

A) Technical & Access Readiness

- Legistar client installed and launches on all trainee PCs; Microsoft .NET present; auto-update check succeeds. **Verify:** Open Legistar; Help → About; confirm version and no startup errors.
- Network access allows Legistar to reach Granicus Cloud Services; agenda/minutes creation works without filtering or blocking. **Verify:** Generate a test agenda; confirm no network errors.
- User accounts created & assigned to correct security groups (Tools → Administration → System Security → User Accounts); login limit set as needed. **Verify:** New user can sign in.
- Sign-in mode clarified for users (“Local” vs “Remote”) per project guidance. **Verify:** Users instructed to select the correct option; spot-check a login.
- (If in scope) LiveManager / MediaManager / Legislate access provisioned for relevant roles. **Verify:** Named users can access required applications and see Events (and Encoders for iPad voting, if used).

B) Administration Setup (Core Data & Security)

- Government Bodies & Body Types created; mover/secondar rules set; “Show on Web” flags correct. **Verify:** Administration → Government Bodies; confirm bodies exist and visibility is correct.
- Office Members added to Primary Legislative body with correct terms/roles. **Verify:** Bodies → [Body] → Office Members tab.
- People records (users, officials, staff) added; photos/signatures optional. **Verify:** Administration → People; spot-check records.
- Legislative File Types and Auto-Numbering configured (including Enactment numbers, if used). **Verify:** Administration → Legislative Files → File Types & Auto Numbering.
- Annual numbering patterns confirmed for the current year (if applicable). **Verify:** Matches jurisdiction standards and rollover plan.
- Workflow Controls (Agenda Settings, Advanced Settings, Workflow Actions) and Approval Tracking Sequences configured for each body type. **Verify:** Administration → Workflow Controls; run a test ATS.
- Report Design (agenda/minutes reports, headers) reviewed and defaults set. **Verify:** Administration → Report Design.

- Security & permissions validated (groups can view/edit files & meetings for new bodies).
Verify: Test with a non-admin user.

C) Pre-Agenda & Agenda Generation

- Agenda Definitions & file status mapping finalized so **Generate** places items correctly.
Verify: Run a test generation and confirm placement by File Type/Status/Controlling Body/Agenda Date.
- Meeting calendar entries created (ideally a year out) to let drafters assign files to dates.
Verify: Agendas → Calendar shows scheduled meetings.
- Sample legislative files drafted and routed in ATS to “Agenda Ready” for test agenda.
Verify: Files show correct status; appear on generated agenda.
- No encrypted attachments on files that need to appear on generated agendas. **Verify:** Confirm attachment policy; regenerate without errors.

D) InSite (Public Portal) / Publishing

- Publish to InSite tested for agendas (PDF visible publicly when status is **Final**). **Verify:** Run agenda report to publish; confirm link on the portal.

E) LiveManager / MediaManager (if included in training scope)

- Export Data to MediaManager from the finalized test agenda; event appears in MediaManager. **Verify:** Tools → Export Data confirmation; event visible.
- Consent items marked (optional) to demonstrate block votes. **Verify:** Minutes module → Mark Consent; see visual indication on lines.
- “Update Agenda URL” accepted during export (enables agenda URL on viewer/iLegislate). **Verify:** Playback page shows agenda URL.
- Completed end-to-end dry run (Legistar → LiveManager during meeting → import back to Legistar → finalize). **Verify:** Checklist followed in order.

F) iLegislate (if included)

- Legislate installed on target devices (iPad/Windows/Mac). **Verify:** App opens; user can sign in.
- Platform prerequisites met (Open Platform + appropriate suite; user permissions to Events—and Encoders for iPad voting; required network ports available). **Verify:** Access confirmed; ports 80/443 for sync, 1935 for video, 2012 for voting as applicable.

- Pre-Legislate workflow documented for trainees (how agendas flow from Legistar/MediaManager to the app). **Verify:** Trainers have a 1-pager or slide.