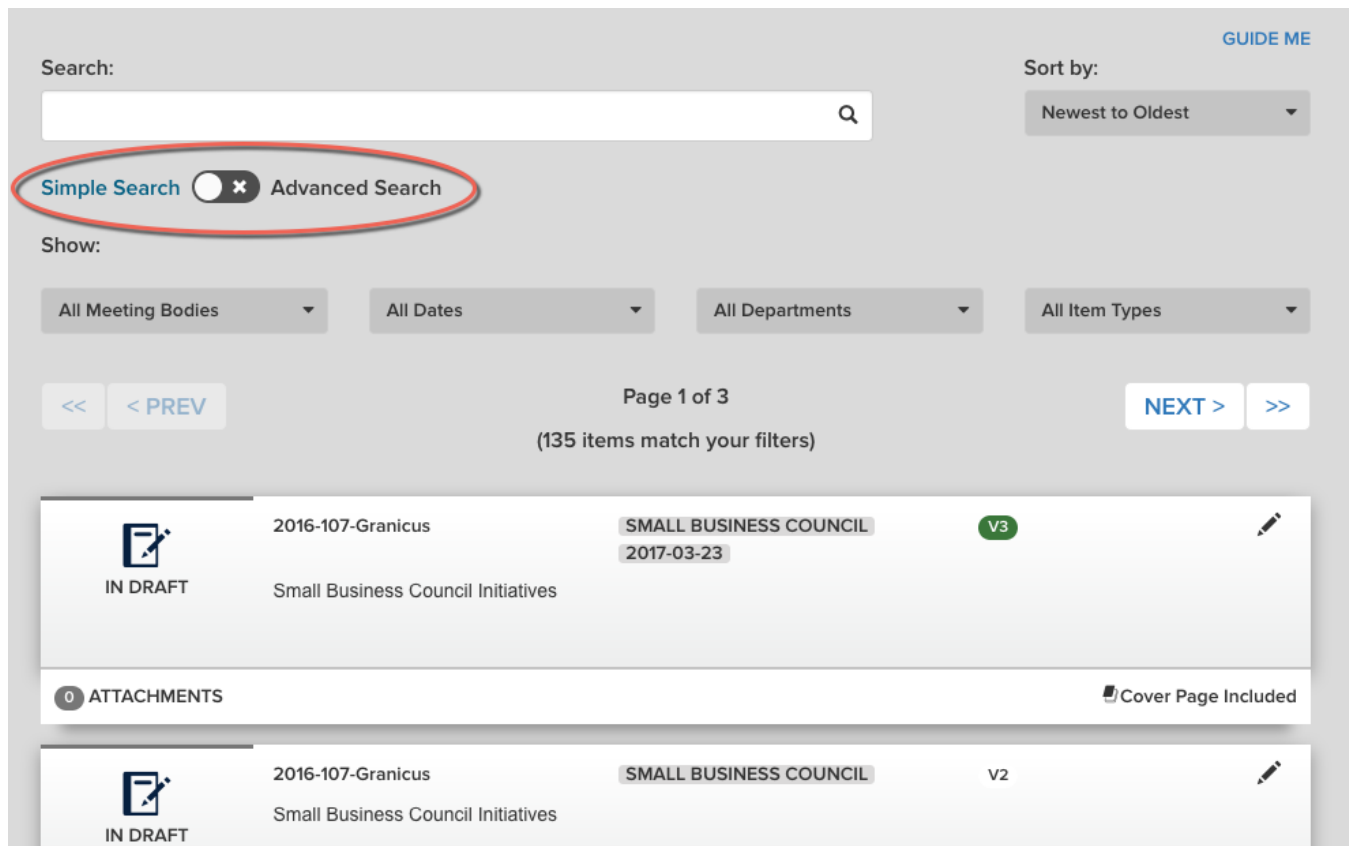
[Return to Peak help topics](#)

Using Advanced Search for Agenda Items

On the Items page, Peak gives you the ability to use a simple or advanced search. To use a simple search, type keywords or an item ID in the **Search** field. The results are filtered as you type.

Advanced Search

To use advanced search, use the toggle found under the **Search** field. It will be on **Simple Search** by default. Click to move it to **Advanced Search**:



Search: Q

Sort by: GUIDE ME
Newest to Oldest ▼

Simple Search ☐ **Advanced Search** ☒

Show:

All Meeting Bodies ▼ All Dates ▼ All Departments ▼ All Item Types ▼

<< < PREV Page 1 of 3 (135 items match your filters) NEXT > >>

 IN DRAFT	2016-107-Granicus Small Business Council Initiatives	SMALL BUSINESS COUNCIL 2017-03-23	V3	
0 ATTACHMENTS		 Cover Page Included		
 IN DRAFT	2016-107-Granicus Small Business Council Initiatives	SMALL BUSINESS COUNCIL	V2	

The Advanced Search fields display:

ADVANCED SEARCH

ITEM TITLE:

SUGGESTED ACTION:

ITEM TYPE: All Item Types

DRAFTER: All Drafters

MEETING DATE: Select a Meeting Date or Range

SUBMITTING DEPARTMENT: All Departments

MEETING BODY: All Meeting Bodies

ITEM ID:

ATTACHMENT SEARCH:

CUSTOM FIELDS

ADD CUSTOM FIELD SEARCH

RESET ALL FIELDS CANCEL SEARCH

You can search using any of the standard fields on an agenda item. Searches are not case sensitive.

Item Title

Enter text in the field to find all agenda item whose **Title** fields contain keywords entered. This field uses an intelligent search, which will return not only exact matches on English words but root word matches. For example,

- a search for "Negotiating" would also return items with "negotiate," "negotiation," etc., in the field;
- a search for "selection" would also return items with "select," "selecting," etc., in the field.

This field uses an *OR* type search if you enter multiple keywords, i.e., search results will include items that contain any one or more of the keywords entered.

Note: Searching for a word such as "legislation" will find agenda items that contain the word "legislation," but not those item titles in which the word is contiguous with other characters, for example, "legislation_080917" or "legislation10." Unlike simple search, which finds all items that contain a set of characters in the title as a partial or complete match, advanced search performs an intelligent exact-match search in these cases. To find these agenda items with advanced search, provide the complete set of contiguous, non-whitespace characters to retrieve the item, e.g., "legislation10."

Suggested Action

Enter text in the field to find all agenda items whose **Suggested Action** fields contain keywords entered. This field uses an intelligent search, which will return not only exact matches on English words but root word matches. For example,

- a search for "Negotiating" would also return items with "negotiate," "negotiation," etc., in the field;
- a search for "selection" would also return items with "select," "selecting," etc., in the field.

This field uses an *OR* type search if you enter multiple keywords, i.e., search results will include items that contain any one or more of the keywords entered.

Item Type

This drop-down menu contains the item types used in your Peak system.

Drafter

This drop-down menu contains the users set up in your Peak system.

Meeting Date

This drop-down menu contains multiple options for searching by date.

MEETING DATE:

ALL DATES

ALL DATES

ON

BEFORE

AFTER

BETWEEN

NOT SCHEDULED

Select an option and then select dates as described in the table below to narrow your search:

All Dates	This is the default selection and will not narrow the search based on dates.
On	This selection will return results that are scheduled only for the specified date. Select a date using the date picker (



) or enter a date in the field using the MM/DD/YYYY format.

This selection will return results prior to this date. The results will not be inclusive of the selected date.

Before

Select a date using the date picker (



) or enter a date in the field using the MM/DD/YYYY format.

This selection will return results following this date. The results will not be inclusive of the selected date.

After

Select a date using the date picker (



) or enter a date in the field using the MM/DD/YYYY format.

This selection will return results scheduled in the ranges spanning the two dates entered. This is an inclusive search, i.e., the results will include events that are scheduled on the two selected dates.

Between

MEETING DATE:	START:	END:
BETWEEN ▾	02/12/2017	03/31/2017

Use the calendar picker (



) in the **Start** and **End** fields to select the range of dates to search.

Not Scheduled This selection will return all unscheduled agenda items.

Submitting Department

This drop-down menu contains the departments used in your Peak system.

Meeting Body

This drop-down menu contains the meeting bodies used in your Peak system.

Item ID

Type an item ID in the field. This will return only exact matches for the item ID entered.

Attachment Search

Enter a filename or key words in the field. The system will search filenames, author, and title meta-data, as well as text contents of a document.

- You can also do a wildcard search (*.docx) to search for all agenda items with a DOCX attachment type. Enclose your search in double quotes in this field to search for filenames that include spaces, e.g., "minutes for 011217 meeting.docx".
- Up to 100 agenda items can be returned. Once results are returned, the attachments matching the criteria are highlighted in yellow.

Searching Standard Fields

Enter a value into a field or any combination of fields as described above and click **Search**.

Results of the search are shown with best matches at the top. If you search using more than one field, this is an *AND* type search, i.e., to be included in the results, items must contain matching values from all fields into which you enter data.

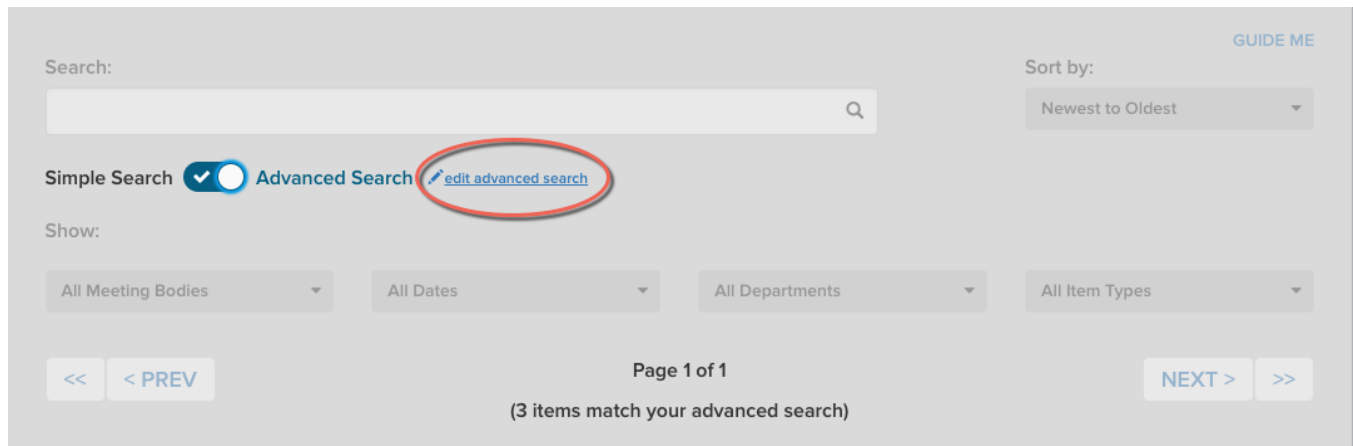
You'll also get an item count so you can see how many items match your search terms:

Page 1 of 1
(3 items match your advanced search)

 IN DRAFT	2016-100-Granicus MLK Day Proclamation 2016	CITY COUNCIL	V1	
0 ATTACHMENTS		 Cover Page Included		
 IN DRAFT	2016-100-Granicus MLK Day Proclamation 2016	CITY COUNCIL	V2	
0 ATTACHMENTS		 Cover Page Included		
 APPROVED	2016-100-Granicus MLK Day Proclamation 2016	CITY COUNCIL	V3	 
0 ATTACHMENTS		 Cover Page Included		

Peak Agenda Management

You can edit the terms of your search by clicking the **edit advanced search** link, which will display next to the toggle once you've used advanced search during your current Peak session (once you log out, the search will be cleared).



Search: Q

Sort by: GUIDE ME
Newest to Oldest ▼

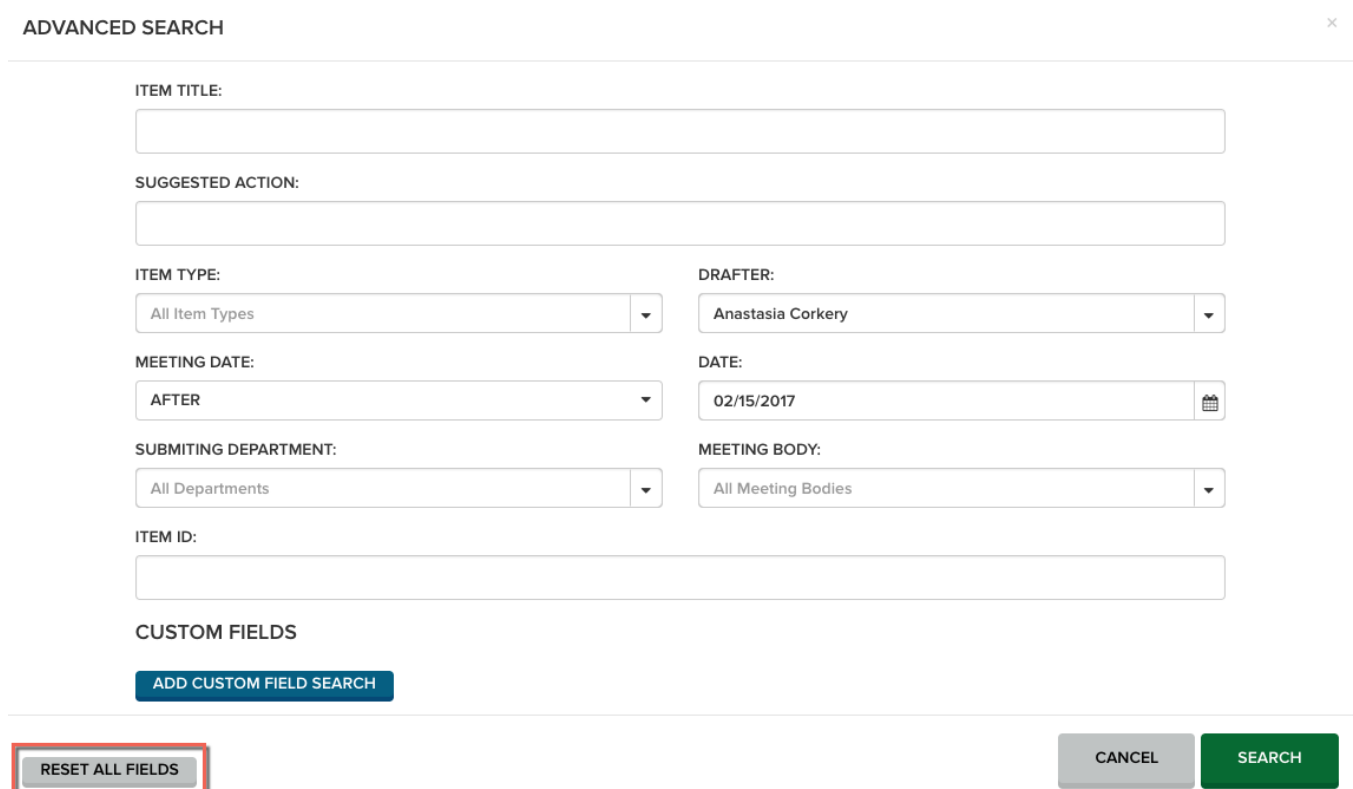
Simple Search ☒ Advanced Search [edit advanced search](#)

Show:

All Meeting Bodies ▼ All Dates ▼ All Departments ▼ All Item Types ▼

<< < PREV Page 1 of 1 (3 items match your advanced search) NEXT > >>

Clicking the link reopens the fields, enabling you to change information or add search terms to more fields. You can also click **Reset All Fields** at the bottom left to clear the search and start over. Click **Search** again when you've finished editing your terms.



ADVANCED SEARCH ×

ITEM TITLE:

SUGGESTED ACTION:

ITEM TYPE: All Item Types ▼ DRAFTER: Anastasia Corkery ▼

MEETING DATE: AFTER ▼ DATE: 02/15/2017 📅

SUBMITTING DEPARTMENT: All Departments ▼ MEETING BODY: All Meeting Bodies ▼

ITEM ID:

CUSTOM FIELDS

ADD CUSTOM FIELD SEARCH

RESET ALL FIELDS CANCEL SEARCH

To return to simple search, either first clear all the fields in Advanced Search with the **Reset All Fields** button and then click **Cancel**, or run an advanced search and then toggle the switch back to **Simple Search**

Adding Custom Fields to Your Search

You can also add one or more custom fields to your advanced search. With the Advanced Search modal open, click the **Add Custom Field Search** button at the bottom of the modal.

All Departments

▼

ITEM ID:

CUSTOM FIELDS

ADD CUSTOM FIELD SEARCH

RESET ALL FIELDS

Once you click the button, you'll see a drop-down menu containing the custom fields that have been set up in your system and used in the creation of at least one agenda item. Select the custom field you'd like to use in this search.

CUSTOM FIELDS

CUSTOM FIELD 1:

Select a Custom Field

▼

Alternate Contact

Additional Notes

Referring Meeting Body

Going to Council?

Select a

ALL F

Depending on what type of custom field you've selected, you will enter text or make a selection to specify what the search should look for. The custom fields selected in the examples shown below are named after the type of field represented. The **Custom Field** drop-down menu in your Peak system will contain the labels of the custom fields set up by your Peak Admin.

Custom Field Type Input Type

Text

Text Field

CUSTOM FIELDS

CUSTOM FIELD 1:

Text Field

Enter search here

X

ADD CUSTOM FIELD SEARCH

Calendar selector

Date Picker

CUSTOM FIELDS

CUSTOM FIELD 1:

Date Picker

ADD CUSTOM FIELD SEARCH

ALL FIELDS

January 2017

Su Mo Tu We Th Fr Sa

01 02 03 04 05 06 07

CANCEL

SEARCH

Drop-down menu containing Meeting Bodies

Meeting Body
Combo Box

CUSTOM FIELDS

CUSTOM FIELD 1:

Meeting Body Combo Box

ADD CUSTOM FIELD SEARCH

ALL FIELDS

Election Commission

Financial Committee

Fine Art Commission

Historic Preservation Commission

ARCH

Department Combo
Box

Drop-down menu containing Departments

CUSTOM FIELDS

CUSTOM FIELD 1:

Department Combo Box

ADD CUSTOM FIELD SEARCH

ALL FIELDS

Choose a department

Clerk's Office

Finance

Historic Preservation

Information Technology

ARCH

Drop-down menu containing People

CUSTOM FIELDS

CUSTOM FIELD 1:

People Combo Box

ADD CUSTOM FIELD SEARCH

ALL FIELDS

Pick a person

Brandt Wiza

Amber Ward

Barney Windler

Jeff Schaefer

ARCH

Radio button selection

CUSTOM FIELDS

CUSTOM FIELD 1:

Radio (Yes/No)

Yes

No

X

Text

CUSTOM FIELDS

CUSTOM FIELD 1:

Text Area

Enter search here

X

To add more custom fields to the search, click **Add Custom Field Search** again and make another selection. Use the **X** to the right of any custom field to remove it from the search (click **Reset All Fields** to remove all custom fields you've added). Click **Search** when you're done.

CUSTOM FIELDS

CUSTOM FIELD 1:

☒ Yes ☐ No X

CUSTOM FIELD 2:

 X

[ADD CUSTOM FIELD SEARCH](#)
[RESET ALL FIELDS](#)
[CANCEL](#)
[SEARCH](#)

Custom field searches can be used alone or in conjunction with inputs in the standard fields. If you search using more than one field (standard or custom or a combination), this is an *AND* type search, i.e., to be included in the results, items must contain matching values from all fields into which you enter data.

Notes on Advanced Search

- Searches are not case sensitive.
- Use care when searching for phrases with underscores between words in the **Title** and **Suggested Action** fields. Advanced search will find an item titled "City_Council" by searching for "City_Council" but not when searching only for "City" or "Council" or a partial sub-string of the above.
- Item Title and Suggested Action fields use an *OR* type search if you enter multiple keywords, i.e., search results will include items that contain any one or more of the keywords entered, with best matches containing all entered keywords returned first.
- Item Title and Suggested Action fields use an intelligent search, which will return not only exact matches on English words but root word matches. For example,
 - a search for "Negotiating" would also return items with "negotiate," "negotiation," etc., in the field;
 - a search for "selection" would also return items with "select," "selecting," etc., in the field.
- If you search using more than one field, this is an *AND* type search, i.e., to be included in the results, items must contain matching values from all fields into which you enter data.

[<<< Previous: Navigating the Items Page](#)
[>>> Next: Creating Agenda Items](#)
[Return to Peak help topics](#)

Peak: Agenda Item Details Page

To work with existing agenda items, navigate to the Items page by clicking **Items** in the top menu from anywhere in Peak.

Find the item you need to change by filtering or searching. Click the **pencil** icon in the upper right of the item card of the item you'd like to edit. If you do not see a pencil, you do not have permissions to edit the item. You may see an **eye** icon instead; you'll be able to view the item but not make any changes to it.

Search:

Q

Sort by:

Newest to Oldest

Simple Search

☐

Advanced Search

[Export results to CSV](#)

Show:

All Meeting Bodies

All Dates

All Departments

All Item Types

<<

< PREV

Page 1 of 4

Next >

>>

(153 items match your filters)



IN DRAFT

kdik-213-awd444

Minutes for July 27th

CIVIL SERVICE COMMISSION

2017-12-05

V2



2 ATTACHMENTS

Cover Page Included



IN DRAFT

kdik-213-awd444

Minutes for July 27th

CITY COUNCIL

V1



0 ATTACHMENTS

Cover Page Included

Once you click the **pencil**, you'll be taken to the Agenda Item Details page for that item.

Agenda Item Details

NEW VERSION

APPROVED 2016-212-Granicus
6 CCR 1015-3, Emergency Medical Services, Chapter 5, Air Ambulance Licensing.

ATTACHMENTS 1 ATTACHMENTS **Cover Page Included**

ITEM DETAILS **APPROVAL STATUS** **ITEM HISTORY**

ITEM TITLE *
6 CCR 1015-3, Emergency Medical Services, Chapter 5, Air Ambulance Licensing.

SUGGESTED ACTION

ITEM TYPE * **ITEM ID**

ITEM ACTIVITY newest on top

Join the conversation...

500 characters left

In reference to attachment

ADD COMMENT

"Hear that? No one's said anything about this item. Why not start the conversation?"

CANCEL **SAVE** ☐ Set up Approvals

At the center top of the page is the item card, with details as shown on the Items page. Above it is a **New Version** button. Along the left is a toolbar that allows you to lock and unlock the item, set its status, create a duplicate, view the agenda if the item is associated with one, change the cover page setting, and download the agenda. Beneath the item card are three tabs: **Item Details**, **Approval Status**, and **Item History**. You'll click the appropriate tab depending on what you want to do. On the right, you'll see the Item Activity stream, where users can leave comments about the item.

Item Details Tab

Item Details is the default tab you'll land on when navigating to the page and shows you the same fields you used to create the item, which you can edit as needed if the item is unlocked (Admins and Agenda Coordinators can unlock the item if needed). Click within a field to make changes. Be sure to click **Save** at the bottom right to preserve any changes you've made.

Approval Status Tab

The **Approval Status** tab takes you to the approval workflow if one has been set up for the item. You can view the status of a workflow, or set up and make changes if you have the permissions to do so. [Read more about approval workflows here.](#)

Item History Tab

This tab displays information on the agenda item in ascending order starting with the item's creation. Each time an agenda item is updated, an entry is made. See here for more on the Item History tab.

Please note that the log will contain only those changes that occurred from the July 21, 2017, release forward. Historical data on existing agenda items created before this feature's release will not be available.

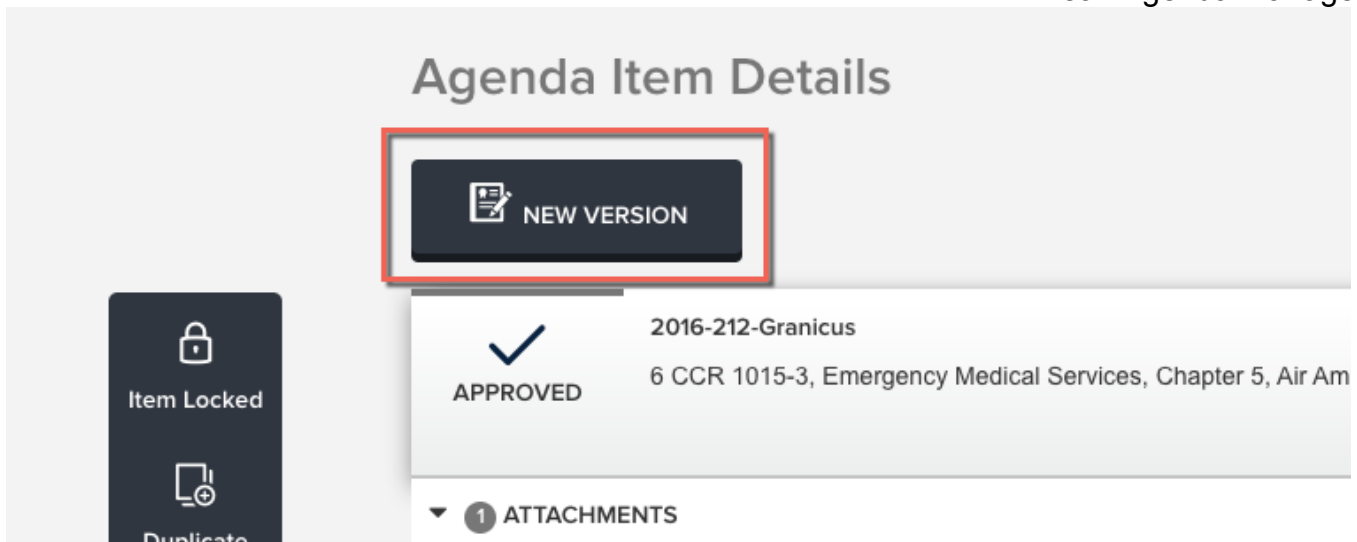
Each entry contains the following:

- The date and time of update
- The name of the user who made the update
- The name of the updated field
- The original value
- The new value

[Read more about what's included in the Item History tab.](#)

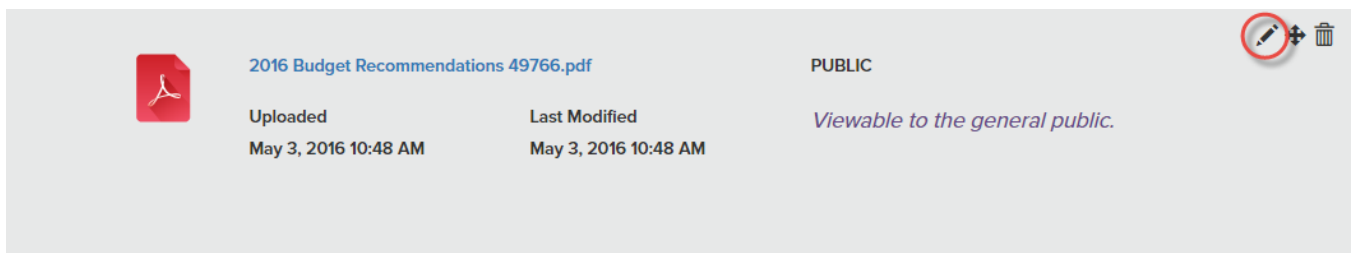
New Version Button

The **New Version** button enables you to create a new version of the agenda item before making changes. This feature is useful for tracking and viewing what changes have been made to your items over time. Distinct from the **Duplicate** function, this option creates a new version of the item with the same agenda item ID; the file can then be modified as desired while the original version is retained. All agenda items start out with a version number of V1, which will be considered the original or “parent” version. Each subsequent version number is increased by 1. You can navigate between versions using the navigation menu and clicking **Prev** or **Next** or clicking the number of the version you wish to view. [Read more about the New Version function here.](#)

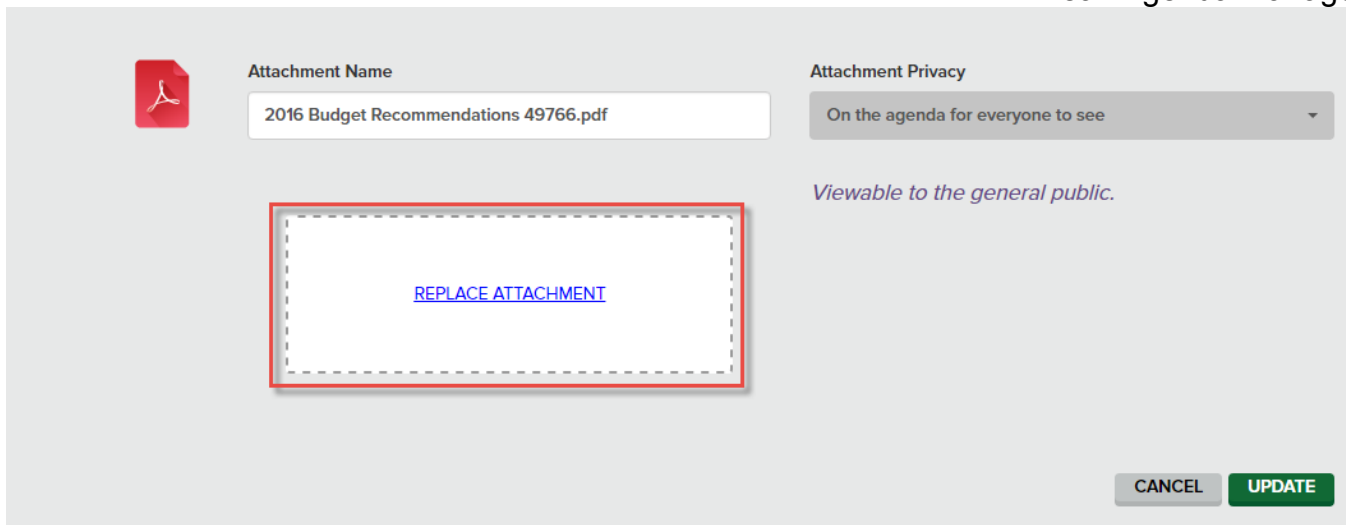


Replacing Attachments

To replace an existing attachment, click the **edit** (pencil) icon on the attachment.



You'll see a **Replace Attachment** link, which you can click to browse your computer for a file, or drag and drop a file over the link. The file can have the same or a different name. Click **Update** to replace the old attachment with the current one.



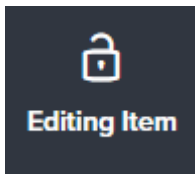
The screenshot shows a form for uploading an attachment. On the left is a red PDF icon. To its right is the 'Attachment Name' field containing '2016 Budget Recommendations 49766.pdf'. Further right is the 'Attachment Privacy' dropdown menu, currently set to 'On the agenda for everyone to see'. Below the name field is a large dashed rectangular box with a red border, containing the text 'REPLACE ATTACHMENT' in blue. To the right of this box, the text 'Viewable to the general public.' is displayed. At the bottom right are two buttons: 'CANCEL' (grey) and 'UPDATE' (green).

Left Menu Options

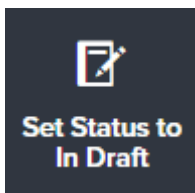
The menu on the left enables you (if you have the proper permissions) to lock or unlock an item, set an item to approved to to draft, duplicate the item, and view the agenda of the meeting with which it's associated.

Feature

Description



If the item is being edited, the padlock icon will display as unlocked with the text **Editing Item**. Click to lock the agenda item and prevent further changes. When the item is locked, the padlock will display as closed and the text will read **Item Locked**. Click to unlock the item (Agenda Coordinators and Peak Admins only).



If the item is in draft, there will be an option to **Set to Approved**, which enables you to approve an item without an approval workflow. If the item is approved, you can move it back to draft status by clicking **Set Status to In Draft**.

Note: The users to which this button is available depends on the setting on the [Site Settings](#) page in Admin. If the Peak Admin has not made this function available to your user role, the button will not display.

Feature	Description
 Duplicate Item	This action creates an item with the same metadata, attachments, and approval workflow phases, if any. The item is assigned a new Agenda Item ID, and the Meeting Date and Sections fields will be blank. The Drafter field should be updated by an Admin or Agenda Coordinator to reflect the name of the drafter using the copy.
 View Agenda	If the item has been assigned to a section of an agenda, you can click View Agenda to be taken to the Meeting Agenda page for the associated meeting.
 Cover Page Included	Use this button to control whether the item will have a cover page in item packets as well as agenda packets for agendas that contain this item. The default for this setting is controlled on the Site Settings page, but you can change it here. Click to exclude the cover page. If someone downloads an agenda packet from the agenda details view and elects to include cover pages, any agenda items with cover pages individually excluded will not have a cover page. If you don't have one set up, contact Customer Care to request an Agenda Item Cover Page template for your system.
 Download	This button gives you the option to download the agenda item's cover page in DOC or PDF format. Also referred to as a staff report, summary report, or item memo, cover pages contain all the information included on the Item Details page. You can also generate an agenda item packet for the public or for council.

Comments

The Item Activity stream on the right side of the page enables drafters and others in the item's workflow to make comments about the item and suggest changes. Click the **Join the conversation...** field and type your comment, then click **Add Comment**.

ITEM ACTIVITY

newest on top

Join the conversation...

500 characters left

ADD COMMENT

"Hear that? No one's said anything about this item. Why not start the conversation?"

The comment displays in the activity stream, and an email notification will be sent to the item's drafter. [Read more details about email notifications here](#). You can edit or delete your own comments using the **pencil** and **trash can** icons. After editing, click **Update Comment** to save the changes.

BRYNN WARRINER
We need to attach the budget recommendations document.

created at 10:39 am on May 03, 2016
updated at 10:41 am on May 03, 2016

If there are files attached to the agenda item, there will be a drop-down menu below the comment field. If your comment relates to an attachment you can select it from the menu.

ITEM ACTIVITY

newest on top

Document has been added

475 characters left

2016 Budget Recommendations 49766.pdf

ADD COMMENT

TODAY

BRYNN WARRINER

We need to attach the budget recommendations document.

created at 10:39 am on May 03, 2016

updated at 10:41 am on May 03, 2016

The comment displays in the stream with a link to the attachment you've referenced.

TODAY





JANE SMITH
Document has been added.
*This was made in reference to 2016 Budget Recommendations 49766.pdf
created at 10:54 am on May 03, 2016*



BRYNN WARRINER
We need to attach the budget recommendations document.
*created at 10:39 am on May 03, 2016
updated at 10:41 am on May 03, 2016*

[<<< Previous: Creating Agenda Items](#)

[>>> Next: Creating a New Version of an Agenda Item](#)

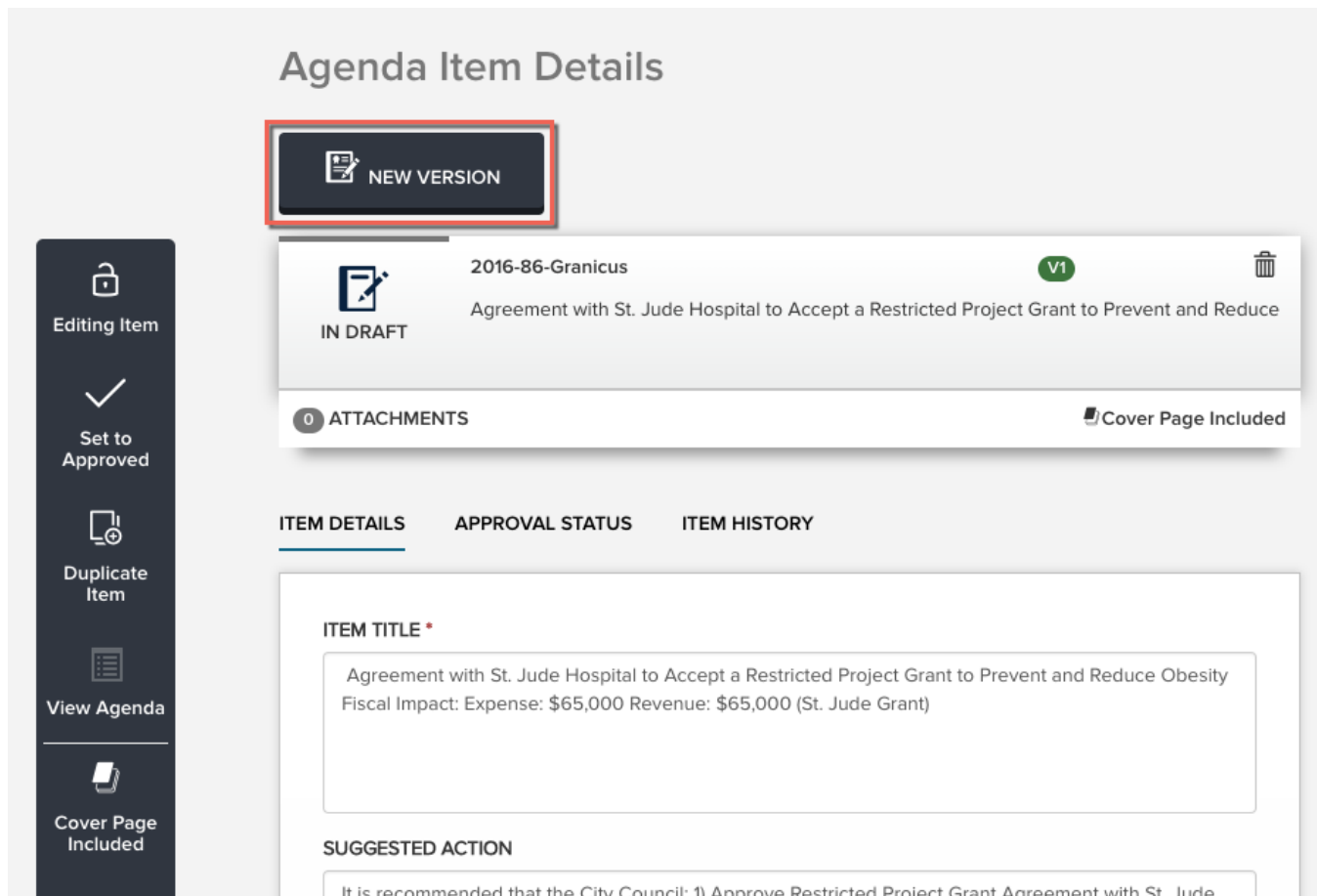
[Return to Peak help topics](#)

Creating a New Version of an Agenda Item in Peak

The **New Version** button enables you to create a new record of an agenda item before making changes. This feature is useful for tracking and viewing what changes have been made to your items over time. It also allows you to leave an agenda item associated with a past meeting while creating a new version you can place on a future meeting if the item was referred, tabled, or amended.

Different from the **Duplicate** function, this option creates a new record of the item with the same agenda item ID; the file can then be modified as desired while the original record is retained.

From the Agenda Item Details page, click the **New Version** button. Note that this action is available only on the most recent version of an item, and only if the item is not in an active approval workflow.



Agenda Item Details

NEW VERSION

2016-86-Granicus **V1**

IN DRAFT

Agreement with St. Jude Hospital to Accept a Restricted Project Grant to Prevent and Reduce

0 ATTACHMENTS **Cover Page Included**

ITEM DETAILS **APPROVAL STATUS** **ITEM HISTORY**

ITEM TITLE *

Agreement with St. Jude Hospital to Accept a Restricted Project Grant to Prevent and Reduce Obesity
Fiscal Impact: Expense: \$65,000 Revenue: \$65,000 (St. Jude Grant)

SUGGESTED ACTION

It is recommended that the City Council: 1) Approve Restricted Project Grant Agreement with St. Jude

Peak will ask you to confirm that you'd like to create a new version. Click **Yes, Create New Version** to proceed.



Creating a new version of the item copies over all of the item details, but you can edit these details as you wish.

Are you sure you wish to create a new version of the item ' Agreement with St. Mark Hospital to Accept a Restricted Project Grant to Prevent and Reduce Obesity Fiscal Impact: Expense: \$65,000 Revenue: \$65,000 (St. Mark Grant) '?

YES, CREATE NEW VERSION

NO, RETURN TO THE ORIGINAL ITEM

This action takes you to the Agenda Item Details page for the new version of the item. Note that the item has the same agenda item ID, the same content, and the same attachments. Workflows, however, are not copied to the new record. Creating a new version will copy the item's drafter, regardless of who is creating the new version. After a new record is created, the status will be set to IN DRAFT, and the item will be unlocked.

Once a new version has been made, there will be a navigation bar at the top of the Agenda Item Details page that enables you to move between versions by clicking **Prev** or **Next** or clicking the number of the version you wish to view.

Agenda Item Details

 **NEW VERSION**

[< PREV](#) | [1](#) | **[2](#)** | [NEXT >](#)

 **IN DRAFT**

2016-86-Granicus V2 

Agreement with St. Jude Hospital to Accept a Restricted Project Grant to Prevent and Reduce

0 ATTACHMENTS  **Cover Page Included**

All agenda items start out with a version number of V1, which will be considered the original or “parent” version. Each subsequent version number is increased by 1. You can find the version number on the item card on the Items page or the Item Details page. The most current version number will be highlighted in yellow.

Editing a Version of an Agenda Item

The most recent version is considered the current one and is editable. All previous versions of the item will be locked by default but can be unlocked by an Admin or Agenda Coordinator.

Once you create a new version of an agenda item, you'll have the same editing capability that existed for the original item. Separate versions are unique items even though they have the same agenda item ID; changes made to the new version do not change any of the information on the original item or other versions of the item.

Deleting a Version of an Agenda Item

You can use the **trash can** icon to delete the version as long as both of these conditions are met:

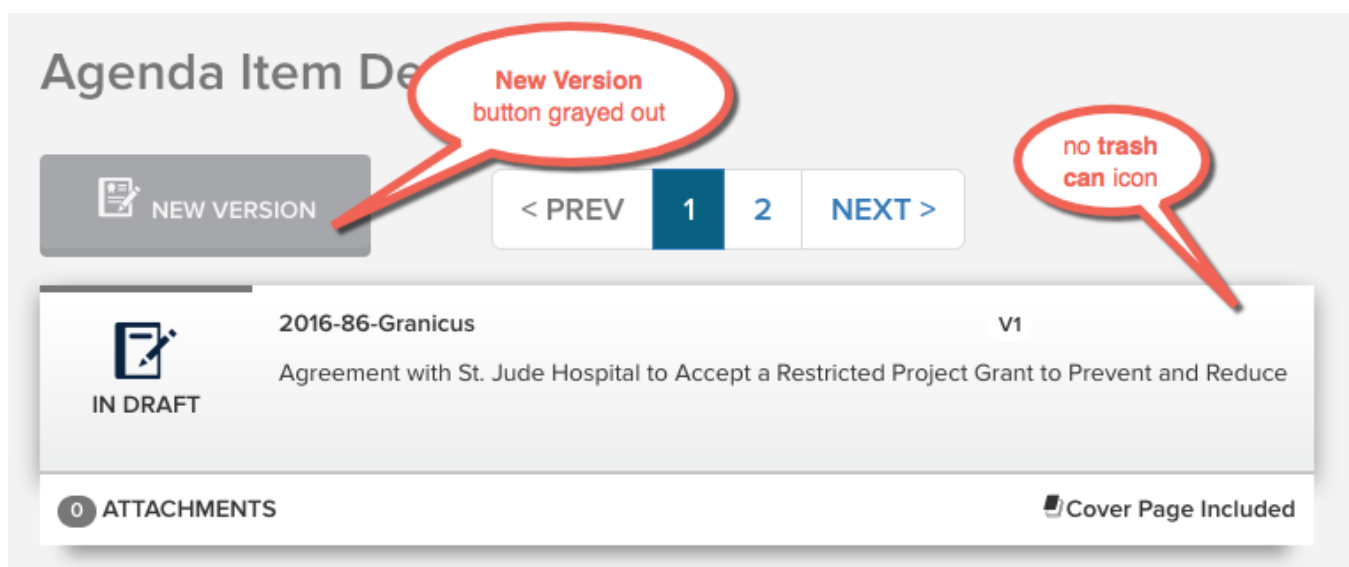
1. The item is the current version (it has the highest number).
2. The version is not associated with a meeting.

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

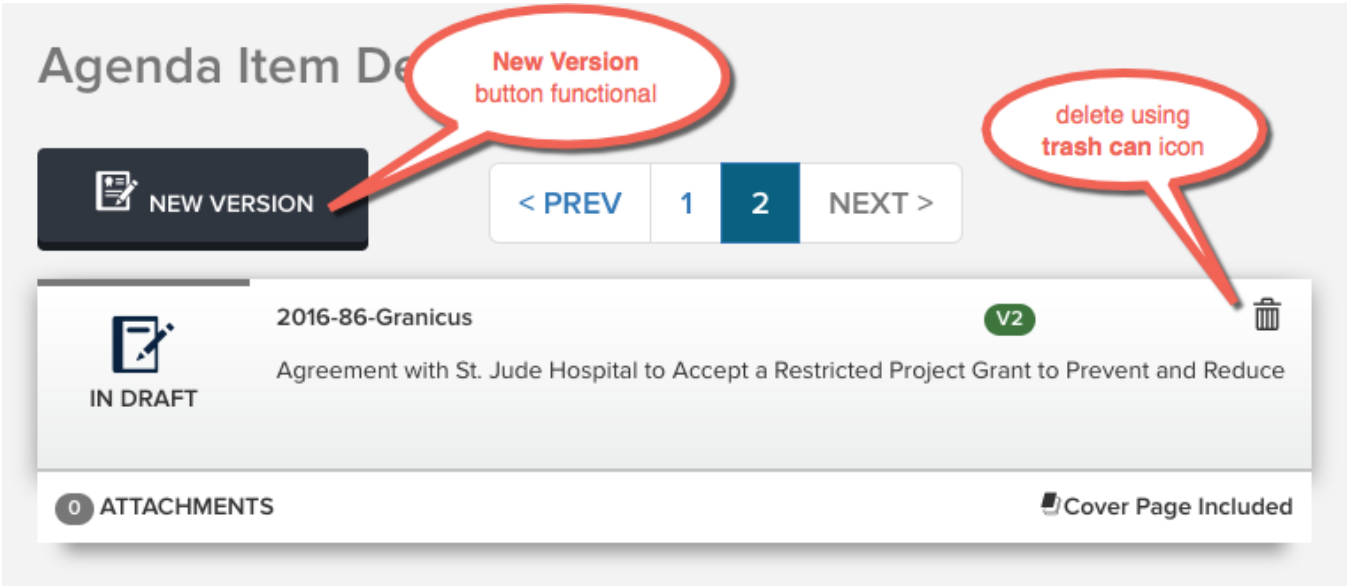
You can delete the unscheduled current version of the item either from the Agenda Item Details page or from the Items page.

- If you click the **trash can** icon from the Agenda Item Details page, you'll be prompted with a confirmation.
- If you delete the current item from the Items page, you'll be prompted with a confirmation including the version and agenda item title of the item you're about to delete.

Note: Deleting a version does not delete the original agenda item, only that version of it. Once it is deleted, the next-highest-numbered version of the item becomes the "current" item, and it too can be deleted provided it is not assigned to a meeting. You can continue all the way through V1.



V1 (original version; item is locked and no deleting or versioning is allowed)



V2 (most recent version; you can delete or create a new version of the item)

[<<< Previous: Editing Agenda Items](#)

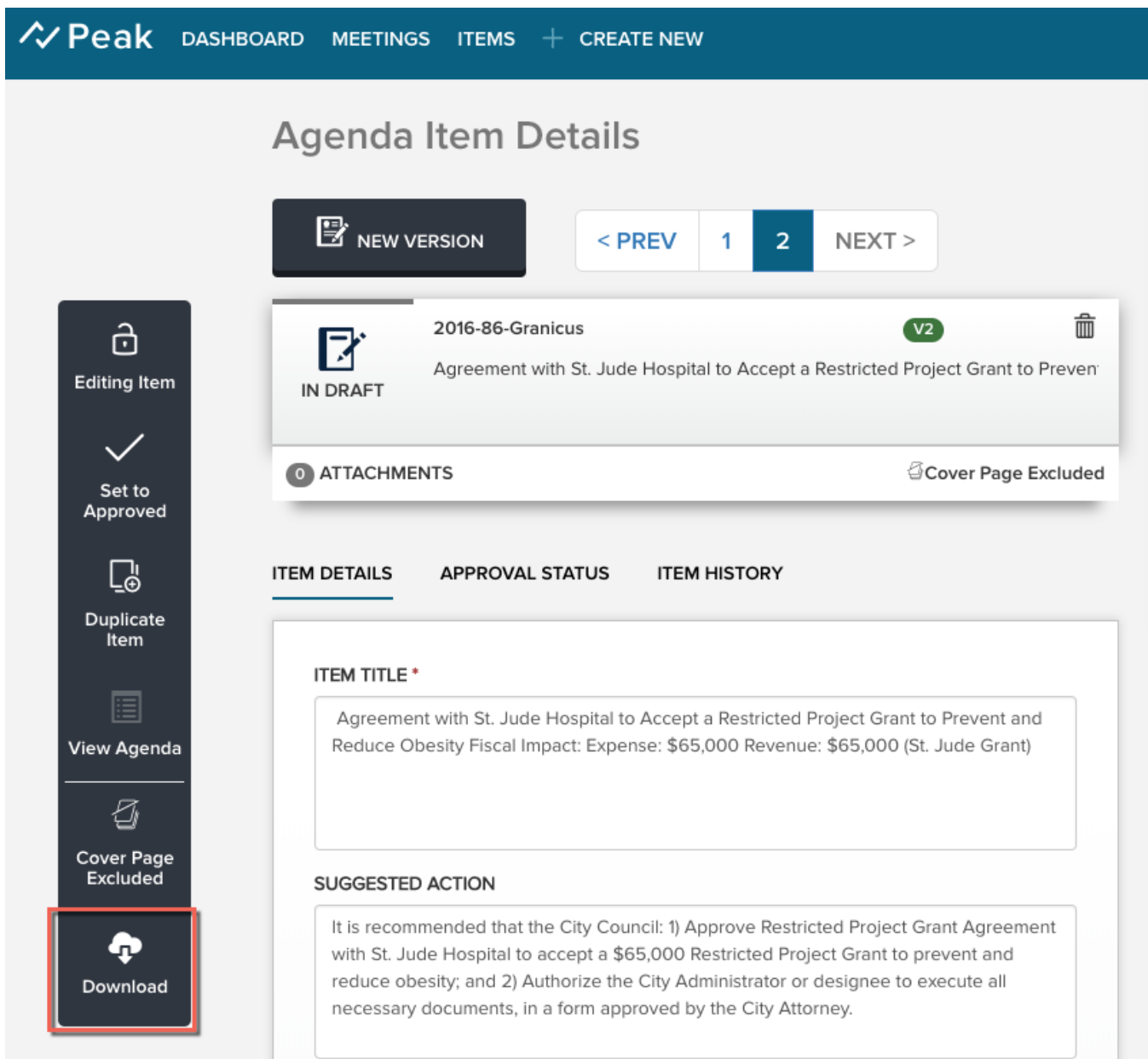
[>>> Next: Generating Agenda Item Packets](#)

[Return to Peak help topics](#)

Generating Agenda Item Packets in Peak

Administrators, Agenda Coordinators, and Drafters can generate an agenda item packet for a given agenda item. Packets can be created for the public or for council and will contain the cover page along with attachments as ordered on the agenda item. You can generate this packet from the Agenda Item Details page using the toolbar on the left side of the page.

1. From the Agenda Item Details page, click **Download** in the toolbar on the left.



Peak DASHBOARD MEETINGS ITEMS + CREATE NEW

Agenda Item Details

 NEW VERSION

< PREV 1 **2** NEXT >

 2016-86-Granicus V2 

IN DRAFT Agreement with St. Jude Hospital to Accept a Restricted Project Grant to Preven

0 ATTACHMENTS  Cover Page Excluded

ITEM DETAILS APPROVAL STATUS ITEM HISTORY

ITEM TITLE *

Agreement with St. Jude Hospital to Accept a Restricted Project Grant to Prevent and Reduce Obesity Fiscal Impact: Expense: \$65,000 Revenue: \$65,000 (St. Jude Grant)

SUGGESTED ACTION

It is recommended that the City Council: 1) Approve Restricted Project Grant Agreement with St. Jude Hospital to accept a \$65,000 Restricted Project Grant to prevent and reduce obesity; and 2) Authorize the City Administrator or designee to execute all necessary documents, in a form approved by the City Attorney.

Editing Item

Set to Approved

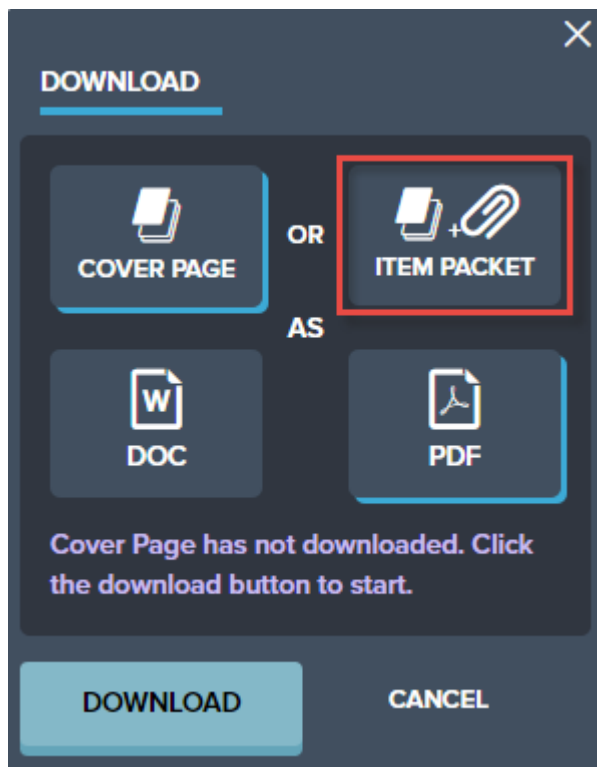
Duplicate Item

View Agenda

Cover Page Excluded

Download

- The download popup menu displays, giving you the option to download a cover page only (in DOC or PDF format), or an item packet with attachments. Click **Item Packet**.



- Select whether you'd like to generate packet for the public, with public attachments only, or a packet for council, which will also include attachments marked as **Private**.

Note: The attachment indicator below the **Generate Packet** button will show you whether all non-PDF attachments on agenda items belonging to this agenda have been converted to PDF. It will also indicate whether PDF attachments are ready for collation.

- If the indicator is still red, a packet can be generated, but the agenda report/cover page report links for any attachments that have not yet converted will still link to the native form (e.g., DOCX) of the file
- Non-converted files and any PDFs that were flagged will not be collated with the packet

Click the indicator to see a list of files that have successfully converted and those that have not, and refresh the indicator until all files that are not ready have been marked as converted

DOWNLOAD

COVER PAGE OR **ITEM PACKET**

☒ **FOR PUBLIC** THIS WILL NOT INCLUDE ITEM ATTACHMENTS MARKED CONFIDENTIAL

☒ **FOR COUNCIL** THIS WILL INCLUDE ALL ATTACHMENTS

PUBLIC PACKET HAS NOT BEEN GENERATED.

GENERATE PACKET

All attachments ready for packet generation.

Packet has not been generated. Click the generate button to start.

DOWNLOAD **CANCEL**

4. Click the **Generate Packet** button. Note that the **Download** button is not functional until your packet has generated.
5. Once the packet generation is complete, the text below the **Generate** button will let you know that the packet is ready for download, and the Download button will no longer be grayed out. Click **Download**.

DOWNLOAD

COVER PAGE OR ITEM PACKET

☒ FOR PUBLIC THIS WILL NOT INCLUDE ITEM ATTACHMENTS MARKED CONFIDENTIAL

☐ FOR COUNCIL THIS WILL INCLUDE ALL ATTACHMENTS

PUBLIC PACKET
LAST GENERATED: JANUARY 25, 2018

GENERATE PACKET

All attachments ready for packet generation.

Your item packet is now ready for you to download. Click the button below.

DOWNLOAD CANCEL

The packet generates as a PDF and contains the item's cover page (if set to be included) along with attachments as ordered on the agenda item.

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

The agenda item and each attachment are bookmarked in the packet. The bookmark title will depend upon which option is selected in Admin via the [drop-down menu on the Site Settings page](#). Pages in the item packet are numbered consecutively starting at **1** in the bottom right corner.

You can elect to have current approval workflow information display on the cover page report. This information includes the following:

- item state

- when the workflow was added
- when a phase was added
- when a user was added to a phase by an editor or by delegation
- whether an approver approved an item or was an FYI only
- whether a phase was skipped or completed normally

You can also elect to have agenda item numbers added to your cover page reports for those items that are associated with an agenda. Contact [Granicus Customer Care](#) to request samples of the available layouts if you'd like this information added to your cover pages.

Note: For full functionality with agenda packets, ensure that you do not have pop-up blockers enabled on your browser.

[<<< Previous: Amending an Agenda Item](#)

[>>> Next: Viewing the Dashboard](#)

[Return to Peak help topics](#)

Peak Activity Stream Automatic Notification Emails

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

Whenever a comment is added to an agenda item, the drafter-owner receives an email identifying who made the comment, the agenda item's ID and title, and the text of the comment. Whether other users receive notification is determined by whether an item contains an inflight workflow:

- During an inflight workflow, when a comment is made, email notification of this comment is sent to the drafter of the item, any previous commenters, and all approvers and FYlers in the current and previous phases of the workflow. Approvers and FYlers on future phases of the workflow who do not meet the aforementioned qualifications are not notified.
- If an item does not contain an inflight workflow, the drafter-owner or any person who has previously commented will receive an email when a comment is added.

A link is provided in the email, which when clicked will take the user to the agenda item.

[See here for automatic notification emails related to approval workflow.](#)

[Return to Peak help topics](#)

Peak Item History Tab

The Item History tab is found on the Agenda Item Details page for an agenda item and displays information on changes to the agenda item in ascending order starting with the item's creation. Each time an agenda item is updated, an entry is made.

Please note that the log will contain only those changes that occurred from the July 21, 2017, release forward. Historical data on existing agenda items created before this feature's release will not be available.


DASHBOARD
MEETINGS
ITEMS
+ CREATE NEW

Agenda Item Details

 NEW VERSION

 Editing Item

 Set to Approved

 Duplicate Item

 View Agenda

 Cover Page Included

 Download

 IN DRAFT

2016-212-Granicus V1
 6 CCR 1015-3, Emergency Medical Services, Chapter 5, Air Ambulance Licensing.

 1 ATTACHMENTS

 Cover Page Included

ITEM DETAILS

APPROVAL STATUS

ITEM HISTORY

granicus added attachment 'FSA-Eligible-Products-List.pdf' on: Tuesday, December 19th 2017, 12:10:11 pm

granicus created an approval workflow for this item: Tuesday, December 19th 2017, 12:10:39 pm

granicus made the following changes on: Tuesday, December 19th 2017, 12:10:41 pm:

- Changed: Phase - (the phase has been deleted)
 Original Value: Pending
 Updated Value: In Progress
- Changed: status
 Original Value: Approved
 Updated Value: In Review

Each entry under the tab contains the following:

- The date and time of update
- The name of the user who made the update
- The name of the updated field
- The original value
- The new value

Included Changes

Changes to the following are logged:

- All standard and custom fields, as well as changes to any attachments (privacy setting changes and added or deleted attachments) on an agenda item
- Item status changes (Draft/In Review/Approved) through workflow initialization, restart, or completion; or by manual action via the **Set To Approved** or **Set to In Draft** buttons
- Locking and unlocking of an item through manual action via the button, or by automated action (creating a new version or reaching final approval)
- Addition of a comment (if a comment is edited, the content of the comment will be updated on the corresponding creation entry for the comment)
- Workflow processing, including additions or deletions of approvers, workflow initialization, approval, delegation, phases complete or skipped, workflow complete, and workflow removed via restart workflow or remove template actions

Related updates are grouped under a common header—this includes changes that occur within a single save action and can be changes to multiple fields (standard and custom) and changes to attachments (level of privacy, name, order). Actions that do not require saving (adding, removing, replacing an attachment; including/excluding the cover page; locking/unlocking) are logged as separate events and are not grouped with other edits.

New Versions and Duplicate Items

If a new version of an item is created, the source version will log an entry that indicates the item is locked and that a new version has been created. The new version will contain a separate item history, which will begin with an entry indicating the new version's creation.

If a duplicate of an item is created, the source item will log an entry indicating the duplication. The duplicate agenda item will contain a separate and distinct item history, which will begin with an entry indicating the duplicate entry's creation.

Notes and Exceptions

For workflow processing, when an item is approved either by final approval or by skipping the final phase of a workflow, an item is automatically locked. These events are grouped together along with a state change of the final phase of the workflow. However, if the **Set to Approved** button is used, an item is also auto-locked. These will appear as separate events in the log. The auto-lock will appear in this case as initiated by the user when in fact it was completed automatically by the system. Even though the events are not grouped, the time stamps of the events can be used to coordinate dependent events.

Nothing is logged in the item history for renaming or reordering of phasing, but updated phase names are used in the item history for those events involving the phase. Adding or deleting a phase is not specifically logged, but addition of approvers to those phases are, as are deletion of approvers from a deleted phase. Since the workflow history is built each time the page is loaded, removing pre-existing workflows or phases on items will leave gaps in previous history events.

Peak Agenda Management: Approval Workflow

Read about Peak's Approval Workflow feature and learn how to set up and modify workflows.

Peak Workflow

[Setting Up Approval Workflows](#)

[Peak Approval Workflow Features](#)

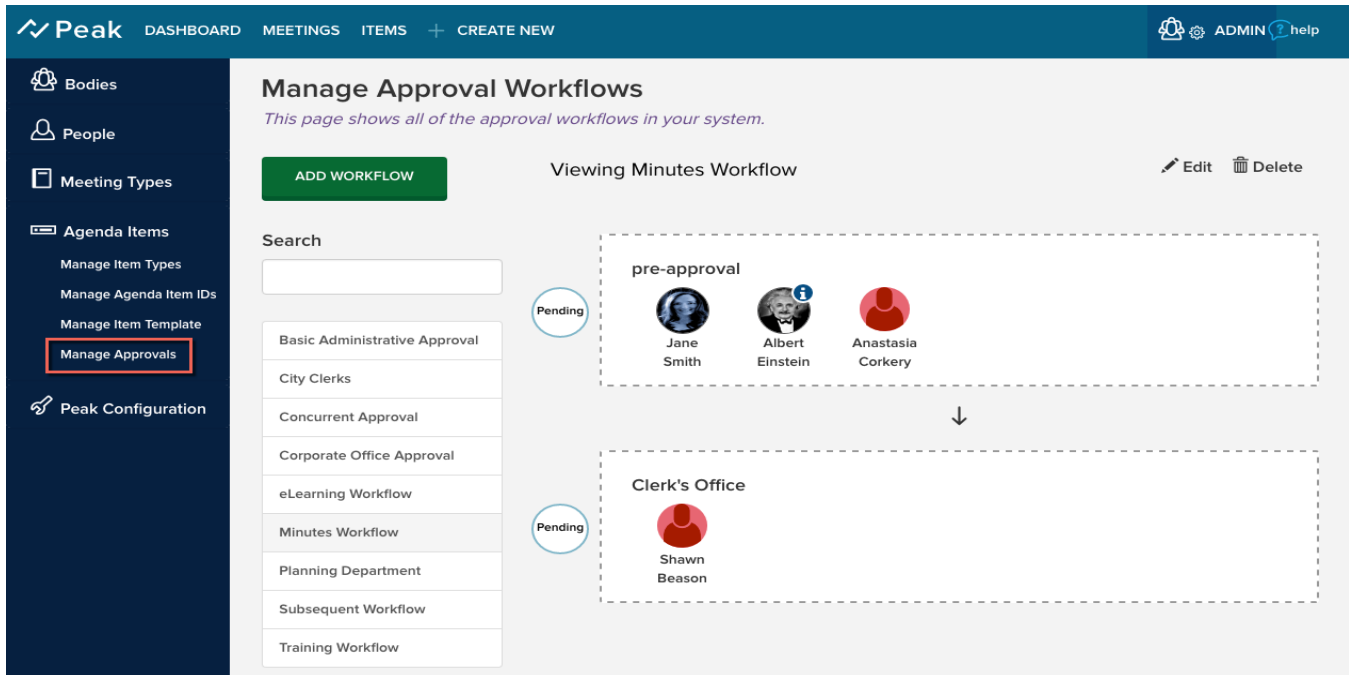
Email Notifications

[Approval Workflow Email Notifications](#)

Managing Approval Workflows

The [workflow functionality](#) in Peak enables agenda item drafters to create and submit their items through a sequential or concurrent workflow. Workflows can be set up while drafting agenda items via the Agenda Item Details page. Workflows can be deleted by Peak Admins only. Admins can also set up and edit workflows.

To manage workflows, click **Admin** in the upper right-hand corner. Choose **Agenda Items** from the menu on the left, then select **Manage Approvals**. **Note:** Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Peak DASHBOARD MEETINGS ITEMS + CREATE NEW ADMIN help

Manage Approval Workflows
This page shows all of the approval workflows in your system.

ADD WORKFLOW Viewing Minutes Workflow Edit Delete

Search

Basic Administrative Approval
City Clerks
Concurrent Approval
Corporate Office Approval
eLearning Workflow
Minutes Workflow
Planning Department
Subsequent Workflow
Training Workflow

pre-approval
Pending
Jane Smith
Albert Einstein
Anastasia Corkery

↓

Clerk's Office
Pending
Shawn Beason

1. To add a workflow, click the green **Add Workflow** button. The following fields display:

Manage Approval Workflows

This page shows all of the approval workflows in your system.

ADD WORKFLOW

Search

- Basic Administrative Approval
- City Clerks
- Concurrent Approval
- eLearning Workflow
- Minutes Workflow
- New Approval

Editing New Approval

Assign Workflow To: ☐ User ☐ Department

Heads up: Approval workflows without an owner are available to all Drafters and Coordinators

Approval Name

New Approval

Approval Description

Please enter an Approval Description

Pending

You must give this phase a name.

You must have at least one approver in a phase.

Delete

2. Decide whether this workflow should be assigned to an individual or departmental owner by selecting the **User** or **Department** radio button. Leave these deselected if you want the workflow available to all. Click **Clear** if you've selected a button and want to deselect it.

If a workflow is assigned to an individual, the workflow will be available only to that user. If a workflow is assigned to a department, the workflow will be available only to users who are part of the department (users can be associated to a department via [People records](#)).

Editing Corporate Office Approval

Assign Workflow To: ☐ User ☒ Department [Clear](#)

Select Department:

Clerk's Office

Delete

If you do not assign the workflow an owner, it will be available to all Drafters and Agenda Coordinators.

3. Add a name for your workflow in the **Approval Name** field. The workflow is named "New Approval" by default. You can also enter a description of the workflow in the **Approval Description** field.

Editing Corporate Office Approval 🗑️ Delete

Assign Workflow To: ☐ User ☒ Department [Clear](#)

Select Department:

Mayor's Office ▼

Approval Name

Corporate Office Approval

Approval Description

Please enter an Approval Description

4. To create your first phase, click the **pencil** icon in the corner of the unnamed phase.

Pending

You must give this phase a name.

You must have at least one approver in a phase.

✎️ ➕ 🗑️

5. Click the **Phase Name** field and type a name for the first phase. Then click the **Add Approver** button.

Pending

Phase Name ✓ ✕

1 - Pre-approval

239 characters left

+ ADD APPROVER

You must always have at least one approver in a phase. If you need to remove this approver, please add another first.

6. Select the name of your first approver from the drop-down menu. You can also type directly in the field to narrow the choices. Choose whether you want this person to be an **Approver** or **FYI Only** by clicking the corresponding button. FYI Only are people who are a part of the workflow but are not required to approve the file; they'll be able to view details of the agenda item, including attachments, for informational purposes. Click the green **Add** button to add the selected approver.

Phase Name

1 - Pre-approval

239 characters left

Approver FYI Only

Add Approver

Barry Johnson
barryj@granicus.com

Brandon Weninger
brandon.weninger@granicus.com

ADD

Cancel

Pending

7. The approver's name and avatar now display on the phase. You can add multiple approvers to a single phase, or use one approver on each phase to create a specific sequence for the workflow to follow. Repeat step 4 to add more approvers to this phase. You can delete approvers using the red **x** on the associated avatar. When you're done with the first phase, click the green **checkmark** in the upper right-hand corner of the phase box.

Phase Name

1 - Pre-approval

239 characters left

ADD APPROVER

Marisa Rodriguez

Jane Smith

Pending

8. To add another phase, click the **plus sign (+)** underneath an existing phase.

1 - Pre-approval

Marisa Rodriguez

Jane Smith

Pending

9. Once a phase is added, you can use the **pencil**



to edit it, the **arrows**



to drag and drop into a new order, and the **trash can**



to delete.

10. When you've added all the phases you need, click the green **Save** button at the bottom right of the page.

Editing Corporate Office Approval

Delete

Assign Workflow To: ☐ User ☒ Department [Clear](#)

Select Department:

Mayor's Office

Approval Name

Corporate Office Approval

Approval Description

Please enter an Approval Description

Pending

1 - Pre-approval

Marisa Rodriguez

Jane Smith

2 - Clerks' Office

Shawn Beason

Gertrude Stein

Albert Einstein

CANCEL

SAVE

The new approval workflow displays in the list of workflows on the left. It will also be available in the **Select a workflow** drop-down menu under the approval status of an agenda item. If it is not assigned an owner, it will be available to everyone; if it has an owner, it will display to the person assigned or to the members of the department assigned.

You can also edit and delete workflows from this page. Click the name of the workflow in the list, then click **Edit** or **Delete** in the upper right-hand corner to take the desired action.

Manage Approval Workflows

This page shows all of the approval workflows in your system.

ADD WORKFLOW

Viewing Corporate Office Approval

 Edit
  Delete

Search

Basic Administrative Approval

City Clerks

Concurrent Approval

Corporate Office Approval

eLearning Workflow

Minutes Workflow

Planning Department

Subsequent Workflow

Training Workflow

Pending

1 - Pre-approval

 Marisa Rodriguez
  Jane Smith

↓

Pending

2 - Clerks' Office

 Shawn Beason
  Gertrude Stein
  Albert Einstein

If you choose to delete a workflow, you'll get a confirmation message that allows you to cancel if you clicked **Delete** in error.

Deleting this approval workflow will remove it from Peak. You will no longer be able to select this approval workflow for agenda items.

Are you sure you'd like to delete this approval workflow?

DELETE WORKFLOW

No, Cancel

Note: Neither deleting nor editing a template will affect any historical data, i.e., it will not affect the workflow for current or past agenda items using a workflow that has since changed or been eliminated. The changes are available for use on

subsequent approval workflows, but in-process workflows will remain the same unless stopped and assigned a new workflow.

Automatic emails are sent to participants in an approval workflow. [Read details about notification emails.](#)

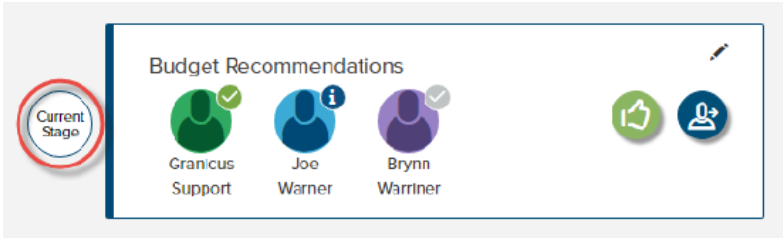
[<<< Previous: Customizing the Item Template](#)

[>>> Next: Configuring Site Information](#)

[Return to Peak help topics](#)

Peak Approval Workflow Features

The [workflow functionality](#) in Peak enables drafters to create and submit an agenda item through a sequential or concurrent workflow. The table below outlines key features of the review process:

Feature	Description
Approval phases	Approval phases allow you to create sequential or parallel workflows. Each phase has to be completed before it moves to the next phase. The circle on the left indicates whether the stage is Current, Approved, or Skipped. 
Approvers	Approvers are people assigned to approve an item. Everyone assigned to a phase must approve before that phase is considered complete. The checkmark icon above the avatars indicates whether the person has approved the item: green indicates approval; gray indicates waiting on approval. 
FYI	FYI approvers are users that are assigned to the workflow for informational purposes but are not required to approve the item. They are denoted by the blue-and-white i icon above the avatar.



Skip To Next

The **Skip to Next** option allows the current Drafter of the item, an Agenda Coordinator, or a Peak Admin to skip the current phase. This action bypasses any remaining approvers in the current phase and generates emails informing them that their approval is no longer needed. The workflow moves to the next phase.

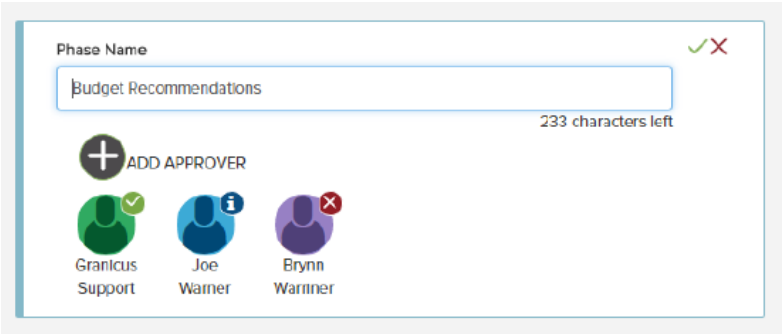


You can edit current and subsequent workflow phases after the workflow has been initiated by clicking the **pencil** (



) in the upper right-hand corner of the phase box. The red **x** icon above an avatar allows you to delete any approvers who have not yet taken action. Click the **x** to remove the approver. Once approvers have approved an item, they can no longer be deleted. You can also add additional approvers by clicking **Add Approver**. When you're done editing, click the green **checkmark** to save your changes. Completed phases cannot be edited.

Edit In-flight Workflow



Approvers click the green **thumbs up** button to approve the item.

Thumbs Up button



Approvers click the blue **delegate** button to delegate their approval to another user.

Delegate button



To delegate your approval to another person, click the **delegate** button shown above. The modal shown below will open. Choose a delegatee from the drop-down menu, then click the green **Delegate** button. The new approver shows up in your place on the workflow phase, and the delegatee and drafter of the item will both receive emails informing them of the change.

Delegate modal

×

Select a delegatee from below and click the DELEGATE button.

▼

DELEGATE

Cancel

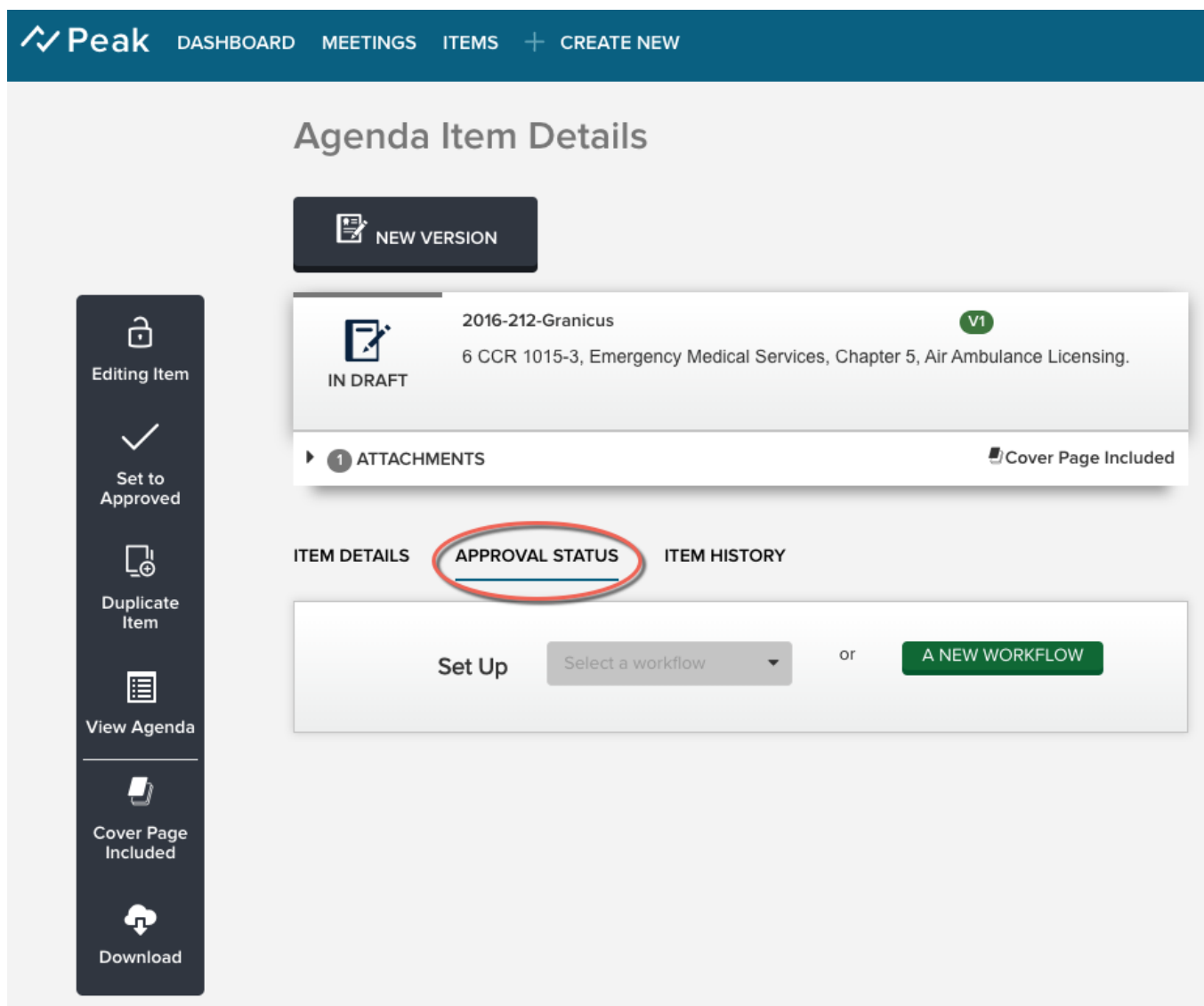
Peak sends emails throughout the workflow process to participants/assignees to request approvals and alert about various actions, e.g., an approval has been delegated, a phase is canceled, or an approver has been removed. [See specifics about Peak's automated workflow approval emails.](#)

[<<< Previous: Setting Up Approval Workflows](#)

[Return to Peak help topics](#)

Setting up Approval Workflows in Peak

Once you've [created an agenda item](#), you have the option to set up an approval workflow for it. There are two ways to set up approvals for a particular item: 1) when creating a new agenda item, and 2) when editing a previously created item. In either case, before you click the **Save Item** button, select the **Set up Approvals** checkbox. The approval workflow setup process will then initiate as soon as you click **Save**, and you'll go to this page. You can also arrive here by clicking directly on **Approval Status** just above the item details:



Peak DASHBOARD MEETINGS ITEMS + CREATE NEW

Agenda Item Details

NEW VERSION

IN DRAFT 2016-212-Granicus V1
6 CCR 1015-3, Emergency Medical Services, Chapter 5, Air Ambulance Licensing.

▶ **1 ATTACHMENTS** Cover Page Included

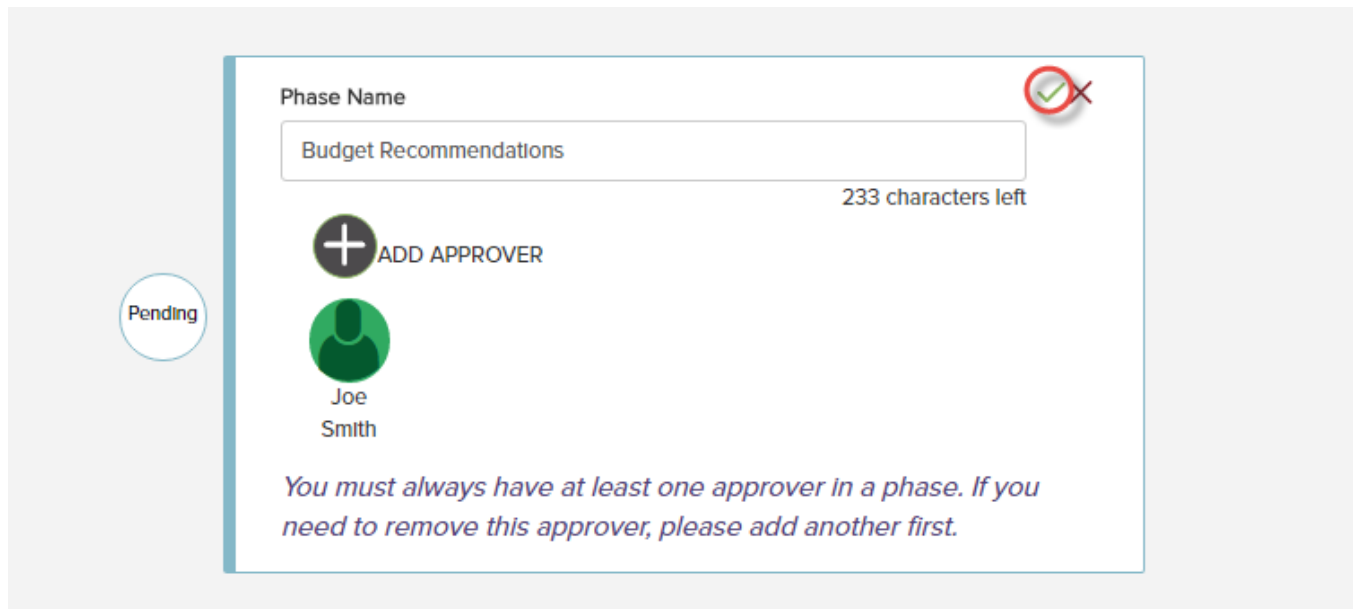
ITEM DETAILS **APPROVAL STATUS** ITEM HISTORY

Set Up Select a workflow ▼ or **A NEW WORKFLOW**

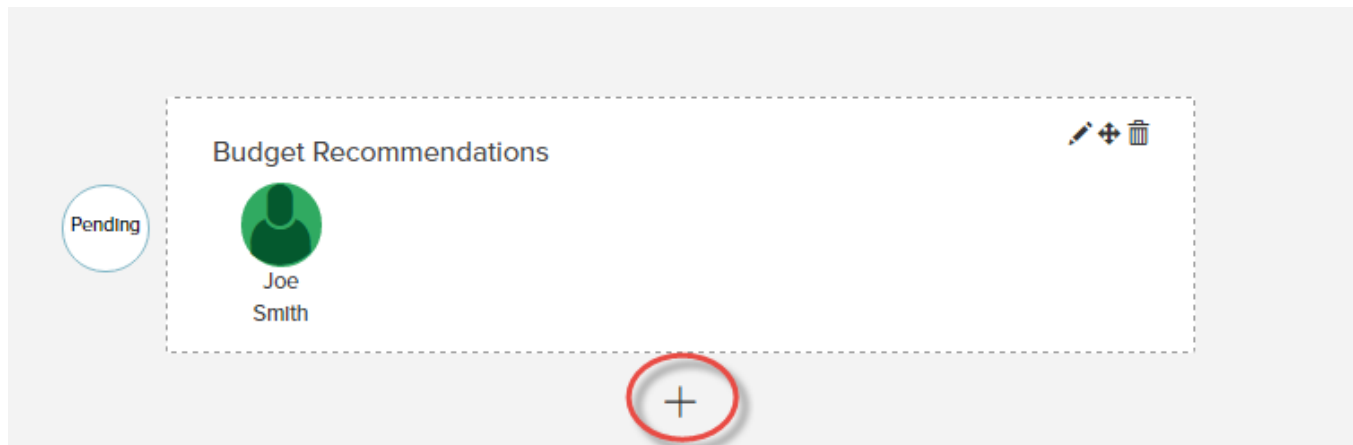
1. Decide whether you want to use a saved workflow or set up a new one.
 - To select an existing workflow, click the **Set Up** drop-down menu and choose the workflow you want to reuse. You can edit an existing template, but you must then save it as a new workflow if you want your updated version to be available for future use. [Workflow templates can be deleted only by a Peak Admin](#) via **Admin > Agenda Items > Manage Approvals**.
 - To add a new workflow from scratch, click the green **A New Workflow** button.
2. The workflow is broken up into phases. Click the **Phase Name** field, then type a name for the first phase. Then click the **Add Approver** button.

3. Select the name of your first approver from the drop-down menu. Then choose whether you want this person to be an **Approver** or **FYI Only** by clicking the corresponding button. FYI Only are people who are a part of the workflow but are not required to approve the file; they'll be able to view details of the agenda item, including attachments, for informational purposes. Click the green **Add** button.

4. The approver's name and avatar now display on the phase. You can add multiple approvers to a single phase, or just use one approver on each phase to create a specific sequence for the workflow to follow. Repeat step 3 to add more approvers to this phase. When you're done with the first phase, click the green **checkmark** in the upper right-hand corner of the phase box.



5. To add another phase, click the **plus sign (+)** underneath an existing phase.



6. Once a phase is added, you can use the **pencil**



to edit it, the **arrows**

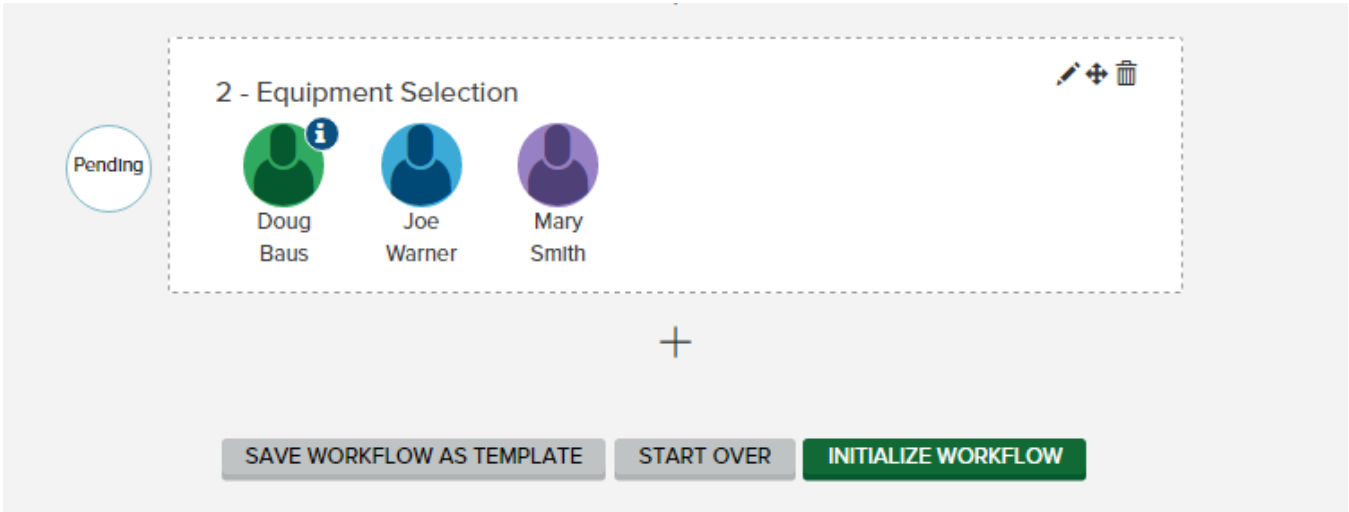


to drag and drop into a new order, and the **trash can**



to delete.

7. When you've added all the phases you need, you can choose to save this workflow as a template for future use. To save the workflow for future use, click the **Save Workflow as Template** button. If you want to scrap your work and start again, click the gray **Start Over** button. No changes will be saved if you choose to start over.



7a. You will be then be able to click the **Template Name** field and give your workflow a name. Click **Save Template**.

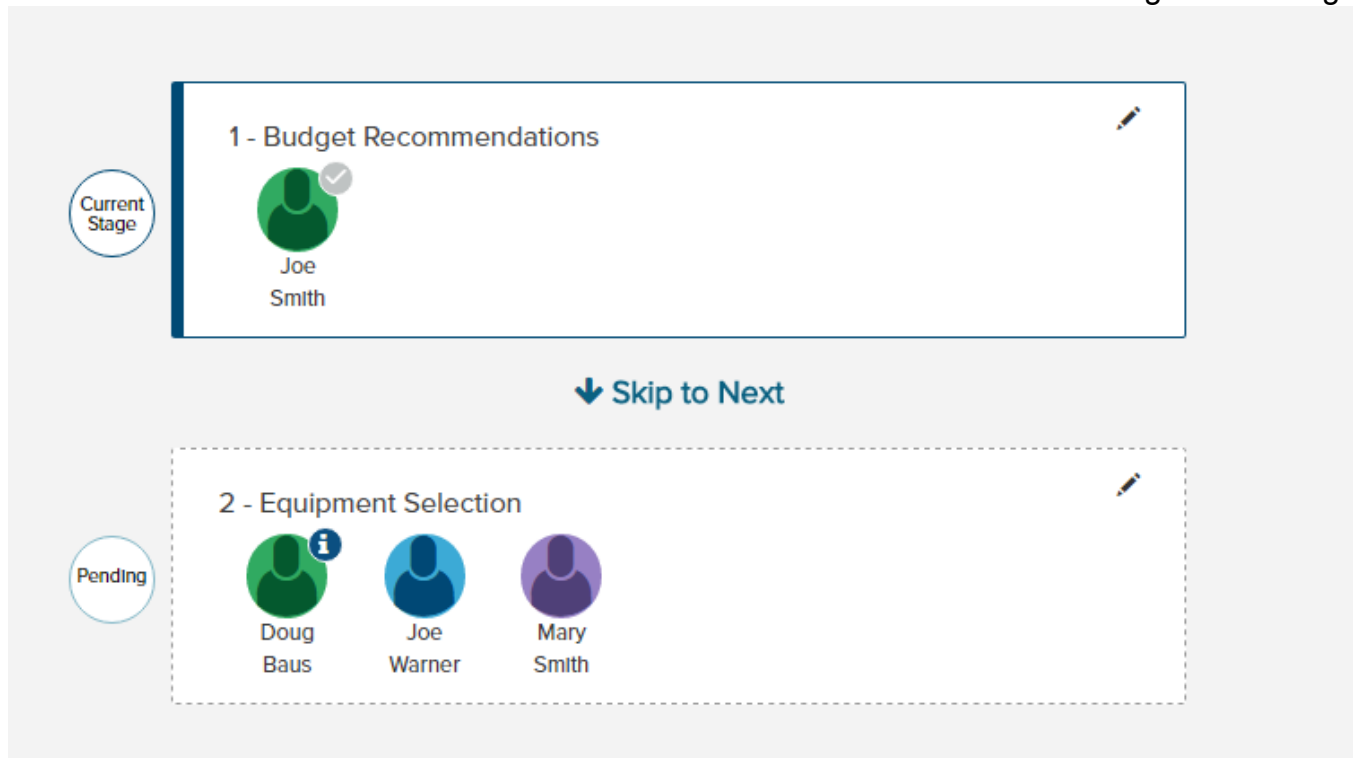
Template Name

Name your template

SAVE TEMPLATE

Cancel

8. To initialize the workflow, click the green **Initialize Workflow** button.



The [approval workflow is now in review](#). Emails will be automatically sent to the approvers informing them that an agenda item requires their approval. Peak uses automated emails to alert the item's drafter and participants to various other workflow actions as well. [See specifics about Peak's automated workflow notification emails](#).

Note: Workflows can be [deleted only by Peak Admins](#) via the **Admin > Agenda Items > Manage Approvals**. [Admins can also assign workflows an individual or departmental owner](#), which will limit who has access to them. If you create a workflow here, for example, that you do not want anyone else to be able to use, contact your Peak Admin to assign you as the owner of the workflow; it will then display in the menu only for you.

[<<< Previous: Viewing the Dashboard](#)

[>>> Next: Approval Workflow Features](#)

[Return to Peak help topics](#)

Peak Approval Workflow Automatic Email Notifications

Approval workflows use automated emails, which are sent to participating individuals after actions are taken in the workflow. The following table indicates who receives an email after which actions and gives the name of the corresponding email template. You can read the text of the emails below the table. [See here for automatic emails related to comments in the activity stream.](#)

Action	Who Receives the Email	Email Template Used (see below)
Workflow is initiated	All approvers and FYlers assigned to the first phase of the workflow	Approval Request FYI
Approver is removed	Any approver removed from the current active phase	Approver Removed
Workflow phase has been completed	All approvers and FYlers assigned to the following phase of the workflow	Approval Request FYI
Workflow has been canceled	All approvers in the current and previous phases	Workflow Canceled
Approval has been delegated to another user	Drafter of the item and the delegatee	Approval Request Delegated
Workflow phase has been skipped	All approvers in the skipped phase	Phase Skipped
Workflow is complete	Drafter of the item	Workflow Approved

Email Templates

Variables are indicated by text in brackets [].

Approval Request:

Subject: You've been asked to approve an agenda item

Hello [Approver]

[Agenda Item Type] [Agenda Item ID] has been submitted by [Drafter] for your review and approval. The target meeting for this item is for the [Meeting Body] meeting on [Agenda Date]. The description is as follows:

[Agenda Item Title]

Please review this item at [URL for this Approver and Item].

This email is an automatic email notice from your Peak Agenda Workflow System. Please do not 'Reply' to this email, but use the link above. Thank you.

FYI

Subject: FYI - An item has been submitted

Hello [FYler]

This email notice is For Informational Purposes Only.

[Agenda Item Type] [Agenda Item ID] has been submitted for approval. The description is as follows:

[Agenda Item Title]

To view the item please go to [URL for this FYler and Item]

This email is an automatic email notice from your Peak Agenda Workflow System. Please do not 'Reply' to this email, but use the link above. Thank you.

Approval Request Delegated

Subject: You've been asked to approve an agenda item

Hello [Approver]

[Agenda Item Type] [Agenda Item ID] has been delegated to you by [Approver who delegated] for your review and approval. The target meeting for this item is for the [Meeting Body] meeting on [Agenda Date]. The description is as follows:

[Agenda Item Title]

Please review this item at [URL for this Approver and Item].

This email is an automatic email notice from your Peak Agenda Workflow System. Please do not 'Reply' to this email, but use the link above. Thank you.

Workflow Canceled

Subject: Your approval is no longer required

Hello [Approver]

[Agenda Item Type] [Agenda Item ID] approval review has been cancelled. Your review of this item is no longer required.

This email is an automatic email notice from your Peak Agenda Workflow System. Please do not 'Reply' to this email. Thank you.

Workflow Approved

Subject: Your item has been approved

Hello [Drafter]

The proposed [Agenda Item Type] [Agenda Item ID], which you submitted to one or more persons for review and/or approval has been approved for the [Agenda Date] [Meeting Body] meeting.

This email is an automatic email notice from your Peak Agenda Workflow System. Please do not 'Reply' to this email. Thank you.

Phase Skipped

Subject: Your approval is no longer required

Hello [Approver]

Your review of [Agenda Item Type] [Agenda Item ID] is no longer required.

This email is an automatic email notice from your Peak Agenda Workflow System. Please do not 'Reply' to this email. Thank you.

Approver Removed

Subject: Your approval is no longer required

Hello [Approver]

Your review of [Agenda Item Type] [Agenda Item ID] is no longer required.

This email is an automatic email notice from your Peak Agenda Workflow System. Please do not 'Reply' to this email. Thank you.

[Return to Peak help topics](#)

Peak Agenda Management: Getting Started

Here you can learn the basics of logging in and navigating the application.

	What is Peak?
Getting Started	Logging in to Peak
	What if I don't get my welcome email?
Navigation	Navigating Peak Agenda Management
	Viewing the Dashboard

Logging in to Peak

When a Granicus Platform Administrator creates a user account for you, Peak will send you a welcome email containing the following:

- Your jurisdiction's URL
- Your username
- A link to set your initial password
- Instructions on how to log in to Peak once you've set a password
- The user role you've been assigned in Peak and an explanation of what that role can do
- Links to the Granicus Help Center and online trainings

To create your password, click the **Set My Password** link in the body of the email:



Welcome To Peak Agenda Management!

Your job just got easier. Peak gives you the tools to create agenda items, build agendas, get approval on each, and generate agenda packets and other documents.

1. Here's your account information:

Domain: elearning.granicus.com

Username: **Elizabeth.Warriner**

Set your password

a. Click **SET MY PASSWORD** below; you'll be taken to the My Account section of the Granicus Platform.

b. Enter a new password in the **password** and **confirm** fields.

c. Click **Save**.

A rectangular button with a blue gradient and a red border, containing the text "SET MY PASSWORD" in white, bold, uppercase letters.

SET MY PASSWORD

2. Sign into Peak

a. Navigate to elearning.granicus.com.

b. Enter your **username** and **password** in the corresponding fields.

c. Click **Sign In**.

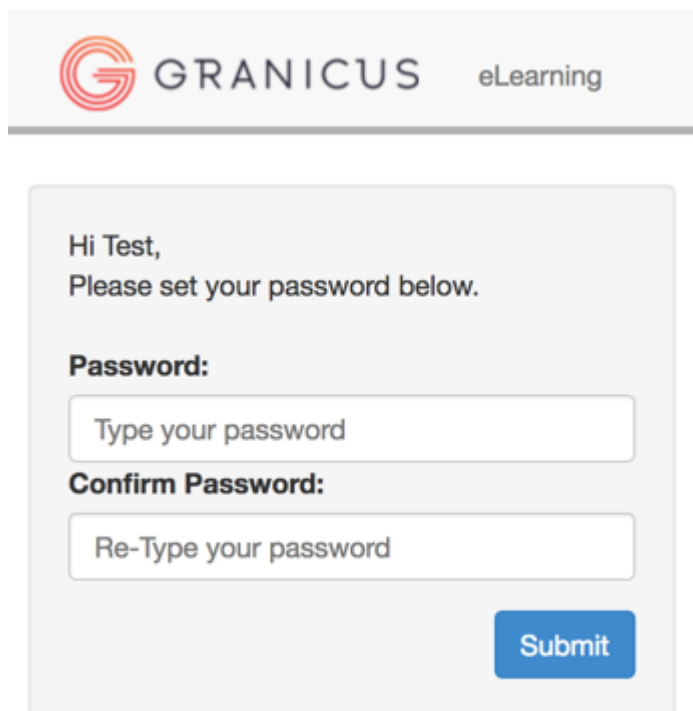
Note: You can always return to Peak from anywhere in the Granicus Platform by clicking the Apps menu in the upper right corner of the screen and selecting Peak.

3. More Information

Your role in Peak is: **Drafter**

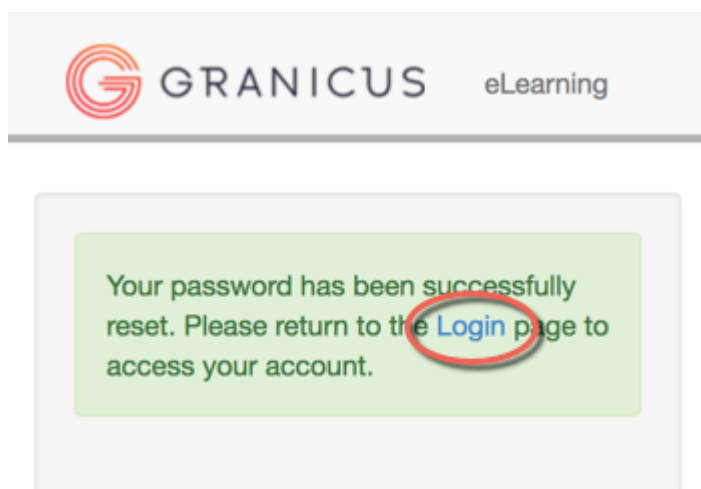
Drafter: This role has the ability to create and manage everything related to agenda items and agenda item workflow. A Drafter can also view agendas, along

You'll land on a page with two fields illustrated below. Enter the password you'd like to use in the **Password** field, then reenter the same password in the **Confirm Password** field. Your password will be case-sensitive. Click **Submit**.



The screenshot shows the Granicus eLearning logo at the top. Below it, a message reads: "Hi Test, Please set your password below." There are two input fields: "Password:" with the placeholder "Type your password" and "Confirm Password:" with the placeholder "Re-Type your password". A blue "Submit" button is located at the bottom right of the form.

If your passwords match, you'll be given the below message. Click the **Login** link.



The screenshot shows the Granicus eLearning logo at the top. Below it, a green message box contains the text: "Your password has been successfully reset. Please return to the [Login](#) page to access your account." The word "Login" is a blue hyperlink and is circled in red.

Enter the username as given in your welcome email, and the password you set on the previous page. The username will be your first and last names separated by a period. For example, **Jane.Smith**. Your username is not case-sensitive. Click **Sign In**.



Username:

Password:

[Forgot Password?](#)

[Sign In](#)

— or —

Use ActiveDirectory to [Sign In](#)

You'll land on your [Peak Dashboard](#).

► **What if I don't get my welcome email? How can I create a password and log in?**

[<<< Previous: What is Peak?](#)

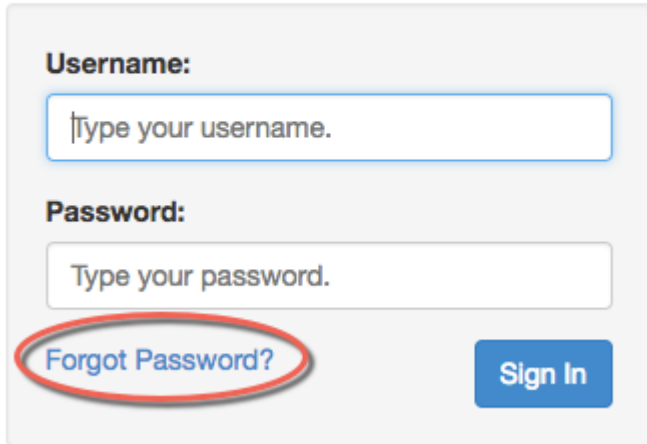
[>>> Next: Navigating Peak Agenda Management](#)

[Return to Peak help topics](#)

What if I don't get my Peak welcome email?

When your administrator gives you a username, the Peak system sends out an email with your username and a link to create your password. We recommend you check your junk or spam folder to make sure the email didn't end up there. If you can't find it, you can log in to Peak using the following workaround:

1. Navigate to [yourjurisdiction].granicus.com. For example, the city of Santa Barbara's URL would be santabarbara.granicus.com.
2. On the login page, there will be fields to enter your username and password. Below the **Password** field is a **Forgot Password** link. Click it.

The image shows a login form with two input fields: "Username:" and "Password:". Below the "Password:" field is a link that says "Forgot Password?". This link is circled in red. To the right of the "Forgot Password?" link is a blue button with the text "Sign In".

3. You'll land on a page with a field to enter your username. Your username is firstname.lastname. For example, Albert Einstein's username would be [albert.einstein](#). Enter your username in the field and click **Submit**.

Hi,
Please enter your username below and we
will email you a link to reset your password.

Username:

Submit

4. If you successfully submitted your username, you'll get the below message. Check your email inbox for an email from **noreply at granicus dot com**. The email will be titled "Granicus - MediaManager Password Recovery." Keep in mind that this message will go to the email address entered in the system, so if you don't get one, check with your Peak administrator to make sure the correct email address is on file.

Recovery email sent. Please check your email and follow the instructions to reset your account password. If you do not receive an email then please check your spam filter settings and/or verify that you entered the correct username.

5. Click the link in the body of the email.



noreply@granicus.com

4:10 PM (3 minutes ago) ☆

to me ▾

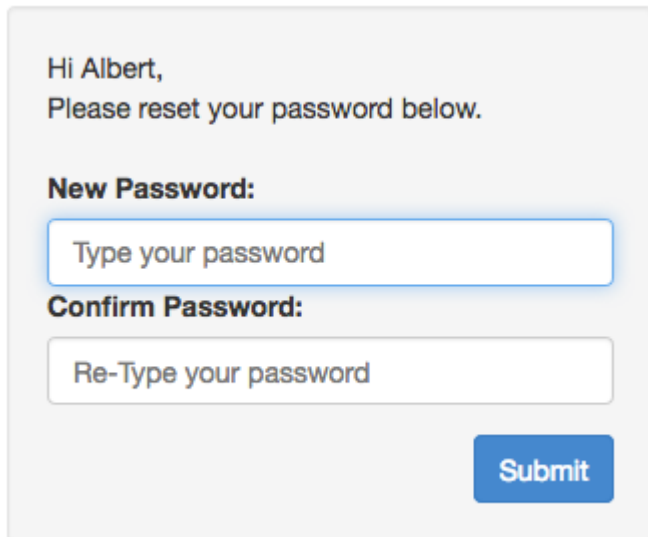
Hello Albert,

Please follow this [Link](#) to reset your password.

If you did not request a password reset then please contact your site administrator.

Thank you.

- You'll be taken to a page with fields to type in a password. Even if you did not have a password before, you can set on here. Remember that passwords are case-sensitive. Type the password in the **New Password** and **Confirm Password** fields and click **Submit**.



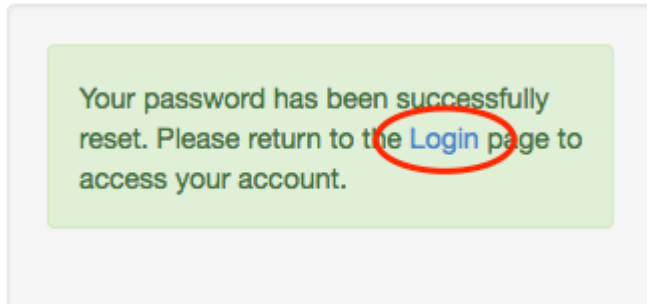
Hi Albert,
Please reset your password below.

New Password:

Confirm Password:

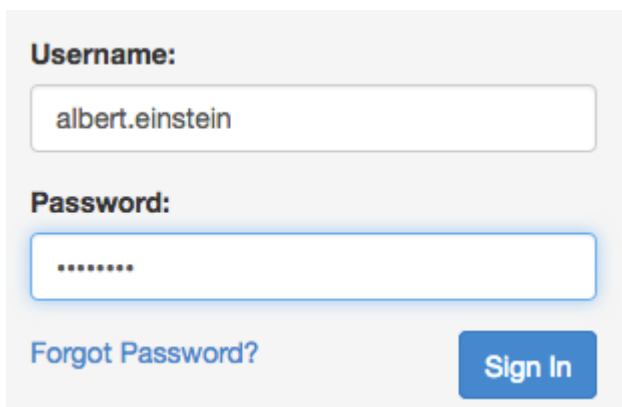
Submit

- In the success message, click the **Login** link to return to the login page.



Your password has been successfully reset. Please return to the [Login](#) page to access your account.

- You'll land back on the original login page. Enter your username and the password you just set in the fields, and click **Sign In**. You'll land on your [Peak Dashboard](#).



Username:

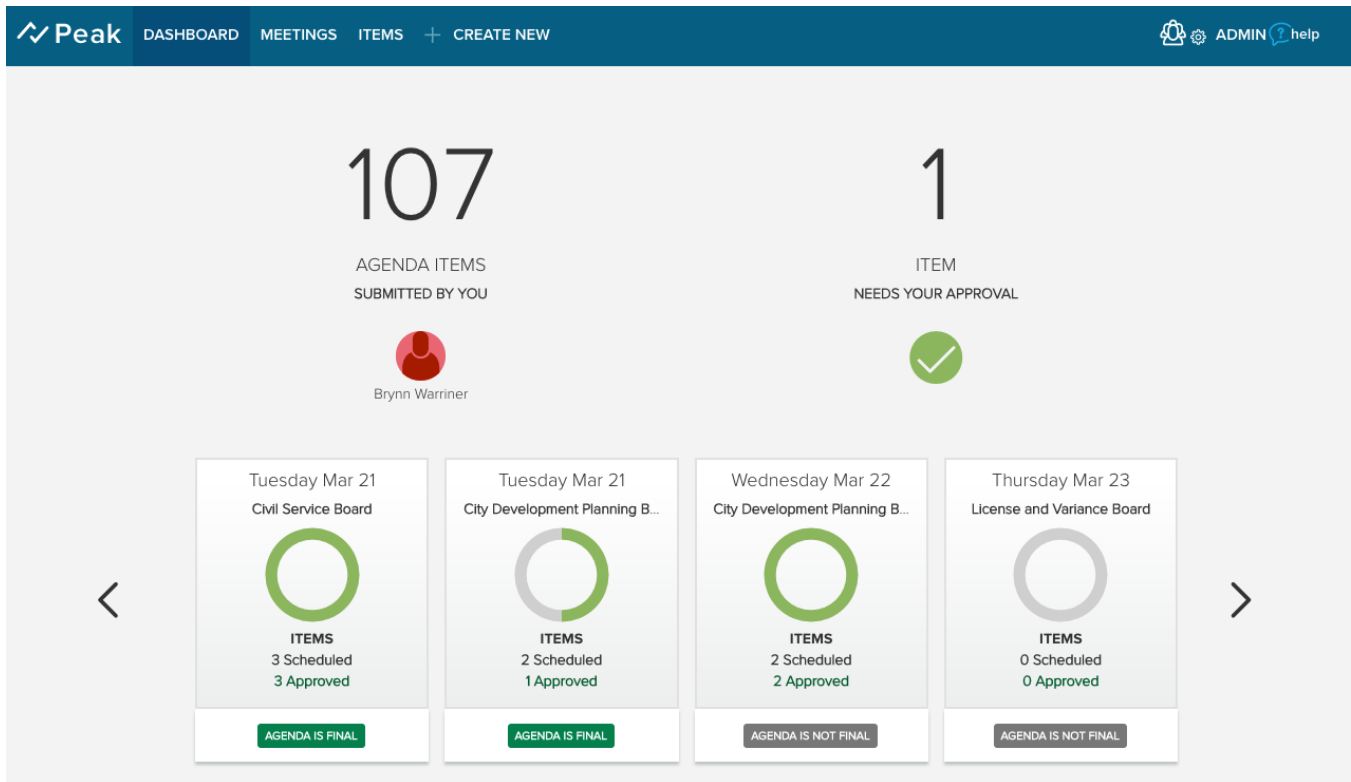
Password:

[Forgot Password?](#) **Sign In**

[Return to Peak help topics](#)

Navigating Peak Agenda Management

To access the Peak Agenda Management application, log in to your MediaManager site and click **Apps** in the upper right-hand corner. Select **Peak Agenda** from the drop-down menu. The [dashboard](#) is user-specific and will display as below:

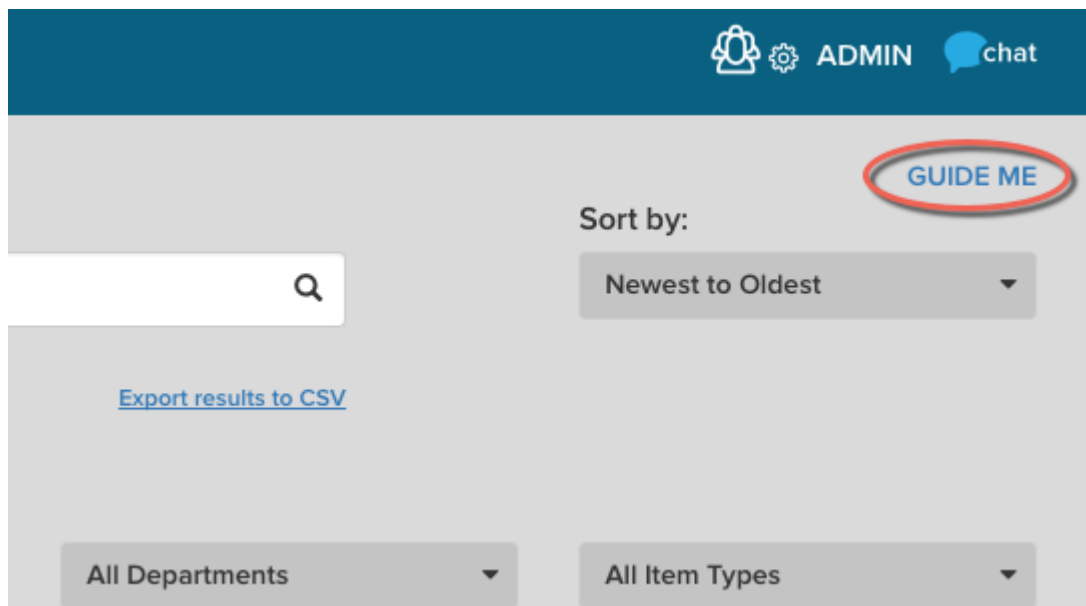


The navigation bar at the top of the page allows you to quickly access different areas of the application. The following table describes the tabs on the navigation bar and includes links to the help topics associated with each tab:

Area	Description
Dashboard	The dashboard will provide access to important data in the application. You can jump to recently submitted items, see the number of items needing your approval, and navigate to upcoming meetings .

Meetings	The Meetings page is where you will schedule , manage, and view all information related to meetings and agendas.
Items	The Items page is where you will have access to view and manage all the agenda items in the system.
Create New: Meeting	This is a shortcut in the navigation bar that takes you to the Create New Meeting page.
Create New: Agenda Item	This is a shortcut in the navigation bar that takes you to the Create New Agenda Item page.
Admin	The Admin page is where all configuration and data setup is performed for the application. You'll only see this if you have Peak Admin permissions .
Chat	Provides access to Peak's Live Chat feature if you need support.

Throughout Peak, you'll find links to the **Guide Me** in-app help feature in the upper right-hand corner of pages. This guide gives a concise, step-by-step tutorial on key features and functionality of each page without requiring you to leave Peak. Activate the guide by clicking the **Guide Me** link anywhere you see it in Peak.



Note also the **chat** button in the upper right-hand corner. Click to access our Live Chat feature, where you can ask a question if you need assistance with Peak. This chat button is accessible from any page in Peak. If no one is available to chat, the button will instead display as **help** and will bring you here to the Help Center.

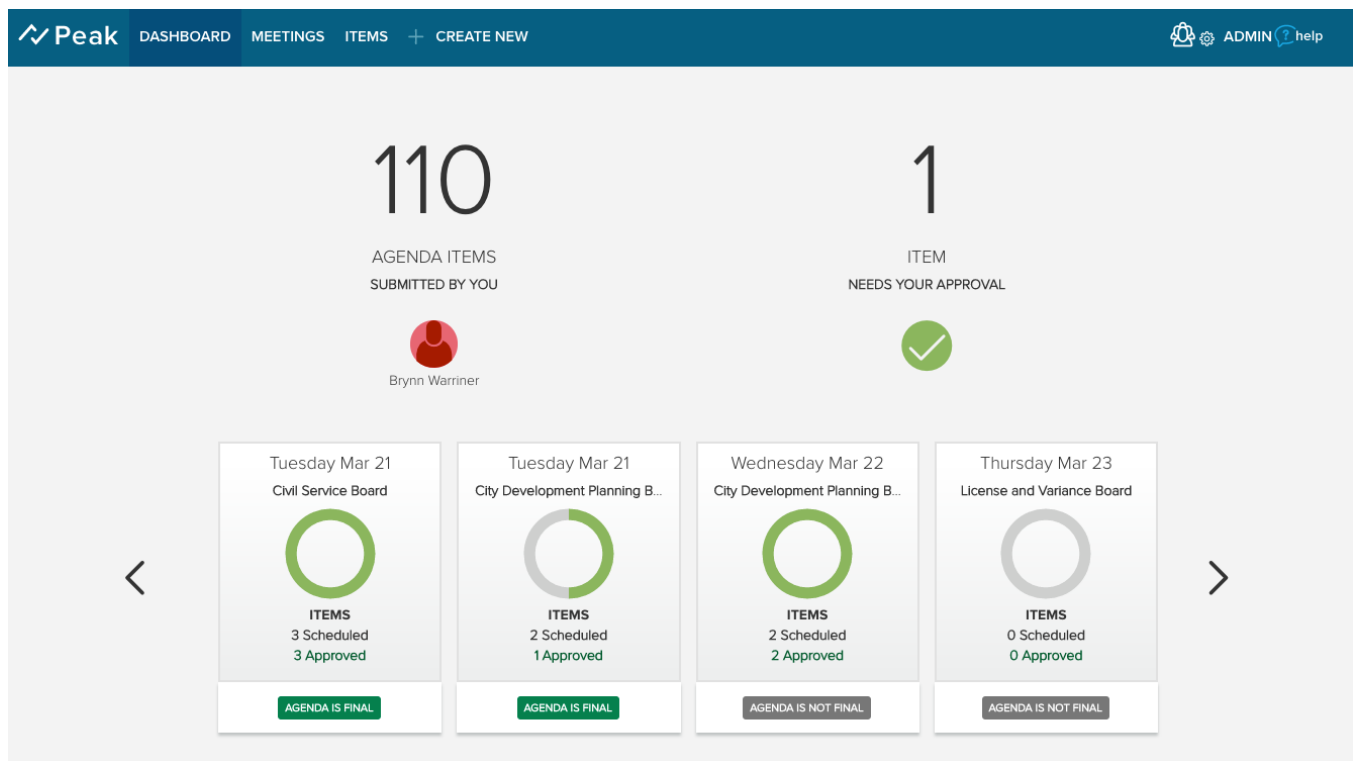
[<<< Previous: Logging in to Peak](#)

[>>> Next: Creating Departments](#)

[Return to Peak help topics](#)

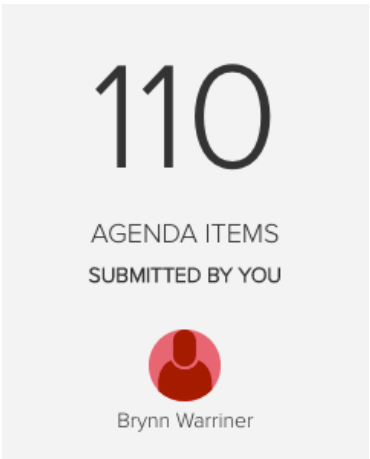
Viewing the Dashboard in Peak

The Peak dashboard will provide quick access to important data in the application. You can access your agenda items in draft, review, or final status as well those items needing your approval. You can also easily navigate to upcoming meetings. The Dashboard is user-specific and is the first page you see upon signing in to Peak. You can also get to it easily at any point by clicking **Dashboard** on the left side of the navigation bar.



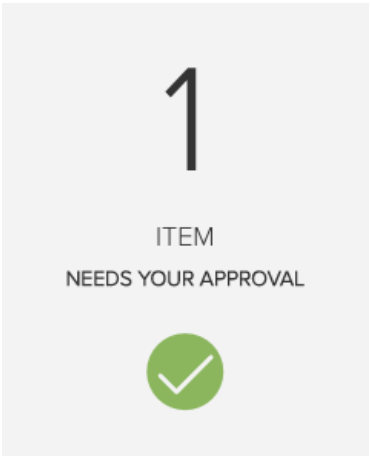
The dashboard page displays the following information:

Feature	Description
Submitted by You	This number displays the total number of items you have submitted that are in draft, review, or approved status. Click to access your agenda items.



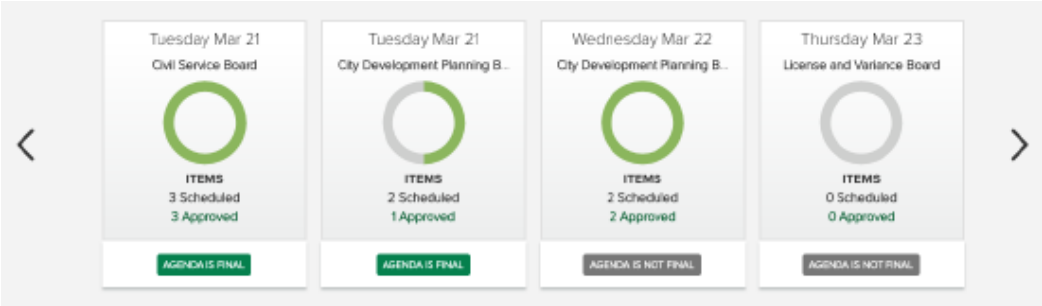
This displays the total number of agenda items awaiting your approval. Click to access the list of agenda items.

Needs Your
Approval



Meetings

This is a list of meetings arranged chronologically for the previous and upcoming six months (i.e., +/- six months from today's date). The status at the bottom of each meeting card shows whether the agenda is final. You can also see how many items have been scheduled for each meeting, and how many of those items have been approved. Approval progress is reflected in the green circles—a complete circle means all scheduled items have been approved. Click the arrows to navigate forward and back through the meetings, and click on any of the upcoming meetings in this list to be taken directly to that meeting's agenda. Note: Drafters can only click through to agendas that have a **final** status.



[<<< Previous: Editing Agenda Items](#)

[>>> Next: Setting Up Approval Workflows](#)

[Return to Peak Help Topics](#)

What is Peak?

Peak is a browser-based agenda management application that does not require a lot of training or configuration. With Peak you'll be able to digitally [create and manage agenda items](#), [create workflows](#) for agenda item approval, [schedule meetings](#), and create and distribute paperless [agenda packets](#).

To use Peak, you'll need one of the following browsers: Chrome, Firefox, Safari, or Internet Explorer. To see more technical requirements, including supported screen resolutions, see the [technical solutions guide](#) for Peak.

[>>> Next: Logging in to Peak](#)

[Return to Peak help topics](#)

Peak Agenda Management: Meetings

In the meetings section, you'll learn how to create and edit meetings and customize, download, and publish meeting agendas.

[Navigating the Meetings Page](#)

[Creating Meetings](#)

Meetings

[Advanced Meeting Options](#)

[Editing Meeting Details](#)

[Editing Agenda Details](#)

[Customizing Agenda Numbering](#)

Agendas

[Adding an Agenda Item on the Fly](#)

[Downloading an Agenda](#)

[Publishing an Agenda](#)

Adding an Agenda Item on the Fly

When you are editing agenda details in Peak, you have the option to add an agenda item on the fly rather than going through the standard process to [create an agenda item](#).

1. To add an agenda item to the agenda your working with, click the **Add Item** button on the left-hand side of the [Edit Agenda Details](#) page.



MARCH 23, 2018

Small Business Council Meeting Agenda

General Meeting

The agenda is currently editable. To lock the agenda, click the Editing Agenda button on the toolbar to the left. You can add new agenda items and sections from the toolbar as well.

☒ Manual Agenda Numbering is On

Meeting Status: **DRAFT**

EXPAND ALL SECTIONS

1	▶ Roll Call	✚ 🗑
2	▶ Pledge of Allegiance	✚ 🗑
3	▶ Proclamations	✚ 🗑
4	▶ Recognitions	✚ 🗑
5	▶ Adoption of Agenda	✚ 🗑
6	▶ Public Comment	✚ 🗑
7	▶ Consent Agenda	✚ 🗑
8	▶ Presentations	✚ 🗑

2. The **Add an Agenda Item** modal will appear, as shown below. Select **Add Existing Items** to choose from existing agenda items, or **Create New** to create a new item from scratch.

ADD AN AGENDA ITEM

[ADD EXISTING ITEMS](#)
[CREATE NEW](#)

Sort by: **NEWEST TO OLDEST** Show: **ALL**

IN DRAFT

2016-107-Granicus
Small Business Council Initiatives

V2

☐ Select Item

0 ATTACHMENTS

Cover Page Included

IN DRAFT

2016-197-Granicus
Clerk to the Board Day 2017

V2

☐ Select Item

0 ATTACHMENTS

Cover Page Included

3. To add items from the list of available agenda items in the system, use the **Search Items** field to look for specific names, keywords, or agenda item IDs. You can also use the **Sort by** drop-down menu and select **Newest to Oldest**, **Oldest to Newest**, or **Item ID**; or filter the results by using the **Show** drop-down menu, which is populated by all the different **item types** in your system.

Sort by: **NEWEST TO OLDEST** Show: **HONORARY RESOLUTION**

4. Click the **checkbox** on the right-hand side of the item card for all the items you wish to add. Once you have checked the box, the **Select Section** drop-down menu appears below the checkbox. The menu is populated with the sections from the agenda you're working with. Add as many items at once as you need, selecting a section for each.

Peak Agenda Management

DASHBOARD MEETINGS ITEMS + CREATE NEW ADMIN

MARCH 23, 2018

Small Business Council Meeting Agenda

General Meeting

ADD AN AGENDA ITEM

The agenda is currently editable. To lock the agenda, click the Editing Agenda button on the toolbar.

ADD EXISTING ITEMS CREATE NEW You can add new agenda items and sections from the toolbar as well.

small busine Sort by: NEWEST TO OLDEST Show: ALL

EXPAND ALL SECTIONS

Add Section

1 Roll Call

2016-107-Granicus V3 Select Item

IN REVIEW Small Business Council Initiatives

1 ATTACHMENTS Cover Page Included

2016 Budget Recommendations 49766.pdf

2016-107-Granicus

IN DRAFT Small Business Council Initiatives

0 ATTACHMENTS

Select Section

Select a Section

- Roll Call
- Pledge of Allegiance
- Proclamations
- Recognitions
- Adoption of Agenda
- Public Comment

4a. You can add the item to multiple sections by choosing additional options from the drop-down menu. To remove a section, click the **x** next to its name.

Peak Agenda Management

DASHBOARD MEETINGS ITEMS + CREATE NEW ADMIN

MARCH 23, 2018

Small Business Council Meeting Agenda

General Meeting

ADD AN AGENDA ITEM

The agenda is currently editable. To lock the agenda, click the Editing Agenda button on the toolbar.

ADD EXISTING ITEMS CREATE NEW You can add new agenda items and sections from the toolbar as well.

small busine Sort by: NEWEST TO OLDEST Show: ALL

EXPAND ALL SECTIONS

Add Section

1 Roll Call

2016-107-Granicus V3 Select Item

IN REVIEW Small Business Council Initiatives

1 ATTACHMENTS Cover Page Included

2016 Budget Recommendations 49766.pdf

2016-107-Granicus

IN DRAFT Small Business Council Initiatives

0 ATTACHMENTS

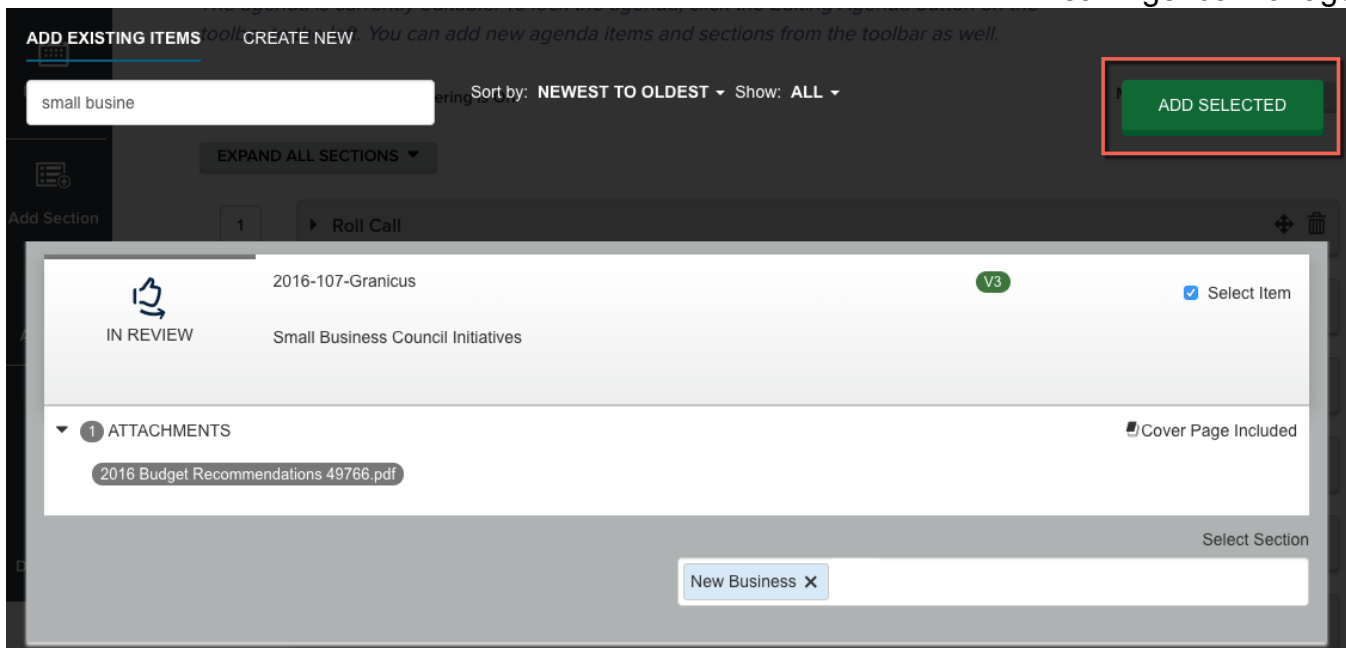
Select Section

Select a Section

- Roll Call
- Pledge of Allegiance
- Proclamations
- Recognitions
- Adoption of Agenda
- Public Comment

New Business x Public Comment x

5. Click **Add Selected** button to add the item to the agenda section or sections you've chosen.



6. The agenda item(s) now appear on the agenda. You can now [edit, rearrange, and remove items](#).

To add an item from scratch, go to step 2 and choose **Create New**. The process from here is the same as the standard process to [create an agenda item](#), except that the **Meeting Body** and **Meeting Date** fields will be filled with the information from the agenda you're working with:

ADD AN AGENDA ITEM

To lock the agenda, click the Editing Agenda button on the toolbar to the left. You can add new agenda items and sections from the toolbar as well.

ADD EXISTING ITEMS **CREATE NEW**

Meeting Details ☒ Manual Agenda Numbering is On Meeting Status: **DRAFT**

ITEM TITLE *

SUGGESTED ACTION

ITEM TYPE * **ITEM ID**

Select an Item Type Granicus-XXXX-2018

SUBMITTING DEPARTMENT **DRAFTER**

Select a Department Granicus Support

MEETING BODY **MEETING DATE**

Small Business Council March 23, 2018 06:00 PM

AGENDA SECTION *

Select a Section

CANCEL **SAVE ITEM**

Choose the appropriate agenda section or sections from the **Agenda Section** drop-down menu. Click the **Save Item** button, and your item displays on the agenda. To enter information into any [custom fields](#), add attachments, and create an approval workflow, click the **pencil** on the item card to [edit the agenda item](#) once you have added it.

Note: The item is added to the agenda and will be set automatically to Approved. This provides a quick and easy way to add an item to an agenda and bypass the workflow process. If you need a workflow on the item, use the **Set Status to In Draft** button, and [add a workflow via the item details page](#).

[<<< Previous: Customizing Agenda Numbering](#)

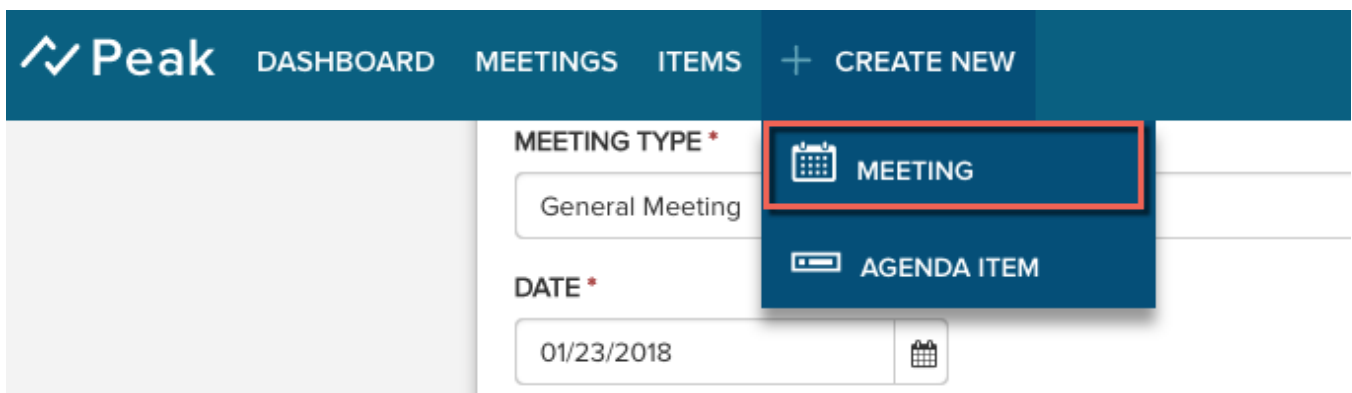
[>>> Next: Downloading an Agenda](#)

[Return to Peak help topics](#)

Creating a New Meeting in Peak

The Create New Meeting page allows you to schedule either one-time or recurring meetings. This functionality is available to users with Agenda Coordinator or Peak Admin roles.

1. To create a meeting, click **Create New** on the Peak navigation bar, then choose **Meeting**. You can also click **Add New Meeting** on the main [Meetings page](#).



The screenshot shows the Peak application interface. The top navigation bar includes 'Peak', 'DASHBOARD', 'MEETINGS', 'ITEMS', and a '+ CREATE NEW' button. A dropdown menu is open from the '+ CREATE NEW' button, showing two options: 'MEETING' (with a calendar icon) and 'AGENDA ITEM' (with a document icon). The 'MEETING' option is highlighted with a red rectangular box. Below the navigation bar, the 'MEETING TYPE' field is visible, with a red asterisk indicating it is a required field. The dropdown for this field shows 'General Meeting'. Below that, the 'DATE' field is also marked with a red asterisk and shows the date '01/23/2018' with a calendar icon to its right.

The following figure illustrates the Create New Meeting page for a one-time meeting. Red asterisks indicate required fields.

ONE TIME MEETING

RECURRING MEETING

MEETING BODY *

MEETING LOCATION

MEETING TYPE *

DATE *

01/23/2018

START TIME *

10:30 AM

END TIME *

11:30 AM

MEETING LENGTH

1 hour

ITEM SUBMISSION DEADLINE

CUTOFF TIME

DESCRIPTION

ADVANCED SETTINGS (Please first select a Meeting Body and Meeting Type)

2. Choose whether the meeting will be recurring or a single occurrence by clicking **One Time Meeting** or **Recurring Meeting**. By default, the page is set for a one-time meeting.
- 3a. Enter the details for your meeting. The table below describes the options for a one-time meeting:

Feature	Action

Meeting Body	Click the drop-down menu and select the body associated with this meeting. You can also begin typing the body name in the field to limit the menu options.
Meeting Location	Click the field, then add a meeting location. If the selected meeting body has a default meeting location set up, the field will automatically populate with this information.
Meeting Type	Select a meeting type from the drop-down menu. You can also begin typing in the field to limit the menu options. If the selected meeting body has a default meeting type set up, Peak will automatically select the meeting type.
Date	Click the Calendar icon  and select a date from the calendar. You can also type a date directly in the Date field with the format MM/DD/YYYY.
Time	Click the Clock icon  and select a time from the drop-down menus for meeting start and end times. The end time defaults to one hour later than the start time. You can also type a time in the field with the format H:MM AM/PM or HH:MM AM/PM. Meeting duration can be between 1 and 16 hours. If the selected meeting body has a default time set up, this information will automatically populate the Time fields.
Meeting Length	This automatically calculates once you fill in the start and end times.
Item Submission Deadline	Setting an item submission deadline restricts users with the Drafter role to assign agenda items to this meeting only up until its deadline. After the deadline has passed, the meeting date is no longer included in the drop-down menu on the Item Details page, at which point only Agenda Coordinators or Peak Admins will be able to add an agenda item to the agenda. Click the field and select a date from the calendar. This field defaults to blank if no date is selected.
Cutoff Time	Select the time at which agenda items can no longer be added to the agenda on the date specified in the Item Submission Deadline field. This field defaults to the nearest hour to the current time if no time is selected.
Description	Click the field, and then type a description of the meeting.

Note: There is no indicator on the calendar to differentiate between a meeting that is recurring and a single meeting. As the creator of the meeting, you might wish to place some text in the **Description** field to indicate whether this is a recurring meeting, e.g., "This is a city council meeting series scheduled every Monday from 5:30–6:30 pm from 11/1/2015 through 12/31/2016."

Advanced Settings

Advanced settings pertain to settings for events in the Granicus Platform (MediaManager) so that the applications can better talk to each other. You must have a meeting body and meeting type set for these settings to become available. [See here for more on the advanced setting options.](#)

3b. If you choose to create a recurring meeting, you will have additional options:

Feature

Action

Repeats

This option allows you to specify the pattern of recurrence for the meeting. Click the **Repeats** drop-down menu, then choose when the meeting will repeat: *Daily*, *Weekly*, *Monthly*, or *Yearly*.

If you selected a *Daily* meeting, click the **Every** field and type the number that indicates how often the meeting occurs. The meeting in the example below will take place every third day:

Daily

REPEATS *

Daily

EVERY *

3

days

Weekly

If you chose a *Weekly* meeting, click the **days of the week** buttons to choose when the meeting recurs. When the days of the week are blue, they are selected. Next, enter a number in the **Every** field to indicate how many weeks between meetings. The meeting in the example below will take place on Tuesdays and Fridays, every other week:

REPEATS *

Weekly

ON *

S M T W T F S

EVERY *

2 weeks

If you chose a *Monthly* meeting, click the weeks on which the meeting falls: 1st, 2nd, 3rd, 4th, or 5th week of the month. Then click the **Day** drop-down menu, and choose the day of the week the meeting will take place. In the **Every** field, choose how often the monthly meeting will occur. The meeting in the example below will take place on the 2nd and 4th Wednesday of every month:

Monthly

REPEATS *

Monthly

ON THE *

1st 2nd 3rd 4th 5th

DAY *

Wednesday

EVERY *

1 months

If you chose a *Yearly* meeting, click the **Every** field and specify how often the meeting will occur. The meeting in the example below repeats once a year on the first date specified in the **Recurrence Range** field:

Yearly

REPEATS *

Yearly

EVERY *

1 years

Click the **Calendar** icon

Recurrence Range



and select dates to create a range of dates for the meeting. In the example below, the meeting will repeat through the end of 2016:

RECURRENCE RANGE *

9/29/2015		-	12/31/2016	
-----------	---	---	------------	---

4. Click the green **Save** button to save your meeting details. The meeting now shows up on the Meetings page calendar.

[<<< Previous: Navigating the Meetings Page](#)

[>>> Next: Advanced Settings for Meetings](#)

[Return to Peak help topics](#)

Advanced Settings for Peak Meetings

To enable compatibility between a Peak meeting and its corresponding Granicus Platform (MediaManager) event, you can use the **Advanced Settings** button on the single and recurring Meeting Details form to open a variety of menus and options. This button becomes enabled after you select a meeting body and type, and clicking it will display the additional meeting/event options shown below.

ADVANCED SETTINGS ▲

MEDIA OPTIONS:

☐ Automatically start recording
 ☒ Broadcast event
 ☒ Record event
 ☒ Show on upcoming events

ENCODER

SalesDemo02Enc ▼

PLAYER TEMPLATE

No Template (Use Encoder Settings) ▼

ARCHIVE FOLDER

City Council ▼

ARCHIVE STATUS

Pending ▼

1. Select your media options using the four checkboxes:

Media Option

Description

Automatically Start Recording

Select this checkbox to automatically start the encoder to record the meeting at the specified date and time. This checkbox is deselected by default.

If you don't select this option, you must manually start the encoder at the start of the meeting.

Broadcast Event

Select this checkbox to stream the event live on your view page. This checkbox is selected by default.

If you don't select this option, the meeting will not display on the view page.

Record Event

Selecting this checkbox creates an archive (recording) of the event. This checkbox is selected by default.

Show on upcoming events

Selecting this checkbox causes the meeting to display in the list of upcoming events on your view page.

2. Select an **Encoder** from the drop-down menu to be used for the meeting. The encoder is the server responsible for recording, streaming, and transferring media files to Granicus's cloud services (data center).
3. Select the **Player Template** from the drop-down menu. The Player Template is a preset design for the Player Page that the public uses to view your live meeting and associated meeting documents.
4. Select the **Archive Folder** where recordings of the meetings will be stored in the Granicus Platform after the meeting ends.
5. Select the **Archive Status** (this will be the status after upload). The default selection is **Pending**. The table below shows descriptions of the available statuses:

Status	Description
Pending	Allows an internal user to view and edit the archive and decide when to make it public
Public	Allows citizens to view the archive after uploading
Not Public	Prohibits citizens from accessing the archive after uploading

See the [Granicus Platform \(MediaManager\) user guide for Events](#) for more details on these fields.

Existing event settings will be transferred to the corresponding Peak meeting, but events created via the Granicus Platform cannot be examined in Peak until you set a Peak meeting status, meeting body, and meeting type. Changes to the data in either application (Peak or the Granicus Platform) will update data in the other application for the same event/meeting.

Note: Views Available and Views Assigned are not currently supported in Peak. Please see the corresponding event in the Granicus Platform to see which View Pages are associated to the Peak meetings. You'll need to do this to see where your agenda reports and packets go when you publish them to View Pages from Peak.

[<<< Previous: Creating a New Meeting](#)

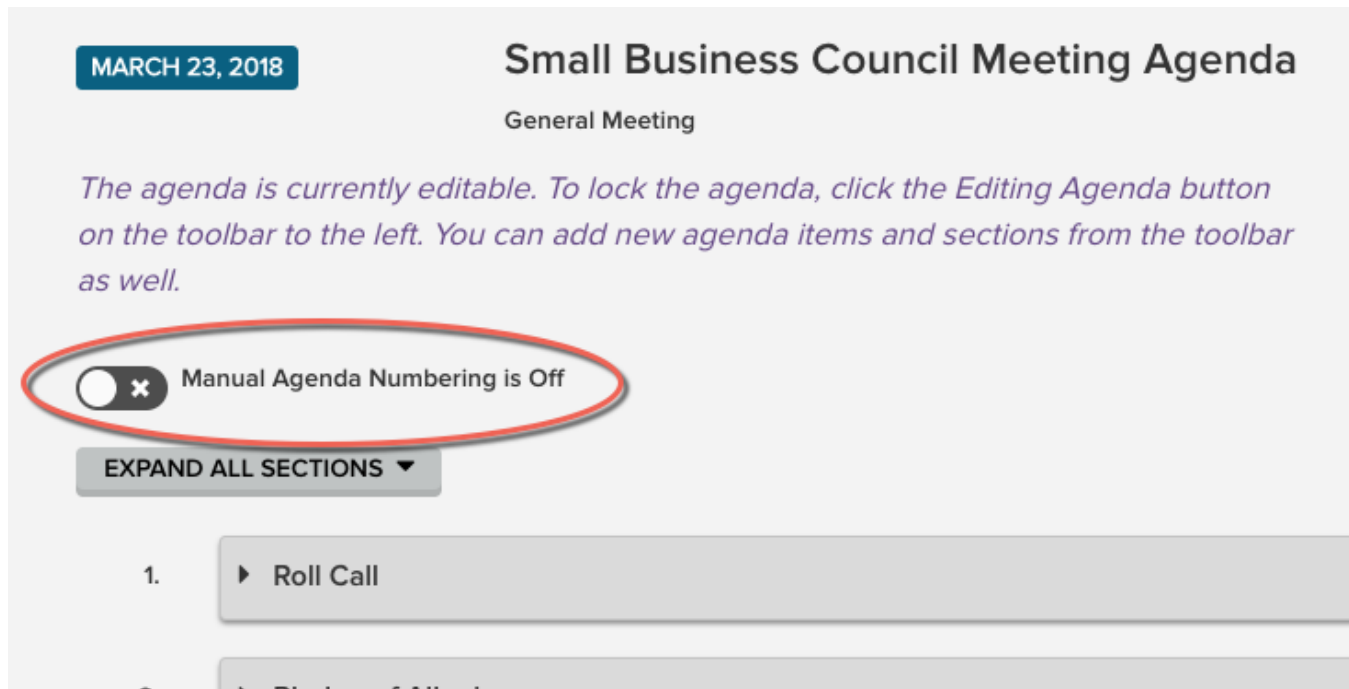
[>>> Next: Editing Meeting Details](#)

[Return to Peak help topics](#)

Customizing Agenda Numbering in Peak

Peak enables you to customize the numbering on your agenda sections and items. This feature allows for flexibility of numbering when the available default numbering schemes do not meet your needs or you need more variance of number format within a single agenda. To work with agenda numbering, navigate to the agenda you want to change via the meetings page or by clicking View Agenda on an associated agenda item.

1. To customize the section numbering of an agenda, click the **Manual Agenda Numbering** toggle switch to **On**. When the toggle is off, the standard numbering scheme associated with the meeting type is used.



2. When manual numbering is turned on, the section numbers display in fields to the left of each item. Click in the field, and type the desired number or combination of numbers and letters. You can use up to fifteen numerals, letters, spaces, and special characters in the fields.

☒ Manual Agenda Numbering is On

Meeting Status: **DRAFT**

EXPAND ALL SECTIONS

1

▶ Roll Call

2

▶ Pledge of Allegiance

3

▶ Proclamations

3. You can add or edit agenda item numbers in the same way.

9

▶ Public Hearings

10

▼ New Business

10a

2016-107-Granicus

Small Business Council Initiatives

IN DRAFT

V2

0 ATTACHMENTS

Cover Page Included

4. When you're finished making changes to both the section and item numbering, click the green **Save** button at the bottom right to apply the changes. If you attempt to navigate away from the page without saving, you will see a warning pop-up.

7

▼ Consent Agenda

7a

2016-86-Granicus

Agreement with St. Jude Hospital to Accept a Restricted Project Grant to Prevent and Redu

IN DRAFT

V2

▶ 2 ATTACHMENTS

Cover Page Included

You have unsaved changes

CANCEL

SAVE

Peak Agenda Management

The custom values you enter will publish in agenda reports and packets, as well as on published agendas on the platform, iLegislate, and view pages.

You can also add agenda item numbers to the cover page report. Contact [Granicus Customer Care](#) to request samples of the available layouts if you'd like this information added to your cover pages.

Note: When custom numbering is turned on, Peak does not automatically renumber sections when you drag and drop to reorder them.

[<<< Previous: Editing Agenda Details](#)

[>>> Next: Adding an Agenda Item on the Fly](#)

[Return to Peak help topics](#)

Downloading an Agenda in Peak

When you are editing agenda details in Peak, you have the option to download either the agenda alone or an agenda packet. You'll be able to choose between Word and PDF formats for your download.

1. To download the agenda you're working with, click the **Download** button on the left-hand side of the [Edit Agenda Details](#) page.



FEBRUARY 26, 2018 **City Council Meeting Agenda**
General Meeting

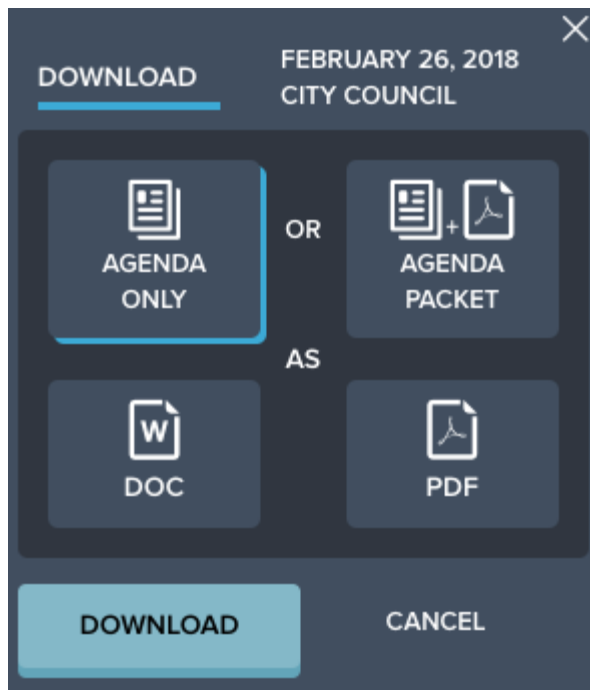
The agenda is currently editable. To lock the agenda, click the Editing Agenda button on the toolbar to the left. You can add new agenda items and sections from the toolbar as well.

☒ Manual Agenda Numbering is Off Meeting Status: **DRAFT**

EXPAND ALL SECTIONS

1.	▶ Roll Call	
2.	▶ Pledge of Allegiance	
3.	▶ Proclamations	1 AGENDA ITEM
4.	▶ Recognitions	1 AGENDA ITEM
5.	▶ Adoption of Agenda	
6.	▶ Public Comment	
7.	▶ Consent Agenda	3 AGENDA ITEMS
8.	▶ Presentations	

2. The **Download Agenda** modal will appear, as shown below. Select **Agenda Only** or **Agenda Packet** by clicking on the associated icon. Any RTF, TXT, DOC, XLS, PPT, or image file document attachments are converted to PDF and appended to the packet. Other file types will be included as hyperlinks on the agenda. Choose whether you want the download to be in Word or PDF format.



Generating an Agenda Packet

3. If you're choosing to download an agenda packet, decide whether you want a packet for the public or council by using the corresponding radio button. The public agenda packet contains a standard header, sections, agenda items, and a hyperlink for each attachment that was marked as *On the agenda for everyone to see*. The council agenda packet contains a standard header, sections, agenda items, and a hyperlink for each attachment that was marked either *On the agenda for everyone to see* or *On the agenda but confidential*.

If you elect to include cover pages, [agenda packets](#) will contain a cover page for each agenda item, preceding its attachments. The exception to this is agenda items for which cover pages have individually been marked as excluded via the [Agenda Item Details](#) page.

Attachments are printed as text or as links (as specified to the Granicus design team) on the report if marked as **Public** (for public packets) or **Public** and **Private** (for council packets).

Note: The attachment indicator below the **Generate Packet** button will show you whether all non-PDF attachments on agenda items belonging to this agenda have been converted to PDF. It will also indicate whether PDF attachments are ready for collation.

- If the indicator is still red, a packet can be generated, but the agenda report/cover page report links for any attachments that have not yet converted will still link to the native form (e.g., DOCX) of the file
- Non-converted files and any PDFs that were flagged will not be collated with the packet
- Click the indicator to see a list of files that have successfully converted and those that have not
- Refresh the indicator until all files that are not ready have been marked as converted

Click **Generate Packet**. You'll get a message at the bottom of the modal in purple text when the packet has been generated and is ready for download.

×

DOWNLOAD

FEBRUARY 26, 2018
CITY COUNCIL


AGENDA
ONLY

OR


AGENDA
PACKET

☒ FOR PUBLIC

THIS WILL NOT INCLUDE ITEM
ATTACHMENTS MARKED
CONFIDENTIAL

☐ FOR COUNCIL

THIS WILL INCLUDE ALL
ATTACHMENTS

☒ USE COVER PAGES

PUBLIC PACKET
HAS NOT BEEN GENERATED.

GENERATE PACKET

All attachments ready for packet generation.

Packet has not been generated. Click
the generate button to start.

DOWNLOAD

CANCEL

4. Click **Download**. The agenda download will be created using the [default template assigned to this meeting type](#). An example is shown below:



City Council Agenda

Monday, March 14, 2016 - 1:00 PM

The Council Chambers - 2440 8th Ave, Springfield, CO 80631

The meeting location is accessible to persons with disabilities. A request for an interpreter for the hearing impaired, or for other accommodations for persons with disabilities, should be made at least 48 hours in advance of the meeting to Emie Erikson, City Recorder at 555.888.1212.

The agenda may be amended during the meeting to add or delete items, change the order of agenda items, or discuss any other business deemed necessary at the time of the meeting.

1. PLEDGE OF ALLEGIANCE

2. CALL TO ORDER AND ROLL CALL

3. PUBLIC CALENDAR

This is an opportunity for members of the audience to bring to the Council's attention any item not listed on the agenda. Comments will be limited to three (3) minutes per person with a maximum of 15 minutes for all items. Speakers may not yield their time to others.

4. CONSENT CALENDAR

The consent calendar consists of items of a repeating or routine nature considered under a single action. Any Councilor may have an item on the consent agenda removed and considered separately on request

- 4.A. City Council Minutes - March 14, 2016 Special Meeting; March 14, 2016 Work Session and Regular Meeting
[MeetingMinutes031116.pdf](#)
[City-Manager-Report-3-15-.pdf](#)

- 4.B. Approval of Recommendation to the Colorado Liquor Control Commission (CLCC) to Green Giant's B & B, LLC for a Full On-Premise Sales Liquor License for a New Outlet to Green Giant's B & B, LLC located at 1815 65th Ave, Greeley, CO 80634
[03-06-16.pdf](#)

[<<< Previous: Adding an Agenda Item on the Fly](#)

[>>> Next: Publishing an Agenda](#)

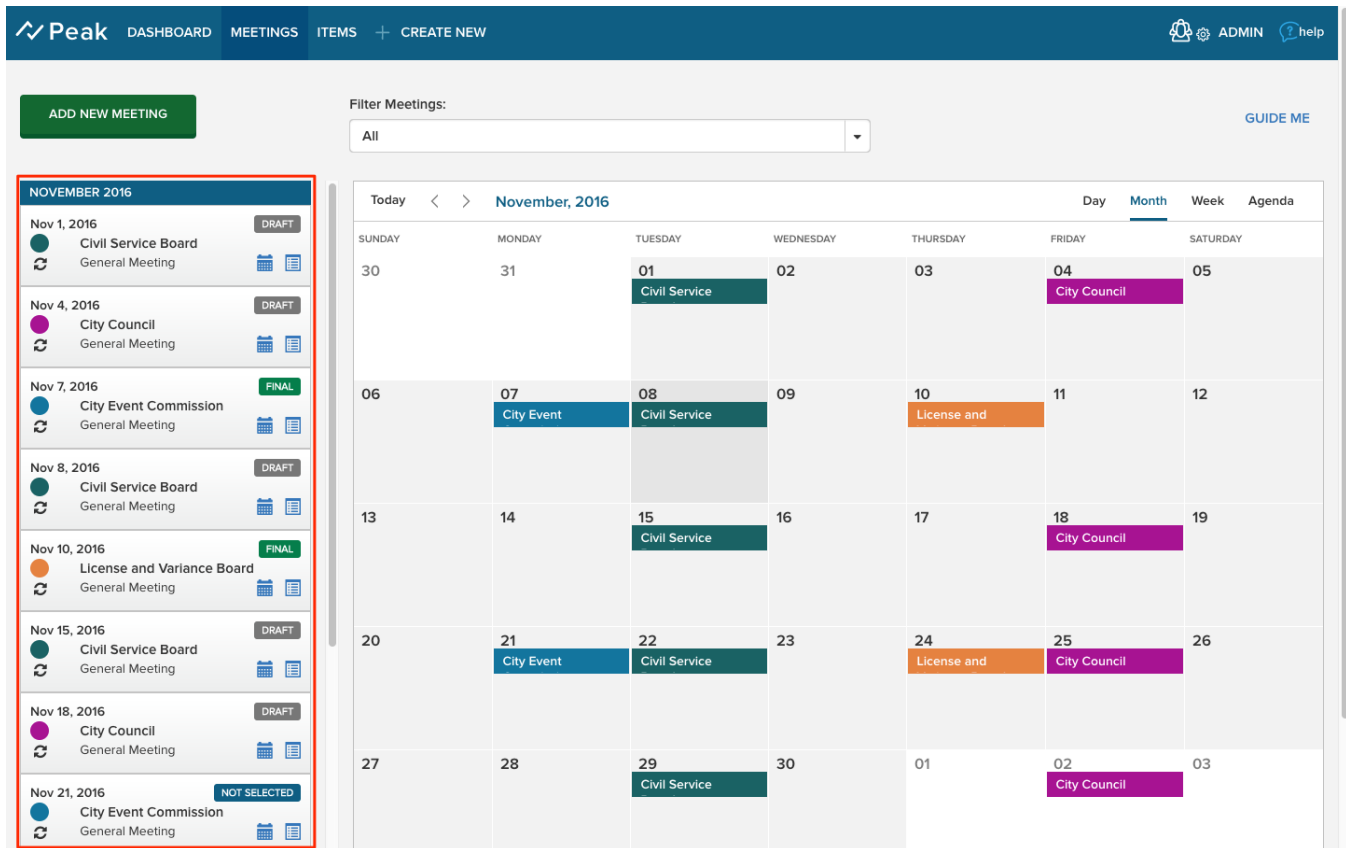
[Return to Peak help topics](#)

Editing Agenda Details in Peak

The **Agenda Details** button, which is found on each meeting card on the meetings page, provides you with a shortcut to view or edit agenda details. You can also [assign a Peak meeting body and type](#) to any meetings created at the platform level. This functionality is available to users with Agenda Coordinator or Peak Admin roles, and to Drafters for items in Final status.

To work with meetings and their associated agendas, click **Meetings** on the left-hand side of the navigation bar at the top of any page in Peak.

From the list of meetings on the left, select the meeting card associated with the agenda you wish to view or edit.



The screenshot displays the Peak Agenda Management interface. On the left, a sidebar contains a list of meetings for November 2016, each with a status (DRAFT, FINAL, NOT SELECTED) and an 'Agenda Details' icon. The main area shows a calendar view for November 2016, with dates 01 through 30. Meetings are color-coded and placed on specific dates: Civil Service (green), City Council (purple), City Event (blue), and License and (orange).

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
30	31	01 Civil Service	02	03	04 City Council	05
06	07 City Event	08 Civil Service	09	10 License and	11	12
13	14	15 Civil Service	16	17	18 City Council	19
20	21 City Event	22 Civil Service	23	24 License and	25 City Council	26
27	28	29 Civil Service	30	01	02 City Council	03

Click the **Agenda Details** icon, found at the lower right-hand corner of each meeting card. Agenda details can also be accessed by clicking on the meeting directly in the calendar, or by clicking View Agenda on the Item Details page of an item associated with the given meeting.

Nov 4, 2016

City Council

General Meeting

AGENDA READY

The following figure illustrates an example of a meeting agenda details page. The toolbar on the left gives you options to lock the agenda, view meeting details, add sections or items, and publish or download the agenda. The Manual Agenda Numbering toggle enables you to [customize your agenda numbering scheme](#).

The agenda is pre-populated with sections according to the meeting type associated with the meeting (in this case, City Council Special type). The agenda reflects any edits that have been made to the agenda and its status.

Editing Agenda

Meeting Details

Add Section

Add Item

Publish

Download

FEBRUARY 26, 2018

City Council Meeting Agenda

General Meeting

The agenda is currently editable. To lock the agenda, click the Editing Agenda button on the toolbar to the left. You can add new agenda items and sections from the toolbar as well.

Manual Agenda Numbering is Off

Meeting Status: DRAFT

EXPAND ALL SECTIONS

1. Roll Call

2. Pledge of Allegiance

3. Proclamations

4. Recognitions

5. Adoption of Agenda

CANCEL

SAVE

Toolbar Functions

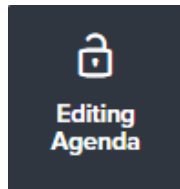
The table below describes the functions of the items on the toolbar. These buttons are operational only for users with an Agenda Coordinator or Admin role:

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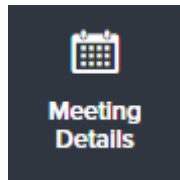
185166

Feature

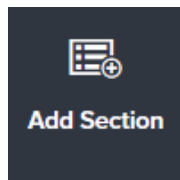
Description



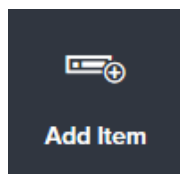
To edit details of the agenda, click the **padlock**. An unlocked padlock graphic indicates that editing is now possible. Agendas, when created, are unlocked by default; an Agenda Coordinator or Admin may lock the agenda at any time to prevent changes until the item is again unlocked.



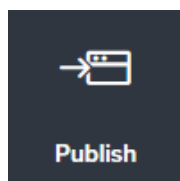
Click **Meeting Details** to go the Edit Meeting Details page, where you can [edit the location, date, time, or description of the meeting associated with this agenda](#).



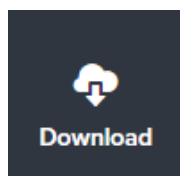
Click **Add Section** to create a new section for the agenda. You'll be able to edit, reorder, or delete sections after you add them.



Click **Add Item** to add an agenda item to this agenda. You'll be able to choose from existing items in Peak that are not already part of another agenda, or [create a new item on the fly](#).



Click **Publish** to [publish the agenda](#) to iLegislate, the Platform, or a public webpage.



Click **Download** to [download either the agenda by itself or an agenda packet](#). You'll be able to choose between Word and PDF formats for your download.

You can also change the status of the meeting by clicking the **Meeting Status** drop-down menu and selecting the status for this meeting. If the meeting is in not-final status, only Agenda Coordinators and Peak Admins can view it, while Drafters cannot. All users can view details for meetings with a final status assigned. [Status options are set up in admin](#) by a user with the Peak Admin role.

FEBRUARY 26, 2018

City Council Meeting Agenda

General Meeting

The agenda is currently editable. To lock the agenda, click the *Editing Agenda* button on the toolbar to the left. You can add new agenda items and sections from the toolbar as well.

☒ Manual Agenda Numbering is Off

Meeting Status: **DRAFT**

EXPAND ALL SECTIONS

1.

▶ Roll Call

+
trash

2.

▶ Pledge of Allegiance

+
trash

From here, you can edit, delete, or rearrange the order of the sections. Use the **trash can** (



) to delete a section, and the drag-and-drop **handles** (



) to drag the section to a new location within the agenda. Be sure to click **Save** at the bottom of the screen to save your changes to the agenda.

You can edit an agenda section by clicking the **arrow** to expand it. Or, expand all sections at once by clicking the **Expand All Sections** button at the top. There will be agenda item cards for each agenda item. Item cards include the agenda item's name, [ID number](#), [status](#), [record number](#), any associated attachments, and the current approvers. [Read more about item cards here.](#)

FEBRUARY 26, 2018 **City Council Meeting Agenda**
General Meeting

The agenda is currently editable. To lock the agenda, click the Editing Agenda button on the toolbar to the left. You can add new agenda items and sections from the toolbar as well.

☐ Manual Agenda Numbering is Off Meeting Status: **DRAFT**

EXPAND ALL SECTIONS

1. ▶ Roll Call
2. ▶ Pledge of Allegiance
3. ▼ Proclamations

3.a. **APPROVED** Clerk to the Board Day 2018 **V1**

0 ATTACHMENTS **Cover Page Included**
4. ▶ Recognitions

Use the **pencil** (



) to edit details of the section such as the section title, the standard text, and whether the section is part of the numbering scheme. There is also a **pencil** for the agenda items themselves, and clicking it will take you to the Edit [Agenda Item](#) page. Use the drag-and-drop **handles** (



) to reorder agenda items, and the **x** icon (



) to remove an agenda item.

Removing an item removes it from this agenda, but it will remain in Peak and will be available for use elsewhere. You can also [Amend the item](#) from here to create an additional record of it.

The following figure shows an example of an agenda item in edit mode. Note the **padlock** button on the left-hand side. After saving any changes you have made, click this button to lock the item, preventing further edits. This functionality is available to users with Agenda Coordinator or Admin roles, as well as the Drafter of this item.

Agenda Item Details

 AMEND

< PREV

1
2

NEXT >



Editing Item



Set to
Approved



Duplicate
Item



View Agenda



Cover Page
Included



Download



2016-197-Granicus

Clerk to the Board Day 2017

V2



IN DRAFT

0 ATTACHMENTS

 Cover Page Included

ITEM DETAILS APPROVAL STATUS

ITEM TITLE *

Clerk to the Board Day 2017

SUGGESTED ACTION

Assigning a Meeting Body and Type to a Platform Meeting

By clicking the **agenda details** button on an [event created at the platform level](#) (denoted by a dark blue color assignment), you can assign a Peak meeting body and type to the meeting. You'll get a message that the meeting does not have an associated body or type. Use the drop-down menu to choose a meeting body and type.

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189
 170

NOVEMBER 2, 2015

Budget Committee Appointments Meeting Agenda

The agenda is currently editable. To lock the agenda, click the Editing Agenda button on the toolbar to the left. You can add new agenda items and sections from the toolbar as well.

This meeting does not have a Meeting Body associated. Please select a Meeting Body and Meeting Type below.

Select a Meeting Body



Select a Meeting Type



SAVE

[<<< Previous: Editing Meeting Details](#)

[>>> Next: Customizing Agenda Numbering](#)

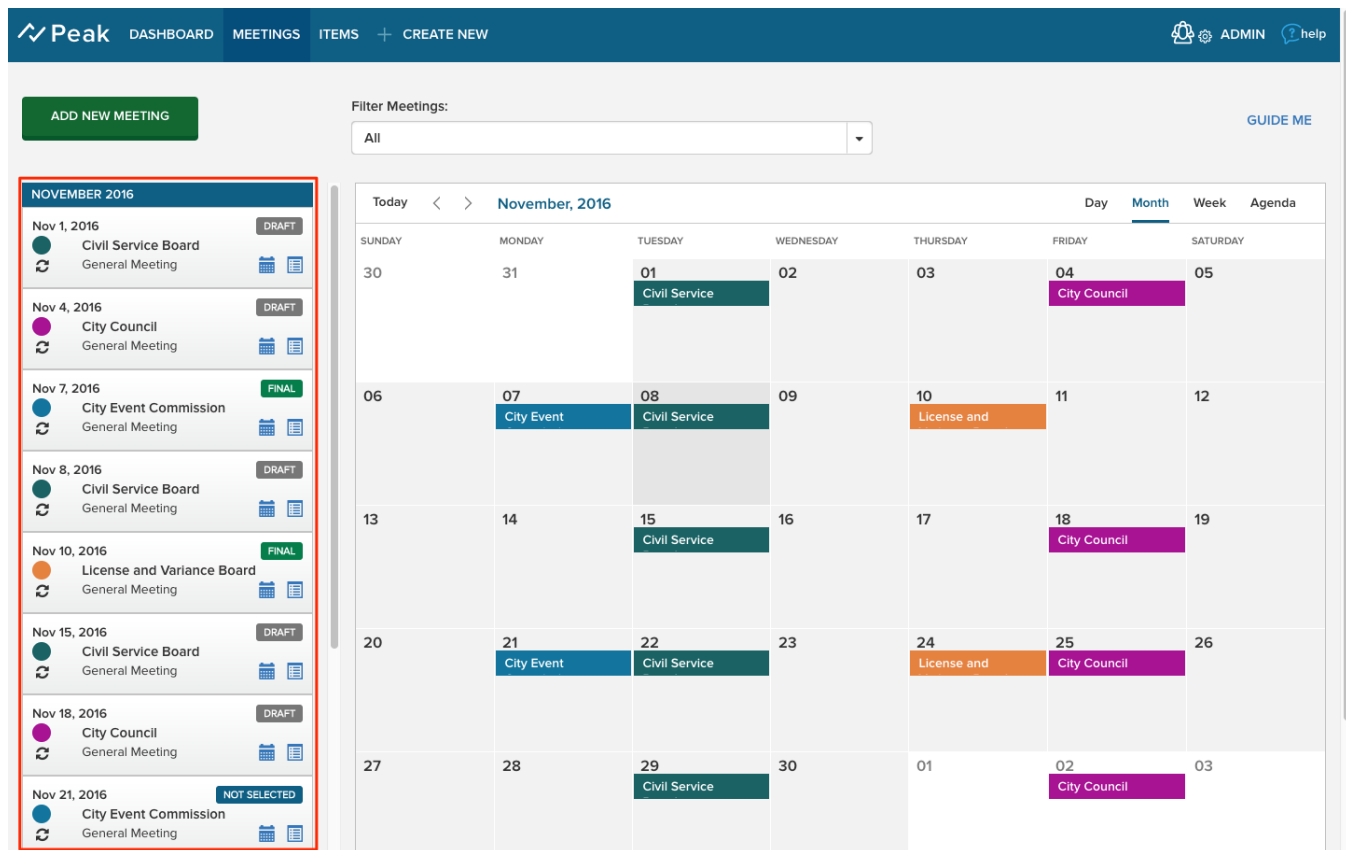
[Return to Peak help topics](#)

Editing Meeting Details in Peak

The **Meeting Details** button, which is found on each meeting card on the meetings page, provides you with a shortcut to view or edit meeting details. This functionality is available to users with Agenda Coordinator or Peak Admin roles.

To work with meetings, click **Meetings** on left-hand side of the navigation bar at the top of any page in Peak.

1. From the list of meetings on the left, select the meeting card for the meeting you'd like to view or edit.



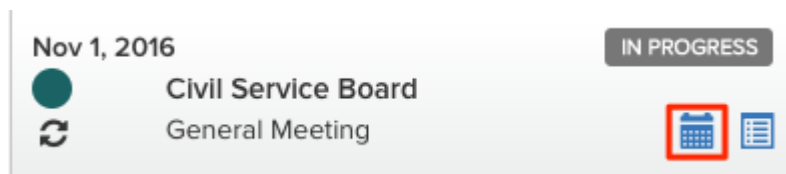
The screenshot shows the Peak Agenda Management interface. On the left, there is a list of meetings for November 2016. The meetings are:

- Nov 1, 2016: Civil Service Board General Meeting (DRAFT)
- Nov 4, 2016: City Council General Meeting (DRAFT)
- Nov 7, 2016: City Event Commission General Meeting (FINAL)
- Nov 8, 2016: Civil Service Board General Meeting (DRAFT)
- Nov 10, 2016: License and Variance Board General Meeting (FINAL)
- Nov 15, 2016: Civil Service Board General Meeting (DRAFT)
- Nov 18, 2016: City Council General Meeting (DRAFT)
- Nov 21, 2016: City Event Commission General Meeting (NOT SELECTED)

On the right, there is a calendar view for November 2016. The calendar shows the following events:

- Nov 1: Civil Service
- Nov 4: City Council
- Nov 7: City Event
- Nov 8: Civil Service
- Nov 10: License and
- Nov 15: Civil Service
- Nov 18: City Council
- Nov 21: City Council

2. Click the **Meeting Details** icon, found at the lower right-hand corner of each meeting card:



The close-up shows a meeting card for Nov 1, 2016: Civil Service Board General Meeting. The card is marked as 'IN PROGRESS'. In the bottom right corner, there are two icons: a calendar icon (highlighted with a red box) and a list icon.

3. If the meeting is a series, decide whether you want to edit this instance of the meeting only, or the entire series. To edit the series, select **Series**. On the right, you'll see a list of the meetings in the series.

OCCURRENCE

SERIES

This is a recurring meeting. On the right you will find a list of the meetings in the series for this meeting.

You're currently editing a single meeting occurrence. Your changes will only be applied to the meeting on January 22nd 2018, 5:00pm.

MEETING BODY *
City Council

MEETING LOCATION

JANUARY 2018

Jan 22, 2018

City Council

General Meeting

DRAFT

Jan 29, 2018

City Council

General Meeting

DRAFT

FEBRUARY 2018

Feb 5, 2018

City Council

General Meeting

DRAFT

4. Click within any of the following fields to edit details: **Meeting Location**, **Date**, **Time**, **Item Submission Deadline**, **Cutoff Time**, **Description**, and **Advanced Settings**. The following figure shows an example of meeting details for a meeting that is not part of a series:

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192173

MEETING BODY *

City Council

MEETING LOCATION**MEETING TYPE *** ▼**DATE *** **START TIME *** **END TIME *** **MEETING LENGTH**

1 hour

ITEM SUBMISSION DEADLINE **CUTOFF TIME** **DESCRIPTION****ADVANCED SETTINGS ▼**

Editing a series will also give you the recurrence pattern options:

REPEATS * ▼**ON THE *** **DAY*** ▼**EVERY *** months

5. Click the green **Save** button to update any details that have changed. If you're editing a series, the updates will be applied to this and all subsequent meetings in the series.

6. To delete the meeting, click the **trash can** icon in the upper right-hand corner. A modal will appear asking you to confirm the deletion. If the meeting you're deleting is part of a series, you'll have the option to delete this single occurrence of the meeting, or delete the entire series. Meetings in the series that have already occurred will not be deleted.



Are you sure you want to delete this meeting or series?

DELETE SERIES

DELETE MEETING

Cancel

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

[<<< Previous: Advanced Settings for Meetings](#)

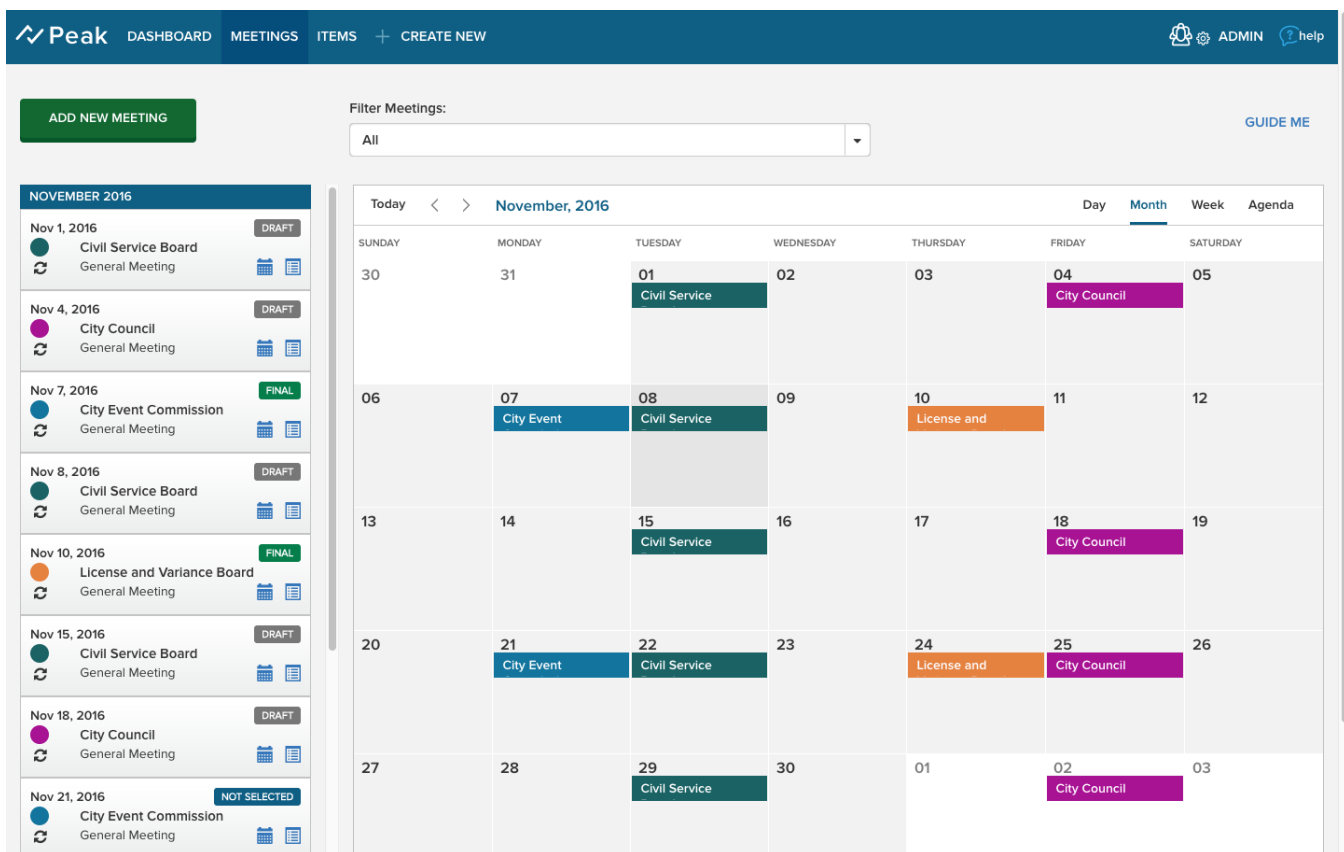
[>>> Next: Editing Agenda Details](#)

[Return to Peak help topics](#)

Navigating the Meetings Page in Peak

The Meetings page houses a calendar of all scheduled meetings as well as a scrolling list, in chronological order, of upcoming meetings. By default, the Month view of the calendar is shown, displaying the current month, one week prior, and one week after. Use this page to view and manage all meetings in Peak.

To work with meetings, click **Meetings** on left-hand side of the navigation bar at the top of any page in Peak.



The screenshot shows the Peak Meetings page. At the top is a navigation bar with 'Peak', 'DASHBOARD', 'MEETINGS' (selected), 'ITEMS', and '+ CREATE NEW'. On the right of the navigation bar are 'ADMIN' and 'help' links. Below the navigation bar is a 'Filter Meetings:' dropdown set to 'All' and a 'GUIDE ME' link. The main content area is divided into two sections. On the left is a scrolling list of meetings for November 2016. Each meeting card includes the date, meeting name, meeting body, meeting type, and status (DRAFT, FINAL, NOT SELECTED). On the right is a calendar view for November 2016. The calendar has tabs for 'Day', 'Month' (selected), 'Week', and 'Agenda'. The calendar grid shows dates from Sunday 30 to Saturday 03. Meetings are color-coded by meeting body: Civil Service Board (dark blue), City Council (purple), City Event Commission (blue), License and Variance Board (orange), and City Event Commission (blue). The meeting cards on the left provide details for each meeting, including the date, meeting name, meeting body, meeting type, and status.

Meetings are **color-coded by meeting body** to help you quickly identify meetings. The meeting cards in the scrolling list at the left provide details of each meeting—from there, you can access meeting details and the meeting agenda.

Note: Meetings created at the platform level show up in Peak as dark blue and are labeled with the name of the event. These events do not have an associated meeting body or meeting type and will be labeled in the list with the event name only. A Peak meeting body and meeting type may be assigned to these meetings by editing the agenda for this meeting. In this case, the meeting will maintain its event name in the calendar, the meeting type will display on the left, and the meeting will be color-coded according to the associated meeting body.

Use the arrows at the upper left to move back and forth chronologically on the calendar. You can also customize your view by clicking on **Day**, **Month**, **Week**, or **Agenda** in the upper right above the calendar:

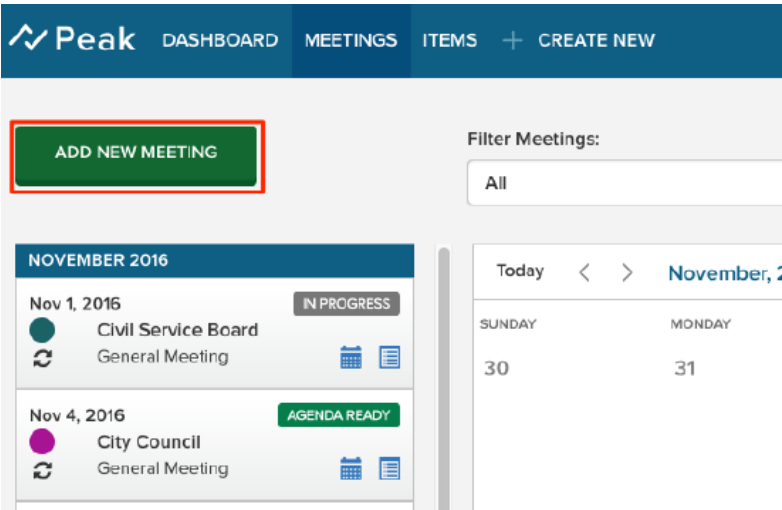
Today < > October, 2015							Day	Month	Week	Agenda
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY				
27	28 Budget Committee	29 City Council Utilities Board ...	30	01	02	03				
04	05 Budget Committee	06 Utilities Board	07 Training Team	08	09	10				

The **Agenda** view will show one week of meetings in a list format. Click **Agenda** on the view options, then click the date range that appears above the list. Select the starting date of the week you'd like to view. Meetings falling on dates up to but not including the end date will be shown in the list.

Today < > Thursday, June 23, 2016-Thursday, June 30, 2016			Day	Month	Week	Agenda
DATE	TIME	EVENT				
23 Thursday June, 2016	10:00 AM-11:00 AM	License and Variance Board				
24 Friday June, 2016	3:00 PM-4:00 PM	Fine Art Comission				
28 Tuesday June, 2016	4:00 PM-5:00 PM	Small Business Council				
29 Wednesday June, 2016	2:00 PM-3:00 PM	City Development Planning Board				

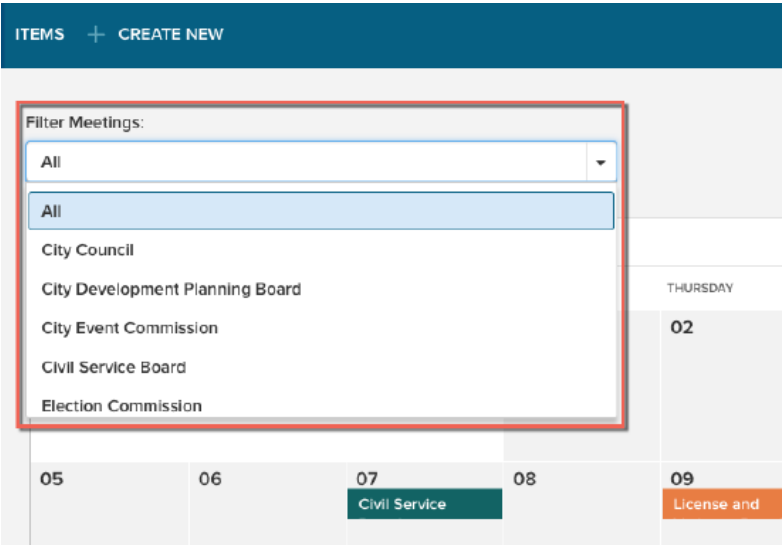
The table below outlines key features of the Meetings page:

Feature	Description
Add New Meeting	The Add New Meeting button takes you to the new meeting screen, where you can schedule and fill in details for a meeting. This button is only visible to those users with an Agenda Coordinator or Peak Admin role.



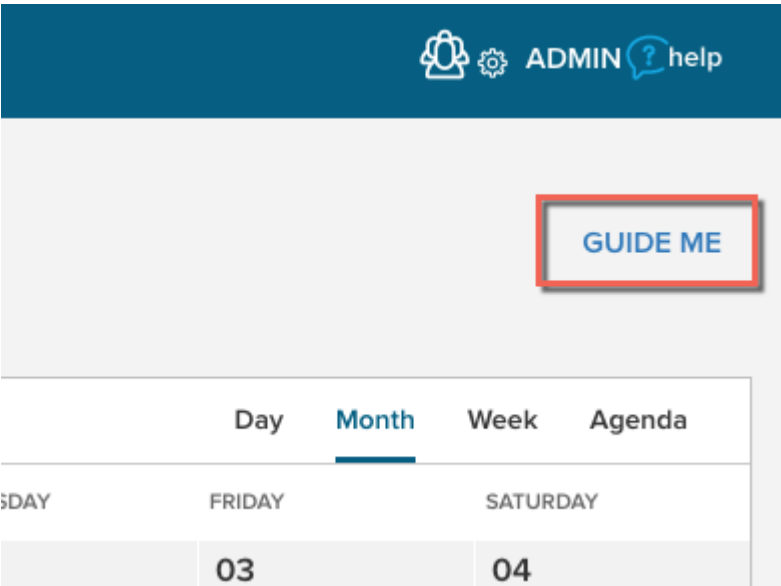
This drop-down menu allows you to view only those meetings associated with the selected body. Note: The filters remain active as you travel between different calendar views.

Filter Meetings



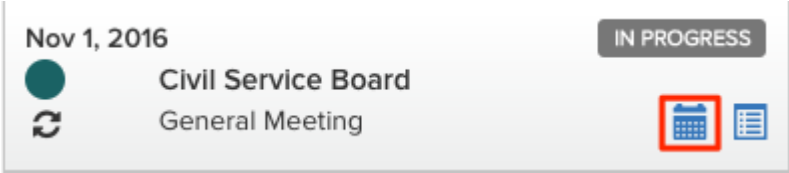
Guide Me

This in-app help guide, accessed in the upper right-hand corner, will take you through each feature on the page.



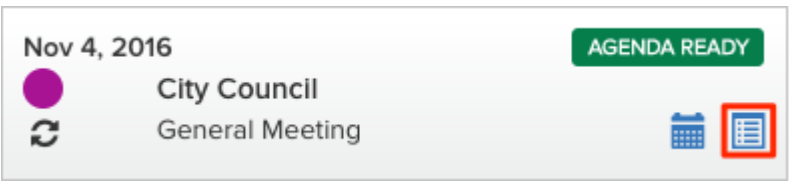
The **Meeting Details** button allows you to [quickly view or edit](#) the details for the selected meeting. This button is only visible to those users with an Agenda Coordinator or Peak Admin role.

Meeting Card: Manage Meeting Details



The **Agenda Details** button allows you to [quickly view or edit](#) the details for the selected agenda. This button is visible to those users with an Agenda Coordinator or Peak Admin role; for those agendas that are in a Final status, it will also show up for Drafters. Agenda details can also be accessed by clicking on the meeting entry in the calendar itself.

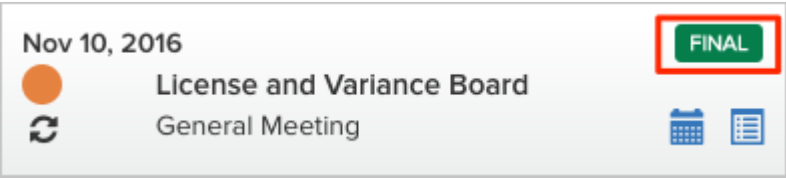
Meeting Card: Manage Agenda Details



Agenda Status

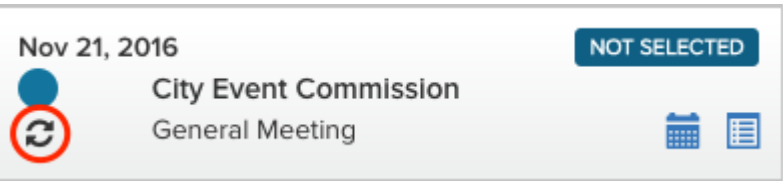
The [agenda status](#) will show in the corner of each card. As an Agenda Coordinator or Peak Admin works on an agenda, they can change the status, which will be reflected here on the meeting cards. Status names, e.g., **Draft**, **Agenda Ready**, and **Final**, are defined in

Admin. Draft statuses will be highlighted in gray, and final statuses will be highlighted in green. If no status has been assigned; the default **Not Selected** will be applied with a blue background.



This icon indicates that this meeting is one of a series of meetings. The icon is not present on cards that represent a one-time meeting.

Recurring Meeting Icon



[<<< Previous: Configuring Site Information](#)

[>>> Next: Creating a New Meeting](#)

[Return to Peak help topics](#)

Publishing an Agenda in Peak

A Peak Admin or Agenda Coordinator can publish a Peak agenda to MediaManager. Both the meeting information and the agenda with its items and attachments publish to MediaManager. There are two options: publish to iLegislate and publish to the web.

- When published to iLegislate, the agenda can be viewed along with the corresponding event on the Granicus platform (MediaManager). This option also publishes the agenda to iLegislate so that a user with a Peak login and password can access the agenda there.
- Publishing to the web gives you all the functionality described above, and you can also select a view for the agenda from the drop-down menu. The menu is populated with view pages from your platform.

1. To publish the agenda you're working with, click the **Publish** button on the left-hand side of the [Edit Agenda Details](#) page.



Agenda Locked

Meeting Details

Add Section

Add Item

Publish

Download

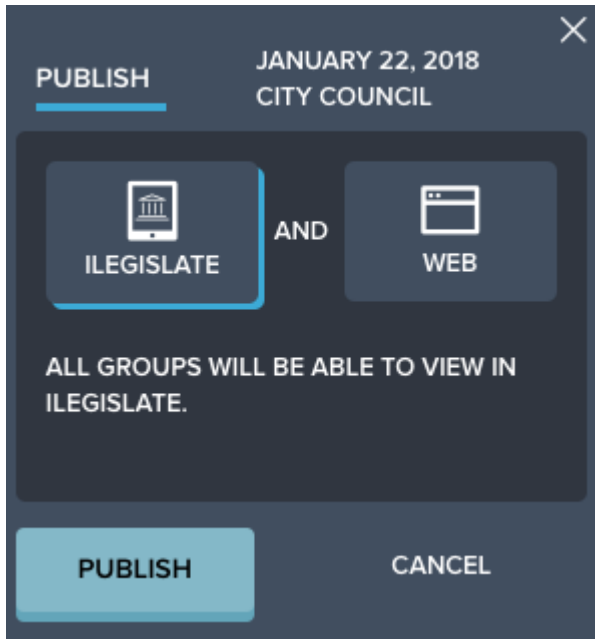
JANUARY 22, 2018
City Council Meeting Agenda
General Meeting

The agenda is not currently editable. To unlock the agenda, click the Agenda Locked button on the toolbar to the left.

Meeting Status: FINAL

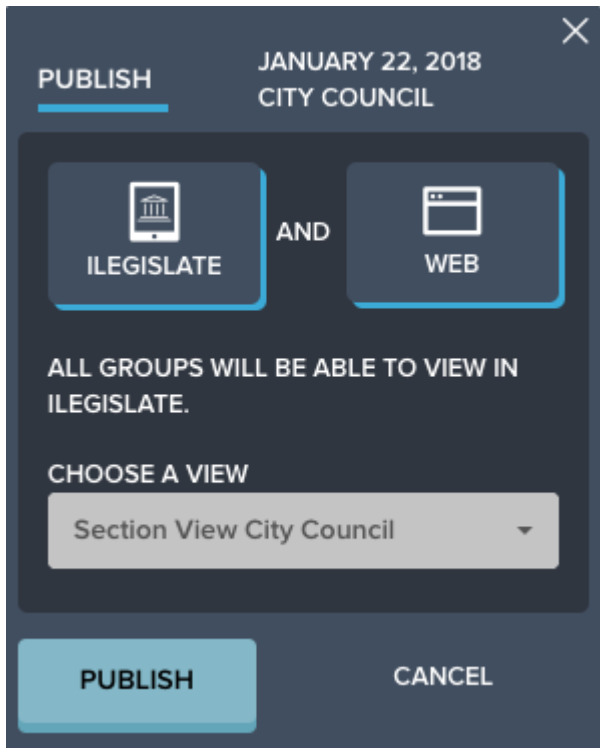
- Roll Call
- Pledge of Allegiance
- Proclamations
- Recognitions
- Adoption of Agenda
- Public Comment
- Consent Agenda 4 AGENDA ITEMS
- Presentations

2. The **Publish Agenda** modal displays, as shown below. Choose whether you want to publish to **iLegislate**, **Web**, or both by clicking the icons.



The screenshot shows a dark-themed modal window titled "PUBLISH" with a close button (X) in the top right corner. Below the title, the date and location "JANUARY 22, 2018 CITY COUNCIL" are displayed. The main content area features two large buttons: "ILEGISLATE" (with a building icon) and "WEB" (with a browser icon), separated by the word "AND". The "ILEGISLATE" button is highlighted with a blue border. Below these buttons, a message states: "ALL GROUPS WILL BE ABLE TO VIEW IN ILEGISLATE." At the bottom, there are two buttons: "PUBLISH" (highlighted in blue) and "CANCEL".

3. If you are publishing to the web, select a view page from the **Choose a View** drop-down menu. This menu is populated with the Content Views from your Granicus platform under **Admin > Views**.



This screenshot shows the same "PUBLISH" modal window as above, but with the "WEB" button highlighted with a blue border. Below the "ILEGISLATE" and "WEB" buttons, the same message "ALL GROUPS WILL BE ABLE TO VIEW IN ILEGISLATE." is present. Below this message, a new section titled "CHOOSE A VIEW" is visible, containing a drop-down menu. The menu is currently set to "Section View City Council" with a downward arrow. At the bottom, the "PUBLISH" and "CANCEL" buttons remain.

4. Click **Publish**. You'll now be able to view the agenda and its attachments on MediaManager or your selected view page. Microsoft documents will be converted to PDF format. On MediaManager, you can view the published agenda by navigating to the Events tab and then clicking **View Agenda** next to the event.

If an agenda packet has been previously generated, clicking **Publish** will publish both the agenda and the agenda packet. If anything has changed in the agenda, regenerate both the agenda and the packet so that when you publish, both will be current. The agenda packet will display only on the view page.

[Home](#)
[Events](#)
[Archives](#)
[Reports](#)
[Admin](#)

[New Event](#)

◀ ▶

Dec 31, 2017 - Jan 30, 2018

[Go to Today](#)

◀ ▶ Dec 2017 Su Mo Tu We Th Fr Sa						
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Tue Jan 2, 2018	2:00 PM	⌘ Civil Service Board	Agenda Not Published	Actions ▼
Fri Jan 5, 2018	2:00 PM	⌘ License and Variance Board	Agenda Not Published	Actions ▼
Tue Jan 9, 2018	2:00 PM	⌘ Civil Service Board	Agenda Not Published	Actions ▼
Thu Jan 11, 2018	4:30 PM	City Event Commission	Agenda Not Published	Actions ▼
Fri Jan 12, 2018	2:00 PM	⌘ License and Variance Board	Agenda Not Published	Actions ▼
Tue Jan 16, 2018	2:00 PM	⌘ Civil Service Board	Agenda Not Published	Actions ▼
Fri Jan 19, 2018	2:00 PM	⌘ License and Variance Board	Agenda Not Published	Actions ▼
Mon Jan 22, 2018	5:00 PM	⌘ City Council	View Agenda	Actions ▼
Tue Jan 23, 2018	2:00 PM	⌘ Civil Service Board	Agenda Not Published	Actions ▼

Item cover pages may be included in the published agenda depending on how Admin is set up. Contact your Peak Admin to see how this is set up in your system.

Note: Once you click **Publish**, your agenda becomes locked to prevent changes. An Agenda Coordinator or Peak Admin can unlock to enable further edits. Because publishing itself does not recreate the agenda packet, it is always best to continue to follow this order whenever changes are made to agenda:

1. [Download the agenda](#) (this generates the report)
2. [Generate the agenda packet](#)
3. Publish to iLegislate or the web as described above

[<<< Previous: Downloading an Agenda](#)

[>>> Next: Navigating the Items Page](#)

[Return to Peak help topics](#)

Video Production Commission Agenda Item Report

Meeting Date: October 14, 2019

Submitted by: Joe Drafter

Submitting Department:

Item Type: Minutes

Agenda Section: Business

Subject:

test approval for training

Suggested Action:

adopt to approve xxxxxx

Attachments:

[Peak Agenda Management.pdf](#)

Peak Agenda Management

Welcome to Peak Agenda Management! Click the links below to learn more about this application.

[>>Download this guide as a PDF](#)

[Frequently Asked Questions](#)

Find the answers to common questions asked about Peak Agenda Management.

[Getting Started](#)

Here you can learn the basics of logging in and navigating the application.

[Peak Admin](#)

In Peak Admin, you'll set up meeting bodies and departments, manage users and user groups, create meeting and agenda item types, and configure your site settings. The topics on the left correspond to the sections of Admin in your Peak system. Click the links below for more information about each task.

[Peak Meetings](#)

Learn how to create and edit meetings and customize, download, and publish meeting agendas.

[Peak Agenda Items](#)

In this section, learn how to draft and edit agenda items and generate agenda packets for the public or council.

[Peak Workflow](#)

Read about Peak's Approval Workflow feature and learn how to set up and modify workflows.

[What's New in Peak](#)

Read the latest Peak Agenda Management release notes to learn about new features and changes to the application.

Peak: Frequently Asked Questions

Agenda Items

Q: How do I know if my agenda items are overdue?

A: The [Dashboard](#) will give quick access to your items. You can also go to the [Items page](#) to see all items, or use the filters to view only your items or items needing your approval.

Q: How do I add a last-minute agenda item?

A: A last-minute item can be added in the same way you [add any item](#).

Q: How does Peak track legislative history?

A: Peak does not track legislative history at this time. Legislative history is defined as historical actions, votes, or notes that are recorded on an item.

Q: What is the maximum file size for agenda item attachments?

Each attachment can be up to 200 MB in size. Most Windows- and Mac-based file types are supported. For a full list of supported file types, see the [technical solutions guide](#).. All files will be converted to PDF for packet generation.

Agendas and Meetings

Q: Once an agenda is published, can I make changes?

A: Yes, changes can be made by an [Agenda Coordinator or Peak Admin](#) after an agenda is published. However, the changes will not automatically be published, so the [agenda should be published again](#) anytime changes are made.

Q: When an is agenda final, what does clicking the padlock do?

A: A locked agenda will prevent changes from being made. Only users with the proper permissions can unlock a locked agenda.

Q: What types of reports can I create?

A: Peak supports creating a single agenda report and item cover page.

Q: Does Peak include minutes?

A: No. In order to use minutes, you would need to add our Meeting Efficiency Suite.

Q: Some of my meetings are internal only or private. Can I hide meetings from the view page/public?

A: Yes. To keep the meeting private, do not publish the meeting's agenda.

Q: What purpose does the Meeting Status serve?

A: The status controls who can see the agenda. If an agenda is in Draft status, only Agenda Coordinators and Peak Admins can see it. Once the agenda is designated as Final, Drafters can also see it.

Q: Are agendas converted to PDF before publishing?

A: Yes. Peak uses a Universal File Converter to support PDF generation.

Q: Can I have different agenda report templates for different meeting bodies?

A: Yes! Jurisdictions and organizations using Peak have the option of requesting multiple custom agenda templates. This enables you to have customized format and logo for as many meeting bodies as you need. Contact [Customer Care](#) to request your customized report templates.

Approval Workflows

Q: How do I get notifications for the items I need to approve?

A: [Notifications are automatically sent via email](#), and any approvals waiting your review will be listed on your dashboard.

Q: How do I prompt an Approver who has not yet approved an item?

A: Approvers will automatically [receive an email](#) when assigned to an approval workflow phase. Any open approvals can be accessed via the [Dashboard](#) or the [Items page](#).

Q: Can Admins set workflows so users do not have privileges to alter them?

A: Not at this time.

Q: Can an Approver make modifications to an item when they are requested to approve an item?

A: Yes. When approvers are requested to approve a file, they can also edit all the item details, as well attachments—just as the drafter can. See full details in the [release notes for this feature](#).

Installation/Deployment

Q: Is this software available only as a cloud-based solution, or can we install it on-premise as well?

Peak is available only as a cloud-based application.

Q: What is the standard timeline for successful go-live?

A: Our goal is for you to go live in 30 days or less.

Q: What is included in the training?

A: Your Peak training will include access to our interactive, self-guided training to help you familiarize your team with Peak at the beginning of your deployment. The solution then includes 3, 2-hour sessions covering administration, drafting functionality, agenda posting procedures, and review.

Q: What happens if your server goes down?

A: Our solution is designed with redundant failover to provide 99.9 percent uptime.

Integration with Other Programs

Q: How does this integrate with our other Granicus solutions?

A: Peak is a platform application, so it seamlessly integrates with MediaManager, iLegislate, LiveManager, etc.

Q: How does Peak integrate with Word? Adobe?

A: Agenda reports can be produced in Word and PDF, but there is no direct integration with Word or Adobe.

Q: Does Peak allow for the use of electronic signatures?

A: No, Peak does not support electronic signatures at this time.

Q: Does Peak have a Laserfiche Integration?

A: No, Peak does not have a Laserfiche integration at this time.

Q: Can Peak integrate with Outlook?

A: No, Peak does not integrate with Outlook at this time.

Logging In

Q: How do I set my password and log in if I don't get my Peak welcome email?

A: It's a good idea to check your spam filter. If you cannot find the email with login instructions, [check out this article](#) on an alternative way to set your password and log in.

People Records

Q: Why do I have duplicate records of something I created? For example, I created a new Person record, and now there are two people with the same name.

A: A duplicate record can be inadvertently created throughout Peak if the **Save** button is double-clicked. It is necessary to click **Save** only once. If you have created an extra record that you don't need, it can be deleted using the **trash can** icon.

Q: Why do I have a blank Person record?

A: If applications with duplicate emails are submitted using the Quick Add feature in Boards and Commissions, corresponding blank people records are created in Peak. Blank or "null" records can be deleted using the **trash can** icon.

Q: How do I change a user's password?

A: A system administrator must perform this action by navigating to the **Apps** menu in the upper right-hand corner of the page, selecting **Users and Groups**, then selecting **Edit** from the **Actions** drop-down menu next to a user's name.

Pricing

Q: How do we get information on pricing?

Pricing is based on population tiers. Please contact your Granicus Account Executive for more information.

Q: Do you offer different packages? For instance, I need this for only two meeting bodies.

A: No. The price is population-based, and once you have Peak, it can be used for as many meeting bodies as you like.

Roles/User Permissions

Q: What different roles/levels of user permissions does Peak have?

A: Peak has the following [user roles](#):

- **None:** No permission in the system; for users who need to approve items only
- **View Only:** Users can view items in the system in read-only mode, and they can approve items assigned to them
- **Drafter:** Full permission on agenda items and approval workflows
- **Agenda Coordinator:** Inherits Drafter permissions, plus full permissions on meetings and agendas
- **Peak Admin:** Full control over the entire application and access to the Admin portion of the application

Q: Can someone have multiple roles to support their participation in multiple meeting bodies?

Each user has only one role that is applied throughout Peak. You can [assign a role collectively to all members of a group](#), but it is important to note that a user's individual role assigned on the **People** tab takes precedence over a group role assignment. For users that are assigned to more than one group, the user will have the highest permission level assigned to any group they are a member of.

Q: I assigned a group role, but the role did not apply to everyone in the group. Why not?

A: If a user has an individual role already assigned, that overrides any group role subsequently applied. To change an individual role, go to **Admin > People > Manage People > Users**. Click the **pencil** icon next to the user whose role you wish to edit, then choose a new role from the **Change Role** drop-down menu.

Supported File Types and Screen Resolutions

Q: Can I use Microsoft Surface to access Peak?

A: Yes, the Surface's screen resolution is supported. See the [Peak technical solutions guide](#) for a list of supported screen resolutions.

Q: Can I upload any file type?

A: You can upload plain text, Microsoft Office, PDF, and image files. For a full list of supported file types, see the [technical solutions guide](#).

Troubleshooting

Q: Why can't I delete my agenda items or meeting statuses?

A: Be sure that you do not have dialog boxes turned off in your browser. Deletion functionality in Peak uses dialog boxes as confirmation, and if you've prevented dialog boxes, nothing will happen when you click **Delete**.

[Return to Peak help topics](#)

Peak Agenda Management: Admin

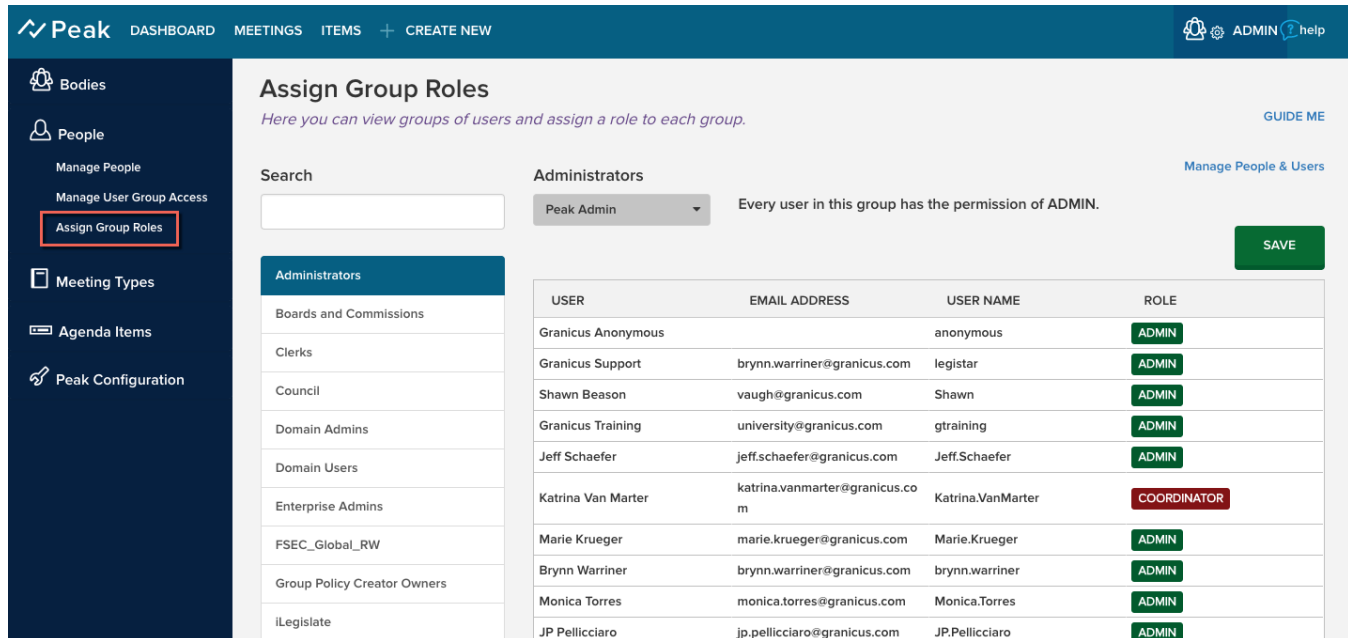
In Peak Admin, you'll set up meeting bodies and departments, manage users and user groups, create meeting and agenda item types, and configure your site settings. The topics on the left correspond to the sections of Admin in your Peak system. Click the links below for more information about each task.

Bodies	Creating Departments
	Creating Meeting Bodies
People	Creating and Managing People
	Role Definitions
	Managing User Group Access
Meetings	Assigning Group Roles
	Creating Meeting Types
	Creating Meeting Statuses
Agenda Items	Creating Item Types
	Customizing Agenda Item IDs
	Customizing the Item Template
Configuring Peak	Managing Workflow Approvals
	Configuring Site Information
	Site-wide Settings

Assigning Group Roles in Peak

The Assign Roles page allows you to take a [group from the Granicus Platform](#) and quickly assign a [Peak role](#) to the entire group, giving all members of the group the selected permission level.

To work with group roles, click **Admin** in the upper right-hand corner. Choose **People** from the menu on the left, then select **Assign Group Roles**. You can also access this page by clicking Assign Roles in the upper right-hand corner of the [Manage People](#) page. **Note:** Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Assign Group Roles
Here you can view groups of users and assign a role to each group.

GUIDE ME
[Manage People & Users](#)

Search:

Administrators: **Peak Admin** (dropdown menu)
 Every user in this group has the permission of ADMIN.

SAVE

USER	EMAIL ADDRESS	USER NAME	ROLE
Granicus Anonymous		anonymous	ADMIN
Granicus Support	brynn.warriner@granicus.com	legistar	ADMIN
Shawn Beason	vaugh@granicus.com	Shawn	ADMIN
Granicus Training	university@granicus.com	gtraining	ADMIN
Jeff Schaefer	jeff.schaefer@granicus.com	Jeff.Schaefer	ADMIN
Katrina Van Marter	katrina.vanmarter@granicus.com	Katrina.VanMarter	COORDINATOR
Marie Krueger	marie.krueger@granicus.com	Marie.Krueger	ADMIN
Brynn Warriner	brynn.warriner@granicus.com	brynn.warriner	ADMIN
Monica Torres	monica.torres@granicus.com	Monica.Torres	ADMIN
JP Pellicciaro	jp.pellicciaro@granicus.com	JP.Pellicciaro	ADMIN

Next, select the group you would like to modify from the list on the left. You can use the **Search** field at the upper left to quickly find a group. Once you click the group name, the group's members show up in a list on the right side of the page. Click the drop-down menu to select which [role—or level of permission](#)—you want the members of this group to have:

Assign Group Roles

Here you can view groups of users and assign a role to each group.

[GUIDE ME](#)

[Manage People & Users](#)

Search

- Administrators
- Boards and Commissions**
- Clerks
- Council
- Domain Admins
- Domain Users
- Enterprise Admins
- FSEC_Global_RW
- Group Policy Creator Owners

Boards and Commissions

None

None

View Only

Drafter

Agenda Coordinator

Peak Admin

Albert Einstein

Every user in this group has the permission of NONE.

SAVE

	EMAIL ADDRESS	USER NAME	ROLE
	ldanes@elearning.com	ldanes	NONE
	kens@granicus.com	KennethS	NONE
	brynn@gmail.com	Albert.Einstein	ADMIN
Jeff Schaefer	jeff.schaefer@granicus.com	Jeff.Schaefer	ADMIN
Brynn Warriner	brynn.warriner@granicus.com	brynn.warriner	ADMIN
Jessica Heberton	jessicah@granicus.com	jessicah	NONE
Cynthia Morton	cmorton@granicus.com	Cynthia.Morton	COORDINATOR
Ken Slattery	kens@granicus.com	KenS	NONE
Joseph Henderson	jhenderson@granicus.com	jhenderson	COORDINATOR

Note: A user with an individual role assigned will not update to the role assigned the group, as the individual permissions overrides the group role. Also, if a user belongs to more than one group with assigned roles, the highest ranking role will apply to that user.

Click the green **Save** button at the upper right to save the role you have applied to this group.

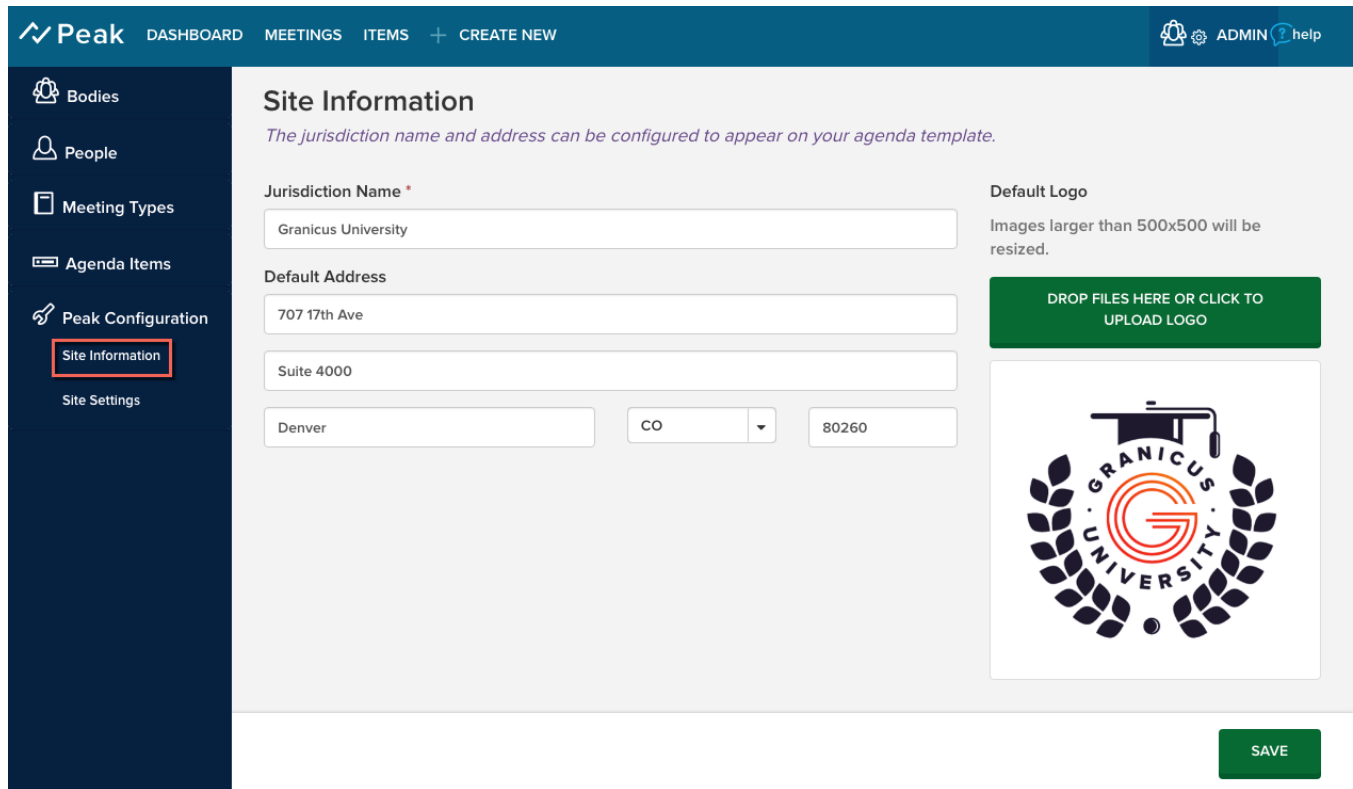
[<<< Previous: Managing User Group Access](#)

[>>> Next: Creating Meeting Types](#)

[Return to Peak help topics](#)

Configuring Site Information in Peak

Peak allows you to configure basic site information as it relates to your jurisdiction. To enter your organization's information, click **Admin** in the upper right-hand corner of the Peak dashboard. Choose **Peak Configuration** from the menu on the left, then select **Site Information**. Note: Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Peak DASHBOARD MEETINGS ITEMS + CREATE NEW ADMIN help

Site Information
The jurisdiction name and address can be configured to appear on your agenda template.

Jurisdiction Name *

Default Address

Default Logo
 Images larger than 500x500 will be resized.
 DROP FILES HERE OR CLICK TO UPLOAD LOGO



SAVE

Now you can enter the details for your jurisdiction. Click the green **Save** button at the bottom to store your information.

Field	Action
Jurisdiction Name	Click the field, then enter your jurisdiction name.
Address	Click the fields, then enter address details as needed.
Default Logo	Click the Drop Files Here or Click to Upload Logo button, then choose a file from your local computer or network to upload. You can also drag an

image file over the **Drop Files Here or Click to Upload**

Logo button. **Note:** If an image is added, it is auto-saved and cannot be deleted. You can, however, update the image/logo at any time.

Allowed file types for image upload are as follows: JPEG, JPG, PNG

[<<< Previous: Managing Workflow Approvals](#)

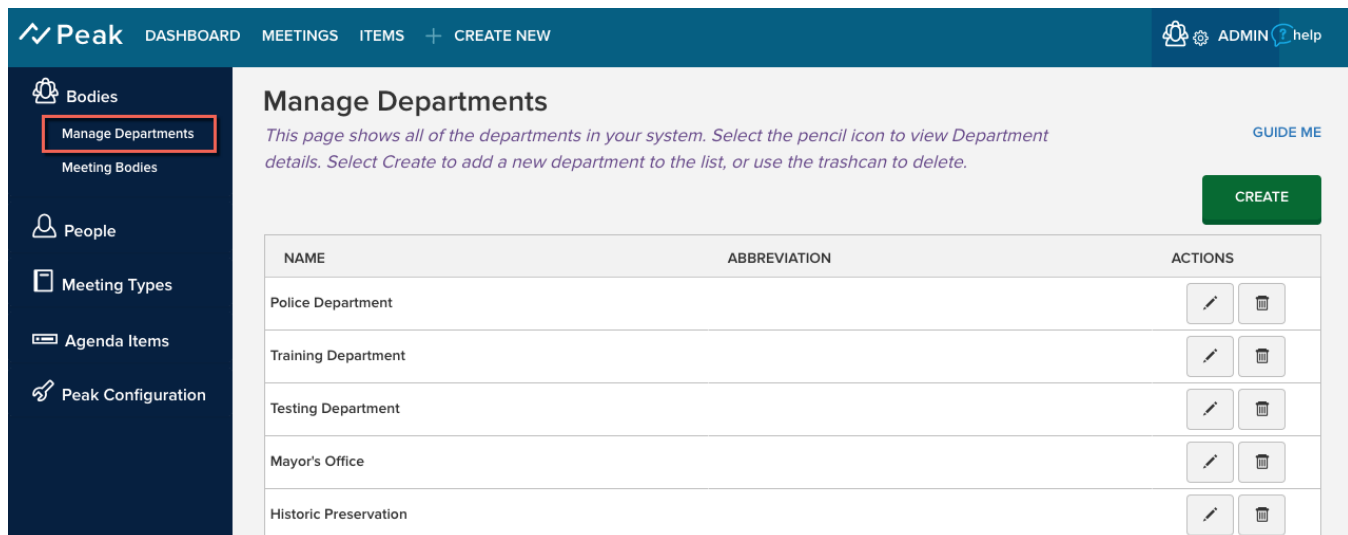
[>>> Next: Site-wide Settings](#)

[Return to Peak help topics](#)

Creating Departments in Peak

Departments in Peak are used to track from where agenda items are submitted in the agenda process. The **Manage Departments** page displays existing departments set up in Peak.

To work with departments, click **Admin** in the upper right-hand corner. Choose **Bodies** from the menu on the left, then select **Manage Departments**. Note: Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Manage Departments

This page shows all of the departments in your system. Select the pencil icon to view Department details. Select Create to add a new department to the list, or use the trashcan to delete.

[GUIDE ME](#)

[CREATE](#)

NAME	ABBREVIATION	ACTIONS
Police Department		 
Training Department		 
Testing Department		 
Mayor's Office		 
Historic Preservation		 

From here, you can edit, delete, or create departments.



To edit a department's details, click the **pencil** icon.



To delete a department, click the **trash can**.



To create a new department, click the **Create** button.

The **Create** button will take you to the Department Details page. A list of existing departments appears on the left. To search for a specific department, enter the name in the **Search** field. To edit a department's details, click the name of any department in the list. To create a department from scratch, enter the details in the fields on the right side of the screen.

Search

Peak Team Department

Planning and Zoning

Public Works

Training Team

You can add a new department here.

Create

Name *

This is a required field

Abbreviation

Description

Contact

Please select a contact person

▼

CANCEL

SAVE

Enter details for the new department. **Name** is the only required field:

Field	Action
Name	Click within the field, then enter the name of this department.
Abbreviation	Click within the field, then enter an abbreviation.
Description	Click within the field, then enter a short description of the department.
Contact	If you want to designate a contact person* for the department, select a name from the drop-down menu.

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14

*This list is populated by the [People records in Peak](#), which includes pre-existing applicant and people records from the Boards & Commissions application as well as records set up in Peak. You can also leave this field blank and add a contact name later by editing the department's details.

Click **Save** at the bottom right to save the new department to the system. The department now displays in the list.

[<<< Previous: Navigating Peak](#)

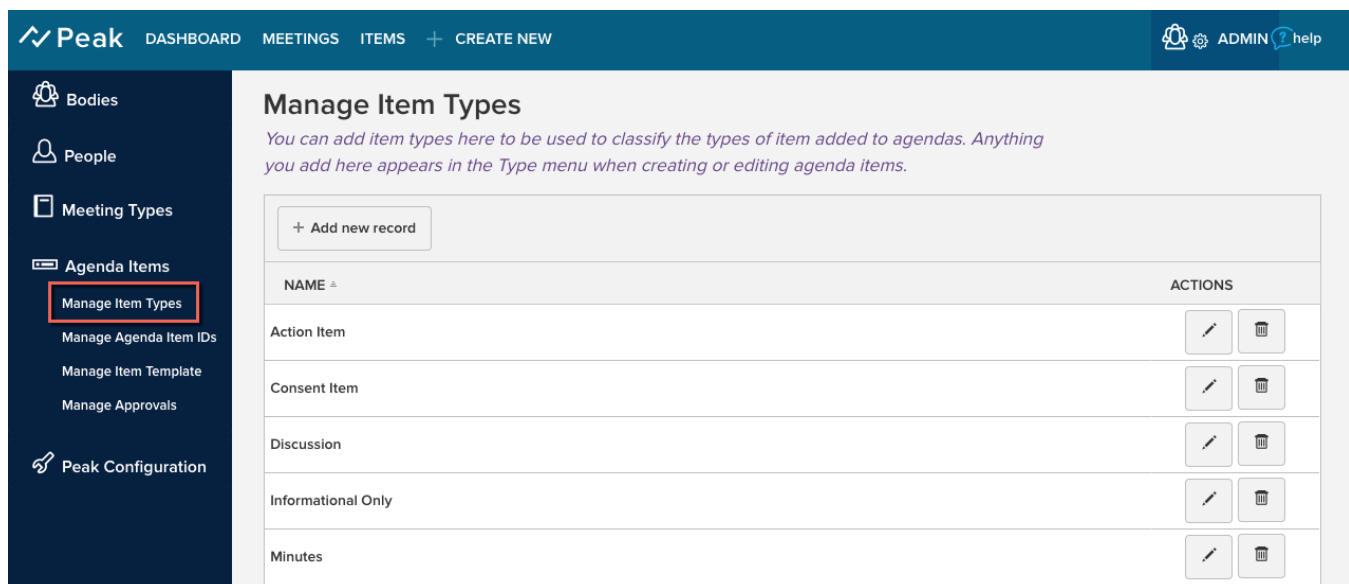
[>>> Next: Creating Meeting Bodies](#)

[Return to Peak help topics](#)

Creating Item Types in Peak

The Manage Item Types page enables you to create and manage agenda item types. You can create as many different types as you need.

You will use item types to categorize the agenda items you create. To work with item types, click **Admin** in the upper right-hand corner. Choose **Agenda Items** from the menu on the left, then select **Manage Item Types**. Note: Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Manage Item Types

You can add item types here to be used to classify the types of item added to agendas. Anything you add here appears in the Type menu when creating or editing agenda items.

+ Add new record

NAME ^	ACTIONS
Action Item	 
Consent Item	 
Discussion	 
Informational Only	 
Minutes	 

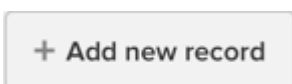
From here, you can edit, delete, and create new item types.



To edit an item type, click the **pencil** icon.



To delete an item type, click the **trash can**.



To create a new item type, click the **Add new record** button.

When you click Add new record or the **pencil** icon, you will get a field in which you can enter or edit the item type's name.

+ Add new record

NAME	ACTIONS
	✓ Update ⌂ Cancel

Click the blue **Update** button to save your new item type or the changes you have made.

Note: You will not be able to delete an item type that is in use by even one agenda item in the system. You can see a list of all items using a given agenda item type on the Items page; all of these items must be changed to another agenda item type before the original item type can be deleted.

<<< Previous: Creating Meeting Statuses

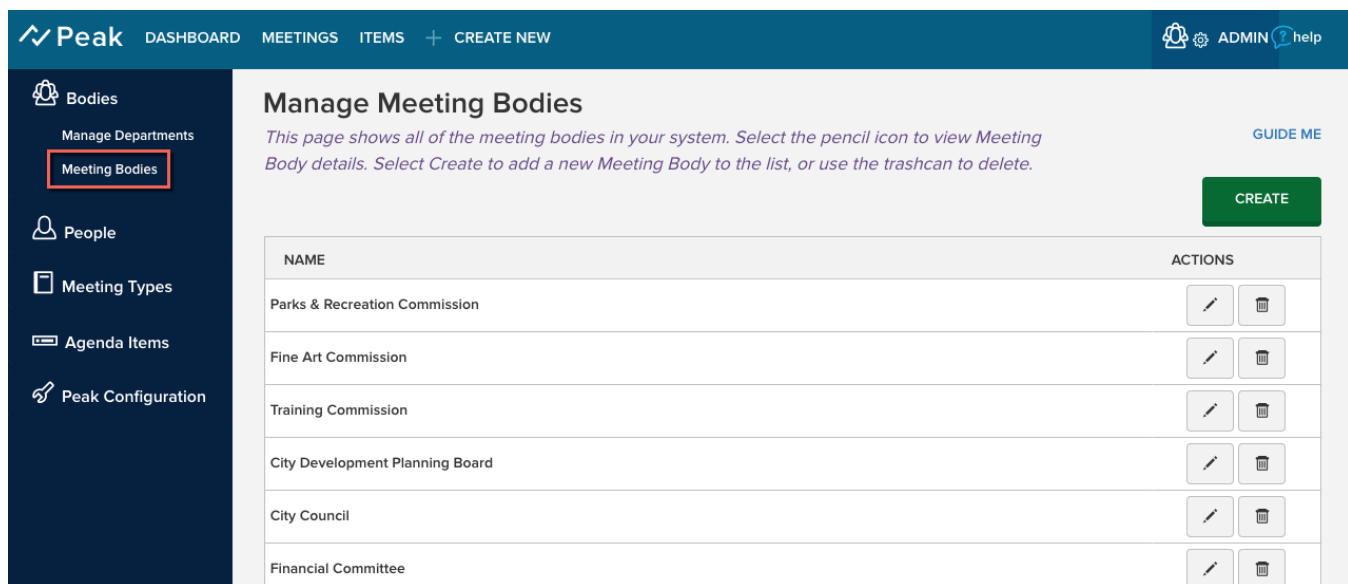
>>> Next: Customizing Agenda Item IDs

[Return to Peak help topics](#)

Creating Meeting Bodies in Peak

Meeting Bodies in Peak are the groups of elected or appointed officials that conduct public and non-public meetings. The Manage Meeting Bodies page displays existing meeting bodies set up in Peak.

To work with meeting bodies, click **Admin** in the upper right-hand corner. Choose **Bodies** from the menu on the left, then select **Manage Meeting Bodies**. Note: Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Peak DASHBOARD MEETINGS ITEMS + CREATE NEW ADMIN help

Bodies

- Manage Departments
- Meeting Bodies**
- People
- Meeting Types
- Agenda Items
- Peak Configuration

Manage Meeting Bodies

This page shows all of the meeting bodies in your system. Select the pencil icon to view Meeting Body details. Select Create to add a new Meeting Body to the list, or use the trashcan to delete.

[GUIDE ME](#)

CREATE

NAME	ACTIONS
Parks & Recreation Commission	 
Fine Art Commission	 
Training Commission	 
City Development Planning Board	 
City Council	 
Financial Committee	 

From here, you can edit, delete, or create meeting bodies.



To edit a meeting body's details, click the **pencil** icon.



To delete a meeting body, click the **trash can**.*



To create a new meeting body, click the **Create** button.

The **Create** button will take you to the Meeting Bodies Details page. A list of existing meeting bodies appears on the left. To search for a meeting body, enter the name in the **Search** field. To edit a meeting body's details, click the name of any meeting body in the list. To create a new meeting body, enter the details in the fields on the right side of the screen. **Meeting Name** is a required field:

Manage Meeting Bodies

Search

City Council

City Development Planning Board

City Event Commission

Civil Service Board

Election Commission

Financial Committee

Fine Art Commission

Historic Preservation Commission

License and Variance Board

Parks & Recreation Commission

Planning Commission

Public Art Commission

Small Business Council

Training Commission

You can add a new meeting body here.

Creating

Meeting Body Name *

Please enter a Meeting Body Name

This is a required field

Abbreviation

Default Meeting Type

Please select a meeting type

Default Meeting Location

Default Meeting Location

Default Meeting Time

5:30 PM

Contact Person

Please select a contact person

Description

CANCEL

SAVE

Enter details for the new meeting body:

Field	Description
Meeting Body Name	Click the field, then enter the name of the meeting body.
Abbreviation	Click the field, then enter an abbreviation.
Default Meeting Type	Choose a meeting type from the drop-down menu. Read more about creating and managing meeting types.

Default Meeting Location	Click the field, then enter the name of the room or chambers where this body will typically meet. This can be changed for individual meetings as needed. This field can contain multiple lines and has a one-thousand-character limit.
Default Meeting Time	Click the clock () and select a time. You can also type directly in the Default Meeting Time field. This is set up as a 12-hour clock; be sure to use the format H:MM AM/PM for single-digit hours and HH:MM AM/PM for double-digit hours, leaving a space between the minutes and AM/PM designation.
Contact Person	If you want to designate a contact person* for the meeting body, select a name from the drop-down menu. *This list is populated by the People records in Peak, which includes pre-existing applicant and people records from the Boards & Commissions application as well as records set up in Peak. You can also leave this field blank and add a contact name later by editing the department's details.
Description	Click the field, then enter a short description of this meeting body.
Member Size	Click the arrows to increase or decrease the number of members for this body. You can also type directly in the Member Size field.
Color Palette	Click on any color to associate it with the meeting body. Meetings for this body will show up on the calendar in this color, helping you quickly identify them. If a color is not selected for a body, any meeting created for it will default to gray on the calendar.

Click **Save** at the bottom right to save the new meeting body to the system. The meeting body now displays in the list.

Note

Peak meeting bodies are saved behind the scenes as boards in Granicus's Boards & Commissions application. When attempting to delete a meeting body from Peak, you'll be prompted to confirm or cancel the deletion. This helps to prevent deletion of corresponding boards in Boards & Commissions. In addition, deleting a meeting body from Peak is not allowed if the meeting body has been used for any meetings in the system.



Warning: If you have the Boards and Commissions application, deleting this meeting body in Peak will delete it in both applications. Are you sure you want to delete this meeting body?

YES, DELETE

NO, CANCEL

[<<< Previous: Creating Departments](#)

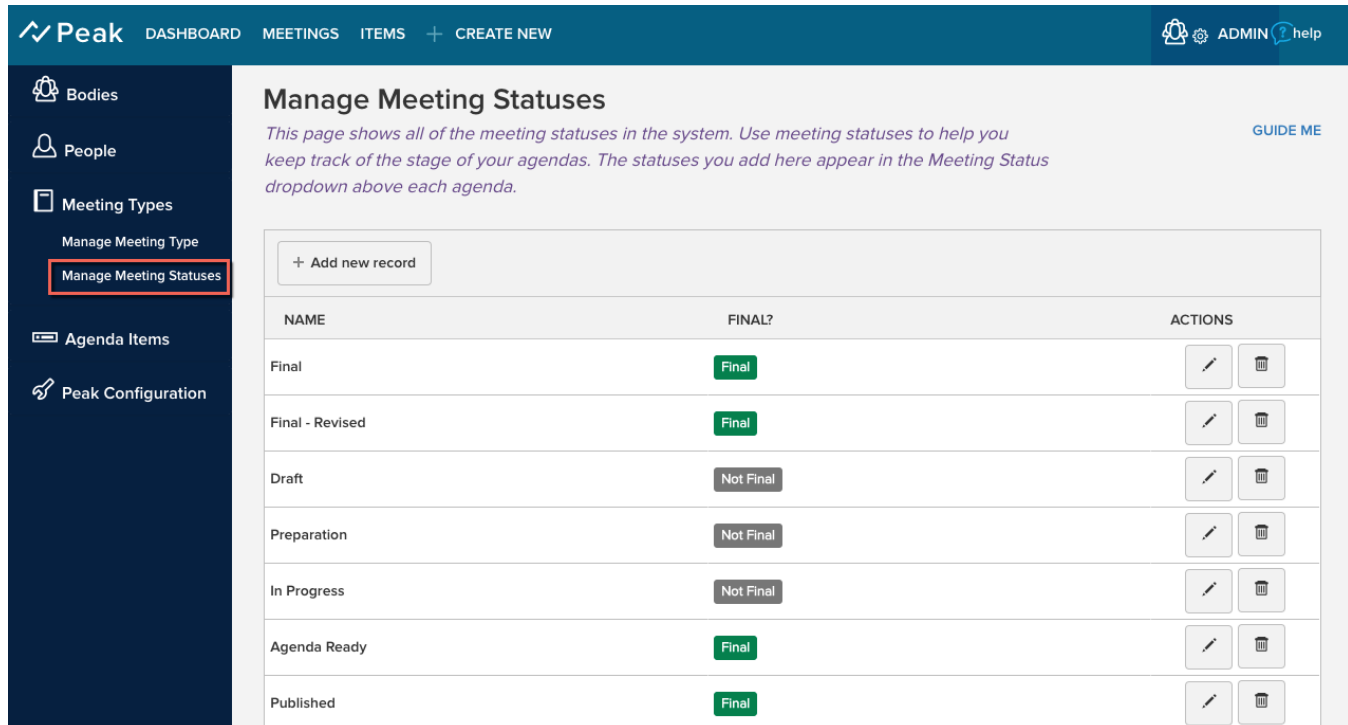
[>>> Next: Creating People](#)

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Creating Meeting Statuses in Peak

The Manage Meeting Statuses page is where you create and manage the statuses that get assigned to agendas. You'll be able to select and apply these statuses to the agendas, and they will also display on the meeting cards on the left side of the [Meetings page](#). You can use statuses to [control who can view](#) agendas.

To work with meeting statuses, click **Admin** in the upper right. Select **Meeting Types** from the menu on the left, then choose **Manage Meeting Statuses**. Note: Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Manage Meeting Statuses

This page shows all of the meeting statuses in the system. Use meeting statuses to help you keep track of the stage of your agendas. The statuses you add here appear in the Meeting Status dropdown above each agenda.

[GUIDE ME](#)

[+ Add new record](#)

NAME	FINAL?	ACTIONS
Final	Final	 
Final - Revised	Final	 
Draft	Not Final	 
Preparation	Not Final	 
In Progress	Not Final	 
Agenda Ready	Final	 
Published	Final	 

The status of the agenda determines who has access to view it. If an agenda is in not-final status, only Agenda Coordinators and Peak Admins can view it, while Drafters cannot. If the agenda is final, Drafters can view it as well.



To edit a status, click the **pencil** icon.



To delete a status, click the **trash can**.

+ Add new record

To create a new status, click the **Add new record** button.

Click the **Name** field and type a name for the new status. If you want the status to be in the Final category, select the checkbox to the right of the name.

+ Add new record

NAME	FINAL?	ACTIONS
Final - Revised	☐	✓ Update ⌛ Cancel
Final	Final	
Published	Final	
Draft	Not Final	

Click the blue **Update** button to save your new status, or click **Cancel** to discard it.

[<<< Previous: Creating Meeting Types](#)

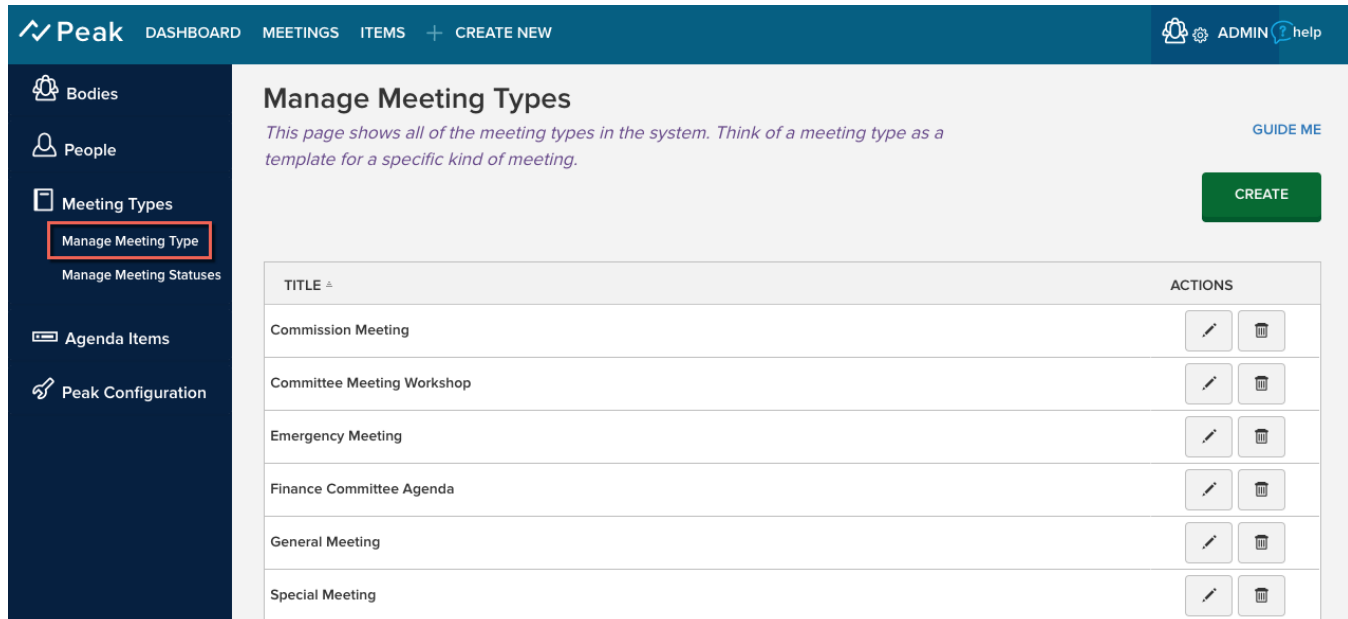
[>>> Next: Creating Item Types](#)

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Creating Meeting Types in Peak

Meeting types in Peak function as templates for specific types of meetings. They store agenda outlines for different meetings. For example, a regular meeting may have a different agenda outline than a special or workshop meeting; a committee meeting might have a different agenda outline than a council meeting.

To work with meeting types, click **Admin** in the upper right-hand corner. Choose **Meeting Types** from the menu on the left, then select **Manage Meeting Types**. Note: Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Manage Meeting Types

This page shows all of the meeting types in the system. Think of a meeting type as a template for a specific kind of meeting.

[GUIDE ME](#)

[CREATE](#)

TITLE ^	ACTIONS
Commission Meeting	 
Committee Meeting Workshop	 
Emergency Meeting	 
Finance Committee Agenda	 
General Meeting	 
Special Meeting	 

From here, you can edit, delete, or create meeting types.



To edit a meeting type, click the **pencil** icon.



To delete a meeting type, click the **trash can**.



To create a new meeting type, click the **Create** button.

The **Create** button will take you to the meeting type detail page, where you can create as many different meeting types as you need. A list of existing types appears on the left. To search for a specific meeting type, enter the name in the **Search** field. To view or edit details of an existing meeting type, click its name in the list at the left.

Manage Meeting Types

Meeting types enable you to configure settings for agendas of a specific type (e.g., regular session versus working session).

Search

Commission Meeting

Committee Meeting Workshop

Emergency Meeting

Finance Committee Agenda

General Meeting

Special Meeting

Year End Meeting

Create

Title *

Archive Folder *

Please select an Archive Folder

This is a required field

Choose the folder into which Peak should archive recordings for this Meeting Type.

Agenda Template

Please select an Agenda Template

Choose the agenda template for this Meeting Type.

ADD SECTION

Numbering Scheme

-

Enter details for the new meeting type:

Field	Action
Title	Click the field, then enter the meeting type name.
Archive Folder	This drop-down menu is populated with archive folders from the Granicus platform (MediaManager). Click the menu, then choose the folder into which Peak should store archives created with MediaManager or LiveManager for this meeting type. The archive folder is a required field and can be changed at any time; however, only those meetings that have not yet occurred will use the newly assigned archive folder. Archives created from past meetings will remain in the folder that was in place before the change was made.

Agenda Template	You have the option of requesting multiple custom agenda templates. This enables you to have customized format and logo for as many meeting bodies as you need. Any report set up by Granicus will populate this drop-down menu. The agenda report template assigned here will be the default for any meeting using said meeting type. If you leave this field blank, meetings created with this meeting type will use the site's default agenda report template. Contact Customer Care to request your customized report templates.
Add Section	Click the Add Section button to bring up the Add Section modal (see below).
Section Title	Click the Title field and enter a name for this section of the meeting's agenda.
Standard Text	Click the field, then enter standard text for this section.
Numbered	Click the checkbox if you want this section and its associated agenda items to be part of the numbering scheme.
Numbering Scheme	Use the drop-down menu to select a numbering scheme for your meeting type, e.g., 1.a, 1.b, 2.a., 2.b., etc.

After you click **Add Section**, you'll enter a title in the **Title** field and any applicable standard text in the **Standard Text** field. Choose whether you want the new section to be part of the numbering scheme by checking or deselecting the **Numbered?** checkbox.

Create Regular Meeting

Title *

Regular Meeting

Archive Folder *

City Council

Choose the folder into which Peak should archive recordings for this Meeting Type.

Agenda Template

Default template

Choose the agenda template for this Meeting Type.

ADD SECTION

Numbering Scheme

-

Title

Invocation

Standard Text

☒ Numbered?

CANCEL

SAVE

Click **Save** to save the new sections of your meeting. Now, you can edit, delete, and rearrange the order of the sections. Use the **pencil** to edit, the **trash can** to delete, and the **handles** to rearrange sections. For example, in the below figure, an Old Business section has been added and is currently section 6. Click and hold the **move** icon, and drag the section to a new location:

1	Invocation	  
2	Roll Call	  
3	New Business	  
4	Committee Reports	  
5	Adjournment	  
6	Old Business	  

The following figure shows the new location of the section. The sections have been automatically renumbered:

1	Invocation	  
2	Roll Call	  
3	New Business	  
4	Old Business	  
5	Committee Reports	  
6	Adjournment	  

Click the large **Save** button at the bottom right when you are finished adding, editing, and moving the sections. Your new template displays in the list.

Note: These changes will apply to any new meetings created using this template; meetings previously created with this type will remain as they were and are unaffected by the changes.

Editing a Meeting Type

When you make changes to a section or sections on a meeting type that's being used on scheduled meetings, there are a few things to keep in mind:

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

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

[<<< Previous: Assigning Group Roles](#)

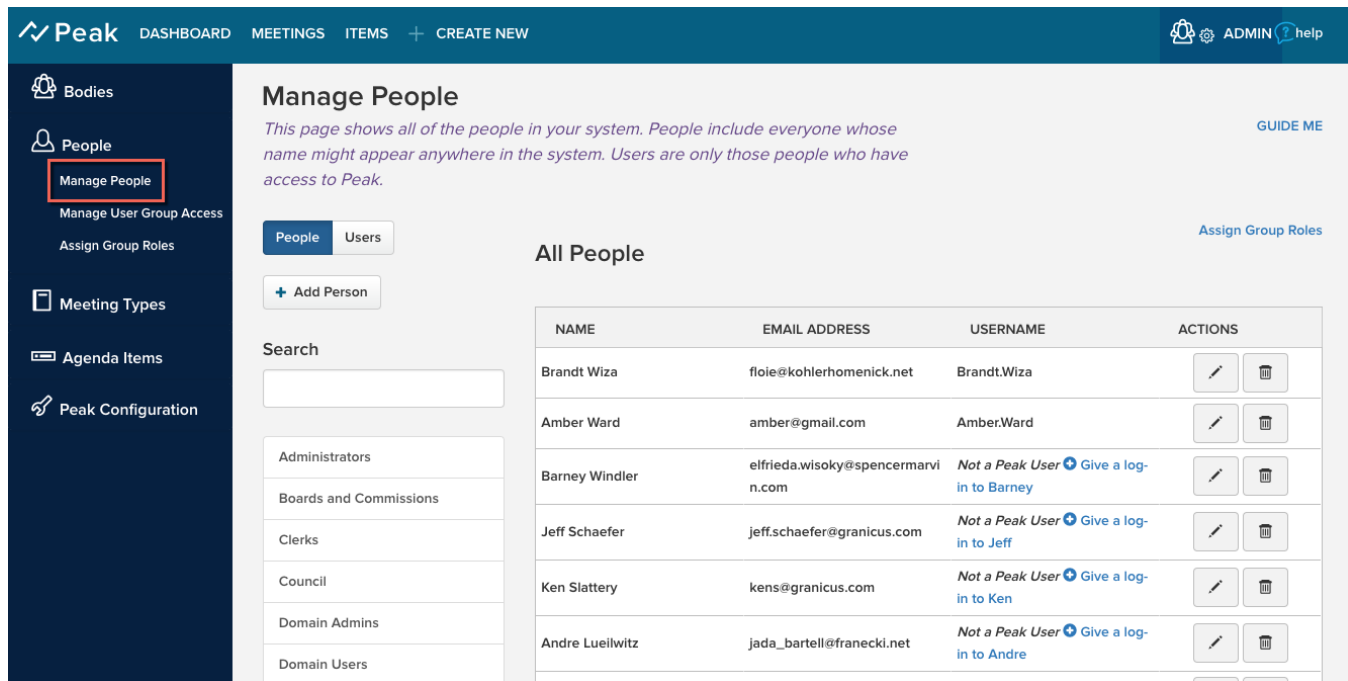
[>>> Next: Creating Meeting Statuses](#)

[Return to Peak help topics](#)

Creating People in Peak

The People section is where you will manage your Peak users and their roles/permissions. The Manage People page will display a list of all the people in your system and identify whether they have Peak user accounts. If your jurisdiction has [Boards and Commissions](#), your **People** list will pull from there.

To work with people, click **Admin** in the upper right-hand corner. Choose **People** from the menu on the left, then select **Manage People**. **Note:** Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Manage People

This page shows all of the people in your system. People include everyone whose name might appear anywhere in the system. Users are only those people who have access to Peak.

[GUIDE ME](#)

[Assign Group Roles](#)

People **Users**

[+ Add Person](#)

All People

NAME	EMAIL ADDRESS	USERNAME	ACTIONS
Brandt Wiza	floie@kohlerhomenick.net	Brandt.Wiza	 
Amber Ward	amber@gmail.com	Amber.Ward	 
Barney Windler	elfrieda.wisoky@spencermarvin.com	Not a Peak User Give a login to Barney	 
Jeff Schaefer	jeff.schaefer@granicus.com	Not a Peak User Give a login to Jeff	 
Ken Slattery	kens@granicus.com	Not a Peak User Give a login to Ken	 
Andre Lueilwitz	jada_bartell@franecki.net	Not a Peak User Give a login to Andre	 

From here, you can edit, delete, or add people.



To edit a person's details, click the **pencil** icon.



To delete a person, click the **trash can**.



To add a new person, click the **Add Person** button in the upper left of the screen.

Only a platform administrator can create user accounts. To create a user account for a given person, click **Give a log-in to . . .** next to that name.



The **Roles** menu enables you to [assign a role](#). Select a role from the menu, then click **Generate Log-In**.

Make Amber Ward a user. ✕

Warning: name will become a user for the whole Granicus Platform. You can edit [users](#) and [groups](#) in the Granicus Platform.

Title	Email Address	Department
Accounts Receivable	amber@gmail.com	Finance
Roles Assign Role (Optional) ▾		

GENERATE LOG-IN

Clicking **Generate Log-In** creates a user login for the person record, and [Peak will send an email](#) to the address entered in the **Email Address** field for the person record. The email contains the following:

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

If the Peak user login or password needs to change at any point, a platform administrator can take that action at the platform level using the *Users and Groups* menu option on the **Apps** drop-down menu.

Click the **Users** tab at the upper left to view only those individuals who have Peak user accounts. The All Users view contains a list of all users imported from the Granicus Platform, as well as any new users created via this procedure within Peak:

Manage People

This page shows all of the users with an account in Peak. Click the pencil icon to change a user's role in the system.

People

Users

+ Add Person

Search

Administrators

All Users

NAME	USER NAME
Elizabeth Warriner	Elizabeth.War
Granicus Anonymous	anonymous
Granicus Support	legistar
Shawn Beason	Shawn

From this page, you can view and change users' roles, and add people.

Peak

DASHBOARD MEETINGS ITEMS + CREATE NEW

ADMIN ? help

Bodies

People

Manage People

Assign Group Roles

Meeting Types

Agenda Items

Peak Configuration

Manage People

This page shows all of the users with an account in Peak. Click the pencil icon to change a user's role in the system.

GUIDE ME

Assign Group Roles

People

Users

+ Add Person

Search

Administrators

Boards and Commissions

Clerks

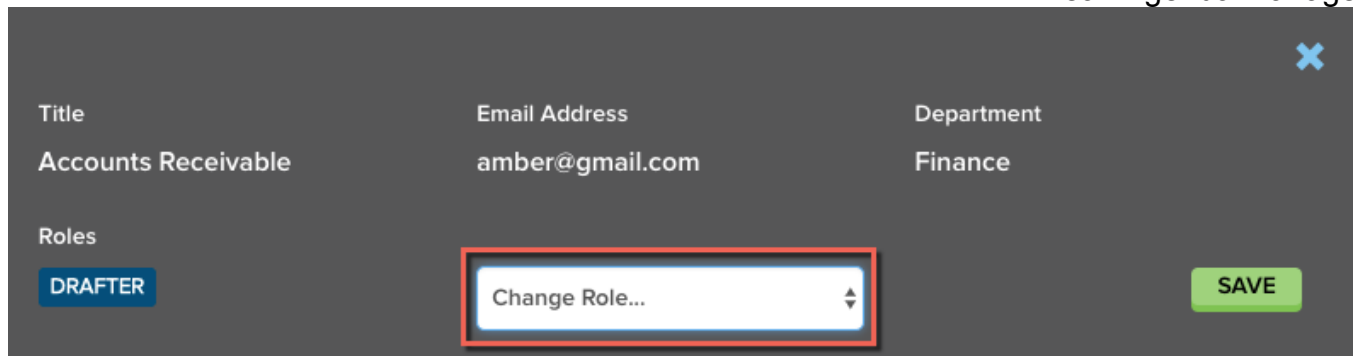
Council

Domain Admins

All Users

NAME	USER NAME	ROLES
Elizabeth Warriner	Elizabeth.Warriner	DRAFTER
Granicus Anonymous	anonymous	ADMIN
Granicus Support	legistar	ADMIN
Shawn Beason	Shawn	ADMIN
Js one	Jsone	NONE
Js two	Jstwo	NONE
Ashly Skiles	Ashly.Skiles	DRAFTER
Luke Danes	Idanes	NONE
Jane Smith	Jane.Smith	COORDINATOR

To change a user's role, click the **Pencil** icon next to the role label. A detail frame will appear, as shown below. Choose a new role from the drop-down menu. Click the green **Save** button at the lower right to save changes for this user. Please note that this modal will change a user's individual role, which overrides any [group role](#) the user may have been assigned.



Title	Email Address	Department
Accounts Receivable	amber@gmail.com	Finance
Roles		
DRAFTER	Change Role...	SAVE

To add a new person, click the **Add Person** button at the upper left on the Users page. This will take you to the Create a New Person form:



Upload/Change

Name

Prefix

First Name

This is a required field

M.I.

Last Name

This is a required field

Suffix

Title

Department

▼

User

Select a user to associate with this person

▼

Contact

Email Address

This is a required field

Primary Phone

Fax

Address

Address Line 1

Address Line 2

City

State

▼

Zip

Notes

Fill in the details for your new person. **First Name**, **Last Name**, and **Email Address** are required fields:

Field	Action
Avatar	Click Upload/Change below the green circle to add a photo that will be associated with this account. An avatar is not required, and if no photo is uploaded, a colored head-

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239
35

and-shoulders icon, along with the name, will be used on the [dashboard](#) and in [approval workflows](#).

*Please note: once added, an avatar cannot be deleted; it can only be updated with a new photo.

Name	Click each field to add a prefix, first name, middle initial, last name, and suffix as needed.
Title	Click the field, then add the title.
Department	Use the drop-down menu to select which department the person belongs to. The list is populated with the departments set up in Peak . If you do not yet have departments set up, you can go back later to add one by editing the person/user.
User	You can assign an existing Peak user to your person record. This is useful for users that were imported from your Granicus platform and do not have associated people records. Click the User drop-down menu and choose the user you want to link to this person.
Contact	Click within the fields, then enter email address (required), phone, and fax, if applicable. Be sure to enter a correctly formatted email address, as this is needed to create a user login. This email address will be used to send approval notification emails for any items this user is assigned in an approval workflow .
Address	Click within the fields, then enter address information for this person.
Notes	Click within the field, then enter any notes you wish to store for this person.

Click **Save** at the bottom right to save the new person record to the system. The record now displays in the list of all people.

[<<< Previous: Creating Meeting Bodies](#)

[>>> Next: User Roles](#)

[Return to Peak help topics](#)

Role Definitions in Peak

The following table shows the different levels of permissions for users of Peak Agenda Management:

Permission Level	Description
None	This role is limited to approving assigned agenda items, viewing the details and attachments associated with those items, viewing the Items page, and viewing the dashboard to see 1) the count of items awaiting approval and 2) upcoming meetings.
View Only	One step above the None role in that this user will have view-only access all Final-status agendas associated with their user group, and view-only access to all agendas not restricted to a group. No editing permissions.
Drafter	This role has the ability to create and manage everything related to agenda items and agenda item workflow. A Drafter can also view agendas, along with associated items and attachments, when those agendas have been assigned a Final status.
Agenda Coordinator	This role has all the permissions of the Drafter, plus the ability to create and manage meetings and agendas.
Peak Admin	This role has all the permissions of the Agenda Coordinator, with the addition of access to Peak Admin, which allows configuration and management of the application.
Platform Administrator	This role has the ability to manage users and groups in the Granicus Platform . It has all the privileges of a Peak Admin as well as the capability to create user logins for people records in Peak.

To learn how to add a user and set permissions for that user, see [Creating People in Peak](#). To learn about assigning roles to groups of users, see [Assigning Group Roles in Peak](#).

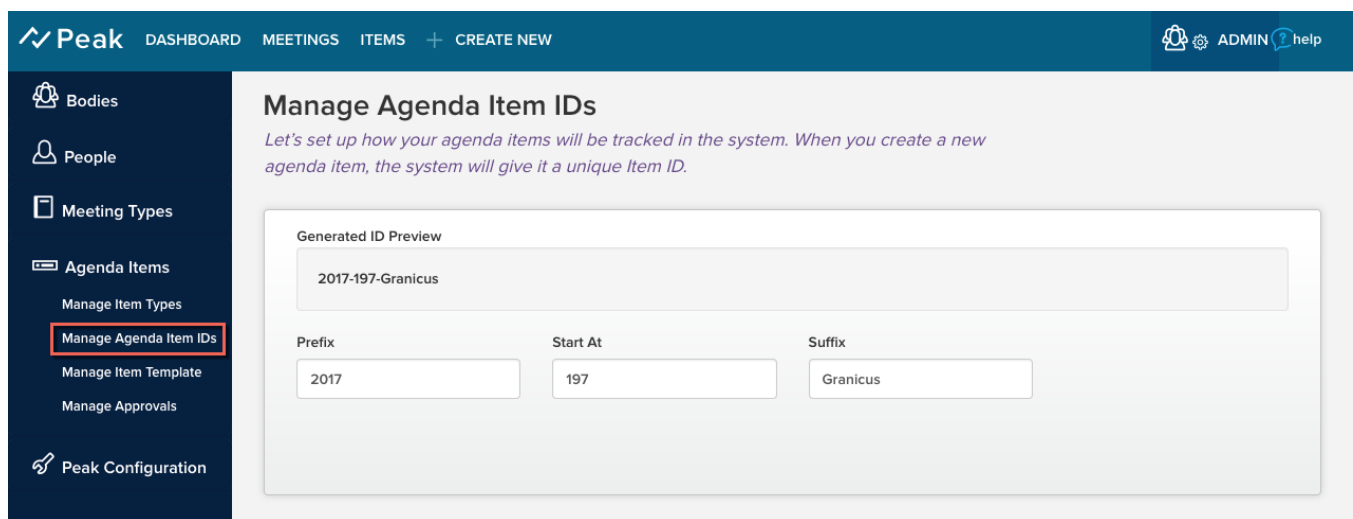
[<<< Previous: Creating People](#)

[>>> Next: Managing User Group Access](#)

[Return to Peak help topics](#)

Customizing Agenda Item IDs in Peak

The agenda item ID numbering system allows you to specify the numbering format used to automatically assign a unique tracking number to each of your agenda items. To set up your numbering system, click **Admin** in the upper right-hand corner of the Peak dashboard. Choose **Agenda Items** from the menu on the left, then select **Manage Agenda Item IDs**. Note: Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Enter the details of your numbering system:

Field	Description
Prefix	What you enter here will be the prefix added to the unique ID of each agenda item. You can use letters or numerals in this field.
Start At	This serves as a counter that will assign, in ascending order, a number to each agenda item as it is created. The counter will increase by one every time an agenda item is added. If you start the counter at 100, for example, the first agenda item will be 100; the following agenda item will be 101, and so on. Click the field and enter the number you wish to start with. The minimum number is 0

Field	Description
	(zero)—any non-negative integer can be used as the starting number.
Suffix	What you enter here will be the suffix added to the unique ID of each agenda item. You can use letters or numerals in this field.

The Generated ID Preview will show you what the next agenda item ID will look like and will update in real time as you type. Click the **Save** button to save your agenda item numbering system; it will not save automatically.

Note: If you [create a new version of an item](#), the various records of the item will share an agenda item ID. Duplicating the item, however, will result in a new ID being assigned.

[<<< Previous: Creating Item Types](#)

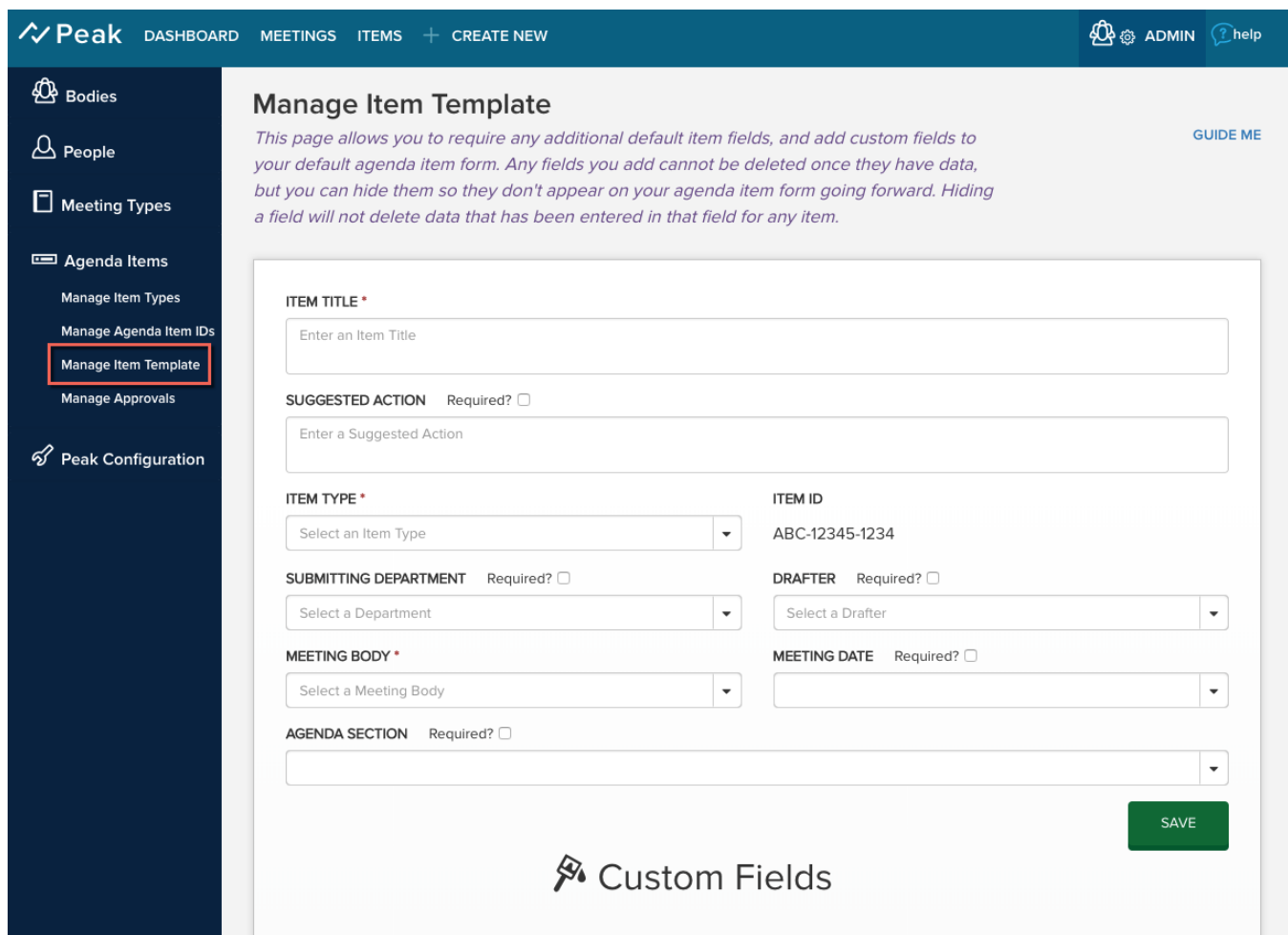
[>>> Next: Customizing the Item Template](#)

[Return to Peak help topics](#)

Customizing the Item Template in Peak

The Agenda Item Template page enables you to customize your default agenda item form. You can add custom fields to track data not otherwise available on the default form.

To work with the agenda item template, click **Admin** in the upper right-hand corner of the Peak dashboard. Choose **Agenda Items** from the menu on the left, then select **Manage Item Template**. **Note:** Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Peak DASHBOARD MEETINGS ITEMS + CREATE NEW ADMIN help

Manage Item Template [GUIDE ME](#)

This page allows you to require any additional default item fields, and add custom fields to your default agenda item form. Any fields you add cannot be deleted once they have data, but you can hide them so they don't appear on your agenda item form going forward. Hiding a field will not delete data that has been entered in that field for any item.

ITEM TITLE *

Enter an Item Title

SUGGESTED ACTION Required? ☐

Enter a Suggested Action

ITEM TYPE *

Select an Item Type

ITEM ID

ABC-12345-1234

SUBMITTING DEPARTMENT Required? ☐

Select a Department

DRAFTER Required? ☐

Select a Drafter

MEETING BODY *

Select a Meeting Body

MEETING DATE Required? ☐

AGENDA SECTION Required? ☐

SAVE

 Custom Fields

The fields shown on this page give you a preview of the form used to create agenda items. This is your default form.

Use the **Required** checkbox where available to make a field required, i.e., a user must fill it out in order to save an agenda item. You can make the following fields required: **Suggested Action**, **Submitting Department**, **Drafter**,

Meeting Date, and **Agenda Section**. The other fields (**Item Title**, **Item Type**, **Meeting Body**) are already required by the system; this cannot be changed.

Be sure to click the green **Save** button after you've made any changes to which fields are required.

Custom Fields

Click the green **Add Field** button to create a custom field:



As you fill in this form, the elements will show up in the **Preview** on the left half of the screen.

Preview

Customize

Name (Read-Only)

Type *

Text Field

Label *

This will show in bold above the control as a prompt for the user

This field is required

Placeholder

This text will be displayed until this field is filled out

255 characters left

☐ Required?

CANCEL

SAVE

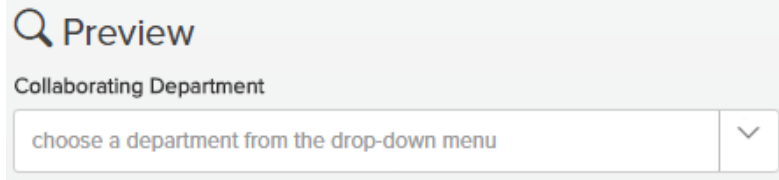
1. Choose a type from the **Type** drop-down menu. The available types are described in the table below.
2. Type a label in the **Label** field. This text will display above the control and will prompt the user's action.

- 3. Type placeholder text in the **Placeholder** field. This is the text that will display in gray in the template's field until it has been filled out. The **Preview** field on the left shows the appearance of your custom field.
- 4. Select whether the field will be required on the agenda template. If this is a required field, click the **Required** checkbox. A red asterisk appears next to a mandatory field or radio button.
- 5. Click **Save**.

Note: Do not enter any text in the **Name** field. This will auto-populate based on the Label give to the field.

The table below shows the different types of fields you can create using the **Type** drop-down menu.

Custom Field Type	Description
Text Field	This is a plain-text field supporting up to 255 characters that allows you to track text-based data: Preview Please provide a description of the agenda item: type your text here
Date Picker	This date field allows a calendar selection so you can track dates: Preview Deadline 12/31/2015
Meeting Body Combo Box	This option provides a drop-down selection of existing meeting bodies already set up in Peak. See Managing Meeting Bodies to add additional meeting bodies. Preview Coordinating Meeting Body choose a meeting body from the drop-down menu
Department Dropdown	This provides a drop-down selection of existing departments already set up in Peak. See Managing Departments to add additional departments.



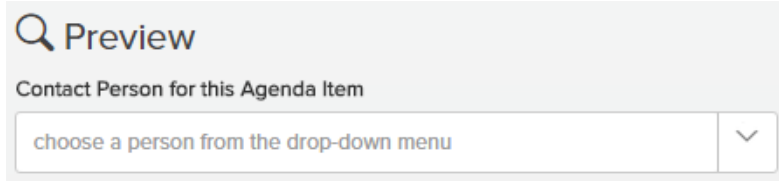
Preview

Collaborating Department

choose a department from the drop-down menu

Provides a drop-down selection of people in your system. See [Managing People](#) to add people and Peak users.

People Dropdown



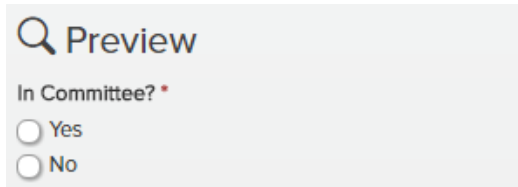
Preview

Contact Person for this Agenda Item

choose a person from the drop-down menu

This provides a Yes/No selection option. Please note the radio button becomes a required field on the template by default. Required fields are denoted by the red asterisk.

Radio (Yes/No)



Preview

In Committee? *

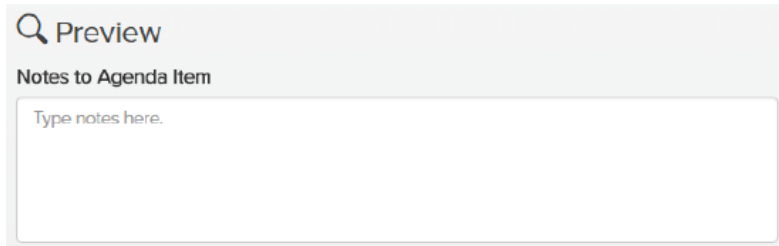
☐ Yes

☐ No

This option provides a multi-line plain text field that supports entries of up to 65,535 characters.

Note: White spacing and indents are not supported in this field. While it will display during editing, this formatting will not be retained once viewed in read-only mode or published.

Text Area



Preview

Notes to Agenda Item

Type notes here.

Custom Dropdown

This options gives you a drop-down menu that allows you to define what the menu options are. When you select Custom Dropdown, you can add the menu options using the **Option 1** field. Click **Add Another Option** to create additional menu selections. Each menu option can contain up to 1,000 characters.

Preview

This applies to the following counties:

Adams

Arapahoe

Douglas

Jefferson

Your fields show in a list beneath the **Custom Fields** heading.

Custom Fields

Public Hearing? *

☐ Yes

☐ No

Internal Notes Only:

Not public notes

Second Associated Department

Contact Person for this Item *

choose a person from the drop-down menu

In Committee? *

☐ Yes

☐ No

ADD FIELD

You can now edit, delete, or rearrange the order of the fields. Use the **pencil**



to edit, the **trash can**



to delete, and to reorder the fields, click and hold the **handles**



and drag the item to a new location in the list of fields. The new order will automatically save. Please note that any custom fields cannot be deleted once they have data entered on any agenda item. You can, however, hide custom fields on those items where they have not yet been populated with data and on any new item created.

To hide a custom field, click the **pencil** icon to edit the field. Then click the **Hidden?** checkbox on the bottom of the right side of the modal.

The screenshot shows a modal window with two panels. The left panel, titled 'Preview', displays a form with the question 'Going to Council? *' and two radio buttons labeled 'Yes' and 'No'. The right panel, titled 'Customize', contains configuration options for the field. It includes a 'Name' field with the value 'going_to_council' (239 characters left), a 'Type' dropdown menu set to 'Radio (Yes/No)', and a 'Label' field with the value 'Going to Council?' (238 characters left). At the bottom of the 'Customize' panel, there is a checkbox labeled 'Hidden?' which is circled in red. Below the 'Customize' panel are 'CANCEL' and 'SAVE' buttons.

Click the green **Save** button to save any edits you've made to the custom field.

Note: Custom fields set up here can be published to agenda reports and packets. Once you've created the desired custom fields, you can make a request with Customer Care for these fields to show up under the related item on the agenda report. A field will display only if there's data entered in it for a given agenda item. If you create additional fields after your request has been processed, you'll need to make an additional request to include the new custom fields on your reports. [Make your request here.](#)

[<<< Previous: Customizing Agenda Item IDs](#)

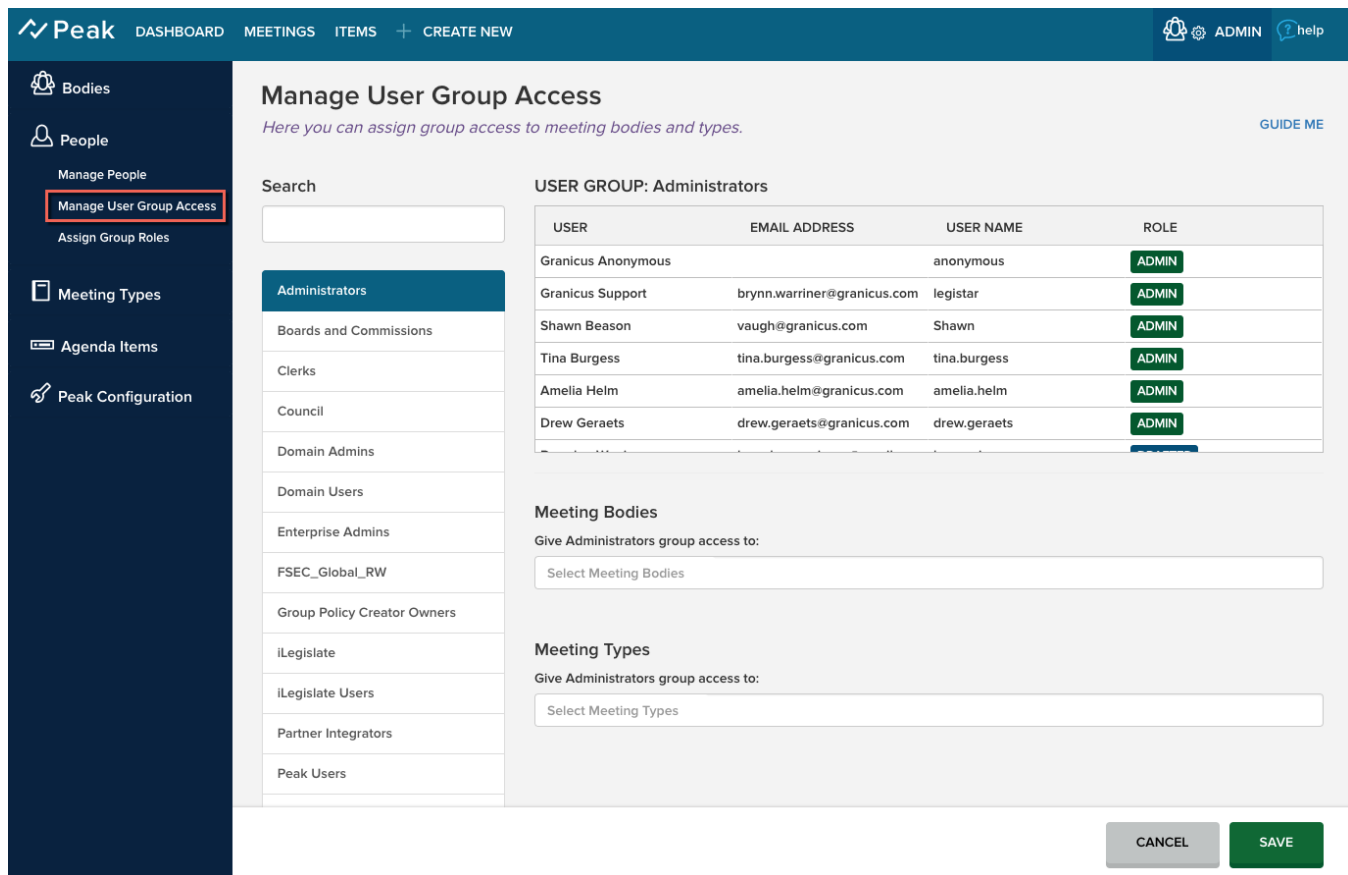
[>>> Next: Managing Workflow Approvals](#)

[Return to Peak help topics](#)

Managing User Group Access in Peak

The Manage User Group Access page enables Admins to control which groups of Agenda Coordinators have access to use each meeting type and body as they create meetings.

To work with user group access, click **Admin** in the upper right-hand corner. Choose **People** from the menu on the left, then select **Manage User Group Access**. **Note:** Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Manage User Group Access
Here you can assign group access to meeting bodies and types. [GUIDE ME](#)

Search

USER GROUP: Administrators

USER	EMAIL ADDRESS	USER NAME	ROLE
Granicus Anonymous		anonymous	ADMIN
Granicus Support	brynn.warriner@granicus.com	legistar	ADMIN
Shawn Beason	vaugh@granicus.com	Shawn	ADMIN
Tina Burgess	tina.burgess@granicus.com	tina.burgess	ADMIN
Amelia Helm	amelia.helm@granicus.com	amelia.helm	ADMIN
Drew Geraets	drew.geraets@granicus.com	drew.geraets	ADMIN

Meeting Bodies
Give Administrators group access to:
Select Meeting Bodies

Meeting Types
Give Administrators group access to:
Select Meeting Types

CANCEL **SAVE**

Once a user group is assigned to a meeting body or type, Agenda Coordinators belonging to the user group will have the usual permissions when creating meetings. Any meeting body or type that does not have a user group assigned to it will be available to all Agenda Coordinators.

From the list on the left of the form, select a user group. You can use the **Search** field at the upper left to quickly find a group. Once you click the group name, the group's members show up in a list on the right side of the page.

Click within the **Meeting Bodies** field to reveal a drop-down list of the meeting bodies set up in your Peak system. Choose one or more meeting bodies for this user group. As meeting bodies are selected, they'll display in the field. Click the **x** to remove any from selection.

Meeting Bodies

Give Boards and Commissions group access to:

City Council X

City Event Commission X

Board of Health

City Development Planning Board

Civil Service Commission

Election Commission

Financial Committee

Fine Art Commission

Repeat this process for **Meeting Types**.

Meeting Types

Give Boards and Commissions group access to:

Emergency Meeting X

General Meeting X

Commission Meeting

Committee Meeting Workshop

Finance Committee Agenda

Special Meeting

Year End Meeting

Click **Save** to apply these permissions.

Enhanced Security

You can further tighten permissions using the **Enhanced user group security** toggle on the [Site Settings](#) page. If this setting is enabled, agendas and their agenda items of meeting bodies and types will be hidden from users who are not part of a group assigned to them. Meetings are still visible on the dashboard and calendar for these users, but if they attempt to access the agenda (or meeting details, in case of an Agenda Coordinator), they will be denied. For agenda items, these users will not see those items on the Items page or in the list of unscheduled items when building an agenda using the **Add Item** button.

Effects on Other Users

The following applies to all users other than Admins (View Only, Drafter, Agenda Coordinator) for meeting bodies and types that they are not assigned to via a user group:

Agendas: Final agendas are available as read-only. If the user can view an agenda, all the items of the agenda can also be viewed in read-only mode, regardless of whether they are approved. However, if the **Enhanced user group security** toggle is set to **On**, the user cannot view these final agendas or items.

Meetings are still visible on the dashboard and calendar for these users, but if they try to access the agenda (or meeting details, in case of an Agenda Coordinator), they will be denied.

Items: Approved items will be available from the Items page in read-only mode (denoted by the **eye** icon). Non-approved items will not be visible from the Items page but can be viewed if part of an agenda that the user can view.

Note: Users involved in an approval workflow as approvers or FYI-only are unaffected by this feature.

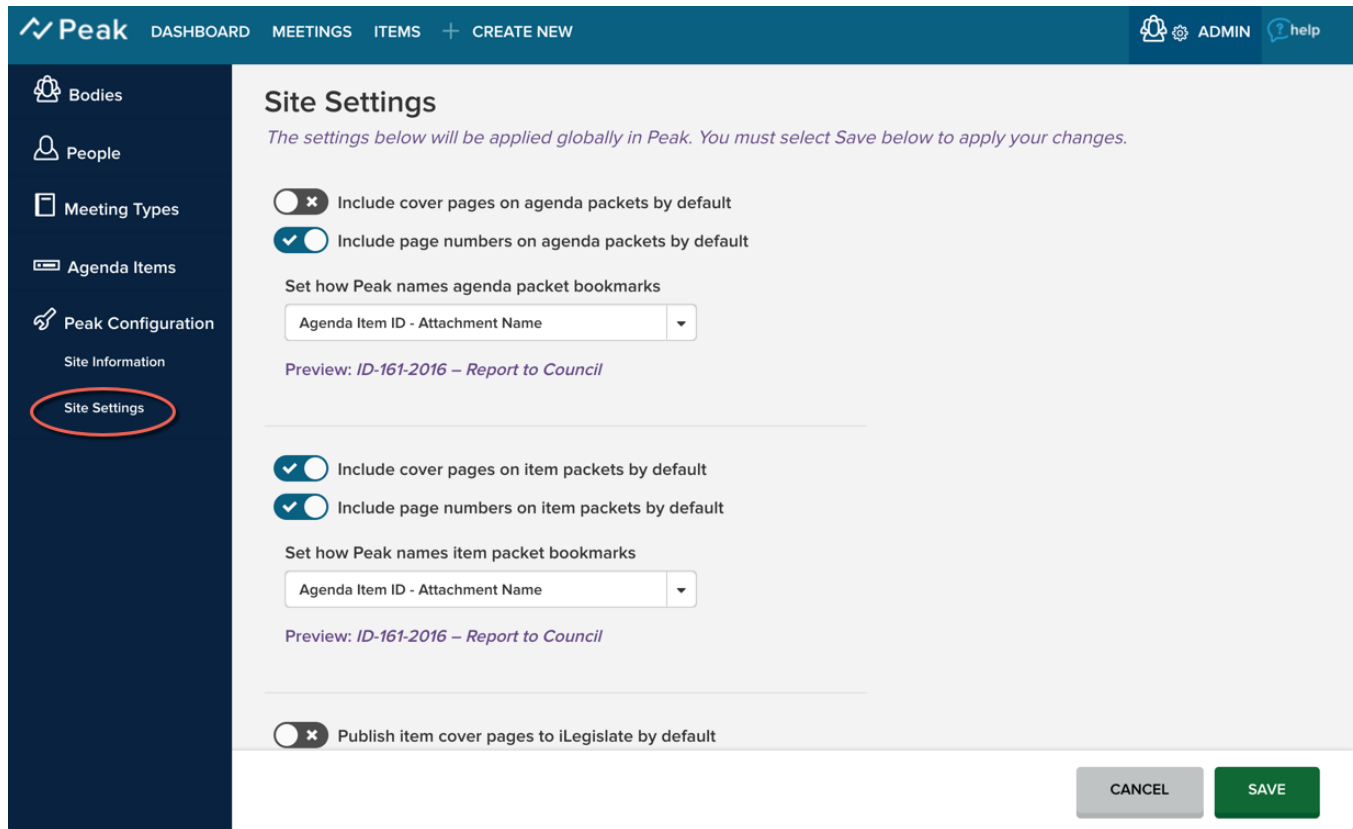
[<<< Previous: User Role Definitions](#)

[>>> Next: Assigning Group Roles](#)

[Return to Peak help topics](#)

Site-wide Settings in Peak

The Site Settings page in Admin enables you to configure site-wide settings for Peak. To work with settings, click **Admin** in the upper right-hand corner of the Peak dashboard. Choose **Peak Configuration** from the menu on the left, then select **Site Settings**. Note: Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



Peak DASHBOARD MEETINGS ITEMS + CREATE NEW ADMIN help

Bodies
People
Meeting Types
Agenda Items
Peak Configuration
Site Information
Site Settings

Site Settings

The settings below will be applied globally in Peak. You must select Save below to apply your changes.

☐ Include cover pages on agenda packets by default
☒ Include page numbers on agenda packets by default

Set how Peak names agenda packet bookmarks
 Agenda Item ID - Attachment Name
 Preview: ID-161-2016 – Report to Council

☒ Include cover pages on item packets by default
☒ Include page numbers on item packets by default

Set how Peak names item packet bookmarks
 Agenda Item ID - Attachment Name
 Preview: ID-161-2016 – Report to Council

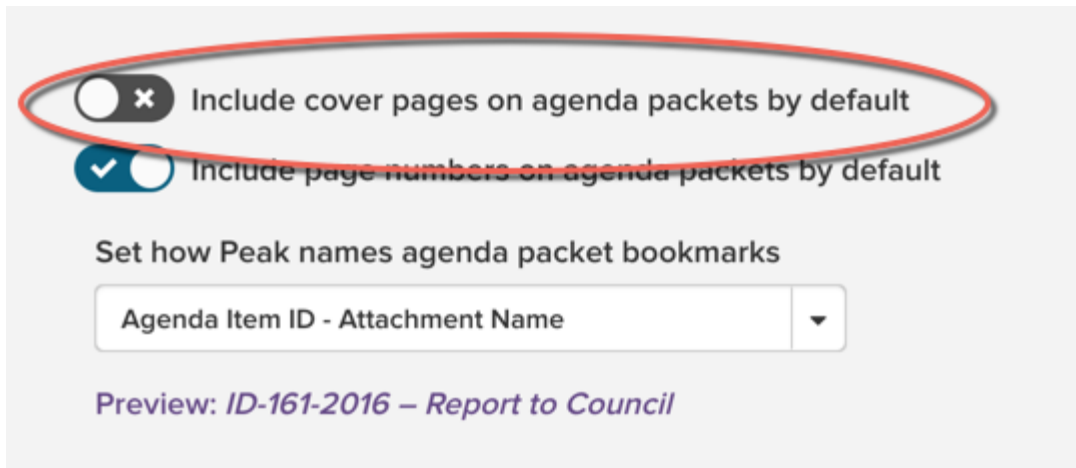
☐ Publish item cover pages to iLegislate by default

CANCEL SAVE

Agenda Packet Settings

Cover Pages

Use the **Include cover pages on agenda packets by default** toggle to determine the default cover page setting for downloading or publishing agenda packets from the Agenda Details page.



☐ x Include cover pages on agenda packets by default

☒ Include page numbers on agenda packets by default

Set how Peak names agenda packet bookmarks

Agenda Item ID - Attachment Name ▼

Preview: *ID-161-2016 – Report to Council*

If the toggle is set to **On**, indicated by the checkmark, the **Use Cover Pages** setting on the **Download** menu will be selected (illustrated below). If the toggle on this page is off, indicated by the **x**, the **Use Cover Pages** setting will be deselected. The setting is site-wide and applies to all meetings, but an Agenda Coordinator or Peak Admin can always change the checkbox on an individual agenda packet generation.

This setting does not affect the cover page setting at the item level. Scroll down for item packet settings.

DOWNLOAD **AUGUST 30, 2016 CITY EVENT COMMISSION**

AGENDA ONLY OR **AGENDA PACKET**

☒ **FOR PUBLIC** THIS WILL NOT INCLUDE ITEM ATTACHMENTS MARKED CONFIDENTIAL

☐ **FOR COUNCIL** THIS WILL INCLUDE ALL ATTACHMENTS

☒ **USE COVER PAGES**

PUBLIC PACKET HAS NOT BEEN GENERATED.

GENERATE PACKET

Packet has not been generated. Click the generate button to start.

DOWNLOAD **CANCEL**

If you elect to include cover pages, [agenda packets](#) will contain a cover page for each agenda item, preceding its attachments. The exception to this is agenda items for which cover pages have individually been marked as excluded via the [Agenda Item Details](#) page.

Be sure to click **Save** at the bottom right of the page to retain any settings you change.

Page Numbers

Use the **Include page numbers on agenda packets by default** toggle to determine whether agenda packets will contain page numbers when published. This toggle is on by default; turn it off to prevent page numbers from being added to agenda packets.

☐ ~~Include cover pages on agenda packets by default~~
☒ Include page numbers on agenda packets by default

Set how Peak names agenda packet bookmarks

Agenda Item ID - Attachment Name ▼

Preview: *ID-161-2016 – Report to Council*

Name Setting for Agenda Packet Bookmarks

You can also set a default naming convention for attachment and cover page bookmarks in agenda packets using the **Set how Peak names Agenda packet bookmarks** drop-down menu on this page.

The options for bookmarking attachments are as follows:

1. Agenda Item ID – Attachment Name (e.g., ID-161-2016 – Report to Council)
2. Item Agenda Number – Attachment Name (e.g., Item 7.1 – Report to Council)
3. Attachment Name (e.g., Report to Council)

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

Set how Peak names Agenda packet bookmarks

Agenda Item ID - Attachment Name ▼

Preview: *ID-161-2016 – Report to Council*

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

1. ID-161-2016 – Cover Page
2. Item 7.1 – Cover Page
3. Cover Page

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

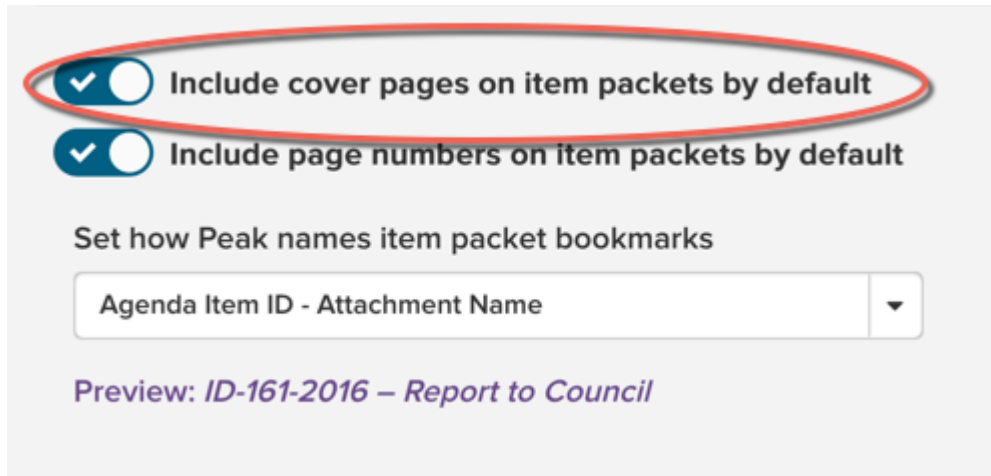
The bookmark will include the use of [custom numbering](#) on the agenda item if the *Item Agenda Number* option is selected. If the section to which the item belongs is unnumbered, bookmarks will contain only the attachment name (or "Cover Page").

After you have selected a bookmark naming convention from the drop-down menu, click **Save** at the bottom right to apply the setting to Peak.

Item Packet Settings

Cover Pages

Use the **Include cover pages on item packets by default** toggle to determine the default cover page setting for [generating item packets](#).



If the toggle is set to **On**, indicated by the checkmark, any new agenda items created will have the toggle set to on (cover pages included).

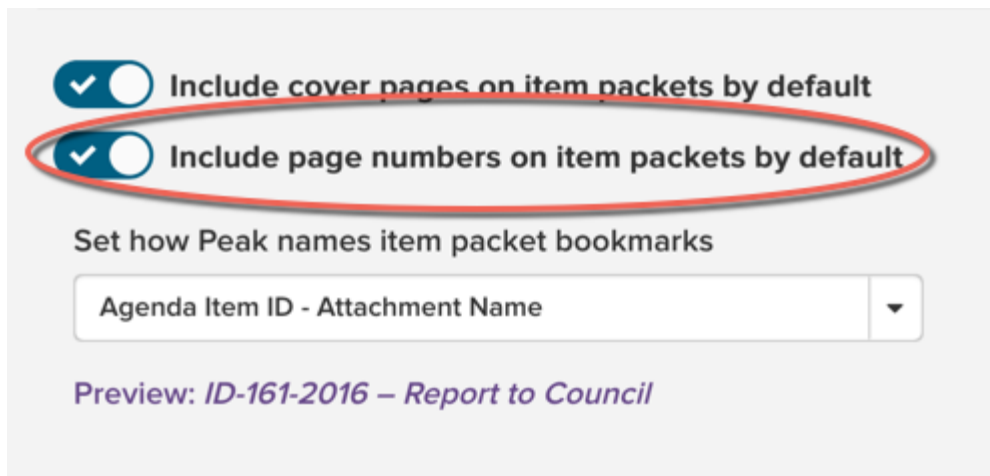
If set to off (cover pages excluded), any new agenda items created from that point forward will have the toggle set to exclude cover pages. Items created when the toggle was set to on will retain that setting unless changed.

The setting is site-wide and applies to all meetings, but a Drafter, Agenda Coordinator, or Peak Admin can always change the setting for individual items as appropriate using the left menu bar on the [Agenda Item Details page of any item](#).

Note: Creating a new version or a duplicate of an agenda item does not use this site setting toggle, but rather copies the setting of the source item.

Page Numbers

Use the **Include page numbers on agenda item packets by default** toggle to determine whether agenda packets will contain page numbers when published. This toggle is on by default; turn it off to prevent page numbers from being added to agenda packets.



☒ Include cover pages on item packets by default

☒ Include page numbers on item packets by default

Set how Peak names item packet bookmarks

Agenda Item ID - Attachment Name ▼

Preview: *ID-161-2016 – Report to Council*

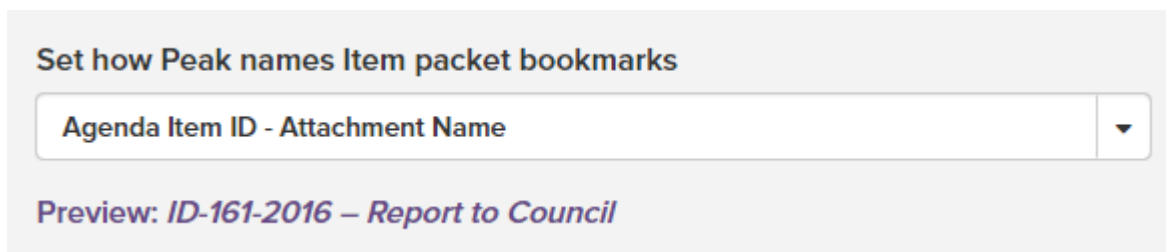
Name Setting for Item Packet Bookmarks

You can also set a default naming convention for attachment and cover page bookmarks in item packets using the **Set how Peak names item packet bookmarks** drop-down menu.

The options are as follows:

1. Agenda Item ID – Attachment Name (e.g., ID-161-2016 – Report to Council)
2. Attachment Name (e.g., Report to Council)

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



Set how Peak names item packet bookmarks

Agenda Item ID - Attachment Name ▼

Preview: *ID-161-2016 – Report to Council*

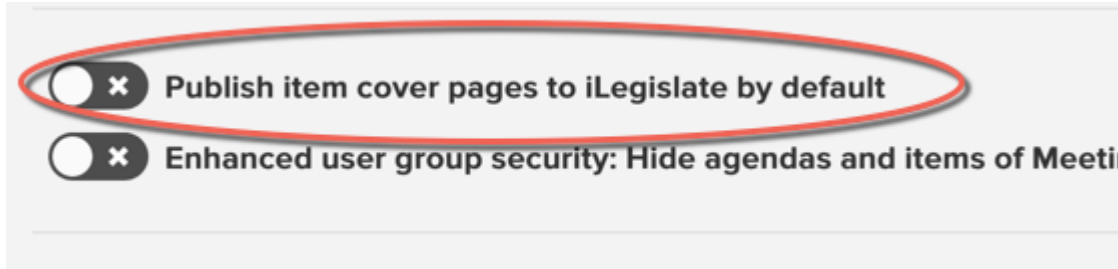
For the respective cover page link, examples are as follows:

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

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

Publish Item Cover Pages Setting

Use the **Publish item cover pages to iLegislate by default** toggle to determine whether cover pages should be included when [publishing agendas to the Granicus Platform and iLegislate](#).



This setting is defaulted to **No**, indicated by the x. When set to **No**, publishing does not distribute the cover page to the [Platform](#) or [iLegislate](#). If set to **Yes**, Cover Pages are published to iLegislate and the Granicus Platform for those agenda items that have **Cover Page Included** selected when the agenda is published ([see above](#)). When publishing to iLegislate or the Platform, the cover page will be listed as the first attachment for each agenda item viewable online and also on iLegislate. The name of the attachment will be "Cover Page."

For existing agenda items, turning on this site setting will not automatically update and add cover pages to all of the agendas on iLegislate. Agenda coordinators should download the agenda report as well as generate the agenda packet, then publish to iLegislate to update agendas.

Enhanced User Group Security Setting

The Enhanced user group security toggle enables you to set tighter user group security if desired. If this setting is enabled, agendas and their agenda items of meeting bodies and types will be hidden from users (other than Admins) who are not part of a group assigned to them via the [Manage User Group Access](#) page.

Meetings are still visible on the dashboard and calendar for these users, but if they try and access the agenda (or meeting details, in case of an Agenda Coordinator), they will be denied. For agenda items, these users will not see those items on the Items page or in the list of unscheduled items when building an agenda using the **Add Item** button.

If the option is set to **Off**, the following applies:

- Agendas: Agenda Coordinators, Drafters, and View Only users can access final agendas in view-only mode even if they are not part of a user group that has access to the associated meeting bodies.
- Agenda Items: Agenda Coordinators, Drafters, and View Only users can view approved agenda items of these meeting bodies in read-only mode.

Note: Approvers in a workflow are not affected when this security setting is **Off**; they can always access an agenda item they are a reviewer for.

Set to Approved/Set to Draft Function Menu

The **Set to Approved** drop-down menu enables you to set the minimum permission level needed to access the **Set to Approved/Set to In Draft** button found on the [Agenda Item Details page](#). This button is used to bypass an approval workflow on a draft item and move it immediately to the Approved state, or, when unlocked by a Peak Admin or Agenda Coordinator, a user can move an approved item back to In Draft. This menu enables a Peak Admin to control which users can access this function by selecting from four options: **None** (this option disables the feature for all users), **Drafter-owner and above**, **Agenda Coordinator and above**, and **Peak Admin only**.

Note: The **None** selection here is not related to the None role; instead, it hides this button for any role in Peak, thus disabling the **Set to Approved/Set to Draft** function. The default selection is Drafter-owner and above.

Set to Approved

Which role(s) should be able to use the Set To Approved button on the item details page?

Drafter-owner and above

None (disable feature)
Drafter-owner and above
Agenda Coordinator and above
Peak Admin only

Approver Editing Permissions

Use the Approvers can edit items in an approval workflow toggle to set whether approvers can make changes to the items they're approving. The default setting is **Off**.

Set to Approved

Which role(s) should be able to use the **Set To Approved** button on the item details page?

☒ **Approvers can edit items in an approval workflow**

With this setting, users normally blocked from editing an item due to their role, user group restrictions, or enhanced security can edit the item details if they are part of the workflow. These permissions apply only while the approval phase is active for that user. Once the user has approved or delegated, their normal permissions take effect.

Note: This setting does not apply to FYI-only users in an active workflow phase. These users continue to have read-only or edit access based on their role, user group, and enhanced security restrictions.

Be sure to click **Save** at the bottom right to apply a changed setting to Peak.

[<<< Previous: Configuring Site Information](#)

[>>> Next: Navigating the Meetings Page](#)

[Return to Peak help topics](#)

Peak Agenda Management: Agenda Items

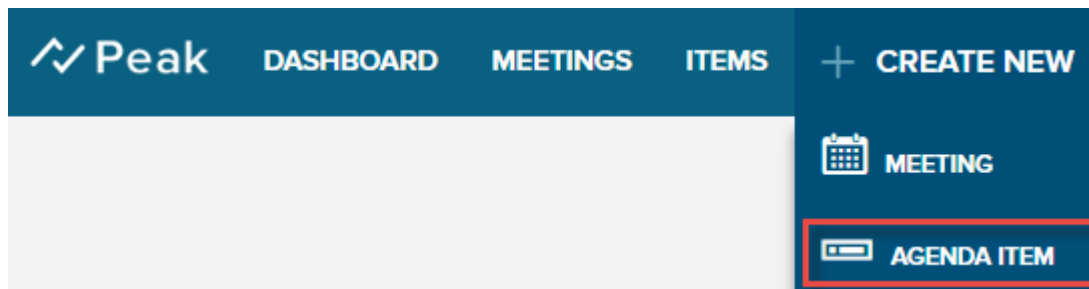
In this section, learn how to draft and edit agenda items and generate agenda packets for the public or council.

	Navigating the Items Page
Peak Agenda Items	Using Advanced Search
	Creating Agenda Items
	The Item Details Page
Item Details Page	Item History
	Creating a New Version of an Agenda Item
	Generating Agenda Item Packets
	Activity Stream Email Notifications

Creating Agenda Items in Peak

Use this page to create agenda items and attach them to specific meeting bodies and meetings. This functionality is available to users with an [Admin](#), [Agenda Coordinator](#), or [Drafter](#) role.

1. To create an agenda item, click **Create New** on the Peak navigation bar, then choose **Agenda Item**.



The following figure illustrates the fields on the Agenda Item Details page. Required fields are indicated by a red asterisk.

Agenda Item Details

ITEM TITLE *

SUGGESTED ACTION

ITEM TYPE *

Select an Item Type

ITEM ID

2016-XXXX-Granicus

SUBMITTING DEPARTMENT

Select a Department

DRAFTER

Granicus Support

MEETING BODY *

Select a Meeting Body

MEETING DATE

Select a Meeting

AGENDA SECTIONS

2. Enter the details for your agenda item, described in the table below.

Feature	Action
Item Title	Click the field, then type the name of the agenda item. If formatting is turned on in Admin , you can format using font, size, bold, italic, strikethrough, underline, color, and bullet or numbered lists. This field has a five-thousand-character limit.
Suggested Action	Click the field, then type a suggested action for your agenda item. This field has a five-thousand-character limit.
Item Type	Select an item type from the drop-down menu.
Item ID	This is the unique tracking number that the system automatically assigns to each item. Please note that while you are drafting an

item, the ID will show format only; a number will be assigned once you click **Save**.

Submitting Department

Use the drop-down menu to select which [department](#) is submitting the agenda item.

Drafter

The **Drafter** field is auto-populated with the name of the current user. You can change the drafter to another name by clicking on the drop-down menu, but after saving, you will no longer have access to this item as the drafter. Whomever you have reassigned as drafter of the agenda item will be able to edit the details.

This menu contains all users with the roles of Drafter, Agenda Coordinator, and Admin.

Meeting Body

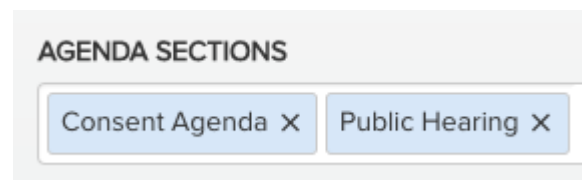
Use the drop-down menu to select a target [meeting body](#) for the agenda item.

Meeting Date

This drop-down menu contains a chronological list of all [meetings](#) in the coming year associated with the body selected in the **Meeting Body** menu. Click the menu and choose the meeting date for this agenda item.

Agenda Sections

This drop-down menu is populated with the sections of the agenda for the meeting selected in the **Meeting Date** menu. The sections will be based on the structure of the [meeting type](#) used for the meeting at the time of its creation. Click the menu and select which section of the agenda this item should be attached to. You can add the item to multiple sections by selecting more sections from the menu. Remove a section by clicking the **x** next to its name.

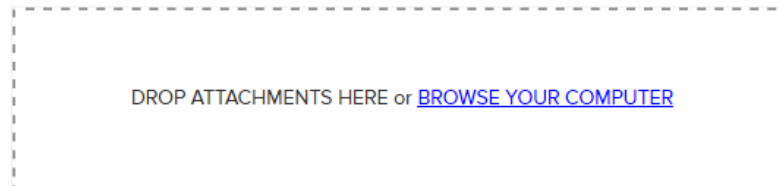


3. Enter information into any [custom fields](#) set up by a Peak Admin.

4. Add attachments if applicable. You can rename your attachments and specify the level of privacy desired. Each attachment can be up to 200 MB in size. Most Windows- and Mac-based file types are supported ([see a full list here](#)). All files will be converted to PDF for packet generation.

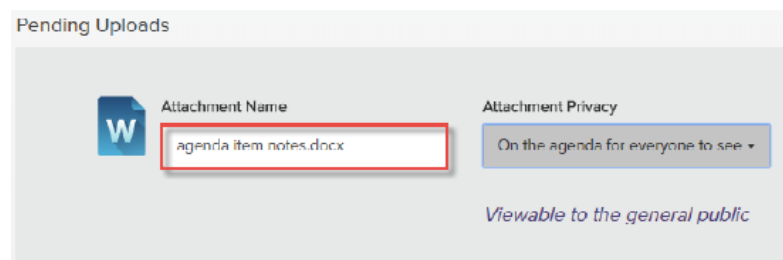
Click **Browse Your Computer** to browse locally for files, or you can drag-and-drop files anywhere within the box.

Attachments



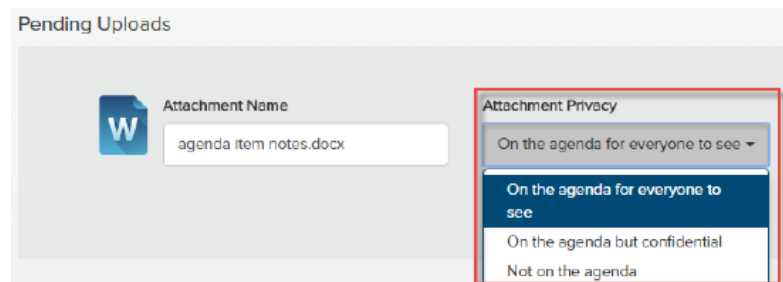
Your upload will show as pending. Click the **Attachment Name** field to rename the attachment if necessary.

Attachment Name



Now, click the Attachment Privacy drop-down menu and choose the appropriate level of privacy for this attachment: *On the agenda for everyone to see*, *On the agenda but confidential*, or *Not on the agenda*.

Attachment Privacy



5. Choose whether you want to set up an [approval workflow](#) at this time. You can also do this later by editing an existing agenda item. To set up approvals, click the **Set up Approvals** checkbox before you click **Save**.



6. Click the green **Save Item** button to save your meeting details and attachments—attachments are not uploaded until you save.

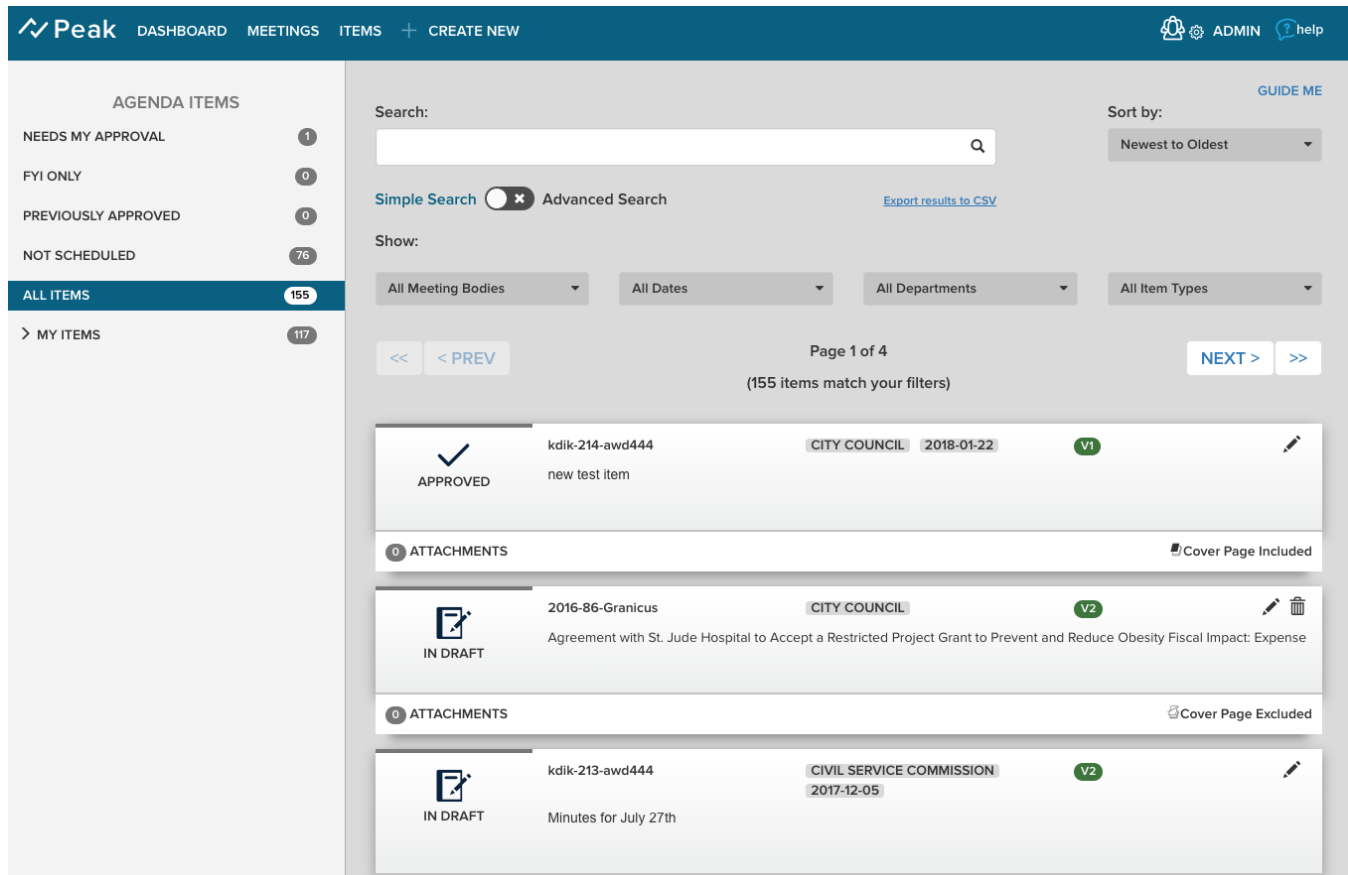
[<<< Previous: Navigating the Items Page](#)

[>>> Next: Editing Agenda Items](#)

[Return to Peak help topics](#)

Navigating the Items Page in Peak

The Items page lists all agenda items that are in the system. From this page, you can filter, search, and sort agenda items. The page displays up to 50 items at a time. Use the **< Prev** and **Next >** buttons to view more items. The back (<<) and forward (>>) double arrows enable you to jump to the first or last page of items.



The screenshot shows the Peak Agenda Management interface. The top navigation bar includes 'Peak', 'DASHBOARD', 'MEETINGS', 'ITEMS', and 'CREATE NEW'. The left sidebar lists 'AGENDA ITEMS' with counts: 'NEEDS MY APPROVAL' (1), 'FYI ONLY' (0), 'PREVIOUSLY APPROVED' (0), 'NOT SCHEDULED' (76), 'ALL ITEMS' (155), and 'MY ITEMS' (117). The main content area features a search bar, a 'Sort by' dropdown set to 'Newest to Oldest', and a 'Show:' section with filters for 'All Meeting Bodies', 'All Dates', 'All Departments', and 'All Item Types'. Below these are navigation buttons: '<<', '< PREV', 'Page 1 of 4', '(155 items match your filters)', 'NEXT >', and '>>'. The list of items includes:

- APPROVED** (checkmark icon): kdlk-214-awd444, CITY COUNCIL, 2018-01-22, V1, new test item. ATTACHMENTS: 0, Cover Page Included.
- IN DRAFT** (pencil icon): 2016-86-Granicus, CITY COUNCIL, V2, Agreement with St. Jude Hospital to Accept a Restricted Project Grant to Prevent and Reduce Obesity Fiscal Impact: Expense. ATTACHMENTS: 0, Cover Page Excluded.
- IN DRAFT** (pencil icon): kdlk-213-awd444, CIVIL SERVICE COMMISSION, 2017-12-05, V2, Minutes for July 27th.

wowThe item cards give you at-a-glance information about each agenda item:

Feature	Description
Status	Each item's status is shown on the left side as either 1) In Draft, which means that an item has been created but is not yet going through an approval process, 2) In Review, meaning the item is currently in the workflow process of approvals, or 3)

Approved, which indicates that the item has completed the workflow process and has been approved by all assignees.

2016-197-Granicus

LICENSE AND VARIANCE BOARD

2017-03-09

V1

Clerk to the Board Day 2017

0 ATTACHMENTS

Cover Page Included

The item's automatically generated ID number displays near the top left.

Item ID

2016-162-Granicus

PARKS & RECREATION COMMISSION

V1

Naming Discussion of Park Parcel at the Corner of Ridge Road and Cressman

0 ATTACHMENTS

Cover Page Included

The item's name displays under the ID number.

Item's Name

2016-165-Granicus

LICENSE AND VARIANCE BOARD

2016-12-22

V1

Renewal - Grappa Inc. d/b/a Grappa Mediterranean Bistro & Margarita Grill, 1027 Washington Avenue (City Attorney)

2 ATTACHMENTS

AVC 1.png AVC 2.png

Cover Page Included

Item cards also show the number of attachments associated with the item. Click the **arrow** next to the work Attachments to view them, and click the name of an individual attachment to view it.

Attachments

2016-143-Granicus

PUBLIC ART COMMISSION

V2

Finalized Public Art Commission Policy Handbook

2 ATTACHMENTS

Final Handbook 5288593.docx Revised Handbook.docx

Cover Page Included

CURRENT APPROVER(S): Albert Einstein, Gertrude Stein, Katrina Van Marter

Scheduled Date

If the item has been scheduled, you'll see the meeting body it is scheduled to and the meeting's date at the upper right of the card.


IN REVIEW

2016-188-Granicus
Item 4439876

CIVIL SERVICE BOARD
2017-04-04

V1



0 ATTACHMENTS

Cover Page Included

CURRENT APPROVER(S): Albert Einstein, Gertrude Stein, Katrina Van Marter

The record number indicates which [record of the item](#) this card represents. The most current record will be highlighted in green.

Record
Number


IN DRAFT

2016-160-Granicus
Broadband Discussion

ELECTION COMMISSION

V2




0 ATTACHMENTS

Cover Page Included

Click the **pencil** icon on an item card to edit its details. The edit function is available to the Drafter of the item, or to users with an Agenda Coordinator or Admin role. The **pencil** will also take you to the approval workflow of the item.

Pencil


IN REVIEW

2016-189-Granicus
Concert in the Park Series

CITY EVENT COMMISSION

V1




2 ATTACHMENTS

Cover Page Included

CURRENT APPROVER(S): Cynthia Morton

When an item is in the queue for your review and approval, there will be an **eye** icon in instead of the **pencil**. Clicking the **eye** enables you to view the details of and attachments associated with the agenda item. You'll be able to view these items indefinitely after they have been approved.

Eye


IN DRAFT

2016-107-Granicus
Small Business Council Initiatives

SMALL BUSINESS COUNCIL

V2



0 ATTACHMENTS

Cover Page Included

Trash can

A **trash can** icon will display in the upper right-hand corner of the item card if the item is not associated with a meeting date. Click the **trash can** to delete the item from the system.

 APPROVED	2016-100-Granicus MLK Day Proclamation 2016	CITY COUNCIL	V3	
0 ATTACHMENTS		Cover Page Included		

The bottom right of the card displays whether this item has a [cover page included or excluded for agenda packets](#), as defined on the [item's details page](#).

Cover Page

 IN DRAFT	2016-148-Granicus Bike Library Update	CITY COUNCIL	2016-12-23	V3	
0 ATTACHMENTS		Cover Page Included			

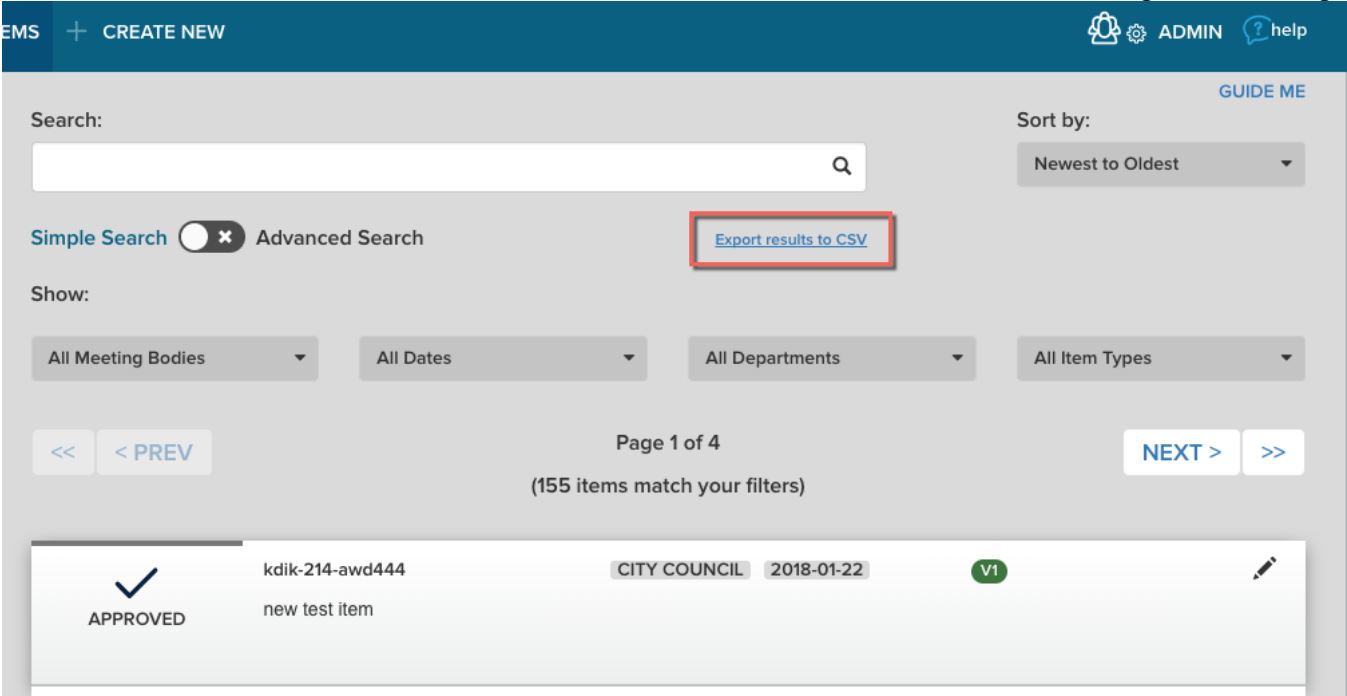
If the item is in review, approver(s) in the current phase who have not yet approved the item will display at the bottom of the card. The Drafter or Agenda Coordinator can use this information to quickly see the status of an [item's workflow](#) without navigating to the item details page.

Approval Status

 IN REVIEW	2016-188-Granicus Item 4439876	CIVIL SERVICE BOARD 2017-04-04	V1	
0 ATTACHMENTS		Cover Page Included		
CURRENT APPROVER(S): Albert Einstein, Gertrude Stein, Katrina Van Marter				

On this page there are multiple sorting, filtering, and searching options to help you find the agenda items you want to work with. Up to fifty items will display per page, and you can use the **Next** and **Prev** buttons to navigate.

You can export the currently displayed list of items using the **Export results to CSV** link found near the top of the page.



The spreadsheet will contain columns for the following:

- Item ID
- Version
- Title
- Status
- Type (for Agenda Item Type)
- Submitting Department
- Meeting Body
- Meeting Date
- Current Approver(s) (if the agenda item is in review)
- Any Custom Fields for the jurisdiction, whether hidden or not

The items are ordered from oldest to newest, regardless of how they are displayed on the screen. You can provide additional sorting and filtering of the resulting CSV file when viewed in Excel.

Use any of the following to narrow the list of items:

Feature	Action
Needs My Approval	Click Needs My Approval filter to show only those agenda items awaiting your approval.

NEEDS MY APPROVAL	3
FYI ONLY	0
PREVIOUSLY APPROVED	0

Click the **FYI Only** filter to show only those items to which you're assigned as an FYI-only viewer on a workflow. This includes items that are in review or have been approved.

FYI Only

NEEDS MY APPROVAL	3
FYI ONLY	0
PREVIOUSLY APPROVED	0

The **Previously Approved** filter shows those items you have already approved.

Previously Approved

FYI ONLY	0
PREVIOUSLY APPROVED	0
NOT SCHEDULED	2

The **Not Scheduled** filter shows only those items not currently scheduled on an agenda.

Not Scheduled

PREVIOUSLY APPROVED	0
NOT SCHEDULED	2
ALL ITEMS	31

All Items

This is the default filter for the page. Click **All Items** to show all agenda items stored in Peak. Only Drafters, Agenda Coordinators, and Admins will be able to view **All Items**.

NOT SCHEDULED	2
ALL ITEMS	31
▼ MY ITEMS	4

Click this filter to show only items that belong to you. You can also further specify the filter by clicking **In Draft**, **In Review**, **Approved**, or **Not Scheduled**. Only Drafters, Agenda Coordinators, and Admins will be able to view **My Items**.

My Items

▼ MY ITEMS	4
IN DRAFT	3
IN REVIEW	0
APPROVED	1
NOT SCHEDULED	0

Click the **Search** field, then type part or all of an item name or ID number to quickly find it. Delete text from this field to remove the search filter. Use the toggle to switch to an [Advanced Search](#).

Note: You can search by agenda item ID to see all records of a particular item with the same item ID.

Search

Search:

Simple Search

☒ Advanced Search

Show:

All Meeting Bodies

All Dates

All Departments

<<

< PREV

Page 1 of 3

(123 items match your filters)

✓

APPROVED

2016-188-Granicus

Item 4439876

CIVIL SERVICE BOARD

2017-01

0

ATTACHMENTS

Use the **Meeting Bodies** drop-down menu to apply a filter that shows only those items associated with the selected meeting body.

Meeting Bodies

Search:

Simple Search ☒ Advanced Search

Show:

Civil Service Board All Dates

Use the **Dates** drop-down menu to apply a filter that shows only those items associated with the selected meeting date. You can also select **Not Scheduled** at the top of the menu to filter by items not scheduled on an agenda.

Dates

Search:

Simple Search ☒ Advanced Search

Show:

Civil Service Board February 22nd, 2016

Use the **Departments** drop-down menu to apply a filter that shows only those items associated with the selected department.

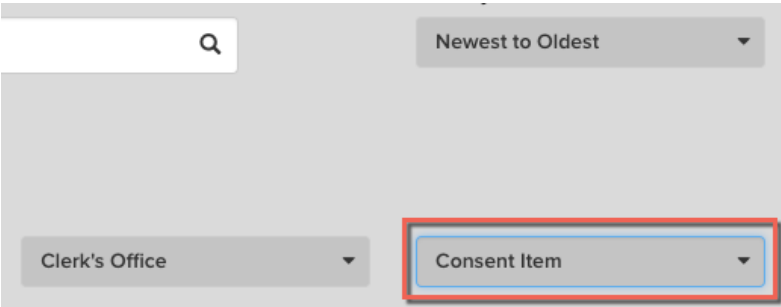
Departments

Search

February 22nd, 2016 Clerk's Office

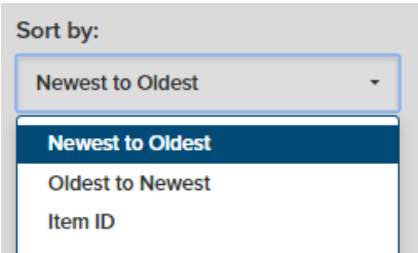
Item Types

Use the **Item Types** drop-down menu to apply a filter that shows items of the selected type, e.g., Ordinances.



Use the **Sort by** drop-down menu to arrange items in order of *Newest to Oldest*, *Oldest to Newest*, or by *Item ID*.

Sort by



Please note that the above filters, as well as the **Search** function, are additive. Each filter must be unselected to clear its effect.

[<<< Previous: Publishing an Agenda](#)

[>>> Next: Using Advanced Search](#)

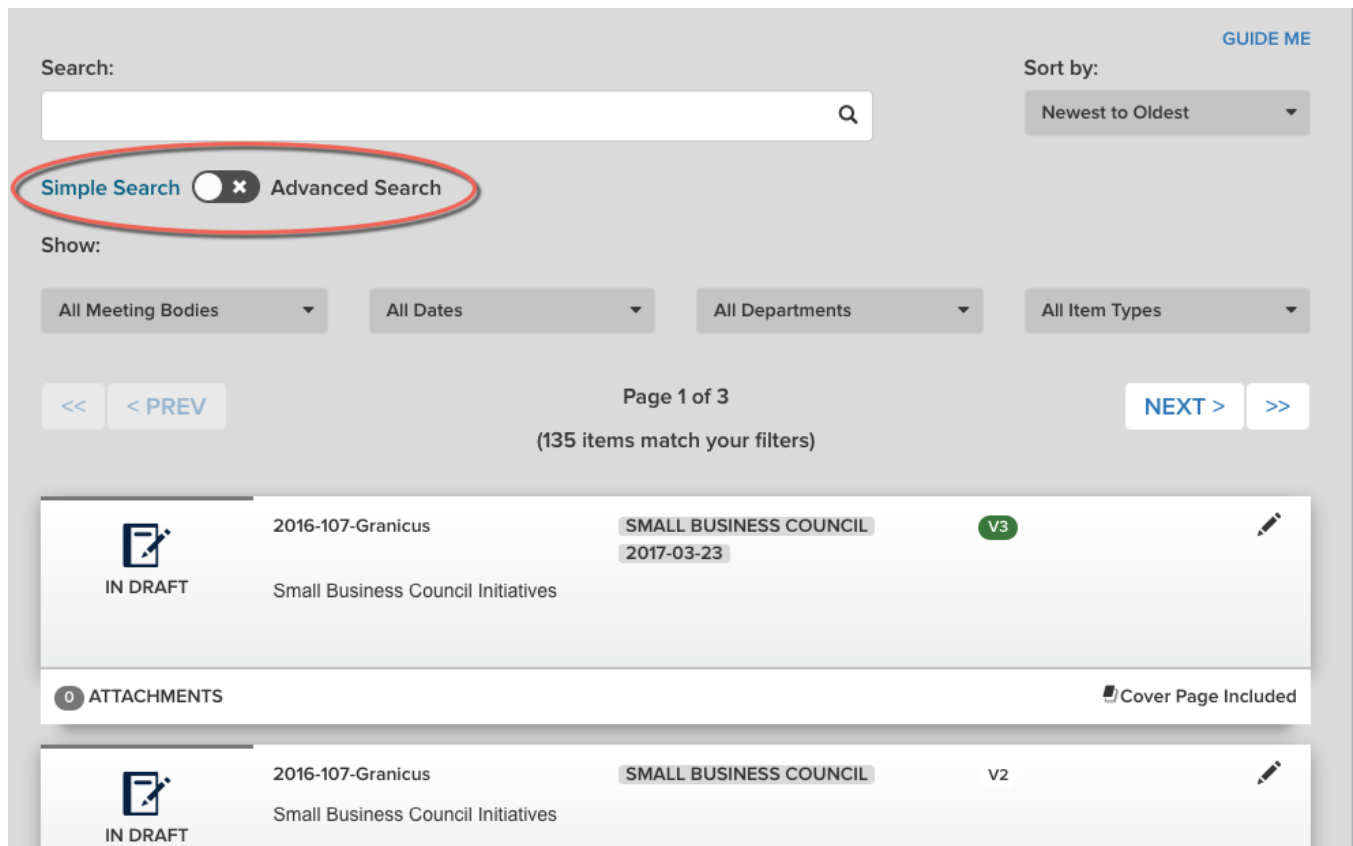
[Return to Peak help topics](#)

Using Advanced Search for Agenda Items

On the Items page, Peak gives you the ability to use a simple or advanced search. To use a simple search, type keywords or an item ID in the **Search** field. The results are filtered as you type.

Advanced Search

To use advanced search, use the toggle found under the **Search** field. It will be on **Simple Search** by default. Click to move it to **Advanced Search**:



The screenshot shows the Granicus search interface. At the top, there is a search bar and a 'Sort by' dropdown menu set to 'Newest to Oldest'. Below the search bar, there is a toggle switch for 'Simple Search' and 'Advanced Search'. The 'Simple Search' option is currently selected, but the 'Advanced Search' option is highlighted with a red circle. Below the toggle, there are several filter buttons: 'All Meeting Bodies', 'All Dates', 'All Departments', and 'All Item Types'. The results section shows 'Page 1 of 3' with '(135 items match your filters)'. The first result is '2016-107-Granicus' with the title 'Small Business Council Initiatives', labeled 'IN DRAFT', and version 'V3'. The second result is '2016-107-Granicus' with the title 'Small Business Council Initiatives', labeled 'IN DRAFT', and version 'V2'. Both results have a 'SMALL BUSINESS COUNCIL' tag and a date of '2017-03-23'. There is also a 'Cover Page Included' indicator.

The Advanced Search fields display:

ADVANCED SEARCH

ITEM TITLE:

SUGGESTED ACTION:

ITEM TYPE: All Item Types

DRAFTER: All Drafters

MEETING DATE: Select a Meeting Date or Range

SUBMITTING DEPARTMENT: All Departments

MEETING BODY: All Meeting Bodies

ITEM ID:

ATTACHMENT SEARCH:

CUSTOM FIELDS

ADD CUSTOM FIELD SEARCH

RESET ALL FIELDS CANCEL SEARCH

You can search using any of the standard fields on an agenda item. Searches are not case sensitive.

Item Title

Enter text in the field to find all agenda item whose **Title** fields contain keywords entered. This field uses an intelligent search, which will return not only exact matches on English words but root word matches. For example,

- a search for "Negotiating" would also return items with "negotiate," "negotiation," etc., in the field;
- a search for "selection" would also return items with "select," "selecting," etc., in the field.

This field uses an *OR* type search if you enter multiple keywords, i.e., search results will include items that contain any one or more of the keywords entered.

Note: Searching for a word such as "legislation" will find agenda items that contain the word "legislation," but not those item titles in which the word is contiguous with other characters, for example, "legislation_080917" or "legislation10." Unlike simple search, which finds all items that contain a set of characters in the title as a partial or complete match, advanced search performs an intelligent exact-match search in these cases. To find these agenda items with advanced search, provide the complete set of contiguous, non-whitespace characters to retrieve the item, e.g., "legislation10."

Suggested Action

Enter text in the field to find all agenda items whose **Suggested Action** fields contain keywords entered. This field uses an intelligent search, which will return not only exact matches on English words but root word matches. For example,

- a search for "Negotiating" would also return items with "negotiate," "negotiation," etc., in the field;
- a search for "selection" would also return items with "select," "selecting," etc., in the field.

This field uses an *OR* type search if you enter multiple keywords, i.e., search results will include items that contain any one or more of the keywords entered.

Item Type

This drop-down menu contains the item types used in your Peak system.

Drafter

This drop-down menu contains the users set up in your Peak system.

Meeting Date

This drop-down menu contains multiple options for searching by date.

MEETING DATE:

ALL DATES

ALL DATES

ON

BEFORE

AFTER

BETWEEN

NOT SCHEDULED

Select an option and then select dates as described in the table below to narrow your search:

All Dates	This is the default selection and will not narrow the search based on dates.
On	This selection will return results that are scheduled only for the specified date. Select a date using the date picker (



) or enter a date in the field using the MM/DD/YYYY format.

This selection will return results prior to this date. The results will not be inclusive of the selected date.

Before

Select a date using the date picker (



) or enter a date in the field using the MM/DD/YYYY format.

This selection will return results following this date. The results will not be inclusive of the selected date.

After

Select a date using the date picker (



) or enter a date in the field using the MM/DD/YYYY format.

This selection will return results scheduled in the ranges spanning the two dates entered. This is an inclusive search, i.e., the results will include events that are scheduled on the two selected dates.

Between

MEETING DATE:	START:	END:
BETWEEN	02/12/2017	03/31/2017

Use the calendar picker (



) in the **Start** and **End** fields to select the range of dates to search.

Not Scheduled This selection will return all unscheduled agenda items.

Submitting Department

This drop-down menu contains the departments used in your Peak system.

Meeting Body

This drop-down menu contains the meeting bodies used in your Peak system.

Item ID

Type an item ID in the field. This will return only exact matches for the item ID entered.

Attachment Search

Enter a filename or key words in the field. The system will search filenames, author, and title meta-data, as well as text contents of a document.

- You can also do a wildcard search (*.docx) to search for all agenda items with a DOCX attachment type. Enclose your search in double quotes in this field to search for filenames that include spaces, e.g., “minutes for 011217 meeting.docx”.
- Up to 100 agenda items can be returned. Once results are returned, the attachments matching the criteria are highlighted in yellow.

Searching Standard Fields

Enter a value into a field or any combination of fields as described above and click **Search**.

Results of the search are shown with best matches at the top. If you search using more than one field, this is an *AND* type search, i.e., to be included in the results, items must contain matching values from all fields into which you enter data.

You'll also get an item count so you can see how many items match your search terms:

Page 1 of 1
(3 items match your advanced search)

 IN DRAFT	2016-100-Granicus MLK Day Proclamation 2016	CITY COUNCIL	V1	
0 ATTACHMENTS		Cover Page Included		
 IN DRAFT	2016-100-Granicus MLK Day Proclamation 2016	CITY COUNCIL	V2	
0 ATTACHMENTS		Cover Page Included		
 APPROVED	2016-100-Granicus MLK Day Proclamation 2016	CITY COUNCIL	V3	 
0 ATTACHMENTS		Cover Page Included		

You can edit the terms of your search by clicking the **edit advanced search** link, which will display next to the toggle once you've used advanced search during your current Peak session (once you log out, the search will be cleared).

Search: GUIDE ME

Sort by: Newest to Oldest

Simple Search ☒ Advanced Search [edit advanced search](#)

Show: All Meeting Bodies All Dates All Departments All Item Types

<< < PREV Page 1 of 1 (3 items match your advanced search) NEXT > >>

Clicking the link reopens the fields, enabling you to change information or add search terms to more fields. You can also click **Reset All Fields** at the bottom left to clear the search and start over. Click **Search** again when you've finished editing your terms.

ADVANCED SEARCH

ITEM TITLE:

SUGGESTED ACTION:

ITEM TYPE:

All Item Types

DRAFTER:

Anastasia Corkery

MEETING DATE:

AFTER

DATE:

02/15/2017

SUBMITTING DEPARTMENT:

All Departments

MEETING BODY:

All Meeting Bodies

ITEM ID:

CUSTOM FIELDS

ADD CUSTOM FIELD SEARCH

RESET ALL FIELDS

CANCEL

SEARCH

To return to simple search, either first clear all the fields in Advanced Search with the **Reset All Fields** button and then click **Cancel**, or run an advanced search and then toggle the switch back to **Simple Search**

Adding Custom Fields to Your Search

You can also add one or more custom fields to your advanced search. With the Advanced Search modal open, click the **Add Custom Field Search** button at the bottom of the modal.

All Departments

▼

ITEM ID:

CUSTOM FIELDS

ADD CUSTOM FIELD SEARCH

RESET ALL FIELDS

Once you click the button, you'll see a drop-down menu containing the custom fields that have been set up in your system and used in the creation of at least one agenda item. Select the custom field you'd like to use in this search.

CUSTOM FIELDS

CUSTOM FIELD 1:

Select a Custom Field

▼

Alternate Contact

Additional Notes

Referring Meeting Body

Going to Council?

Select a

ALL F

Depending on what type of custom field you've selected, you will enter text or make a selection to specify what the search should look for. The custom fields selected in the examples shown below are named after the type of field represented. The **Custom Field** drop-down menu in your Peak system will contain the labels of the custom fields set up by your Peak Admin.

Custom Field Type Input Type

Text

Text Field

CUSTOM FIELDS

CUSTOM FIELD 1:

Text Field

Enter search here



ADD CUSTOM FIELD SEARCH

Calendar selector

Date Picker

CUSTOM FIELDS

CUSTOM FIELD 1:

Date Picker



ADD CUSTOM FIELD SEARCH

ALL FIELDS

January 2017

Su	Mo	Tu	We	Th	Fr	Sa
01	02	03	04	05	06	07

CANCEL

SEARCH

Drop-down menu containing Meeting Bodies

Meeting Body
Combo Box

CUSTOM FIELDS

CUSTOM FIELD 1:

Meeting Body Combo Box



ADD CUSTOM FIELD SEARCH

ALL FIELDS

Election Commission

Financial Committee

Fine Art Commission

Historic Preservation Commission

ARCH

Department Combo
Box

Drop-down menu containing Departments

CUSTOM FIELDS

CUSTOM FIELD 1:

Department Combo Box

ADD CUSTOM FIELD SEARCH

ALL FIELDS

Choose a department

Clerk's Office

Finance

Historic Preservation

Information Technology

ARCH

Drop-down menu containing People

CUSTOM FIELDS

CUSTOM FIELD 1:

People Combo Box

ADD CUSTOM FIELD SEARCH

ALL FIELDS

Pick a person

Brandt Wiza

Amber Ward

Barney Windler

Jeff Schaefer

ARCH

Radio button selection

CUSTOM FIELDS

CUSTOM FIELD 1:

Radio (Yes/No)

Yes

No

X

Text

CUSTOM FIELDS

CUSTOM FIELD 1:

Text Area

Enter search here

X

To add more custom fields to the search, click **Add Custom Field Search** again and make another selection. Use the **X** to the right of any custom field to remove it from the search (click **Reset All Fields** to remove all custom fields you've added). Click **Search** when you're done.

CUSTOM FIELDS

CUSTOM FIELD 1:

☒ Yes ☐ No X

CUSTOM FIELD 2:

 X

[ADD CUSTOM FIELD SEARCH](#)
[RESET ALL FIELDS](#)
[CANCEL](#)
[SEARCH](#)

Custom field searches can be used alone or in conjunction with inputs in the standard fields. If you search using more than one field (standard or custom or a combination), this is an *AND* type search, i.e., to be included in the results, items must contain matching values from all fields into which you enter data.

Notes on Advanced Search

- Searches are not case sensitive.
- Use care when searching for phrases with underscores between words in the **Title** and **Suggested Action** fields. Advanced search will find an item titled "City_Council" by searching for "City_Council" but not when searching only for "City" or "Council" or a partial sub-string of the above.
- Item Title and Suggested Action fields use an *OR* type search if you enter multiple keywords, i.e., search results will include items that contain any one or more of the keywords entered, with best matches containing all entered keywords returned first.
- Item Title and Suggested Action fields use an intelligent search, which will return not only exact matches on English words but root word matches. For example,
 - a search for "Negotiating" would also return items with "negotiate," "negotiation," etc., in the field;
 - a search for "selection" would also return items with "select," "selecting," etc., in the field.
- If you search using more than one field, this is an *AND* type search, i.e., to be included in the results, items must contain matching values from all fields into which you enter data.

[<<< Previous: Navigating the Items Page](#)
[>>> Next: Creating Agenda Items](#)
[Return to Peak help topics](#)

Peak: Agenda Item Details Page

To work with existing agenda items, navigate to the Items page by clicking **Items** in the top menu from anywhere in Peak.

Find the item you need to change by filtering or searching. Click the **pencil** icon in the upper right of the item card of the item you'd like to edit. If you do not see a pencil, you do not have permissions to edit the item. You may see an **eye** icon instead; you'll be able to view the item but not make any changes to it.

Search:

Q

Sort by:

Newest to Oldest

[Simple Search](#)
☐
[Advanced Search](#)

[Export results to CSV](#)

Show:

All Meeting Bodies

All Dates

All Departments

All Item Types

<<
< PREV

Page 1 of 4
(153 items match your filters)

NEXT >
>>



kdik-213-awd444

CIVIL SERVICE COMMISSION
2017-12-05

V2



IN DRAFT

Minutes for July 27th

2 ATTACHMENTS

Cover Page Included



kdik-213-awd444

CITY COUNCIL

V1



IN DRAFT

Minutes for July 27th

0 ATTACHMENTS

Cover Page Included

Once you click the **pencil**, you'll be taken to the Agenda Item Details page for that item.

Agenda Item Details

NEW VERSION

APPROVED 2016-212-Granicus **V1**
6 CCR 1015-3, Emergency Medical Services, Chapter 5, Air Ambulance Licensing.

1 ATTACHMENTS **Cover Page Included**

ITEM DETAILS **APPROVAL STATUS** **ITEM HISTORY**

ITEM TITLE *
6 CCR 1015-3, Emergency Medical Services, Chapter 5, Air Ambulance Licensing.

SUGGESTED ACTION

ITEM TYPE * **ITEM ID**

ITEM ACTIVITY newest on top

Join the conversation...

500 characters left

In reference to attachment

ADD COMMENT

"Hear that? No one's said anything about this item. Why not start the conversation?"

CANCEL **SAVE** ☐ Set up Approvals

At the center top of the page is the item card, with details as shown on the Items page. Above it is a **New Version** button. Along the left is a toolbar that allows you to lock and unlock the item, set its status, create a duplicate, view the agenda if the item is associated with one, change the cover page setting, and download the agenda. Beneath the item card are three tabs: **Item Details**, **Approval Status**, and **Item History**. You'll click the appropriate tab depending on what you want to do. On the right, you'll see the Item Activity stream, where users can leave comments about the item.

Item Details Tab

Item Details is the default tab you'll land on when navigating to the page and shows you the same fields you used to create the item, which you can edit as needed if the item is unlocked (Admins and Agenda Coordinators can unlock the item if needed). Click within a field to make changes. Be sure to click **Save** at the bottom right to preserve any changes you've made.

Approval Status Tab

The **Approval Status** tab takes you to the approval workflow if one has been set up for the item. You can view the status of a workflow, or set up and make changes if you have the permissions to do so. [Read more about approval workflows here.](#)

Item History Tab

This tab displays information on the agenda item in ascending order starting with the item's creation. Each time an agenda item is updated, an entry is made. See here for more on the Item History tab.

Please note that the log will contain only those changes that occurred from the July 21, 2017, release forward. Historical data on existing agenda items created before this feature's release will not be available.

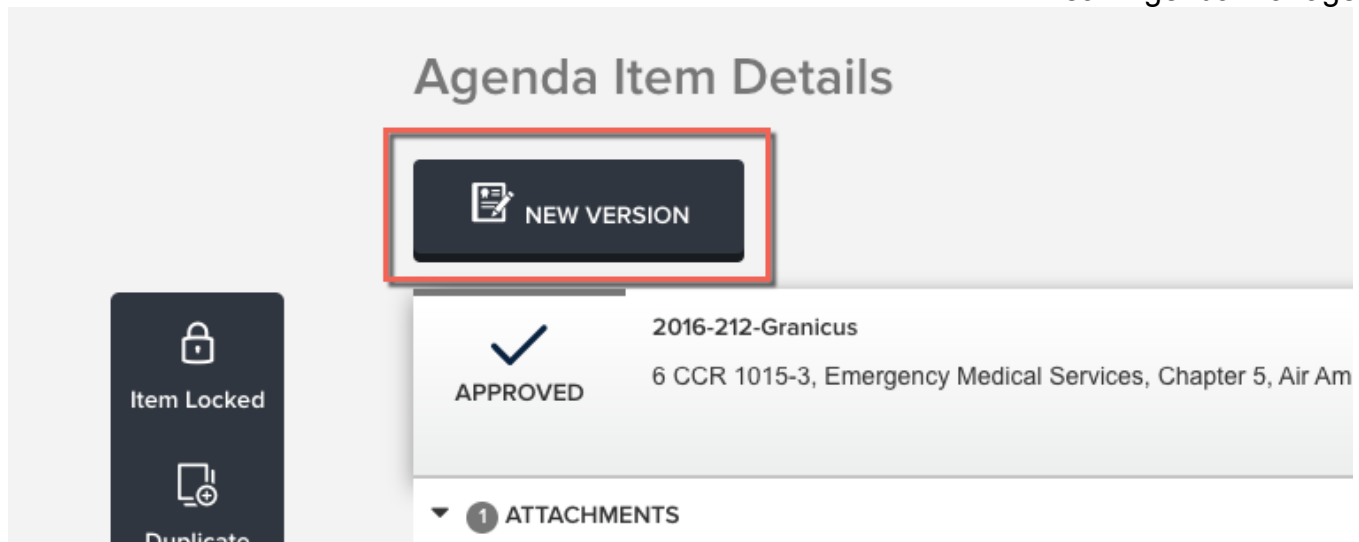
Each entry contains the following:

- The date and time of update
- The name of the user who made the update
- The name of the updated field
- The original value
- The new value

[Read more about what's included in the Item History tab.](#)

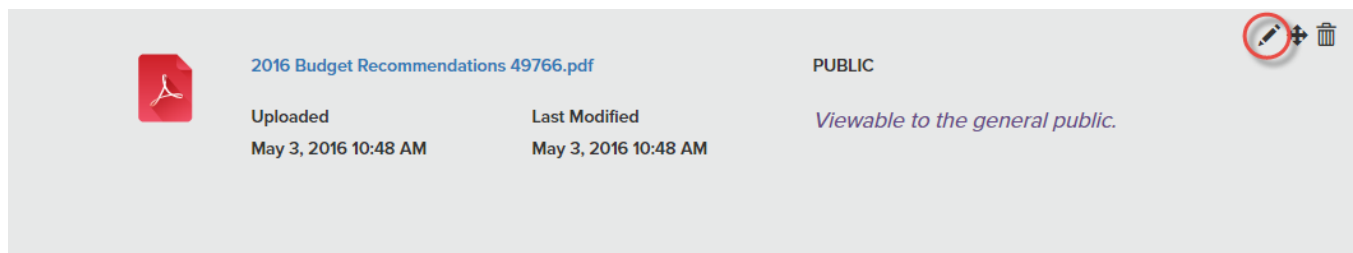
New Version Button

The **New Version** button enables you to create a new version of the agenda item before making changes. This feature is useful for tracking and viewing what changes have been made to your items over time. Distinct from the **Duplicate** function, this option creates a new version of the item with the same agenda item ID; the file can then be modified as desired while the original version is retained. All agenda items start out with a version number of V1, which will be considered the original or “parent” version. Each subsequent version number is increased by 1. You can navigate between versions using the navigation menu and clicking **Prev** or **Next** or clicking the number of the version you wish to view. [Read more about the New Version function here.](#)

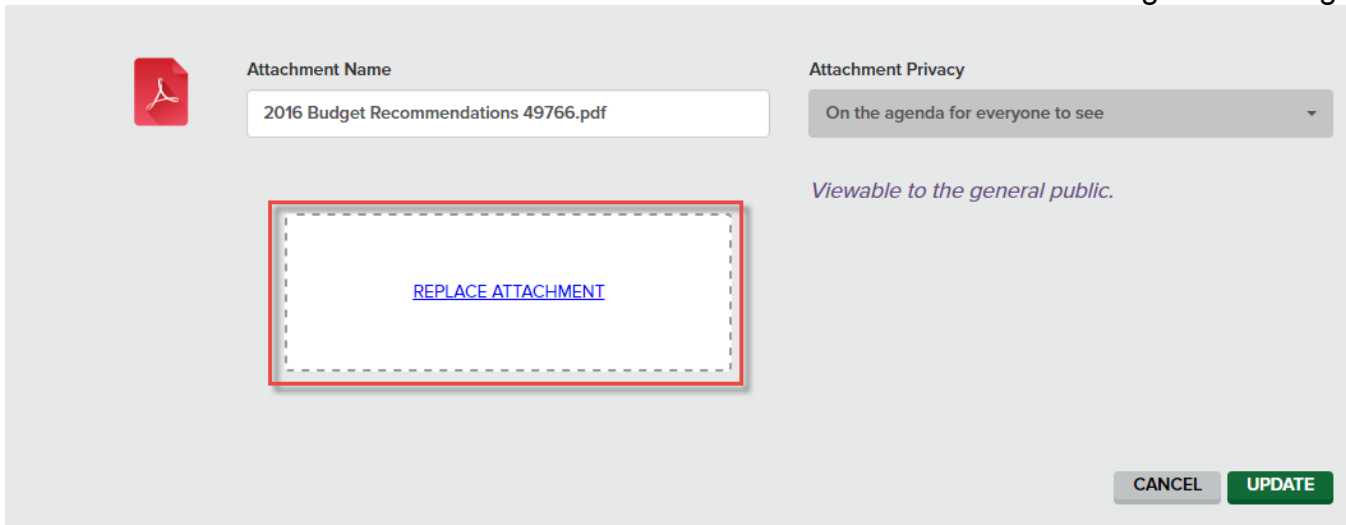


Replacing Attachments

To replace an existing attachment, click the **edit** (pencil) icon on the attachment.



You'll see a **Replace Attachment** link, which you can click to browse your computer for a file, or drag and drop a file over the link. The file can have the same or a different name. Click **Update** to replace the old attachment with the current one.



Attachment Name

2016 Budget Recommendations 49766.pdf

Attachment Privacy

On the agenda for everyone to see

Viewable to the general public.

[REPLACE ATTACHMENT](#)

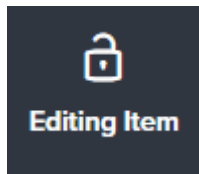
CANCEL UPDATE

Left Menu Options

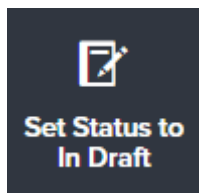
The menu on the left enables you (if you have the proper permissions) to lock or unlock an item, set an item to approved to to draft, duplicate the item, and view the agenda of the meeting with which it's associated.

Feature

Description



If the item is being edited, the padlock icon will display as unlocked with the text **Editing Item**. Click to lock the agenda item and prevent further changes. When the item is locked, the padlock will display as closed and the text will read **Item Locked**. Click to unlock the item (Agenda Coordinators and Peak Admins only).

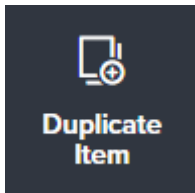


If the item is in draft, there will be an option to **Set to Approved**, which enables you to approve an item without an approval workflow. If the item is approved, you can move it back to draft status by clicking **Set Status to In Draft**.

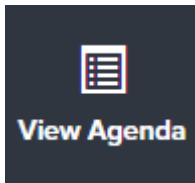
Note: The users to which this button is available depends on the setting on the [Site Settings](#) page in Admin. If the Peak Admin has not made this function available to your user role, the button will not display.

Feature

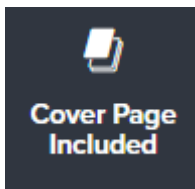
Description



This action creates an item with the same metadata, attachments, and approval workflow phases, if any. The item is assigned a new Agenda Item ID, and the **Meeting Date** and **Sections** fields will be blank. The **Drafter** field should be updated by an Admin or Agenda Coordinator to reflect the name of the drafter using the copy.



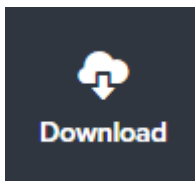
If the item has been assigned to a section of an agenda, you can click View Agenda to be taken to the [Meeting Agenda](#) page for the associated meeting.



Use this button to control whether the item will have a cover page in item packets as well as agenda packets for agendas that contain this item. The default for this setting is controlled on the [Site Settings page](#), but you can change it here. Click to exclude the cover page.

If someone downloads an agenda packet from the agenda details view and elects to include cover pages, any agenda items with cover pages individually excluded will not have a cover page.

If you don't have one set up, contact [Customer Care](#) to request an Agenda Item Cover Page template for your system.



This button gives you the option to download the agenda item's cover page in DOC or PDF format. Also referred to as a staff report, summary report, or item memo, cover pages contain all the information included on the Item Details page. You can also [generate an agenda item packet for the public or for council](#).

Comments

The Item Activity stream on the right side of the page enables drafters and others in the item's workflow to make comments about the item and suggest changes. Click the **Join the conversation...** field and type your comment, then click **Add Comment**.

ITEM ACTIVITY

newest on top

Join the conversation...

500 characters left

ADD COMMENT

"Hear that? No one's said anything about this item. Why not start the conversation?"

The comment displays in the activity stream, and an email notification will be sent to the item's drafter. [Read more details about email notifications here](#). You can edit or delete your own comments using the **pencil** and **trash can** icons. After editing, click **Update Comment** to save the changes.

BRYNN WARRINER

We need to attach the budget recommendations document.

created at 10:39 am on May 03, 2016
updated at 10:41 am on May 03, 2016

If there are files attached to the agenda item, there will be a drop-down menu below the comment field. If your comment relates to an attachment you can select it from the menu.

ITEM ACTIVITY

newest on top

Document has been added

475 characters left

2016 Budget Recommendations 49766.pdf

▼

ADD COMMENT

TODAY

BRYNN WARRINER

We need to attach the budget recommendations document.

created at 10:39 am on May 03, 2016

updated at 10:41 am on May 03, 2016

The comment displays in the stream with a link to the attachment you've referenced.

TODAY



**JANE SMITH**
Document has been added.
*This was made in reference to 2016 Budget Recommendations 49766.pdf
created at 10:54 am on May 03, 2016*

**BRYNN WARRINER**
We need to attach the budget recommendations document.
*created at 10:39 am on May 03, 2016
updated at 10:41 am on May 03, 2016*

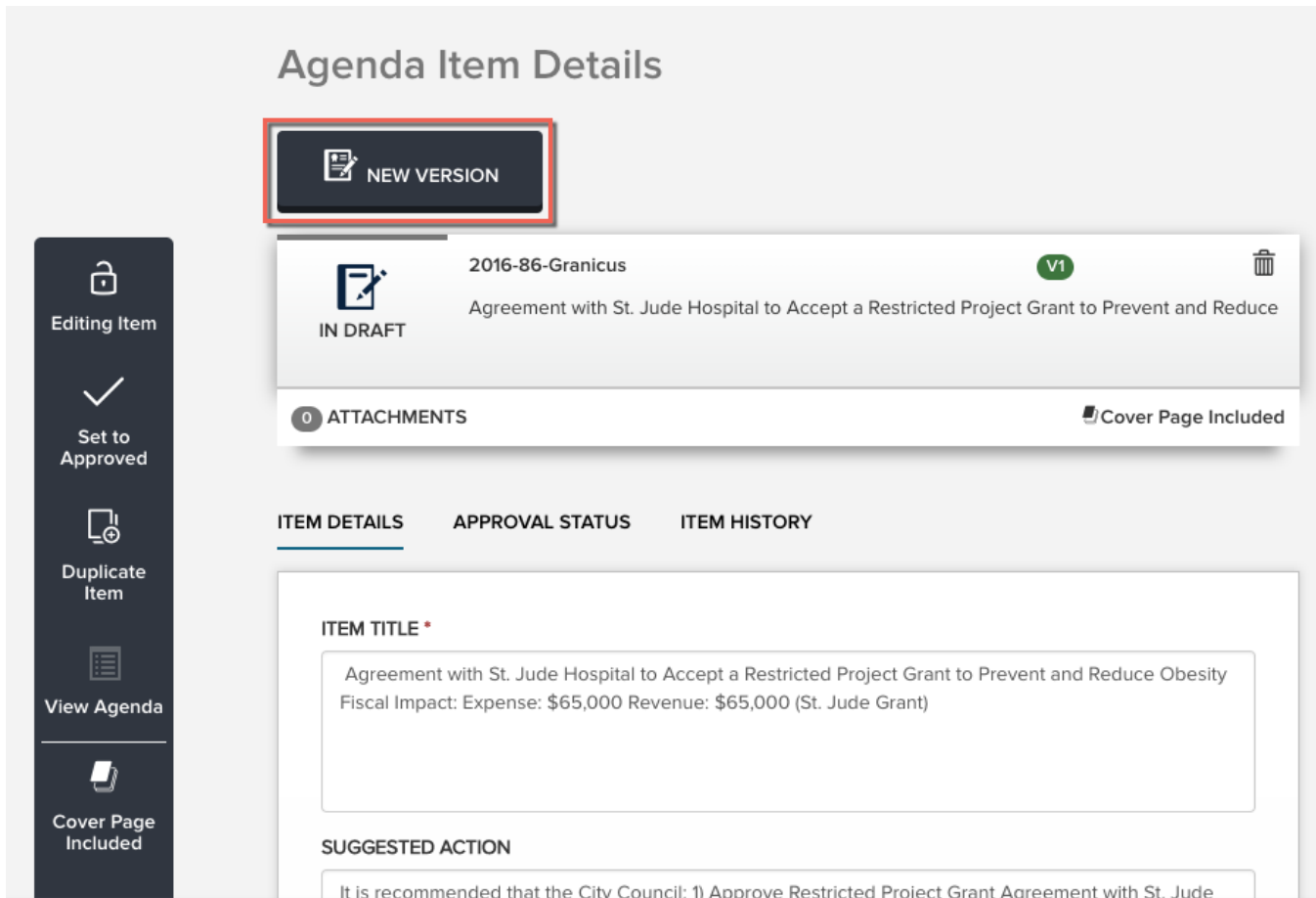
[<<< Previous: Creating Agenda Items](#)[>>> Next: Creating a New Version of an Agenda Item](#)[Return to Peak help topics](#)

Creating a New Version of an Agenda Item in Peak

The **New Version** button enables you to create a new record of an agenda item before making changes. This feature is useful for tracking and viewing what changes have been made to your items over time. It also allows you to leave an agenda item associated with a past meeting while creating a new version you can place on a future meeting if the item was referred, tabled, or amended.

Different from the **Duplicate** function, this option creates a new record of the item with the same agenda item ID; the file can then be modified as desired while the original record is retained.

From the Agenda Item Details page, click the **New Version** button. Note that this action is available only on the most recent version of an item, and only if the item is not in an active approval workflow.



Peak will ask you to confirm that you'd like to create a new version. Click **Yes, Create New Version** to proceed.



Creating a new version of the item copies over all of the item details, but you can edit these details as you wish.

Are you sure you wish to create a new version of the item ' Agreement with St. Mark Hospital to Accept a Restricted Project Grant to Prevent and Reduce Obesity Fiscal Impact: Expense: \$65,000 Revenue: \$65,000 (St. Mark Grant) '?

YES, CREATE NEW VERSION

NO, RETURN TO THE ORIGINAL ITEM

This action takes you to the Agenda Item Details page for the new version of the item. Note that the item has the same agenda item ID, the same content, and the same attachments. Workflows, however, are not copied to the new record. Creating a new version will copy the item's drafter, regardless of who is creating the new version. After a new record is created, the status will be set to IN DRAFT, and the item will be unlocked.

Once a new version has been made, there will be a navigation bar at the top of the Agenda Item Details page that enables you to move between versions by clicking **Prev** or **Next** or clicking the number of the version you wish to view.

Agenda Item Details

NEW VERSION

[< PREV](#)
1
2
[NEXT >](#)

IN DRAFT

2016-86-Granicus

V2

Agreement with St. Jude Hospital to Accept a Restricted Project Grant to Prevent and Reduce

0 ATTACHMENTS

Cover Page Included

All agenda items start out with a version number of V1, which will be considered the original or “parent” version. Each subsequent version number is increased by 1. You can find the version number on the item card on the Items page or the Item Details page. The most current version number will be highlighted in yellow.

Editing a Version of an Agenda Item

The most recent version is considered the current one and is editable. All previous versions of the item will be locked by default but can be unlocked by an Admin or Agenda Coordinator.

Once you create a new version of an agenda item, you'll have the same editing capability that existed for the original item. Separate versions are unique items even though they have the same agenda item ID; changes made to the new version do not change any of the information on the original item or other versions of the item.

Deleting a Version of an Agenda Item

You can use the **trash can** icon to delete the version as long as both of these conditions are met:

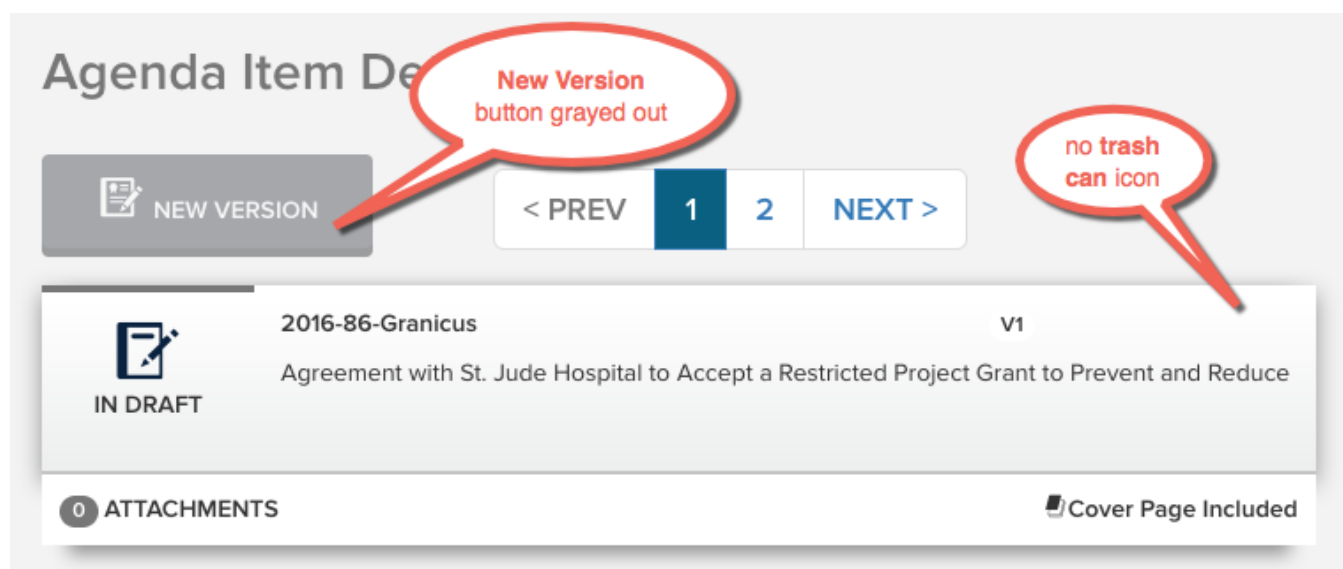
1. The item is the current version (it has the highest number).
2. The version is not associated with a meeting.

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

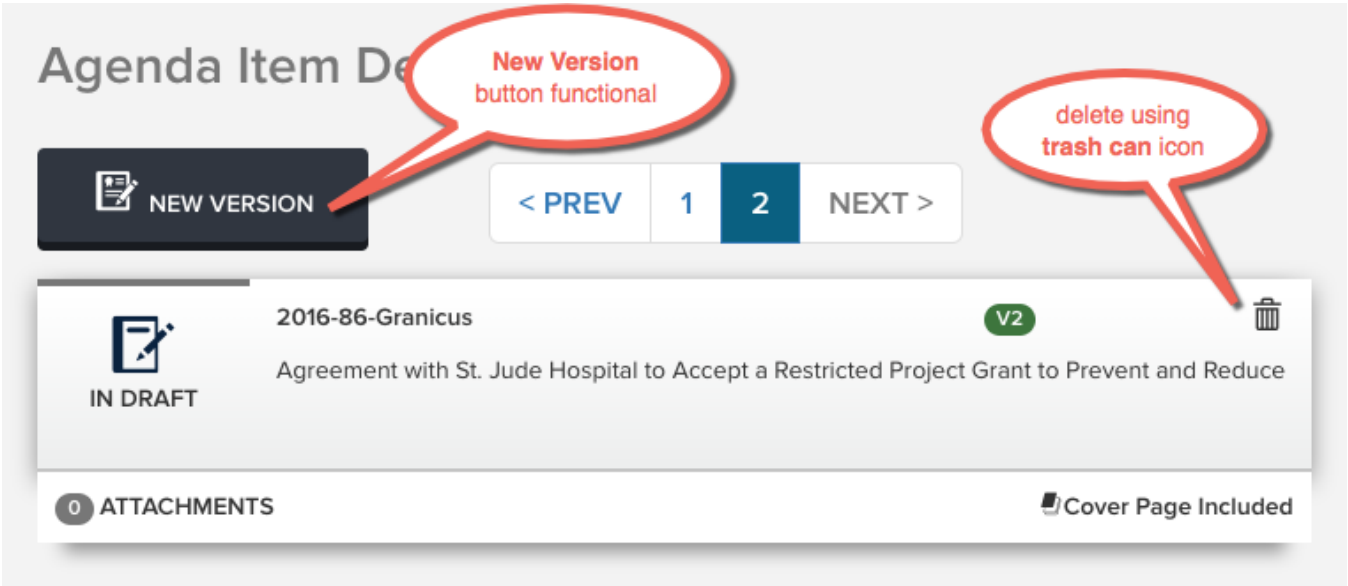
You can delete the unscheduled current version of the item either from the Agenda Item Details page or from the Items page.

- If you click the **trash can** icon from the Agenda Item Details page, you'll be prompted with a confirmation.
- If you delete the current item from the Items page, you'll be prompted with a confirmation including the version and agenda item title of the item you're about to delete.

Note: Deleting a version does not delete the original agenda item, only that version of it. Once it is deleted, the next-highest-numbered version of the item becomes the "current" item, and it too can be deleted provided it is not assigned to a meeting. You can continue all the way through V1.



V1 (original version; item is locked and no deleting or versioning is allowed)



V2 (most recent version; you can delete or create a new version of the item)

[<<< Previous: Editing Agenda Items](#)

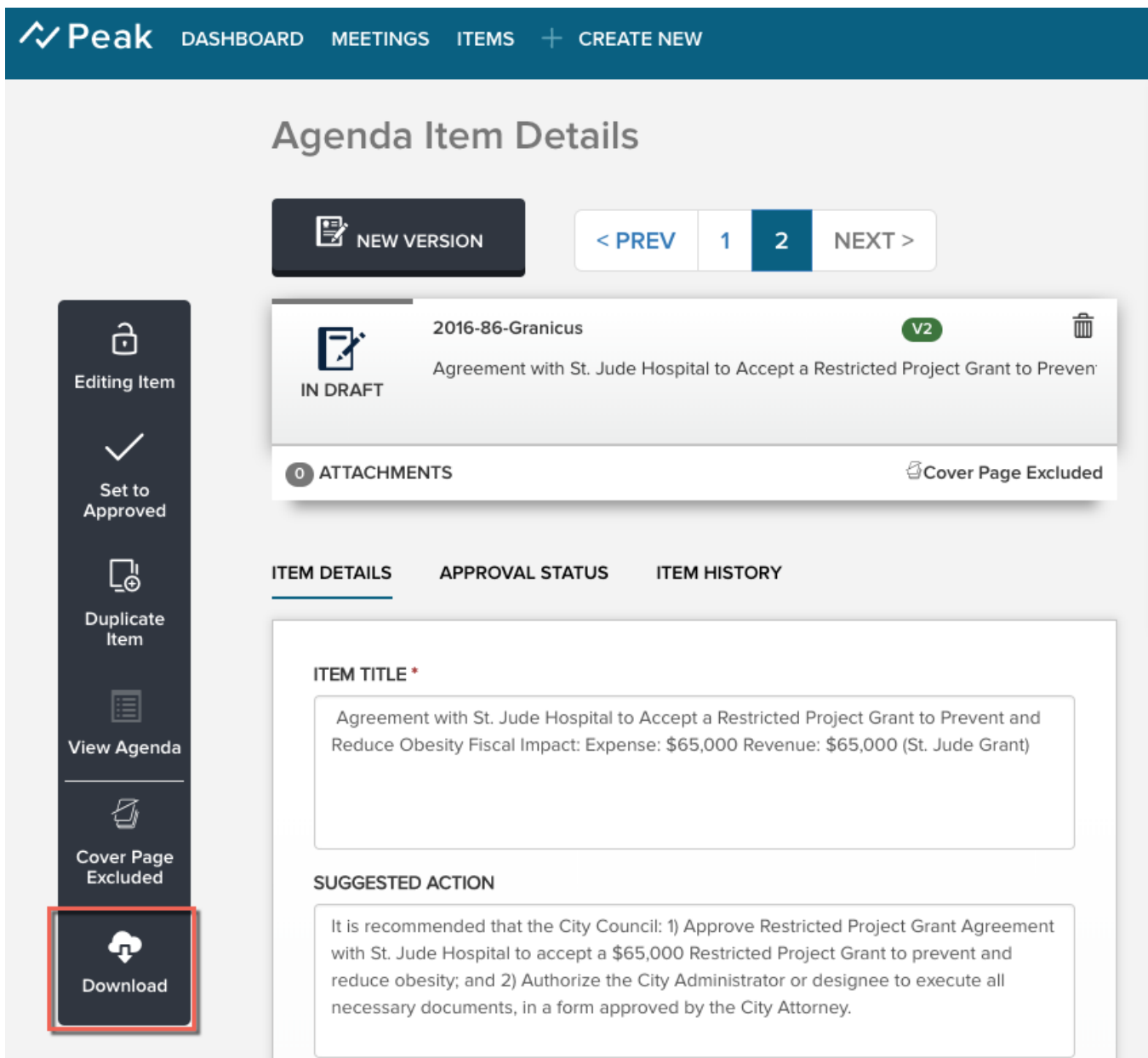
[>>> Next: Generating Agenda Item Packets](#)

[Return to Peak help topics](#)

Generating Agenda Item Packets in Peak

Administrators, Agenda Coordinators, and Drafters can generate an agenda item packet for a given agenda item. Packets can be created for the public or for council and will contain the cover page along with attachments as ordered on the agenda item. You can generate this packet from the Agenda Item Details page using the toolbar on the left side of the page.

1. From the Agenda Item Details page, click **Download** in the toolbar on the left.



Peak DASHBOARD MEETINGS ITEMS + CREATE NEW

Agenda Item Details

NEW VERSION < PREV 1 **2** NEXT >

2016-86-Granicus **V2** 

IN DRAFT Agreement with St. Jude Hospital to Accept a Restricted Project Grant to Preven

0 ATTACHMENTS  Cover Page Excluded

ITEM DETAILS APPROVAL STATUS ITEM HISTORY

ITEM TITLE *

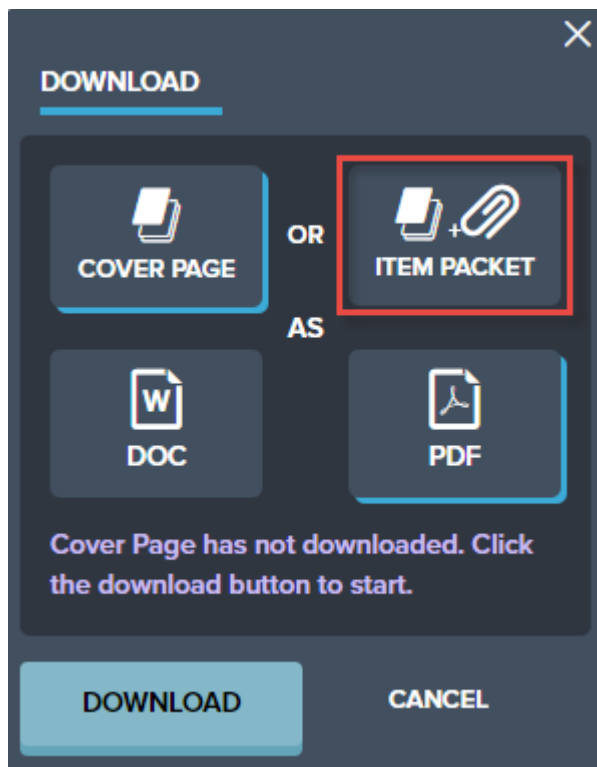
Agreement with St. Jude Hospital to Accept a Restricted Project Grant to Prevent and Reduce Obesity Fiscal Impact: Expense: \$65,000 Revenue: \$65,000 (St. Jude Grant)

SUGGESTED ACTION

It is recommended that the City Council: 1) Approve Restricted Project Grant Agreement with St. Jude Hospital to accept a \$65,000 Restricted Project Grant to prevent and reduce obesity; and 2) Authorize the City Administrator or designee to execute all necessary documents, in a form approved by the City Attorney.

Download

- The download popup menu displays, giving you the option to download a cover page only (in DOC or PDF format), or an item packet with attachments. Click **Item Packet**.



- Select whether you'd like to generate packet for the public, with public attachments only, or a packet for council, which will also include attachments marked as **Private**.

Note: The attachment indicator below the **Generate Packet** button will show you whether all non-PDF attachments on agenda items belonging to this agenda have been converted to PDF. It will also indicate whether PDF attachments are ready for collation.

- If the indicator is still red, a packet can be generated, but the agenda report/cover page report links for any attachments that have not yet converted will still link to the native form (e.g., DOCX) of the file
- Non-converted files and any PDFs that were flagged will not be collated with the packet

Click the indicator to see a list of files that have successfully converted and those that have not, and refresh the indicator until all files that are not ready have been marked as converted

DOWNLOAD

COVER PAGE OR **ITEM PACKET**

☒ **FOR PUBLIC** THIS WILL NOT INCLUDE ITEM ATTACHMENTS MARKED CONFIDENTIAL

☒ **FOR COUNCIL** THIS WILL INCLUDE ALL ATTACHMENTS

PUBLIC PACKET
HAS NOT BEEN GENERATED.

GENERATE PACKET

All attachments ready for packet generation.

Packet has not been generated. Click the generate button to start.

DOWNLOAD **CANCEL**

4. Click the **Generate Packet** button. Note that the **Download** button is not functional until your packet has generated.
5. Once the packet generation is complete, the text below the **Generate** button will let you know that the packet is ready for download, and the Download button will no longer be grayed out. Click **Download**.

DOWNLOAD

COVER PAGE OR ITEM PACKET

☒ FOR PUBLIC THIS WILL NOT INCLUDE ITEM ATTACHMENTS MARKED CONFIDENTIAL

☐ FOR COUNCIL THIS WILL INCLUDE ALL ATTACHMENTS

PUBLIC PACKET
LAST GENERATED: JANUARY 25, 2018

GENERATE PACKET

All attachments ready for packet generation.

Your item packet is now ready for you to download. Click the button below.

DOWNLOAD CANCEL

The packet generates as a PDF and contains the item's cover page (if set to be included) along with attachments as ordered on the agenda item.

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

The agenda item and each attachment are bookmarked in the packet. The bookmark title will depend upon which option is selected in Admin via the [drop-down menu on the Site Settings page](#). Pages in the item packet are numbered consecutively starting at **1** in the bottom right corner.

You can elect to have current approval workflow information display on the cover page report. This information includes the following:

- item state

- when the workflow was added
- when a phase was added
- when a user was added to a phase by an editor or by delegation
- whether an approver approved an item or was an FYI only
- whether a phase was skipped or completed normally

You can also elect to have agenda item numbers added to your cover page reports for those items that are associated with an agenda. Contact [Granicus Customer Care](#) to request samples of the available layouts if you'd like this information added to your cover pages.

Note: For full functionality with agenda packets, ensure that you do not have pop-up blockers enabled on your browser.

[<<< Previous: Amending an Agenda Item](#)

[>>> Next: Viewing the Dashboard](#)

[Return to Peak help topics](#)

Peak Activity Stream Automatic Notification Emails

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

Whenever a comment is added to an agenda item, the drafter-owner receives an email identifying who made the comment, the agenda item's ID and title, and the text of the comment. Whether other users receive notification is determined by whether an item contains an inflight workflow:

- During an inflight workflow, when a comment is made, email notification of this comment is sent to the drafter of the item, any previous commenters, and all approvers and FYlers in the current and previous phases of the workflow. Approvers and FYlers on future phases of the workflow who do not meet the aforementioned qualifications are not notified.
- If an item does not contain an inflight workflow, the drafter-owner or any person who has previously commented will receive an email when a comment is added.

A link is provided in the email, which when clicked will take the user to the agenda item.

[See here for automatic notification emails related to approval workflow.](#)

[Return to Peak help topics](#)

Peak Item History Tab

The Item History tab is found on the Agenda Item Details page for an agenda item and displays information on changes to the agenda item in ascending order starting with the item's creation. Each time an agenda item is updated, an entry is made.

Please note that the log will contain only those changes that occurred from the July 21, 2017, release forward. Historical data on existing agenda items created before this feature's release will not be available.


DASHBOARD MEETINGS ITEMS + CREATE NEW

Agenda Item Details

 NEW VERSION

 Editing Item

 Set to Approved

 Duplicate Item

 View Agenda

 Cover Page Included

 Download

 IN DRAFT

2016-212-Granicus
6 CCR 1015-3, Emergency Medical Services, Chapter 5, Air Ambulance Licensing.

V1

1 ATTACHMENTS
Cover Page Included

ITEM DETAILS APPROVAL STATUS **ITEM HISTORY**

granicus added attachment 'FSA-Eligible-Products-List.pdf' on: Tuesday, December 19th 2017, 12:10:11 pm

granicus created an approval workflow for this item: Tuesday, December 19th 2017, 12:10:39 pm

granicus made the following changes on: Tuesday, December 19th 2017, 12:10:41 pm:

- Changed: Phase - (the phase has been deleted)
Original Value: Pending
Updated Value: In Progress
- Changed: status
Original Value: Approved
Updated Value: In Review

Each entry under the tab contains the following:

- The date and time of update
- The name of the user who made the update
- The name of the updated field
- The original value
- The new value

Included Changes

Changes to the following are logged:

- All standard and custom fields, as well as changes to any attachments (privacy setting changes and added or deleted attachments) on an agenda item
- Item status changes (Draft/In Review/Approved) through workflow initialization, restart, or completion; or by manual action via the **Set To Approved** or **Set to In Draft** buttons
- Locking and unlocking of an item through manual action via the button, or by automated action (creating a new version or reaching final approval)
- Addition of a comment (if a comment is edited, the content of the comment will be updated on the corresponding creation entry for the comment)
- Workflow processing, including additions or deletions of approvers, workflow initialization, approval, delegation, phases complete or skipped, workflow complete, and workflow removed via restart workflow or remove template actions

Related updates are grouped under a common header—this includes changes that occur within a single save action and can be changes to multiple fields (standard and custom) and changes to attachments (level of privacy, name, order). Actions that do not require saving (adding, removing, replacing an attachment; including/excluding the cover page; locking/unlocking) are logged as separate events and are not grouped with other edits.

New Versions and Duplicate Items

If a new version of an item is created, the source version will log an entry that indicates the item is locked and that a new version has been created. The new version will contain a separate item history, which will begin with an entry indicating the new version's creation.

If a duplicate of an item is created, the source item will log an entry indicating the duplication. The duplicate agenda item will contain a separate and distinct item history, which will begin with an entry indicating the duplicate entry's creation.

Notes and Exceptions

For workflow processing, when an item is approved either by final approval or by skipping the final phase of a workflow, an item is automatically locked. These events are grouped together along with a state change of the final phase of the workflow. However, if the **Set to Approved** button is used, an item is also auto-locked. These will appear as separate events in the log. The auto-lock will appear in this case as initiated by the user when in fact it was completed automatically by the system. Even though the events are not grouped, the time stamps of the events can be used to coordinate dependent events.

Nothing is logged in the item history for renaming or reordering of phasing, but updated phase names are used in the item history for those events involving the phase. Adding or deleting a phase is not specifically logged, but addition of approvers to those phases are, as are deletion of approvers from a deleted phase. Since the workflow history is built each time the page is loaded, removing pre-existing workflows or phases on items will leave gaps in previous history events.

Peak Agenda Management: Approval Workflow

Read about Peak's Approval Workflow feature and learn how to set up and modify workflows.

Peak Workflow

[Setting Up Approval Workflows](#)

[Peak Approval Workflow Features](#)

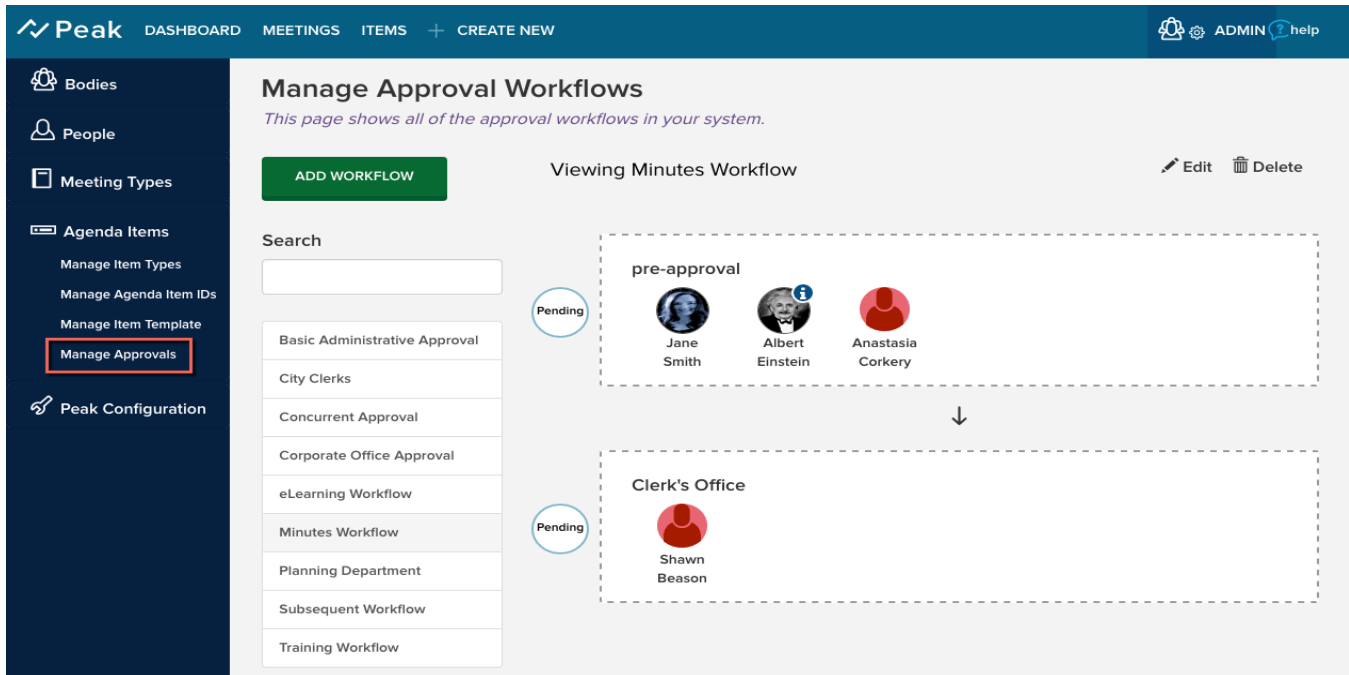
Email Notifications

[Approval Workflow Email Notifications](#)

Managing Approval Workflows

The [workflow functionality](#) in Peak enables agenda item drafters to create and submit their items through a sequential or concurrent workflow. Workflows can be set up while drafting agenda items via the Agenda Item Details page. Workflows can be deleted by Peak Admins only. Admins can also set up and edit workflows.

To manage workflows, click **Admin** in the upper right-hand corner. Choose **Agenda Items** from the menu on the left, then select **Manage Approvals**. **Note:** Only users with the Peak Admin role (or a platform administrator) will have access to the Admin portion of the application.



The screenshot shows the Peak Admin interface. The top navigation bar includes 'Peak', 'DASHBOARD', 'MEETINGS', 'ITEMS', and '+ CREATE NEW'. The right side of the top bar has 'ADMIN' and 'help' links. The left sidebar menu includes 'Bodies', 'People', 'Meeting Types', 'Agenda Items' (with sub-items: 'Manage Item Types', 'Manage Agenda Item IDs', 'Manage Item Template', and 'Manage Approvals' which is highlighted with a red box), and 'Peak Configuration'. The main content area is titled 'Manage Approval Workflows' with a subtitle 'This page shows all of the approval workflows in your system.' Below the title is a green 'ADD WORKFLOW' button. To the right of the button is the title 'Viewing Minutes Workflow' and 'Edit' and 'Delete' icons. A search bar is located below the 'ADD WORKFLOW' button. A list of workflows is shown on the left, including 'Basic Administrative Approval', 'City Clerks', 'Concurrent Approval', 'Corporate Office Approval', 'eLearning Workflow', 'Minutes Workflow' (highlighted), 'Planning Department', 'Subsequent Workflow', and 'Training Workflow'. The main area displays the 'Viewing Minutes Workflow' diagram, which consists of two steps: 'pre-approval' and 'Clerk's Office'. The 'pre-approval' step is marked 'Pending' and shows three users: Jane Smith, Albert Einstein, and Anastasia Corkery. The 'Clerk's Office' step is also marked 'Pending' and shows one user: Shawn Beason. A downward arrow indicates the flow from the first step to the second.

1. To add a workflow, click the green **Add Workflow** button. The following fields display:

Manage Approval Workflows

This page shows all of the approval workflows in your system.

ADD WORKFLOW

Search

- Basic Administrative Approval
- City Clerks
- Concurrent Approval
- eLearning Workflow
- Minutes Workflow
- New Approval

Editing New Approval

Assign Workflow To: ☐ User ☐ Department

Heads up: Approval workflows without an owner are available to all Drafters and Coordinators

Approval Name
New Approval

Approval Description
Please enter an Approval Description

Pending

You must give this phase a name.

You must have at least one approver in a phase.

Delete

2. Decide whether this workflow should be assigned to an individual or departmental owner by selecting the **User** or **Department** radio button. Leave these deselected if you want the workflow available to all. Click **Clear** if you've selected a button and want to deselect it.

If a workflow is assigned to an individual, the workflow will be available only to that user. If a workflow is assigned to a department, the workflow will be available only to users who are part of the department (users can be associated to a department via [People records](#)).

Editing Corporate Office Approval

Assign Workflow To: ☐ User ☒ Department [Clear](#)

Select Department:

Clerk's Office

Delete

If you do not assign the workflow an owner, it will be available to all Drafters and Agenda Coordinators.

3. Add a name for your workflow in the **Approval Name** field. The workflow is named "New Approval" by default. You can also enter a description of the workflow in the **Approval Description** field.

Editing Corporate Office Approval  Delete

Assign Workflow To: ☐ User ☒ Department [Clear](#)

Select Department:

Mayor's Office ▼

Approval Name

Corporate Office Approval

Approval Description

Please enter an Approval Description

4. To create your first phase, click the **pencil** icon in the corner of the unnamed phase.

Pending

You must give this phase a name.

You must have at least one approver in a phase.

5. Click the **Phase Name** field and type a name for the first phase. Then click the **Add Approver** button.

Pending

Phase Name  

1 - Pre-approval

239 characters left

 **ADD APPROVER**

You must always have at least one approver in a phase. If you need to remove this approver, please add another first.

6. Select the name of your first approver from the drop-down menu. You can also type directly in the field to narrow the choices. Choose whether you want this person to be an **Approver** or **FYI Only** by clicking the corresponding button. FYI Only are people who are a part of the workflow but are not required to approve the file; they'll be able to view details of the agenda item, including attachments, for informational purposes. Click the green **Add** button to add the selected approver.

Phase Name

1 - Pre-approval

239 characters left

Approver FYI Only

Add Approver

Barry Johnson
barryj@granicus.com

Brandon Weninger
brandon.weninger@granicus.com

ADD

Cancel

Pending

7. The approver's name and avatar now display on the phase. You can add multiple approvers to a single phase, or use one approver on each phase to create a specific sequence for the workflow to follow. Repeat step 4 to add more approvers to this phase. You can delete approvers using the red **x** on the associated avatar. When you're done with the first phase, click the green **checkmark** in the upper right-hand corner of the phase box.

Phase Name

1 - Pre-approval

239 characters left

ADD APPROVER

Marisa Rodriguez

Jane Smith

Pending

8. To add another phase, click the **plus sign (+)** underneath an existing phase.

1 - Pre-approval

Marisa Rodriguez

Jane Smith

Pending

9. Once a phase is added, you can use the **pencil**



to edit it, the **arrows**



to drag and drop into a new order, and the **trash can**



to delete.

10. When you've added all the phases you need, click the green **Save** button at the bottom right of the page.

Editing Corporate Office Approval

Delete

Assign Workflow To: ☐ User ☒ Department [Clear](#)

Select Department:

Mayor's Office

Approval Name

Corporate Office Approval

Approval Description

Please enter an Approval Description

Pending

1 - Pre-approval

Marisa Rodriguez

Jane Smith

2 - Clerks' Office

Shawn Beason

Gertrude Stein

Albert Einstein

CANCEL

SAVE

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316
112

The new approval workflow displays in the list of workflows on the left. It will also be available in the **Select a workflow** drop-down menu under the approval status of an agenda item. If it is not assigned an owner, it will be available to everyone; if it has an owner, it will display to the person assigned or to the members of the department assigned.

You can also edit and delete workflows from this page. Click the name of the workflow in the list, then click **Edit** or **Delete** in the upper right-hand corner to take the desired action.

Manage Approval Workflows

This page shows all of the approval workflows in your system.

ADD WORKFLOW

Viewing Corporate Office Approval

 Edit
  Delete

Search

Basic Administrative Approval

City Clerks

Concurrent Approval

Corporate Office Approval

eLearning Workflow

Minutes Workflow

Planning Department

Subsequent Workflow

Training Workflow

Pending

1 - Pre-approval

 Marisa Rodriguez
  Jane Smith

↓

Pending

2 - Clerks' Office

 Shawn Beason
  Gertrude Stein
  Albert Einstein

If you choose to delete a workflow, you'll get a confirmation message that allows you to cancel if you clicked **Delete** in error.

Deleting this approval workflow will remove it from Peak. You will no longer be able to select this approval workflow for agenda items.

Are you sure you'd like to delete this approval workflow?

DELETE WORKFLOW

No, Cancel

Note: Neither deleting nor editing a template will affect any historical data, i.e., it will not affect the workflow for current or past agenda items using a workflow that has since changed or been eliminated. The changes are available for use on

subsequent approval workflows, but in-process workflows will remain the same unless stopped and assigned a new workflow.

Automatic emails are sent to participants in an approval workflow. [Read details about notification emails.](#)

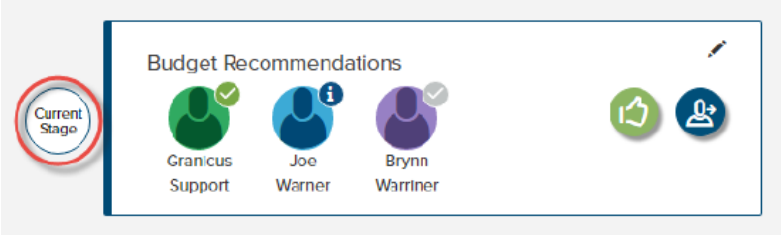
[<<< Previous: Customizing the Item Template](#)

[>>> Next: Configuring Site Information](#)

[Return to Peak help topics](#)

Peak Approval Workflow Features

The [workflow functionality](#) in Peak enables drafters to create and submit an agenda item through a sequential or concurrent workflow. The table below outlines key features of the review process:

Feature	Description
	Approval phases allow you to create sequential or parallel workflows. Each phase has to be completed before it moves to the next phase. The circle on the left indicates whether the stage is Current, Approved, or Skipped.
Approval phases	
	Approvers are people assigned to approve an item. Everyone assigned to a phase must approve before that phase is considered complete. The checkmark icon above the avatars indicates whether the person has approved the item: green indicates approval; gray indicates waiting on approval.
Approvers	
FYI	FYI approvers are users that are assigned to the workflow for informational purposes but are not required to approve the item. They are denoted by the blue-and-white i icon above the avatar.



Skip To Next

The **Skip to Next** option allows the current Drafter of the item, an Agenda Coordinator, or a Peak Admin to skip the current phase. This action bypasses any remaining approvers in the current phase and generates emails informing them that their approval is no longer needed. The workflow moves to the next phase.

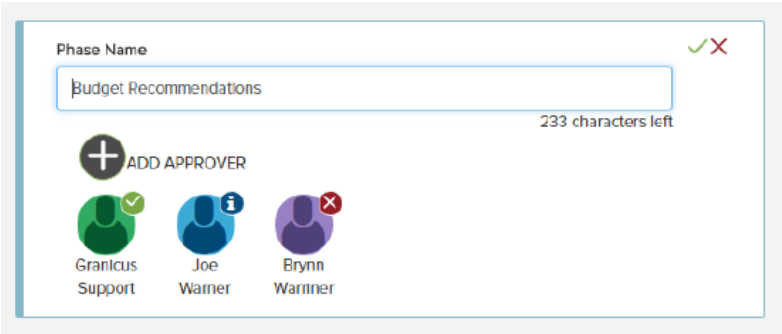


You can edit current and subsequent workflow phases after the workflow has been initiated by clicking the **pencil** (



) in the upper right-hand corner of the phase box. The red **x** icon above an avatar allows you to delete any approvers who have not yet taken action. Click the **x** to remove the approver. Once approvers have approved an item, they can no longer be deleted. You can also add additional approvers by clicking **Add Approver**. When you're done editing, click the green **checkmark** to save your changes. Completed phases cannot be edited.

Edit In-flight Workflow



Approvers click the green **thumbs up** button to approve the item.

Thumbs Up button



Approvers click the blue **delegate** button to delegate their approval to another user.

Delegate button



To delegate your approval to another person, click the **delegate** button shown above. The modal shown below will open. Choose a delegatee from the drop-down menu, then click the green **Delegate** button. The new approver shows up in your place on the workflow phase, and the delegatee and drafter of the item will both receive emails informing them of the change.

Delegate modal

×

Select a delegatee from below and click the DELEGATE button.

Add Delegatee

▼

DELEGATE

Cancel

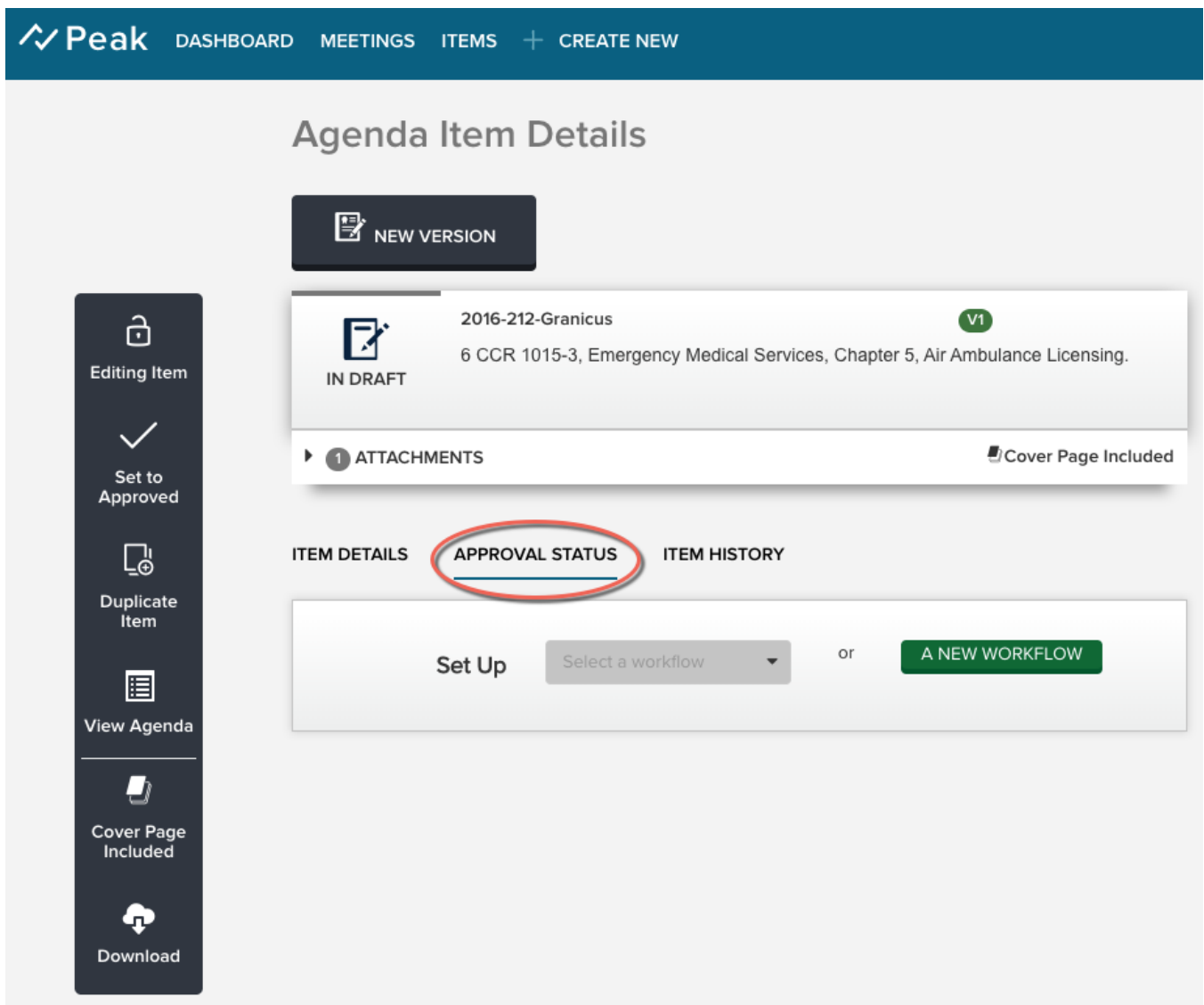
Peak sends emails throughout the workflow process to participants/assignees to request approvals and alert about various actions, e.g., an approval has been delegated, a phase is canceled, or an approver has been removed. [See specifics about Peak's automated workflow approval emails.](#)

[<<< Previous: Setting Up Approval Workflows](#)

[Return to Peak help topics](#)

Setting up Approval Workflows in Peak

Once you've [created an agenda item](#), you have the option to set up an approval workflow for it. There are two ways to set up approvals for a particular item: 1) when creating a new agenda item, and 2) when editing a previously created item. In either case, before you click the **Save Item** button, select the **Set up Approvals** checkbox. The approval workflow setup process will then initiate as soon as you click **Save**, and you'll go to this page. You can also arrive here by clicking directly on **Approval Status** just above the item details:



Peak DASHBOARD MEETINGS ITEMS + CREATE NEW

Agenda Item Details

NEW VERSION

IN DRAFT 2016-212-Granicus **V1**
6 CCR 1015-3, Emergency Medical Services, Chapter 5, Air Ambulance Licensing.

ATTACHMENTS Cover Page Included

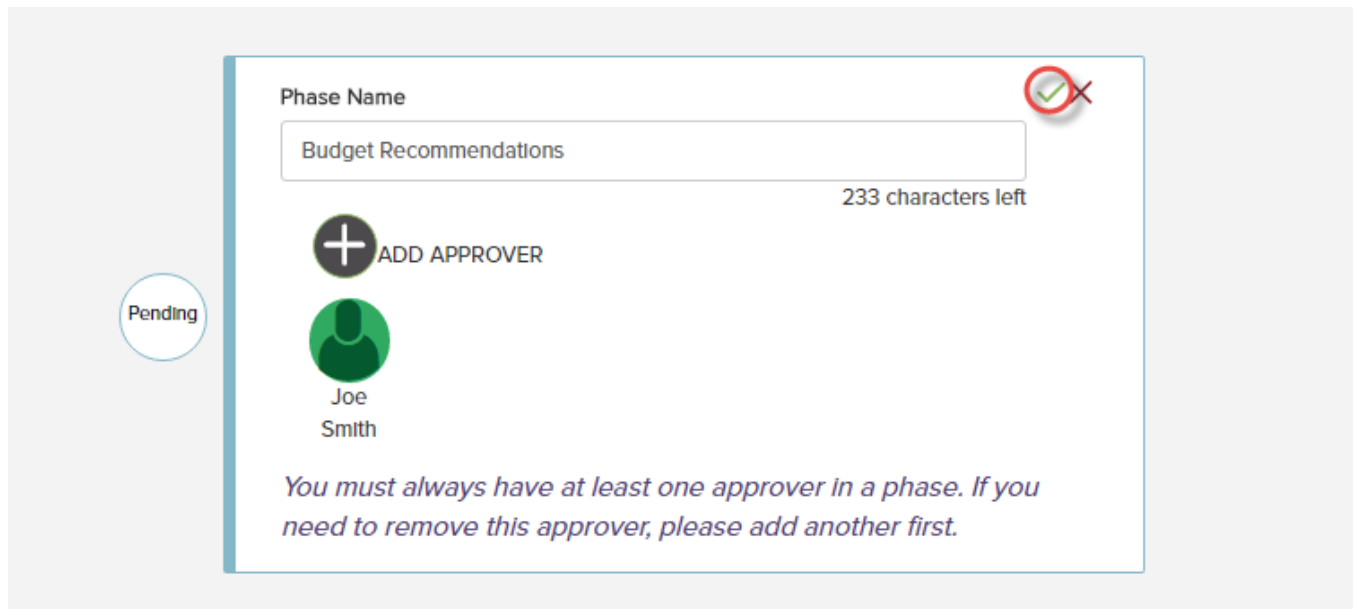
ITEM DETAILS **APPROVAL STATUS** ITEM HISTORY

Set Up Select a workflow or **A NEW WORKFLOW**

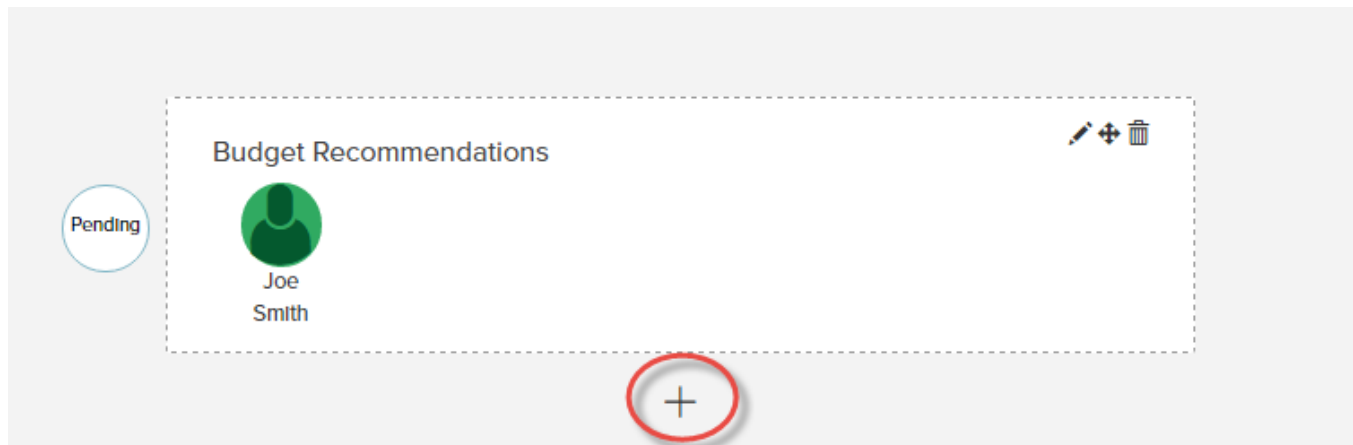
1. Decide whether you want to use a saved workflow or set up a new one.
 - To select an existing workflow, click the **Set Up** drop-down menu and choose the workflow you want to reuse. You can edit an existing template, but you must then save it as a new workflow if you want your updated version to be available for future use. [Workflow templates can be deleted only by a Peak Admin](#) via **Admin > Agenda Items > Manage Approvals**.
 - To add a new workflow from scratch, click the green **A New Workflow** button.
2. The workflow is broken up into phases. Click the **Phase Name** field, then type a name for the first phase. Then click the **Add Approver** button.

3. Select the name of your first approver from the drop-down menu. Then choose whether you want this person to be an **Approver** or **FYI Only** by clicking the corresponding button. FYI Only are people who are a part of the workflow but are not required to approve the file; they'll be able to view details of the agenda item, including attachments, for informational purposes. Click the green **Add** button.

4. The approver's name and avatar now display on the phase. You can add multiple approvers to a single phase, or just use one approver on each phase to create a specific sequence for the workflow to follow. Repeat step 3 to add more approvers to this phase. When you're done with the first phase, click the green **checkmark** in the upper right-hand corner of the phase box.



5. To add another phase, click the **plus sign (+)** underneath an existing phase.



6. Once a phase is added, you can use the **pencil**



to edit it, the **arrows**

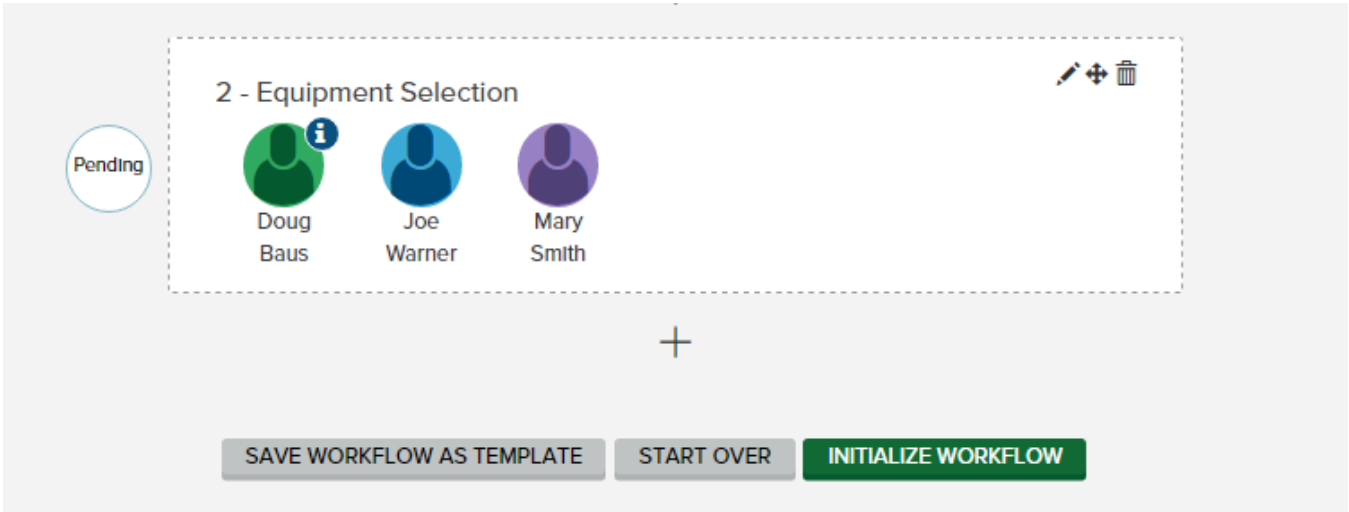


to drag and drop into a new order, and the **trash can**



to delete.

7. When you've added all the phases you need, you can choose to save this workflow as a template for future use. To save the workflow for future use, click the **Save Workflow as Template** button. If you want to scrap your work and start again, click the gray **Start Over** button. No changes will be saved if you choose to start over.



7a. You will be then be able to click the **Template Name** field and give your workflow a name. Click **Save Template**.

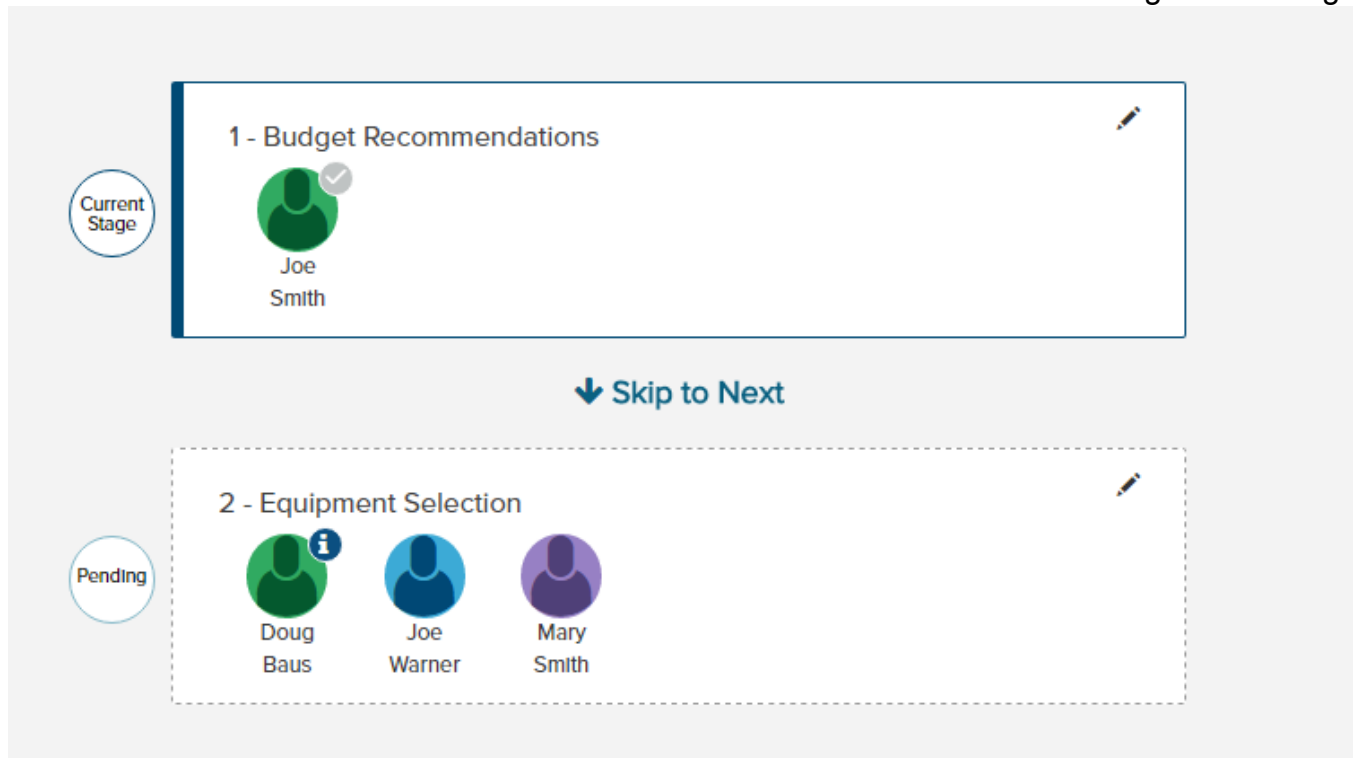
Template Name

Name your template

SAVE TEMPLATE

Cancel

8. To initialize the workflow, click the green **Initialize Workflow** button.



The [approval workflow is now in review](#). Emails will be automatically sent to the approvers informing them that an agenda item requires their approval. Peak uses automated emails to alert the item's drafter and participants to various other workflow actions as well. [See specifics about Peak's automated workflow notification emails](#).

Note: Workflows can be [deleted only by Peak Admins](#) via the **Admin > Agenda Items > Manage Approvals**. [Admins can also assign workflows an individual or departmental owner](#), which will limit who has access to them. If you create a workflow here, for example, that you do not want anyone else to be able to use, contact your Peak Admin to assign you as the owner of the workflow; it will then display in the menu only for you.

[<<< Previous: Viewing the Dashboard](#)

[>>> Next: Approval Workflow Features](#)

[Return to Peak help topics](#)

Peak Approval Workflow Automatic Email Notifications

Approval workflows use automated emails, which are sent to participating individuals after actions are taken in the workflow. The following table indicates who receives an email after which actions and gives the name of the corresponding email template. You can read the text of the emails below the table. [See here for automatic emails related to comments in the activity stream.](#)

Action	Who Receives the Email	Email Template Used (see below)
Workflow is initiated	All approvers and FYlers assigned to the first phase of the workflow	Approval Request FYI
Approver is removed	Any approver removed from the current active phase	Approver Removed
Workflow phase has been completed	All approvers and FYlers assigned to the following phase of the workflow	Approval Request FYI
Workflow has been canceled	All approvers in the current and previous phases	Workflow Canceled
Approval has been delegated to another user	Drafter of the item and the delegatee	Approval Request Delegated
Workflow phase has been skipped	All approvers in the skipped phase	Phase Skipped
Workflow is complete	Drafter of the item	Workflow Approved

Email Templates

Variables are indicated by text in brackets [].

Approval Request:

Subject: You've been asked to approve an agenda item

Hello [Approver]

[Agenda Item Type] [Agenda Item ID] has been submitted by [Drafter] for your review and approval. The target meeting for this item is for the [Meeting Body] meeting on [Agenda Date]. The description is as follows:

[Agenda Item Title]

Please review this item at [URL for this Approver and Item].

This email is an automatic email notice from your Peak Agenda Workflow System. Please do not 'Reply' to this email, but use the link above. Thank you.

FYI

Subject: FYI - An item has been submitted

Hello [FYler]

This email notice is For Informational Purposes Only.

[Agenda Item Type] [Agenda Item ID] has been submitted for approval. The description is as follows:

[Agenda Item Title]

To view the item please go to [URL for this FYler and Item]

This email is an automatic email notice from your Peak Agenda Workflow System. Please do not 'Reply' to this email, but use the link above. Thank you.

Approval Request Delegated

Subject: You've been asked to approve an agenda item

Hello [Approver]

[Agenda Item Type] [Agenda Item ID] has been delegated to you by [Approver who delegated] for your review and approval. The target meeting for this item is for the [Meeting Body] meeting on [Agenda Date]. The description is as follows:

[Agenda Item Title]

Please review this item at [URL for this Approver and Item].

This email is an automatic email notice from your Peak Agenda Workflow System. Please do not 'Reply' to this email, but use the link above. Thank you.

Workflow Canceled

Subject: Your approval is no longer required

Hello [Approver]

[Agenda Item Type] [Agenda Item ID] approval review has been cancelled. Your review of this item is no longer required.

This email is an automatic email notice from your Peak Agenda Workflow System. Please do not 'Reply' to this email. Thank you.

Workflow Approved

Subject: Your item has been approved

Hello [Drafter]

The proposed [Agenda Item Type] [Agenda Item ID], which you submitted to one or more persons for review and/or approval has been approved for the [Agenda Date] [Meeting Body] meeting.

This email is an automatic email notice from your Peak Agenda Workflow System. Please do not 'Reply' to this email. Thank you.

Phase Skipped

Subject: Your approval is no longer required

Hello [Approver]

Your review of [Agenda Item Type] [Agenda Item ID] is no longer required.

This email is an automatic email notice from your Peak Agenda Workflow System. Please do not 'Reply' to this email. Thank you.

Approver Removed

Subject: Your approval is no longer required

Hello [Approver]

Your review of [Agenda Item Type] [Agenda Item ID] is no longer required.

This email is an automatic email notice from your Peak Agenda Workflow System. Please do not 'Reply' to this email. Thank you.

[Return to Peak help topics](#)

Peak Agenda Management: Getting Started

Here you can learn the basics of logging in and navigating the application.

	What is Peak?
Getting Started	Logging in to Peak
	What if I don't get my welcome email?
Navigation	Navigating Peak Agenda Management
	Viewing the Dashboard

Logging in to Peak

When a Granicus Platform Administrator creates a user account for you, Peak will send you a welcome email containing the following:

- Your jurisdiction's URL
- Your username
- A link to set your initial password
- Instructions on how to log in to Peak once you've set a password
- The user role you've been assigned in Peak and an explanation of what that role can do
- Links to the Granicus Help Center and online trainings

To create your password, click the **Set My Password** link in the body of the email:



Welcome To Peak Agenda Management!

Your job just got easier. Peak gives you the tools to create agenda items, build agendas, get approval on each, and generate agenda packets and other documents.

1. Here's your account information:

Domain: elearning.granicus.com

Username: **Elizabeth.Warriner**

Set your password

a. Click **SET MY PASSWORD** below; you'll be taken to the My Account section of the Granicus Platform.

b. Enter a new password in the **password** and **confirm** fields.

c. Click **Save**.

A rectangular button with a blue gradient and rounded corners, containing the text "SET MY PASSWORD" in white, uppercase, sans-serif font. The button is highlighted with a red rectangular border and a subtle drop shadow.

SET MY PASSWORD

2. Sign into Peak

a. Navigate to elearning.granicus.com.

b. Enter your **username** and **password** in the corresponding fields.

c. Click **Sign In**.

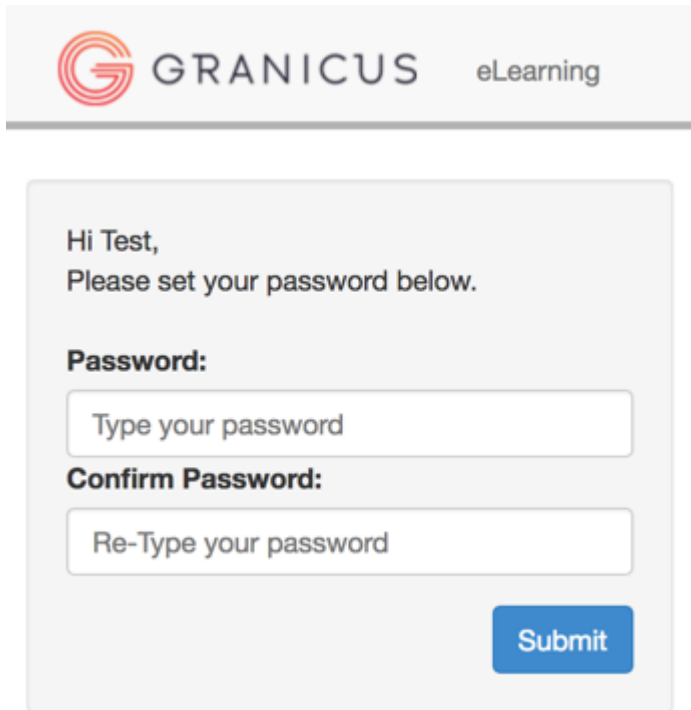
Note: You can always return to Peak from anywhere in the Granicus Platform by clicking the Apps menu in the upper right corner of the screen and selecting Peak.

3. More Information

Your role in Peak is: **Drafter**

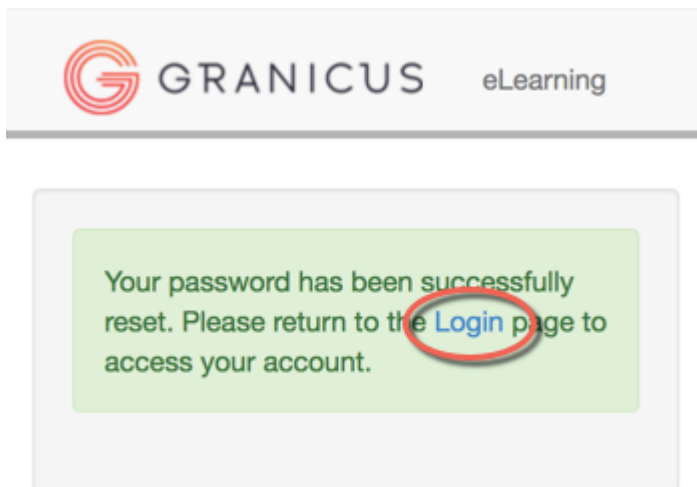
Drafter: This role has the ability to create and manage everything related to agenda items and agenda item workflow. A Drafter can also view agendas, along

You'll land on a page with two fields illustrated below. Enter the password you'd like to use in the **Password** field, then reenter the same password in the **Confirm Password** field. Your password will be case-sensitive. Click **Submit**.



The screenshot shows the Granicus eLearning logo at the top. Below it, a message reads: "Hi Test, Please set your password below." There are two input fields: "Password:" with the placeholder text "Type your password" and "Confirm Password:" with the placeholder text "Re-Type your password". A blue "Submit" button is located at the bottom right of the form.

If your passwords match, you'll be given the below message. Click the **Login** link.



The screenshot shows the Granicus eLearning logo at the top. Below it, a green message box contains the text: "Your password has been successfully reset. Please return to the [Login](#) page to access your account." The word "Login" is a blue hyperlink and is circled in red.

Enter the username as given in your welcome email, and the password you set on the previous page. The username will be your first and last names separated by a period. For example, **Jane.Smith**. Your username is not case-sensitive. Click **Sign In**.



Username:

Password:

[Forgot Password?](#)

— or —

[Sign In](#)

Use ActiveDirectory to [Sign In](#)

You'll land on your [Peak Dashboard](#).

► **What if I don't get my welcome email? How can I create a password and log in?**

[<<< Previous: What is Peak?](#)

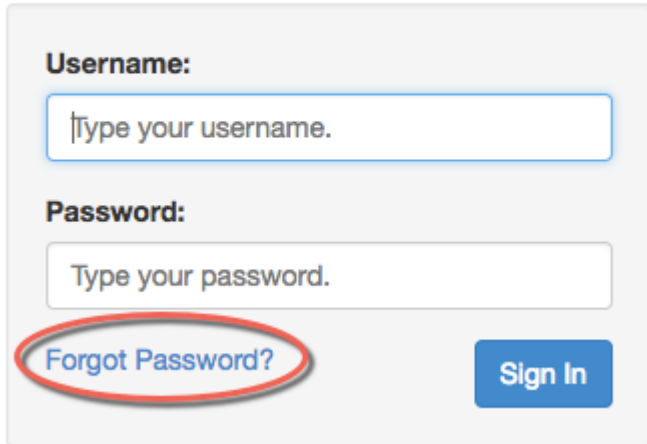
[>>> Next: Navigating Peak Agenda Management](#)

[Return to Peak help topics](#)

What if I don't get my Peak welcome email?

When your administrator gives you a username, the Peak system sends out an email with your username and a link to create your password. We recommend you check your junk or spam folder to make sure the email didn't end up there. If you can't find it, you can log in to Peak using the following workaround:

1. Navigate to [yourjurisdiction].granicus.com. For example, the city of Santa Barbara's URL would be santabarbara.granicus.com.
2. On the login page, there will be fields to enter your username and password. Below the **Password** field is a **Forgot Password** link. Click it.

The image shows a login form with two input fields: "Username:" and "Password:". Below the "Password:" field is a blue link that says "Forgot Password?". This link is circled with a red oval. To the right of the "Forgot Password?" link is a blue button that says "Sign In".

3. You'll land on a page with a field to enter your username. Your username is firstname.lastname. For example, Albert Einstein's username would be [albert.einstein](#). Enter your username in the field and click **Submit**.

Hi,
Please enter your username below and we
will email you a link to reset your password.

Username:

4. If you successfully submitted your username, you'll get the below message. Check your email inbox for an email from **noreply at granicus dot com**. The email will be titled "Granicus - MediaManager Password Recovery." Keep in mind that this message will go to the email address entered in the system, so if you don't get one, check with your Peak administrator to make sure the correct email address is on file.

Recovery email sent. Please check your email and follow the instructions to reset your account password. If you do not receive an email then please check your spam filter settings and/or verify that you entered the correct username.

5. Click the link in the body of the email.



noreply@granicus.com

4:10 PM (3 minutes ago) ☆

to me ▾

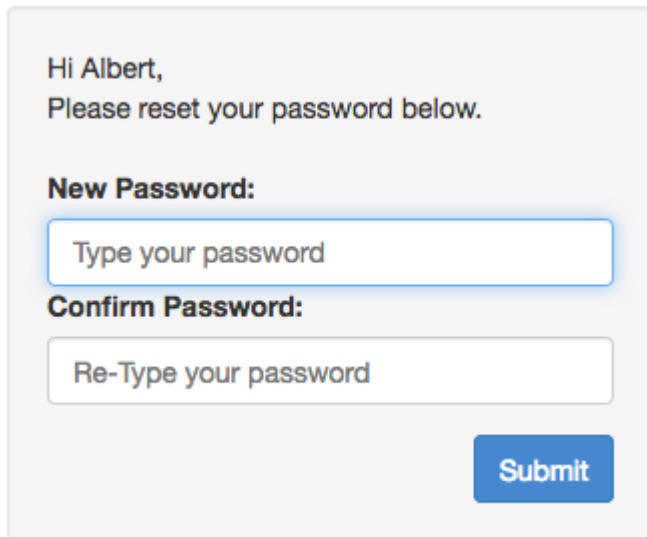
Hello Albert,

Please follow this [Link](#) to reset your password.

If you did not request a password reset then please contact your site administrator.

Thank you.

6. You'll be taken to a page with fields to type in a password. Even if you did not have a password before, you can set on here. Remember that passwords are case-sensitive. Type the password in the **New Password** and **Confirm Password** fields and click **Submit**.



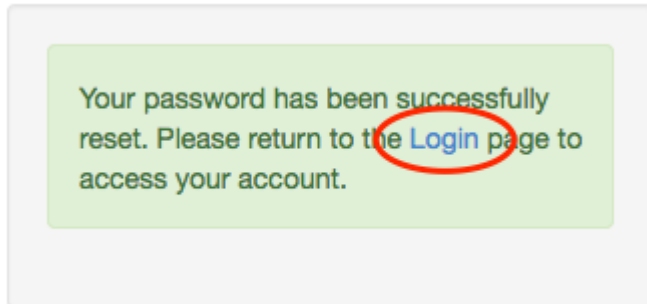
Hi Albert,
Please reset your password below.

New Password:

Confirm Password:

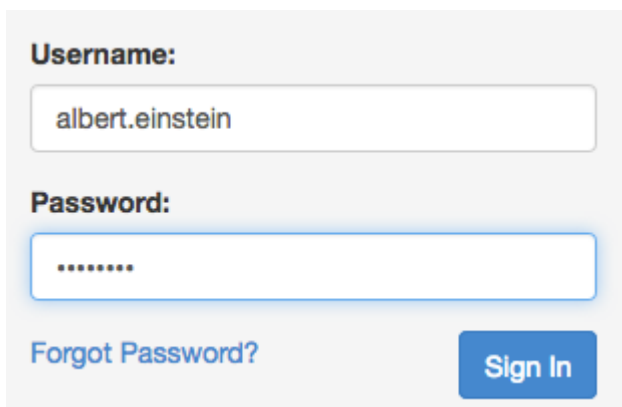
Submit

7. In the success message, click the **Login** link to return to the login page.



Your password has been successfully reset. Please return to the [Login](#) page to access your account.

8. You'll land back on the original login page. Enter your username and the password you just set in the fields, and click **Sign In**. You'll land on your [Peak Dashboard](#).



Username:

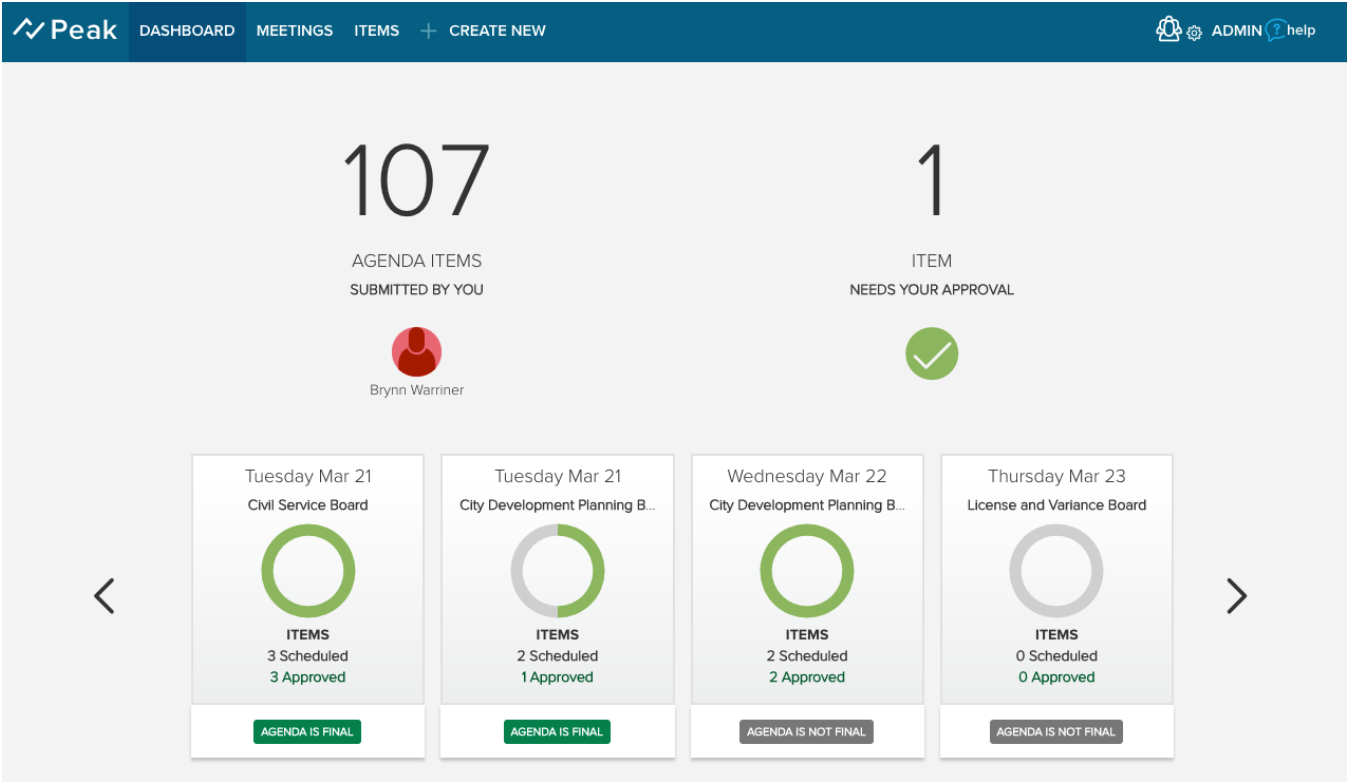
Password:

[Forgot Password?](#) **Sign In**

[Return to Peak help topics](#)

Navigating Peak Agenda Management

To access the Peak Agenda Management application, log in to your MediaManager site and click **Apps** in the upper right-hand corner. Select **Peak Agenda** from the drop-down menu. The [dashboard](#) is user-specific and will display as below:

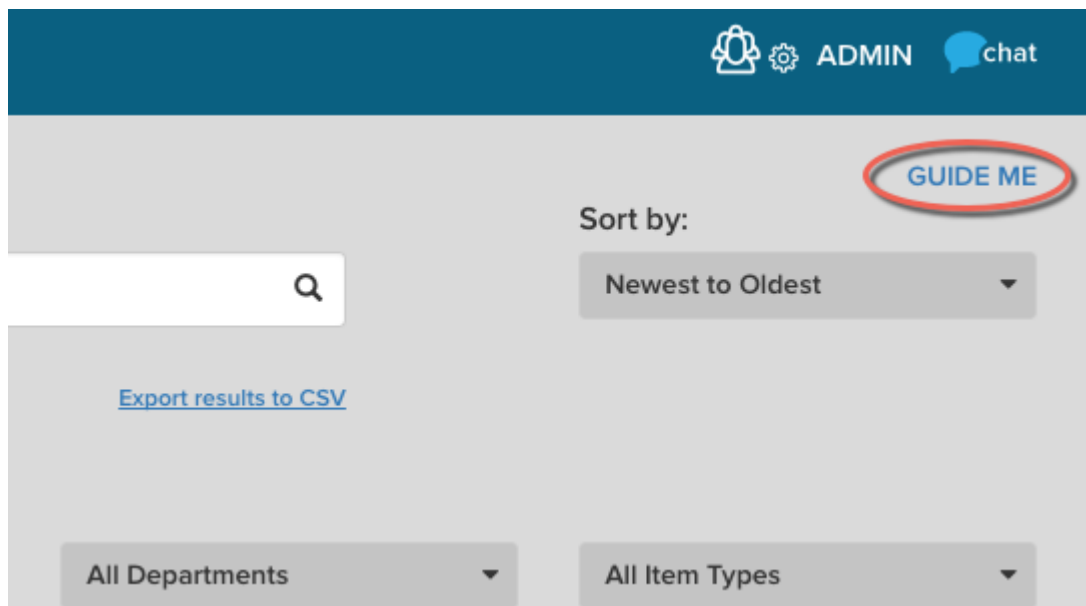


The navigation bar at the top of the page allows you to quickly access different areas of the application. The following table describes the tabs on the navigation bar and includes links to the help topics associated with each tab:

Area	Description
Dashboard	The dashboard will provide access to important data in the application. You can jump to recently submitted items, see the number of items needing your approval, and navigate to upcoming meetings .

Meetings	The Meetings page is where you will schedule , manage, and view all information related to meetings and agendas.
Items	The Items page is where you will have access to view and manage all the agenda items in the system.
Create New: Meeting	This is a shortcut in the navigation bar that takes you to the Create New Meeting page.
Create New: Agenda Item	This is a shortcut in the navigation bar that takes you to the Create New Agenda Item page.
Admin	The Admin page is where all configuration and data setup is performed for the application. You'll only see this if you have Peak Admin permissions .
Chat	Provides access to Peak's Live Chat feature if you need support.

Throughout Peak, you'll find links to the **Guide Me** in-app help feature in the upper right-hand corner of pages. This guide gives a concise, step-by-step tutorial on key features and functionality of each page without requiring you to leave Peak. Activate the guide by clicking the **Guide Me** link anywhere you see it in Peak.



Note also the **chat** button in the upper right-hand corner. Click to access our Live Chat feature, where you can ask a question if you need assistance with Peak. This chat button is accessible from any page in Peak. If no one is available to chat, the button will instead display as **help** and will bring you here to the Help Center.

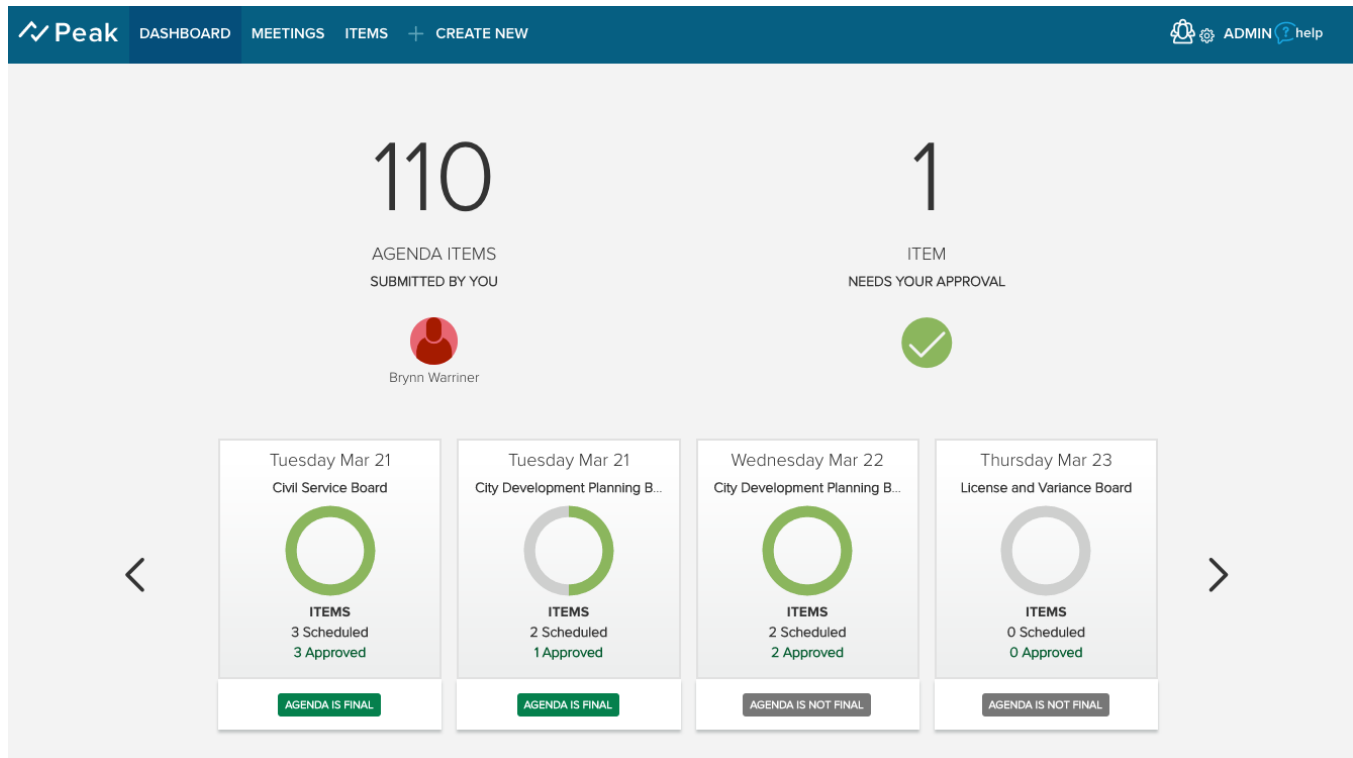
[<<< Previous: Logging in to Peak](#)

[>>> Next: Creating Departments](#)

[Return to Peak help topics](#)

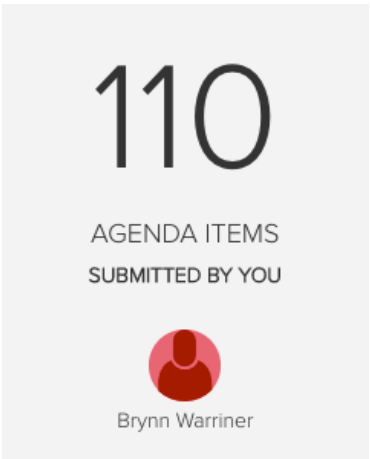
Viewing the Dashboard in Peak

The Peak dashboard will provide quick access to important data in the application. You can access your agenda items in draft, review, or final status as well those items needing your approval. You can also easily navigate to upcoming meetings. The Dashboard is user-specific and is the first page you see upon signing in to Peak. You can also get to it easily at any point by clicking **Dashboard** on the left side of the navigation bar.



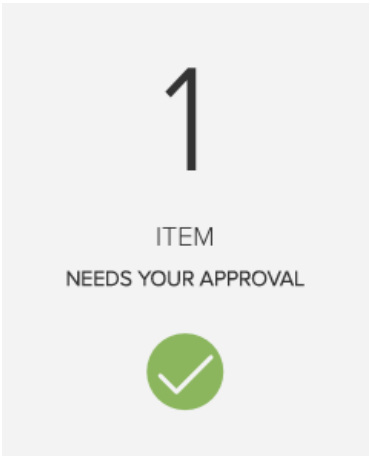
The dashboard page displays the following information:

Feature	Description
Submitted by You	This number displays the total number of items you have submitted that are in draft, review, or approved status. Click to access your agenda items.



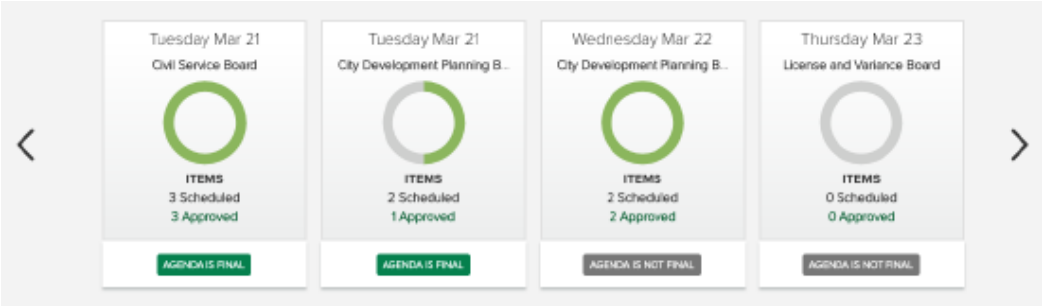
This displays the total number of agenda items awaiting your approval. Click to access the list of agenda items.

Needs Your
Approval



Meetings

This is a list of meetings arranged chronologically for the previous and upcoming six months (i.e., +/- six months from today's date). The status at the bottom of each meeting card shows whether the agenda is final. You can also see how many items have been scheduled for each meeting, and how many of those items have been approved. Approval progress is reflected in the green circles—a complete circle means all scheduled items have been approved. Click the arrows to navigate forward and back through the meetings, and click on any of the upcoming meetings in this list to be taken directly to that meeting's agenda. Note: Drafters can only click through to agendas that have a **final** status.



[<<< Previous: Editing Agenda Items](#)

[>>> Next: Setting Up Approval Workflows](#)

[Return to Peak Help Topics](#)

What is Peak?

Peak is a browser-based agenda management application that does not require a lot of training or configuration. With Peak you'll be able to digitally [create and manage agenda items](#), [create workflows](#) for agenda item approval, [schedule meetings](#), and create and distribute paperless [agenda packets](#).

To use Peak, you'll need one of the following browsers: Chrome, Firefox, Safari, or Internet Explorer. To see more technical requirements, including supported screen resolutions, see the [technical solutions guide](#) for Peak.

[>>> Next: Logging in to Peak](#)

[Return to Peak help topics](#)

Peak Agenda Management: Meetings

In the meetings section, you'll learn how to create and edit meetings and customize, download, and publish meeting agendas.

	Navigating the Meetings Page
Meetings	Creating Meetings
	Advanced Meeting Options
	Editing Meeting Details
	Editing Agenda Details
Agendas	Customizing Agenda Numbering
	Adding an Agenda Item on the Fly
	Downloading an Agenda
	Publishing an Agenda

Adding an Agenda Item on the Fly

When you are editing agenda details in Peak, you have the option to add an agenda item on the fly rather than going through the standard process to [create an agenda item](#).

1. To add an agenda item to the agenda your working with, click the **Add Item** button on the left-hand side of the [Edit Agenda Details](#) page.



MARCH 23, 2018

Small Business Council Meeting Agenda

General Meeting

The agenda is currently editable. To lock the agenda, click the Editing Agenda button on the toolbar to the left. You can add new agenda items and sections from the toolbar as well.

☒ Manual Agenda Numbering is On

Meeting Status: **DRAFT**

EXPAND ALL SECTIONS

1	▶ Roll Call	✚ 🗑
2	▶ Pledge of Allegiance	✚ 🗑
3	▶ Proclamations	✚ 🗑
4	▶ Recognitions	✚ 🗑
5	▶ Adoption of Agenda	✚ 🗑
6	▶ Public Comment	✚ 🗑
7	▶ Consent Agenda	✚ 🗑
8	▶ Presentations	✚ 🗑

2. The **Add an Agenda Item** modal will appear, as shown below. Select **Add Existing Items** to choose from existing agenda items, or **Create New** to create a new item from scratch.

ADD AN AGENDA ITEM

[ADD EXISTING ITEMS](#)
[CREATE NEW](#)

Sort by: **NEWEST TO OLDEST** Show: **ALL**

IN DRAFT

2016-107-Granicus
Small Business Council Initiatives

V2

☐ Select Item

0 ATTACHMENTS

Cover Page Included

IN DRAFT

2016-197-Granicus
Clerk to the Board Day 2017

V2

☐ Select Item

0 ATTACHMENTS

Cover Page Included

3. To add items from the list of available agenda items in the system, use the **Search Items** field to look for specific names, keywords, or agenda item IDs. You can also use the **Sort by** drop-down menu and select **Newest to Oldest**, **Oldest to Newest**, or **Item ID**; or filter the results by using the **Show** drop-down menu, which is populated by all the different **item types** in your system.

Sort by: **NEWEST TO OLDEST** Show: **HONORARY RESOLUTION**

4. Click the **checkbox** on the right-hand side of the item card for all the items you wish to add. Once you have checked the box, the **Select Section** drop-down menu appears below the checkbox. The menu is populated with the sections from the agenda you're working with. Add as many items at once as you need, selecting a section for each.

Peak Agenda Management

DASHBOARD MEETINGS ITEMS + CREATE NEW ADMIN

MARCH 23, 2018

Small Business Council Meeting Agenda

General Meeting

ADD AN AGENDA ITEM

The agenda is currently editable. To lock the agenda, click the Editing Agenda button on the toolbar.

ADD EXISTING ITEMS CREATE NEW You can add new agenda items and sections from the toolbar as well.

small busine Sort by: NEWEST TO OLDEST Show: ALL

EXPAND ALL SECTIONS

Add Section

1 Roll Call

2016-107-Granicus V3

IN REVIEW Small Business Council Initiatives

1 ATTACHMENTS Cover Page Included

2016 Budget Recommendations 49766.pdf

2016-107-Granicus

IN DRAFT Small Business Council Initiatives

0 ATTACHMENTS

Select Section

Select a Section

- Roll Call
- Pledge of Allegiance
- Proclamations
- Recognitions
- Adoption of Agenda
- Public Comment

4a. You can add the item to multiple sections by choosing additional options from the drop-down menu. To remove a section, click the **x** next to its name.

Peak Agenda Management

DASHBOARD MEETINGS ITEMS + CREATE NEW ADMIN

MARCH 23, 2018

Small Business Council Meeting Agenda

General Meeting

ADD AN AGENDA ITEM

The agenda is currently editable. To lock the agenda, click the Editing Agenda button on the toolbar.

ADD EXISTING ITEMS CREATE NEW You can add new agenda items and sections from the toolbar as well.

small busine Sort by: NEWEST TO OLDEST Show: ALL

EXPAND ALL SECTIONS

Add Section

1 Roll Call

2016-107-Granicus V3

IN REVIEW Small Business Council Initiatives

1 ATTACHMENTS Cover Page Included

2016 Budget Recommendations 49766.pdf

2016-107-Granicus

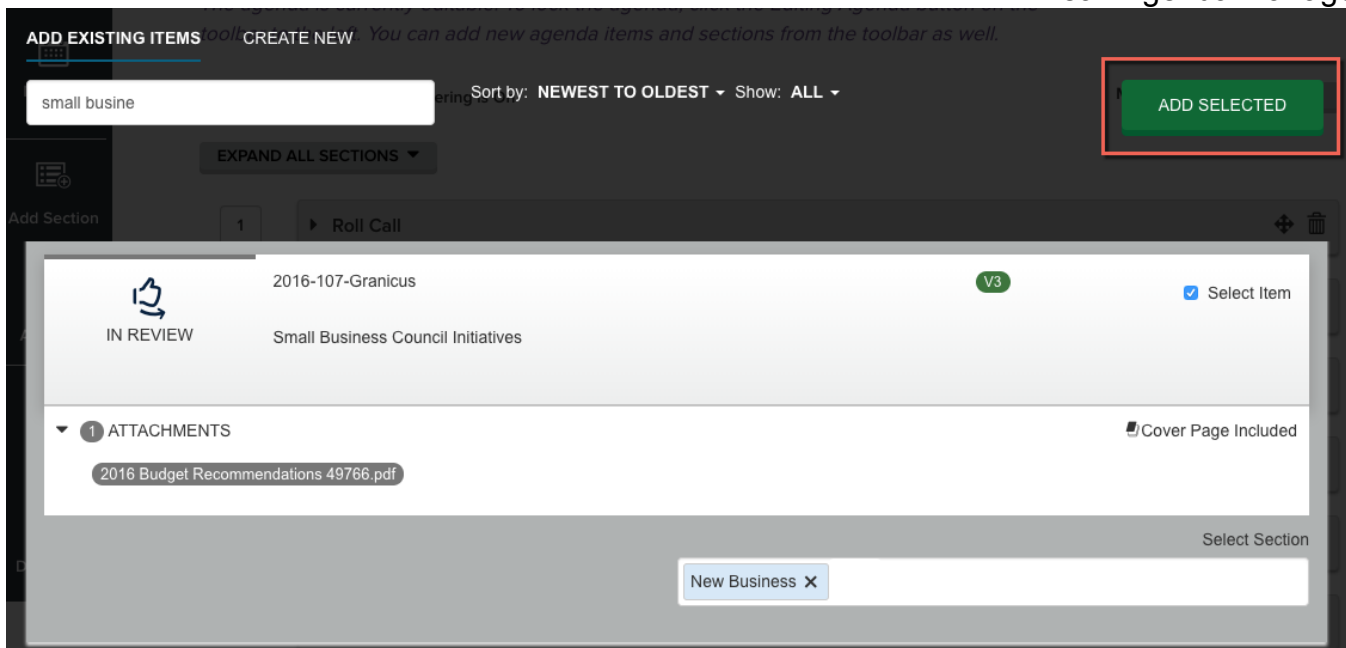
IN DRAFT Small Business Council Initiatives

0 ATTACHMENTS

Select Section

New Business x Public Comment x

5. Click **Add Selected** button to add the item to the agenda section or sections you've chosen.



6. The agenda item(s) now appear on the agenda. You can now [edit, rearrange, and remove items](#).

To add an item from scratch, go to step 2 and choose **Create New**. The process from here is the same as the standard process to [create an agenda item](#), except that the **Meeting Body** and **Meeting Date** fields will be filled with the information from the agenda you're working with:

ADD AN AGENDA ITEM

To lock the agenda, click the *Editing Agenda* button on the toolbar to the left. You can add new agenda items and sections from the toolbar as well.

ADD EXISTING ITEMS CREATE NEW

Meeting Details Manual Agenda Numbering is On Meeting Status: DRAFT

ITEM TITLE *

SUGGESTED ACTION

ITEM TYPE * **ITEM ID**

Select an Item Type Granicus-XXXX-2018

SUBMITTING DEPARTMENT **DRAFTER**

Select a Department Granicus Support

MEETING BODY **MEETING DATE**

Small Business Council March 23, 2018 06:00 PM

AGENDA SECTION *

Select a Section

CANCEL SAVE ITEM

Choose the appropriate agenda section or sections from the **Agenda Section** drop-down menu. Click the **Save Item** button, and your item displays on the agenda. To enter information into any [custom fields](#), add attachments, and create an approval workflow, click the **pencil** on the item card to [edit the agenda item](#) once you have added it.

Note: The item is added to the agenda and will be set automatically to Approved. This provides a quick and easy way to add an item to an agenda and bypass the workflow process. If you need a workflow on the item, use the **Set Status to In Draft** button, and [add a workflow via the item details page](#).

[<<< Previous: Customizing Agenda Numbering](#)

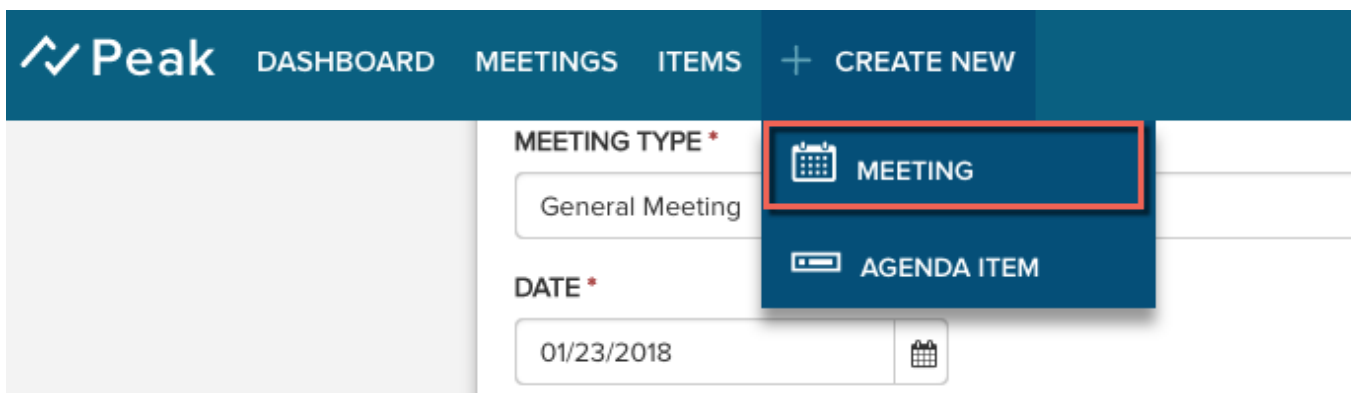
[>>> Next: Downloading an Agenda](#)

[Return to Peak help topics](#)

Creating a New Meeting in Peak

The Create New Meeting page allows you to schedule either one-time or recurring meetings. This functionality is available to users with Agenda Coordinator or Peak Admin roles.

1. To create a meeting, click **Create New** on the Peak navigation bar, then choose **Meeting**. You can also click **Add New Meeting** on the main [Meetings page](#).



The screenshot shows the Peak application interface. The top navigation bar includes 'Peak', 'DASHBOARD', 'MEETINGS', 'ITEMS', and a '+ CREATE NEW' button. A dropdown menu is open from the '+ CREATE NEW' button, showing two options: 'MEETING' (with a calendar icon) and 'AGENDA ITEM' (with a document icon). The 'MEETING' option is highlighted with a red rectangular box. Below the navigation bar, the 'MEETING TYPE' field is visible, with 'General Meeting' selected. The 'DATE' field shows '01/23/2018' and a calendar icon to its right. Red asterisks are placed next to 'MEETING TYPE' and 'DATE' to indicate required fields.

The following figure illustrates the Create New Meeting page for a one-time meeting. Red asterisks indicate required fields.

ONE TIME MEETING

RECURRING MEETING

MEETING BODY *

MEETING LOCATION

MEETING TYPE *

DATE *

01/23/2018

START TIME *

10:30 AM

END TIME *

11:30 AM

MEETING LENGTH

1 hour

ITEM SUBMISSION DEADLINE

CUTOFF TIME

DESCRIPTION

ADVANCED SETTINGS (Please first select a Meeting Body and Meeting Type)

2. Choose whether the meeting will be recurring or a single occurrence by clicking **One Time Meeting** or **Recurring Meeting**. By default, the page is set for a one-time meeting.
- 3a. Enter the details for your meeting. The table below describes the options for a one-time meeting:

Feature	Action

Meeting Body	Click the drop-down menu and select the body associated with this meeting. You can also begin typing the body name in the field to limit the menu options.
Meeting Location	Click the field, then add a meeting location. If the selected meeting body has a default meeting location set up, the field will automatically populate with this information.
Meeting Type	Select a meeting type from the drop-down menu. You can also begin typing in the field to limit the menu options. If the selected meeting body has a default meeting type set up, Peak will automatically select the meeting type.
Date	Click the Calendar icon  and select a date from the calendar. You can also type a date directly in the Date field with the format MM/DD/YYYY.
Time	Click the Clock icon  and select a time from the drop-down menus for meeting start and end times. The end time defaults to one hour later than the start time. You can also type a time in the field with the format H:MM AM/PM or HH:MM AM/PM. Meeting duration can be between 1 and 16 hours. If the selected meeting body has a default time set up, this information will automatically populate the Time fields.
Meeting Length	This automatically calculates once you fill in the start and end times.
Item Submission Deadline	Setting an item submission deadline restricts users with the Drafter role to assign agenda items to this meeting only up until its deadline. After the deadline has passed, the meeting date is no longer included in the drop-down menu on the Item Details page, at which point only Agenda Coordinators or Peak Admins will be able to add an agenda item to the agenda. Click the field and select a date from the calendar. This field defaults to blank if no date is selected.
Cutoff Time	Select the time at which agenda items can no longer be added to the agenda on the date specified in the Item Submission Deadline field. This field defaults to the nearest hour to the current time if no time is selected.
Description	Click the field, and then type a description of the meeting.

Note: There is no indicator on the calendar to differentiate between a meeting that is recurring and a single meeting. As the creator of the meeting, you might wish to place some text in the **Description** field to indicate whether this is a recurring meeting, e.g., "This is a city council meeting series scheduled every Monday from 5:30–6:30 pm from 11/1/2015 through 12/31/2016."

Advanced Settings

Advanced settings pertain to settings for events in the Granicus Platform (MediaManager) so that the applications can better talk to each other. You must have a meeting body and meeting type set for these settings to become available. [See here for more on the advanced setting options.](#)

3b. If you choose to create a recurring meeting, you will have additional options:

Feature

Action

Repeats

This option allows you to specify the pattern of recurrence for the meeting. Click the **Repeats** drop-down menu, then choose when the meeting will repeat: *Daily*, *Weekly*, *Monthly*, or *Yearly*.

If you selected a *Daily* meeting, click the **Every** field and type the number that indicates how often the meeting occurs. The meeting in the example below will take place every third day:

Daily

REPEATS *

Daily

EVERY *

3

days

Weekly

If you chose a *Weekly* meeting, click the **days of the week** buttons to choose when the meeting recurs. When the days of the week are blue, they are selected. Next, enter a number in the **Every** field to indicate how many weeks between meetings. The meeting in the example below will take place on Tuesdays and Fridays, every other week:

REPEATS *

Weekly

ON *

S

M

T

W

T

F

S

EVERY *

2

weeks

If you chose a *Monthly* meeting, click the weeks on which the meeting falls: 1st, 2nd, 3rd, 4th, or 5th week of the month. Then click the **Day** drop-down menu, and choose the day of the week the meeting will take place. In the **Every** field, choose how often the monthly meeting will occur. The meeting in the example below will take place on the 2nd and 4th Wednesday of every month:

Monthly

REPEATS *

Monthly

ON THE *

1st

2nd

3rd

4th

5th

DAY *

Wednesday

EVERY *

1

months

If you chose a *Yearly* meeting, click the **Every** field and specify how often the meeting will occur. The meeting in the example below repeats once a year on the first date specified in the **Recurrence Range** field:

Yearly

REPEATS *

Yearly

EVERY *

1

years

Click the **Calendar** icon

Recurrence Range



and select dates to create a range of dates for the meeting. In the example below, the meeting will repeat through the end of 2016:

RECURRENCE RANGE *

9/29/2015		-	12/31/2016	
-----------	---	---	------------	---

4. Click the green **Save** button to save your meeting details. The meeting now shows up on the Meetings page calendar.

[<<< Previous: Navigating the Meetings Page](#)

[>>> Next: Advanced Settings for Meetings](#)

[Return to Peak help topics](#)

Advanced Settings for Peak Meetings

To enable compatibility between a Peak meeting and its corresponding Granicus Platform (MediaManager) event, you can use the **Advanced Settings** button on the single and recurring Meeting Details form to open a variety of menus and options. This button becomes enabled after you select a meeting body and type, and clicking it will display the additional meeting/event options shown below.

ADVANCED SETTINGS ▲

MEDIA OPTIONS:

☐ Automatically start recording
 ☒ Broadcast event
 ☒ Record event
 ☒ Show on upcoming events

ENCODER

SalesDemo02Enc ▼

PLAYER TEMPLATE

No Template (Use Encoder Settings) ▼

ARCHIVE FOLDER

City Council ▼

ARCHIVE STATUS

Pending ▼

1. Select your media options using the four checkboxes:

Media Option	Description
Automatically Start Recording	Select this checkbox to automatically start the encoder to record the meeting at the specified date and time. This checkbox is deselected by default. If you don't select this option, you must manually start the encoder at the start of the meeting.
Broadcast Event	Select this checkbox to stream the event live on your view page. This checkbox is selected by default. If you don't select this option, the meeting will not display on the view page.

Record Event

Selecting this checkbox creates an archive (recording) of the event.
This checkbox is selected by default.

Show on upcoming events

Selecting this checkbox causes the meeting to display in the list of upcoming events on your view page.

2. Select an **Encoder** from the drop-down menu to be used for the meeting. The encoder is the server responsible for recording, streaming, and transferring media files to Granicus's cloud services (data center).
3. Select the **Player Template** from the drop-down menu. The Player Template is a preset design for the Player Page that the public uses to view your live meeting and associated meeting documents.
4. Select the **Archive Folder** where recordings of the meetings will be stored in the Granicus Platform after the meeting ends.
5. Select the **Archive Status** (this will be the status after upload). The default selection is **Pending**. The table below shows descriptions of the available statuses:

Status	Description
Pending	Allows an internal user to view and edit the archive and decide when to make it public
Public	Allows citizens to view the archive after uploading
Not Public	Prohibits citizens from accessing the archive after uploading

See the [Granicus Platform \(MediaManager\) user guide for Events](#) for more details on these fields.

Existing event settings will be transferred to the corresponding Peak meeting, but events created via the Granicus Platform cannot be examined in Peak until you set a Peak meeting status, meeting body, and meeting type. Changes to the data in either application (Peak or the Granicus Platform) will update data in the other application for the same event/meeting.

Note: Views Available and Views Assigned are not currently supported in Peak. Please see the corresponding event in the Granicus Platform to see which View Pages are associated to the Peak meetings. You'll need to do this to see where your agenda reports and packets go when you publish them to View Pages from Peak.

[<<< Previous: Creating a New Meeting](#)

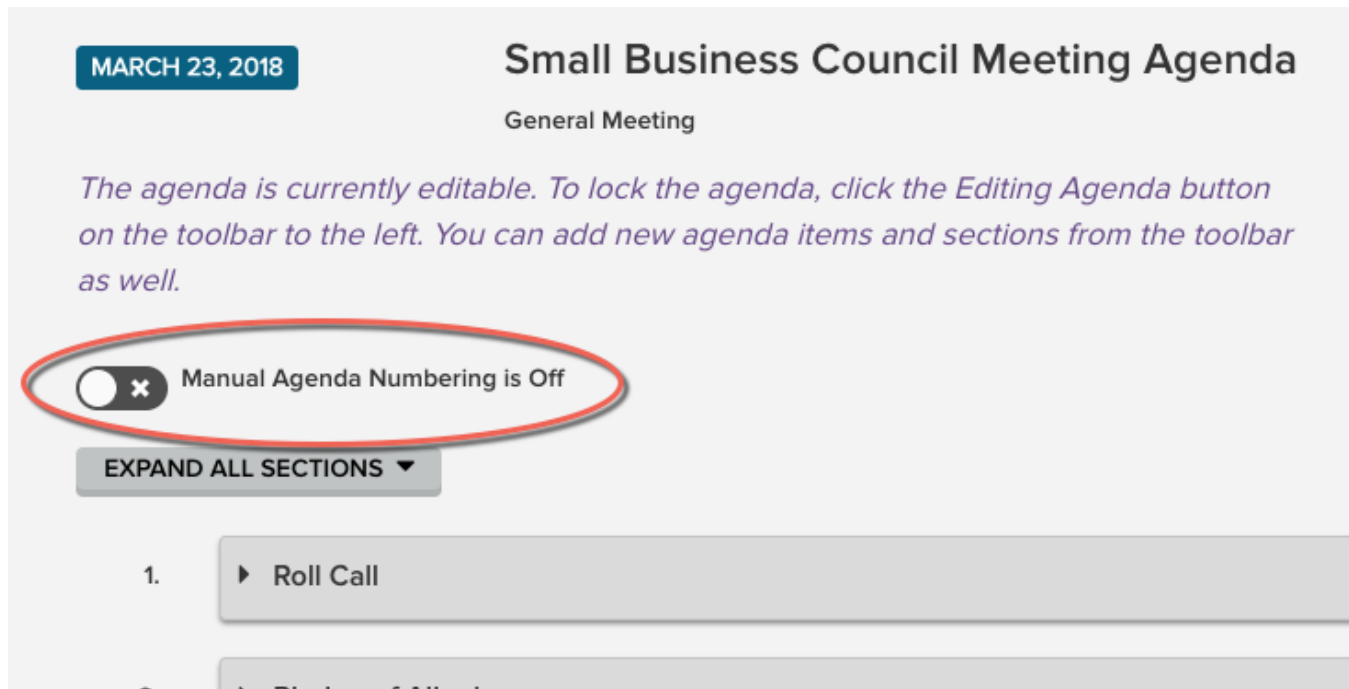
[>>> Next: Editing Meeting Details](#)

[Return to Peak help topics](#)

Customizing Agenda Numbering in Peak

Peak enables you to customize the numbering on your agenda sections and items. This feature allows for flexibility of numbering when the available default numbering schemes do not meet your needs or you need more variance of number format within a single agenda. To work with agenda numbering, navigate to the agenda you want to change via the meetings page or by clicking View Agenda on an associated agenda item.

1. To customize the section numbering of an agenda, click the **Manual Agenda Numbering** toggle switch to **On**. When the toggle is off, the standard numbering scheme associated with the meeting type is used.



2. When manual numbering is turned on, the section numbers display in fields to the left of each item. Click in the field, and type the desired number or combination of numbers and letters. You can use up to fifteen numerals, letters, spaces, and special characters in the fields.

☒ Manual Agenda Numbering is On

Meeting Status: **DRAFT**

EXPAND ALL SECTIONS

1

▶ Roll Call

2

▶ Pledge of Allegiance

3

▶ Proclamations

3. You can add or edit agenda item numbers in the same way.

9

▶ Public Hearings

10

▼ New Business

10a

2016-107-Granicus

Small Business Council Initiatives

IN DRAFT

V2

0 ATTACHMENTS

Cover Page Included

4. When you're finished making changes to both the section and item numbering, click the green **Save** button at the bottom right to apply the changes. If you attempt to navigate away from the page without saving, you will see a warning pop-up.

7

▼ Consent Agenda

7a

2016-86-Granicus

Agreement with St. Jude Hospital to Accept a Restricted Project Grant to Prevent and Redu

IN DRAFT

V2

▶ 2 ATTACHMENTS

Cover Page Included

You have unsaved changes

CANCEL

SAVE

Peak Agenda Management

The custom values you enter will publish in agenda reports and packets, as well as on published agendas on the platform, iLegislate, and view pages.

You can also add agenda item numbers to the cover page report. Contact [Granicus Customer Care](#) to request samples of the available layouts if you'd like this information added to your cover pages.

Note: When custom numbering is turned on, Peak does not automatically renumber sections when you drag and drop to reorder them.

[<<< Previous: Editing Agenda Details](#)

[>>> Next: Adding an Agenda Item on the Fly](#)

[Return to Peak help topics](#)

Downloading an Agenda in Peak

When you are editing agenda details in Peak, you have the option to download either the agenda alone or an agenda packet. You'll be able to choose between Word and PDF formats for your download.

1. To download the agenda you're working with, click the **Download** button on the left-hand side of the [Edit Agenda Details](#) page.



FEBRUARY 26, 2018

City Council Meeting Agenda

General Meeting

The agenda is currently editable. To lock the agenda, click the Editing Agenda button on the toolbar to the left. You can add new agenda items and sections from the toolbar as well.

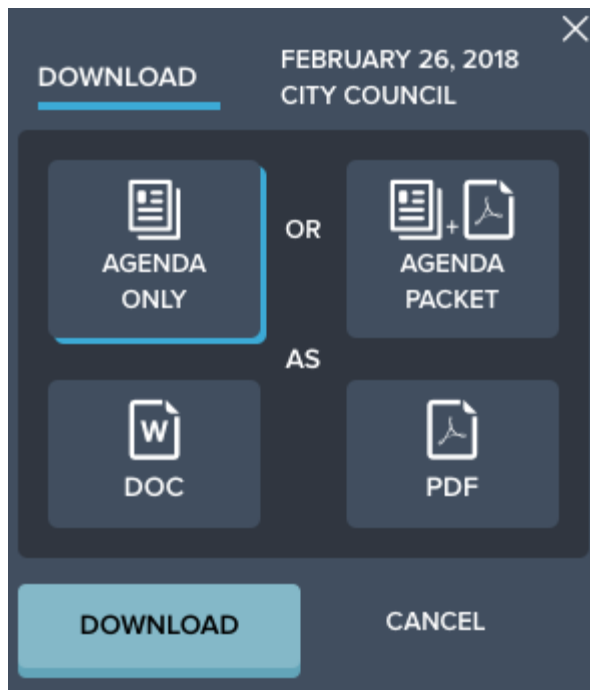
☒ Manual Agenda Numbering is Off

Meeting Status: **DRAFT**

EXPAND ALL SECTIONS

1. Roll Call
2. Pledge of Allegiance
3. Proclamations (1 AGENDA ITEM)
4. Recognitions (1 AGENDA ITEM)
5. Adoption of Agenda
6. Public Comment
7. Consent Agenda (3 AGENDA ITEMS)
8. Presentations

2. The **Download Agenda** modal will appear, as shown below. Select **Agenda Only** or **Agenda Packet** by clicking on the associated icon. Any RTF, TXT, DOC, XLS, PPT, or image file document attachments are converted to PDF and appended to the packet. Other file types will be included as hyperlinks on the agenda. Choose whether you want the download to be in Word or PDF format.



Generating an Agenda Packet

3. If you're choosing to download an agenda packet, decide whether you want a packet for the public or council by using the corresponding radio button. The public agenda packet contains a standard header, sections, agenda items, and a hyperlink for each attachment that was marked as *On the agenda for everyone to see*. The council agenda packet contains a standard header, sections, agenda items, and a hyperlink for each attachment that was marked either *On the agenda for everyone to see* or *On the agenda but confidential*.

If you elect to include cover pages, [agenda packets](#) will contain a cover page for each agenda item, preceding its attachments. The exception to this is agenda items for which cover pages have individually been marked as excluded via the [Agenda Item Details](#) page.

Attachments are printed as text or as links (as specified to the Granicus design team) on the report if marked as **Public** (for public packets) or **Public** and **Private** (for council packets).

Note: The attachment indicator below the **Generate Packet** button will show you whether all non-PDF attachments on agenda items belonging to this agenda have been converted to PDF. It will also indicate whether PDF attachments are ready for collation.

- If the indicator is still red, a packet can be generated, but the agenda report/cover page report links for any attachments that have not yet converted will still link to the native form (e.g., DOCX) of the file
- Non-converted files and any PDFs that were flagged will not be collated with the packet
- Click the indicator to see a list of files that have successfully converted and those that have not
- Refresh the indicator until all files that are not ready have been marked as converted

Click **Generate Packet**. You'll get a message at the bottom of the modal in purple text when the packet has been generated and is ready for download.

×

DOWNLOAD

FEBRUARY 26, 2018
CITY COUNCIL


AGENDA
ONLY

OR


AGENDA
PACKET

☒ FOR PUBLIC

THIS WILL NOT INCLUDE ITEM
ATTACHMENTS MARKED
CONFIDENTIAL

☐ FOR COUNCIL

THIS WILL INCLUDE ALL
ATTACHMENTS

☒ USE COVER PAGES

PUBLIC PACKET
HAS NOT BEEN GENERATED.

GENERATE PACKET

All attachments ready for packet generation.

Packet has not been generated. Click
the generate button to start.

DOWNLOAD

CANCEL

4. Click **Download**. The agenda download will be created using the [default template assigned to this meeting type](#). An example is shown below:



City Council Agenda

Monday, March 14, 2016 - 1:00 PM

The Council Chambers - 2440 8th Ave, Springfield, CO 80631

The meeting location is accessible to persons with disabilities. A request for an interpreter for the hearing impaired, or for other accommodations for persons with disabilities, should be made at least 48 hours in advance of the meeting to Emie Erikson, City Recorder at 555.888.1212.

The agenda may be amended during the meeting to add or delete items, change the order of agenda items, or discuss any other business deemed necessary at the time of the meeting.

1. PLEDGE OF ALLEGIANCE

2. CALL TO ORDER AND ROLL CALL

3. PUBLIC CALENDAR

This is an opportunity for members of the audience to bring to the Council's attention any item not listed on the agenda. Comments will be limited to three (3) minutes per person with a maximum of 15 minutes for all items. Speakers may not yield their time to others.

4. CONSENT CALENDAR

The consent calendar consists of items of a repeating or routine nature considered under a single action. Any Councilor may have an item on the consent agenda removed and considered separately on request

- 4.A. City Council Minutes - March 14, 2016 Special Meeting; March 14, 2016 Work Session and Regular Meeting
[MeetingMinutes031116.pdf](#)
[City-Manager-Report-3-15-.pdf](#)

- 4.B. Approval of Recommendation to the Colorado Liquor Control Commission (CLCC) to Green Giant's B & B, LLC for a Full On-Premise Sales Liquor License for a New Outlet to Green Giant's B & B, LLC located at 1815 65th Ave, Greeley, CO 80634
[03-06-16.pdf](#)

[<<< Previous: Adding an Agenda Item on the Fly](#)

[>>> Next: Publishing an Agenda](#)

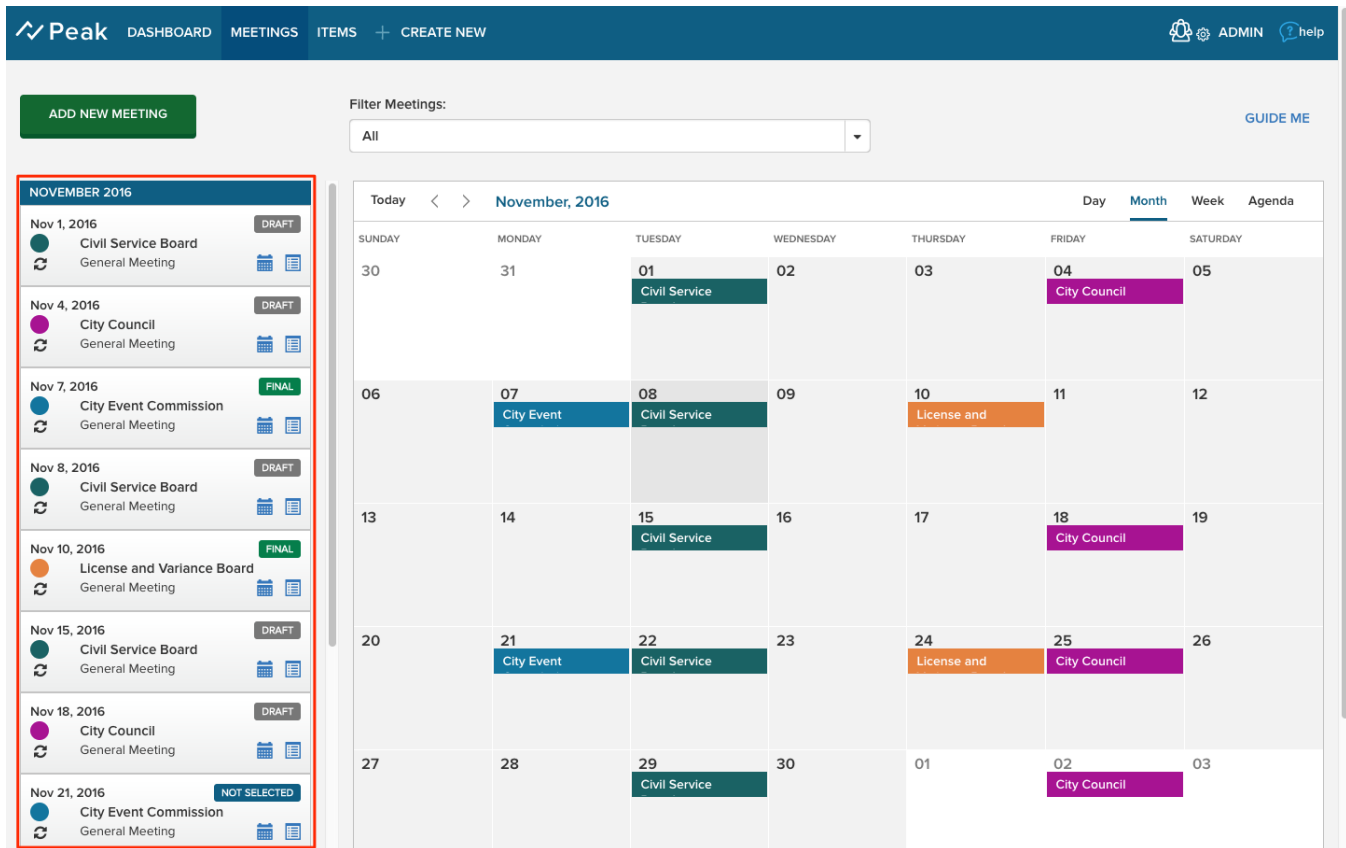
[Return to Peak help topics](#)

Editing Agenda Details in Peak

The **Agenda Details** button, which is found on each meeting card on the meetings page, provides you with a shortcut to view or edit agenda details. You can also [assign a Peak meeting body and type](#) to any meetings created at the platform level. This functionality is available to users with Agenda Coordinator or Peak Admin roles, and to Drafters for items in Final status.

To work with meetings and their associated agendas, click **Meetings** on the left-hand side of the navigation bar at the top of any page in Peak.

From the list of meetings on the left, select the meeting card associated with the agenda you wish to view or edit.



The screenshot displays the Peak Agenda Management interface. On the left, a sidebar contains a list of meetings for November 2016, each with a status (DRAFT, FINAL, NOT SELECTED) and an 'Agenda Details' icon. The main area shows a calendar view for November 2016, with dates 01 through 30. Meetings are color-coded and placed on specific dates: Civil Service (green), City Council (purple), City Event (blue), and License and Variance Board (orange).

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
30	31	01 Civil Service	02	03	04 City Council	05
06	07 City Event	08 Civil Service	09	10 License and	11	12
13	14	15 Civil Service	16	17	18 City Council	19
20	21 City Event	22 Civil Service	23	24 License and	25 City Council	26
27	28	29 Civil Service	30	01	02 City Council	03

Click the **Agenda Details** icon, found at the lower right-hand corner of each meeting card. Agenda details can also be accessed by clicking on the meeting directly in the calendar, or by clicking View Agenda on the Item Details page of an item associated with the given meeting.

Nov 4, 2016

City Council

General Meeting

AGENDA READY

The following figure illustrates an example of a meeting agenda details page. The toolbar on the left gives you options to lock the agenda, view meeting details, add sections or items, and publish or download the agenda. The Manual Agenda Numbering toggle enables you to [customize your agenda numbering scheme](#).

The agenda is pre-populated with sections according to the meeting type associated with the meeting (in this case, City Council Special type). The agenda reflects any edits that have been made to the agenda and its status.

Editing Agenda

Meeting Details

Add Section

Add Item

Publish

Download

FEBRUARY 26, 2018

City Council Meeting Agenda

General Meeting

The agenda is currently editable. To lock the agenda, click the Editing Agenda button on the toolbar to the left. You can add new agenda items and sections from the toolbar as well.

Manual Agenda Numbering is Off

Meeting Status: DRAFT

EXPAND ALL SECTIONS

1. Roll Call

2. Pledge of Allegiance

3. Proclamations

4. Recognitions

5. Adoption of Agenda

CANCEL

SAVE

Toolbar Functions

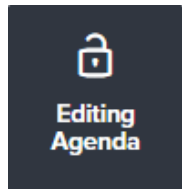
The table below describes the functions of the items on the toolbar. These buttons are operational only for users with an Agenda Coordinator or Admin role:

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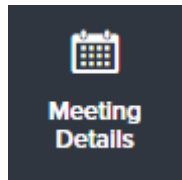
370166

Feature

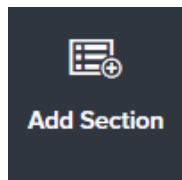
Description



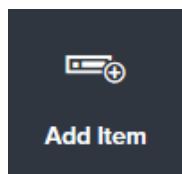
To edit details of the agenda, click the **padlock**. An unlocked padlock graphic indicates that editing is now possible. Agendas, when created, are unlocked by default; an Agenda Coordinator or Admin may lock the agenda at any time to prevent changes until the item is again unlocked.



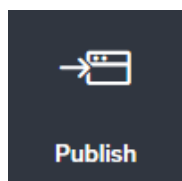
Click **Meeting Details** to go the Edit Meeting Details page, where you can [edit the location, date, time, or description of the meeting associated with this agenda](#).



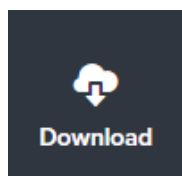
Click **Add Section** to create a new section for the agenda. You'll be able to edit, reorder, or delete sections after you add them.



Click **Add Item** to add an agenda item to this agenda. You'll be able to choose from existing items in Peak that are not already part of another agenda, or [create a new item on the fly](#).



Click **Publish** to [publish the agenda](#) to iLegislate, the Platform, or a public webpage.



Click **Download** to [download either the agenda by itself or an agenda packet](#). You'll be able to choose between Word and PDF formats for your download.

You can also change the status of the meeting by clicking the **Meeting Status** drop-down menu and selecting the status for this meeting. If the meeting is in not-final status, only Agenda Coordinators and Peak Admins can view it, while Drafters cannot. All users can view details for meetings with a final status assigned. [Status options are set up in admin](#) by a user with the Peak Admin role.

FEBRUARY 26, 2018

City Council Meeting Agenda

General Meeting

The agenda is currently editable. To lock the agenda, click the *Editing Agenda* button on the toolbar to the left. You can add new agenda items and sections from the toolbar as well.

☐ Manual Agenda Numbering is Off

Meeting Status: **DRAFT**

EXPAND ALL SECTIONS

1.

▶ Roll Call

+
trash

2.

▶ Pledge of Allegiance

+
trash

From here, you can edit, delete, or rearrange the order of the sections. Use the **trash can** (



) to delete a section, and the drag-and-drop **handles** (



) to drag the section to a new location within the agenda. Be sure to click **Save** at the bottom of the screen to save your changes to the agenda.

You can edit an agenda section by clicking the **arrow** to expand it. Or, expand all sections at once by clicking the **Expand All Sections** button at the top. There will be agenda item cards for each agenda item. Item cards include the agenda item's name, [ID number](#), [status](#), [record number](#), any associated attachments, and the current approvers. [Read more about item cards here.](#)

FEBRUARY 26, 2018 **City Council Meeting Agenda**
General Meeting

The agenda is currently editable. To lock the agenda, click the Editing Agenda button on the toolbar to the left. You can add new agenda items and sections from the toolbar as well.

Manual Agenda Numbering is Off Meeting Status: **DRAFT**

EXPAND ALL SECTIONS

1. ▶ Roll Call
2. ▶ Pledge of Allegiance
3. ▼ Proclamations

3.a. **APPROVED** Clerk to the Board Day 2018 **V1**

0 ATTACHMENTS **Cover Page Included**
4. ▶ Recognitions

Use the **pencil** (



) to edit details of the section such as the section title, the standard text, and whether the section is part of the numbering scheme. There is also a **pencil** for the agenda items themselves, and clicking it will take you to the Edit [Agenda Item](#) page. Use the drag-and-drop **handles** (



) to reorder agenda items, and the **x** icon (



) to remove an agenda item.

Removing an item removes it from this agenda, but it will remain in Peak and will be available for use elsewhere. You can also [Amend the item](#) from here to create an additional record of it.

The following figure shows an example of an agenda item in edit mode. Note the **padlock** button on the left-hand side. After saving any changes you have made, click this button to lock the item, preventing further edits. This functionality is available to users with Agenda Coordinator or Admin roles, as well as the Drafter of this item.

Agenda Item Details

 AMEND

< PREV

1

2

NEXT >

 Editing Item

 Set to Approved

 Duplicate Item

 View Agenda

 Cover Page Included

 Download



2016-197-Granicus
 Clerk to the Board Day 2017

V2



0 ATTACHMENTS

 Cover Page Included

ITEM DETAILS
APPROVAL STATUS

ITEM TITLE *

Clerk to the Board Day 2017

SUGGESTED ACTION

Assigning a Meeting Body and Type to a Platform Meeting

By clicking the **agenda details** button on an [event created at the platform level](#) (denoted by a dark blue color assignment), you can assign a Peak meeting body and type to the meeting. You'll get a message that the meeting does not have an associated body or type. Use the drop-down menu to choose a meeting body and type.

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374
 170

NOVEMBER 2, 2015

Budget Committee Appointments Meeting Agenda

The agenda is currently editable. To lock the agenda, click the Editing Agenda button on the toolbar to the left. You can add new agenda items and sections from the toolbar as well.

This meeting does not have a Meeting Body associated. Please select a Meeting Body and Meeting Type below.

Select a Meeting Body

Select a Meeting Type

SAVE

[<<< Previous: Editing Meeting Details](#)

[>>> Next: Customizing Agenda Numbering](#)

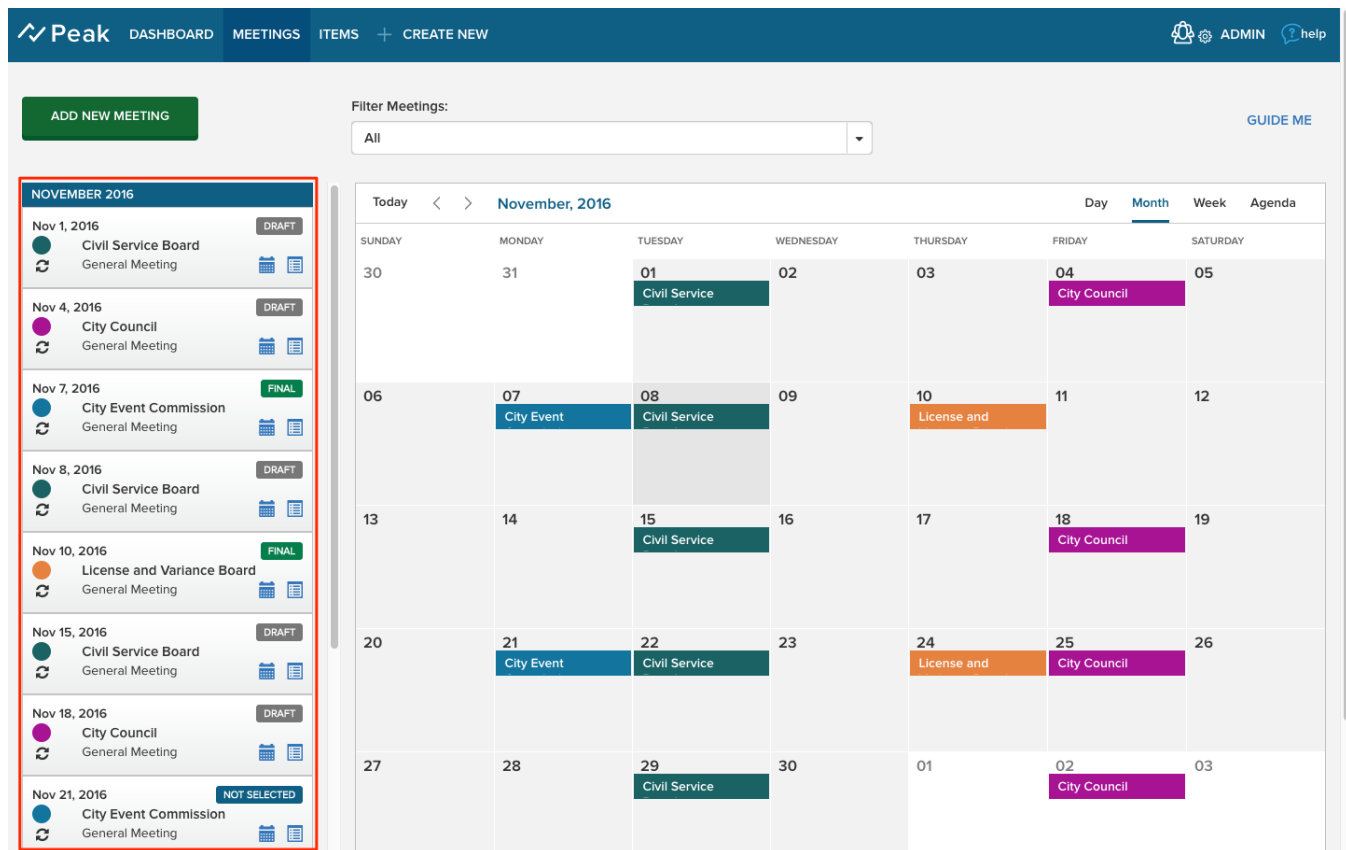
[Return to Peak help topics](#)

Editing Meeting Details in Peak

The **Meeting Details** button, which is found on each meeting card on the meetings page, provides you with a shortcut to view or edit meeting details. This functionality is available to users with Agenda Coordinator or Peak Admin roles.

To work with meetings, click **Meetings** on left-hand side of the navigation bar at the top of any page in Peak.

1. From the list of meetings on the left, select the meeting card for the meeting you'd like to view or edit.

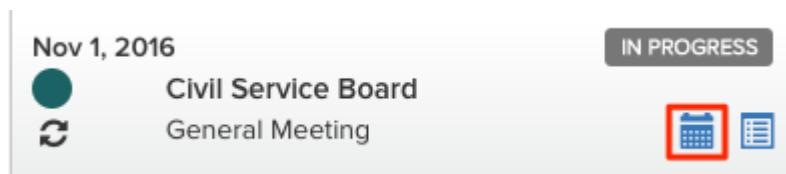


The screenshot shows the Peak Agenda Management interface. On the left, there is a list of meetings for November 2016. The list includes:

- Nov 1, 2016: Civil Service Board General Meeting (DRAFT)
- Nov 4, 2016: City Council General Meeting (DRAFT)
- Nov 7, 2016: City Event Commission General Meeting (FINAL)
- Nov 8, 2016: Civil Service Board General Meeting (DRAFT)
- Nov 10, 2016: License and Variance Board General Meeting (FINAL)
- Nov 15, 2016: Civil Service Board General Meeting (DRAFT)
- Nov 18, 2016: City Council General Meeting (DRAFT)
- Nov 21, 2016: City Event Commission General Meeting (NOT SELECTED)

The right side of the interface shows a calendar view for November 2016. The calendar displays the dates and the meetings scheduled for each day. The meetings are color-coded: blue for City Event, green for Civil Service, orange for License and Variance, and purple for City Council.

2. Click the **Meeting Details** icon, found at the lower right-hand corner of each meeting card:



The close-up shows a meeting card for Nov 1, 2016, titled "Civil Service Board General Meeting". The card has a status of "IN PROGRESS". In the bottom right corner, there are two icons: a calendar icon (highlighted with a red box) and a list icon.

3. If the meeting is a series, decide whether you want to edit this instance of the meeting only, or the entire series. To edit the series, select **Series**. On the right, you'll see a list of the meetings in the series.

OCCURRENCE

SERIES

This is a recurring meeting. On the right you will find a list of the meetings in the series for this meeting.

You're currently editing a single meeting occurrence. Your changes will only be applied to the meeting on January 22nd 2018, 5:00pm.

MEETING BODY *

City Council

MEETING LOCATION

JANUARY 2018

Jan 22, 2018

City Council
General Meeting

Jan 29, 2018

City Council
General Meeting

FEBRUARY 2018

Feb 5, 2018

City Council
General Meeting

4. Click within any of the following fields to edit details: **Meeting Location**, **Date**, **Time**, **Item Submission Deadline**, **Cutoff Time**, **Description**, and **Advanced Settings**. The following figure shows an example of meeting details for a meeting that is not part of a series:

MEETING BODY *

City Council

MEETING LOCATION**MEETING TYPE *****DATE *** **START TIME *** **END TIME *** **MEETING LENGTH**

1 hour

ITEM SUBMISSION DEADLINE **CUTOFF TIME** **DESCRIPTION****ADVANCED SETTINGS ▼**

Editing a series will also give you the recurrence pattern options:

REPEATS ***ON THE *** **DAY*****EVERY *** months

5. Click the green **Save** button to update any details that have changed. If you're editing a series, the updates will be applied to this and all subsequent meetings in the series.

6. To delete the meeting, click the **trash can** icon in the upper right-hand corner. A modal will appear asking you to confirm the deletion. If the meeting you're deleting is part of a series, you'll have the option to delete this single occurrence of the meeting, or delete the entire series. Meetings in the series that have already occurred will not be deleted.



Are you sure you want to delete this meeting or series?

DELETE SERIES

DELETE MEETING

Cancel

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

[<<< Previous: Advanced Settings for Meetings](#)

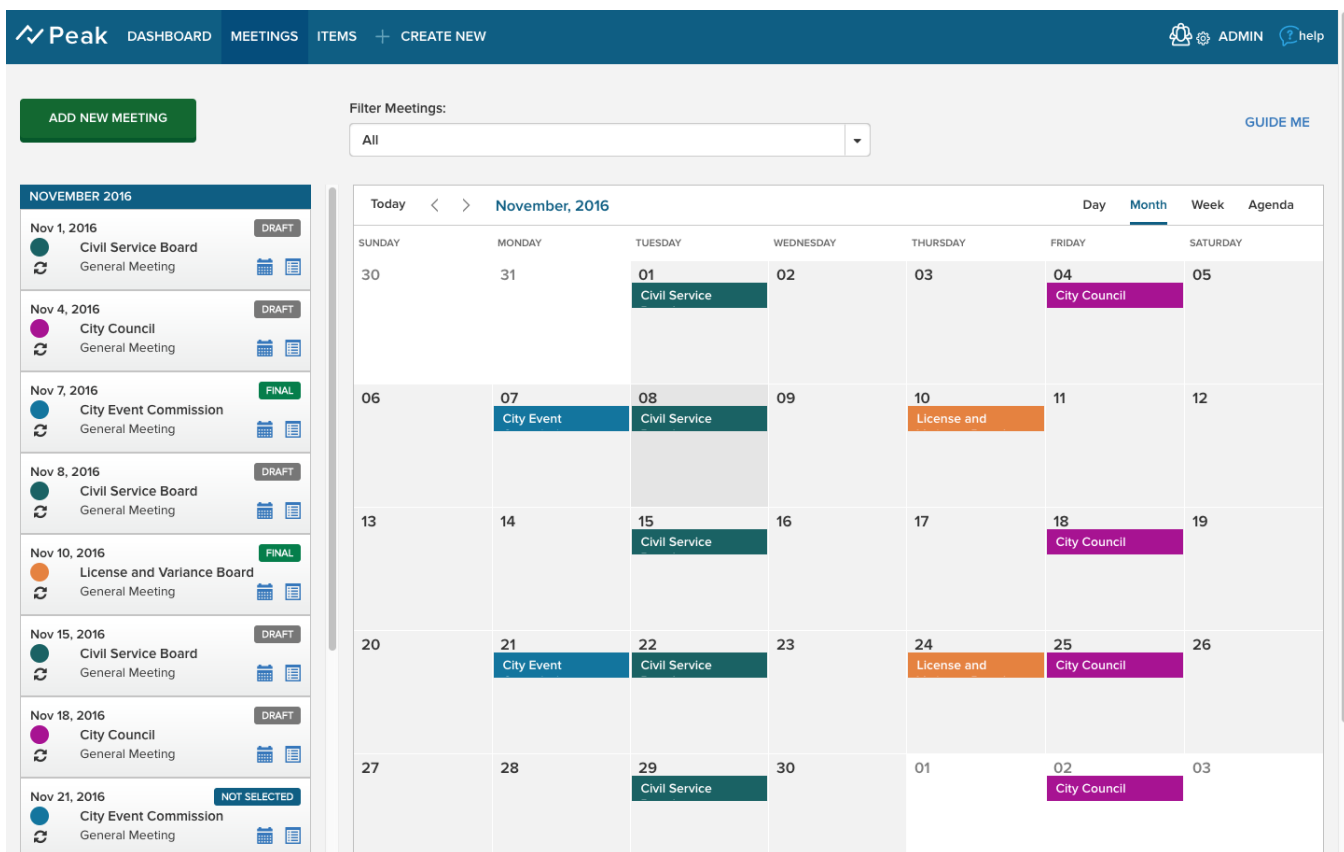
[>>> Next: Editing Agenda Details](#)

[Return to Peak help topics](#)

Navigating the Meetings Page in Peak

The Meetings page houses a calendar of all scheduled meetings as well as a scrolling list, in chronological order, of upcoming meetings. By default, the Month view of the calendar is shown, displaying the current month, one week prior, and one week after. Use this page to view and manage all meetings in Peak.

To work with meetings, click **Meetings** on left-hand side of the navigation bar at the top of any page in Peak.



The screenshot shows the Peak Meetings page. At the top is a navigation bar with 'Peak', 'DASHBOARD', 'MEETINGS' (selected), 'ITEMS', and '+ CREATE NEW'. On the right of the navigation bar are 'ADMIN' and 'help' links. Below the navigation bar is a 'Filter Meetings:' dropdown set to 'All' and a 'GUIDE ME' link. The main content area is divided into two sections. On the left is a scrolling list of meetings for November 2016. Each meeting card shows the date, meeting name, and status (DRAFT, FINAL, or NOT SELECTED). On the right is a calendar view for November 2016. The calendar has tabs for 'Day', 'Month' (selected), 'Week', and 'Agenda'. The calendar grid shows dates from Sunday 30 to Saturday 03. Meetings are color-coded by body: Civil Service Board (dark blue), City Council (purple), City Event Commission (blue), License and Variance Board (orange), and City Event Commission (blue). The meeting cards on the left provide details for each meeting, including the date, name, and status.

Meetings are **color-coded by meeting body** to help you quickly identify meetings. The meeting cards in the scrolling list at the left provide details of each meeting—from there, you can access meeting details and the meeting agenda.

Note: Meetings created at the platform level show up in Peak as dark blue and are labeled with the name of the event. These events do not have an associated meeting body or meeting type and will be labeled in the list with the event name only. A Peak meeting body and meeting type may be assigned to these meetings by editing the agenda for this meeting. In this case, the meeting will maintain its event name in the calendar, the meeting type will display on the left, and the meeting will be color-coded according to the associated meeting body.

Use the arrows at the upper left to move back and forth chronologically on the calendar. You can also customize your view by clicking on **Day**, **Month**, **Week**, or **Agenda** in the upper right above the calendar:

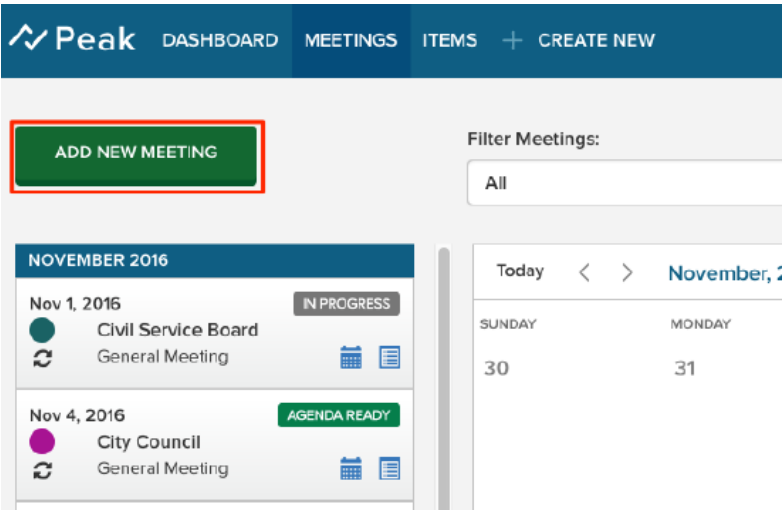
Today < > October, 2015						
Day Month Week Agenda						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
27	28 Budget Committee	29 City Council Utilities Board ...	30	01	02	03
04	05 Budget Committee	06 Utilities Board	07 Training Team	08	09	10

The **Agenda** view will show one week of meetings in a list format. Click **Agenda** on the view options, then click the date range that appears above the list. Select the starting date of the week you'd like to view. Meetings falling on dates up to but not including the end date will be shown in the list.

Today < > Thursday, June 23, 2016-Thursday, June 30, 2016			Day	Month	Week	<u>Agenda</u>
DATE	TIME	EVENT				
23 Thursday June, 2016	10:00 AM-11:00 AM	License and Variance Board				
24 Friday June, 2016	3:00 PM-4:00 PM	Fine Art Comission				
28 Tuesday June, 2016	4:00 PM-5:00 PM	Small Business Council				
29 Wednesday June, 2016	2:00 PM-3:00 PM	City Development Planning Board				

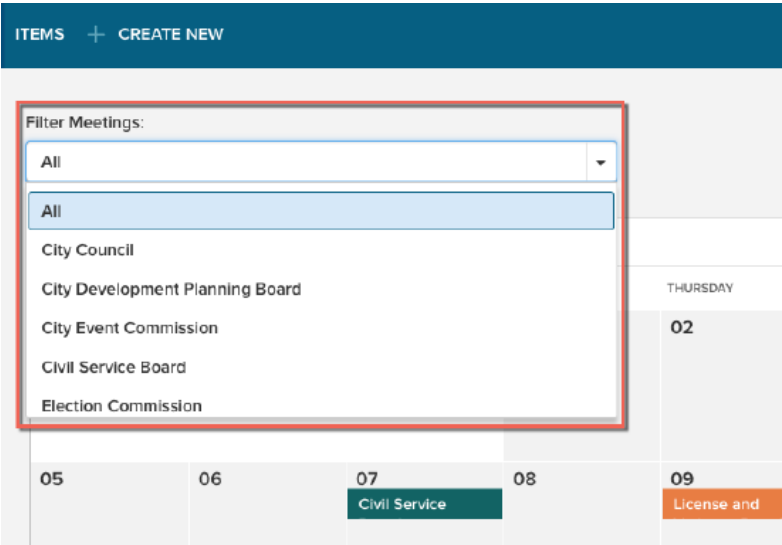
The table below outlines key features of the Meetings page:

Feature	Description
Add New Meeting	The Add New Meeting button takes you to the new meeting screen, where you can schedule and fill in details for a meeting. This button is only visible to those users with an Agenda Coordinator or Peak Admin role.



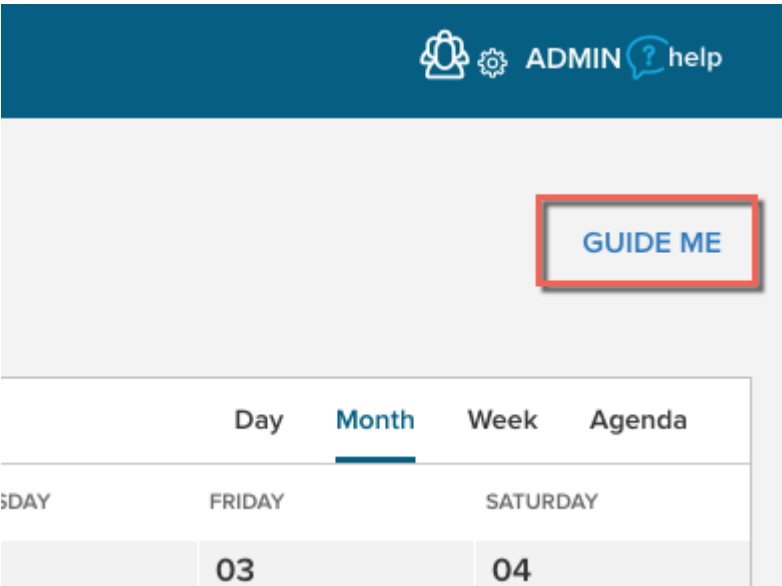
This drop-down menu allows you to view only those meetings associated with the selected body. Note: The filters remain active as you travel between different calendar views.

Filter Meetings



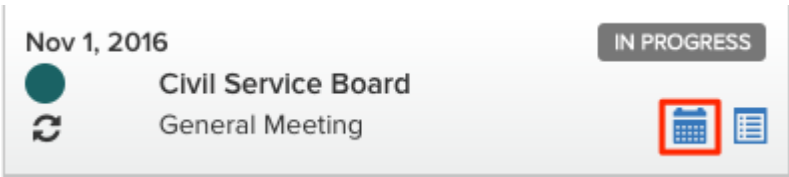
Guide Me

This in-app help guide, accessed in the upper right-hand corner, will take you through each feature on the page.



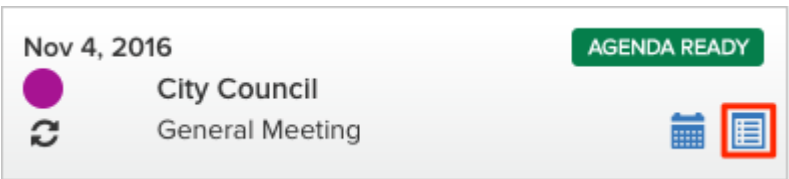
The **Meeting Details** button allows you to [quickly view or edit](#) the details for the selected meeting. This button is only visible to those users with an Agenda Coordinator or Peak Admin role.

Meeting Card: Manage Meeting Details



The **Agenda Details** button allows you to [quickly view or edit](#) the details for the selected agenda. This button is visible to those users with an Agenda Coordinator or Peak Admin role; for those agendas that are in a Final status, it will also show up for Drafters. Agenda details can also be accessed by clicking on the meeting entry in the calendar itself.

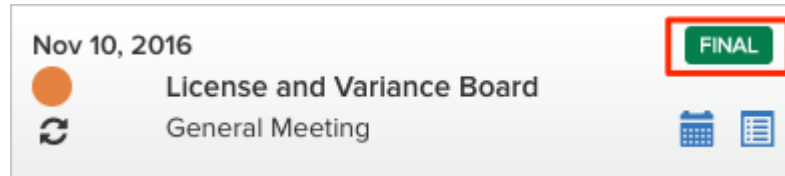
Meeting Card: Manage Agenda Details



Agenda Status

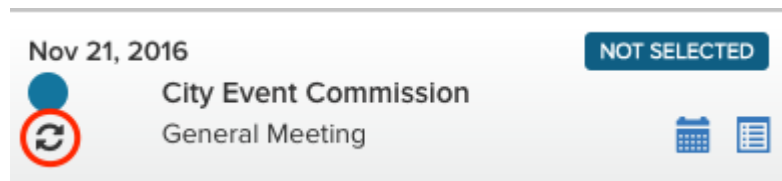
The [agenda status](#) will show in the corner of each card. As an Agenda Coordinator or Peak Admin works on an agenda, they can change the status, which will be reflected here on the meeting cards. Status names, e.g., **Draft**, **Agenda Ready**, and **Final**, are defined in

Admin. Draft statuses will be highlighted in gray, and final statuses will be highlighted in green. If no status has been assigned; the default **Not Selected** will be applied with a blue background.



This icon indicates that this meeting is one of a series of meetings. The icon is not present on cards that represent a one-time meeting.

Recurring Meeting Icon



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Publishing an Agenda in Peak

A Peak Admin or Agenda Coordinator can publish a Peak agenda to MediaManager. Both the meeting information and the agenda with its items and attachments publish to MediaManager. There are two options: publish to iLegislate and publish to the web.

- When published to iLegislate, the agenda can be viewed along with the corresponding event on the Granicus platform (MediaManager). This option also publishes the agenda to iLegislate so that a user with a Peak login and password can access the agenda there.
- Publishing to the web gives you all the functionality described above, and you can also select a view for the agenda from the drop-down menu. The menu is populated with view pages from your platform.

1. To publish the agenda you're working with, click the **Publish** button on the left-hand side of the [Edit Agenda Details](#) page.



Agenda Locked

Meeting Details

Add Section

Add Item

Publish

Download

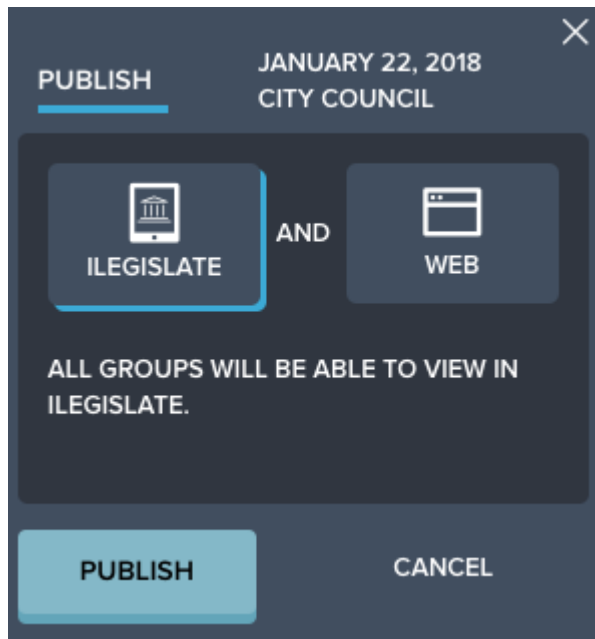
JANUARY 22, 2018
City Council Meeting Agenda
General Meeting

The agenda is not currently editable. To unlock the agenda, click the Agenda Locked button on the toolbar to the left.

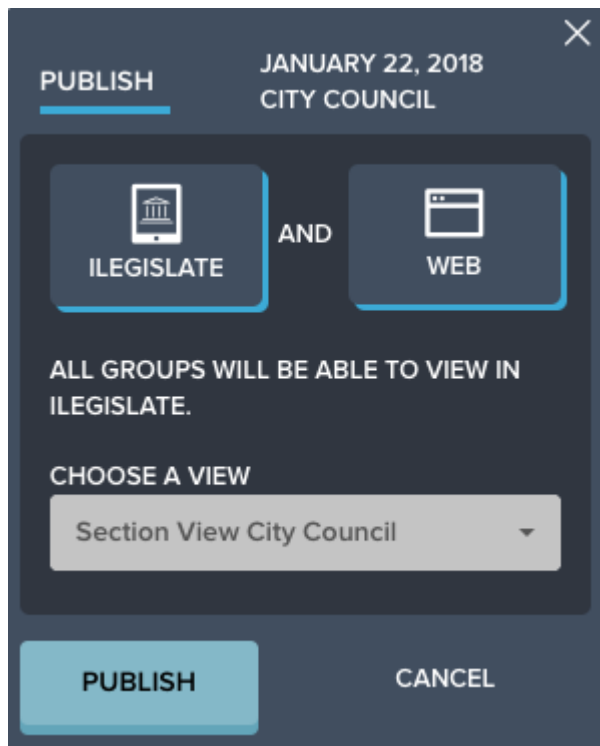
Meeting Status: FINAL

- Roll Call
- Pledge of Allegiance
- Proclamations
- Recognitions
- Adoption of Agenda
- Public Comment
- Consent Agenda 4 AGENDA ITEMS
- Presentations

2. The **Publish Agenda** modal displays, as shown below. Choose whether you want to publish to **iLegislate**, **Web**, or both by clicking the icons.



3. If you are publishing to the web, select a view page from the **Choose a View** drop-down menu. This menu is populated with the Content Views from your Granicus platform under **Admin > Views**.



4. Click **Publish**. You'll now be able to view the agenda and its attachments on MediaManager or your selected view page. Microsoft documents will be converted to PDF format. On MediaManager, you can view the published agenda by navigating to the Events tab and then clicking **View Agenda** next to the event.

If an agenda packet has been previously generated, clicking **Publish** will publish both the agenda and the agenda packet. If anything has changed in the agenda, regenerate both the agenda and the packet so that when you publish, both will be current. The agenda packet will display only on the view page.

[Home](#)
[Events](#)
[Archives](#)
[Reports](#)
[Admin](#)

[New Event](#)

◀ ▶

Dec 31, 2017 - Jan 30, 2018

[Go to Today](#)

◀ ▶

Dec 2017

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Tue Jan 2, 2018	2:00 PM	⌘ Civil Service Board	Agenda Not Published	Actions ▼
Fri Jan 5, 2018	2:00 PM	⌘ License and Variance Board	Agenda Not Published	Actions ▼
Tue Jan 9, 2018	2:00 PM	⌘ Civil Service Board	Agenda Not Published	Actions ▼
Thu Jan 11, 2018	4:30 PM	City Event Commission	Agenda Not Published	Actions ▼
Fri Jan 12, 2018	2:00 PM	⌘ License and Variance Board	Agenda Not Published	Actions ▼
Tue Jan 16, 2018	2:00 PM	⌘ Civil Service Board	Agenda Not Published	Actions ▼
Fri Jan 19, 2018	2:00 PM	⌘ License and Variance Board	Agenda Not Published	Actions ▼
Mon Jan 22, 2018	5:00 PM	⌘ City Council	View Agenda	Actions ▼
Tue Jan 23, 2018	2:00 PM	⌘ Civil Service Board	Agenda Not Published	Actions ▼

Item cover pages may be included in the published agenda depending on how Admin is set up. Contact your Peak Admin to see how this is set up in your system.

Note: Once you click **Publish**, your agenda becomes locked to prevent changes. An Agenda Coordinator or Peak Admin can unlock to enable further edits. Because publishing itself does not recreate the agenda packet, it is always best to continue to follow this order whenever changes are made to agenda:

1. [Download the agenda](#) (this generates the report)
2. [Generate the agenda packet](#)
3. Publish to iLegislate or the web as described above

[<<< Previous: Downloading an Agenda](#)

[>>> Next: Navigating the Items Page](#)

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Video Production Commission Agenda Item Report

Meeting Date: October 14, 2019

Submitted by: Granicus Support

Submitting Department:

Item Type: Ordinances

Agenda Section: Business

Subject:

afdafa

Suggested Action:

fadfad

Attachments: