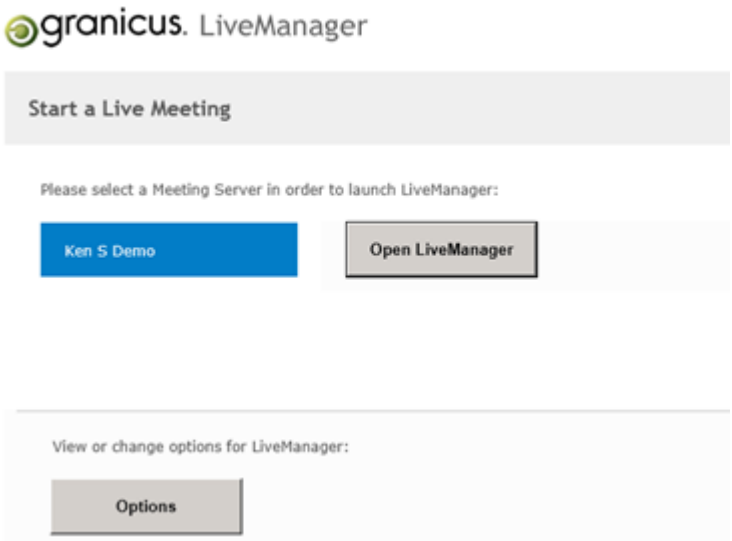
Working with LiveManager and iLegislate Voting (Clerks)

The iLegislate Voting System integration allows meeting members to join meetings, request to speak, mover and second motions, and and vote on agenda items from their own iPads. This quick reference guide provides step-by-step instructions for meeting clerks when using LiveManager with iLegislate Voting.

Step 1: Launch LiveManager

1. Double click the LiveManager icon to launch LiveManager from your desktop.

2. Click **Open LiveManager**.



Step 2: Load a Meeting

1. Click the **Load Meeting** button. The **Load Meeting** menu appears.

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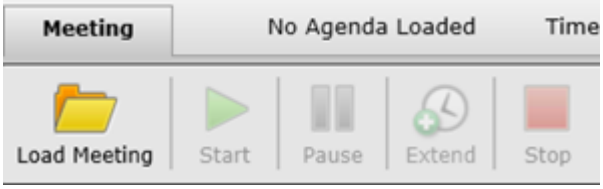
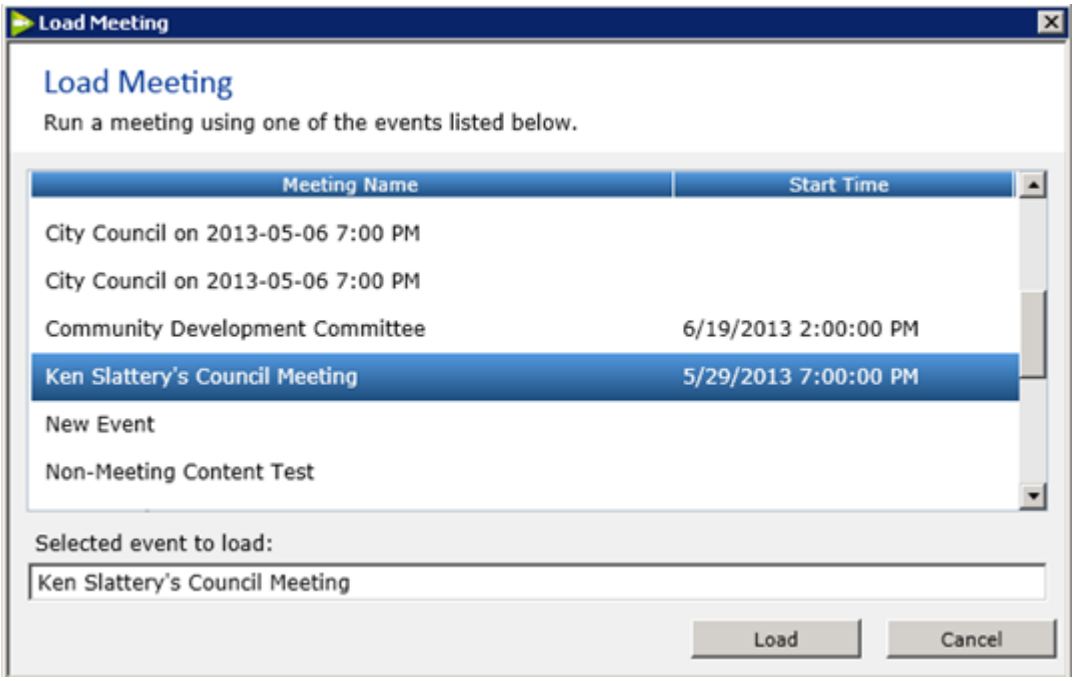


2. Select your meeting from the list of available meetings (it becomes highlighted and appears in the **Selected event to load** field).

Note: If LiveManager is configured to open more than one meeting at a time, hold down **Ctrl** to select more than one meeting to load.

3. Click **Load**.



Step 3: Add Attendees (if necessary)

Please note that the attendee's first and last names must match in their People record in Legistar and in the Users subtab in MediaManager Admin. This includes the attendee's middle name, so if there isn't one in Legistar, the Middle Name field must be blank in MediaManager. In most situations, however, all Legistar users for the meeting body will be available for selection from the Add Attendees screen in LiveManager.

If the mayor only votes in the case of a tie-breaker, do not mark the mayor as a voting attendee until a tie-breaker vote is needed. Then, when a tie vote occurs, return to the Attendees tab and mark the mayor as a voting member by selecting the **Voting** checkbox. This will cause the voting panel to appear on the mayor's iPad.

If you need to add additional attendees, click the **Attendees** tab, enter the name of a new attendee, and click **Add Attendee**. Make sure to select the **Voting** checkbox for the new attendee if they are voting during this meeting.

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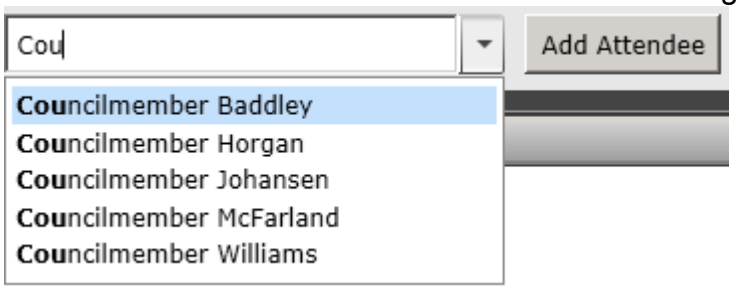
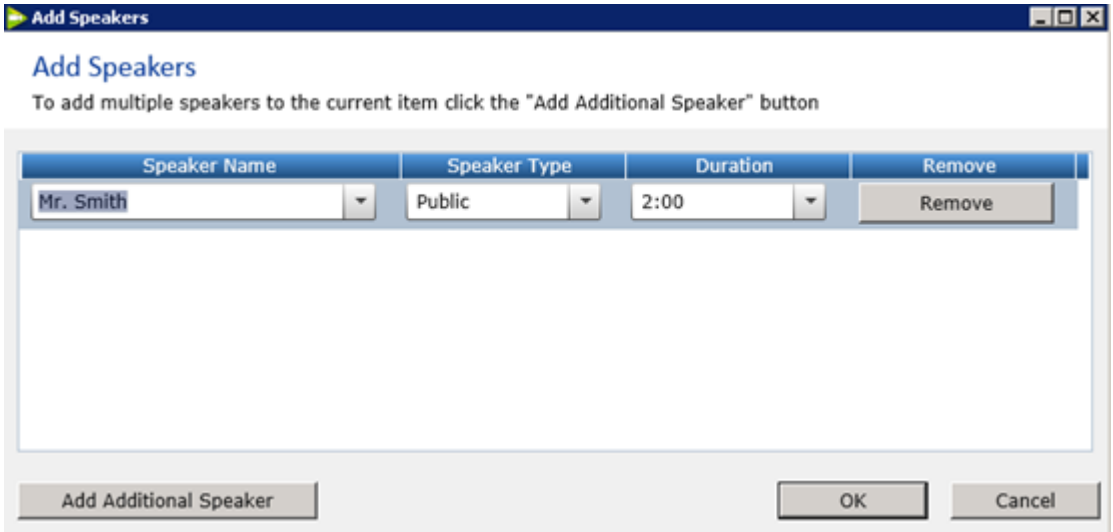


Step 4: Add speakers manually before or during the meeting

Meeting members can request to speak on an agenda item from within iLegislate, but you can still manually add speakers by completing the following steps:

1. Select the agenda item to which you want to add a speaker, and click the **Speakers** tab.
2. Click **Add Speaker**.
3. In the **Speaker Name** field, enter the name of a new speaker, or select an existing name from the drop-down menu.
4. In the **Speaker Type** field, select **Public**, **Staff** or **Elected Official**.
5. In the **Duration** field, designate an amount of time for the speaker. Note that you cannot specify an amount of time for the Elected Official speaker type.
6. If necessary, click **Add Additional Speaker** to add more than one speaker to an agenda item, and click the appropriate **Remove** button to delete a speaker.
7. Click **OK** when you have finished adding speakers.



Step 5: Add new agenda items before or during the meeting

Note: This is a rare occurrence.

1. Click **Agenda Item** at the top of the screen, or right-click an existing agenda item in the left **Agenda** panel and select **Add Agenda Item** (this adds a new child item to the selected item). The **New Agenda Item** tab becomes available in the middle of the screen.

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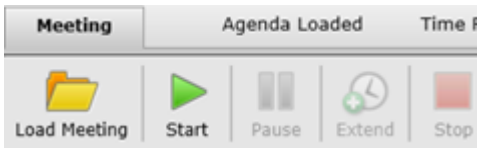
2. In the **Agenda Item Text** field, enter the title of the agenda item.
3. (Optional) In the **Department** field, enter the name of the department associated with the agenda item.
4. (Optional) In the **Suggested Action** field, enter a suggested action for this agenda item, e.g., approve, amend, etc.
5. Click **Save**.
6. If necessary, drag and drop the item to where you want to place it on the agenda.

Notes:
You can edit existing agenda items before the meeting. Select the agenda item you want to edit from the left **Agenda** panel, make the appropriate edits in the **Agenda Item Text**, **Department**, and **Suggested Action** fields, then click **Save** (or press **Ctrl + S**).

You can also delete an agenda item: right-click on the selected item, click **Delete** (or press **Ctrl + D**), and then click **Delete** again at the confirmation prompt.

Step 6: Start the meeting

Click the **Start** button to start the meeting. Once the meeting has started, meeting members see a **Join** button on the iLegislate Agendas screen that allows them to join the meeting in progress.



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Note: During the meeting, use the following buttons as necessary:

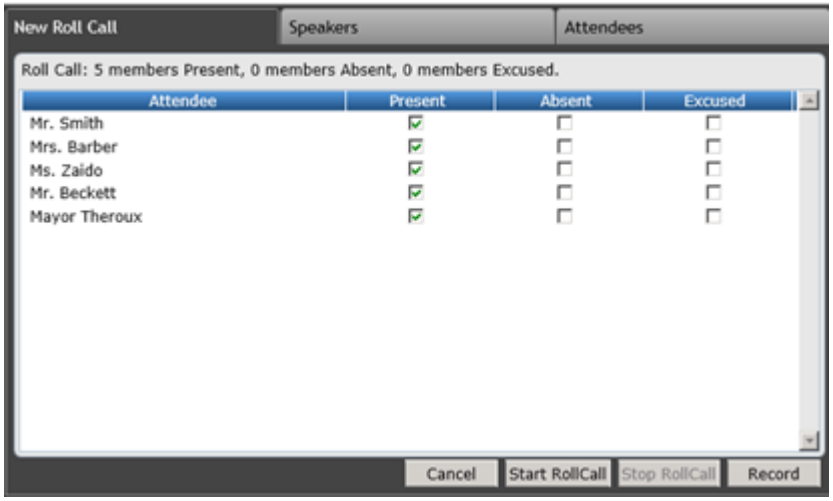
- Click **Pause** to pause the meeting (if it goes into recess). You will need to click **Start** to resume the meeting when it reconvenes.
- Click **Extend** to extend the meeting time by 30 minutes.
- Click **Stop** to finalize meeting details and end the meeting.

Step 7: Take a roll call

iLegislate uses Roll Call to determine whether or not a meeting member sees the voting panel (and is thus allowed to cast a vote on an agenda item). If a meeting member has been marked *Absent*, the voting panel will not appear when it is time to vote.

Note: You must take Roll Call before you can use the **Record Unanimous Yea Vote** button.

1. Click **Roll Call** (or press **Ctrl + R**).
2. Under the **New Roll Call** tab, select the **Present**, **Absent**, or **Excused** option for each meeting member.
3. Click **Record** when you are finished. The Roll Call is timestamped in the Minutes panel on the right side of the LiveManager screen.



Step 8: Timestamp an agenda item

Select the item from the left **Agenda** pane, and either double-click the item or click **Record** in the middle of the screen. The item is timestamped in the **Minutes** panel. As each agenda item is highlighted in LiveManager, the meeting members will see that same item highlighted on the agenda in iLegislate.

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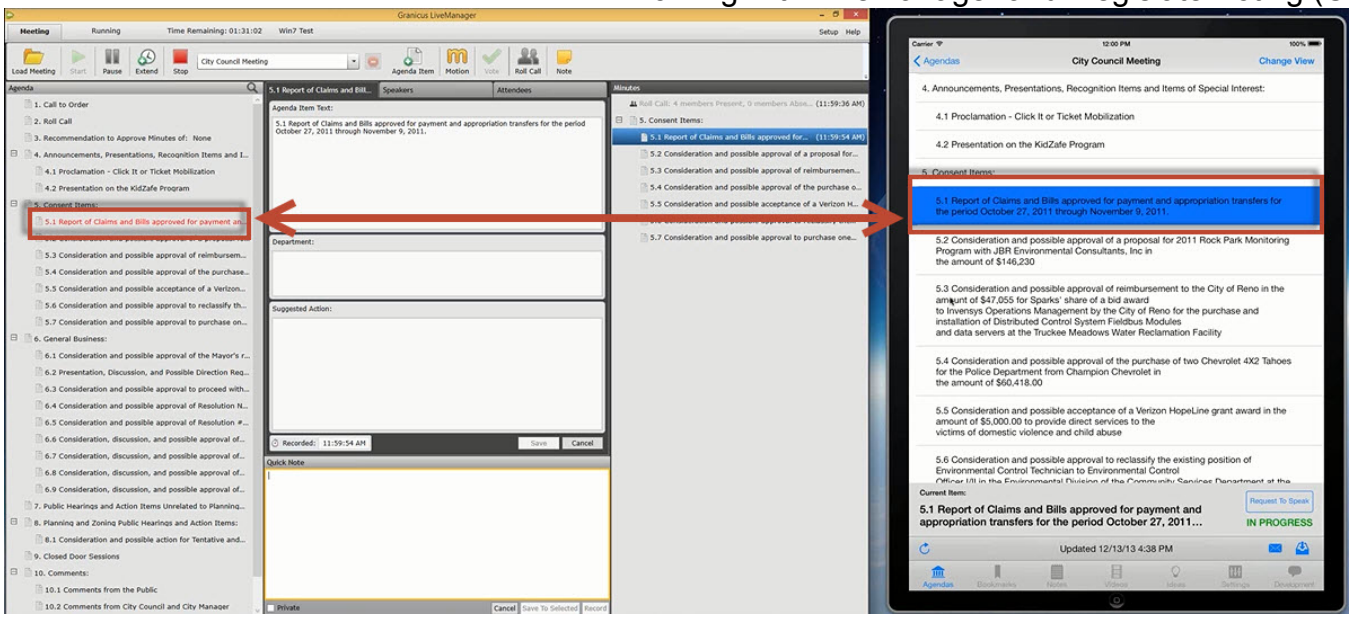
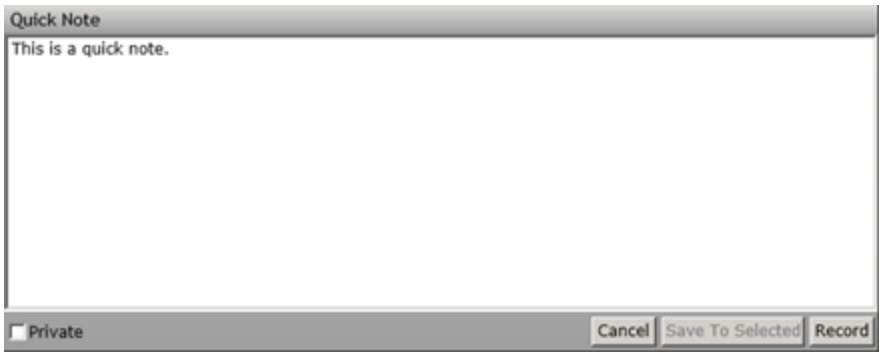


Step 9: Record notes

Enter notes in the **Quick Note** field, and click **Save to Selected** or **Record**.

Save to Selected: saves a note without a timestamp under any item you've selected on the minutes. This is useful for recording notes to items that have already occurred.

Record: assigns a timestamp to the note and it always appears under the active item (which could be a motion, vote, roll call, agenda item, etc). The active item (denoted by red text when it's not selected) can be different from the one you've selected.



Note: Select the **Private** checkbox if you want to make this a private note rather than a note that is visible to the public.

Step 10: Call a speaker to speak on an agenda item

Meeting members may request to speak from within iLegislate by tapping the **Request to Speak** button in the bottom right corner of an agenda.

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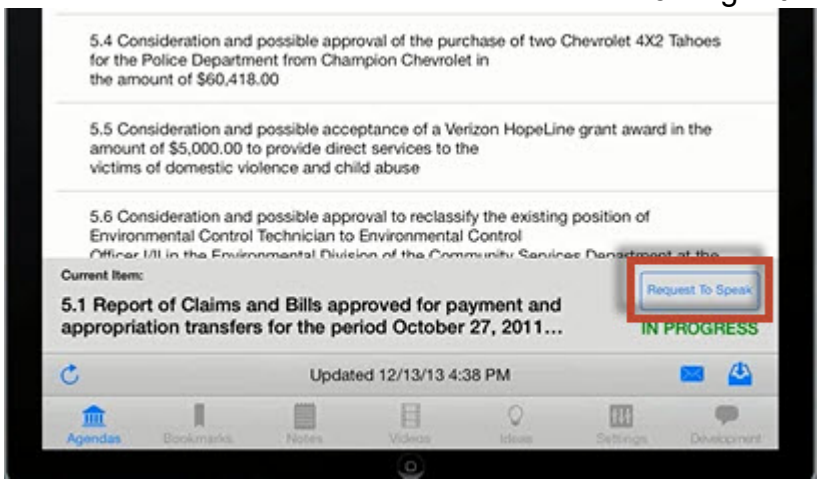
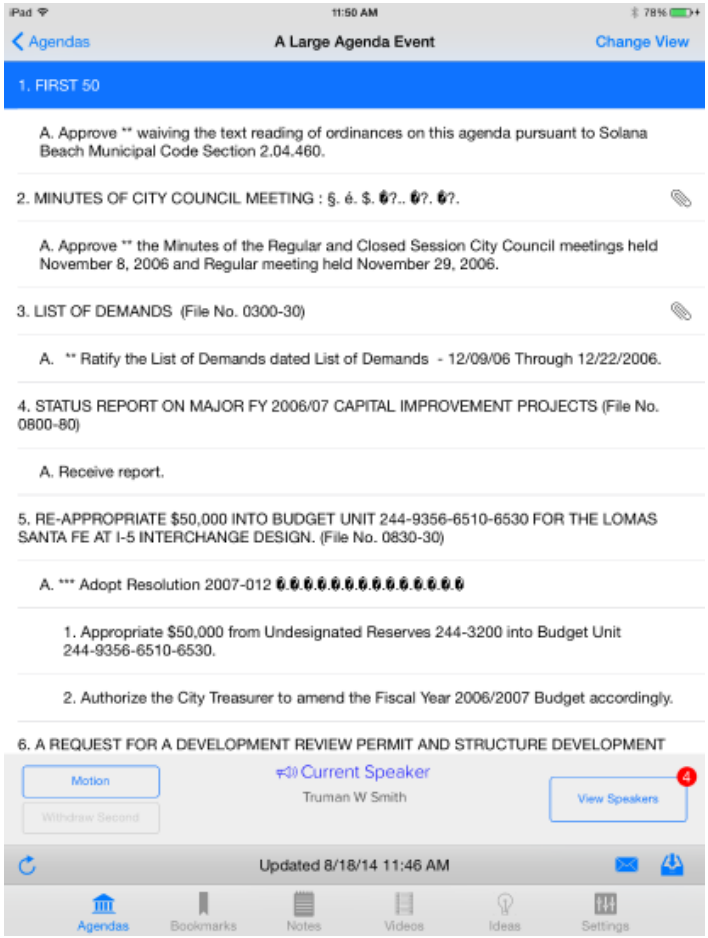


Each time a meeting member requests to speak, they are added to the Speaker list.

The **meeting chair** can view on their iPad the number of speakers who have requested to speak. This number increases as new requests to speak are made. Each time a person is called to speak, this number reduces by one. **Council members** cannot view the speaker list but can view the name of the current speaker from their iPads.



Meeting Chair only:

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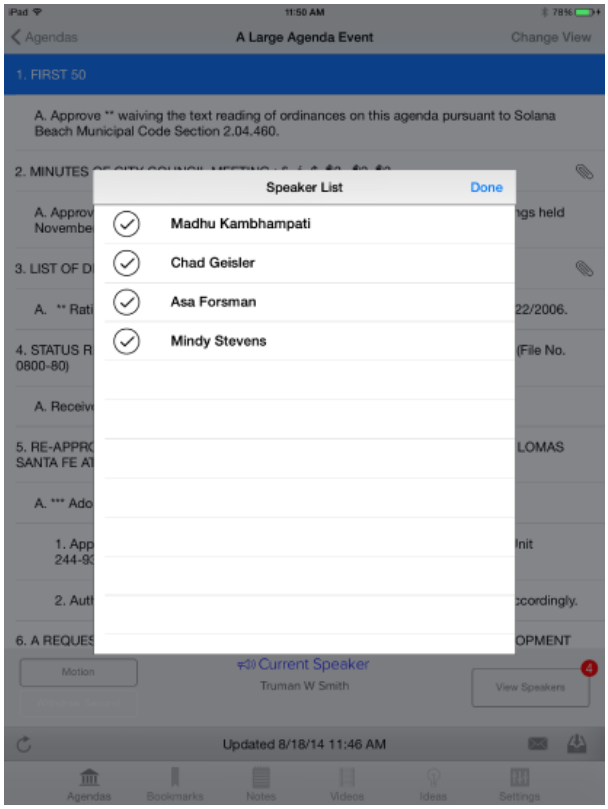
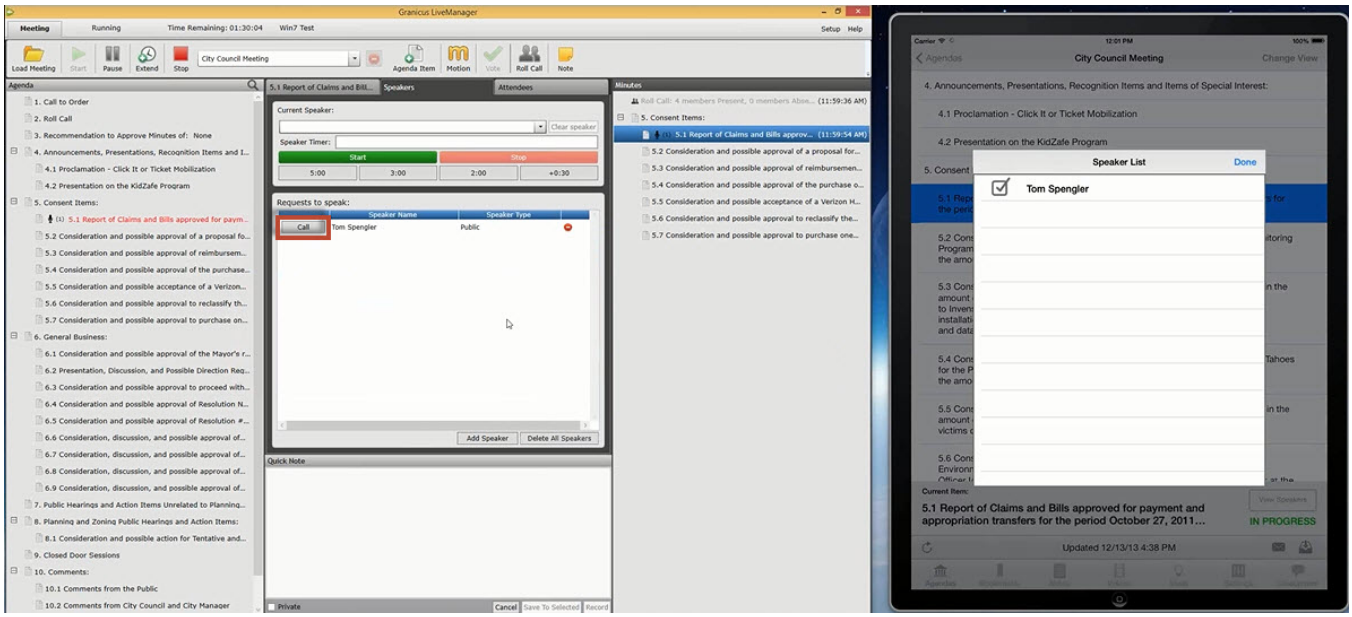


To call speakers for an agenda item, complete the following steps:

1. Click the **Speaker** tab.
2. Click **Call** next to the speaker's name (before you do this, you can add the speaker manually if necessary).



3. You can change the time in the **Speaker Timer** field to 5:00, 3:00, or 2:00, or add additional time to the existing time by clicking **+0:30**. Note that you can configure these default times in your LiveManager Options.
4. Click **Start** when the speaker starts speaking. The speaker timer begins in LiveManager.
5. Click **Stop** when the speaker is finished speaking.
6. Click **Clear Speaker**.

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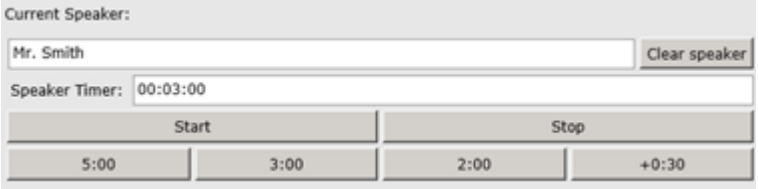
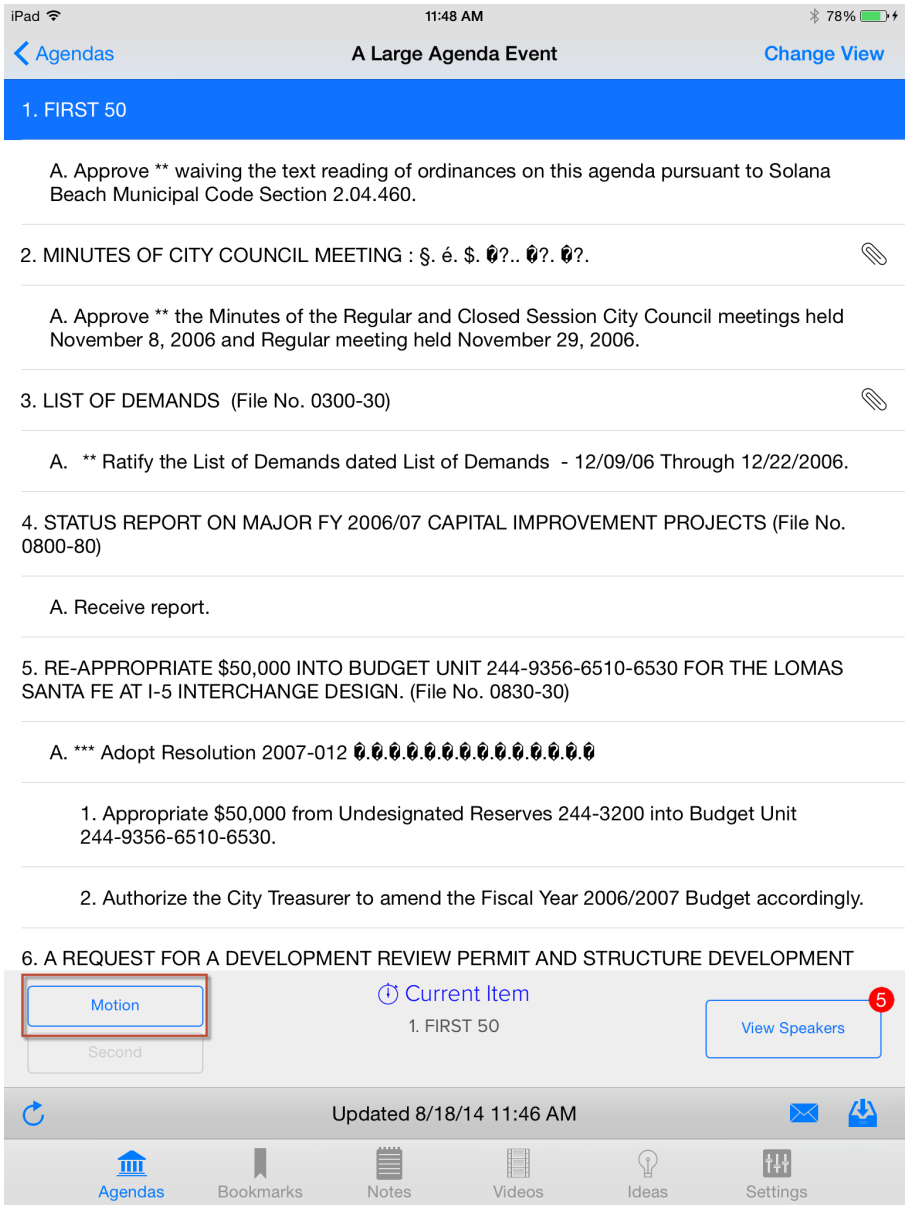


Step 11: Create a motion for an agenda item and record a vote for the motion

Council Members can use iLegislate to make and second motions on the current agenda item. These buttons are highlighted based on the state of the meeting. They can tap the **Motion** button to make a motion, or if another council member has already made the motion, they can tap the **Second** button to second the motion. When they do this, their names will appear in the appropriate **New Motion Item** field (**Mover** or **Seconder**) in LiveManager.

They can also withdraw their motion or their seconding of the motion from their iPads.



1. Verify the agenda item is timestamped.
2. The **New Motion Item** fields are displayed when a motion is made. The mover and seconder will display the name of whoever made and seconded the motion from their iPads.

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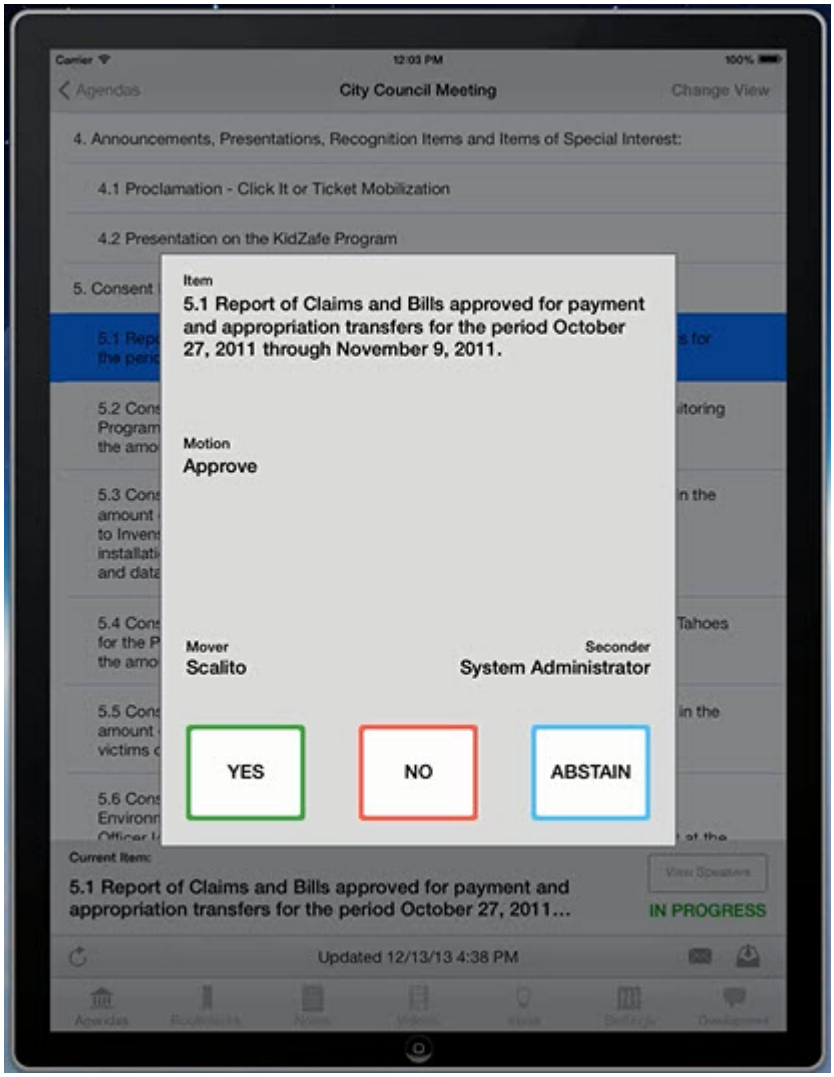
3. Select the **Action** from the drop-down menus available. You can enter the first few letters of the person's name or the action to narrow down the list. Once you have one person or action, tab to the next field.
4. Enter the text of the motion in the **Motion Text** field.
5. Click **Record** to save the motion to the minutes.
6. Click **Start Voting** to open the voting panel in iLegislate. Council members see the motion action (not the full motion text), the Mover, the Seconder, and are given the option to vote *Yes*, *No*, or *Abstain*.



7. After all voting members have had the chance to cast their votes, click **Stop Voting** to end the vote.

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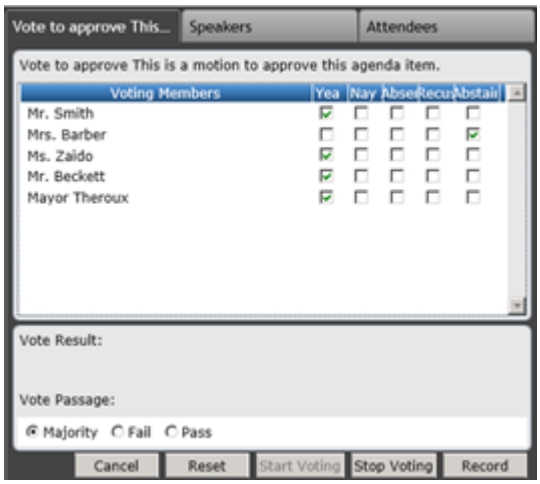
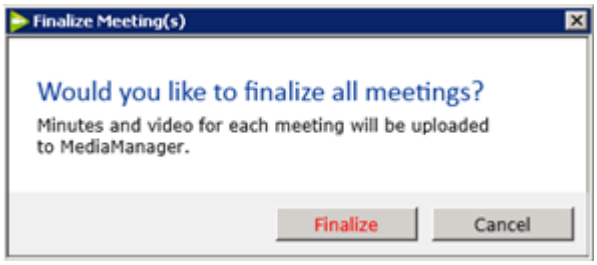


8. Click **Record** to save the results of the vote. If the vote passed, the Vote Result will appear green. If it failed, it will appear red.

Step 12: Finalize the meeting

1. Click **Stop**. The following message is displayed.



2. Click **Finalize**. The meeting data will be available in MediaManager after it finishes uploading.

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