BATS provides the ability to view and maintain information about people (contacts) that an agency works with. For example, a contact may be a Subject Matter Expert (SME), code reviser attorney, or other stakeholder.

- All contacts may be linked (connected) to bill-related information in BATS.
- Internal contacts may have the ability to access specific functions and information within BATS.
- External contacts will include legislative sponsors. These sponsors will be updated (imported) from the Legislative Service Center (LSC) database and linked to an external contacts group available to all agencies.

Type	Maintained by	Description
Internal Contacts	**Agency Administrator**	May have ability to access specific functions and information within BATS (userid controlled by role based security). ❖ Linked to agency administrator Business Unit. ❖ Usually within the same agency (exception may include city, county, and military staff responsible for using the system tracking functions).
External Contacts	**Agency User**	Does not have ability to access specific functions and information within BATS (does not have userid). ❖ Linked to user (owner) Business Unit. ❖ Sponsors will be updated (imported) from Legislative Service Center (LSC) database and linked to an external contacts group available to all agencies. ❖ Usually in another agency.
External Entities	**Agency User**	Does not have ability to access specific functions and information within BATS (does not have userid). ❖ Linked to user (owner) Business Unit. ❖ Not a state agency.

This document will provide an overview of the basic contact functions, including:

- View (Display) Contact Information.
- Manage Internal Contacts.
- Manage External Contacts.
- Manage External Entities.

View (Display) Contact Information

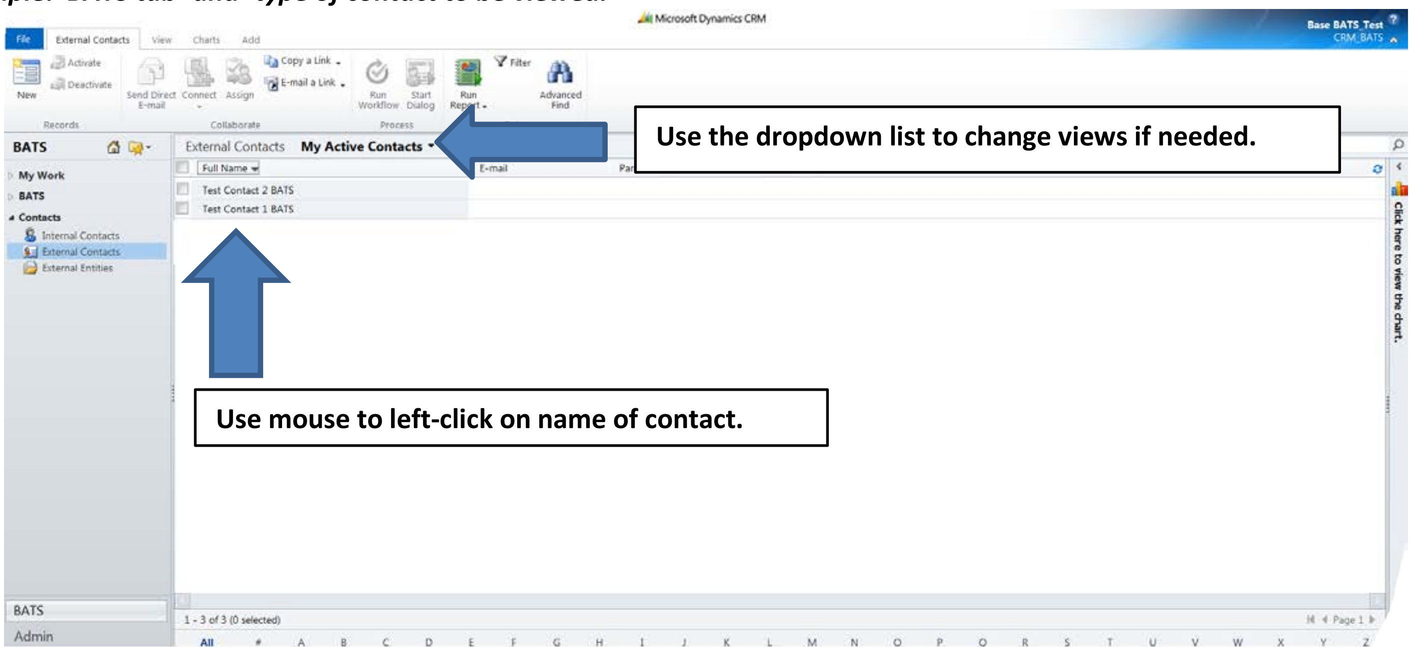
The ability to view (display) contact information is based on the business unit (and/or group) associated with the contact.

To view (display) contact information:

1. **Select:** BATS tab (left-side navigation pane).
2. **Select:** Contacts (left-side navigation pane).
3. **Select:** Type of contact (Internal Contacts or External Contacts or External Entities).
4. **Scroll**: To find the contact (use the dropdown list to change views if needed to narrow the list of contacts).
5. **Select**: Name of contact (use the mouse to left-click on the name of the contact).

☑**Result**: Contact information is displayed. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: BATS tab -and- type of contact to be viewed.



Internal Contacts

BATS uses internal contacts for security functions as well as bill-related processes so internal contacts are linked to the agency administrator Business Unit.

- ❖ Internal contacts are linked to security functions. One or more roles can be assigned to an internal contact to provide the ability to access specific functions and information (userid controlled by role based security).

The following information is required to manage internal contacts.

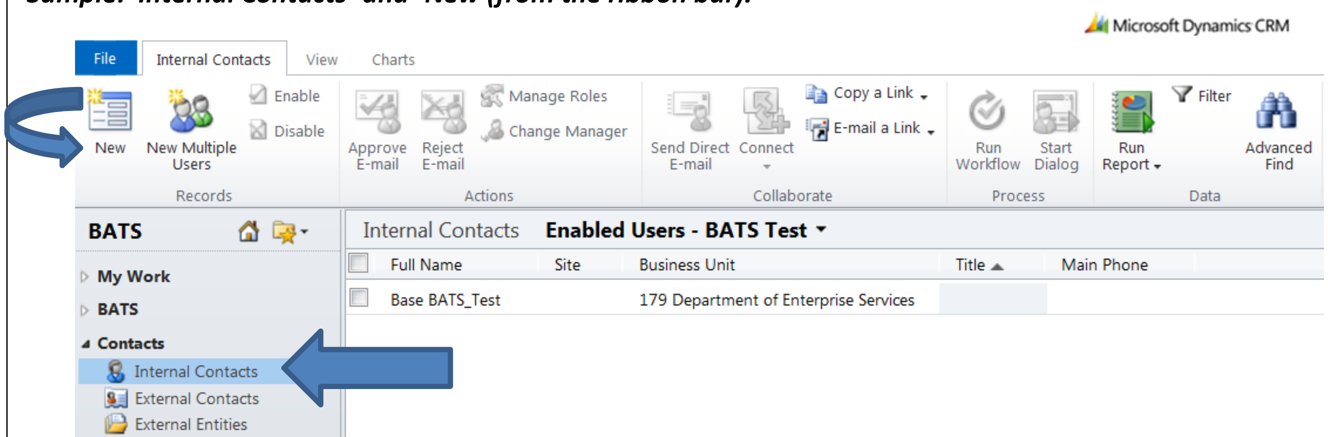
Required Field*	Value	Additional Information
User Name*	NetworkLogonID –or- Domain\NetworkLogonID ❖ Example: BaseBATSTest. ❖ Example: OFM\BaseBATSTest. Note: Secure Access Washington (SAW) user name is the email that is registered with SAW account. ❖ Example: username@emailDomain.gov.	BATS validates this information with the state Active Directory system. ❖ Other fields on the page will be populated with default values based on the NetworkLogonID. Note: Secure Access Washington (SAW) user name is not validated against the state Active Directory system so other fields on the page will not be populated with default values.
First Name*	First Name of internal contact	BATS will automatically populate this value from the state Active Directory system if a valid Domain\NetworkLogonID –or- NetworkLogonID is input in the User Name field.
Last Name*	Last Name of internal contact	BATS will automatically populate this value from the state Active Directory system if a valid Domain\NetworkLogonID –or- NetworkLogonID is input in the User Name field.
Business Unit*	Agency Business Unit	The default value is same as the Business Unit (agency) assigned to the Agency Administrator.
E-mail access type – Incoming* Outgoing*	Microsoft Dynamics CRM for Outlook	The default value is Microsoft Dynamics CRM for Outlook. ❖ Do not change this value.
Access Mode*	Read-Write	The default value is Read-Write. ❖ Do not change this value.
License Type*	Full	The default value is Full. ❖ Do not change this value.

Add New Internal Contact
Internal contacts are linked to the agency administrator Business Unit.

To add a new internal contact:
1. **Select:** BATS tab (left-side navigation pane).
2. **Select:** Contacts (left-side navigation pane).
3. **Select:** Internal Contacts.
4. **Select**: New (from the ribbon bar).
5. **Input:** Information about the new contact. Required fields are marked with *.
6. **Select:** Save.

☑**Result**: New contact is added. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Internal Contacts -and- New (from the ribbon bar).



Edit (update) Information About an Internal Contact

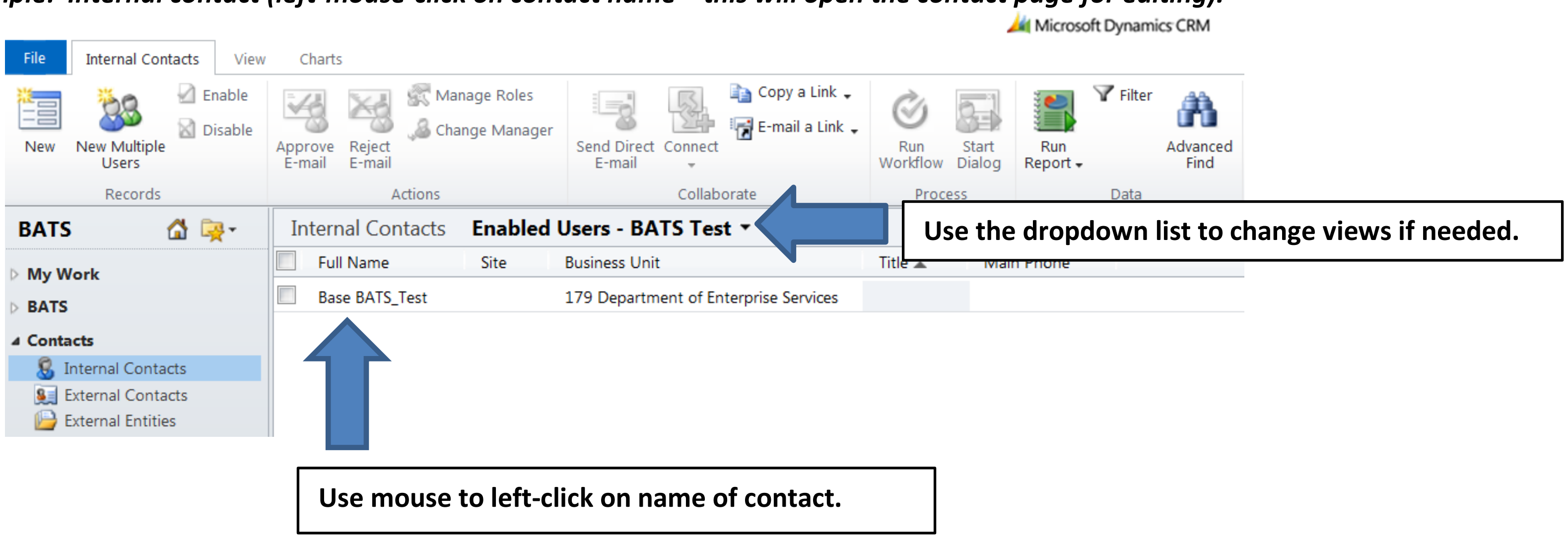
Internal contacts are linked to the agency administrator Business Unit.

To edit (update) internal contact information:

1. **Select:** BATS tab (left-side navigation pane).
2. **Select:** Contacts (left-side navigation pane).
3. **Select:** Internal Contacts.
4. **Scroll**: To find the contact (use the dropdown list to change view if needed to narrow the list of contacts).
5. **Select**: Contact (left-mouse-click on the user name).
6. **Input:** Information about the contact.
7. **Select:** Save.

☑**Result**: Contact information is updated. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Internal contact (left-mouse-click on contact name – this will open the contact page for editing).



Enable (Activate) Internal Contact

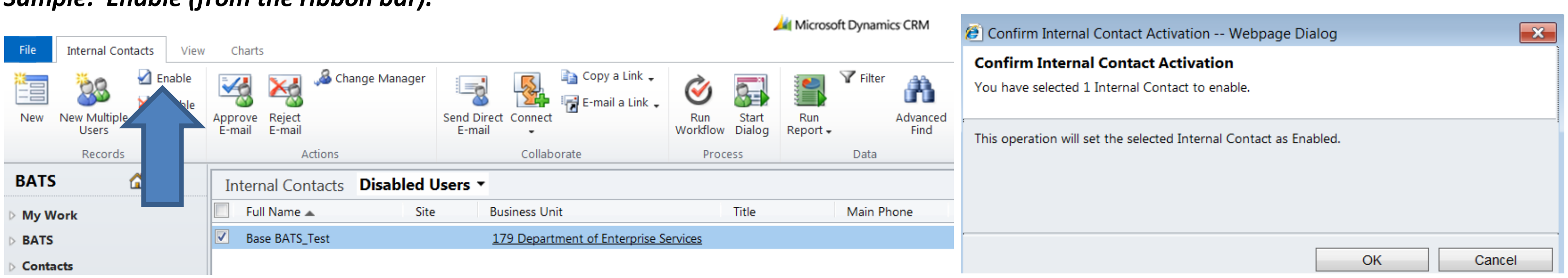
Internal contacts are linked to the agency administrator Business Unit.

To enable (activate) an internal contact:

1. **Select:** BATS tab (left-side navigation pane).
2. **Select:** Contacts (left-side navigation pane).
3. **Select:** Internal Contacts.
4. **Scroll**: To find the contact (use the dropdown list to change view if needed to narrow the list of users).
5. **Select**: Checkbox (next to contact name).
6. **Select**: Enable (from the ribbon bar).
7. **Select**: OK (in the Confirm Internal Contact Activation – Webpage Dialog box).

☑**Result**: Contact is enabled (activated). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Enable (from the ribbon bar).



Disable (Deactivate) Internal Contact

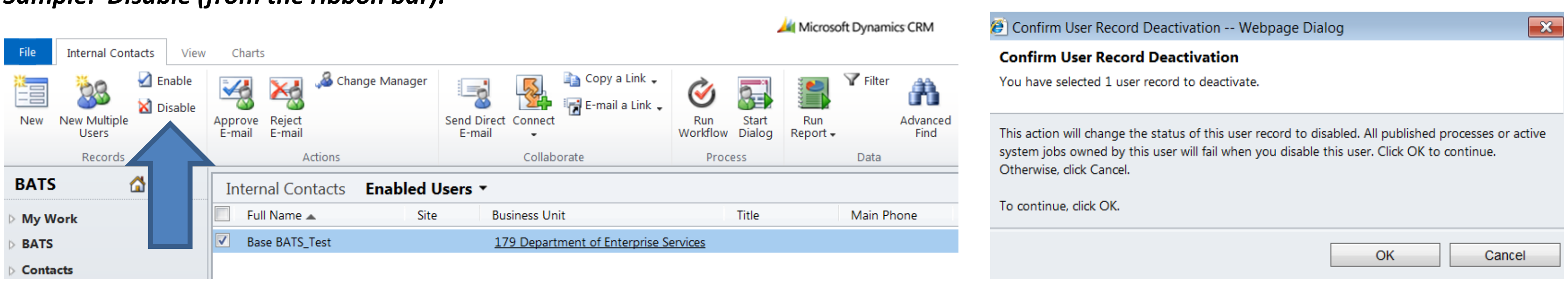
Internal contacts are linked to the agency administrator Business Unit. Internal contacts may be disabled (inactivated) but not deleted.

To disable (deactivate) an internal contact:

1. **Select:** BATS tab (left-side navigation pane).
2. **Select:** Contacts (left-side navigation pane).
3. **Select:** Internal Contacts.
4. **Select**: Checkbox (next to contact to be edited).
5. **Select**: Disable (from the ribbon bar).
6. **Select**: OK (in the Confirm User Record Deactivation – Webpage Dialog box).

☑**Result**: Contact is disabled (deactivated). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Disable (from the ribbon bar).



External Contacts:

BATS uses external contacts for bill-related processes but they are not linked to security functions.

- External contacts do not have ability to access specific functions and information within BATS (no userid).
- External contacts will include legislative sponsors. These sponsors will be updated (imported) from the Legislative Service Center (LSC) database and linked to an external contacts group available to all agencies.

The following information is required to manage external contacts.

Required Field*	Value	Additional Information
Last Name*	Last Name of external contact	BATS does not validate this information with the state Active Directory system.
Owner*	User Name of an agency user or agency administrator	Defaults to the User Name of the agency user or agency administrator who added the contact. ❖ This can be changed to another User Name if needed. For example, an agency administrator may add a contact and then change the Owner name to another agency user.

Add New External Contact

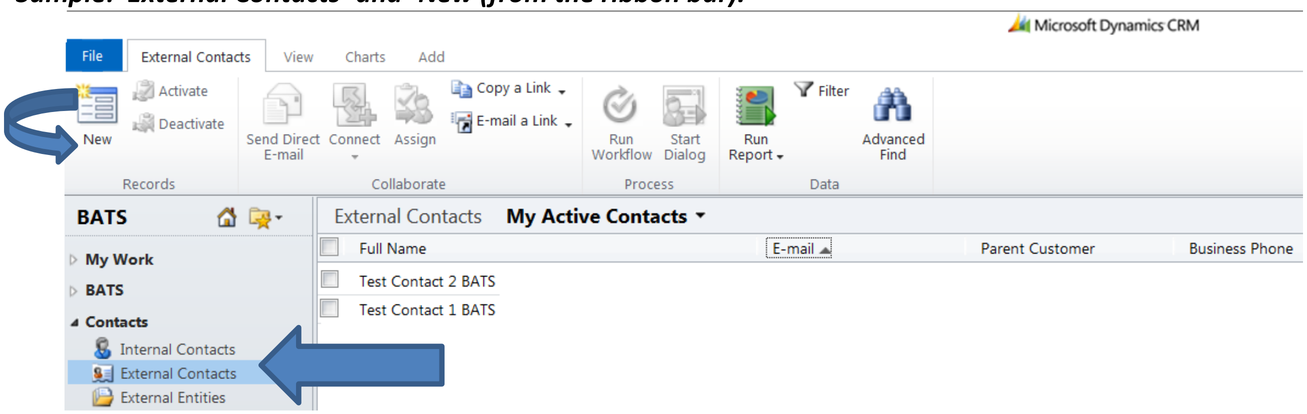
External contacts are linked to the 'owner' Business Unit.

To add a new external contact:

1. **Select:** BATS tab (left-side navigation pane).
2. **Select:** Contacts (left-side navigation pane).
3. **Select:** External Contacts.
4. **Select**: New (from the ribbon bar).
5. **Input:** Information about the new contact. Required fields are marked with *.
6. **Select:** Save.

☑**Result**: New contact is added. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: External Contacts -and- New (from the ribbon bar).



Edit (update) Information About an External Contact

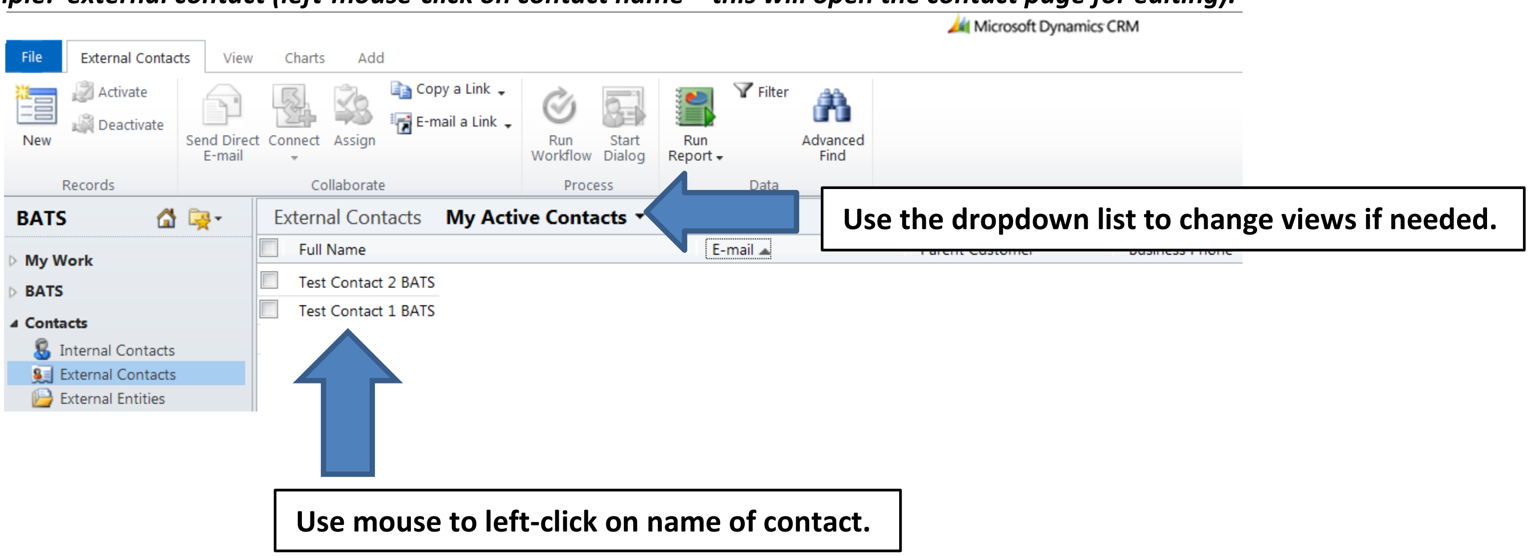
External contacts are linked to the 'owner' Business Unit.

To edit (update) external contact information:

1. **Select:** BATS tab (left-side navigation pane).
2. **Select:** Contacts (left-side navigation pane).
3. **Select:** External Contacts.
4. **Scroll**: To find the contact (use the dropdown list to change view if needed to narrow the list of contacts).
5. **Select**: Contact (left-mouse-click on the user name).
6. **Input:** Information about the contact.
7. **Select:** Save.

☑**Result**: Contact information is updated. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: external contact (left-mouse-click on contact name – this will open the contact page for editing).



Activate (Enable) External Contact

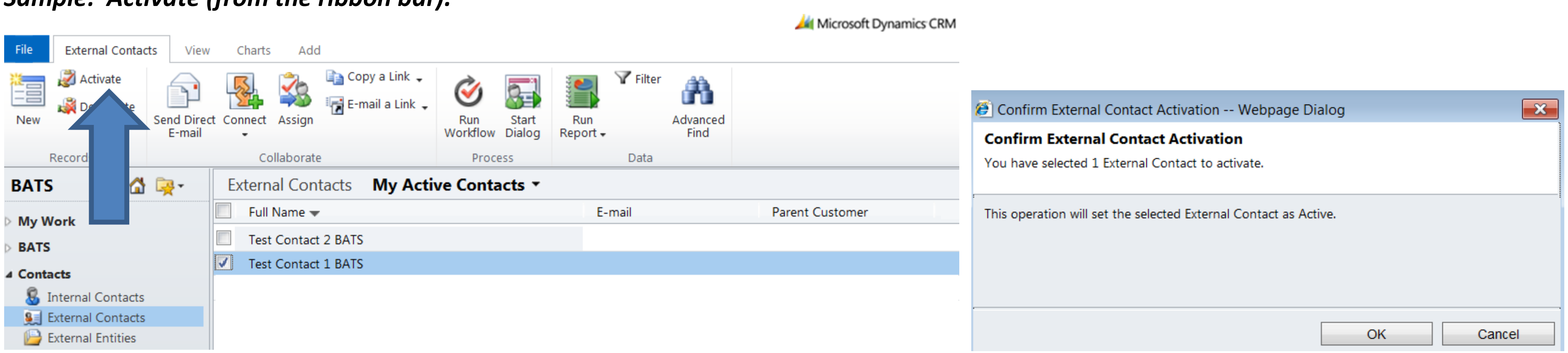
External contacts are linked to the 'owner' Business Unit.

To activate (enable) an external contact:

1. **Select:** BATS tab (left-side navigation pane).
2. **Select:** Contacts (left-side navigation pane).
3. **Select:** External Contacts.
4. **Scroll**: To find the contact (use the dropdown list to change view if needed to narrow the list of users).
5. **Select**: Checkbox (next to contact name).
6. **Select**: Activate (from the ribbon bar).
7. **Select**: OK (in the Confirm External Contact Activation – Webpage Dialog box).

☑**Result**: Contact is activated (enabled). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Activate (from the ribbon bar).



Deactivate (Disable) External Contact

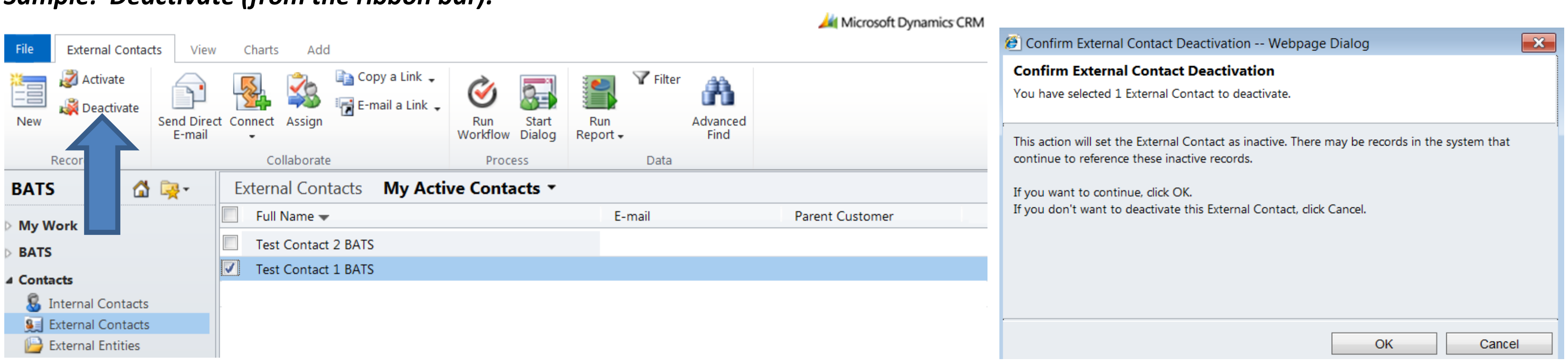
External contacts are linked to the ‘owner’ Business Unit.

To deactivate (disable) an external contact:

1. **Select:** BATS tab (left-side navigation pane).
2. **Select:** Contacts (left-side navigation pane).
3. **Select:** External Contacts.
4. **Scroll**: To find the contact (use the dropdown list to change view if needed to narrow the list of users).
5. **Select**: Checkbox (next to contact name).
6. **Select**: Deactivate (from the ribbon bar).
7. **Select**: OK (in the Confirm External Contact Deactivation – Webpage Dialog box).

☑**Result**: Contact is deactivated (disabled). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Deactivate (from the ribbon bar).



External Entities:

BATS uses external entities for bill-related processes but they are not linked to security functions.

❖ External entities do not have ability to access specific functions and information within BATS (no userid).

The following information is required to manage external entities.

Required Field*	Value	Additional Information
Last Name*	Last Name of external entity	BATS does not validate this information with the state Active Directory system.
Owner*	User Name of an agency user or agency administrator	Defaults to the User Name of the agency user or agency administrator who added the contact. ❖ This can be changed to another User Name if needed. For example, an agency administrator may add a contact and then change the Owner name to another agency user.

Add New External Entity

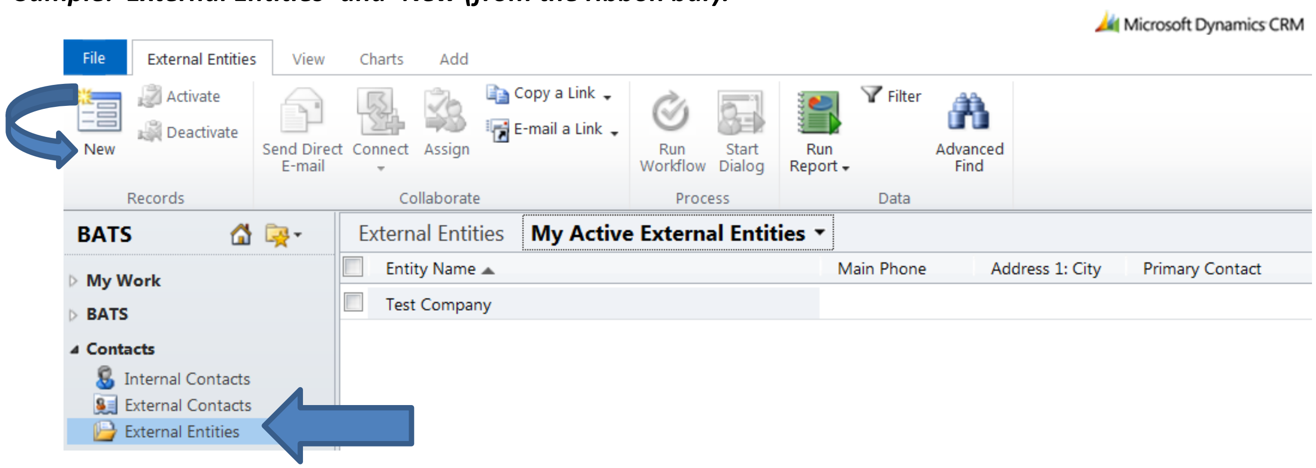
External entities are linked to the ‘owner’ Business Unit.

To add a new external entity:

1. **Select:** BATS tab (left-side navigation pane).
2. **Select:** Contacts (left-side navigation pane).
3. **Select:** External Entities.
4. **Select**: New (from the ribbon bar).
5. **Input:** Information about the new contact. Required fields are marked with *.
6. **Select:** Save.

☑**Result**: New contact is added. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: External Entities -and- New (from the ribbon bar).



Edit (update) Information About an External Entity

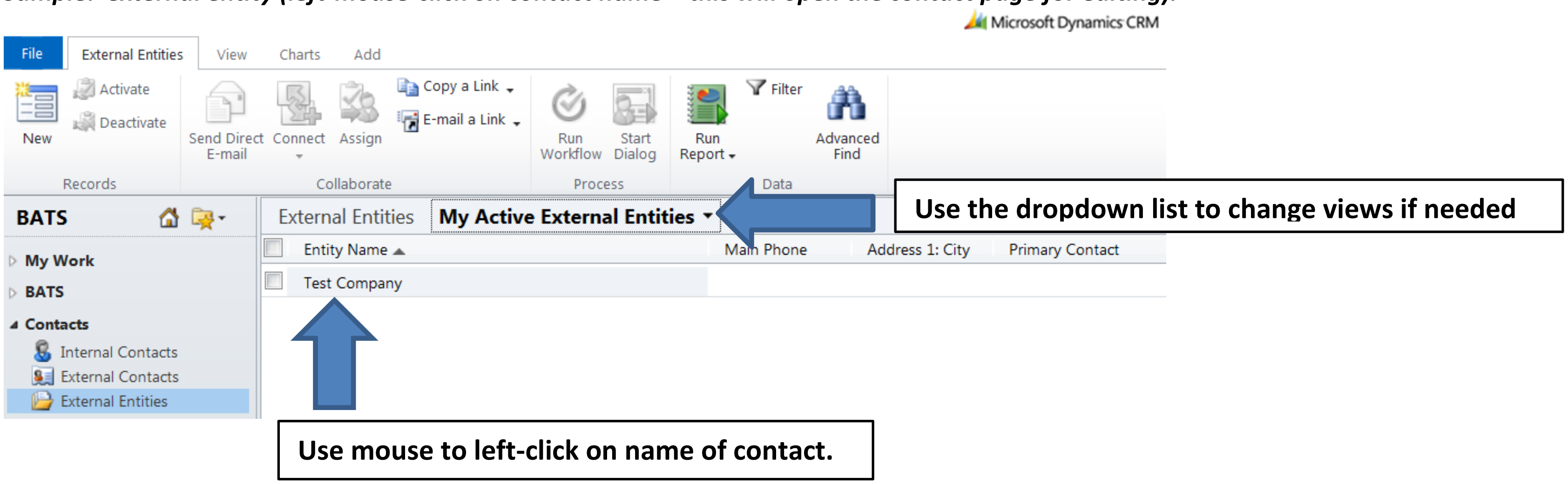
External entities are linked to the 'owner' Business Unit.

To edit (update) external entity information:

1. **Select:** BATS tab (left-side navigation pane).
2. **Select:** Contacts (left-side navigation pane).
3. **Select:** External Entities.
4. **Scroll**: To find the contact (use the dropdown list to change view if needed to narrow the list of contacts).
5. **Select**: External entity (left-mouse-click on the user name).
6. **Input:** Information about the contact.
7. **Select:** Save.

☑**Result**: Contact information is updated. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: external entity (left-mouse-click on contact name – this will open the contact page for editing).



Activate (Enable) External Entity

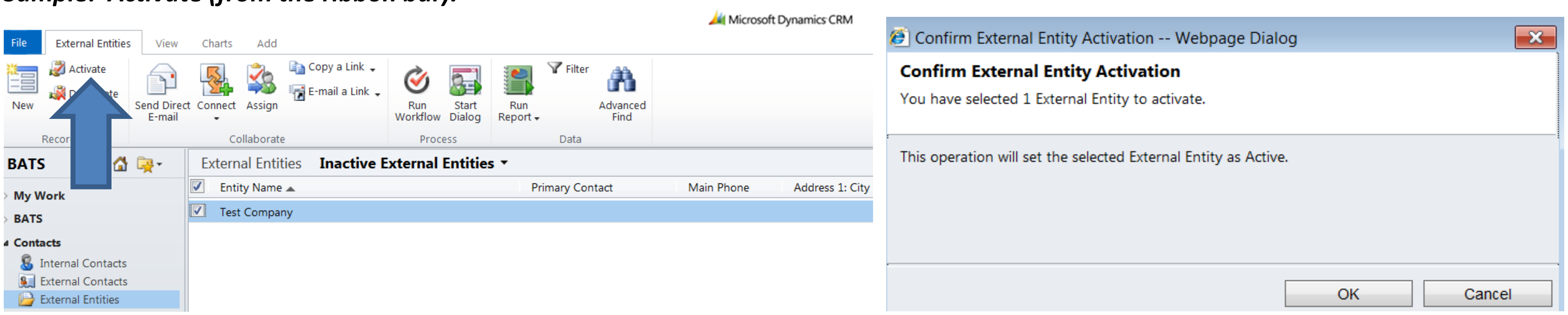
External entities are linked to the 'owner' Business Unit.

To activate (enable) an external entity:

1. **Select:** BATS tab (left-side navigation pane).
2. **Select:** Contacts (left-side navigation pane).
3. **Select:** External Entity.
4. **Scroll**: To find the contact (use the dropdown list to change view if needed to narrow the list of users).
5. **Select**: Checkbox (next to contact name).
6. **Select**: Activate (from the ribbon bar).
7. **Select**: OK (in the Confirm External Entity Activation – Webpage Dialog box).

☑**Result**: Contact is activated (enabled). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Activate (from the ribbon bar).



Deactivate (Disable) External Entity

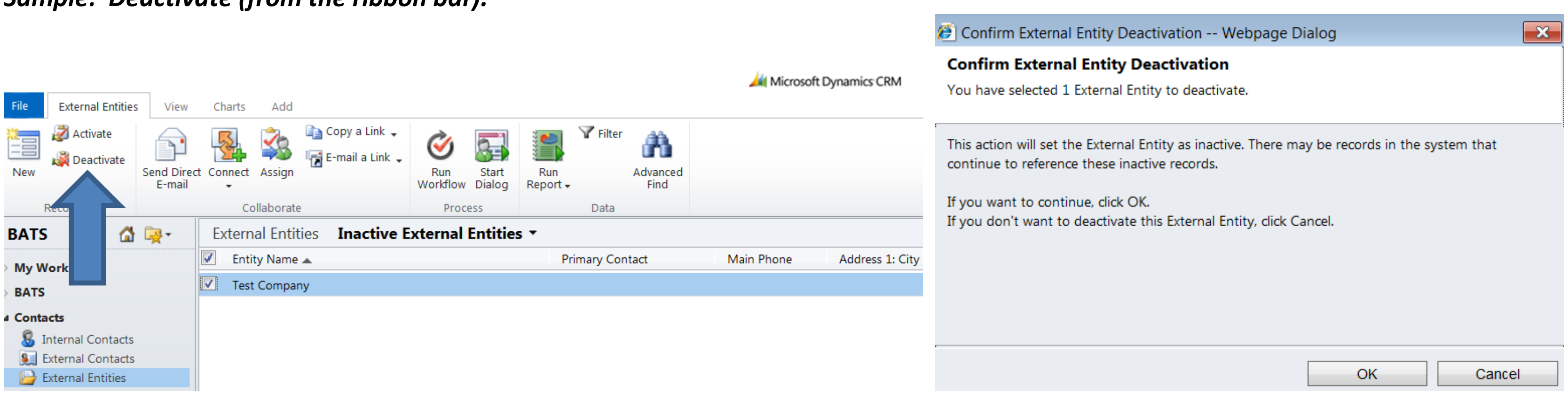
External entities are linked to the 'owner' Business Unit.

To deactivate (disable) an external entity:

1. **Select:** BATS tab (left-side navigation pane).
2. **Select:** Contacts (left-side navigation pane).
3. **Select:** External Entities.
4. **Scroll**: To find the contact (use the dropdown list to change view if needed to narrow the list of users).
5. **Select**: Checkbox (next to contact name).
6. **Select**: Deactivate (from the Records group on the ribbon bar).
7. **Select**: OK (in the Confirm External Entity Deactivation – Webpage Dialog box).

☑**Result**: Contact is deactivated (disabled). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Deactivate (from the ribbon bar).



The Bill Analysis and Tracking System (BATS) includes security protocols to ensure that individual agencies own and control access to their information.

- Access to specific functions within BATS is controlled by user roles and/or team assignments.
- Access to specific agency information within BATS is controlled by links to the Business Unit (agency) associated with a user. The link to the Business Unit (agency) provides access to specific information within BATS.

This document will provide an overview of user roles and basic security functions, including:

- User Roles.
- Access the security administration functions.
- View (display) roles assigned to a user.
- Add new user.
- Add (assign) role to user.
- "You need to assign security roles to new users" message.
- Add (join) team assignments.
- Remove role from user.
- Disable (Deactivate) user.
- Enable (Activate) user.

User Roles

Agency and executive administrators will assign one or more roles to a user to provide access to specific functions within BATS.

- BATS roles are additive. All users will need to be assigned to a 'base' role which will provide basic functions. Some users will have one or two additional roles assigned to them and some users will have multiple roles assigned to them.

Quick Reference: BATS User Roles.

Agency User Roles & Security	BATS Agency User (base)	BATS Agency Analyst (additive)	BATS Agency Reviewer (additive)	BATS Agency Coordinator (additive)	BATS Agency Administrator (additive)	BATS Tracking User (additive)	BATS Team Tracking User (additive)
Agency Users	Yes	No	No	No	No	Yes	No
Agency Analyst	Yes	Yes	No	No	No	Yes	No
Agency Reviewer	Yes	Yes	Yes	No	No	Yes	No
Agency Coordinator	Yes	Yes	Yes	Yes	No	Yes	Yes
Agency Administrator	Yes	Yes	Yes	Yes	Yes	Yes	Yes

OFM/GOV User Roles & Security	BATS Executive Analyst (base)	BATS Executive Reviewer (additive)	BATS Executive Operations (additive)	BATS Executive Administrator (additive)	BATS Governor's Executive Policy (additive)	BATS Tracking User (additive)	BATS Team Tracking User (additive)
Oversight Analyst	Yes	No	No	No	No	Yes	No
Oversight Reviewer	Yes	Yes	No	No	No	Yes	No
Oversight Coordinator	Yes	Yes	Yes	No	No	Yes	Yes
Oversight Administrator	Yes	Yes	Yes	Yes	No	Yes	Yes
Oversight Governor's Office	Yes	Yes	Yes	Yes	Yes	Yes	Yes

User Roles (continued)

Agency and executive administrators will assign one or more roles to a user to provide access to specific functions within BATS.

BATS Role Name	Assign To	Description
Agency Role	**Agencies**	**Agency Request Legislation and Bill Tracking**
BATS Agency User (base)	❖ Agency User	Basic (base) role assigned to all agency users. ❖ Create activities. ❖ Read (display) agency requests and/or bill-related records.
BATS Agency Analyst (additive)	❖ Agency Analyst ❖ Agency Reviewer ❖ Agency Coordinator ❖ Agency Administrator	Additional role assigned to agency analysts. ❖ Input, edit, and format analysis information. ❖ Set analysis to 'ready for review'. ❖ Attach documents to agency request, analysis, and/or bill. ❖ Create external contacts and external entities. ❖ Create connection for contacts to agency request and/or bill (connect contacts). ❖ Create connection for related bill to existing bill (connect bills). ❖ Send email links for agency request, analysis, and/or bill.
BATS Agency Reviewer (additive)	❖ Agency Reviewer ❖ Agency Coordinator ❖ Agency Administrator	Additional role assigned to agency reviewers. ❖ Review, edit, and format analysis information. ❖ Set task to 'complete' (mark task complete).

User Roles (continued)

Agency and executive administrators will assign one or more roles to a user to provide access to specific functions within BATS.

BATS Role Name	Assign To	Description
Agency Role	**Agencies**	**Agency Request Legislation and Bill Tracking**
BATS Agency Coordinator (additive)	❖ Agency Coordinator ❖ Agency Administrator	Additional role assigned to agency coordinators. ❖ Create agency request. ❖ Create analysis for agency request and/or bill. ❖ Create assignments for analysis (assign analyst and/or reviewer). ❖ Complete agency request (input AAG contact, Final Z-Draft). ❖ Complete analysis and/or review. ❖ Set assignments to 'complete' (mark assignments complete). ❖ Submit agency request to OFM. ❖ Withdraw agency request from OFM. ❖ Assign Queue items and activities to internal contacts. ❖ Assign primary contact to agency request. ❖ Assign program to agency request, analysis, and/or bill. ❖ Assign division to analysis. ❖ Assign classification to bill.
BATS Agency Administrator (additive)	❖ Agency Administrator	Additional role assigned to agency administrators. ❖ Create internal contacts (add users). ❖ Assign security roles and teams to internal contacts. ❖ Create teams. ❖ Create programs, divisions, classifications. ❖ Assign classification to bill. ❖ Update 'program required' checkbox on Business Units.

User Roles (continued)

Agency and executive administrators will assign one or more roles to a user to provide access to specific functions within BATS.

BATS Role Name	Assign To	Description
Executive Oversight Role	**OFM and/or GOV Oversight**	**Agency Request Legislation and Bill Tracking**
BATS Executive Analyst (base)	❖ Oversight Analyst ❖ Oversight Reviewer ❖ Oversight Coordinator ❖ Oversight Administrator ❖ Oversight Gov's Office	Basic (base) role assigned to all executive/oversight users. ❖ Create activities. ❖ Read (display) agency requests and/or bill-related records. ❖ Input, edit, and format analysis information. ❖ Create assignments for analysis (assign analyst and/or reviewer). ❖ Set analysis to 'ready for review'. ❖ Attach documents to agency request, analysis, and/or bill. ❖ Create external contacts and external entities. ❖ Create connection for contacts to agency request and/or bill (connect contacts). ❖ Create connection for related bill to existing bill (connect bills). ❖ Send email links for agency request, analysis, and/or bill. ❖ Review Governor's Decision on agency request.
BATS Executive Reviewer (additive)	❖ Oversight Reviewer ❖ Oversight Coordinator ❖ Oversight Administrator ❖ Oversight Gov's Office	Additional role assigned to executive/oversight reviewers. ❖ Review, edit, and format analysis information. ❖ Set task to 'complete' (mark task complete).

User Roles (continued)

Agency and executive administrators will assign one or more roles to a user to provide access to specific functions within BATS.

BATS Role Name	Assign To	Description
Executive Oversight Role	**OFM and/or GOV Oversight**	**Agency Request Legislation and Bill Tracking**
BATS Executive Operations (additive)	❖ Oversight Coordinator ❖ Oversight Administrator ❖ Oversight Gov's Office	Additional role assigned to executive/oversight coordinators and administrators). ❖ Create agency request and input primary contact. ❖ Create analysis for agency request and/or bill. ❖ Create assignments for analysis (assign analyst and/or reviewer). ❖ Complete analysis and/or review. ❖ Set assignments to 'complete' (mark assignments complete). ❖ Input OFM status and recommendations on agency request. ❖ Return agency request to an agency. ❖ Submit agency request to GOV. ❖ Assign Queue items and activities to internal contacts. ❖ Assign division to analysis. ❖ Assign classification to bill.
BATS Executive Administrator (additive)	❖ Oversight Administrator ❖ Oversight Gov's Office	Additional role assigned to executive/oversight administrators. ❖ Create internal contacts (add users). ❖ Assign security roles and teams to internal contacts. ❖ Create teams. ❖ Create programs, divisions, and classifications. ❖ Assign classification to bill.

User Roles (continued)

Agency and executive administrators will assign one or more roles to a user to provide access to specific functions within BATS.

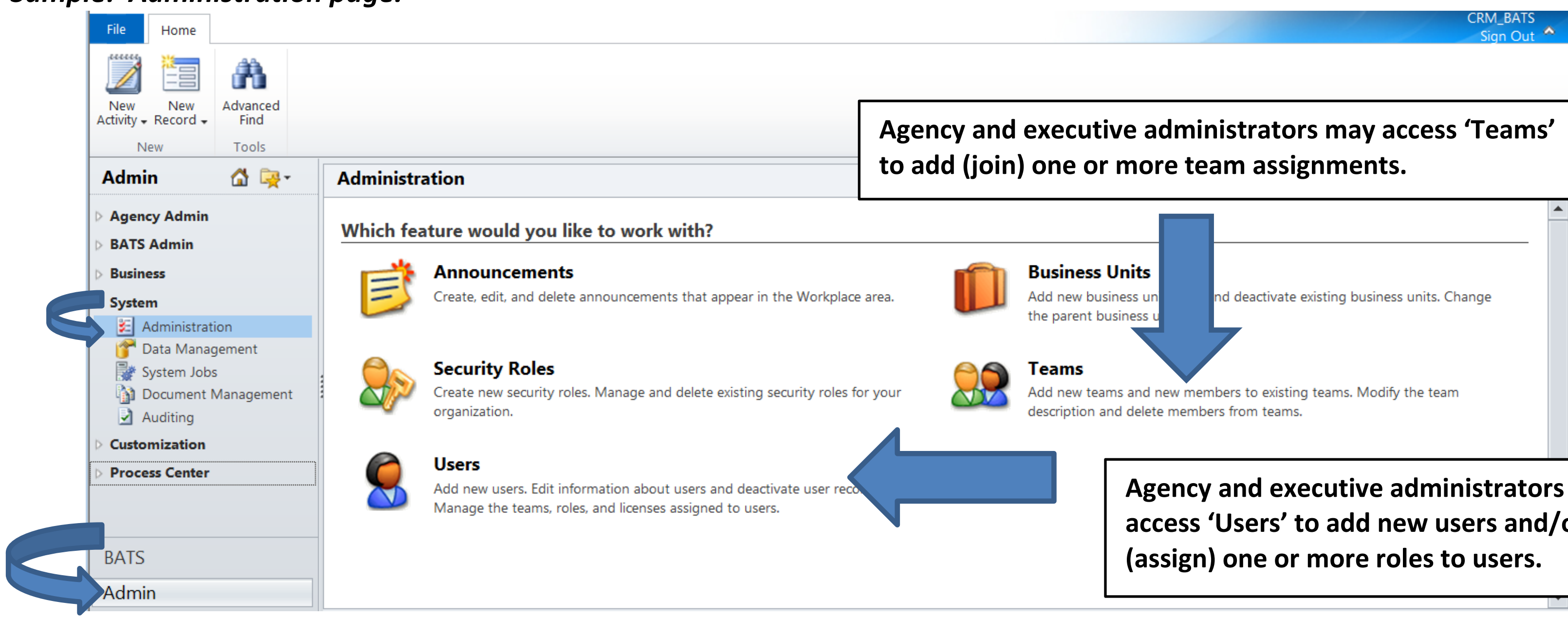
BATS Role Name	Assign To	Description
Executive Oversight Role	**GOV Oversight**	**Agency Request Legislation and Bill Tracking**
BATS Governor's Executive Policy (additive)	❖ Oversight Gov's Office	Additional role assigned to executive/oversight policy users. ❖ Return agency request to OFM. ❖ Input Governor's Decision on agency request. ❖ Set decision status on agency request (complete agency request with final status).
Bill Tracking Role	**Agencies and OFM/GOV**	**Bill Tracking**
BATS Tracking User (additive)	❖ Agency Analyst ❖ Agency Reviewer ❖ Agency Coordinator ❖ Agency Administrator ❖ Oversight Analyst ❖ Oversight Reviewer ❖ Oversight Coordinator ❖ Oversight Administrator ❖ Oversight Gov's Office	Additional role assigned to users who will track bills. ❖ Track bills for user. ❖ Receive email update (hourly and/or daily) for tracked bills.
BATS Team Tracking User (additive)	❖ Agency Coordinator ❖ Agency Administrator ❖ Oversight Coordinator ❖ Oversight Administrator ❖ Oversight Gov's Office	Additional role assigned to users who will input/maintain agency bill tracking analysis. ❖ Create tracking for agency, division, and/or team. ❖ Create assignments for tracking.

Access Security Settings (System Administration)
Security settings are available from the Admin tab in the left side navigation pane.

To access the security settings:
1. **Select:** Admin tab (left side navigation pane).
2. **Select:** System (left side navigation pane).
3. **Select:** Administration (left side navigation pane).

☑**Result**: Administration page opens. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Administration page.



Agency and executive administrators may access 'Teams' to add (join) one or more team assignments.

Agency and executive administrators may access 'Users' to add new users and/or add (assign) one or more roles to users.

In this sample, the Admin tab was selected (left-side navigation pane).

Add New User

The following information is required to add a new user (internal contact).

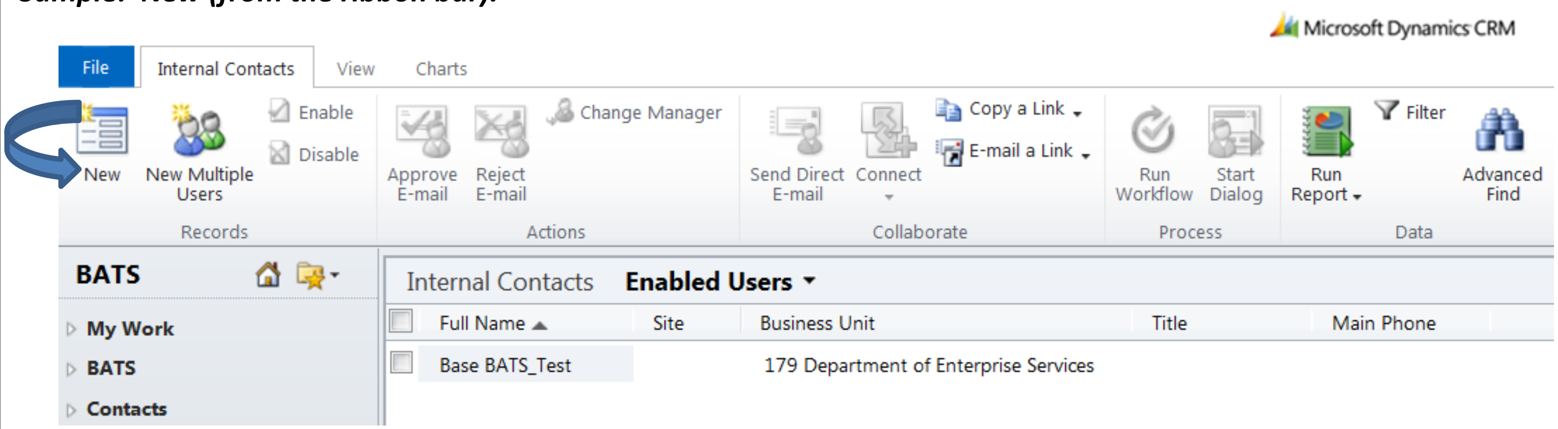
Required Field*	Value	Additional Information
User Name*	NetworkLogonID –or- Domain\NetworkLogonID ❖ Example: BaseBATSTest. ❖ Example: OFM\BaseBATSTest. Note: Secure Access Washington (SAW) user name is the email that is registered with SAW account. ❖ Example: username@emailDomain.gov.	BATS validates this information with the state Active Directory system. ❖ Other fields on the page will be populated with default values based on the NetworkLogonID. Note: Secure Access Washington (SAW) user name is not validated against the state Active Directory system so other fields on the page will not be populated with default values.
First Name*	First Name of new user	BATS will automatically populate this value from the state Active Directory system if a valid Domain\NetworkLogonID –or- NetworkLogonID is input in the User Name field.
Last Name*	Last Name of new user	BATS will automatically populate this value from the state Active Directory system if a valid Domain\NetworkLogonID –or- NetworkLogonID is input in the User Name field.
Business Unit*	Agency Business Unit	The default value is same as the Business Unit (agency) assigned to the Agency Administrator.
E-mail access type – Incoming* Outgoing*	Microsoft Dynamics CRM for Outlook	The default value is Microsoft Dynamics CRM for Outlook. ❖ Do not change this value.
Access Mode*	Read-Write	The default value is Read-Write. ❖ Do not change this value.
License Type*	Full	The default value is Full. ❖ Do not change this value.

Add New User (continued)
New users will be added as an Internal Contact.

To add a new user as an Internal Contact from the Administration page (Admin Tab/System/Administration):
1. **Select:** Users (from the Administration page).
2. **Select:** New (from the ribbon bar).
3. **Input:** Information about the new user (internal contact). Required fields are marked with *. Note: Information about adding an internal contact is included in the user reference materials for Contacts.
4. **Select:** Save.

☑**Result**: New user (internal contact) is added. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: New (from the ribbon bar).

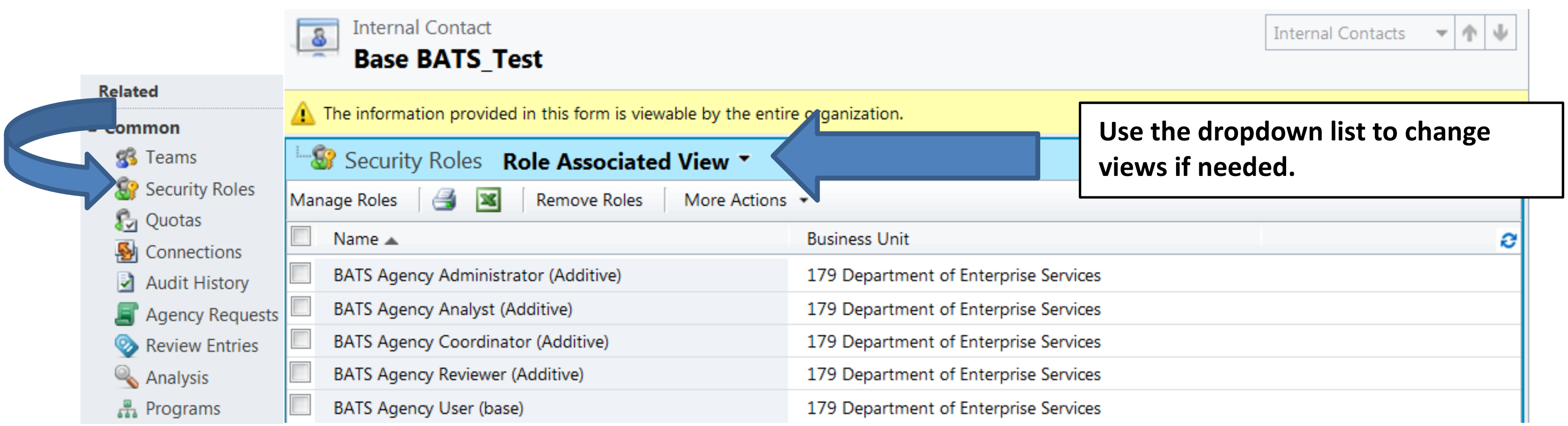


View (Display) Roles Assigned to a User
Agency and executive administrators may view (display) information about a user, including the role(s) assigned to a user.

To view (display) roles assigned to a user from the Administration page (Admin Tab/System/Administration):
1. **Select:** Users (from the Administration page).
2. **Scroll**: To find the user.
3. **Select**: User (left-mouse-click on the user name).
4. **Select**: Security Roles (left side navigation pane under Common).

☑**Result**: Roles assigned to the user are displayed. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Security Roles (left side navigation pane under Common) –and- results.



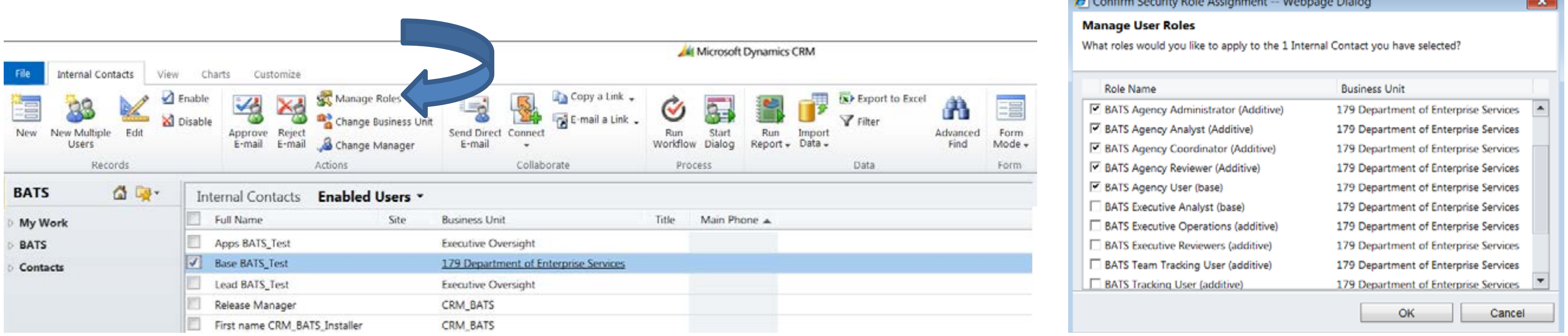
Add (Assign) Role to User
One or more roles may be added to a user.

To add (assign) a role to a user from the Administration page (Admin Tab/System/Administration):

1. **Select:** Users (from the Administration page).
2. **Scroll**: To find the user.
3. **Select**: Checkbox (next to user name).
4. **Select**: Manage Roles (from the ribbon bar).
5. **Scroll**: To find the Role.
6. **Select**: Checkbox (next to role to be added). Note: select more than one checkbox if needed.
7. **Select**: OK (in the Confirm Security Role Assignment – Webpage Dialog box).

☑**Result**: Role is added to the user. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Checkbox (next to user name) and Manage Roles.



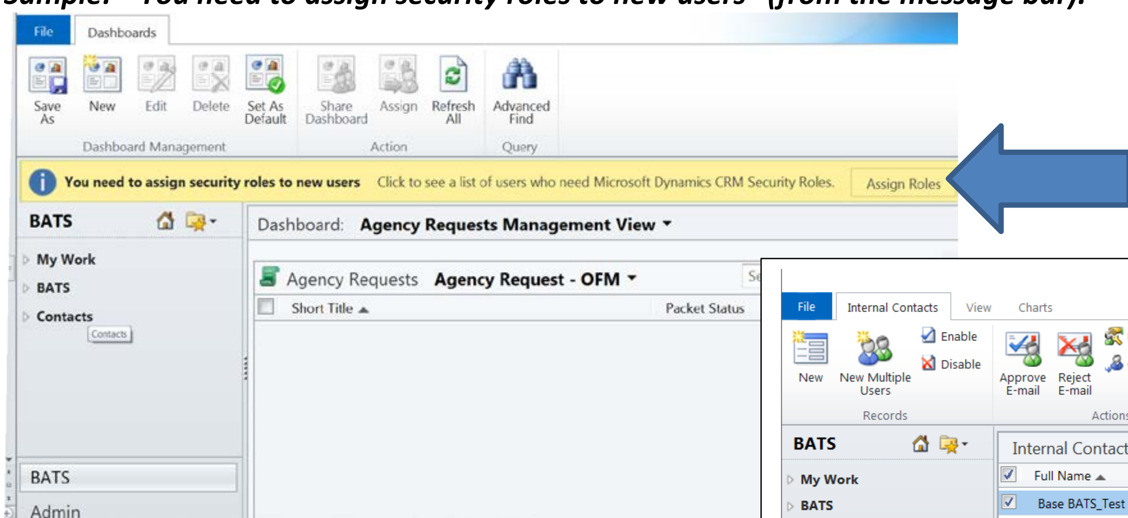
"You need to assign security roles to new users" Message

BATS will display this message if a user does not have any roles assigned.

To add (assign) a role to a user from the "You need to assign security roles to new users" message:

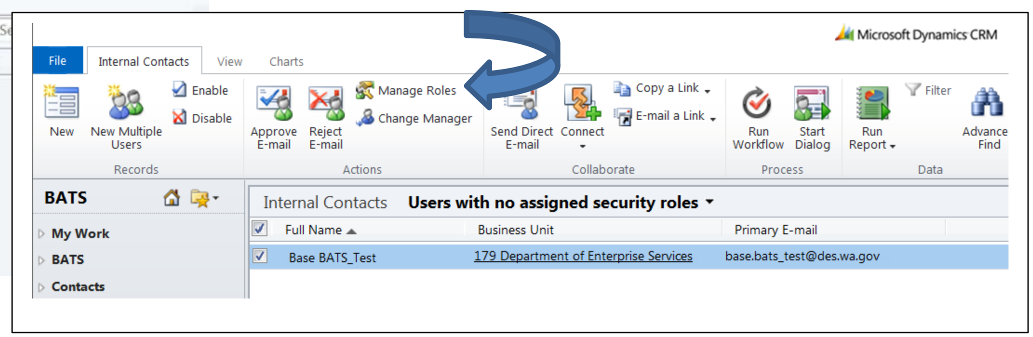
1. **Select**: Assign Roles (from the message bar).
2. **Scroll**: To find the user.
3. **Select**: Checkbox (next to user name).
4. **Select**: Manage Roles (from the ribbon bar).
5. **Scroll**: To find the Role.
6. **Select**: Checkbox (next to role to be added). Note: select more than one checkbox if needed.
7. **Select**: OK (in the Confirm Security Role Assignment – Webpage Dialog box).
8. ☑**Result**: Role is added to the user. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: "You need to assign security roles to new users" (from the message bar).



BATS will display the message if a user does not have any roles assigned.

- **When 'Assign Roles' is selected, a list of users with no assigned security roles is displayed.**



Add (Join) Team Assignments

Access to specific functions within BATS is controlled by user roles and/or team assignments.

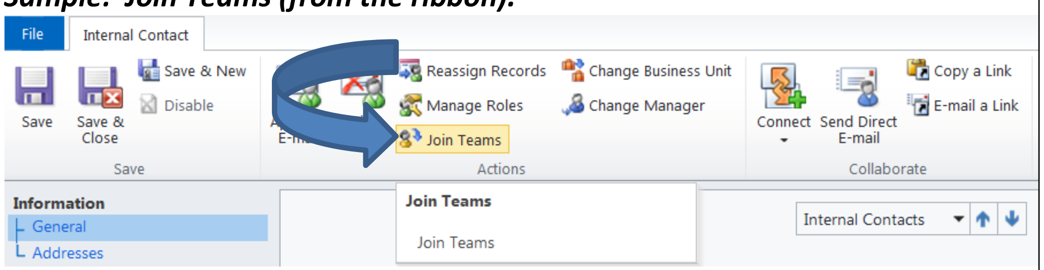
Add (join) this team	For users with this role	Team assignment needed so that …
Analysis Assignment Update	❖ BATS Agency Administrator. ❖ BATS Agency Coordinator. ❖ BATS Executive Analyst. ❖ BATS Executive Reviewer. ❖ BATS Executive Operations. ❖ BATS Executive Administrator. ❖ BATS Governor's Executive Policy.	Preparer and Reviewer assignments may be updated.
OFM Agency Request	❖ BATS Executive Analyst. ❖ BATS Executive Reviewer. ❖ BATS Executive Operations. ❖ BATS Executive Administrator. ❖ BATS Governor's Executive Policy.	Items in the system generated oversight queues will be available.
GOV's Office Agency Request	❖ BATS Executive Analyst. ❖ BATS Executive Reviewer. ❖ BATS Executive Operations. ❖ BATS Executive Administrator. ❖ BATS Governor's Executive Policy.	Items in the system generated oversight queues will be available.

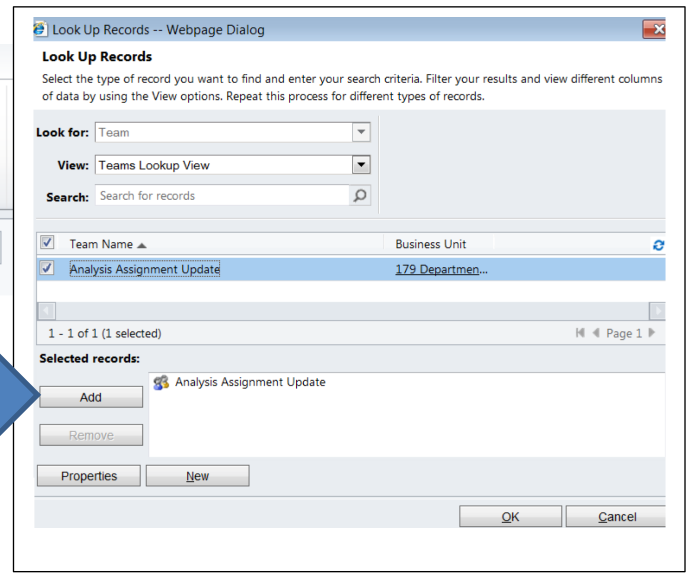
Add (Join) 'Analysis Assignment Update' Team
The 'Analysis Assignment Update' team needs to be added (joined) for some users so that assignments may be updated during the agency request and oversight processes.

To add (join) the Analysis Assignment team to a user from the Administration page (Admin Tab/System/Administration):
1. **Select:** Users (from the Administration page).
2. **Scroll**: To find the user.
3. **Select**: User (left-mouse-click on the user name).
4. **Select**: Join Teams (from the ribbon bar). The system will display Look Up Records - Webpage Dialog.
5. **Select**: Checkbox next to 'Analysis Assignment Update' team.
6. **Select**: Add (under Selected records in the Webpage Dialog box).
7. **Select**: Ok (in the Webpage Dialog box).

☑**Result**: Analysis Assignment Update team added (joined) to the user. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Join Teams (from the ribbon).





In this sample, Join Teams was selected from the ribbon bar.
- ❖ **Look Up was used to find, select, and add 'Analysis Assignment Update' team.**

Add (Join) 'OFM Agency Request' Team

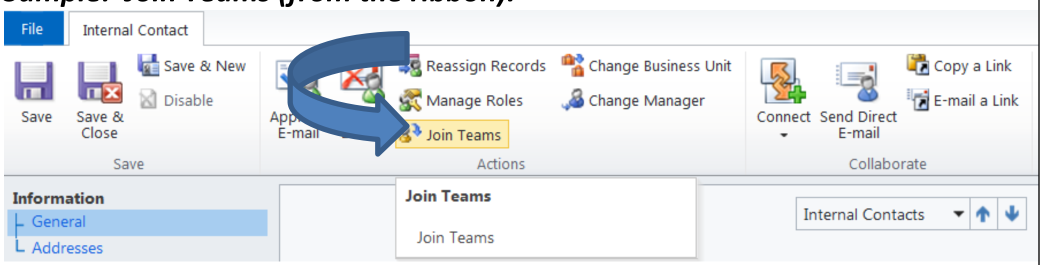
The 'OFM Agency Request' team needs to be added (joined) for some users so that items in the system generated oversight queues will be available.

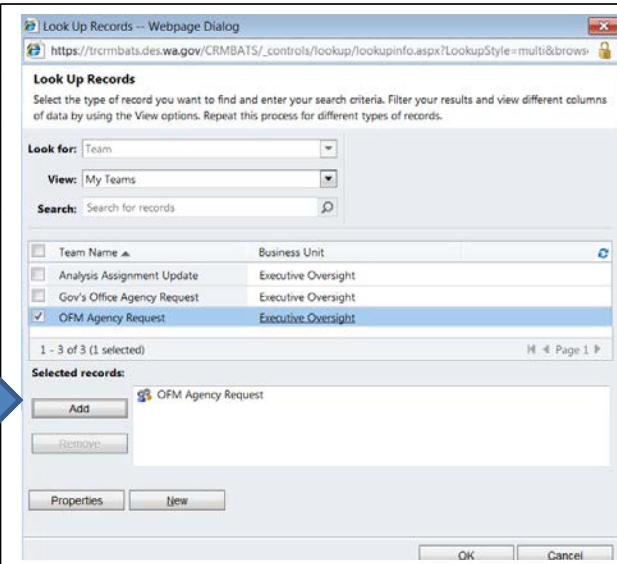
To add (join) the OFM Agency Request team to a user from the Administration page (Admin Tab/System/Administration):

1. **Select:** Users (from the Administration page).
2. **Scroll**: To find the user.
3. **Select**: User (left-mouse-click on the user name).
4. **Select**: Join Teams (from the ribbon bar). The system will display Look Up Records - Webpage Dialog.
5. **Select**: Checkbox (next to 'OFM Agency Request' team).
6. **Select**: Add (under Selected records in the Webpage Dialog box).
7. **Select**: Ok (in the Webpage Dialog box).

☑**Result**: OFM Agency Request added (joined) to the user. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Join Teams (from the ribbon).





In this sample, Join Teams was selected from the ribbon bar.

- ❖ **Look Up was used to find, select, and add 'OFM Agency Request' team.**

Add (Join) 'Gov's Office Agency Request' Team

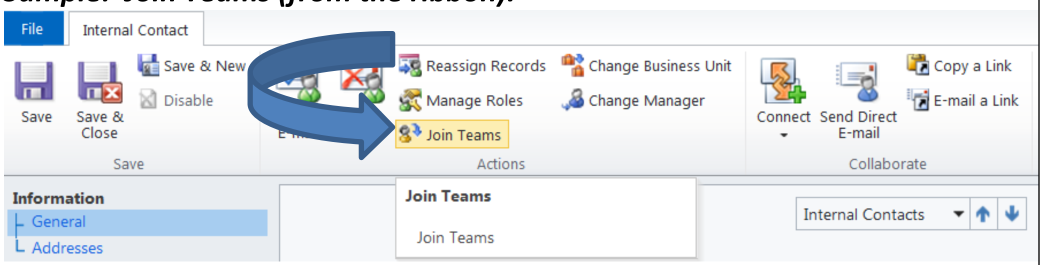
The 'Gov's Office Agency Request' team needs to be added (joined) for some users so that items in the system generated oversight queues will be available.

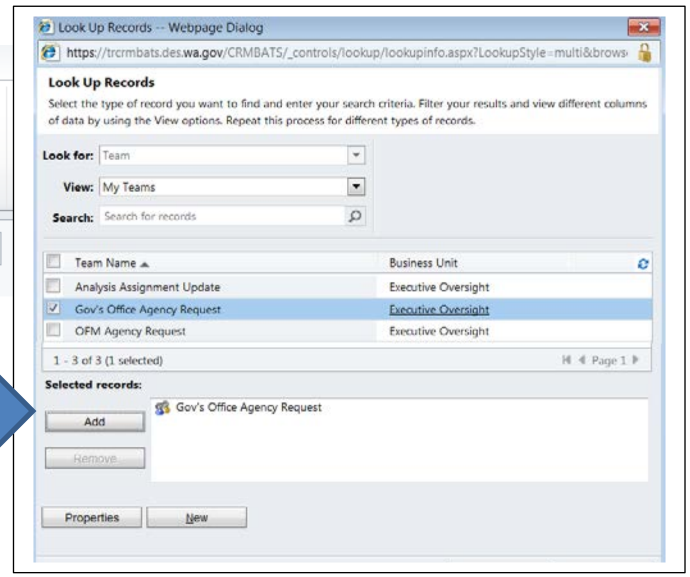
To add (join) the Gov's Office Agency Request team to a user from the Administration page (Admin Tab/System/Administration):

1. **Select:** Users (from the Administration page).
2. **Scroll**: To find the user.
3. **Select**: User (left-mouse-click on the user name).
4. **Select**: Join Teams (from the ribbon bar). The system will display Look Up Records - Webpage Dialog.
5. **Select**: Checkbox (next to 'Gov's Office Agency Request' team).
6. **Select**: Add (under Selected records in the Webpage Dialog box).
7. **Select**: Ok (in the Webpage Dialog box).

☑**Result**: Gov's Office Agency Request added (joined) to the user. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Join Teams (from the ribbon).





In this sample, Join Teams was selected from the ribbon bar.

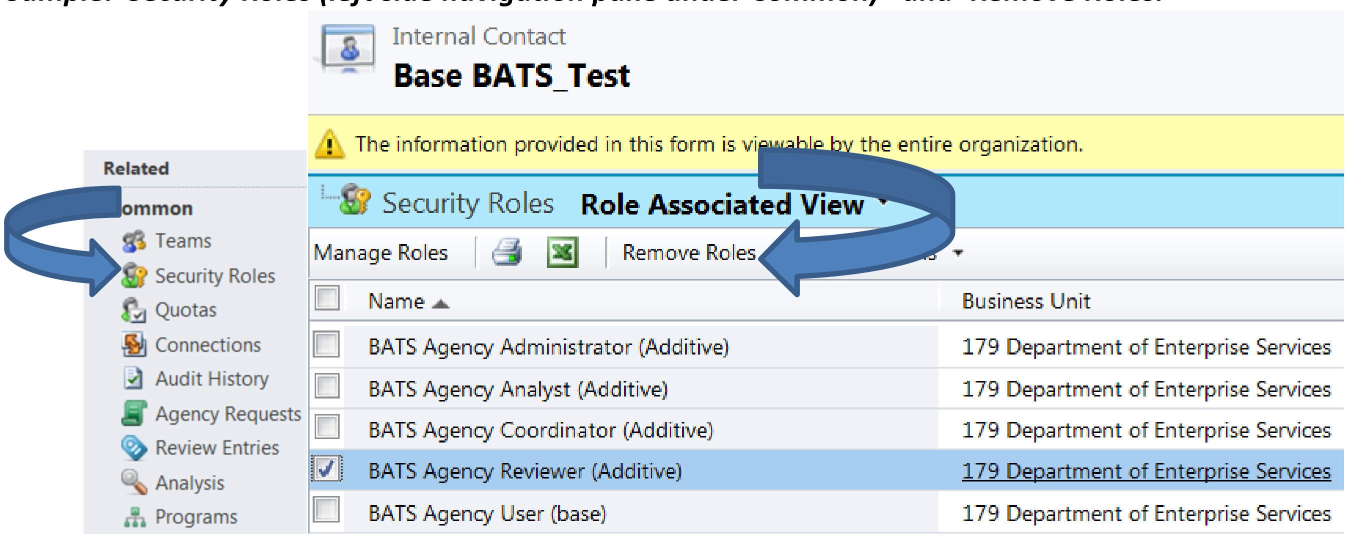
- **Look Up was used to find, select, and add 'Gov's Office Agency Request' team.**

Remove Role From User
One or more roles may be removed from a user.

To remove a role from a user from the Administration page (Admin Tab/System/Administration):
1. **Select:** Users (from the Administration page).
2. **Scroll**: To find the user.
3. **Select**: User (left-mouse-click on the user name).
4. **Select**: Security Roles (left side navigation pane under Common).
5. **Scroll**: To find the Role.
6. **Select**: Checkbox (next to role). Note: select more than one checkbox if needed.
7. **Select**: Remove Roles.

☑**Result**: Role is removed from the user. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Security Roles (left side navigation pane under Common) –and- Remove Roles.



Disable (Deactivate) a User

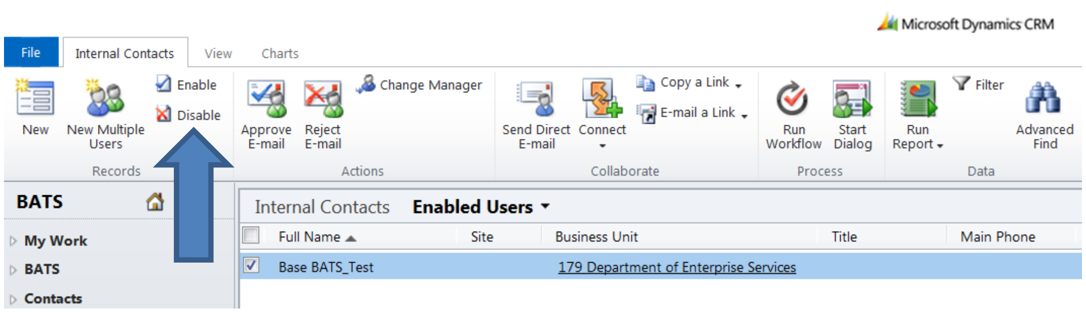
Agency and executive administrators may disable (inactivate) a user but cannot delete a user.

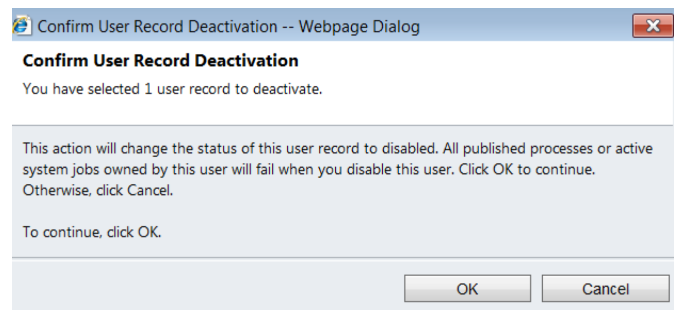
To disable (deactivate) a user from the Administration page (Admin Tab/System/Administration):

1. **Select:** Users (from the Administration page).
2. **Scroll**: To find the user (use the dropdown list to change views if needed to narrow the list of users).
3. **Select**: Checkbox (next to user name).
4. **Select**: Disable (from the on the ribbon bar).
5. **Select**: OK (in the Confirm User Record Deactivation – Webpage Dialog box).

☑**Result**: User is disabled (deactivated). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Disable (from the ribbon bar) -and- OK.





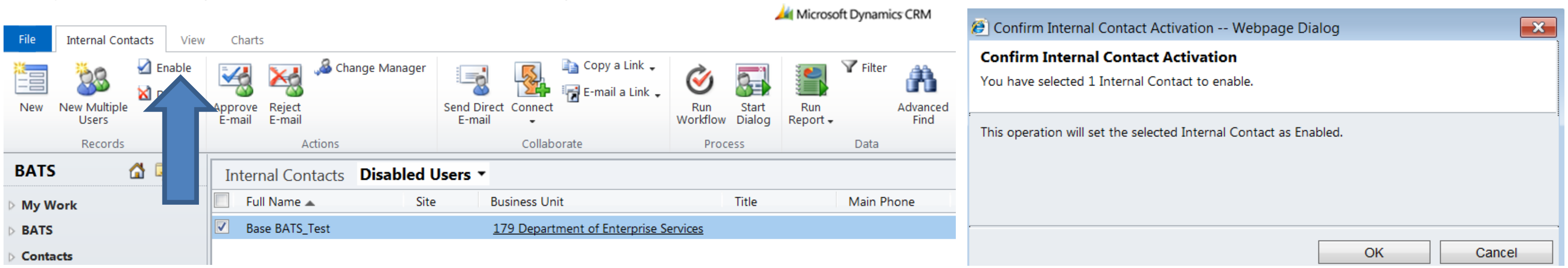
Enable (Activate) a User
Agency and executive administrators may enable (activate) a user that has been disabled (deactivated).

To enable (activate) a user from the Administration page:

1. **Select:** Users.
2. **Scroll**: To find the user (use the dropdown list to change views if needed to narrow the list of users).
3. **Select**: Checkbox (next to user name).
4. **Select**: Enable (from the ribbon bar).
5. **Select**: OK (in the Confirm User Record Activation – Webpage Dialog box).

☑**Result**: User is enabled (activated). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Enable (from the ribbon bar) -and- Confirm User Record Activation.



The Bill Analysis and Tracking System (BATS) provides the ability to setup values for programs, divisions, and classifications that may be associated with bill-related information.

- Programs, divisions, and classifications are added and maintained by agency administrators.

Type	Description
Program	Identifies specific program that may be associated with bill-related information. ❖ Linked to agency administrator Business Unit. ❖ May be used as a 'template' to identify reviewers. ❖ May be used as a 'template' to identify division related to program.
Division	Identifies specific division that may be associated with bill-related information. ❖ Linked to agency administrator Business Unit. ❖ May be used to identify a division related to a program.
Classification	Identifies specific classification that may be associated with bill-related information. ❖ Linked to agency administrator Business Unit. ❖ May be used to track bill-related status and information.

This document will provide an overview of programs, divisions, and classification, including:

- Manage Programs.
- Manage Divisions.
- Manage Classifications.

Programs

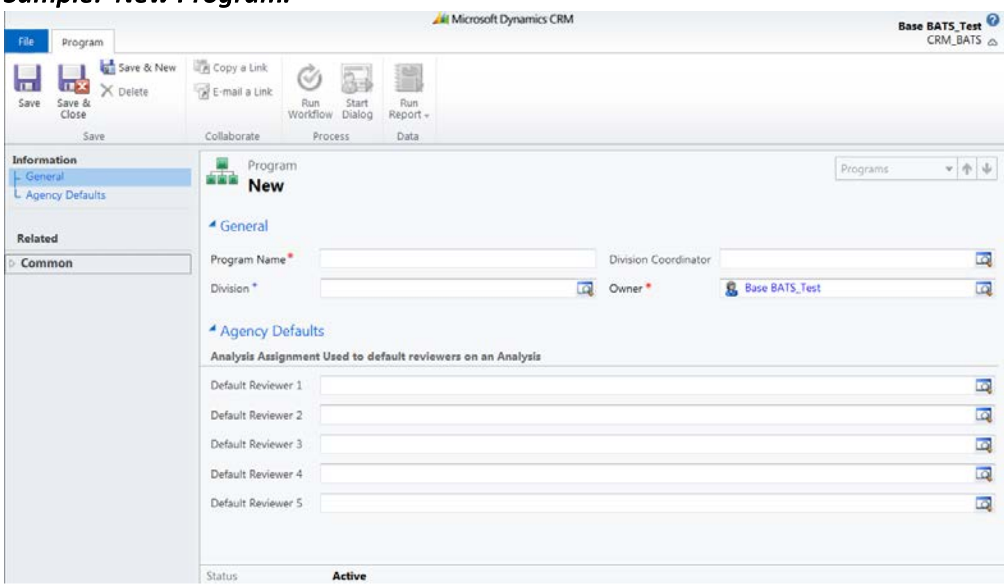
Agencies may associate specific programs with bill-related information.

- BATS programs may be used as a ‘template’ to identify a division related to a program.
- BATS programs may be used as a ‘template’ to identify agency reviewers.

The following information is required to add and/or maintain programs.

Required Field*	Value	Additional Information
Program Name*	Provided by the agency.	Free-form field for agency use.
Owner*	User Name of agency administrator.	Defaults to the User Name of the agency administrator who added the program.

Sample: New Program.



An agency may setup default values as a ‘template’ on a Program to save time and reduce data input errors.

Programs may be setup to include a default division and division coordinator.

Programs may be setup to include up to 5 default agency reviewers.

- **Agencies may setup reviewers to default from a Program instead of inputting the reviewer information for each agency analysis assignment.**

Add New Program

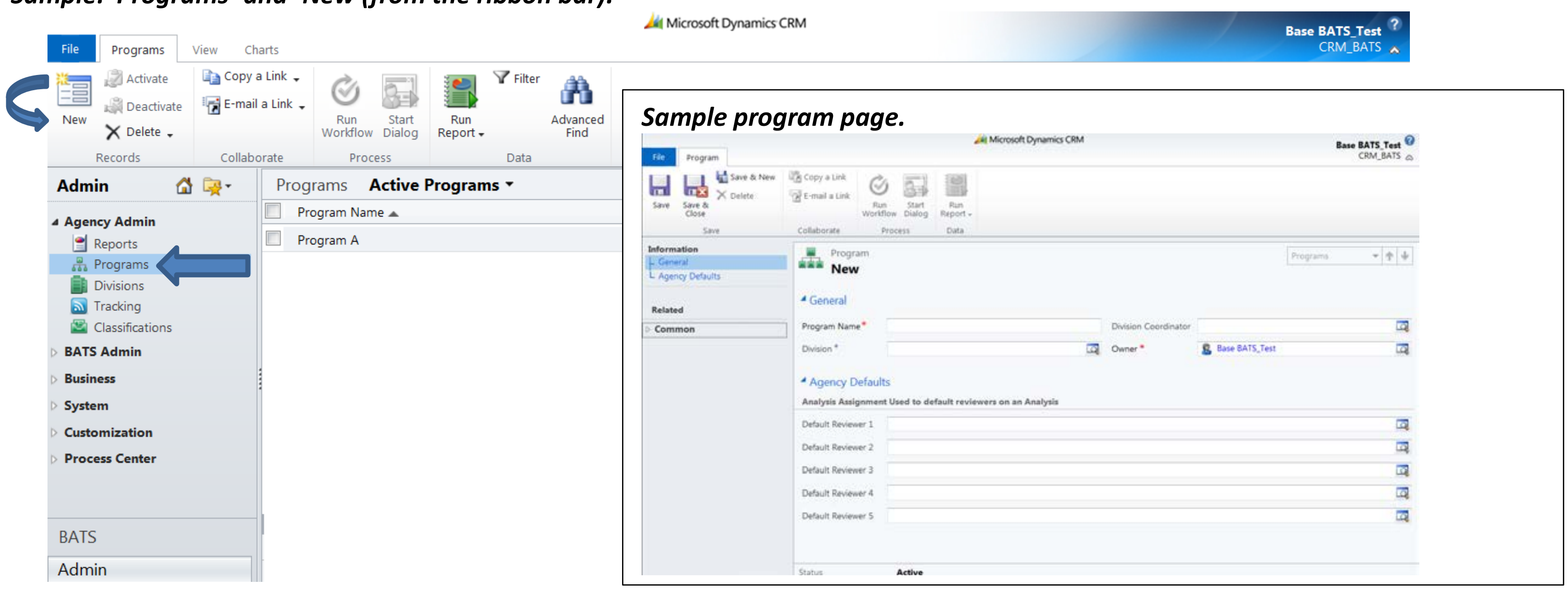
Programs are linked to the agency administrator Business Unit.

To add a new program:

1. **Select:** Admin tab (left-side navigation pane).
2. **Select:** Agency Admin (left-side navigation pane).
3. **Select:** Programs (left-side navigation pane).
4. **Select:** New (from the ribbon bar).
5. **Input:** Information about the new program.
6. **Select:** Save.

☑**Result**: New program is added. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Programs -and- New (from the ribbon bar).



Edit (Update) Program

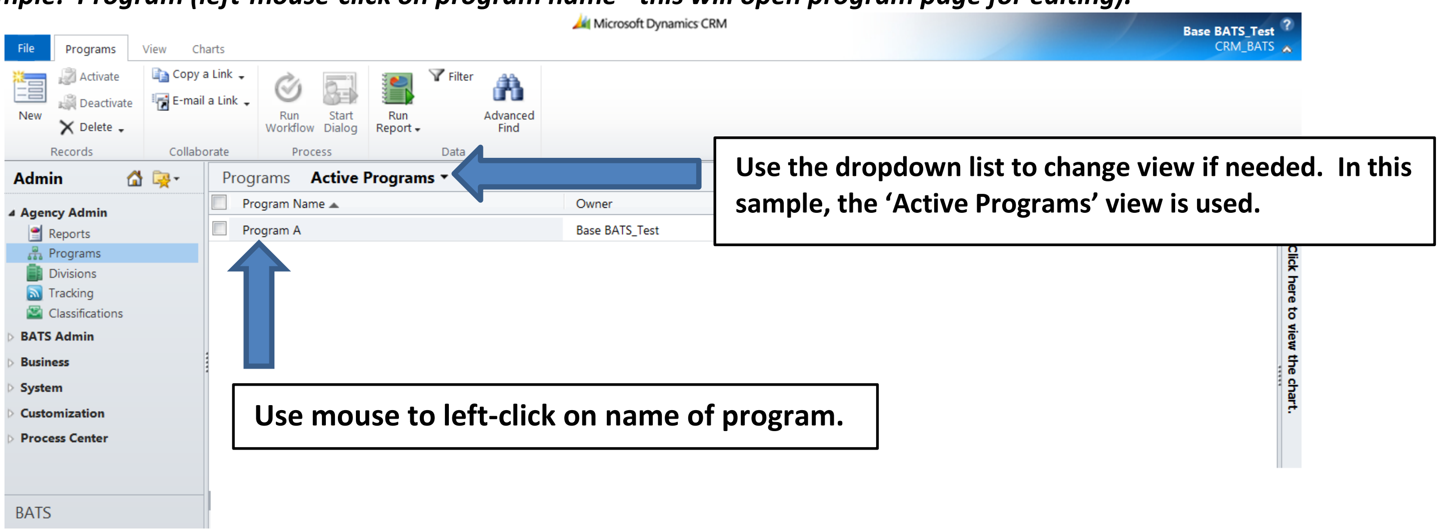
Programs are linked to the agency administrator Business Unit.

To edit (update) program information:

1. **Select:** Admin tab (left-side navigation pane).
2. **Select:** Agency Admin (left-side navigation pane).
3. **Select:** Programs (left-side navigation pane).
4. **Scroll:** To find the program (use the dropdown list to change view if needed).
5. **Select:** Program (left-mouse-click on the program name).
6. **Input:** Information about the program.
7. **Select:** Save.

☑**Result**: Program information is updated. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Program (left-mouse-click on program name - this will open program page for editing).



Activate (Enable) Program

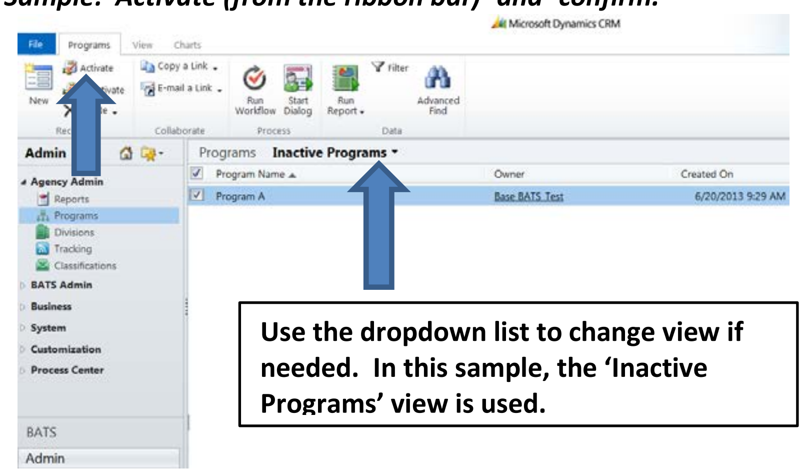
Programs are linked to the agency administrator Business Unit.

To activate (enable) a program:

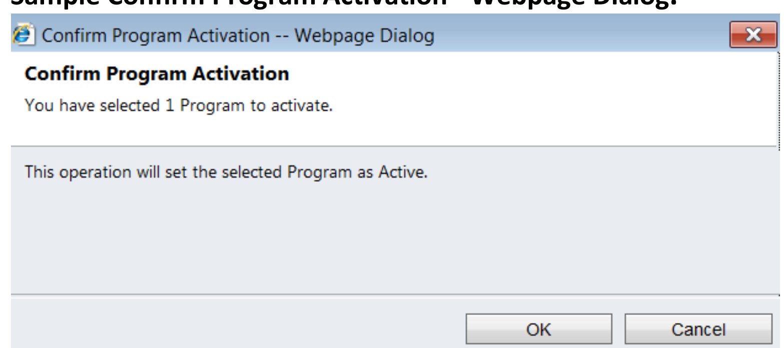
1. **Select:** Admin tab (left-side navigation pane).
2. **Select:** Agency Admin (left-side navigation pane).
3. **Select:** Programs (left-side navigation pane).
4. **Scroll**: To find the program (use the dropdown list to change view if needed).
5. **Select**: Checkbox (next to program name).
6. **Select**: Activate (from the ribbon bar).
7. **Select**: OK (in the Confirm Program Activation – Webpage Dialog box).

☑**Result**: Program is activated (enabled). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Activate (from the ribbon bar) -and- confirm.



Sample Confirm Program Activation - Webpage Dialog.



Deactivate (Disable) Program

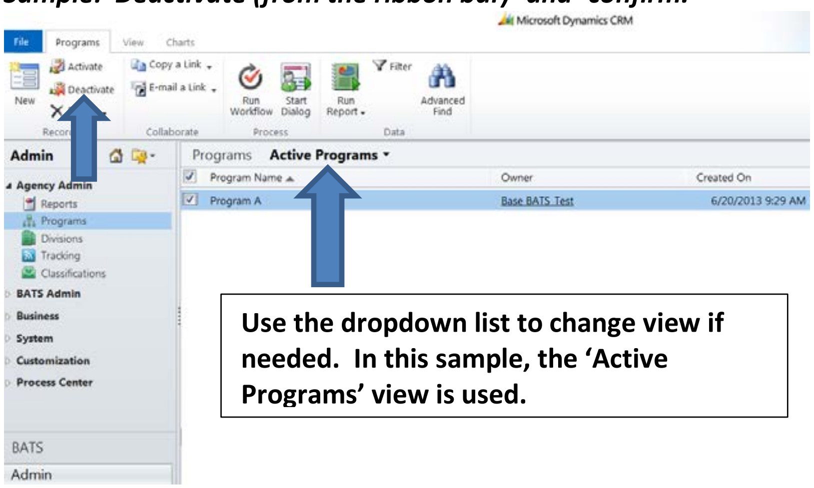
Programs are linked to the agency administrator Business Unit.

To deactivate (disable) a program:

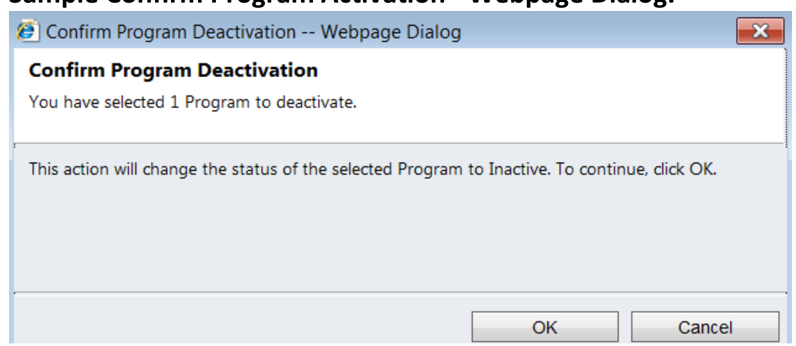
1. **Select:** Admin tab (left-side navigation pane).
2. **Select:** Agency Admin (left-side navigation pane).
3. **Select:** Programs (left-side navigation pane).
4. **Scroll**: To find the program (use the dropdown list to change view if needed).
5. **Select**: Checkbox (next to program name).
6. **Select**: Deactivate (from the ribbon bar).
7. **Select**: OK (in the Confirm Program Deactivation – Webpage Dialog box).

☑**Result**: Program is deactivated (disabled). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Deactivate (from the ribbon bar) -and- confirm.



Sample Confirm Program Activation - Webpage Dialog.



Divisions

Agencies may associate specific divisions with bill-related information.

❖ A Division may be added to a Program as a default to save time and reduce data input errors.

The following information is required to add a new division.

Required Field*	Value	Additional Information
Division Name*	Provided by the agency.	Free-form field for agency use.
Owner*	User Name of an agency administrator.	Defaults to the User Name of the agency administrator who added the division.

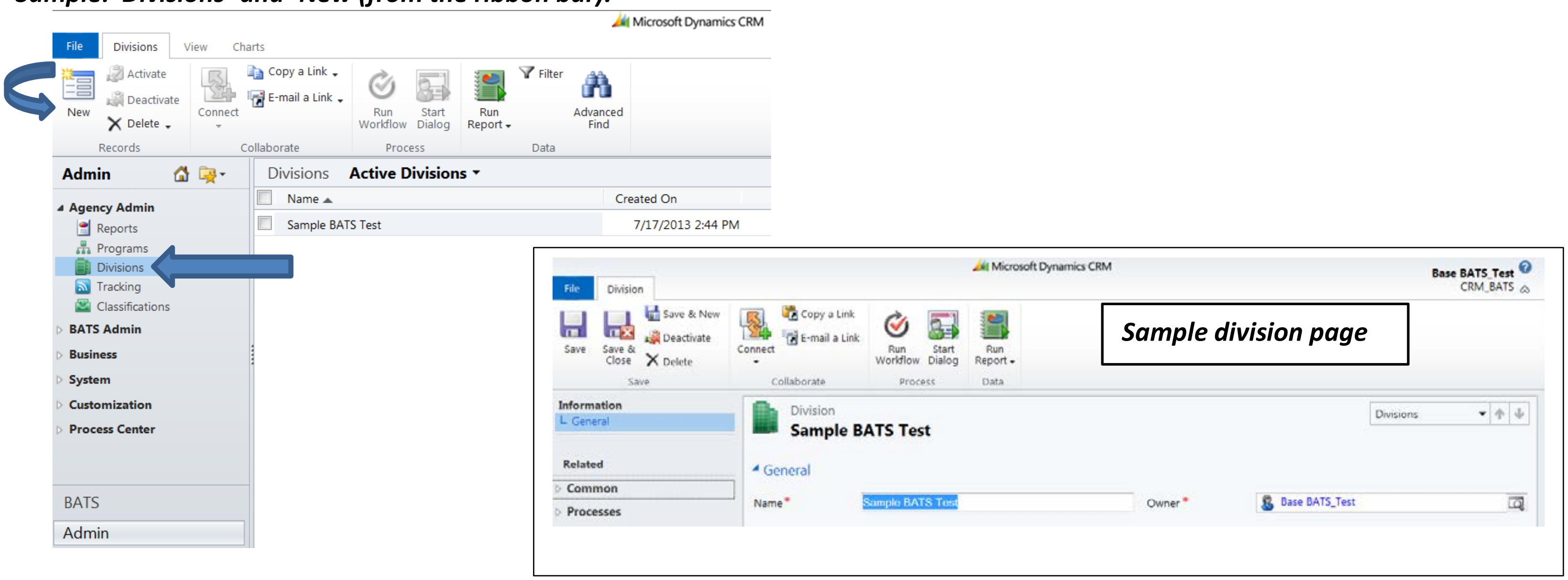
Sample: New Division.

Add New Division
Divisions are linked to the agency administrator Business Unit.

To add a new division:
1. **Select:** Admin tab (left-side navigation pane).
2. **Select:** Agency Admin (left-side navigation pane).
3. **Select:** Divisions (left-side navigation pane).
4. **Select:** New (from the ribbon bar).
5. **Input:** Information about the new division.
6. **Select:** Save.

☑**Result**: New division is added. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Divisions -and- New (from the ribbon bar).



Edit (Update) Division

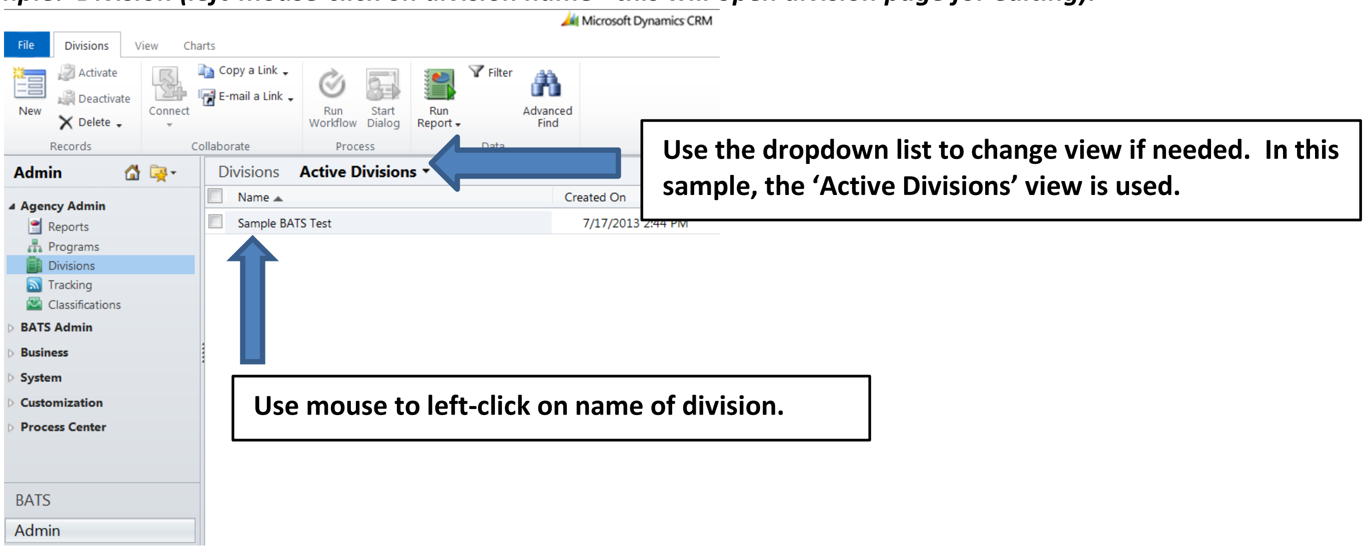
Divisions are linked to the agency administrator Business Unit.

To edit (update) division information:

1. **Select:** Admin tab (left-side navigation pane).
2. **Select:** Agency Admin (left-side navigation pane).
3. **Select:** Divisions (left-side navigation pane).
4. **Scroll:** To find the division (use the dropdown list to change view if needed).
5. **Select:** Division (left-mouse-click on the division name).
6. **Input:** Information about the division.
7. **Select:** Save.

☑**Result**: Division information is updated. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Division (left-mouse-click on division name - this will open division page for editing).



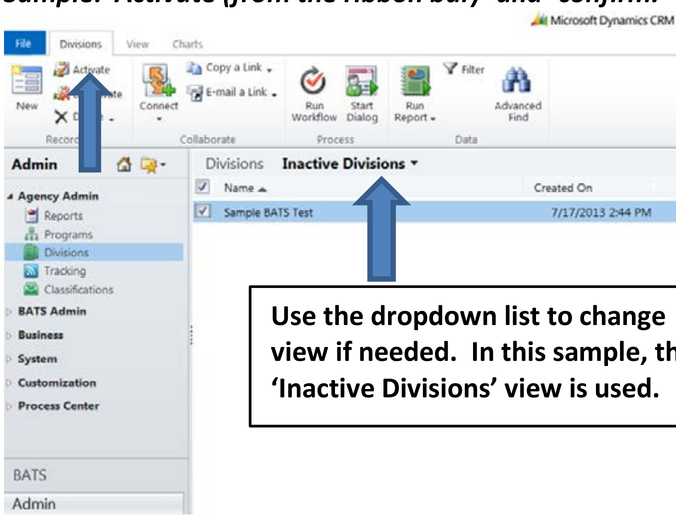
Activate (Enable) Division
Divisions are linked to the agency administrator Business Unit.

To activate (enable) a division:

1. **Select:** Admin tab (left-side navigation pane).
2. **Select:** Agency Admin (left-side navigation pane).
3. **Select:** Divisions (left-side navigation pane).
4. **Scroll**: To find the division (use the dropdown list to change view if needed).
5. **Select**: Checkbox (next to division name).
6. **Select**: Activate (from the ribbon bar).
7. **Select**: OK (in the Confirm Division Activation – Webpage Dialog box).

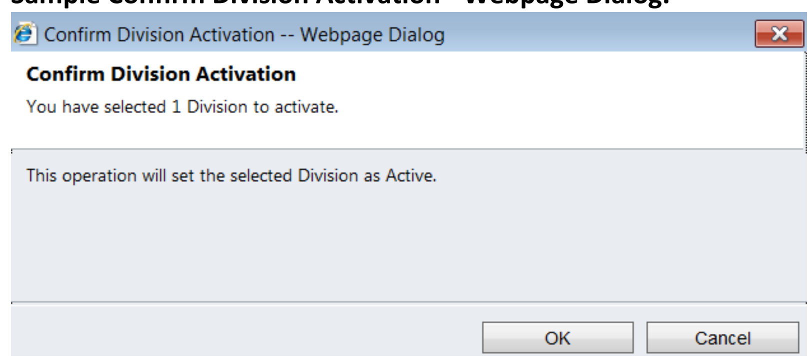
☑**Result**: Division is activated (enabled). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Activate (from the ribbon bar) -and- confirm.



Use the dropdown list to change view if needed. In this sample, the 'Inactive Divisions' view is used.

Sample Confirm Division Activation - Webpage Dialog.



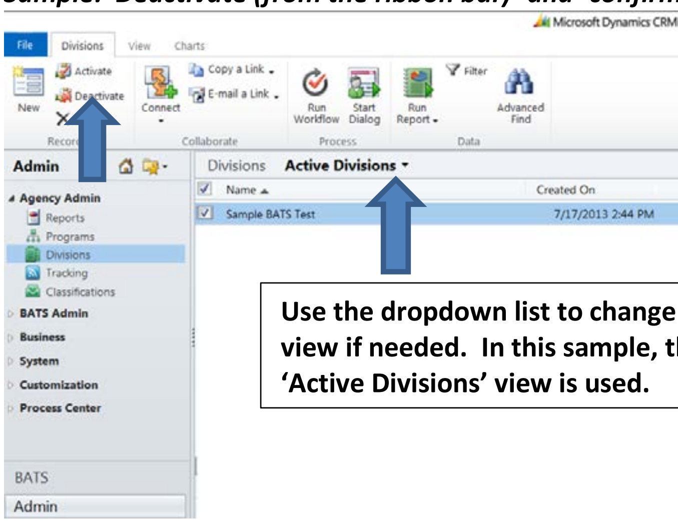
Deactivate (Disable) Division
Divisions are linked to the agency administrator Business Unit.

To deactivate (disable) a division:

1. **Select:** Admin tab (left-side navigation pane).
2. **Select:** Agency Admin (left-side navigation pane).
3. **Select:** Divisions (left-side navigation pane).
4. **Scroll**: To find the division (use the dropdown list to change view if needed).
5. **Select**: Checkbox (next to division name).
6. **Select**: Deactivate (from the ribbon bar).
7. **Select**: OK (in the Confirm Division Deactivation – Webpage Dialog box).

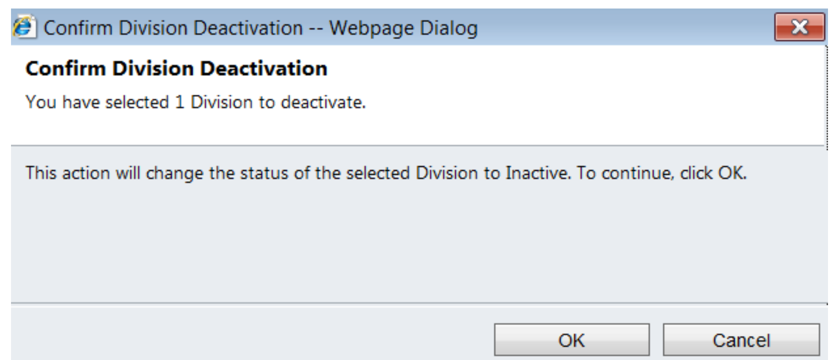
☑**Result**: Division is deactivated (disabled). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Deactivate (from the ribbon bar) -and- confirm.



Use the dropdown list to change view if needed. In this sample, the 'Active Divisions' view is used.

Sample Confirm Division Deactivation - Webpage Dialog.



Classifications

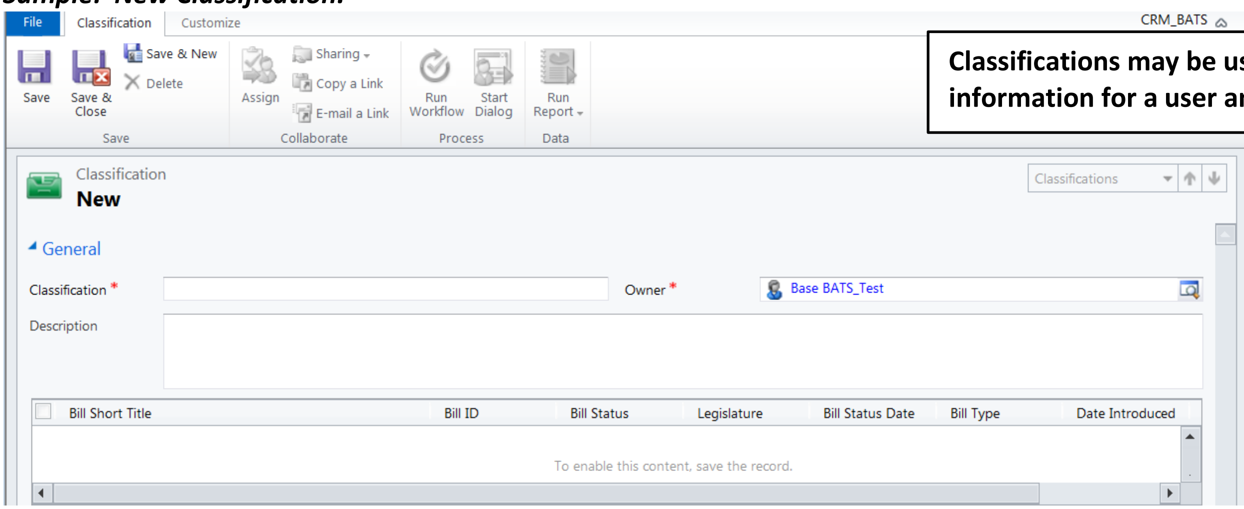
Agencies may associate specific classifications with bill-related information.

❖ Classifications may be used to track bill-related information for a user and/or team.

The following information is required to add a new classification.

Required Field*	Value	Additional Information
Classification Name*	Provided by the agency.	Free-form field for agency use.
Owner*	User Name of an agency administrator.	Defaults to the User Name of the agency administrator who added the classification.

Sample: New Classification.



Classifications may be used to track bill-related information for a user and/or team.

Add New Classification

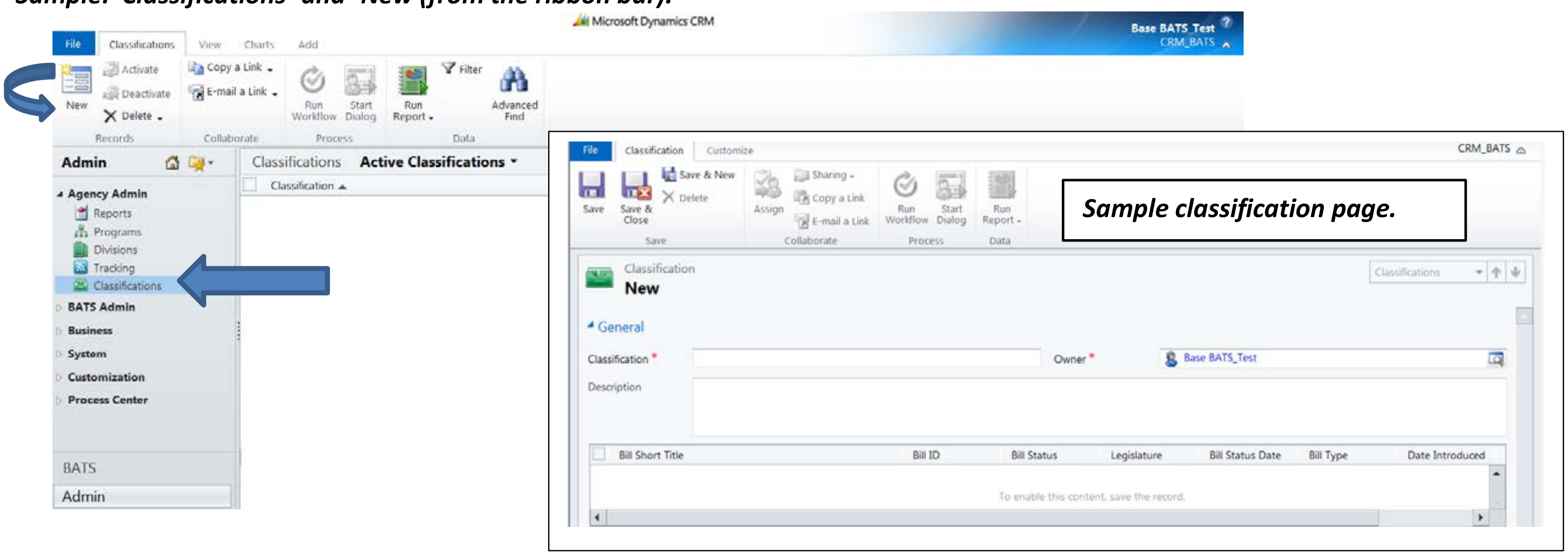
Classifications are linked to the agency administrator Business Unit.

To add a new classification:

1. **Select:** Admin tab (left-side navigation pane).
2. **Select:** Agency Admin (left-side navigation pane).
3. **Select:** Classifications (left-side navigation pane).
4. **Select:** New (from the ribbon bar).
5. **Input:** Information about the new classification.
6. **Select:** Save.

☑**Result**: New classification is added. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Classifications -and- New (from the ribbon bar).



Edit (Update) Classification

Classifications are linked to the agency administrator Business Unit.

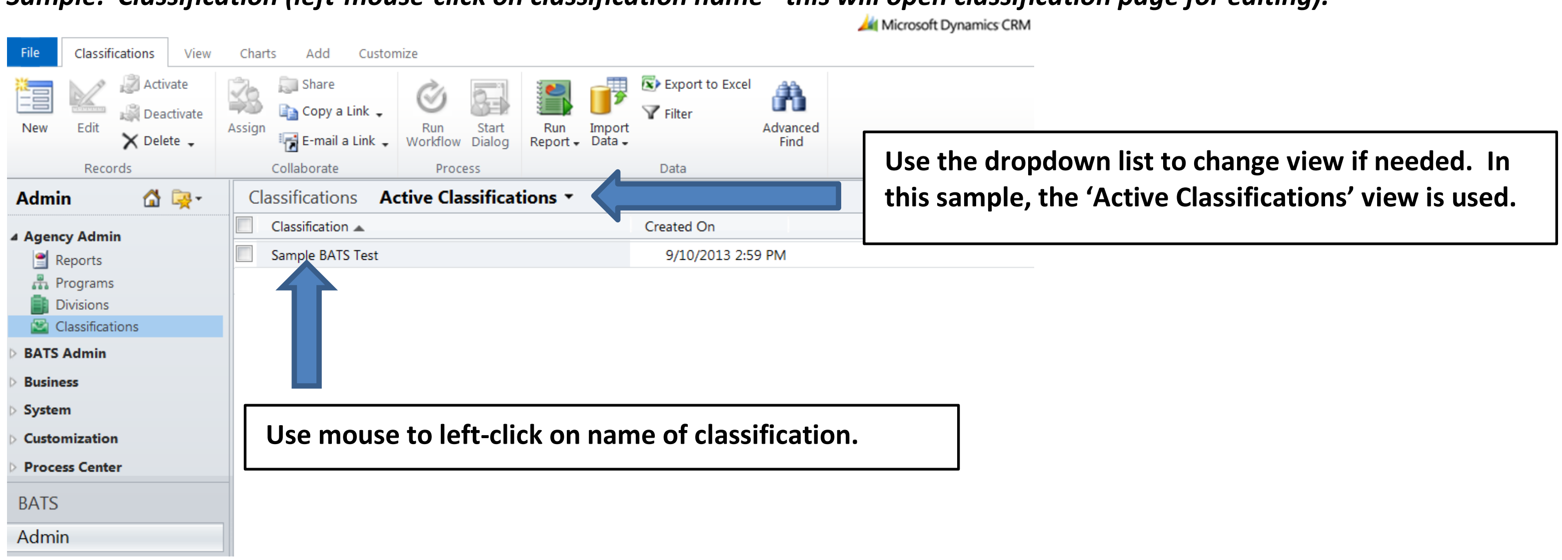
❖ Classifications may be used to track bill-related information for a user and/or team.

To edit (update) classification information:

1. **Select:** Admin tab (left-side navigation pane).
2. **Select:** Agency Admin (left-side navigation pane).
3. **Select:** Classifications (left-side navigation pane).
4. **Scroll:** To find the classification (use the dropdown list to change view if needed).
5. **Select:** Classification (left-mouse-click on the classification name).
6. **Input:** Information about the classification.
7. **Select:** Save.

☑**Result**: Classification information is updated. An error message will be displayed if the action is not allowed due to security permissions or system validation error. ➔**Note:** Additional steps are needed to edit (update) bill tracking for a classification.

Sample: Classification (left-mouse-click on classification name - this will open classification page for editing).



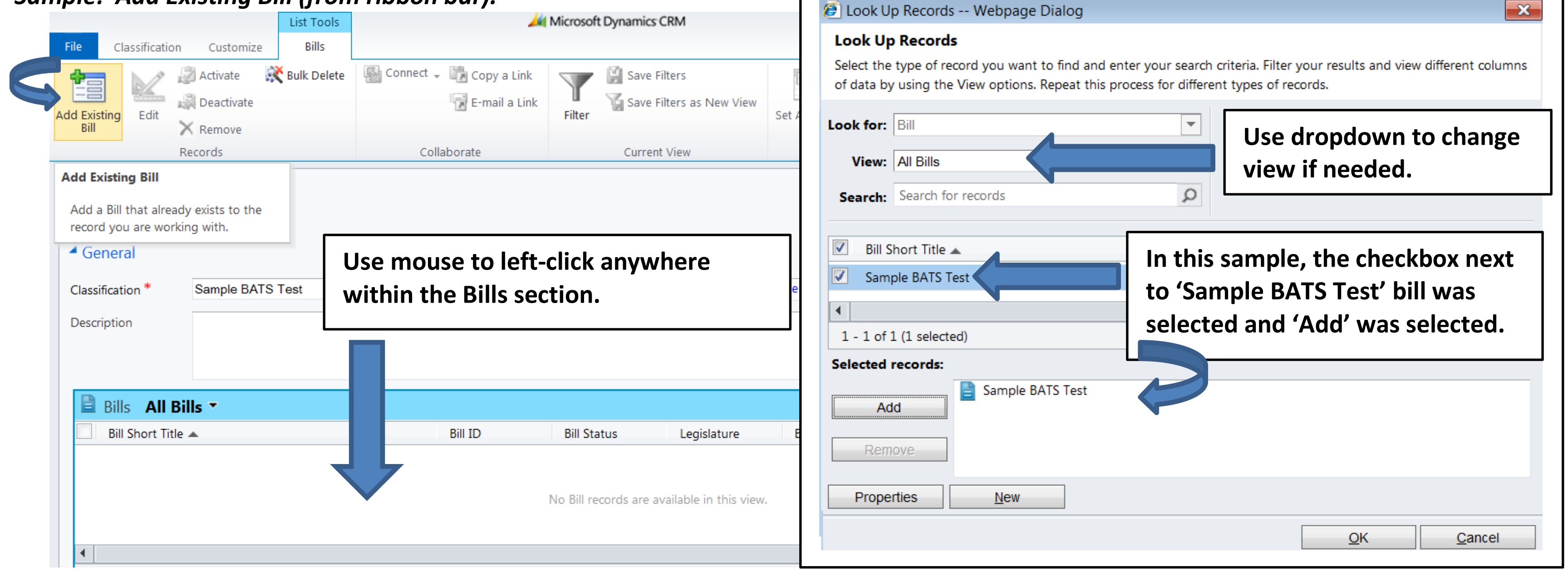
Edit (Update) Classification (continued)

To continue steps needed to edit (update) bill tracking for a classification:

1. **Select:** Bills (left-mouse-click anywhere within the Bills section).
2. **Select:** Add Existing Bill (from the ribbon bar). The system will display a Look Up Records – Webpage Dialog.
3. **Scroll:** To find the bill (use the dropdown list to change view if needed).
4. **Select:** Checkbox next to bill (short title of the bill). Note: select more than one checkbox if needed.
5. **Select:** Add.
6. **Select:** OK.
7. **Select:** Save.

☑**Result**: Bill tracking for a classification is updated. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Add Existing Bill (from ribbon bar).

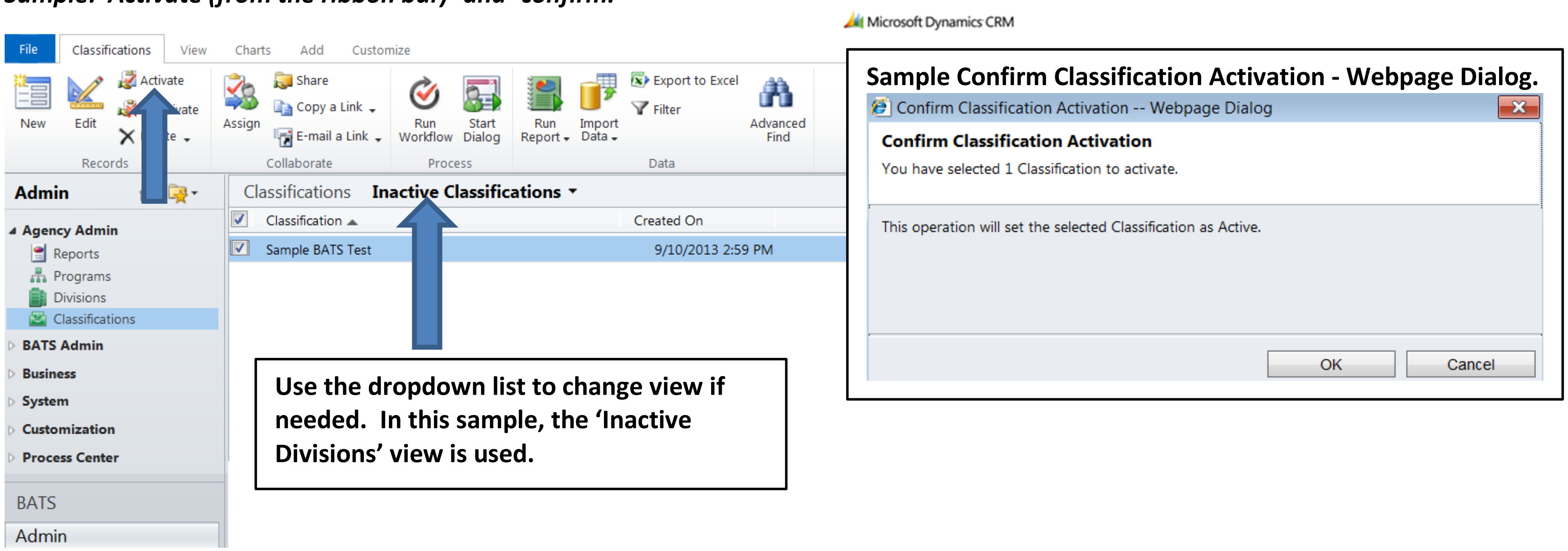


Activate (Enable) Classification
Classifications are linked to the agency administrator Business Unit.

To activate (enable) a division:
1. **Select:** Admin tab (left-side navigation pane).
2. **Select:** Agency Admin (left-side navigation pane).
3. **Select:** Classifications (left-side navigation pane).
4. **Scroll**: To find the classification (use the dropdown list to change view if needed).
5. **Select**: Checkbox (next to classification name).
6. **Select**: Activate (from the ribbon bar).
7. **Select**: OK (in the Confirm Classification Activation – Webpage Dialog box).

☑**Result**: Classification is activated (enabled). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Activate (from the ribbon bar) -and- confirm.



Deactivate (Disable) Classification

Classifications are linked to the agency administrator Business Unit.

To deactivate (disable) a classification:

1. **Select:** Admin tab (left-side navigation pane).
2. **Select:** Agency Admin (left-side navigation pane).
3. **Select:** Classification (left-side navigation pane).
4. **Scroll**: To find the classification (use the dropdown list to change view if needed).
5. **Select**: Checkbox (next to classification name).
6. **Select**: Deactivate (from the ribbon bar).
7. **Select**: OK (in the Confirm Classification Deactivation – Webpage Dialog box).

☑**Result**: Classification is deactivated (disabled). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Deactivate (from the ribbon bar) -and- confirm.