

Administrative Clerks

Legislate for Webex administration allows for seamless and hassle-free platform customization and session scheduling. You can create and replicate agendas, link to external documentation, pull user information and avatars from Webex, and develop customizable permissions, roles, and groups. The Administrative Clerks can add the organization's specific design details to give attendees the full legislative experience right from their own homes.

The Administrative Clerks

As the Administrative Clerk, you have the task of managing the overall Legislate for Webex platform for your organization. There can be more than one Administrative Clerk to handle these tasks. You can customize the platform to reflect your organization's branding and terminology. This is completed as part of the initial setup.

You can also create various roles for users within the platform, for example creating lobby attendants and regular session attendees. It is within your capabilities to assign permissions and descriptions to these roles. You can drill down further by creating groups for attendees to be part of, along with their logo and attributes.

In your day to day role as the Administrative Clerk, you also have the authority to build the agenda and schedule a session, just as you would in the chamber. Administrative Clerks should have security-awareness training, excellent IT skills, optional HTML skills, Webex, and Legislate for Webex knowledge to fulfill the role requirements.

The Role of the Administrative Clerks

As an Administrative Clerk, you have three key roles:

1. When you're setting up the platform, you can customize and configure the Webex Legislature functions and create roles & groups based on your organization's formation.
2. During the daily running of the sessions, you can add extra attributes to user profiles.
3. You can generate and schedule agendas and sessions.

Login

The Administrative Clerks will be given a URL to login to the Legislate for Webex platform where they will use their regular Webex details to gain access.

You can gain access to the admin section at any time you wish.

You can access the administrative session from a session by selecting your avatar in the top right hand corner, then select 'Admin page' from the drop-down.

Getting Started with Legislate for Webex

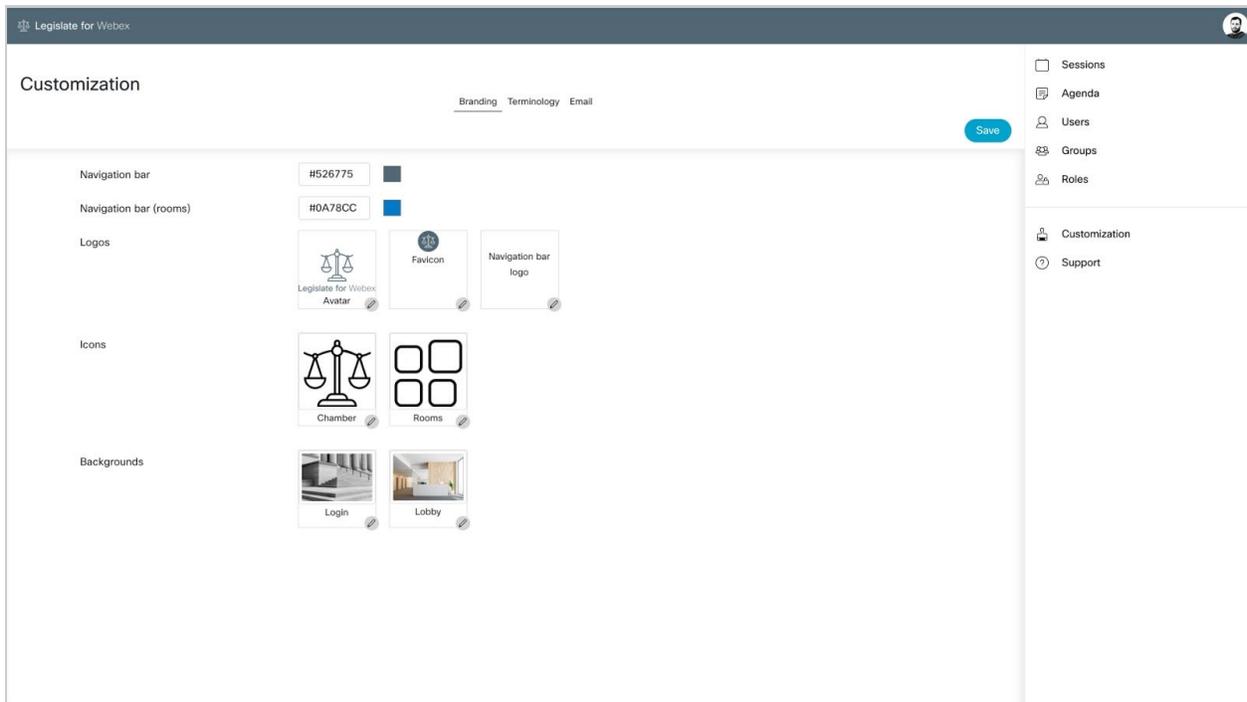
When you first begin to use Legislate for Webex, you should set up the platform to reflect your organization's branding and core characteristics, you can do this by customizing the layout and look of the application.

Customization & Configuration

In your admin dashboard, you can access the customization settings in the bottom right of your settings.

Carry out the following steps when you first log into your Legislate for Webex instance to ensure that the branding and terminology will be familiar and cohesive for all other users.

Branding

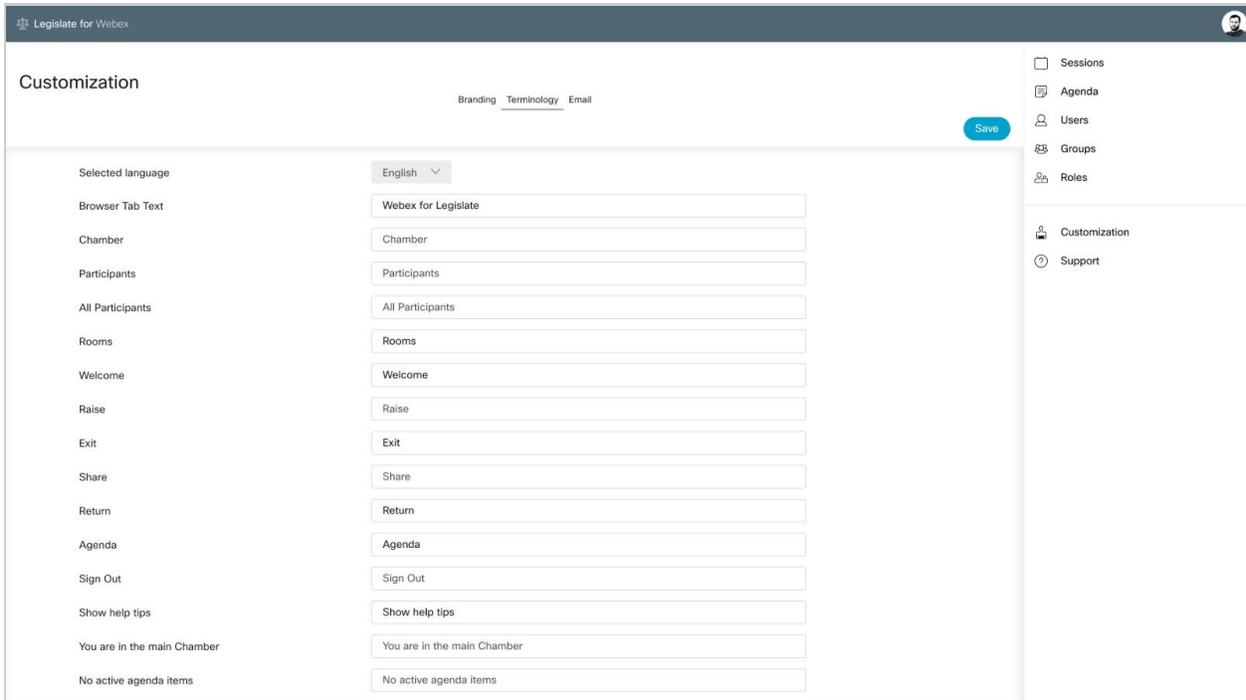


You can customize the application for all users here in the branding section. It is your responsibility to have the appropriate image files and branding color palettes to tailor the platform to your organization's needs.

- **Browser Tab Text:** This text will display outside of the app as the web browser text on the tab.
- **Navbar:** Choose the color code for your navbar (the navigation bar across the top of your screen where your avatar and "Show help tips" reside).

- Navbar (Huddle): Choose a huddle navbar color code (we'd recommend choosing a different color to the navbar so users can distinguish between their private huddle and the chamber).
- Logos: Add logos for the Avatar, favicon (or shortcut icon; the small icon that displays next to the text in the web application tab across the top of your screen), and Navbar logo.
- Icons: Add icons for the chamber and rooms.
- Backgrounds: Choose backgrounds for the login and lobby.

Terminology



The screenshot shows the 'Legislate for Webex' Customization interface. At the top, there are tabs for 'Branding', 'Terminology', and 'Email'. A 'Save' button is located on the right side of the main content area. The main content area is a table with two columns: a list of terms and their corresponding input fields. The terms and their values are as follows:

Term	Value
Selected language	English
Browser Tab Text	Webex for Legislate
Chamber	Chamber
Participants	Participants
All Participants	All Participants
Rooms	Rooms
Welcome	Welcome
Raise	Raise
Exit	Exit
Share	Share
Return	Return
Agenda	Agenda
Sign Out	Sign Out
Show help tips	Show help tips
You are in the main Chamber	You are in the main Chamber
No active agenda items	No active agenda items

On the right side, there is a sidebar with navigation options: Sessions, Agenda, Users, Groups, Roles, Customization, and Support. The 'Customization' option is currently selected.

In your day-to-day runnings of the chamber meetings and hearings, it's essential for you and your colleagues to feel comfortable working on Legislate for Webex. The ability to customize the terminology enables an experience similar to that of the physical workplace. It will help users recognize their surroundings within the application.

Enable users to feel comfortable by adding your organization's standard terms and phrases.

To do this, toggle to the terminology tab at the top of your page to give custom names to the areas of your Legislate for Webex application.

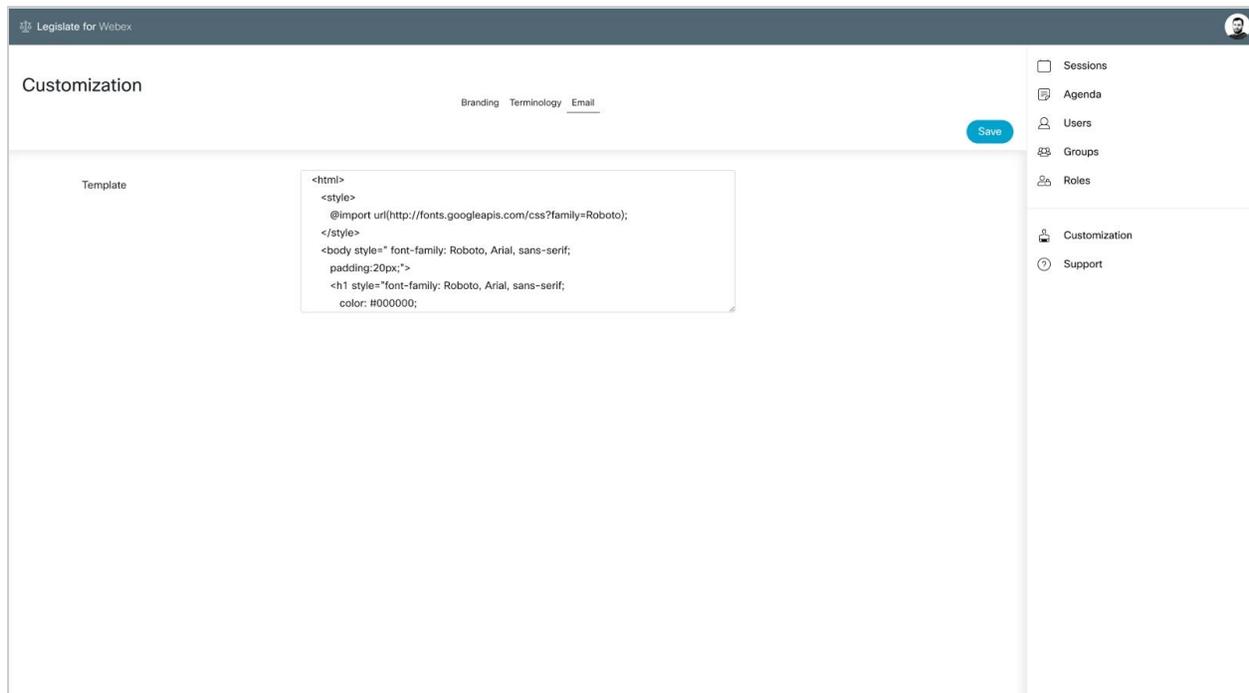
These names and terms will then appear throughout the application for all users to see.

- Main area: This is the chamber area of your application.
- Session Attendants: The list of people who attend the session.
- Side conversation room: The list of rooms users can attend during the session.
- Agenda: The agenda for the session.

Email

This is the primary email template to send invites out to participants. It defines the layout, style, and content of email invites. You can create custom emails to suit your needs and branding.

The email is fully customizable using HTML. There are no restrictions placed by Webex Legislature, so you can replicate your organization's existing email style and branding. By default, the email template matches the standard WebEx template.



To update the template, copy and paste your template into the text box and then select the blue SAVE button.

You have the choice to ask a web developer to create the HTML email code if needs be.

If you would like to develop the email template yourself, you will need to follow these steps:

- You will need a code editor to create and edit the template.
- To test this in a browser, please save the HTML file, then right-click and open in the browser. You can then check the appearance of the email.
- Copy and paste the code into the email text field in Legislate for Webex.
- When you are happy with all of your customization preferences, please click the blue Save button.
- Send yourself a test email by setting up a test session and invite just yourself to ensure the email link works. Check your test email to verify it has the correct styling, brand, logo, and layout and that all URL links and session time details are as expected.

Structure your Organization with Legislate for Webex

The following steps can be altered and updated on a day-to-day basis or as you see fit.

Roles

To develop your workflows and processes, they need to revolve around how each user works on the platform. We have created pre-packaged roles that give you the foundations for creating users with various characteristics and permissions.

A role is made up of a set of permissions of what a user can do and see. Think of it as turning on and off features for a particular group of users.

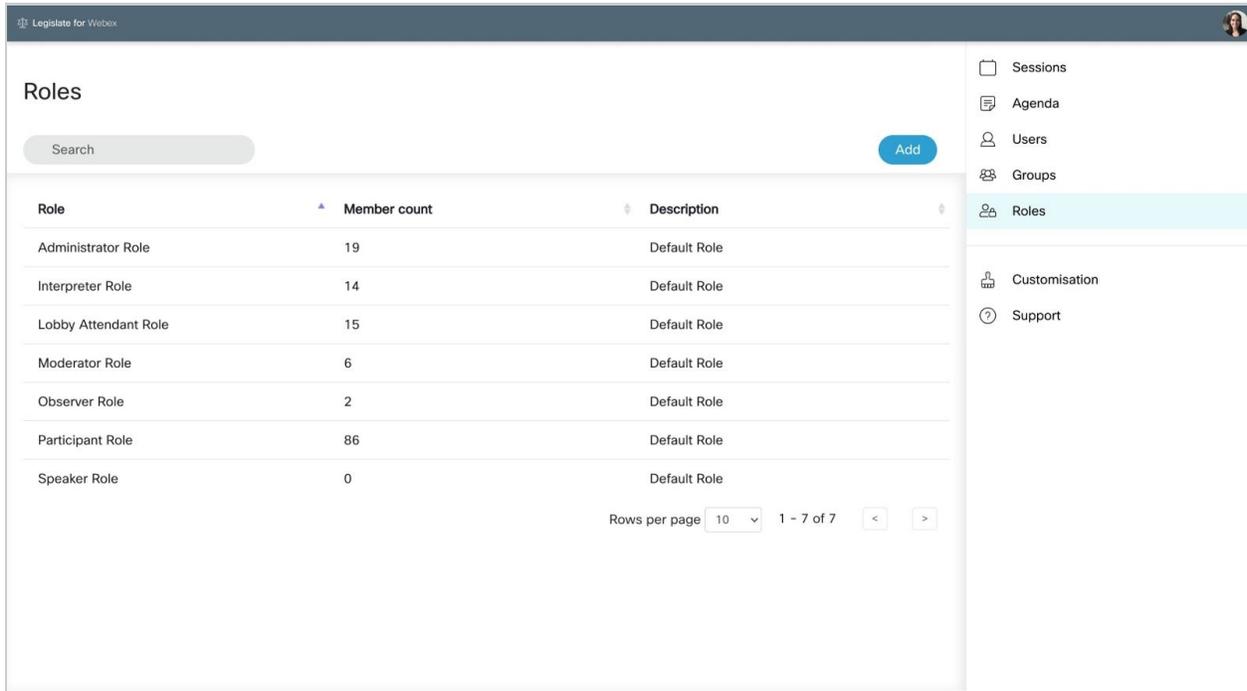
For example, the moderator can carry out all the legislator's tasks, but the moderator has extra permissions to create votes, schedule sessions, and create new agenda items.

There are multiple benefits to assigning roles to users within Legislate for Webex:

- A. This feature allows Administrative Clerks to set up a role once and then quickly apply it to many users, rather than repeatedly set the same permissions to any user that joins the application.
- B. There is less risk of administrative error when applying the same set of permissions to many users. It helps ensure consistency.
- C. If a role needs to be updated, it can be done quickly and apply to all members assigned to that role. Updates include changing the name of the role or making role permission changes.

As the administrative clerk, you can create Roles for different users. Legislate for Webex provides out of the box, typical roles which you can adapt to suit your organization. You can also create new roles from scratch:

- Select Roles on the right navbar and click the blue Add button.



Roles

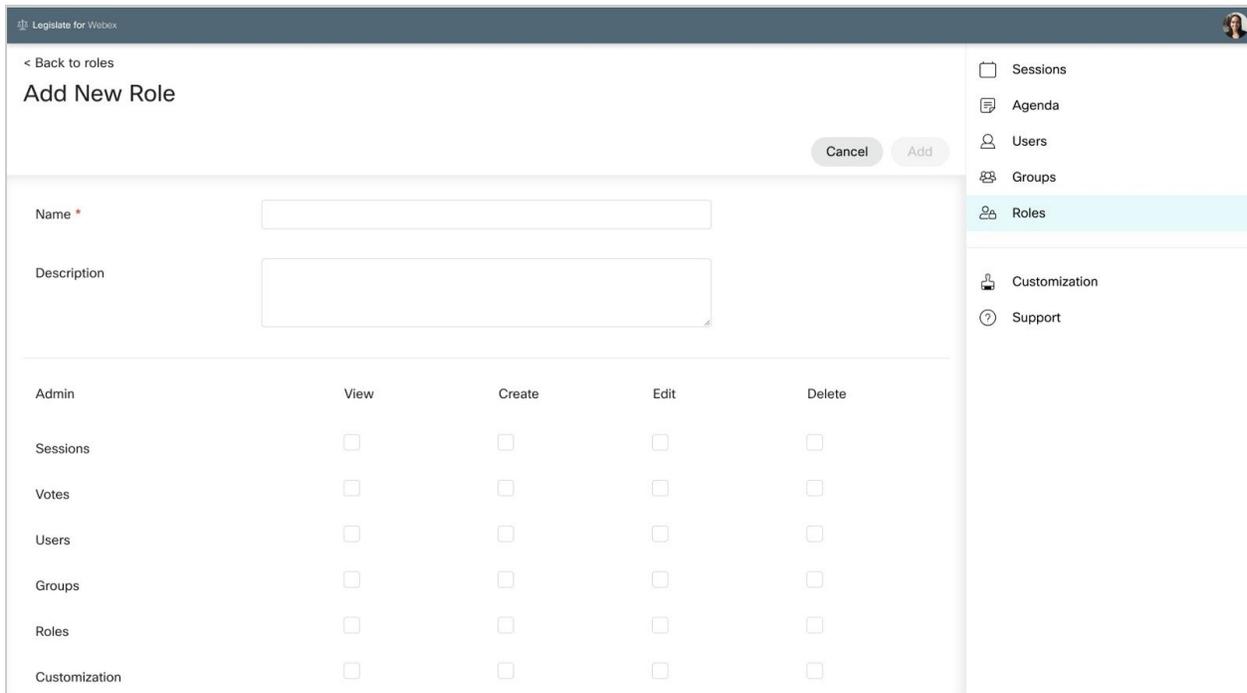
Search Add

Role	Member count	Description
Administrator Role	19	Default Role
Interpreter Role	14	Default Role
Lobby Attendant Role	15	Default Role
Moderator Role	6	Default Role
Observer Role	2	Default Role
Participant Role	86	Default Role
Speaker Role	0	Default Role

Rows per page: 10 | 1 - 7 of 7

- Sessions
- Agenda
- Users
- Groups
- Roles**
- Customisation
- Support

- You must give your role a name and an optional description.
- You can then select the permissions for this particular role.
- You can also provide them with further detailed permissions.



Whereas roles are what someone can do, groups are their affiliation. This could be political parties, session facilitation staff, or just participating as a guest.

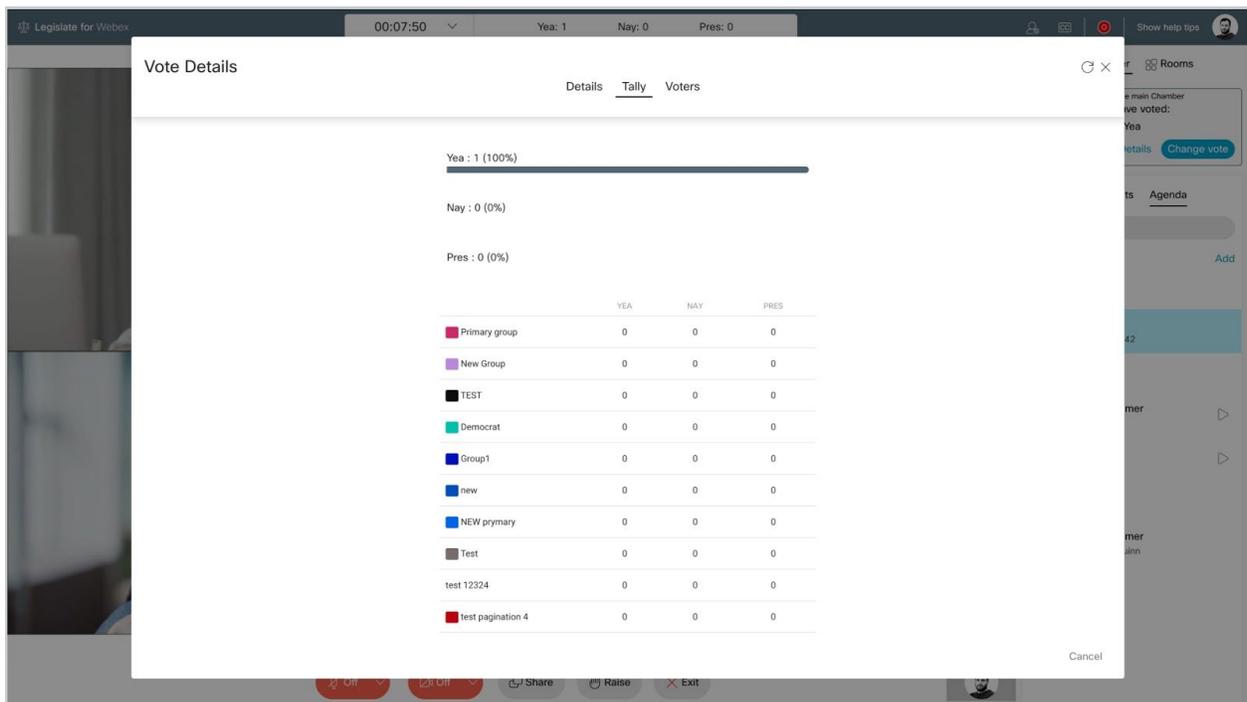
The main reason for groups is to build up an organizational structure. You can assign groups to users so they inherit all the group's attributes, such as the group colors and logos.

Groups

The groups can represent the various parties involved in the chamber, or any other category such as hosts or moderators, that people align with.

Groups enable tally visualizations during a voting session (the tally visualization uses group configurations to communicate a group or party's preference breakdown). You have the option to disable a group if you would not like to have it taken into account in the tally.

In this example, there are two groups that represent party affiliations. They are set as primary groups, meaning they will appear in the voting tally.



00:07:50 Yea: 1 Nay: 0 Pres: 0

Vote Details

Details Tally Voters

Yea : 1 (100%)

Nay : 0 (0%)

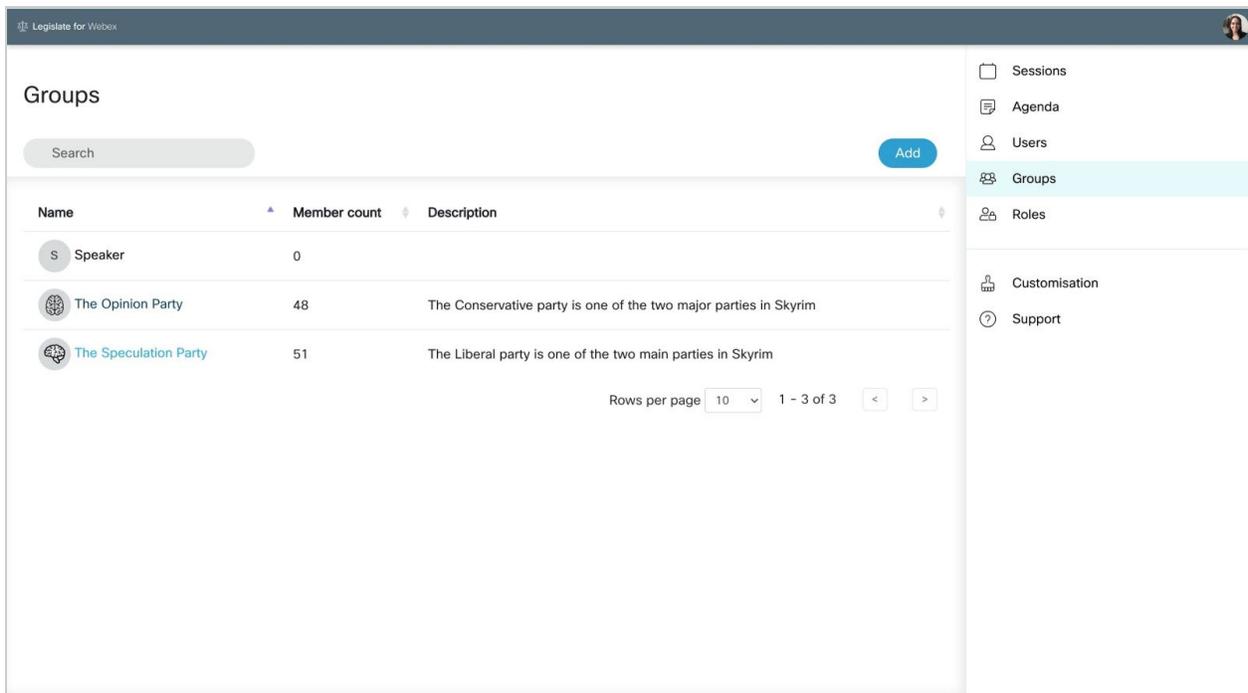
Pres : 0 (0%)

	YEA	NAY	PRES
Primary group	0	0	0
New Group	0	0	0
TEST	0	0	0
Democrat	0	0	0
Group1	0	0	0
new	0	0	0
NEW primary	0	0	0
Test	0	0	0
test 12324	0	0	0
test pagination 4	0	0	0

Cancel

The above image drills down into the vote; see the two groups that represent party affiliations. The groups are differentiated by their colors, making it easy for legislators to see the vote breakdown contrasts.

To create a new group,



Name	Member count	Description
Speaker	0	
The Opinion Party	48	The Conservative party is one of the two major parties in Skyrim
The Speculation Party	51	The Liberal party is one of the two main parties in Skyrim

To create a new group:

- Select the blue Add button.
- Give the group a name and an optional description.
 - Primary group types enable users to be distinguished by their Party association. You can see the person's primary association, or their Party, beside the person's name in the participant list and in the vote tally breakdowns.
 - Secondary group types allow for additional breakdowns within groups. For example, you might need to group people by their State, Subcommittee, or

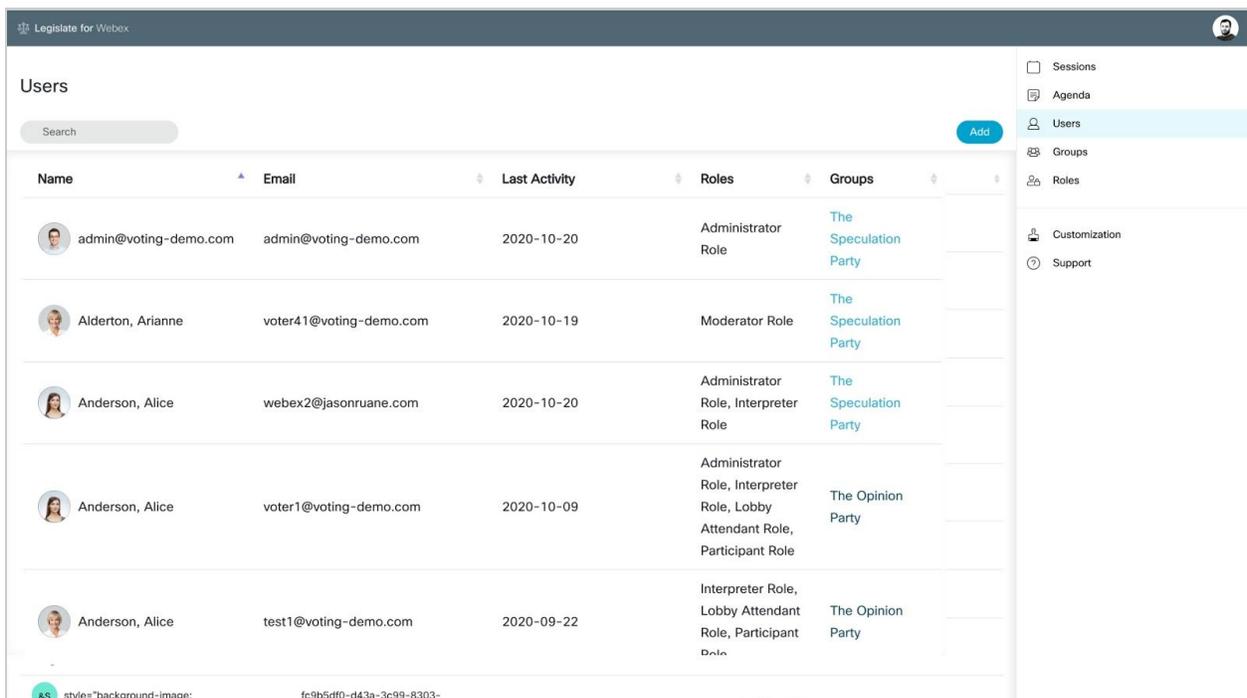
job-function. You will see this grouping beside the users' names in the participant list. A secondary group could be "Oregon." One person may have a primary group called "Democrat" with a secondary grouping "Oregon," and another person who has a primary group "Republican" who can also have a secondary group "Oregon."

- Miscellaneous groupings are for administrative purposes and will not be visible to participants. For example, a group called "Support group 3" is set up, whereby the site support people may split up all users into groups for apportioning support queries.
- Select the blue Save button when you want to create the group.

Users

To see a list of all the users, click on Users on the right-hand side menu.

You will then see a table of all users with a row containing the details such as Email and Roles across the top.

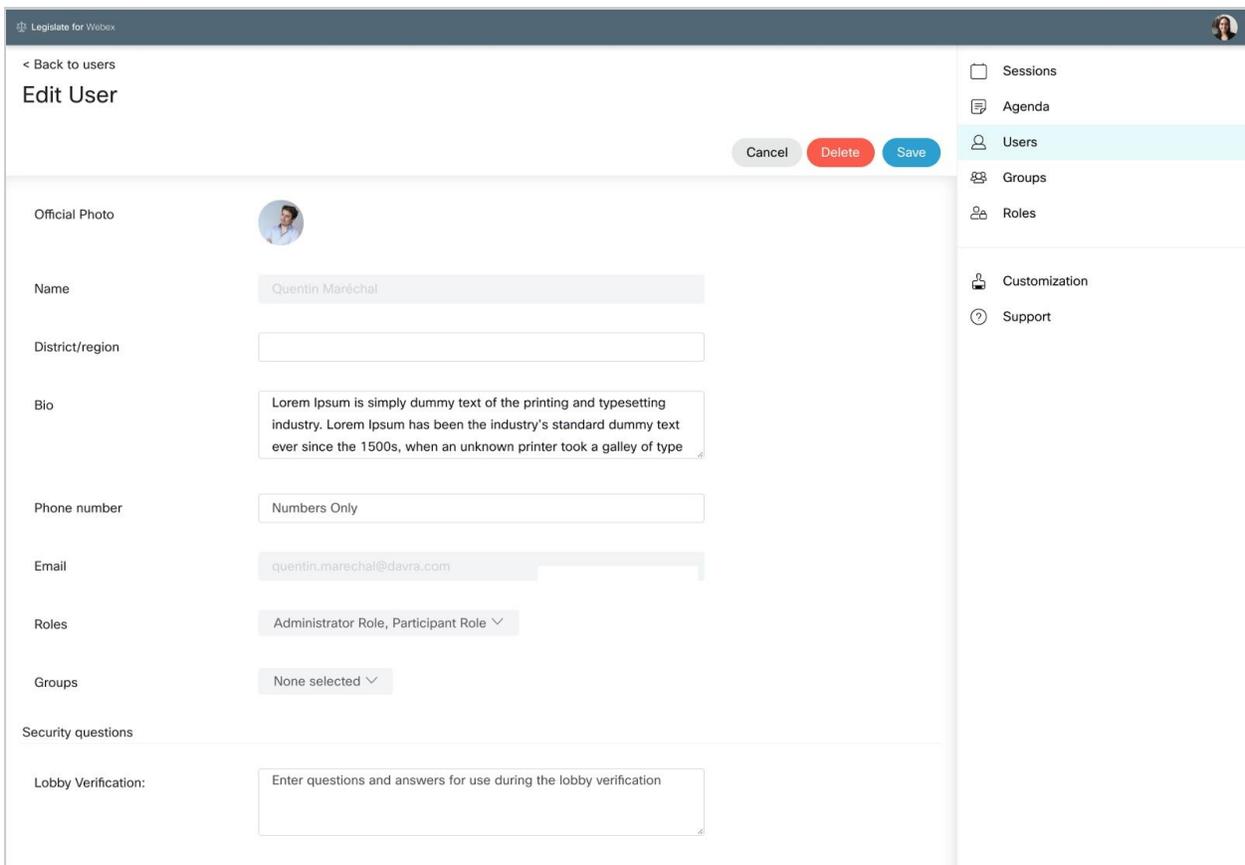


Name	Email	Last Activity	Roles	Groups
 admin@voting-demo.com	admin@voting-demo.com	2020-10-20	Administrator Role	The Speculation Party
 Alderton, Arianne	voter41@voting-demo.com	2020-10-19	Moderator Role	The Speculation Party
 Anderson, Alice	webex2@jasonruane.com	2020-10-20	Administrator Role, Interpreter Role	The Speculation Party
 Anderson, Alice	voter1@voting-demo.com	2020-10-09	Administrator Role, Interpreter Role, Lobby Attendant Role, Participant Role	The Opinion Party
 Anderson, Alice	test1@voting-demo.com	2020-09-22	Interpreter Role, Lobby Attendant Role, Participant Role	The Opinion Party

These User profiles are taken from the participants' Webex Accounts. The participant's avatar, name, and email address are inherited.

Administrative Clerks can add extra attributes, such as:

- An official photo (this is different from the avatar; the lobby attendant will use the official photo when letting attendants into the chamber);
- Region;
- Bio; the name, region, and bio information will then be displayed in the application for all participants to see to get to know each other;
- Phone number;
- Group: Here, you can assign the user to their a group;
- Roles: This is permission-based. The user can be a participant or voter, and with those roles comes a list of permissions they are granted access to;
- Security questions: Both the questions and answers are editable and will be used by the lobby attendant in the screening.



Legislate for Webex

< Back to users

Edit User

Cancel Delete Save

Official Photo 

Name

District/region

Bio

Phone number

Email

Roles

Groups

Security questions

Lobby Verification:

Sessions

Agenda

Users

Groups

Roles

Customization

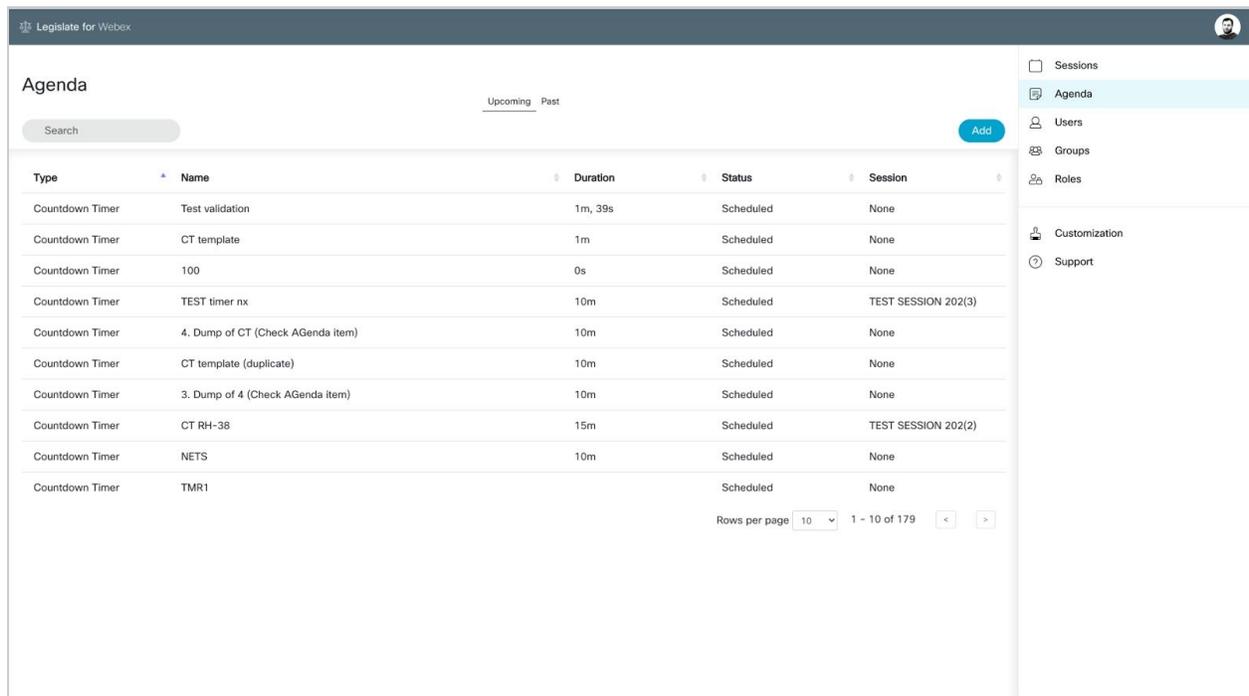
Support

Create Upcoming Sessions with Legislate for Webex

Once you have the previous set up steps complete, you are ready to create your first session. The following steps can be done regularly to create sessions, agendas, and voting polls.

Build Agenda

The Administrative Clerks can build out the agenda. To do this, select “Agenda” in the right sidebar of your screen.



The screenshot displays the 'Agenda' management interface. At the top, there is a search bar and an 'Add' button. Below is a table listing various agenda items, all of which are 'Countdown Timer' type and have a status of 'Scheduled'. The items include test validation, CT templates, and specific session-related tasks. A right sidebar provides navigation for Sessions, Agenda, Users, Groups, Roles, Customization, and Support.

Type	Name	Duration	Status	Session
Countdown Timer	Test validation	1m, 39s	Scheduled	None
Countdown Timer	CT template	1m	Scheduled	None
Countdown Timer	100	0s	Scheduled	None
Countdown Timer	TEST timer nx	10m	Scheduled	TEST SESSION 202(3)
Countdown Timer	4. Dump of CT (Check AGenda item)	10m	Scheduled	None
Countdown Timer	CT template (duplicate)	10m	Scheduled	None
Countdown Timer	3. Dump of 4 (Check AGenda item)	10m	Scheduled	None
Countdown Timer	CT RH-38	15m	Scheduled	TEST SESSION 202(2)
Countdown Timer	NETS	10m	Scheduled	None
Countdown Timer	TMR1		Scheduled	None

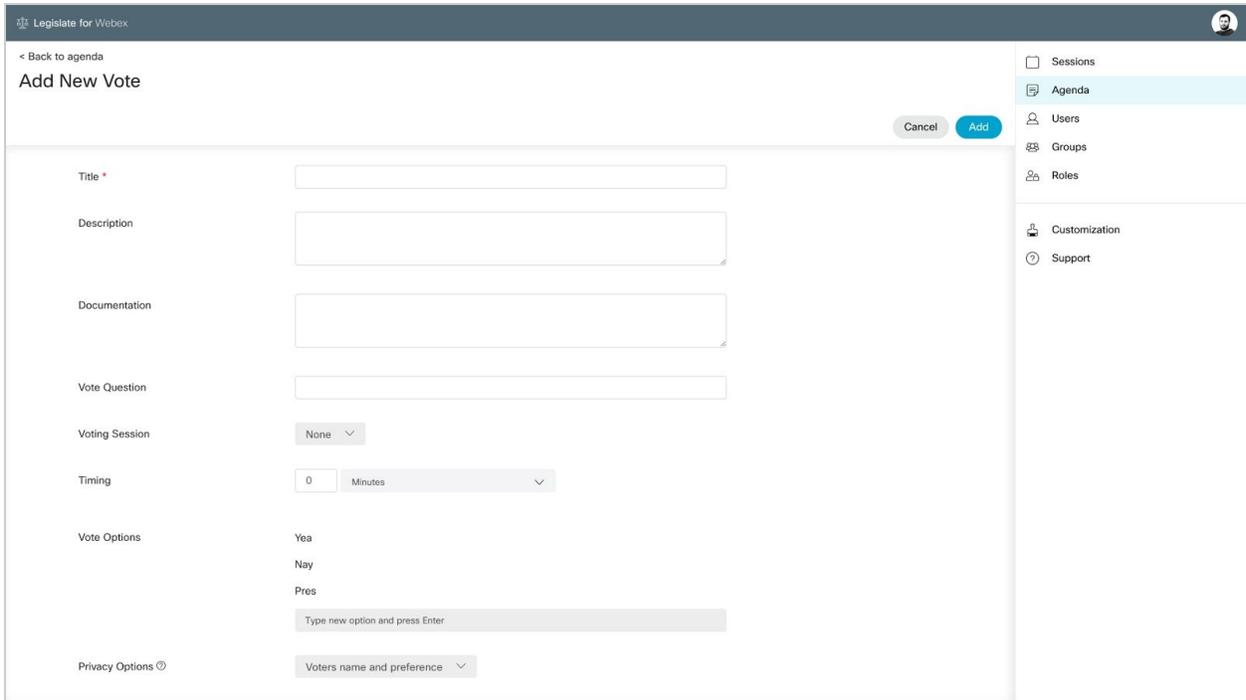
Rows per page: 10 | 1 - 10 of 179

You are presented with upcoming agenda items. You can toggle between “Upcoming” and “Past” items at the top of the table.

To create a new agenda item, select the blue “Add” button.

You have the choice of selecting either a “Vote” or “Timed Speech” item.

Vote / Poll



The screenshot shows the 'Add New Vote' form in the 'Legislate for Webex' application. The form is titled 'Add New Vote' and has a 'Cancel' button and an 'Add' button. The form fields are:

- Title *
- Description
- Documentation
- Vote Question
- Voting Session (None)
- Timing (0 Minutes)
- Vote Options (Yea, Nay, Pres, Type new option and press Enter)
- Privacy Options (Voters name and preference)

The sidebar on the right contains the following navigation links:

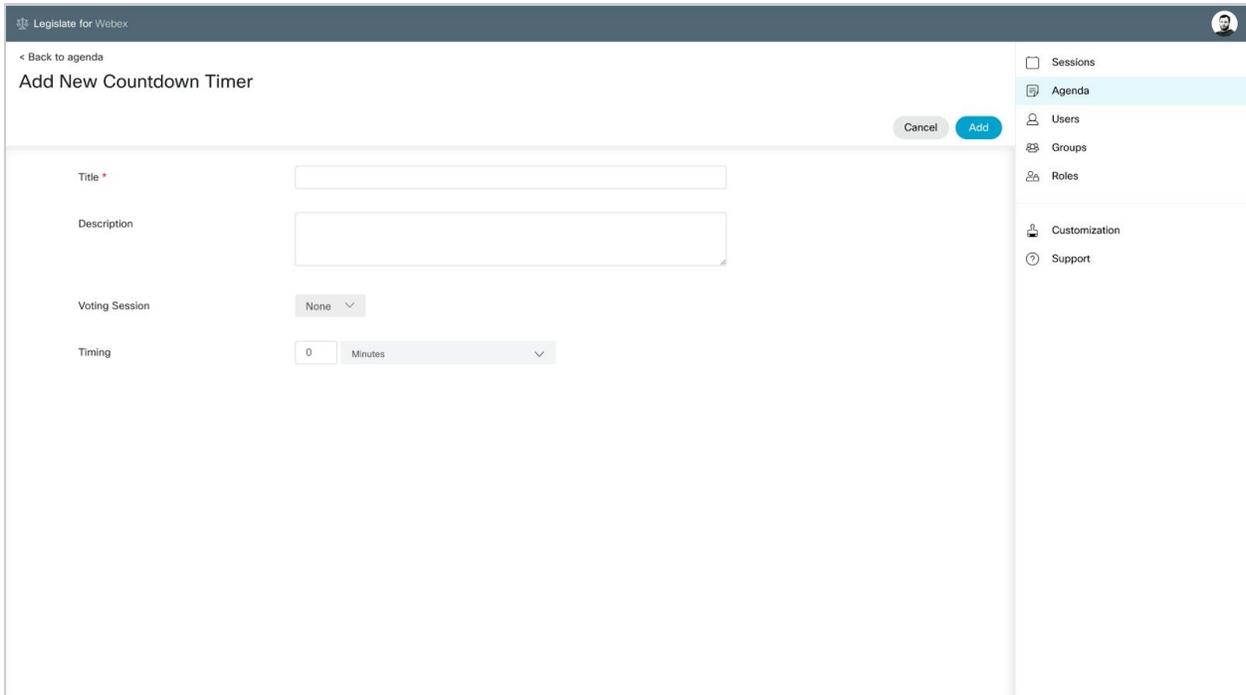
- Sessions
- Agenda
- Users
- Groups
- Roles
- Customization
- Support

- The title is the name given to the vote.
- The description is the description of the vote.
- The documentation section relates to any information needed for the legislators to read about the vote; for example, you can add external links or URLs to bills on government websites here.
- The vote question is what voters will answer.
- The timing allows you to select how long members have to vote from its initiation.

- Vote options will enable you to state the answers members can give.
- Voting session; used to assign an agenda item to a session.
- You have the opportunity to make this vote anonymous.

When you've filled out all the details, select the blue Add button. The agenda will then show in the Agenda list.

Timed Speech



The screenshot shows the 'Add New Countdown Timer' form in the 'Legislate for Webex' application. The form has the following fields:

- Title ***: A text input field.
- Description**: A text input field.
- Voting Session**: A dropdown menu with 'None' selected.
- Timing**: A numeric input field with '0' and a unit dropdown menu with 'Minutes' selected.

Navigation options in the sidebar include: Sessions, Agenda, Users, Groups, Roles, Customization, and Support.

This agenda item allows you to create either an open or timed speech.

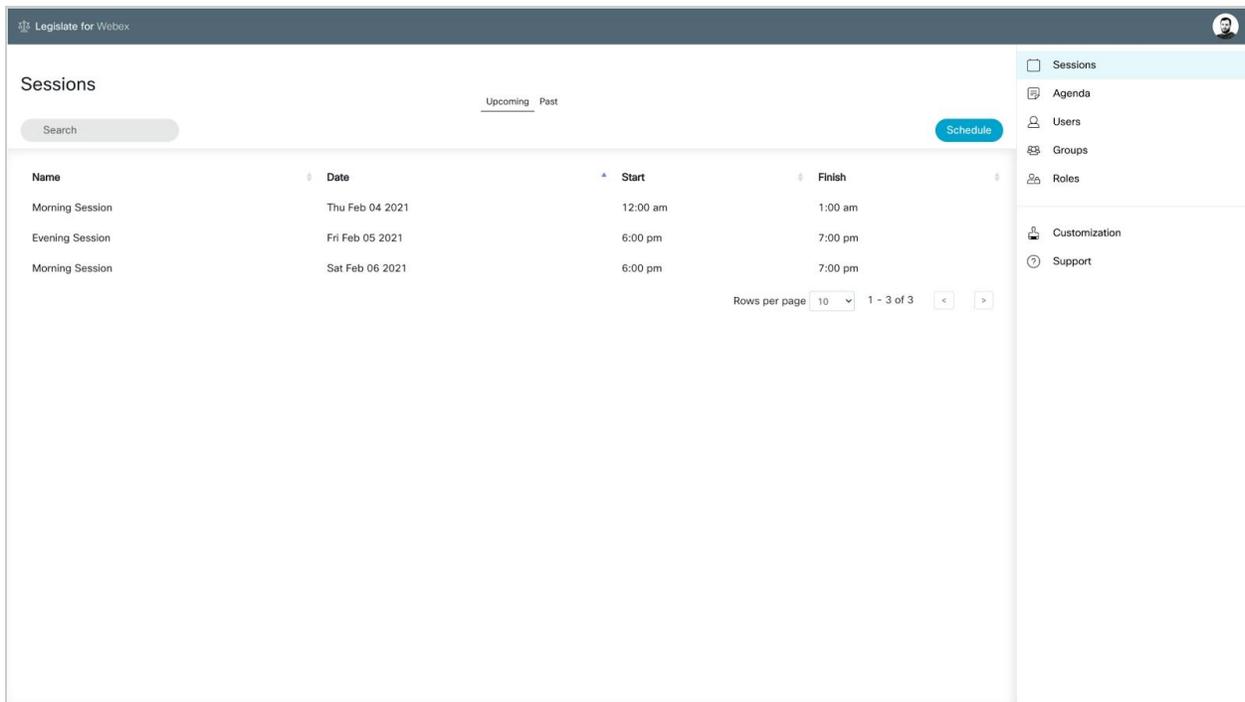
- The title is the name given to the speech.
- The description is the description of the speech.
- The timer allows you to choose whether you want an open-ended speech or timed speech; if you select timed, it will allow you to set the time in minutes.
- Voting session; used to assign the timed speech to a session.
- The upcoming agenda item will then be displayed under “Agenda” for all attendees to see in their foyer.

Schedule Session

To schedule a session, on your Admin homepage, select “Session” in the top right-hand corner.

Schedule the session at least 25 minutes before the actual start time to ensure all participants have time to get through the lobby (if you need the lobby feature for the session).

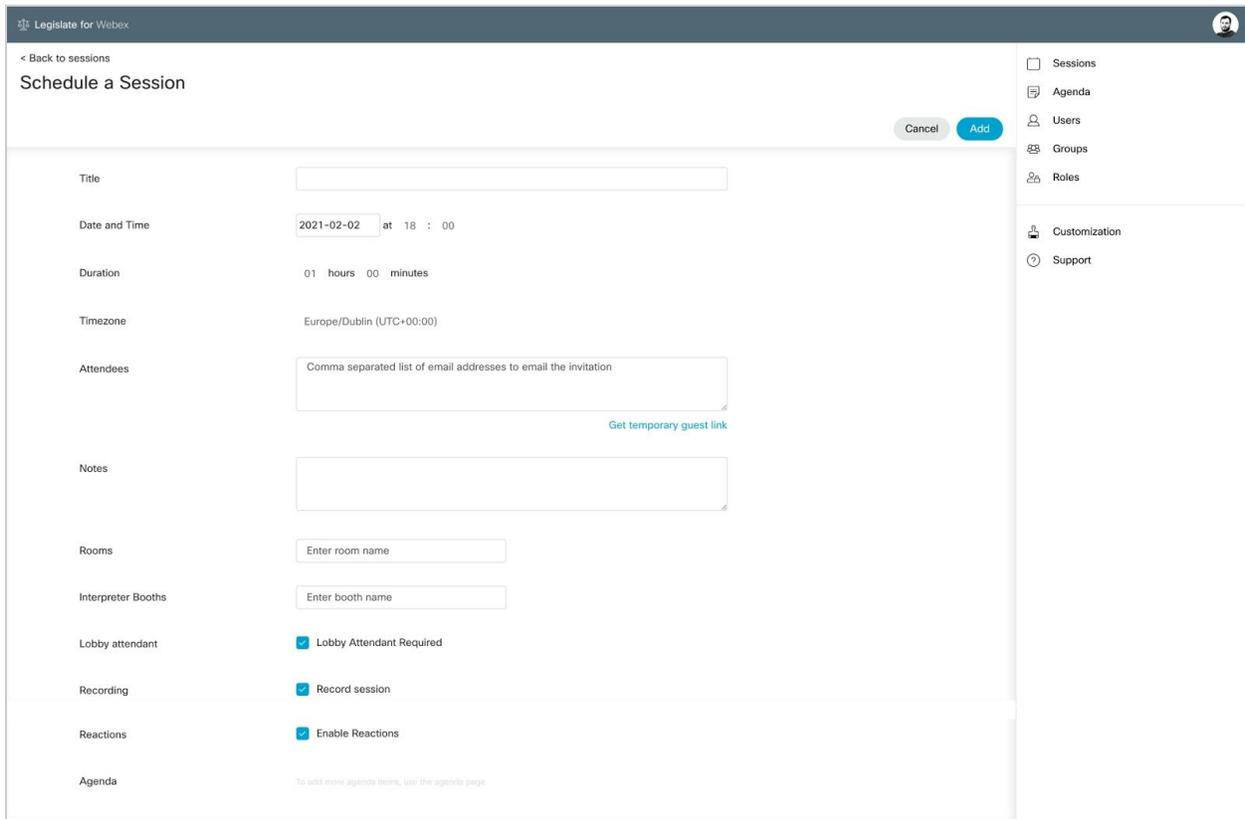
Add on an extra 35 minutes to the end of the actual session time if the session runs over.



Name	Date	Start	Finish
Morning Session	Thu Feb 04 2021	12:00 am	1:00 am
Evening Session	Fri Feb 05 2021	6:00 pm	7:00 pm
Morning Session	Sat Feb 06 2021	6:00 pm	7:00 pm

You will see your upcoming sessions in the table. You can toggle between upcoming sessions and past sessions and search through the sessions using the Search function.

To schedule a session, click the blue Schedule button.



Legislate for Webex

< Back to sessions

Schedule a Session

Cancel Add

Title

Date and Time at 18 : 00

Duration 01 hours 00 minutes

Timezone Europe/Dublin (UTC+00:00)

Attendees
[Get temporary guest link](#)

Notes

Rooms

Interpreter Booths

Lobby attendant Lobby Attendant Required

Recording Record session

Reactions Enable Reactions

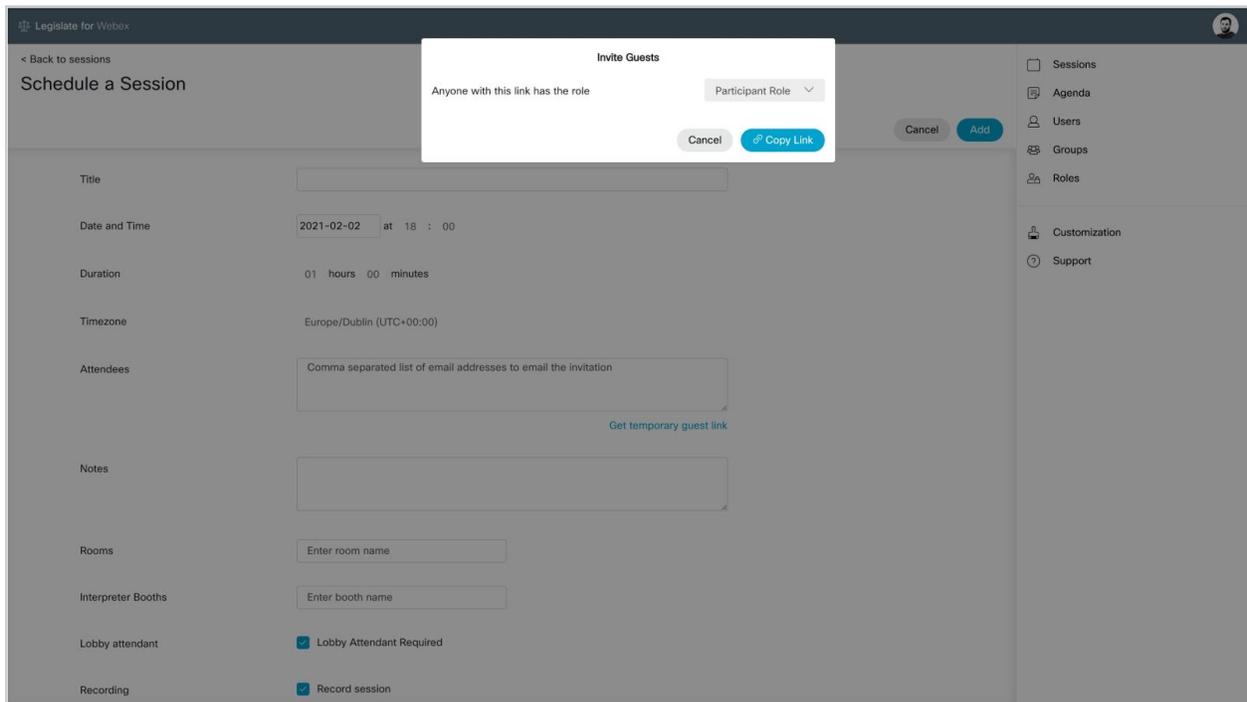
Agenda To add more agenda items, use the agenda page

- Sessions
- Agenda
- Users
- Groups
- Roles
- Customization
- Support

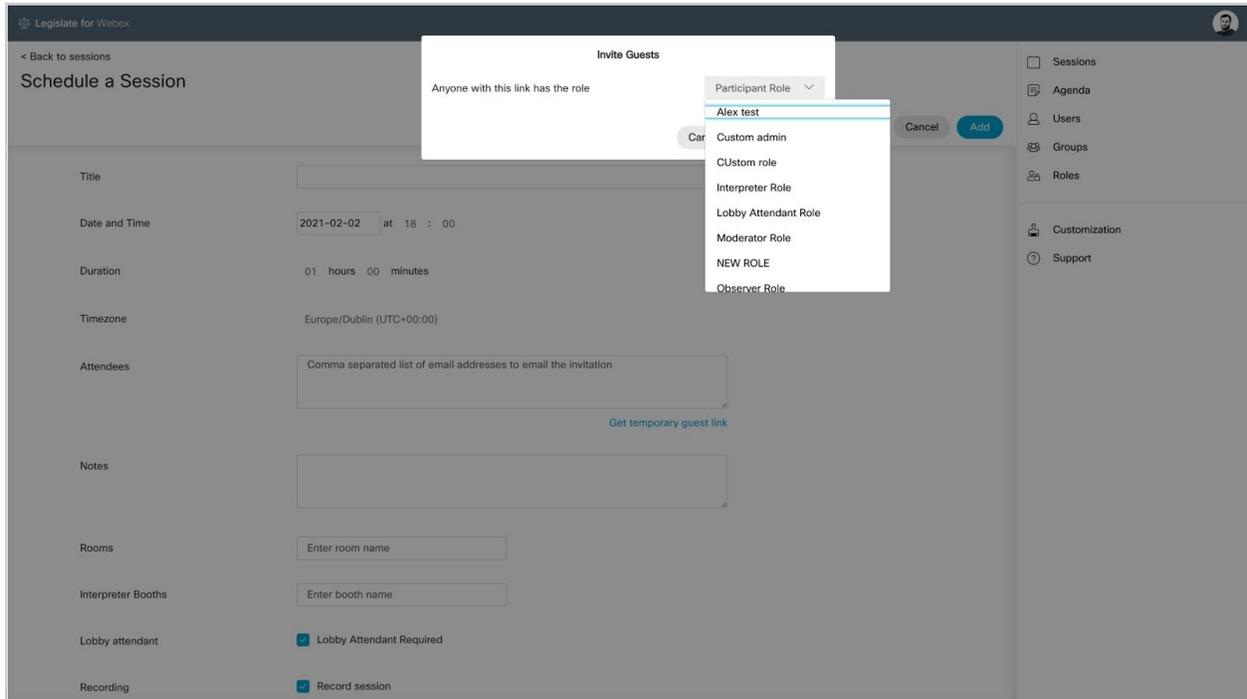
You are required to fill out the following information for each session:

- The session title.
- The session date and time.
- Session duration.
- Timezone.
- Add attendees with their email addresses.

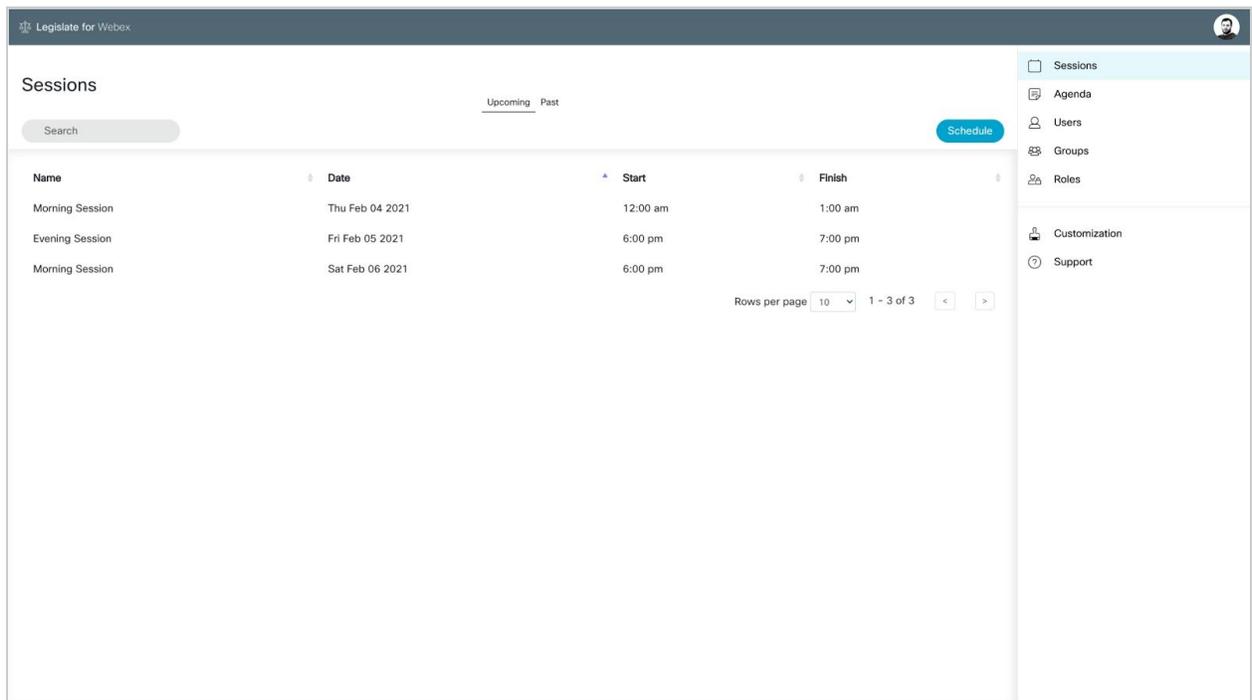
- Additional notes on the session, links, or documentation.
- Check the box if the session requires a lobby attendant.
- Check the box if you want to record the session.



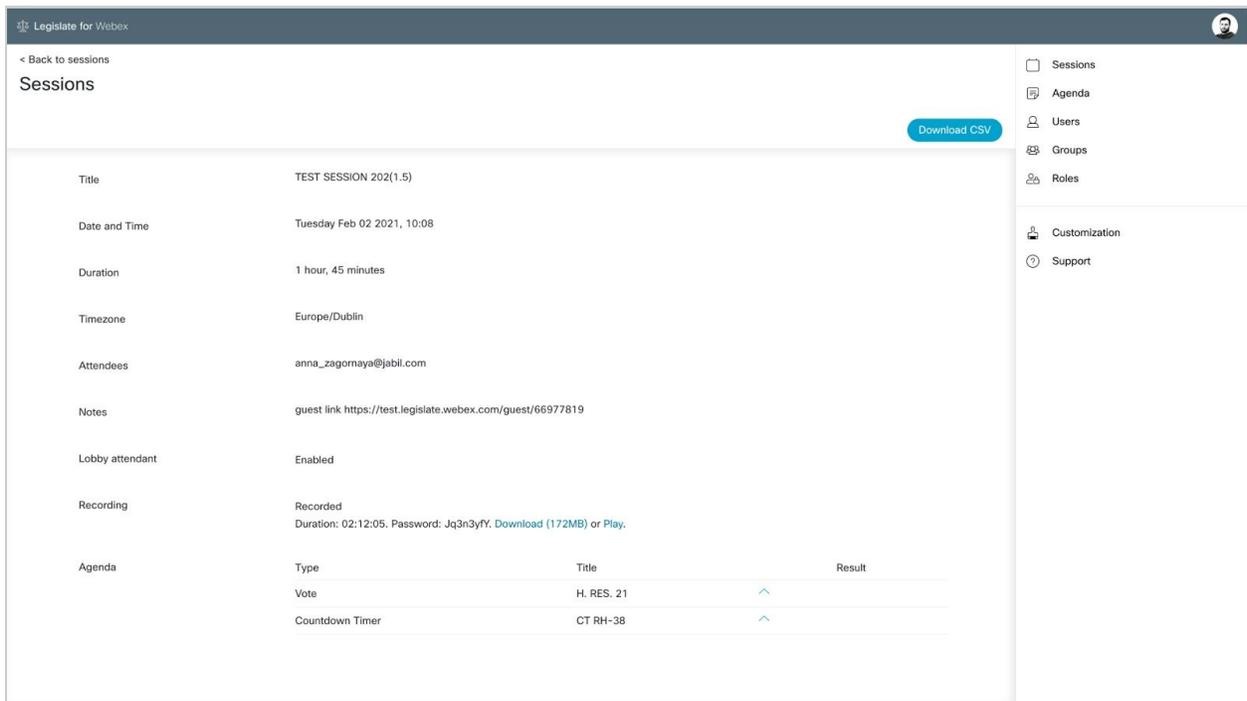
Guests can be added to the session using the 'Get temporary guest link' link.



Guests need to be assigned a role for the legislative session then a new guest link is created and saved to the clipboard.



The session list displays the session.

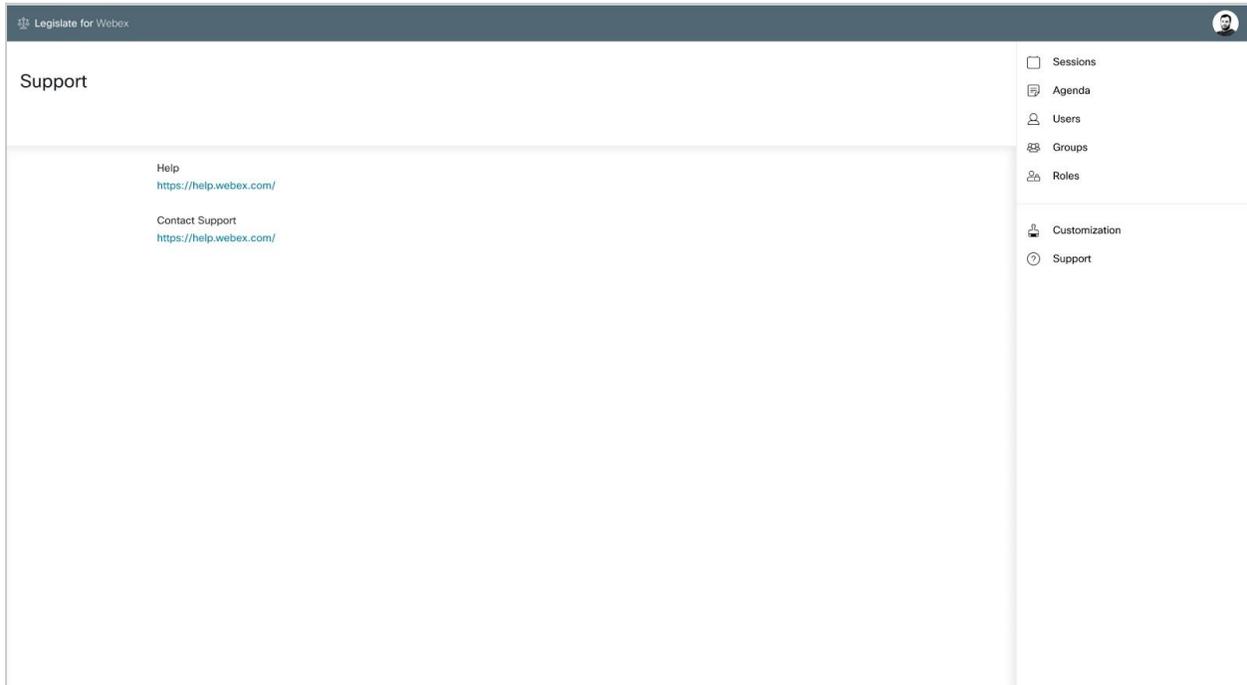


The screenshot shows the 'Sessions' page in the 'Legislate for Webex' interface. The page has a dark header with the title 'Legislate for Webex' and a user profile icon. Below the header, there is a navigation bar with '< Back to sessions' and 'Sessions'. A 'Download CSV' button is located in the top right corner of the main content area. The main content area displays session details for 'TEST SESSION 202(1.5)'. The details are as follows:

Title	TEST SESSION 202(1.5)									
Date and Time	Tuesday Feb 02 2021, 10:08									
Duration	1 hour, 45 minutes									
Timezone	Europe/Dublin									
Attendees	anna_zagornaya@jabll.com									
Notes	guest link https://test.legislate.webex.com/guest/66977819									
Lobby attendant	Enabled									
Recording	Recorded Duration: 02:12:05. Password: Jq3n3yfy. Download (172MB) or Play .									
Agenda	<table border="1"><thead><tr><th>Type</th><th>Title</th><th>Result</th></tr></thead><tbody><tr><td>Vote</td><td>H. RES. 21</td><td>^</td></tr><tr><td>Countdown Timer</td><td>CT RH-38</td><td>^</td></tr></tbody></table>	Type	Title	Result	Vote	H. RES. 21	^	Countdown Timer	CT RH-38	^
Type	Title	Result								
Vote	H. RES. 21	^								
Countdown Timer	CT RH-38	^								

On the right side of the page, there is a sidebar with navigation options: Sessions, Agenda, Users, Groups, Roles, Customization, and Support.

Sessions can be edited by clicking on the individual session.



This page can be used to access Legislate for webex support and help.