LiveManager User Guide

- LiveManager User Guide
  - Start Here
    - What is LiveManager?
    - Launching LiveManager 3.6 for the First Time
  - Preparing for a Meeting
    - Loading a Meeting
    - Removing a Meeting You Loaded by Mistake
    - Adding Attendees
    - Adding Speakers
    - Adding a New Agenda Item Before or During the Meeting
    - Editing Agenda Items
    - Deleting an Item from the Agenda or Minutes Panels
    - Searching for Agenda Items
  - Starting and Running a Meeting
    - Pausing, Extending, and Stopping the Meeting
    - Uploading a Meeting
    - Switching Meetings
    - Taking Roll Call
    - Calling a Speaker
    - Recording Notes
    - Timestamping an Agenda Item
    - Creating a Motion
    - Taking a Vote
    - Combining the Motion and Vote Workflows
    - Finalizing a Meeting
    - Working with Consent Agenda Items
  - Setup Menu Features
    - Changing Meeting Servers
    - Changing Configuration Profile

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LiveManager User Guide

LiveManager User Guide

LiveManager is the application used during the meeting. In LiveManager you can record and broadcast an event, timestamp items, and record notes, motions, and votes.

>> Expand/collapse the LiveManager User Guide

Start Here	This section provides an overview of the Admin tab, and includes the following sections: What is LiveManager? Launching LiveManager for the First Time
Preparing for a Meeting	This section discusses how to set up LiveManager in preparation for a meeting. It includes the following topics: Loading a Meeting Removing a Meeting Adding Attendees Adding Speakers Adding a New Agenda Item Editing Agenda Items Deleting Agenda Items Searching for Agenda Items
Running a Meeting	This section discusses running a meeting in LiveManager. It includes the following topics: Starting, Pausing, Extending, and Stopping a Meeting Uploading a Meeting Switching Meetings Taking Roll Call Calling a Speaker

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	Creating New Agenda Items Recording Notes Recording an Agenda Item Creating a Motion Taking a Vote Combining the Motion and Vote Workflows Finalizing a Meeting Working with Consent Agenda Items
Setup Menu Features	This section discusses the Setup menu. It includes the following topics: Changing Meeting Servers Changing Configuration Profile

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Start Here

Overview

This section includes best practices for this user guide, the MediaManager interface, and general workflows.

How to Use This Guide

Congratulations on your new Granicus solution! Before you get started, take a moment to review the guide and look for the following things:

Tips for Success

These tips are a collection of best practices and shortcuts for your Granicus solution. These tips, though not mandatory, help you use your Granicus solution as efficiently as possible.

Notes and Warnings

Additional information is found in the form of Notes and Warnings. These callouts contain important information you should know in regards to your solution.

References

Your user guide contains reference materials such as images, tables, and a glossary. Please study these reference materials to enhance your knowledge of your Granicus solution.

Content

The steps within this guide explain how to use your solution the way it was designed. However, your solution's interface or functionality may differ depending on your version of software or user guide.

Complete the tasks in this guide from beginning to end as they are written. Only follow any work-arounds as they have been assigned to you by Granicus staff.

Take the time to explore this user guide and your Granicus solution. The more you practice with your solution, the more efficient you'll become!

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What is LiveManager?

LiveManager is the application used during the meeting. The LiveManager application allows for full event control with the ability to start, stop, pause, and live index and annotate events. The application syncs with MediaManager software to share meeting metadata, allowing the client to edit their meeting recording in sync with their meeting documentation.

System Prerequisites

LiveManager will run on a variety of common workstations. Before getting started, please ensure that your computer has already been set up with the hardware and software outlined below.

Computer Requirements

Installation of LiveManager requires a Windows based PC with network connectivity to the Granicus Encoding Appliance.

PC Recommendations	· Pentium 4 or Newer · 2GB RAM · 20GB free Hard Drive space · Windows XP or Windows 7 (32-bit or 64-bit) · Ethernet Port for LAN Connectivity · Internet Explorer 8 or higher set as the default web browser
Installed Windows Components	· Microsoft .NET Framework 4.0
Installed Software	· Office 2003 or newer (full apps or viewers required for document reading) · Adobe Reader 10 or newer (for document reading)

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Network Requirements

The following table describes the network ports, connection direction, and communication protocols used by LiveManager. If the direction of the connection is outbound, the port indicates the port number of the application's remote host connection. If the direction of the connection is inbound, port indicates the port number of the application's local host listening for incoming connections.

Granicus IP Address Ranges	· 207.7.154.0/24 · 209.237.241.0/24
Outbound TCP Port 80, 85, 6969, & 8080	· To the Granicus Encoding Appliance for client application connectivity
Outbound TCP Port 80 & 443	· To Granicus for access to Granicus Platform

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Launching LiveManager 3.6 for the First Time

Complete the following steps to launch LiveManager 3.6 and set up a shortcut on your desktop:

1. Open Internet Explorer 8 (or higher).
2. Enter the URL that you receive from your Account Manager into the address bar. Your LiveManager URL is *http:// <the Encoder's internal IP address> :85/LiveManager*. You can receive more information on your LiveManager URL from your Account Manager.
3. Click **Options** on the LiveManager 3.6 Launch Page.
4. Click **Create Desktop Icon** after the LiveManager Configuration Editor opens.
5. Close the LiveManager Configuration Editor.

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Preparing for a Meeting

Before you run your meeting, you'll need to prepare for it. The topics below discuss how to set up LiveManager in preparation for a meeting. You'll need to load a meeting, add attendees and speakers, and add or edit agenda items if necessary.

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Loading a Meeting

Complete the following steps to load a meeting from the LiveManager interface:

1. Click **Load Meeting** (this is also known as the golden folder button). The Load Meeting menu appears. (Figure 1)

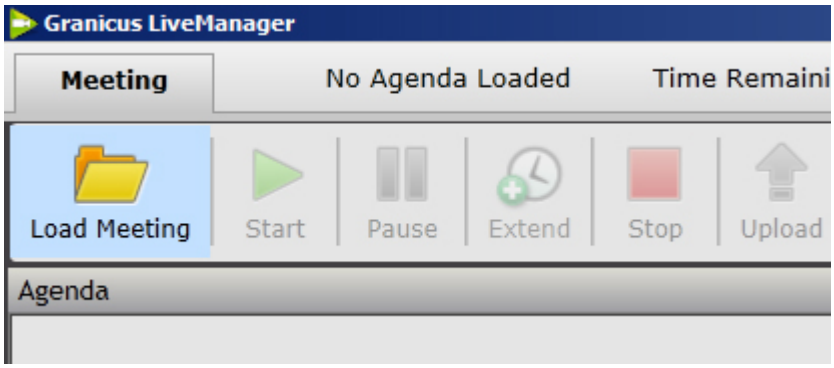
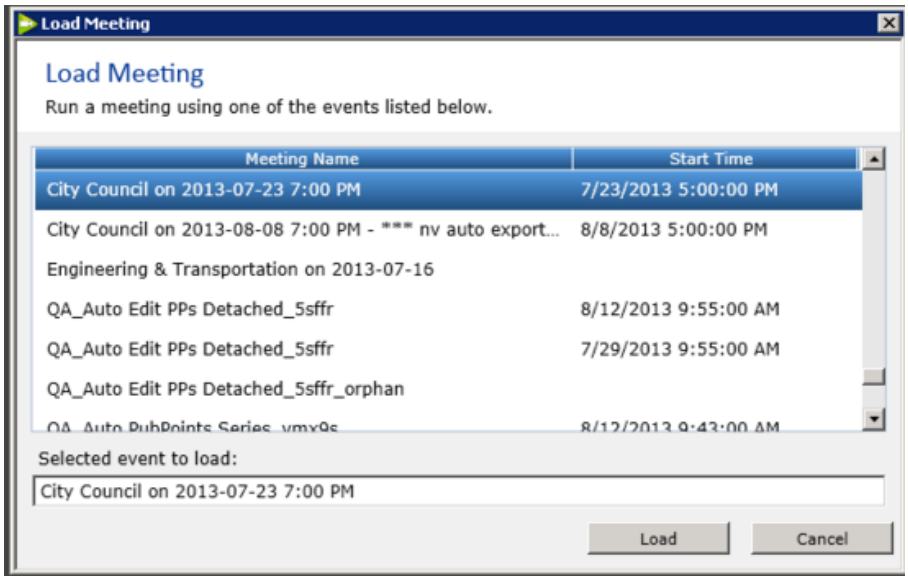


Figure 1 Load Meeting Button

2. Select a meeting from the list available. 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**. The meeting agenda loads in the Agenda pane.

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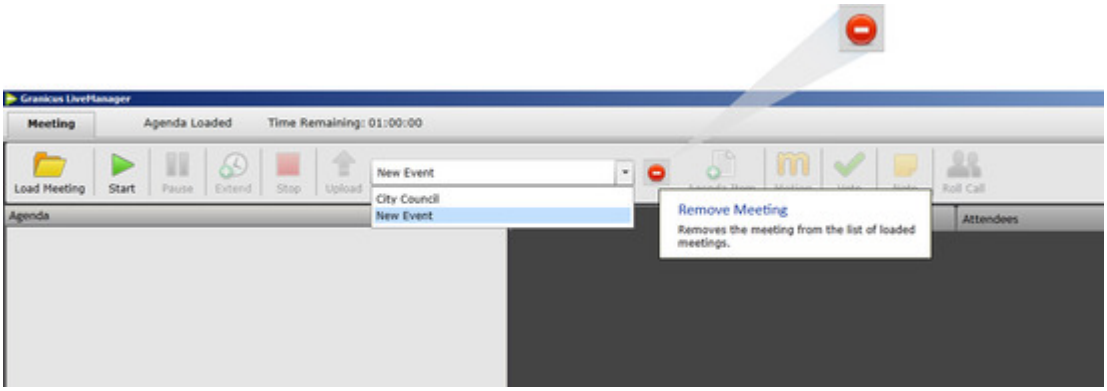
Removing a Meeting You Loaded by Mistake

If you accidentally load a meeting you don't want to run, you can remove it from the list of loaded meetings.

1. Select the **drop-down menu** with the list of loaded meetings.
2. Select the **meeting** you want to remove.
3. Click the **red circle** to delete the meeting from the drop-down menu.



Deleting a Meeting

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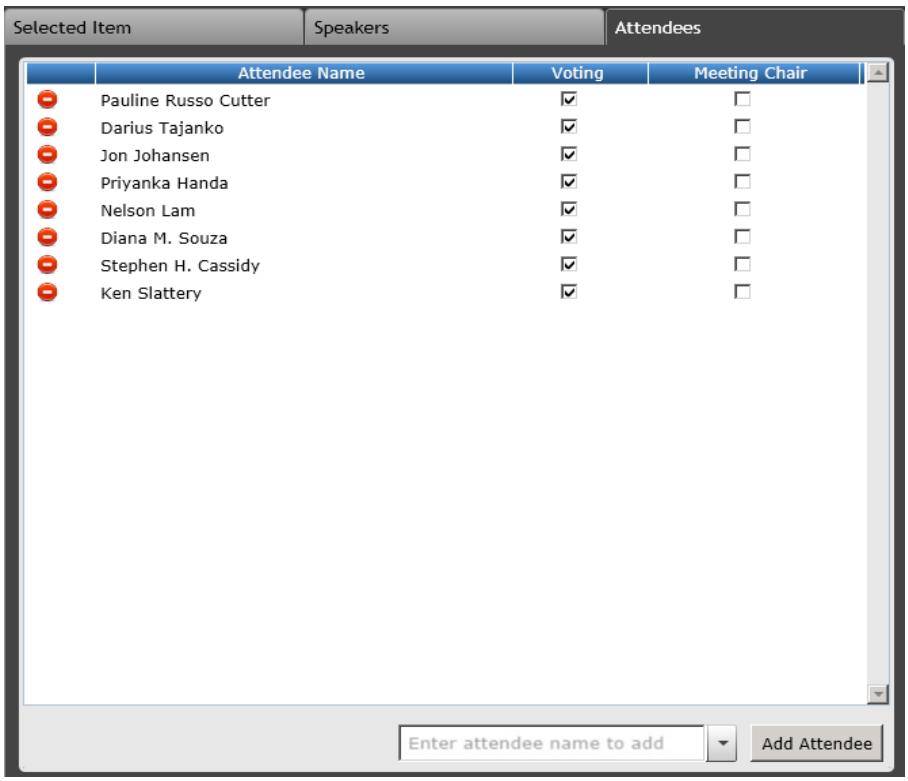
Adding Attendees

Note: The add attendees feature is only supported for Meeting Efficiency clients. If you'd like to upgrade or learn more about this feature, please contact your Account Manager.

If you need to add additional meeting members who were not added to the attendee list in MediaManager, complete the following steps:

1. Click the **Attendees** tab in the center panel.



2. To add an attendee, select a name from the **Enter attendee name to add** drop-down menu, then click **Add Attendee**.

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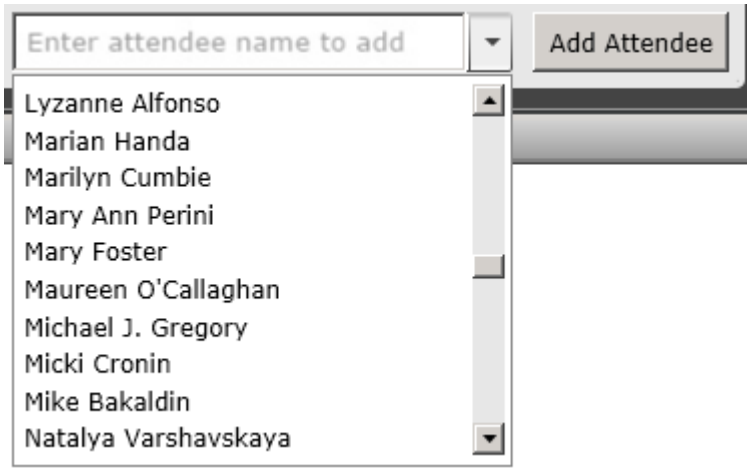

3. Select the **Voting** checkbox for the new attendee if he or she is voting during this meeting, and make sure this checkbox is selected for each voting member.

4. Select the **Meeting Chair** checkbox for the appropriate meeting member.

5. If necessary, click

   to remove an attendee from a meeting.

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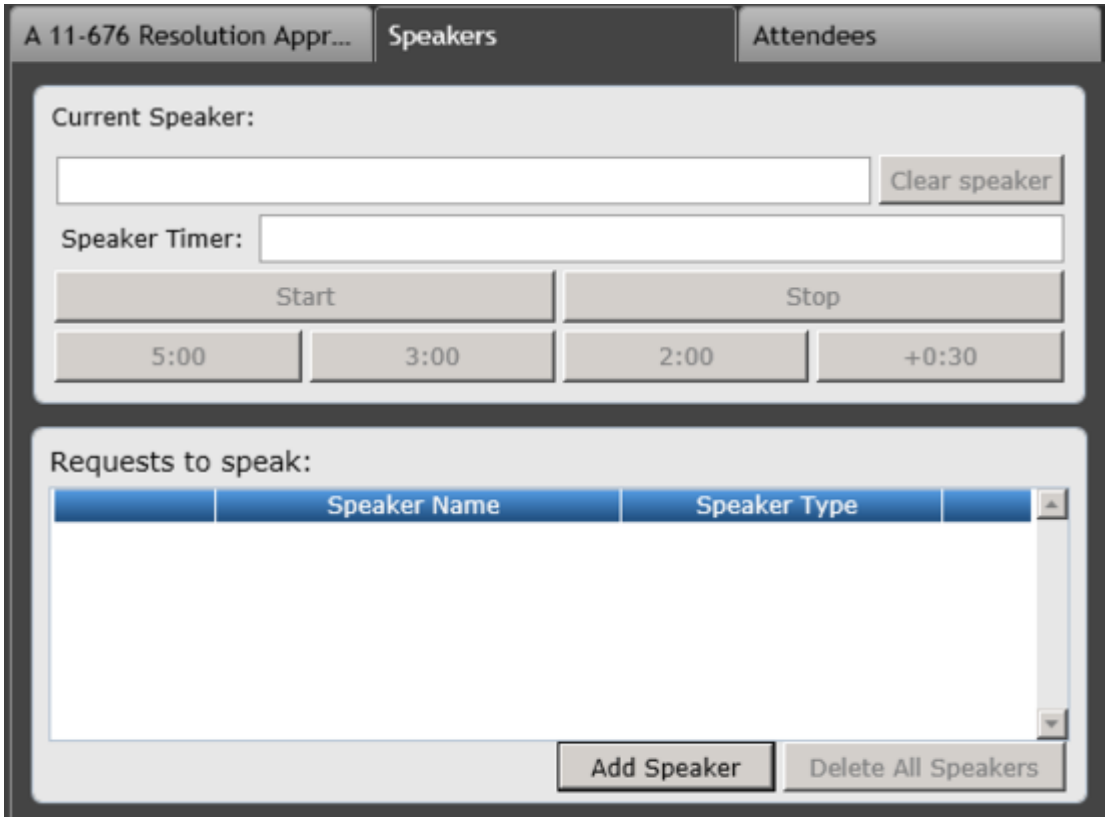
Adding Speakers

Note: Adding speakers is only supported for Meeting Efficiency clients. If you'd like more information or a demo, please contact your Account Manager.

You can add speakers before or during a meeting.

1. Select the agenda item (by clicking it once) to which you want to add a speaker or speakers.
2. Click the **Speakers** tab. The Speakers panel is displayed.



3. Click **Add Speaker**. The Add Speakers dialog is displayed.

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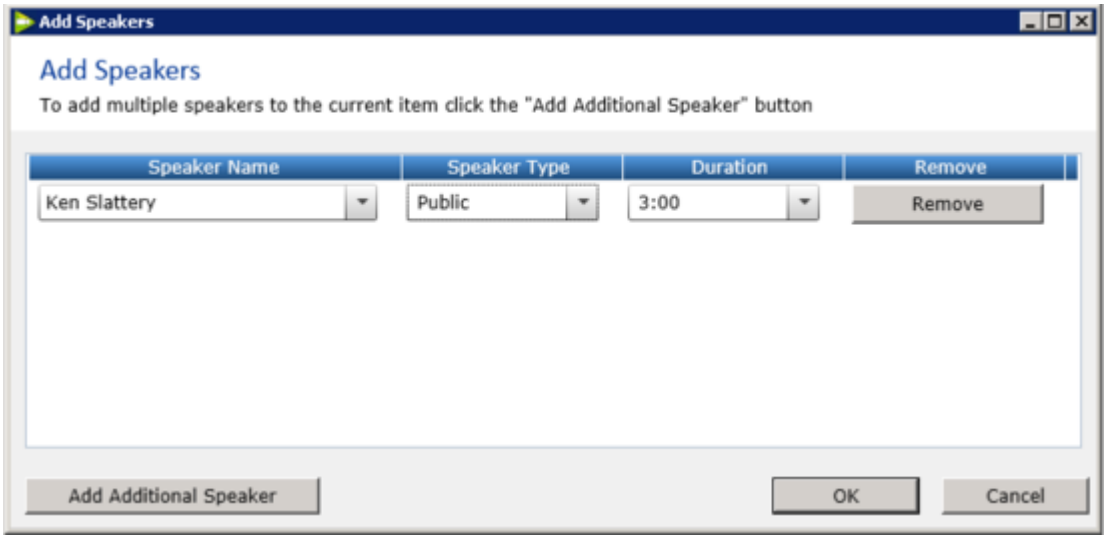


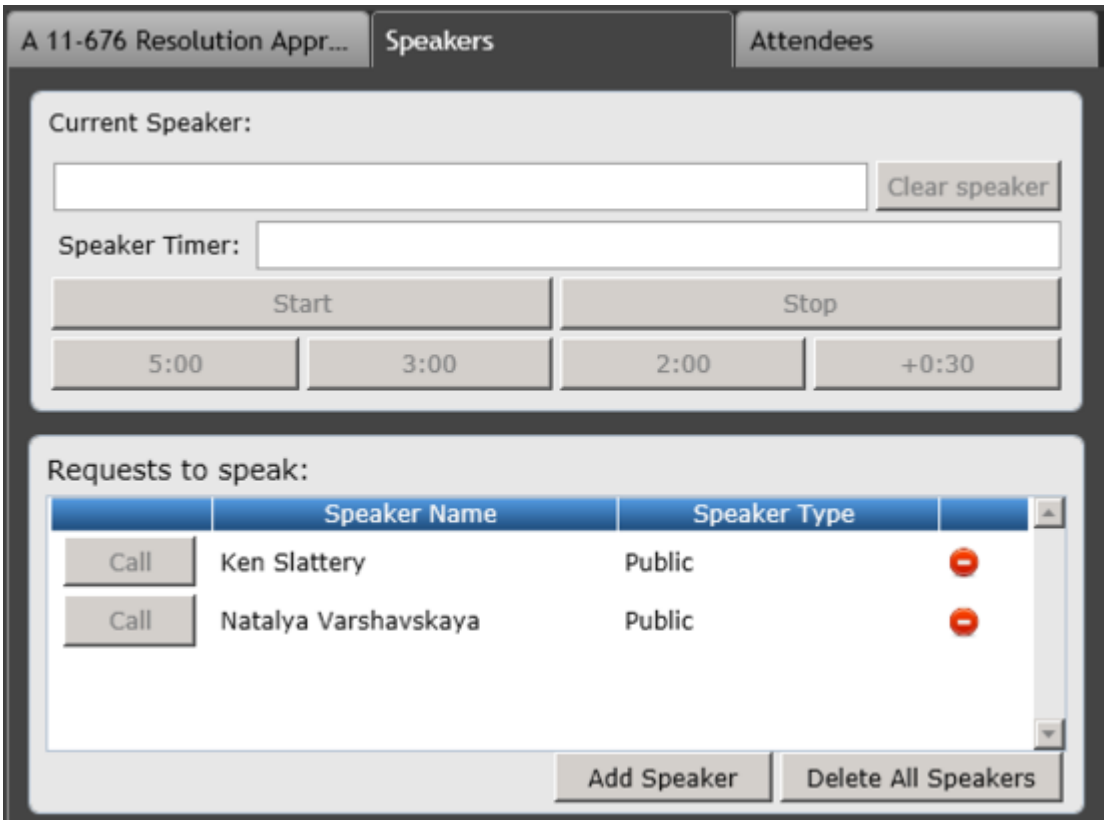
4. In the **Speaker Name** field, enter the name of a new speaker, or select an existing name from the drop-down menu. If a name has already been entered in the system, the name will auto-complete.

5. In the **Speaker Type** field, select **Public**, **Staff**,or **Elected Official**.

6. In the **Duration** field, designate an amount of time for the speaker. Note that you cannot specify an anount of time for the Elected Official speaker type.

7. 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.

8. Click **OK** when you have finished adding speakers.



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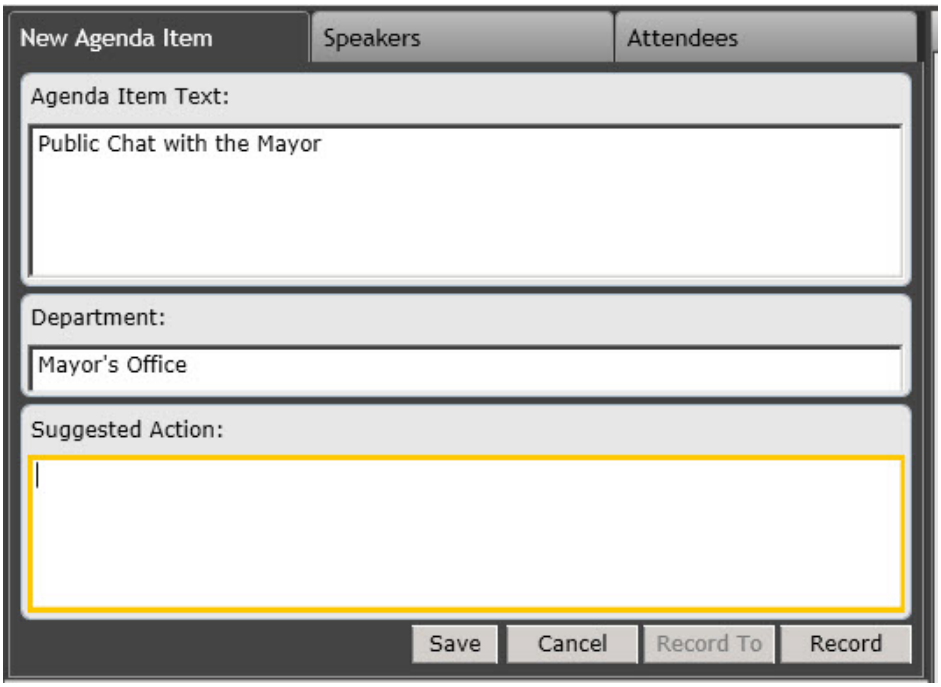
Adding a New Agenda Item Before or During the Meeting

You can add new agenda items before or during the meeting. However, this is a rare occurrence.

Complete the following steps:

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.



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.

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Notes:

You can edit existing agenda items before the meeting. Select the agenda item you want to edit from 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.

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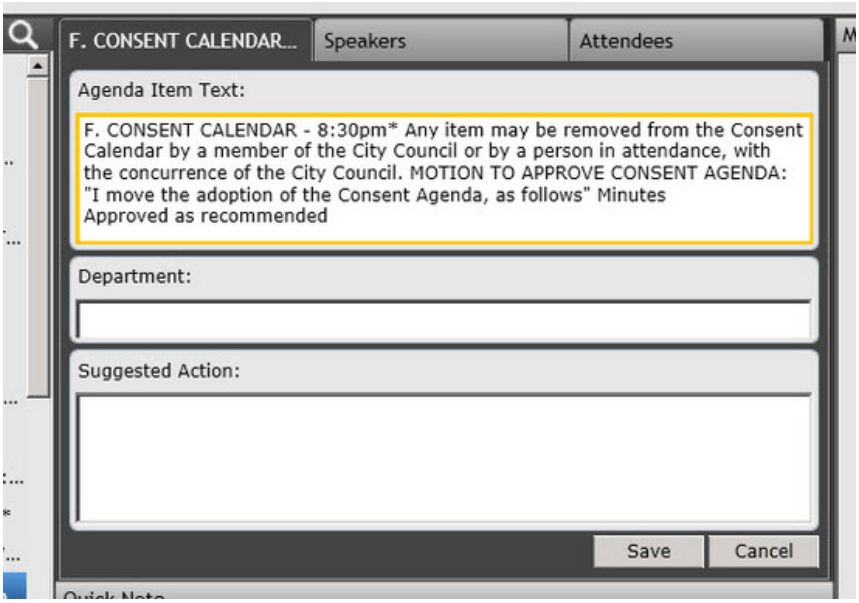
Editing Agenda Items

You can only edit existing agenda items before the meeting begins. It's possible to add new agenda items in LiveManager before the meeting is started but this is a rare occurrence.

1. Select an agenda item from the Agenda pane.
2. Click in the **Agenda Item Text** field and edit the available text.
3. Click **Save**, or press **Ctrl** + **S**. If no changes have been made to the agenda item, the Save button will be disabled.



Editing an Agenda Item

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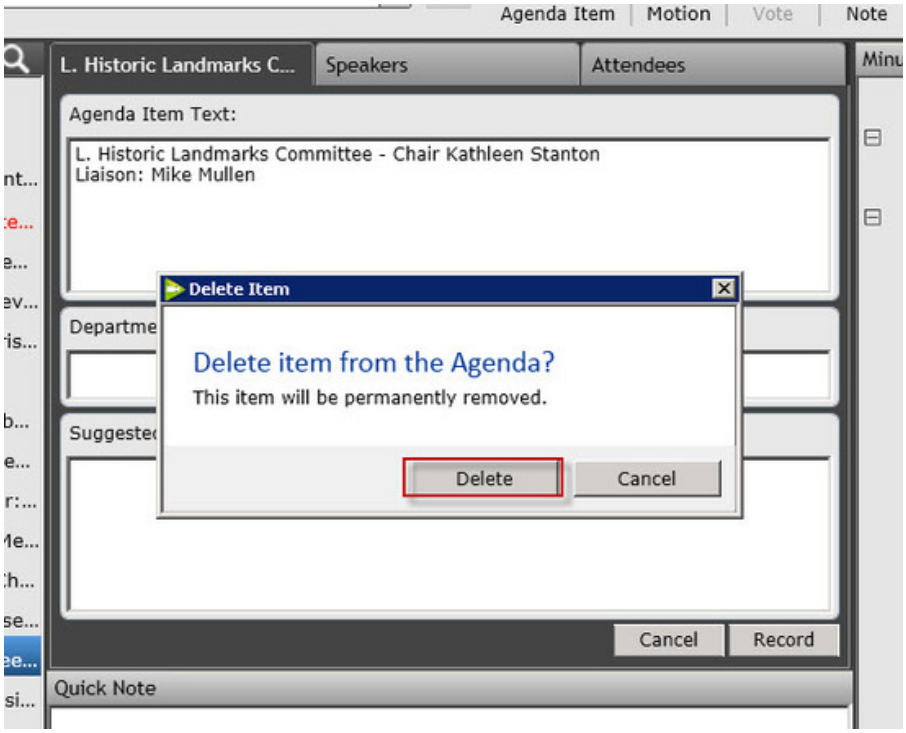
Deleting an Item from the Agenda or Minutes Panels

There are multiple ways to delete agenda items. Complete the following steps to erase an item from the Agenda or Minutes panels:

1. Select the item you wish to delete.
2. Press **Ctrl + D**, or right-click the **item** and select **Delete** from the context menu. The Delete Item dialog opens, asking if you are sure you'd like to delete the item.
3. Click **Delete**.



Deleting an Agenda Item

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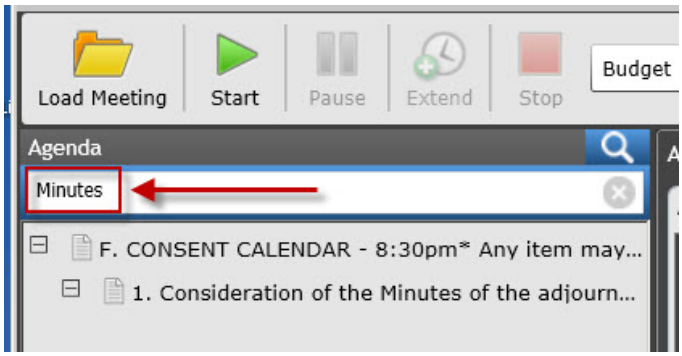
Searching for Agenda Items

You can search your agenda to help you quickly find specific agenda items.

1. Click the **Search Icon**

   at the top of the agenda. The search bar will open.

2. Enter text in the Search bar. The agenda will automatically update to show only agenda items containing the search terms you enter.



Searching an Agenda

3. Click the X on the right-hand side of the search textbox to clear the search results and return to the full agenda.

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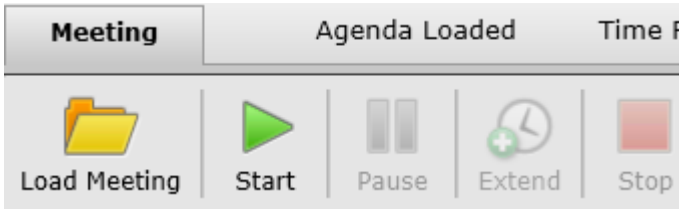
Starting and Running a Meeting

After you've prepared for your meeting, click **Start** to begin.



This section discusses running a meeting in LiveManager. You can timestamp agenda items, take roll call, call speakers, create motions and record votes, record notes, pause, extend, and stop the meeting, and finalize the meeting.

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Pausing, Extending, and Stopping the Meeting

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

  to resume the meeting when it reconvenes.

  Warning! If you pause your meeting while it is broadcasting live the meeting will continue to stream. Be sure to turn off cameras and microphones during this period.

- Click **Extend**

  or **Ctrl + E** to extend the meeting time by 30 minutes. When the timer is about to run out, you will receive a notification asking if you'd like to extend the meeting.

- Click **Stop**

  to finalize meeting details and end the meeting.

  Warning! Only use the Stop button when you are absolutely sure the meeting is over. You cannot restart the meeting after the Stop button is selected.

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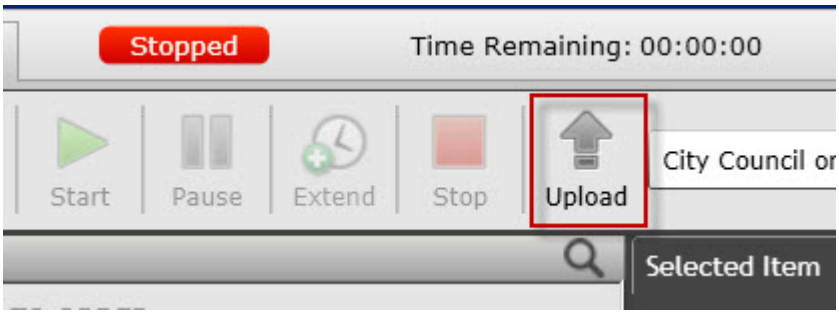
Uploading a Meeting

When you stop your meeting, the Minutes may automatically upload to MediaManager, creating a new archive, depending on your LiveManager profile. Please see the LiveManager Configuration Guide for instructions on changing this setting. If they do not automatically upload, complete the following steps:

1. Click **Upload**. The Finalize Meeting(s) dialog appears.



Upload button

2. Click **Finalize**. This will create a new archive using your meeting metadata.

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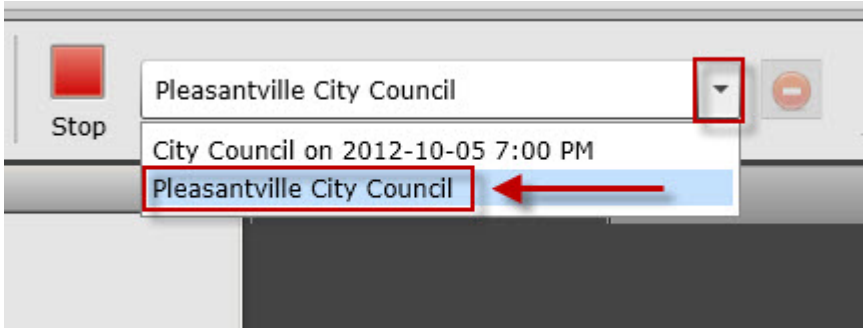
Switching Meetings

To switch between loaded meetings in LiveManager, just select the meeting from the menu available.



Selecting a New Meeting

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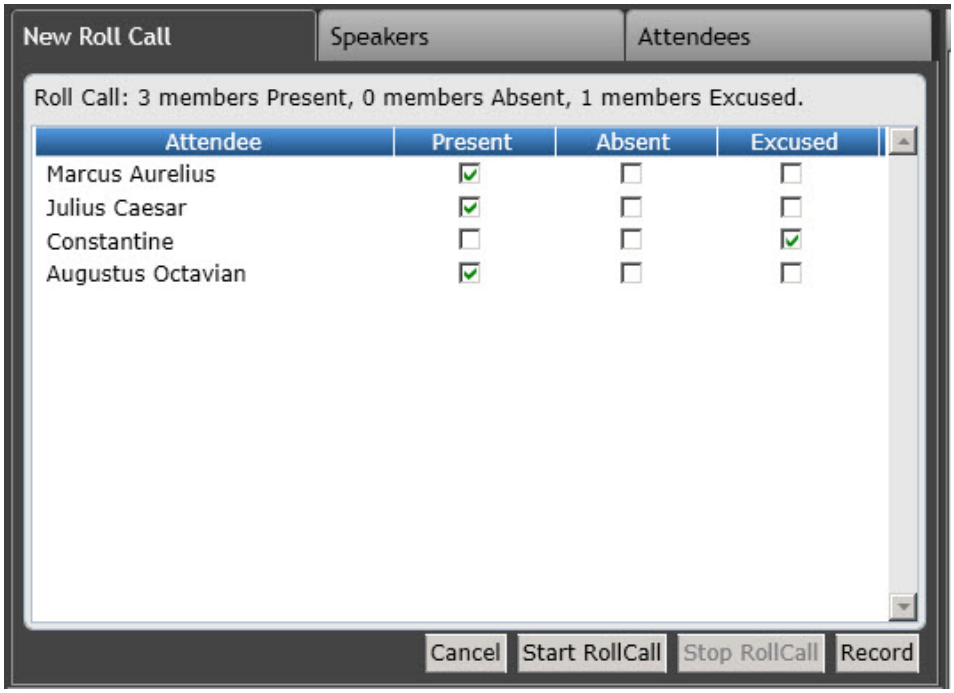
Taking Roll Call

The roll call feature is for Meeting Efficiency clients only. If you'd like more information, or to see a demo, please contact your Account Manager.

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

1. Click **Roll Call**, or press **Ctrl + R**.
2. Select the **Present**, **Absent**, or **Excused** option for each meeting member.
3. Click **Record** when you are finished.



Taking Roll Call

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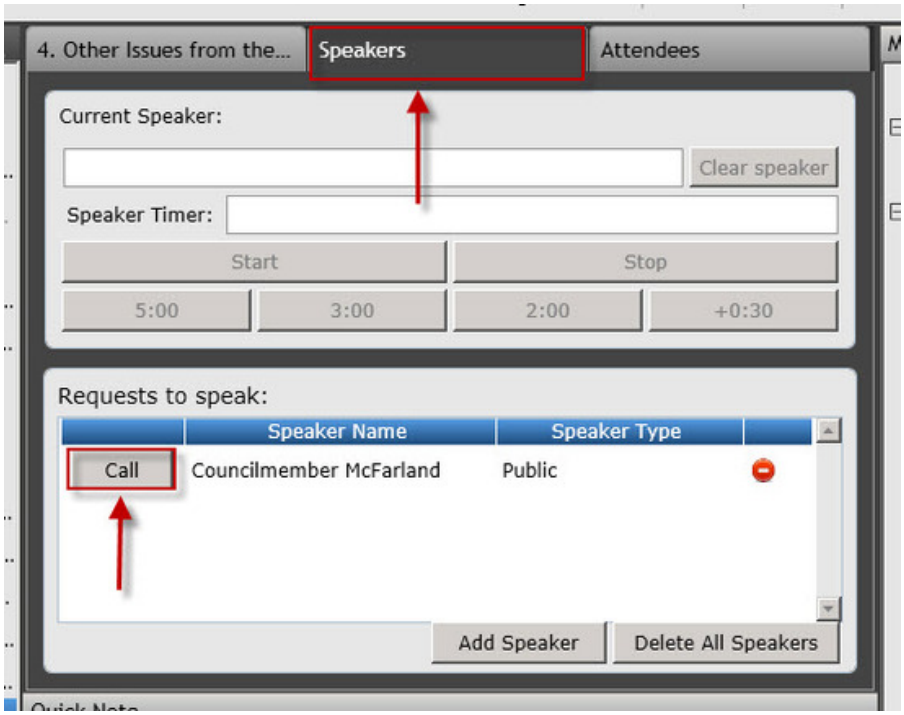
Calling a Speaker

When it is time to call a speaker, complete the following steps:

1. Select the **agenda item** to which the speaker was assigned (see Adding Speakers for more information about how to assign a speaker).
2. Click the **Speakers** tab.
3. Click **Call** next to the speaker's name.



The Speakers Tab

4. Designate an amount of time for the speaker. You can add additional time to the speaker timer by clicking **+0:30**.
5. Click **Start**. The speaker timer begins.
6. Click **Stop** when the speaker is finished speaking.
7. Click **Clear Speaker** to remove all speaker information.

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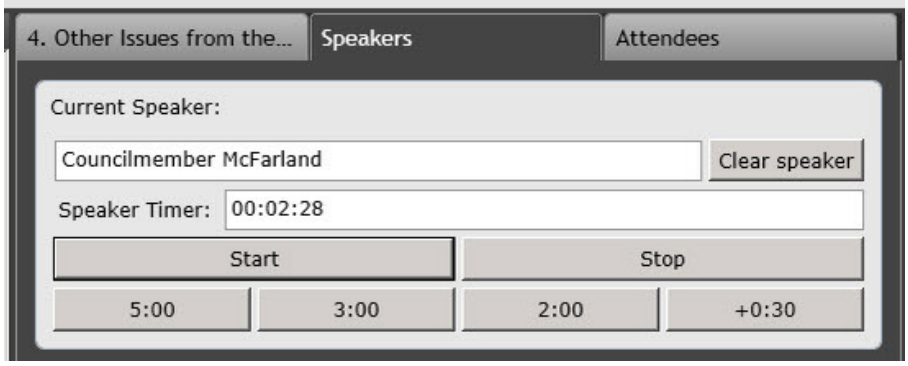

The Speaker Timer

Note: The speaker timer will flash yellow when there are 30 seconds remaining, and red when there are 5 seconds remaining.

Note: The Quick Note field can be customized to auto-generate text when a speaker is called.

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Recording Notes

After selecting the agenda item on which you'd like to leave a note, complete the following steps:

1. Click in the **Quick Note** field, or click **Note**, or press **Ctrl + N**.
2. Enter the text of the note in the Note, Editor Note, or Quick Note field. Editor Notes are for internal viewing only, and will never be visible outside your organization.
3. Click **Record** or press **Tab + Enter**.

You can select previously recorded notes to edit them.

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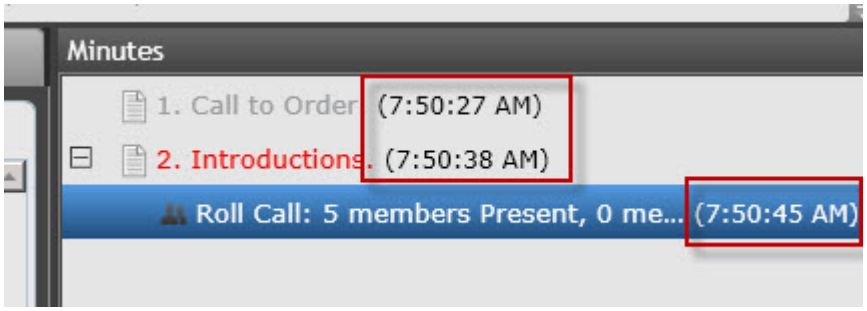
Timestamping an Agenda Item

Select an agenda item from the left **Agenda** panel, and either double-click the item or click **Record** in the middle of the screen. The item is timestamped in the **Minutes** panel.

Note: Timestamping an item twice will create a second instance of that item. The second timestamp will not contain any child items.

1. Select an **item** from the agenda.
2. Double-click the **agenda item**, or click **Record**, to record the item in the Minutes pane.



Timestamped Agenda Items in the Minutes Pane

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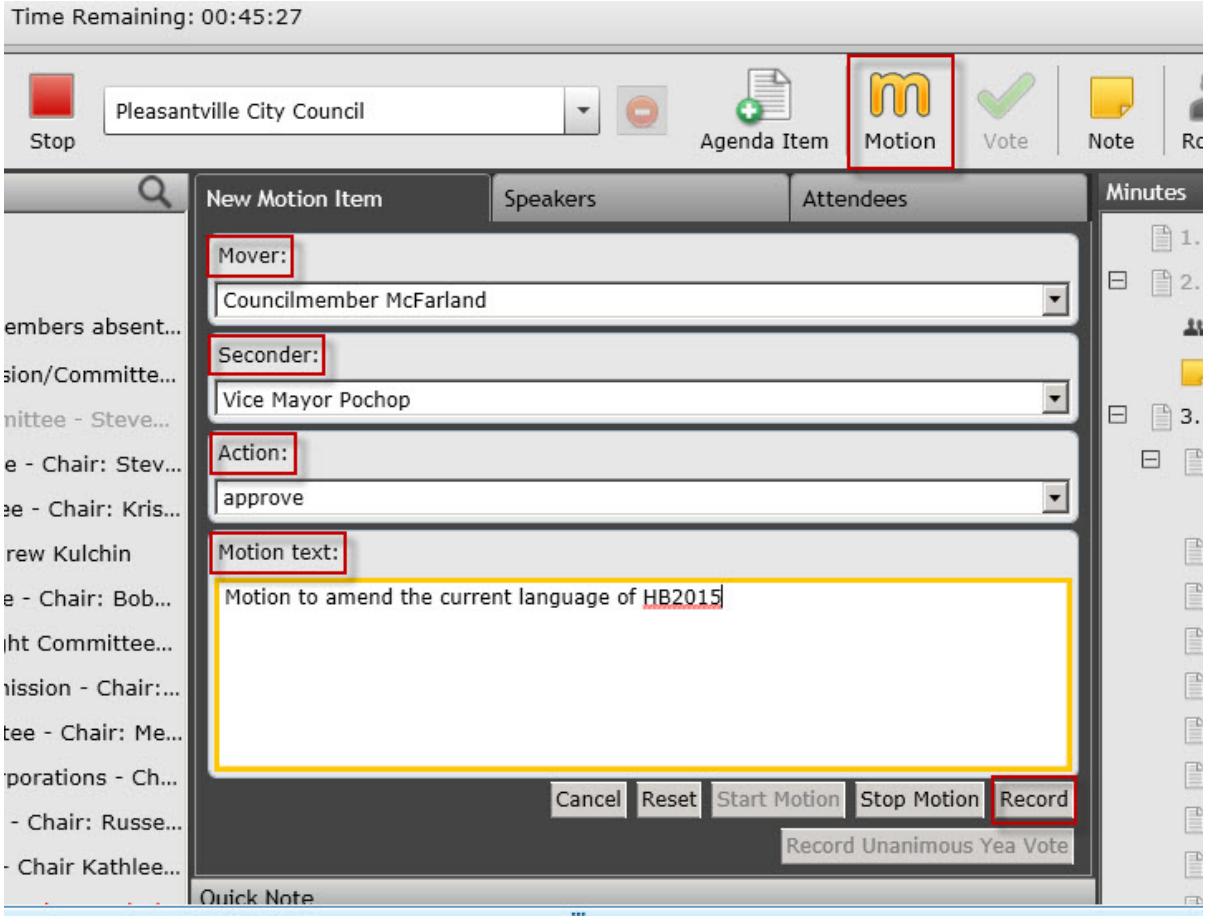
Creating a Motion

Motions are only supported for Meeting Efficiency clients. If you'd like a more information or a demo, please contact your Account Manager.

If you have the combined Motion/Vote Workflow enabled, the process you use will be different. See Combining the Motion and Vote Workflows for more details.

1. Timestamp the agenda item on which you'd like to record a motion. You can do this by double-clicking the item.
2. Click **Motion** or press **Ctrl + M**.
3. Select the **Mover**, **Seconder**, and **Action** from the drop-down menus available.
4. Enter the **Motion Text**.
5. Click **Record** or press **Ctrl + S**. This saves the motion to the minutes and automatically opens the voting screen.



Creating a Motion

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Tip for success! Click **Record Unanimous Yea Vote** to instantly record both the motion and yea vote.

Tip for success! Click **Start Motion** to start the motion in VoteCast.

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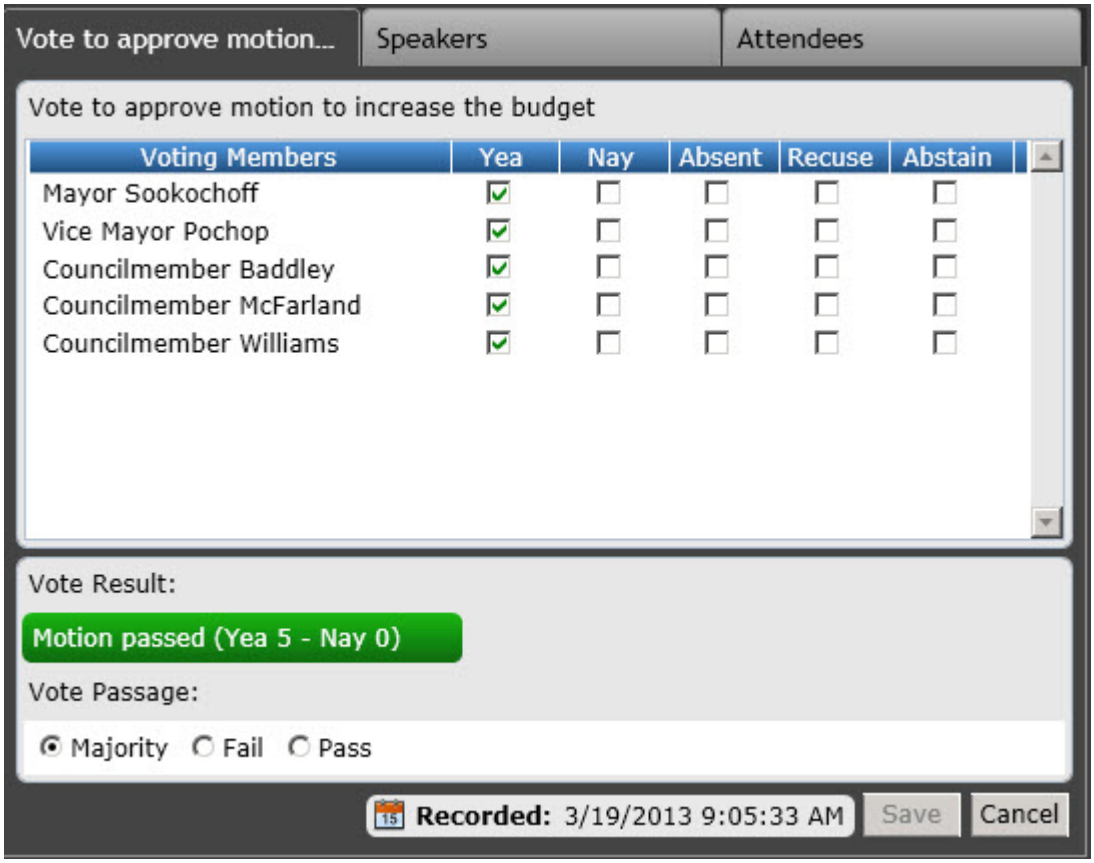
Taking a Vote

The Vote feature is only supported for Meeting Efficiency clients.

Generally, the Voting menu will open automatically after you record a motion. If it is not configured for this, click **Vote** or press **Ctrl + Y** to start the vote.

1. Select the appropriate voting result checkbox for each member (e.g., Yea, Nay, Recuse, Abstain, etc.).
2. Select the appropriate **Vote Passage** option (e.g., Majority, Fail, Pass). If the vote passed, the Vote Result will appear green. If it failed, it will appear red.
3. Click **Record** or press **Ctrl + S** to save the results of the vote.



Passing Vote

Tip for success! Click **Reset** to clear the Voting menu.

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Combining the Motion and Vote Workflows

Combining the Motion and Vote workflows allows you to record motions and their respective votes at the same time and on the same screen. You can enable this option in LiveManager configuration, or choose to use the old, separate motion and vote workflows.

Note: Combining the Motion and Vote workflows is not compatible with VoteCast.

1. Select the agenda item.
2. Click **Motion**.
3. Click in the **Move column** to select the mover.
4. Click in the **Second column** to select the seconder.
5. Click in the appropriate columns to record votes for each voting member shown.
6. Enter the **Motion Text**.
7. Click **Record** to record the motion and the vote or click **Record Motion Only** to record the motion but not the vote. The Record Motion Only button allows you to record multiple motions before you record the vote.
8. Confirm the vote result. It will be green if the vote passed, and red if the vote failed.

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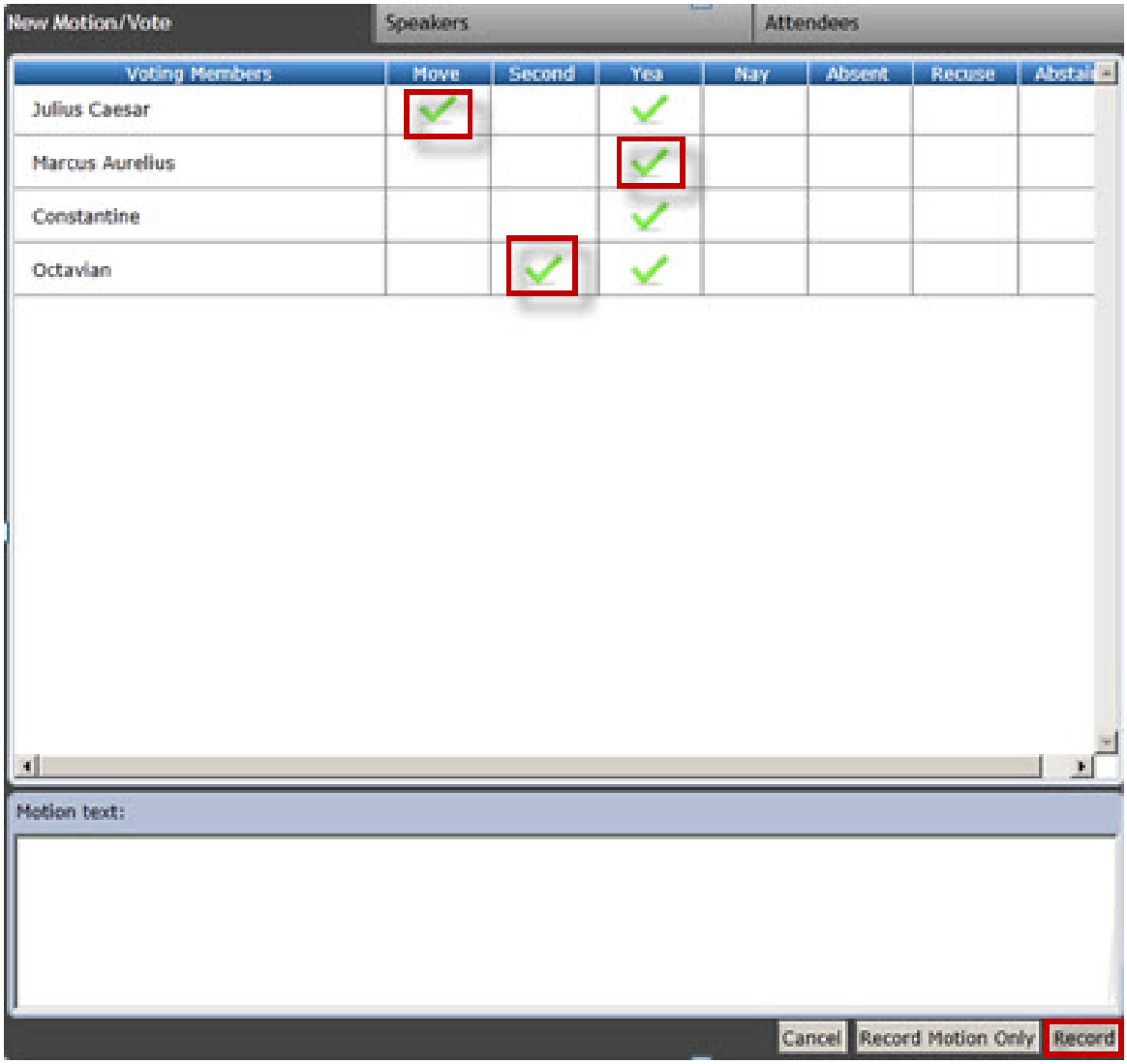

The Combined Motion-Vote Workflow

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Finalizing a Meeting

When you stop your meeting, the Minutes may automatically upload to MediaManager depending on your LiveManager profile. Please see your LiveManager Configuration Guide for instructions on changing this setting. If they do not automatically upload, complete the following steps:

1. Click **Upload**. A dialog opens and asks if you're sure you'd like to finalize the meeting and upload it to MediaManager.
2. Click **Finalize**. The meeting data will be available in MediaManager after it finishes uploading.

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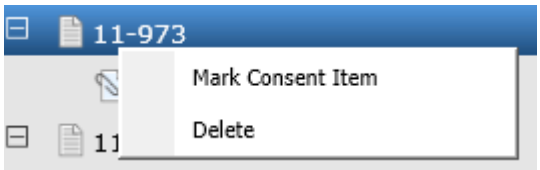
Working with Consent Agenda Items

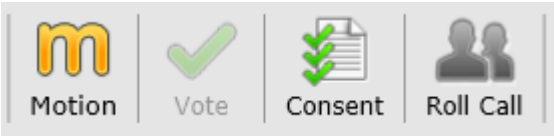
Consent items on the agenda are indicated by a grey "C" icon in the **Agenda** panel.

Right-click an agenda item and select **Mark Consent Item** to mark it as part of the Consent Agenda:



You can also unmark an item to "pull" it from the Consent Agenda.

The **Consent** button becomes enabled when Consent Agenda items are present and at least one of these agenda items has been timestamped.



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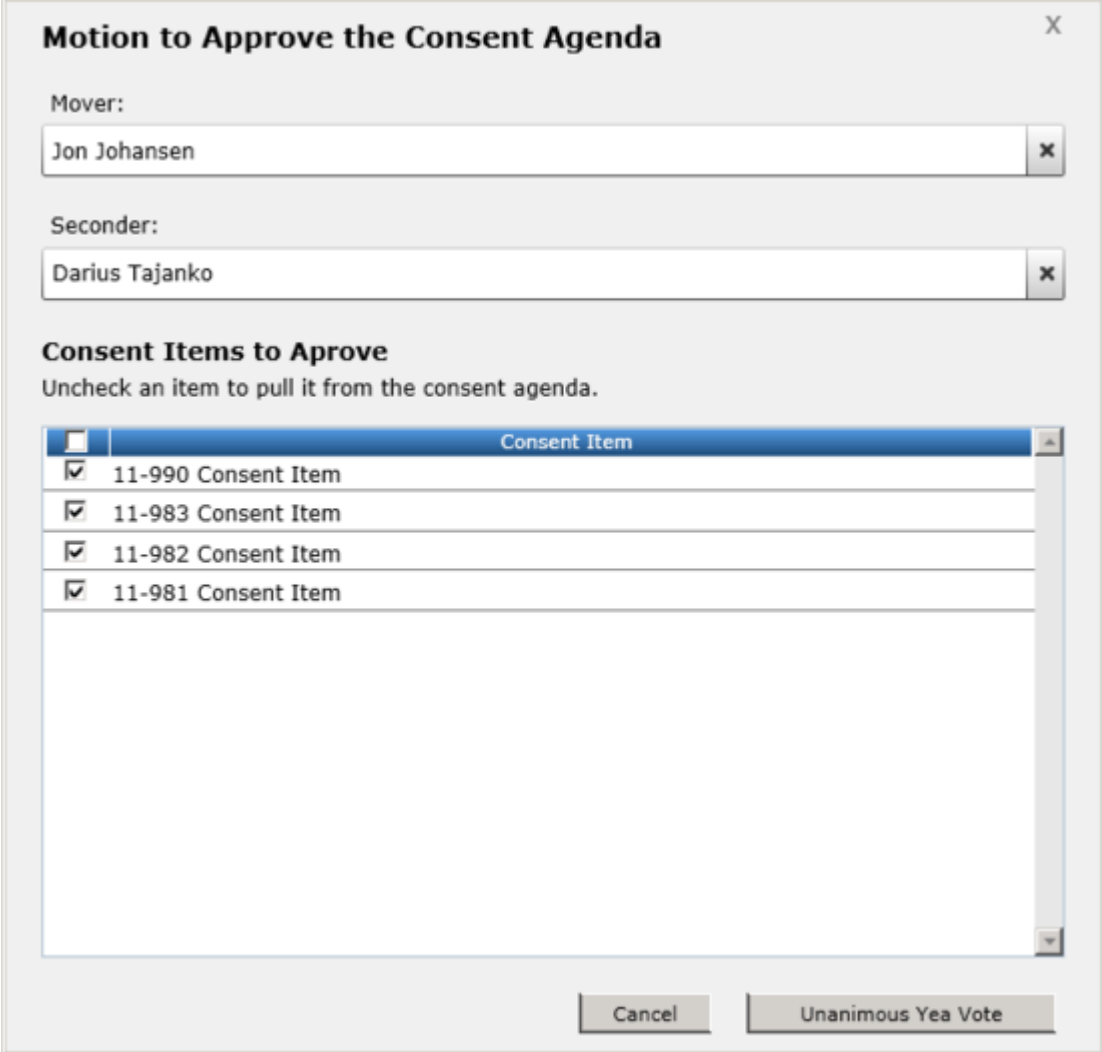
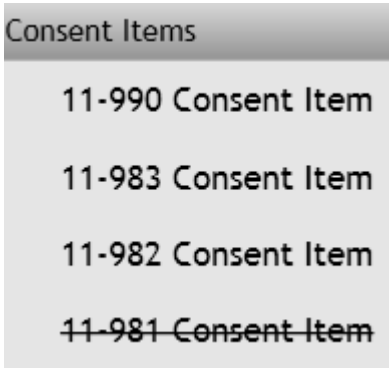
Clicking the **Consent** button opens the Consent Vote modal in LiveManager:



Note for VoteCast users: Clicking Consent also brings up the Consent Vote interface:

When you deselect a checkbox associated with an item to "pull" it from the Consent Agenda, the item receives a strikethrough treatment in VoteCast.



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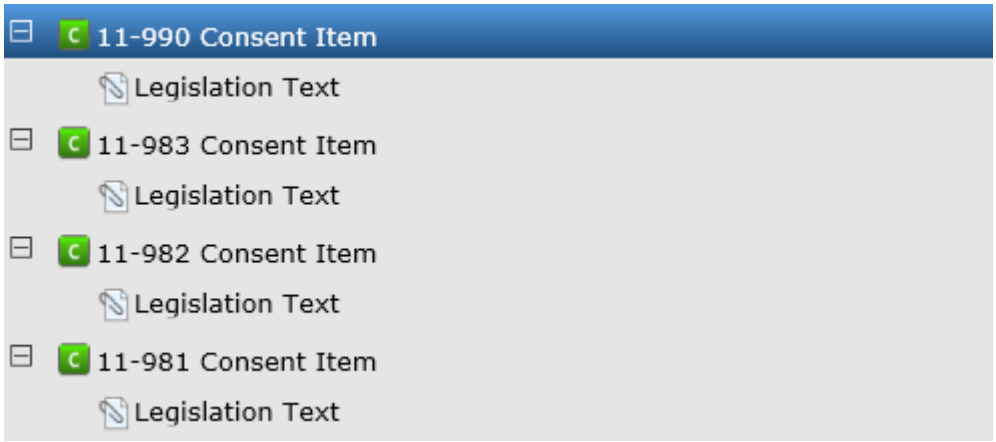
After you record the Consent Vote, a combined motion/vote item is recorded into the minutes. A green "C" icon indicates agenda items that were passed with this motion and vote.



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Setup Menu Features

The setup menu allows you to change some configuration options without opening the Configuration application. This section contains the following topics:

Changing Configuration Profiles

Changing Meeting Servers

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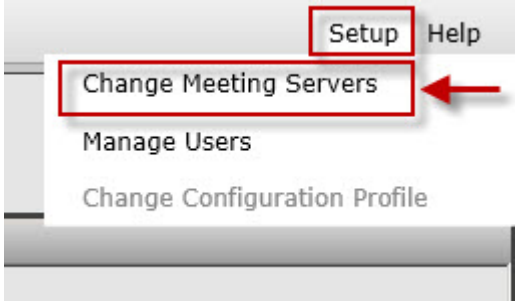
Changing Meeting Servers

You may need to access a different Meeting Server to see all your meetings. To change Meeting Servers, complete the following steps:

1. Click **Setup** and select **Change Meeting Server** from the menu available.



Change Meeting Servers

2. Click **Close LiveManager** to be returned to the Select a Meeting Server screen. LiveManager must close to change Meeting Servers.
3. Select the new Meeting Server and click **Open LiveManager**.

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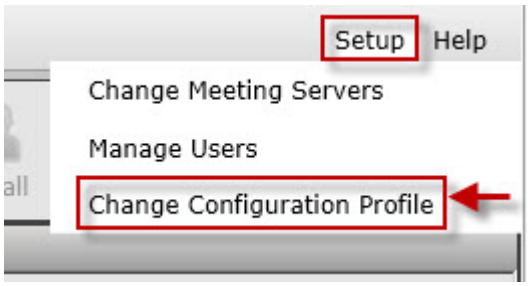
Changing Configuration Profile

The Change Configuration Profile option in the Setup menu changes the configuration profile used during the meeting. In order to assign a configuration profile, a meeting must be loaded. After a profile is set to an event, LiveManager will remember it for future meetings using the same event.

1. Click **Setup** and select **Change Configuration Profile** from the menu available.



Change Configuration Profile

2. Select the profile you wish to use.

3. Click **OK**.

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