

# Resolutions Work Flow

(Simplified)

Resolutions is primarily a Laserfiche Work Flow process. It starts with a Form; but for the most part participants will be working in the Repository. In a nutshell, the process is like this:

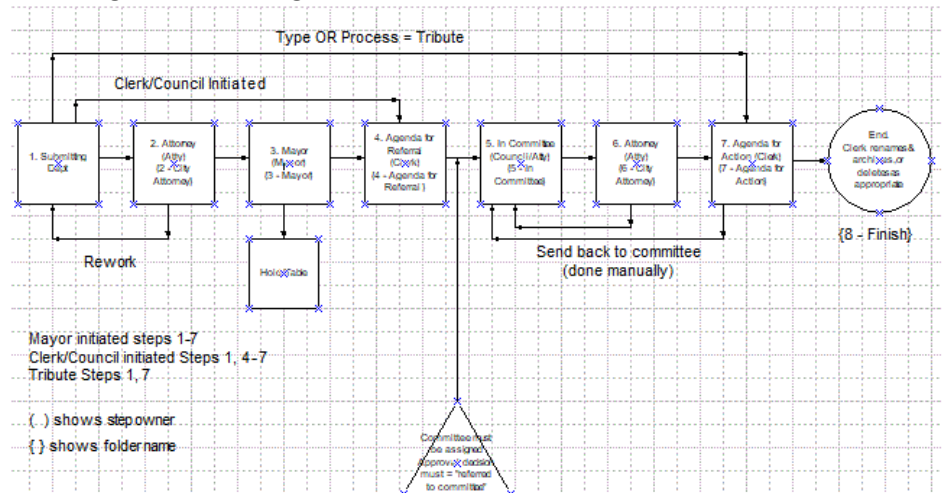
1. Download a template. A template is a blank form in Word format. It contains the proper wording and information for a given purpose.
2. Fill out and save the template locally.
3. Open a Resolutions submission form. Fill it out, attach your saved template and any other documentation that might be required, and submit it.
4. Now go to your department's folder in the repository, make sure all necessary documents are attached, and approve the resolution into Work Flow.
5. Work flow will step the documents sequentially through a pre-determined series of approvers based on the resolution type.
6. After being approved or denied, it will be saved to the repository.

## Starting a Resolution in Laserfiche

1. Downloading a template:
  - a. Using your favorite web browser, go to the Laserfiche Landing page at: <https://edocs.lansingmi.gov>
  - b. Click the button for Resolution Templates. You will be required to sign into the repository. Your Username is **Lansing\<your userid>** and your password is your regular Active Directory password.
2. Select the template you want and **Edit** using Word, then save it to your local computer.
3. Now go back to your web browser. There should be a tab still open for the Landing Page. Click on **Start Resolution**.
  - a. Fill out the form and attach the template you filled out.
  - b. Also attach any documents that will be needed to support the resolution. When everything looks complete, click the Submit button.
4. Going back to the repository (the tab should still be open from selecting your template,) and in the left pane, browse to your department's folder under Resolutions.
  - a. Resolutions\01 – Pending Approval\<your department>\Resolution – PEND-xxxx - <title>
  - b. Review all the documents in the folder and verify that everything is included and correct.
  - c. If everything looks good, then go to the right pane, make sure Fields is selected, and use the slide bar to go to the bottom. There, you will see an approval field. The contents will read: **“Please Select an Approval Decision.”**
  - d. Change the approval field to **“Approved”** and click **OK**.
5. The new resolution will now move out into the main work flow.

## Approving a Resolution

1. See the block diagram for routing:



2. Once the resolution has been submitted into work flow, the documents are stepped from one step to the next, eventually ending up in front of council. At each step, the queue's members will receive an email notification, and someone in the group must approve the resolution before it can proceed. This is done in the same way that the original submitter approved it into work flow:
  - a. Use a web browser and browse to <https://edocs.lansingmi.gov>
  - b. Open the repository by clicking on **Resolution Work Flow**.
  - c. Browse to the folder you want. Under Resolutions\01 – Pending Approval, the approving steps are numbered as well as named. 2 – City Attorney, 3 – Mayor, etc.
  - d. You can bypass a through d by clicking the hyperlink in your notification.
  - e. Open the documents and review until you are ready to make an approval decision. If you need to sign a document, this is when you do it. Laserfiche lets you 'sign' documents by applying a signature stamp. *You can only sign .TIF files.*
  - f. To make your approval decision, you will change the approval field as follows:
    - i. Single click on the folder for your resolution, to put focus on it. *Do not open the folder.*
    - ii. Click the metadata icon at the top of the screen, or right-click on the folder and choose "Metadata."
    - iii. In the right pane, use the slide bar and go all the way to the bottom of the information.
    - iv. Find the Approval Field and select a new approval choice. Note: the approval choice to approve a resolution into committee is **Referred to Committee**, with a committee designated. For all other steps it is **Approved**.
    - v. Click OK.
3. The Clerk is the 'traffic cop' of the process and will probably be the best resource in case of questions.

## **Timelines**

The default setting is 3 days to approve a resolution at any given step before it is designated as “overdue.” Beyond that are other standards:

- Submitter deadline – must be submitted 10 days before a council meeting.
- Attorney deadline 4:30 on Tuesday to make the Thursday Council meeting.