

# Legistar Approving Agenda Items/Files

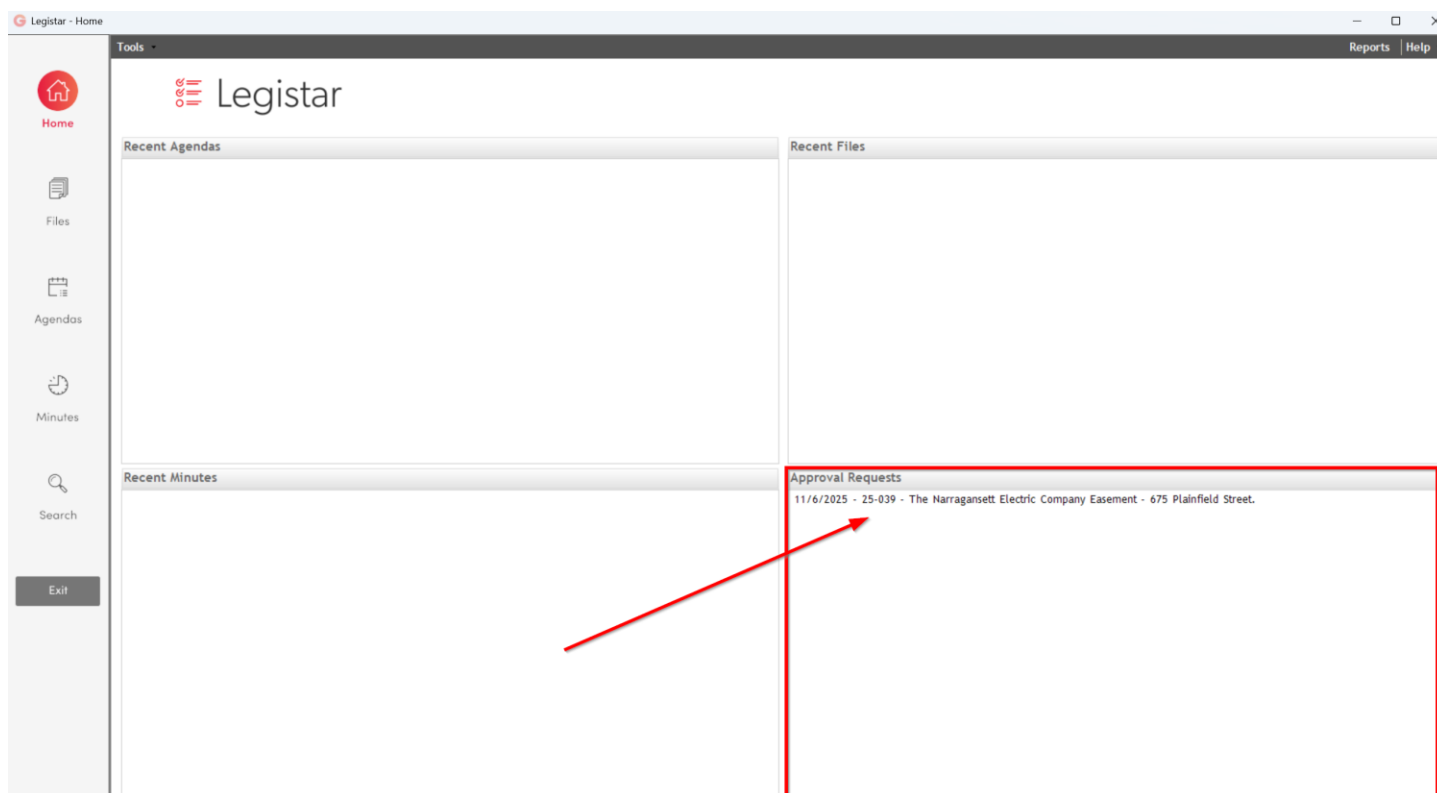
## Providence, RI

### Overview

This quick reference guide provides instructions on how to review and Approve Agenda Items/Files. Most Files require review and approval prior to being added to an Agenda. Approvers will log into Legistar to review a File and act on it. Within the Legistar workflow, anyone who is part of an approval workflow is called an "Approver".

### Step 1: Reviewing an Agenda Item/File in Legistar

1. From the Home module, select the File to review and approve by double-clicking the item from the **Approval Requests** pane in the lower right quadrant of the screen. You will be taken to the **Approval Tracking** tab.



2. If applicable, review the **Type**, **Meeting Type**, and **Agenda Date** fields at the top of the screen. If you are *not* the first Approver in the sequence, you can also review any notes or actions from previous Approvers on the Approver Action tab. If you *are* the first Approver, there will not be any Approver or workflow history to review yet.

Legistar - Legislative Files (Edit Record Mode)

Save | Search | New | Clear | Unlock | Edit | Tools | Browse | Reports | Help

EZ Text Search

File ID: 25-039 ID: Type: Resolution Status: Approval Review

Meeting Type: City Council File Created: 10/14/2025

Title: The Narragansett Electric Company Easement - 675 Plainfield Street. Agenda Date: 11/6/2025

Final Action

Agenda Title/Recommendation Attachments (4) Associations Details Approval Tracking (5) Minutes History

Seq #	Approver Name	Due Days	Action Type	Email Template	Status	Due Date	Action	Action Date	Escalation Date	Notes
01	Granicus Approver	2	Approver	Individual Review Request	Escalated for Inaction	10/17/2025		10/15/2025 12:4...	10/15/2025	No
02	Manny Sanchez	1	Approver	Individual Review Request	Escalated Review Req...	10/16/2025				No
03	Granicus Training	2	Approver	Individual Review Request						No
04	Granicus Implementation	2	Approver	Individual Review Request						No
05	Granicus Training	0	FYI	FYI Notification						No

Requester: Granicus Drafter

Save As | Pause | Cancel | Escalate | 3 of 5 | New | Delete | Pending

Manage Approver Approver Action Search

If other approvers have taken action before you, you can highlight their name on the grid, and review their notes on the Approver Action tab

- Click the **Agenda Title/Recommendation** tab. You can review the Agenda Item text by scrolling through the window at the bottom of the screen. **If edits to the Text File are required**, click **Edit** to access and open the Microsoft Word template to make changes. When changes are complete, click the **Save** icon in Word and **close** out of Word to save your changes to Legistar and return to the Files module.

**NOTE:** If changes are made to the **.title** section of the template, a pop-up box appears asking you to confirm the **Title** changes. Click **OK** to continue and update the Title field with the new template text.

**NOTE:** It may also be possible for Approvers to Import a new version of the Text File, rather than update the existing Text File. Please see Step 2, Option 2 of the Providence, RI Drafting Guide for instructions to Import a new Text File.

Legistar - Legislative Files (Edit Record Mode)

Save | Search | New | Clear | Unlock | Edit | Tools | Browse | Reports | Help

EZ Text Search

File ID: 25-039 ID: Type: Resolution Status: Approval Review

Meeting Type: City Council File Created: 10/14/2025

Title: The Narragansett Electric Company Easement - 675 Plainfield Street. Agenda Date: 11/6/2025

Final Action

Agenda Title/Recommendation Attachments (4) Associations Details Approval Tracking (5) Minutes History

Edit | New | Delete | View | Import...

Version: 1 | 1 [Current] | Set as Current

**.title**  
**.recommendation**  
 Resolution Requesting an easement on behalf of The Narragansett Electric Company, a domestic utility currently doing business as Rhode Island Energy, over, under and across a portion of city-owned land located on Assessor's Plat 111, Lot 92 (675 Plainfield Street). **This is the new document that we are uploading back into Legistar.**

- Click the **Attachments** tab to review the attached documentation. To open a document, **double-click on the attachment name** in the grid, or highlight the attachment and click **Launch** from the bottom left toolbar.

After opening or launching an editable format attachment, you can edit the document. To save your changes back to Legistar, click the **Save icon** and **close** out of the attachment.

**NOTE:** Changes made to attachments in Legistar do NOT update the local copy saved to your local drive.

Other actions you can take on this tab are:

- Click **Attach** to add additional documentation.
- Rename attachments in the **Name** field, then click the **Update Attachment Details** button.
- Update or add notes for a specific attachment in the **Internal Notes** field, then click the **Update Attachment Details** button.
- **Replace** attachments with the **Replace** button.
- **Delete** attachments by clicking the **Remove** button; the arrow on this button will also give you the option to **Remove All** attachments at once.
- **Reorder** the attachments list with the up and down arrows next to the grid.

The screenshot displays the Legistar Legislative Files (Edit Record Mode) interface. The 'Attachments' tab is selected, showing a list of attachments. The attachment 'City Council Minutes' is highlighted. The 'Internal Notes' field contains the text 'Notes are internal and not visible on any document/report'. The 'Attached On' field shows '10/14/2025' and 'Time: 1:37 PM'. The 'File Type' is 'DataFile' and 'File Size' is '59 KB'. The bottom toolbar includes 'Attach', 'Launch', 'Replace', 'Remove', and 'Update Attachment Details'.

- Click the **Associations** tab to review any potential selections. If any Associations need to be added or removed, click **Edit** for that section, move Associations left or right as needed. Click **Save**, then **Close**.
- Review the **Details** tab for any pertinent information. Update the tab as needed.

## Step 2: Acting on a File

After reviewing a File and making any potential edits, Approvers are ready to act on the File. The actions Approvers can take are [Approving, Disapproving, or Delegating]. Each Approver can only take one action.

## Approving a File

To **Approve** a File:

1. Click the **Approval Tracking** tab in the lower right when you are done reviewing and editing and are ready to act on the Agenda Item. Confirm that your name is green in the list, indicating that you are the active Approver. **Highlight your name in the grid** with a single click.
2. Click the **Approver Action** tab in the lower right. From this tab you can enter a **Note** (optional for Approving), then click the **Approve** button to approve the File. Click **Yes** in the confirmation pop-up to complete your Approver Action.

The screenshot displays the Legistar Legislative Files (Edit Record Mode) interface. The top navigation bar includes 'Save', 'New', 'Clear', 'Unlock', 'Edit', 'Tools', and 'Browse'. The main content area shows file details: File ID 25-039, Type Resolution, Status Approval Review, Meeting Type City Council, and Title The Narragansett Electric Company Easement - 675 Plainfield Street. The 'Approval Tracking' tab is selected, showing a table of approvers. The first approver, Manny Sanchez, is highlighted in green. The 'Approver Action' tab is also visible, showing a note field and an 'Approve' button.

Seq #	Approver Name	Due Days	Action Type	Email Template	Status	Due Date	Action	Action Date	Escalation Date	Notes
01	Granicus Approver	2	Approver	Individual Review Request	Escalated for Inaction	10/17/2025				No
02	Manny Sanchez	1	Approver	Individual Review Request	Escalated Review Req...	10/16/2025				Yes
03	Granicus Training	2	Approver	Individual Review Request						No
04	Granicus Implementation	2	Approver	Individual Review Request						No
05	Granicus Training	0	FYI	FYI Notification						No

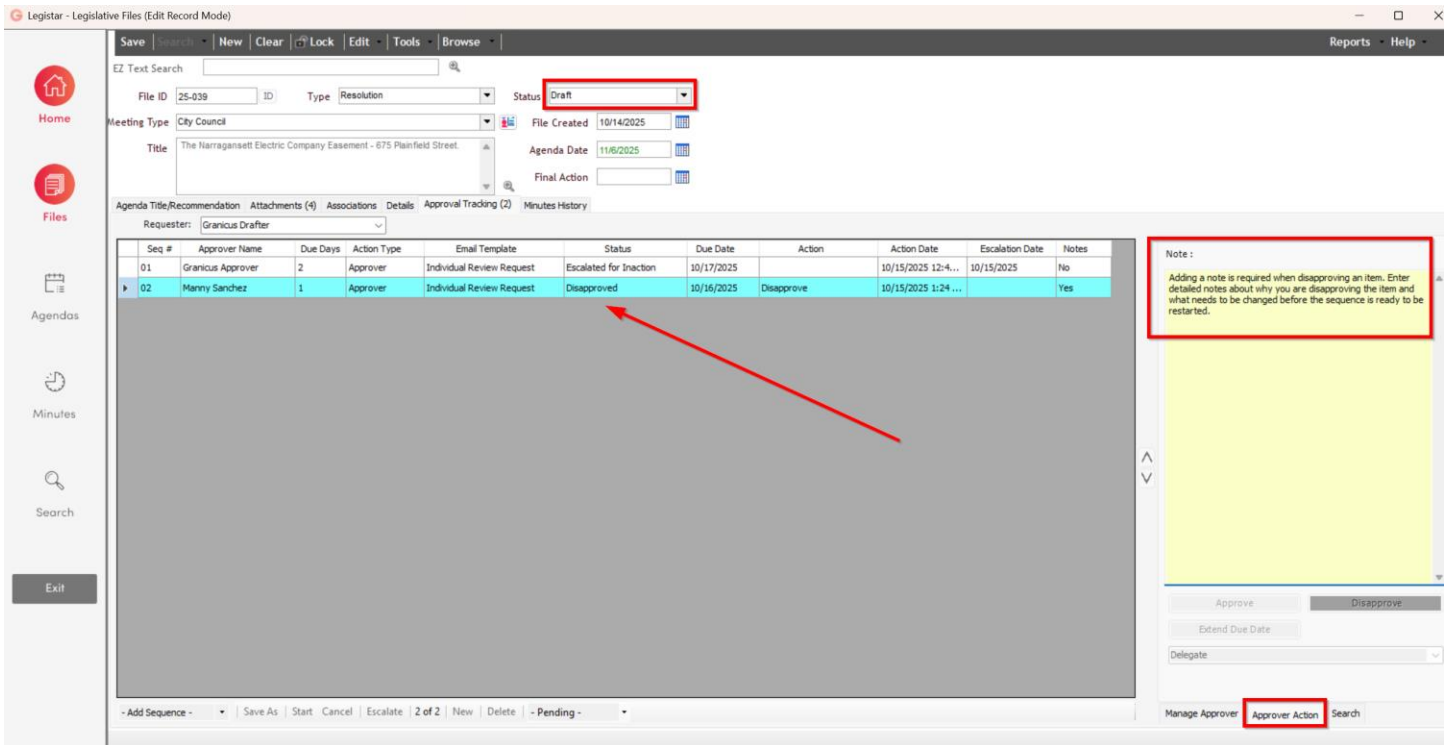
After you confirm your action, you can no longer edit this File. If there are more Approvers after you, the status of the File will remain **Approval Review** and the next Approver in the sequence is the only Approver that has access to edit and act on the File or Approval Sequence.

If you were the last Approver in the sequence, the status of the item will change to **Agenda Ready**.

## Disapproving a File

If you **Disapprove** a File, Legistar requires you to enter notes about why you're disapproving the Agenda Item. The status of the File will change back to **Draft**. Legistar will send emails to the Drafter and previous Approvers informing them that the File has been Disapproved. After the Drafter has received the disapproved Agenda Item back, they can read the Approvers' notes, make the necessary changes, add a new Approval Sequence, and re-submit the File for approval. To **Disapprove** a File:

1. On the Approval Tracking tab, click the **Approver Action tab** in the lower right. Confirm that your name is green in the list, indicating that you are the active Approver. **Highlight your name in the grid** with a single click.
2. **Entering a Note is required when Disapproving.** In the **Notes** field, enter details as to why you are disapproving and what changes need to be made. Be as detailed as possible.
3. Click the **Disapprove** button.



4. Click **Yes** at the confirmation pop-up message. The status will change from Approval Review to **Draft**, and the Drafter will be notified via email. The Drafter will be in control of the File until a new Approval Sequence is started.

**NOTE:** Any Approvers who were coming up in the sequence and had not yet been notified of the Agenda Item will be removed from the workflow. Only Approvers who had previously taken an action will have their historical record and notes retained in the workflow grid.

## Delegating a File

Approvers can Delegate their turn to review, edit, and take an action on the Agenda Item to another eligible Approver in the database. To **Delegate** a File:

1. On the Approval Tracking tab, click the **Approver Action tab** in the lower right. Confirm that your name is green in the list, indicating that you are the active Approver. **Highlight your name in the grid** with a single click.
2. Entering a **Note** is optional when Delegating; however, it is *highly recommended* to provide the delegate Approver with as much information as possible. In the **Notes** field, enter details about why you're delegating the Agenda Item and any applicable instructions.

Legistar - Legislative Files (Edit Record Mode)

Save | Search | New | Clear | Unlock | Edit | Tools | Browse | Reports | Help

EZ Text Search

File ID: 25-039 ID Type: Resolution Status: **Approval Review**

Meeting Type: City Council File Created: 10/14/2025

Title: The Narragansett Electric Company Easement - 675 Plainfield Street. Agenda Date: 11/6/2025

Final Action

Agenda Title/Recommendation Attachments (4) Associations Details: **Approval Tracking (3)** Minutes History

Requester: Granicus Drafter

Seq #	Approver Name	Due Days	Action Type	Email Template	Status	Due Date	Action	Action Date	Escalation Date	Notes
01	Granicus Approver	2	Approver	Individual Review Request	Escalated for Inaction	10/17/2025		10/15/2025 12:4...	10/15/2025	No
02	Manny Sanchez	1	Approver	Individual Review Request	Disapproved	10/16/2025	Disapprove	10/15/2025 1:24 ...		Yes
03	Manny Sanchez	2	Approver	Individual Review Request	Review Requested	10/17/2025				No

Note:

Select the approver you want to delegate your sequence to. This will send them an email, letting them know they are next up to review and approve this item.

Approve Disapprove

Extend Due Date

Delegate

Granicus Approver

Granicus Implementation

Granicus Training

Jane Addams

Manny Sanchez

Tina Mastroianni

- Use the **Delegate drop-down menu** to select the desired delegate Approver.
- Click **Yes** at the confirmation window. The new Delegate Approver will appear in the grid as the active Approver, and the former Approver will have a record that their turn is complete. The Drafter and newly delegated Approver will receive emails about the delegation.

After you confirm your action, you can no longer edit this File. The status of the File will remain **Approval Review** and the Delegate Approver in the sequence is the only Approver that has access to edit and act on the File or Approval Sequence.

Legistar - Legislative Files (Read Only Mode)

Save | Search | New | Clear | Unlock | Edit | Tools | Browse | Reports | Help

EZ Text Search

File ID: 25-039 ID Type: Resolution Status: **Approval Review**

Meeting Type: City Council File Created: 10/14/2025

Title: The Narragansett Electric Company Easement - 675 Plainfield Street. Agenda Date: 11/6/2025

Final Action

Agenda Title/Recommendation Attachments (4) Associations Details: **Approval Tracking (4)** Minutes History

Requester: Granicus Drafter

Seq #	Approver Name	Due Days	Action Type	Email Template	Status	Due Date	Action	Action Date	Escalation Date	Notes
01	Granicus Approver	2	Approver	Individual Review Request	Escalated for Inaction	10/17/2025		10/15/2025 12:4...	10/15/2025	No
02	Manny Sanchez	1	Approver	Individual Review Request	Disapproved	10/16/2025	Disapprove	10/15/2025 1:24 ...		Yes
03	Manny Sanchez	2	Approver	Individual Review Request	Delegated		Delegate	10/15/2025 11:32 ...		No
04	Granicus Approver	2	Approver	Individual Review Request	Delegated Review Req...	10/17/2025				No

Note:

Approve Disapprove

Extend Due Date

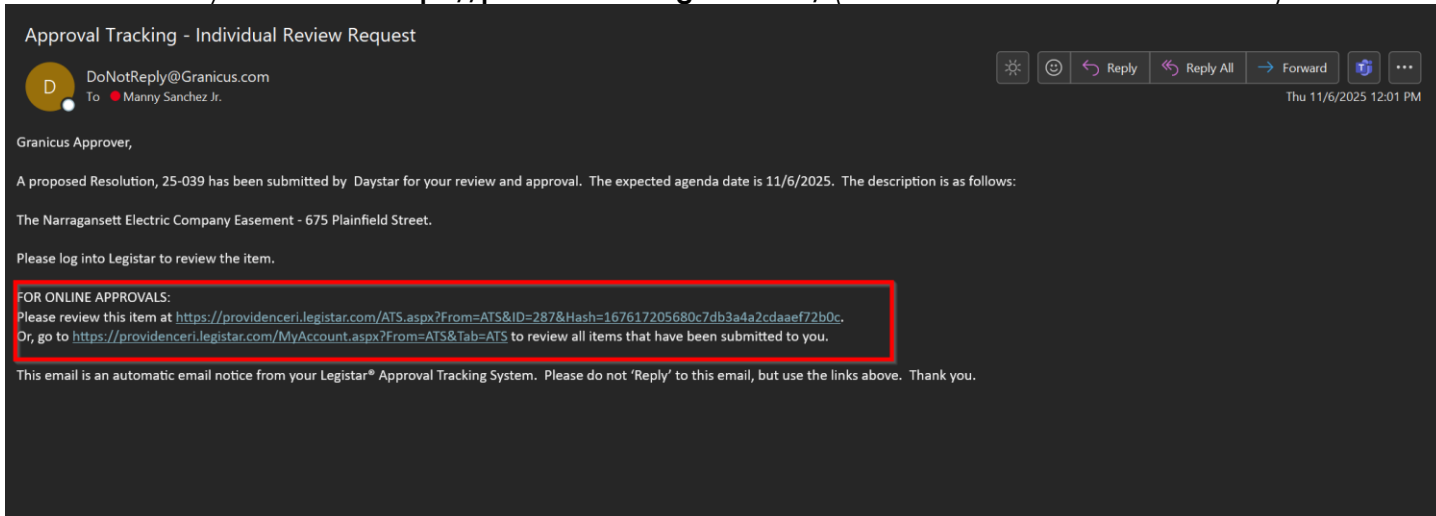
Delegate

Manage Approver Approver Action Search

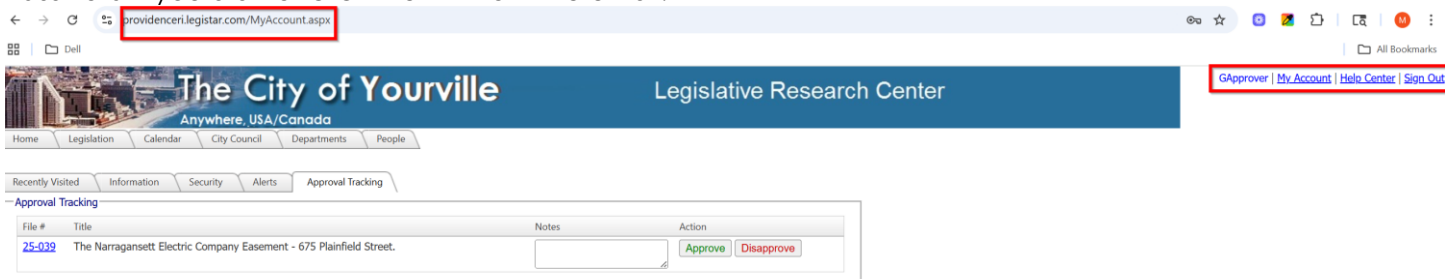
## Reviewing a File on the Web

As an alternative to logging into Legistar, reviewers can access a web-based reviewer screen on your public facing InSite webpage.

1. Navigate to your InSite webpage by clicking the link in your approval notice email or by entering the web address in your browser: <https://providenceri.legistar.com/> (remember to leave off the "www").



2. Sign in after clicking the link or click **Sign In** in the top right corner using your **Legistar Username and Password** if you did not click the link from the email.



3. Click the **Approval Tracking** tab. If you don't see that tab, click the **My Accounts** link in the top right corner to pull it up.
4. You can click **Approve** or **Disapprove** from this page if you're already familiar with the contents of the file. If you need to review the file, click the **File ID** of the item you would like to review.
5. Review the information on the screen. Please note that some of the InSite language is different from the language in your Legistar Files Module
6. To **make changes to the Staff Report** using Microsoft Word, Click **Download Word document** to view the **Agenda Item Body** text and other item details.

Home Legislation Calendar City Council Departments People

File #: 25-039  
 In control: City Council  
 Requester: Daystar  
 Type: Resolution  
 Agenda date: 11/6/2025  
 Due date: 11/10/2025

Title: The Narragansett Electric Company Easement - 675 Plainfield Street.

Legislation text: [Download Word document](#)

NOTE - It is recommended that all changes to the Word Text file be made in Legistar

After downloading and editing the Word document, please make sure to select your updated file in the field below and then hit Submit when you are done with this approval request.

Select

Existing attachments:

Name	
Legistar Drafting with File Assign and Versioning.docx	Edit View X
Legistar MediaManager Administration Final Sept2021 (1).docx	Edit View X
City Council Minutes	Edit View X
Viewing Agendas and Agenda Items in Legislate _ Granicus Support.pdf	Edit View X

Add new attachments:

Select

Notes:

Action: -Select- Delegate to:

Submit View Sequence Send E-mail

<<< Go Back

- Once the Word document downloads, you can review the Agenda Item Body details. It is recommended that changes to the Microsoft Word document (Agenda Title/Recommendation) only be made in Legistar, and not via the website.
- If changes are made to the Word Document, you will need to **Save** the edited document to your local device and then upload the updated Word document by clicking **Select**, navigating to your file, then selecting **Open**.
- If you upload a new Word Document, you must **choose an action**, then click **Submit** at the bottom of the page for the changes to be reflected in Legistar.

File #: 25-039  
 In control: City Council  
 Requester: Daystar  
 Type: Resolution  
 Agenda date: 11/6/2025  
 Due date: 11/10/2025

Title: The Narragansett Electric Company Easement - 675 Plainfield Street.

Legislation text: [Download Word document](#)

After downloading and editing the Word document, please make sure to select your updated file in the field below and then hit Submit when you are done with this approval request.

25-039 - Updated File.dotx x Remove

Select

NOTE: Updated version of the staff report I have downloaded, edited, and saved locally and selected to upload. It MUST be in a .dotx format!!

Existing attachments:

Name	
Legistar Drafting with File Assign and Versioning.docx	Edit View X
Legistar MediaManager Administration Final Sept2021 (1).docx	Edit View X
City Council Minutes	Edit View X
Viewing Agendas and Agenda Items in Legislate _ Granicus Support.pdf	Edit View X

Add new attachments:

Select

Notes:

Action: -Select- Delegate to:

Submit View Sequence Send E-mail

<<< Go Back

- Click **View** to review attachments.
- Click **Edit** to modify attachment names.
- If you make any changes to an existing attachment or need to upload a new attachment, do so using the **Add new attachments** field. **Delete the existing attachment** by clicking the **X** at the end of the Existing Attachments grid.

**NOTE:** If you upload a new attachment, you must choose an **Action**, then click **Submit** for the changes to reflect in Legistar. (see photo below)

File #: 25-039  
In control: City Council  
Requester: Daystar  
Type: Resolution  
Agenda date: 11/6/2025  
Due date: 11/10/2025  
Title: The Narragansett Electric Company Easement - 675 Plainfield Street.  
Legislation text: [Download Word document](#)

After downloading and editing the Word document, please make sure to select your updated file in the field below and then hit Submit when you are done with this approval request.

Existing attachments:

Name	
<a href="#">Edit</a> <a href="#">View</a>	Legistar Drafting with File Assign and Versioning.docx
<a href="#">Edit</a> <a href="#">View</a>	Legistar MediaManager Administration Final Sept2021 (1).docx
<a href="#">Edit</a> <a href="#">View</a>	City Council Minutes
<a href="#">Edit</a> <a href="#">View</a>	Viewing Agendas and Agenda Items in Legislate _ Granicus Support.pdf

Add new attachments:

Notes:

Action:  Delegate to:

1. Enter any **Notes** if needed. You must enter a Note before selecting an Action.
2. Use the **Action** drop-down menu to select your approval action: *Approve*, *Delegate* or *Disapprove*. Extend Due Date is not an option for Approvers.
3. Click **Submit**.

File #: 25-039  
In control: City Council  
Requester: Daystar  
Type: Resolution  
Agenda date: 11/6/2025  
Due date: 11/10/2025  
Title: The Narragansett Electric Company Easement - 675 Plainfield Street.  
Legislation text: [Download Word document](#)

After downloading and editing the Word document, please make sure to select your updated file in the field below and then hit Submit when you are done with this approval request.

Existing attachments:

Name	
<a href="#">Edit</a> <a href="#">View</a>	Legistar Drafting with File Assign and Versioning.docx
<a href="#">Edit</a> <a href="#">View</a>	Legistar MediaManager Administration Final Sept2021 (1).docx
<a href="#">Edit</a> <a href="#">View</a>	City Council Minutes
<a href="#">Edit</a> <a href="#">View</a>	Viewing Agendas and Agenda Items in Legislate _ Granicus Support.pdf

Add new attachments:

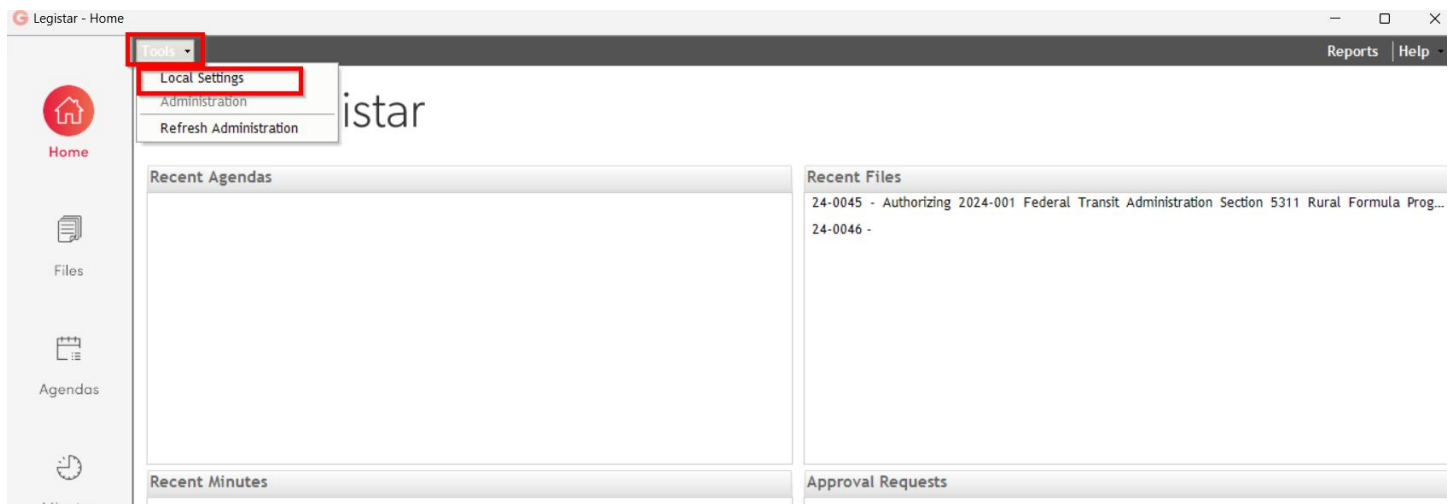
Notes:

Action:  Delegate to:

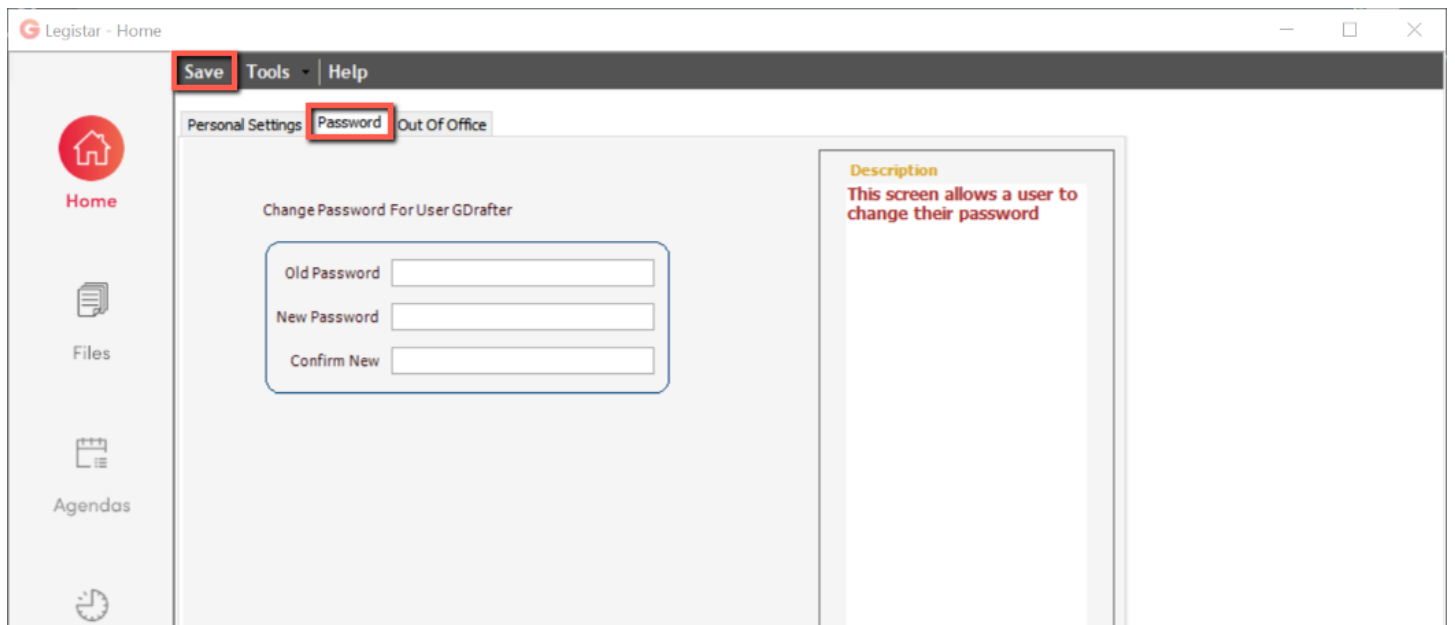
## Legistar Local Settings for Approvers

Each individual user has access to **Local Settings**. While there are many Local Settings available, the Local Settings detailed on this guide are specific to the needs of an Approver.

1. To access Local Settings, click the **Tools menu** on the **Home screen** and select **Local Settings**.



2. Change or reset your password on the **Password tab**. Enter your old (current) password, then your new password twice. **To be able to log into InSite your password must be 6 characters minimum.** There are not any character rules for setting your password, but please ensure it is something secure. **To apply changes, you must click Save.**



3. If you are going to be **out of the office**, you can assign another individual to receive any items that come to you during your out of office time. They will essentially be your "automatic delegate" to receive your items and act on them while you're away. Turn on/off your Out of Office setting on the **Out of Office tab**.
  - Change "Out of Office?" to **Yes** to turn on the out of office feature.
  - Select the **person** who should be your Alternate/"automatic delegate" while you are away.
  - **To apply changes, you must click Save.**
  - **Be sure to Refresh Administration when you go to the Home tab.**

When you are **back in the office**, you must remember to come back to this Local Settings and **set “Out of Office?” back to No, then click Save** to turn your out of office feature *off* and allow items to come to you again.

Legistar - Home

Save Tools Help

Personal Settings Password **Out Of Office**

Out of Office?  Yes  No

Alternate Approver Granicus BA

**Description**

Before you go out of office, enable the Out of Office status by selecting 'Yes' option to the left. You can either set who your alternate will be by selecting an approver from the drop-down list or you can set your approval to be 'auto approved' in the drop-down and go directly to the next person.

If you are assigned to an approval sequence while Out of Office, when the sequence reaches you, it automatically delegates to the alternate you have specified. Your alternate approver will receive a notification.

When you return, set your status to In Office by selecting 'No' for Out of Office.