



# Sequential Numbering

Updated July 20 2021

Primarily used in Ordinance or Resolution numbering, but available to use for any sequential numbering purpose – PrimeGov’s sequential numbering allows you to:


- Define a custom counter for your sequential number format, with support for fixed text and variables, including month, year, and item type
- Link the counter definition to an item type so that each item of this type will be assigned a number from that particular counter
  - o A single counter can be used on one or multiple item types, allowing you the flexibility to keep a consistent numbering scheme across varying content
- Apply the counter to the item at a variety of points in the system:
  - o When the item is created
  - o When the first successful vote is taken on the item
  - o At any time by selecting ‘Apply Sequential Number’
  - o In bulk across an entire meeting – selecting the required items to number and applying the relevant counter for each item type (Coming Soon)
- Remove the applied sequential number, with an option to renumber subsequent entries to remove any skipped numbers in your sequence
- Refer to the applied sequential number in documents related to the item

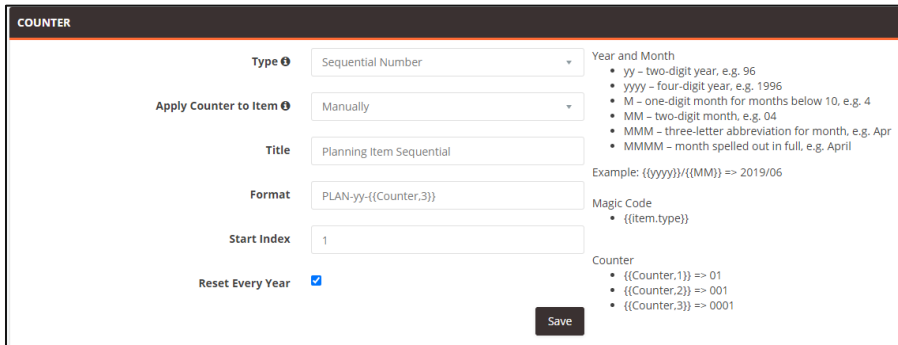
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## Define A Custom Counter for Sequential Numbering

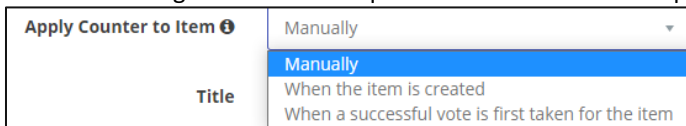
The first step in using sequential numbering is to define a custom counter for your numbering

1. Navigate to Admin -> System Administration -> Counter
2. Select the  icon to add a new counter definition



The screenshot shows the 'COUNTER' configuration form. It includes fields for 'Type' (set to 'Sequential Number'), 'Apply Counter to Item' (set to 'Manually'), 'Title' (set to 'Planning Item Sequential'), 'Format' (set to 'PLAN-yy-{{Counter,3}}'), and 'Start Index' (set to '1'). There is a 'Reset Every Year' checkbox which is checked. On the right side, there is a 'Year and Month' section with a list of format codes: yy (two-digit year), yyyy (four-digit year), M (one-digit month), MM (two-digit month), MMM (three-letter abbreviation), and MMMM (month spelled out). Below this is an 'Example' showing '2019/06'. There is also a 'Magic Code' section with a list of codes: {{item.type}}, {{Counter,1}}, {{Counter,2}}, and {{Counter,3}}. A 'Save' button is at the bottom right.

3. Select 'Sequential Number' in the 'Type' drop down
  - a. This will ensure the counter definition is linked to the correct field in the item when the sequential number is applied
  - b. Once the counter has been created this field cannot be adjusted
4. Select the timing for when the sequential number should be applied to the item.





The screenshot shows the 'Apply Counter to Item' dropdown menu. The 'Manually' option is selected and highlighted in blue. Other options visible are 'When the item is created' and 'When a successful vote is first taken for the item'.

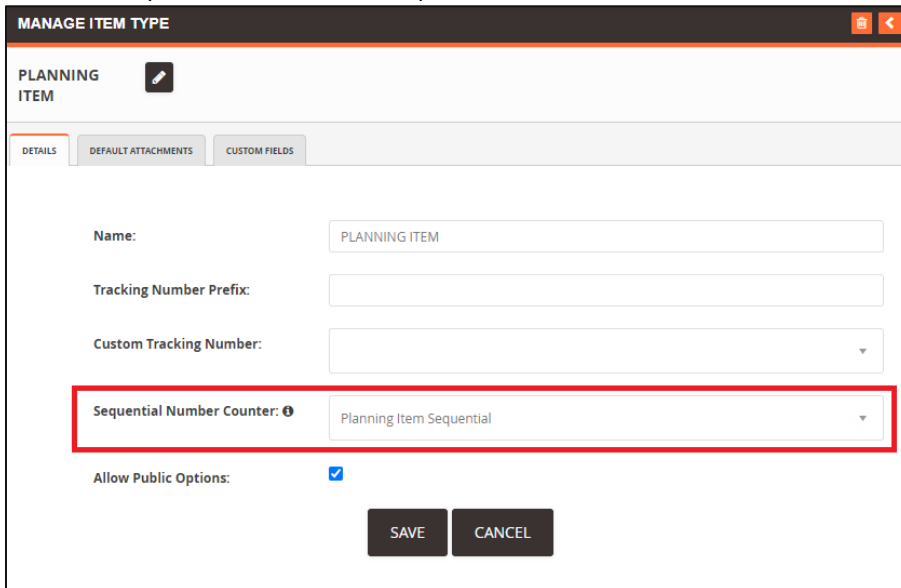
Select from:

- a. Manually – allows you to apply the next sequential number to individual items or to apply in bulk in the pre-meeting area
  - b. When the item is created – will apply the next sequential number to individual items when the item is first created
  - c. When a successful vote is first taken for the item – will apply the next sequential number to the item when the first vote recorded as “Pass” is taken in Live Meeting
5. Provide an informative title to the counter, this will be used when selecting the counter to link with an item type
  6. Enter the required format – format supports any fixed text you wish to enter, plus variables – see the variable support on the right of the counter definition for support on these
    - a. All counter definitions require {{Counter,X}} which is where the sequential number will be placed in your counter text. X refers to the number of padded zeros you wish to include from the beginning – see samples on the right of the counter definition for examples of this
  7. Enter the 'Start Index' which is the number you wish to start the counter from, typically 1 but can be any number required
    - a. Once the counter has been created this field cannot be adjusted. A new field, 'Current Index', will instead appear and can be adjusted to adjust the next number in the sequence
  8. Optionally, select to reset the index each year. Do not select if you wish the counter to continue across years

## Link A Custom Counter for Sequential Numbering to an Item Type

Once a counter has been created it can be associated with one or more item types to link the counter with the items. Once a counter has been linked to an item type, the counter will be applied according to the counter definition parameters

1. Navigate to Admin -> System Administration -> Item Types
2. Select the  icon to update your required item type
3. Select the  icon to update the item type settings
4. Select the required counter under 'Sequential Number Counter'

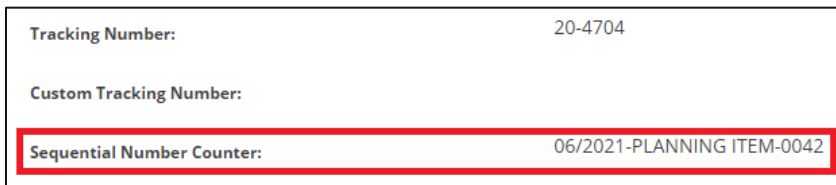


The screenshot shows the 'MANAGE ITEM TYPE' interface for 'PLANNING ITEM'. It has tabs for 'DETAILS', 'DEFAULT ATTACHMENTS', and 'CUSTOM FIELDS'. The 'DETAILS' tab is active. Fields include 'Name' (PLANNING ITEM), 'Tracking Number Prefix', 'Custom Tracking Number', and 'Sequential Number Counter' (highlighted with a red box and set to 'Planning Item Sequential'). There is also a checkbox for 'Allow Public Options' which is checked, and 'SAVE' and 'CANCEL' buttons at the bottom.

5. Select 'Save'

## Apply Sequential Number

The sequential number is applied to the item based on the configuration set and is applied to the 'Sequential Number Counter' field which appears in the item details area.



The screenshot shows item details with 'Tracking Number: 20-4704', 'Custom Tracking Number', and 'Sequential Number Counter: 06/2021-PLANNING ITEM-0042' (highlighted with a red box).

## Apply Sequential Number on Item Creation

If a counter is configured to apply the next sequential number "When the item is created" – the sequential number will be automatically applied and saved to the item when the item is first created

## Apply Sequential Number on Successful Vote

If a counter is configured to apply the next sequential number "When a successful vote is first taken for the item" – the sequential number will be automatically applied and saved to the item when the first vote passes in Live Meeting.

- Failed votes will not apply the sequential number to the item
- Once the sequential number is applied, subsequent votes will not affect the sequential number in any way

## Apply Sequential Number Manually

If a counter is configured to apply the next sequential number "Manually" – the sequential number will be applied only when the user selects to apply the number. This can be done from the pre-meeting page, from the item details, and from Live Meeting


### Apply From Pre-Meeting

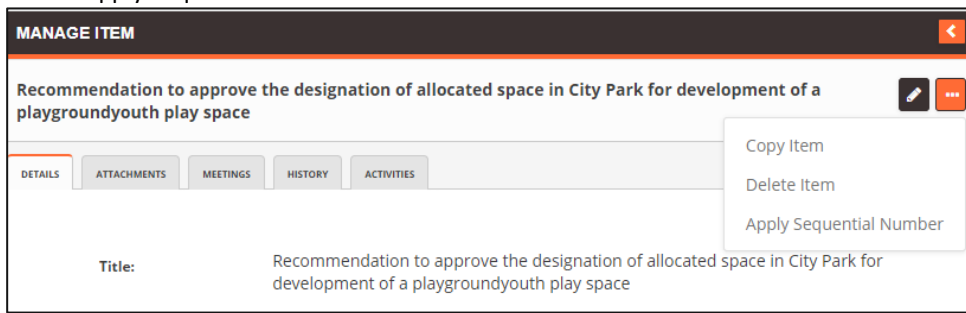
1. Select the item menu from the meeting page and select 'Apply Sequential Number'



2. A success message will appear on the top right


### Apply from Item Details

1. Access the item details
2. Select the item menu, by selecting 
3. Select 'Apply Sequential Number' in the item menu



4. A success message will appear on the top right

### Apply from Live Meeting

1. Select the item menu, by selecting  from the live meeting page
2. Select 'Apply Sequential Number' in the options menu



3. A success message will appear on the top right

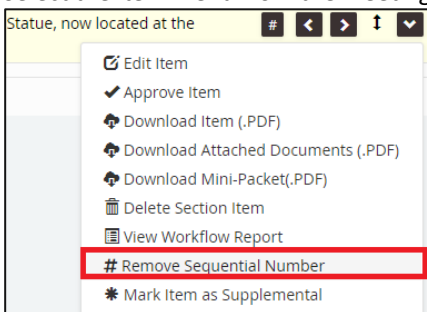
### Apply Sequential Number In Bulk Across A Single Meeting (Coming Soon)

## Remove Sequential Number

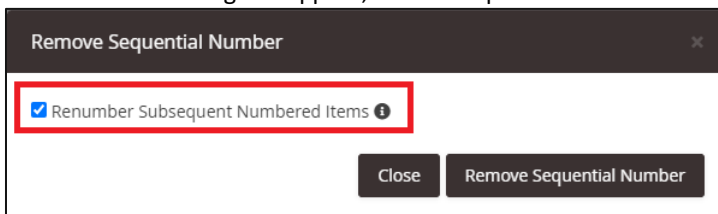
If a counter has been applied to an item – the sequential number will be applied only when the user selects to apply the number. This can be done from the pre-meeting page, from the item details, and from Live Meeting

### Remove From Pre-Meeting

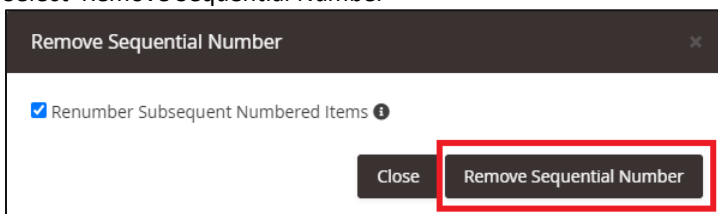
1. Select the item menu from the meeting page and select 'Remove Sequential Number'



2. A confirmation dialog will appear, with the option to renumber subsequent numbered items




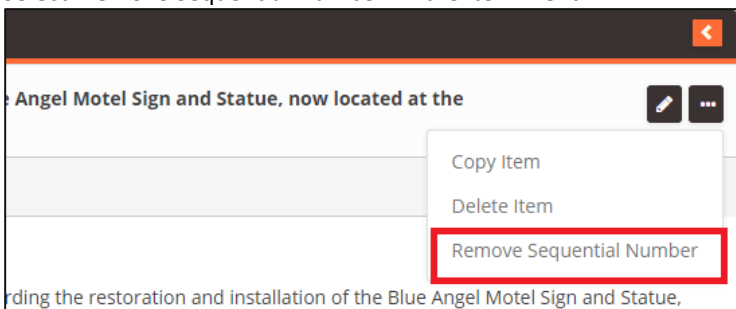
- a. Enable this option if wish to remove the sequential number value from this item and update all subsequent items numbered using this sequential counter to ensure no gap in numbering exists as a result of removing the number from this item.
    - i. Only items numbered by this sequential counter type, after this items' sequential number was applied, will be affected
  - b. Disable this option if you wish to remove the sequential number value from this item but leave all other numbered items as they are
3. Select 'Remove Sequential Number'



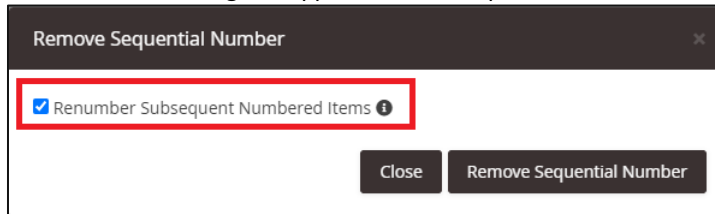
4. The number will be removed from the item, and subsequent items affected by the associated sequential counter will also be updated if the renumber subsequent numbered items option was selected
  - a. This item will be available for numbering again, based on the rules set in the counter type associated with the item
5. A success message will appear on the top right

### Remove from Item Details

1. Access the item details
2. Select the item menu, by selecting 
3. Select 'Remove Sequential Number' in the item menu



4. A confirmation dialog will appear, with the option to renumber subsequent numbered items

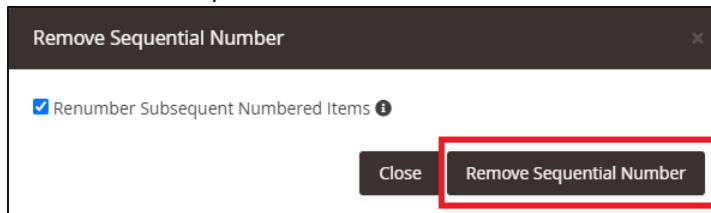


Remove Sequential Number

☒ Renumber Subsequent Numbered Items ⓘ

Close Remove Sequential Number

- a. Enable this option if wish to remove the sequential number value from this item and update all subsequent items numbered using this sequential counter to ensure no gap in numbering exists as a result of removing the number from this item.
    - i. Only items numbered by this sequential counter type, after this items' sequential number was applied, will be affected
  - b. Disable this option if you wish to remove the sequential number value from this item but leave all other numbered items as they are
5. Select 'Remove Sequential Number'




Remove Sequential Number

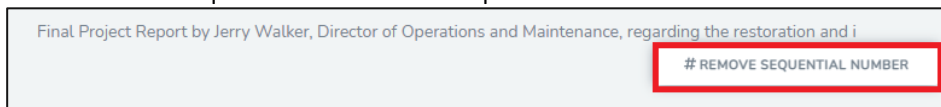
☒ Renumber Subsequent Numbered Items ⓘ

Close Remove Sequential Number

6. The number will be removed from the item, and subsequent items affected by the associated sequential counter will also be updated if the renumber subsequent numbered items option was selected
  - a. This item will be available for numbering again, based on the rules set in the counter type associated with the item
7. A success message will appear on the top right

### *Remove from Live Meeting*

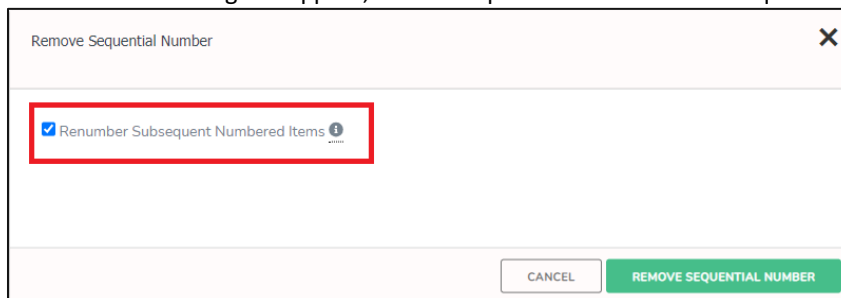
1. Select the item menu, by selecting , from the live meeting page
2. Select 'Remove Sequential Number' in the options menu



Final Project Report by Jerry Walker, Director of Operations and Maintenance, regarding the restoration and i

# REMOVE SEQUENTIAL NUMBER

3. A confirmation dialog will appear, with the option to renumber subsequent numbered items

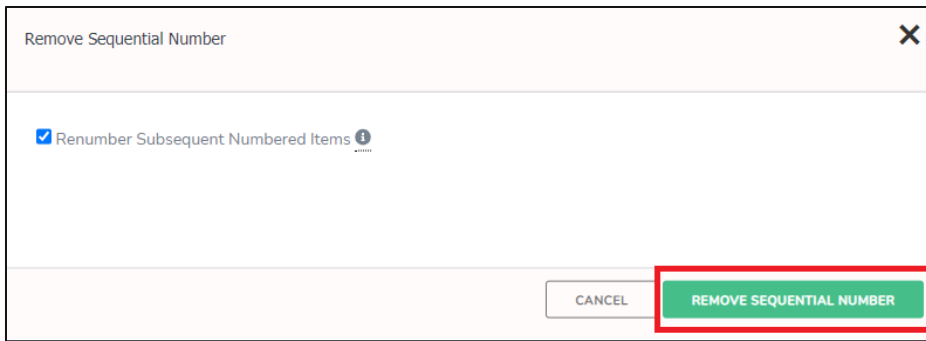


Remove Sequential Number

☒ Renumber Subsequent Numbered Items ⓘ

CANCEL REMOVE SEQUENTIAL NUMBER

- a. Enable this option if wish to remove the sequential number value from this item and update all subsequent items numbered using this sequential counter to ensure no gap in numbering exists as a result of removing the number from this item.
    - i. Only items numbered by this sequential counter type, after this items' sequential number was applied, will be affected
  - b. Disable this option if you wish to remove the sequential number value from this item but leave all other numbered items as they are
2. Select 'Remove Sequential Number'



Remove Sequential Number

☒ Renumber Subsequent Numbered Items i

CANCEL REMOVE SEQUENTIAL NUMBER

3. The number will be removed from the item, and subsequent items affected by the associated sequential counter will also be updated if the renumber subsequent numbered items option was selected
  - a. This item will be available for numbering again, based on the rules set in the counter type associated with the item
4. A success message will appear on the top right