



Administration

Creating Reports and Starting Workflows



Legal and Legislative Services

February 2023

How to Create Reports and Start Workflows in eScribe


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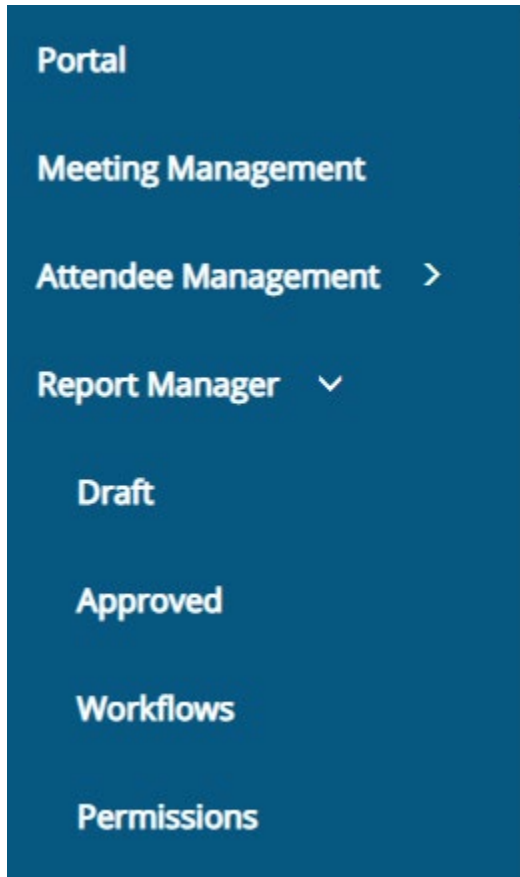
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Creating a Draft Report

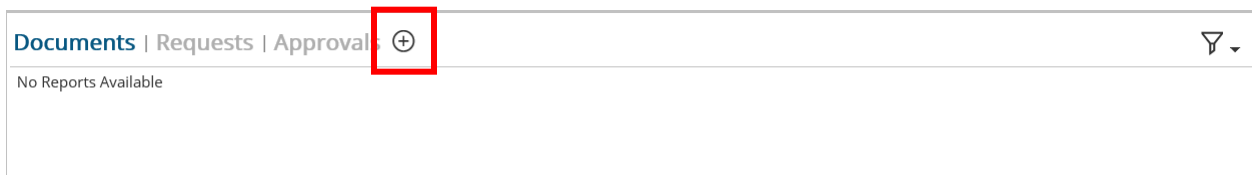
Log in to the following website:

<https://townofessex.escribemeetings.com>

1. Access Draft Report screen by clicking on this icon  at the top left of your screen. Proceed to:
 - a. Report Manager
 - b. Draft



2. The following screen will appear, select the circle with the plus sign button to create a report.



- The following screen will appear. Complete the details (listed below) to create the report. Select Create to create report. The draft report will open in Microsoft Word, displaying the appropriate template for the type of report you have selected.

Create Report ✖

Meeting Type*	-- Select A Meeting Type --
Meeting Date	
Category ⊙	-- Select a Category --
Department*	-- Select a Department --
Branch	
Report Template*	Please Select Report Template
File Name*	
Closed Session Reasons	<input type="checkbox"/>

Report Number [Assign](#)

Sponsor(s)

Awaiting Attachments

Attachments

Name	Size
There are no supporting documents.	
Choose File	No file chosen

[Upload](#)

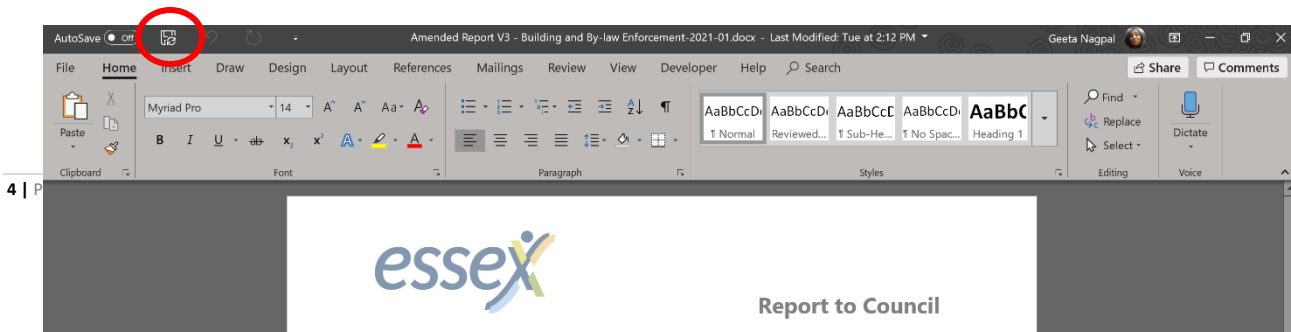
Contributor Comments

[Create](#) [Cancel](#)

- Category will be Reports from Administration for Reports.
- You must select Department and Branch.
- File name has a character limit.
- You DO NOT have to assign a Report Number at this stage.
- Meeting date is required to assign a Report Number.

Note: Once you assign the report number it is automatically transferred into your Report. However, please wait until you have drafted your Report to assign a Report number to ensure continuous numbering among all Report authors in your Department.

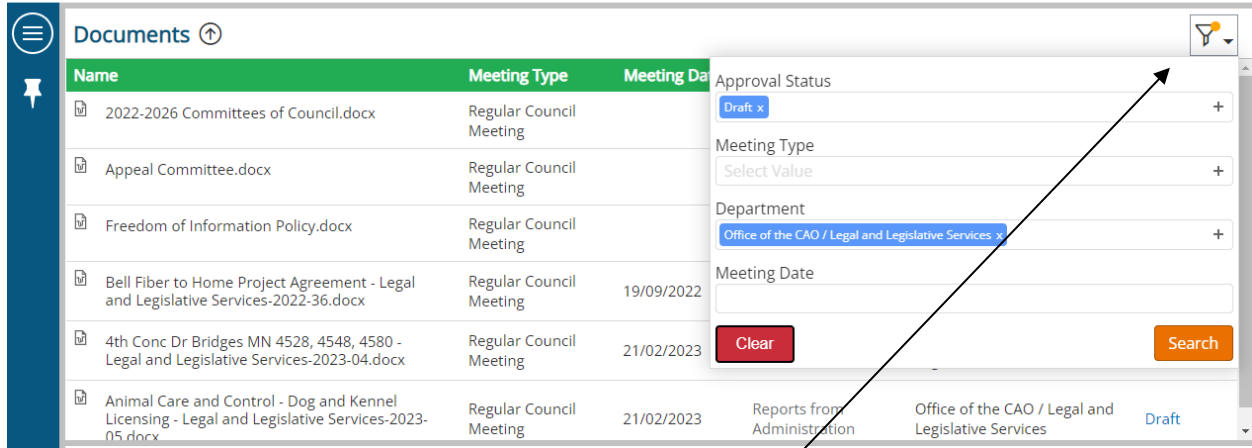
When you are finished working on the report, click **Save icon**. Microsoft Word will automatically save the document into the Reports library in eScribe with the status set to **Draft**.



Opening a Draft Report

You can open a Report from the main portal screen by clicking on the name of the report.

essex



The screenshot shows a web interface titled 'Documents'. On the left is a navigation menu with a hamburger icon and a pin icon. The main area contains a table with columns: Name, Meeting Type, Meeting Date, Approval Status, Meeting Type, Department, and Meeting Date. A filter overlay is open on the right side of the table, showing fields for Approval Status (with a 'Draft x' button), Meeting Type (with a 'Select Value' dropdown), Department (with 'Office of the CAO / Legal and Legislative Services' selected), and Meeting Date (with a 'Clear' button). A 'Search' button is at the bottom right of the filter. An arrow points from the filter icon in the top right of the table to the filter overlay.

Name	Meeting Type	Meeting Date	Approval Status	Meeting Type	Department	Meeting Date
2022-2026 Committees of Council.docx	Regular Council Meeting		Draft x	Select Value	Office of the CAO / Legal and Legislative Services	
Appeal Committee.docx	Regular Council Meeting					
Freedom of Information Policy.docx	Regular Council Meeting					
Bell Fiber to Home Project Agreement - Legal and Legislative Services-2022-36.docx	Regular Council Meeting	19/09/2022				
4th Conc Dr Bridges MN 4528, 4548, 4580 - Legal and Legislative Services-2023-04.docx	Regular Council Meeting	21/02/2023				
Animal Care and Control - Dog and Kennel Licensing - Legal and Legislative Services-2023-05.docx	Regular Council Meeting	21/02/2023	Reports from Administration	Office of the CAO / Legal and Legislative Services		Draft

Note: You can filter reports by selecting the Filter icon

You can also filter by using the dropdown menu next to any of the headings.



The screenshot shows a dropdown menu for the 'Meeting Type' column. The menu is open, showing options: Sort Ascending, Sort Descending, Clear Filter from Name, and a list of report names. The report names are: 4th Conc Dr Bridges MN 4528, 4548, 4580 - Legal and Legislative Services-2023-04.docx, Animal Care and Control - Legal and Legislative Services-2023-05.docx, Bi-Annual By-law Enforcement Report (July-December 2022) - Building and By-law Enforcement-2023-01.docx, Building Report and Development Overview - January 2023 - Economic Development-2023-02.docx, and Jakana Residential Subdivision (Ward 1) - Planning-2023-04.docx.

Viewing and Editing Report Properties

To view or edit the report details, go to the draft report section (select circle with 3 lines icon, Report Manager, Draft).

Hover over the name of the report you wish to view or edit, and select the dropdown box to the right. The following screen will appear.



To edit report properties, select **Edit Properties** from the dropdown menu.

Edit Properties allows you to change the meeting date, assign report numbers and upload supporting documents.

Edit in Microsoft Word opens the report without needing to go into the Edit Report Properties screen.

Workflows is where the approval process is started. (See "Starting Workflows" later in this document).

Email a Link automatically opens Outlook with a link to the Report. *This is used to send draft reports to staff who need to review the report.* **Note:** To access reports the staff member must have access to eScribe and have permission to access the Report. (See Manage Permissions below)

Alert Me is used to alert the Report writer of any changes made to the document.

Version History shows the history of the report and allows the report writer to revert back to previous versions of the report but clicking on the date and time of the version.

Manage Permissions is where users are added and type of access is granted.

Edit Permissions ✖

[2022-2026 Committees of Council.docx](#)

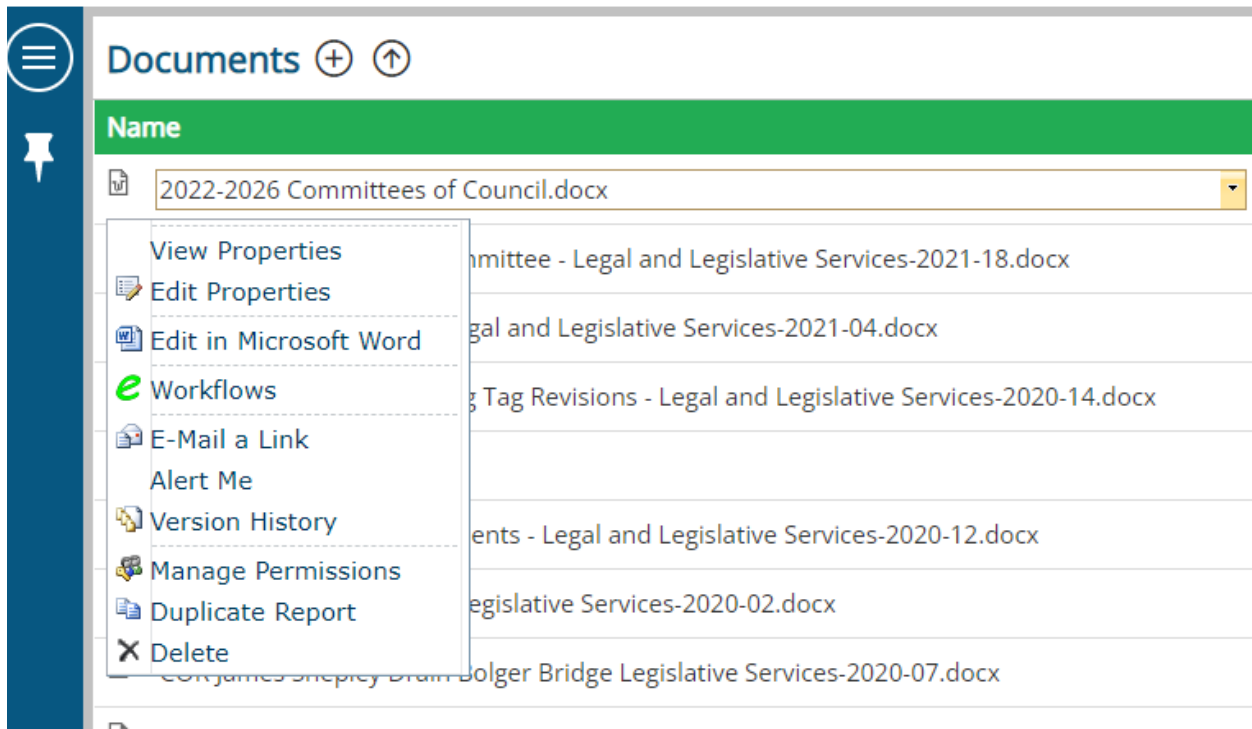
Name	Full Access	Contributor	Read Only	Remove
eScribe Administrators	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Robert Auger, Director, Legal and Legislative Services/Clerk	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shelley Brown, Acting Clerk, Legal and Legislative Services	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Meeting Type's Workflow Administrators	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Doug Sweet, Chief Administrative Officer	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kate Giurissievich, Director, Corporate Services	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Maja Bakalic, Assistant Manager, Legal and Legislative Services	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Duplicate Report allows the creator of the report to duplicate the report. Note: All attachments are included.

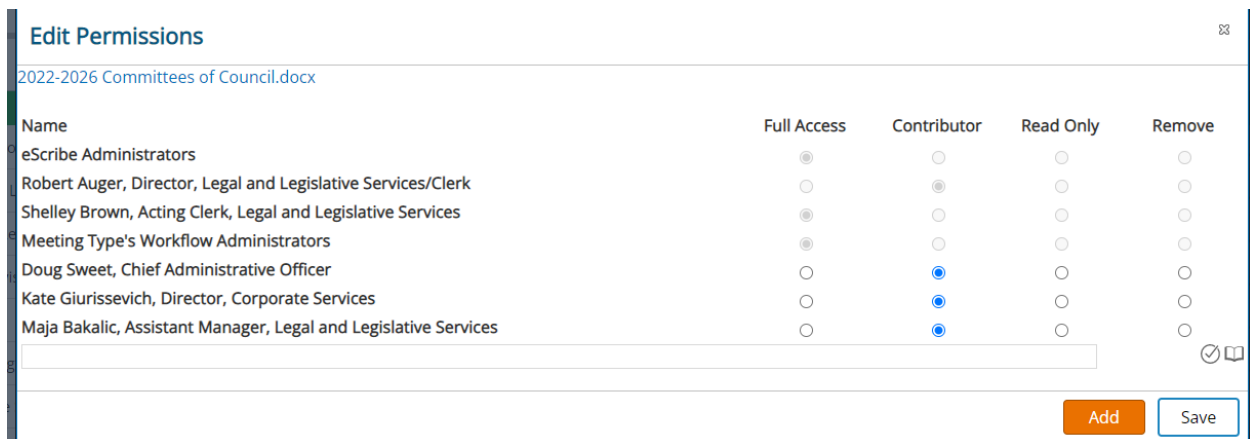
Delete will delete the report entirely.

Circulating a Draft Report for Review

Draft reports should be circulated to allow reviewers sufficient time to review prior to commencing the Workflow. Using the dropdown menu, select the **E-Mail a Link** option. An email will open with a link to the Report.



Please note that reviewers/users must have permission in eScribe to open and edit a Report. You can verify access by going to **Manage Permissions**.

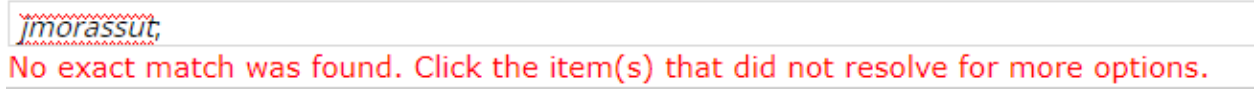


To change the access of a user already listed, select the circle in the appropriate column and save.

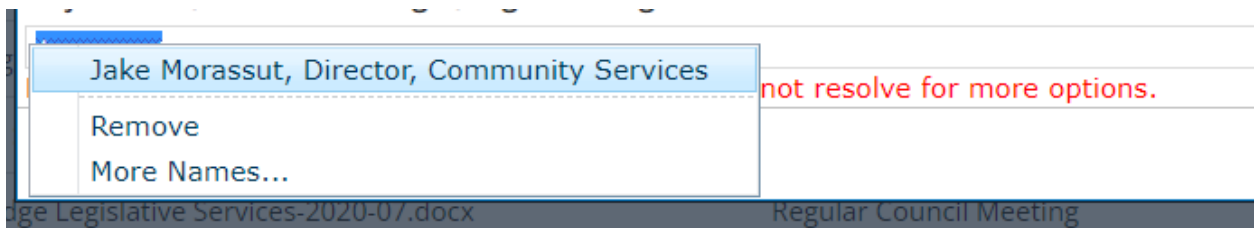
To add an eScribe user, type their name in the box and press the checkmark icon.



If you receive this error,



Click on the name and press the checkmark icon and then select **Add**.



Verify that they have the appropriate access and amend as needed.

Hint: If you want to be alerted when changes are made to your report, use the **Alert Me** function from the dropdown menu.

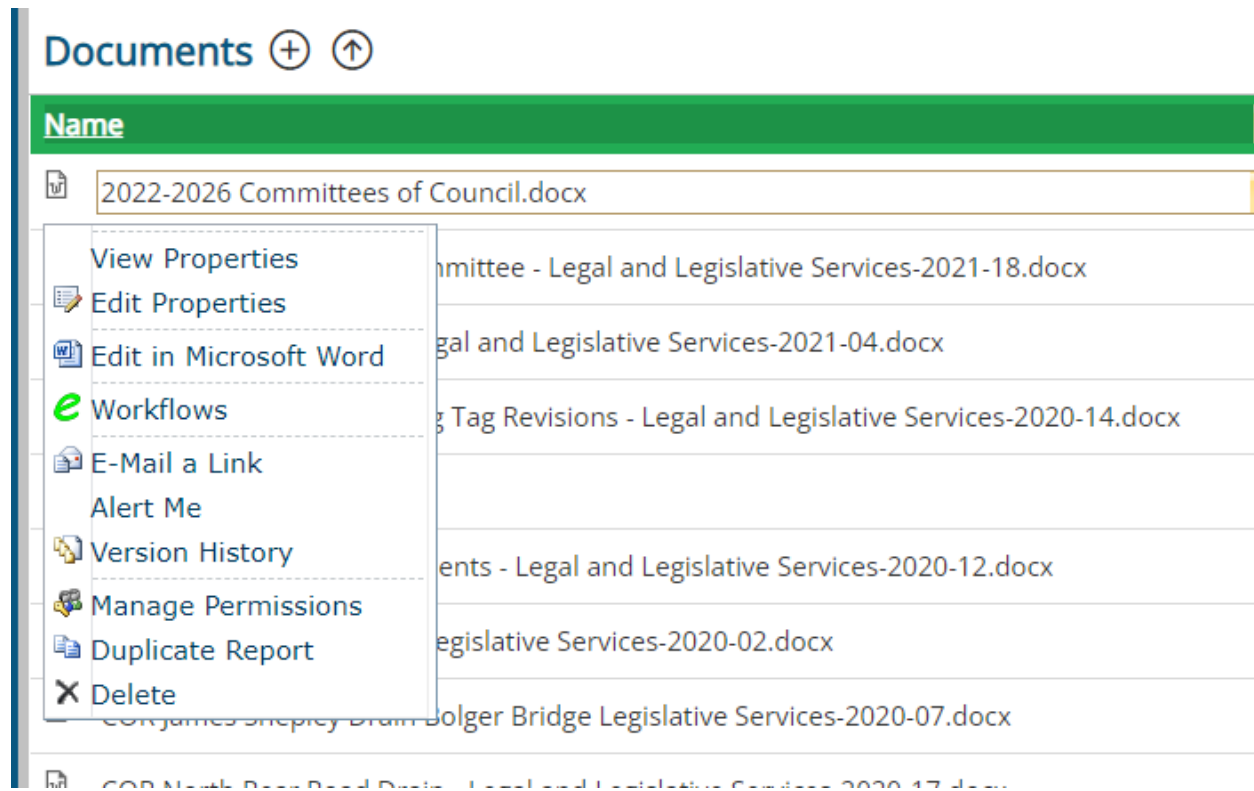
Starting a Workflow

Workflow is the final stage of the process and is started once all changes have been made to the report. It is not meant to be a part of the draft review stage.

Workflows are to be started to allow enough time for approvals and addition to corresponding agendas.

Note: Agenda items are due no later than 12:00pm on the Tuesday preceding the Council Meeting.

To start the workflow, select **Workflows** from the dropdown menu.



Select the appropriate approval group from the **Approval Group** dropdown menu. There will be four options:

Using Legal & Legislative Services as an example:

- Office of the CAO – Legal and Legislative Services is used for general reports and is circulated to the appropriate staff within that department.
- Office of the CAO – Legal and Legislative Services **Financial & Legal Implications** is circulated to the appropriate staff within that department as well as the Director, Corporate Services
- Office of the CAO – Legal and Legislative Services **Financial Implications** is circulated to the appropriate staff within that department as well as the Director, Corporate Services and Director, Legal & Legislative Services
- Office of the CAO – Legal and Legislative Services **Legal Implications** is circulated to the appropriate staff within that department as well as the Director, Legal & Legislative Services

Approvers are setup in each workflow specific to the department and branch you selected when you create the report.

Once a workflow is commenced, approvers will receive an email notification in the order specified in their workflow.

Note: The next approver in the workflow will not be notified until the approver before them approves the report. Please be mindful of this as it can hold up the entire approval process.