

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	<p>May have ability to access specific functions and information within BATS (userid controlled by role based security).</p> <ul style="list-style-type: none"> ❖ 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	<p>Does not have ability to access specific functions and information within BATS (does not have userid).</p> <ul style="list-style-type: none"> ❖ 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	<p>Does not have ability to access specific functions and information within BATS (does not have userid).</p> <ul style="list-style-type: none"> ❖ 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.

The screenshot displays the Microsoft Dynamics CRM interface for the BATS system. The left-hand navigation pane shows the 'BATS' tab selected, with 'Contacts' expanded to show 'Internal Contacts', 'External Contacts', and 'External Entities'. The main content area shows a list of contacts under the 'My Active Contacts' view. A dropdown menu is visible above the list, and a blue arrow points to it with the text 'Use the dropdown list to change views if needed.' Another blue arrow points to the contact names in the list with the text 'Use mouse to left-click on name of contact.' The contact list contains two entries: 'Test Contact 2 BATS' and 'Test Contact 1 BATS'. The status bar at the bottom indicates '1 - 3 of 3 (0 selected)' and 'Page 1 of 1'.

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.



Edit (update) Information About an Internal Contact

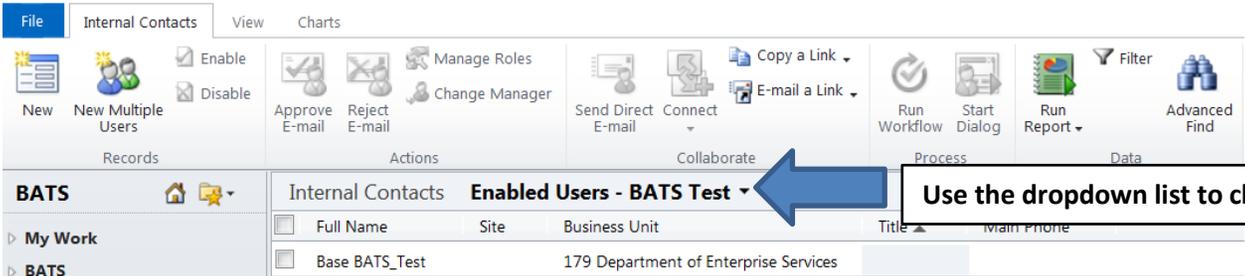
Internal contacts are linked to the agency administrator Business Unit.

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).



Microsoft Dynamics CRM

File Internal Contacts View Charts

Records: New, New Multiple Users, Enable, Disable

Actions: Approve E-mail, Reject E-mail, Manage Roles, Change Manager

Collaborate: Send Direct E-mail, Connect, E-mail a Link

Process: Run Workflow, Start Dialog, Run Report

Data: Filter, Advanced Find

BATS Internal Contacts **Enabled Users - BATS Test**

Full Name	Site	Business Unit	Title	Main Phone
Base BATS_Test	179	Department of Enterprise Services		

Use the dropdown list to change views if needed.

Use mouse to left-click on name of contact.

Enable (Activate) Internal Contact

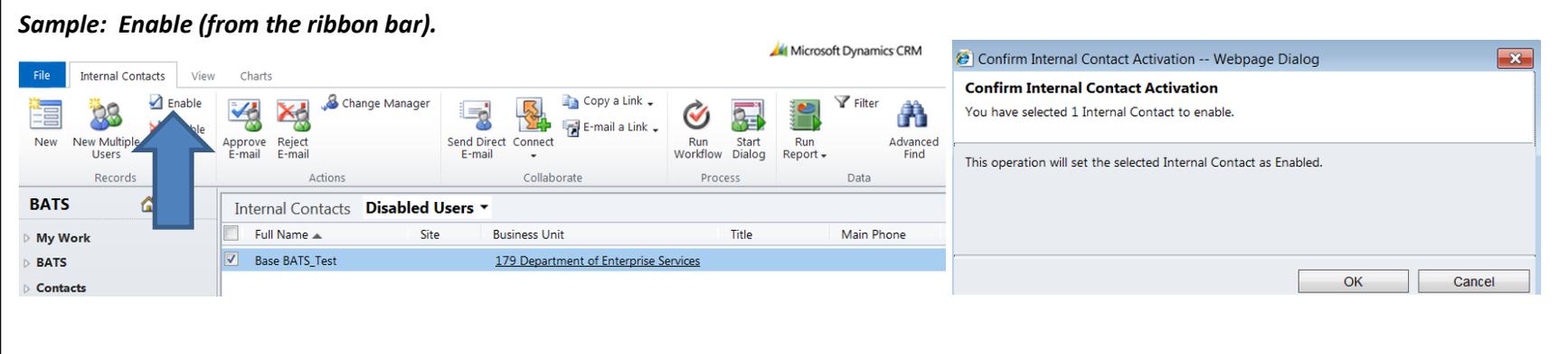
Internal contacts are linked to the agency administrator Business Unit.

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).



The screenshot shows the Microsoft Dynamics CRM interface. The left navigation pane has 'BATS' selected. The 'Internal Contacts' ribbon is active, and the 'Enable' button is highlighted with a blue arrow. The main area shows a table of 'Internal Contacts' with one contact, 'Base BATS_Test', selected. A dialog box titled 'Confirm Internal Contact Activation -- Webpage Dialog' is open, showing the message: 'Confirm Internal Contact Activation. You have selected 1 Internal Contact to enable. This operation will set the selected Internal Contact as Enabled.' with 'OK' and 'Cancel' buttons.

Full Name	Site	Business Unit	Title	Main Phone
<input checked="" type="checkbox"/>		179 Department of Enterprise Services		

Disable (Deactivate) Internal Contact

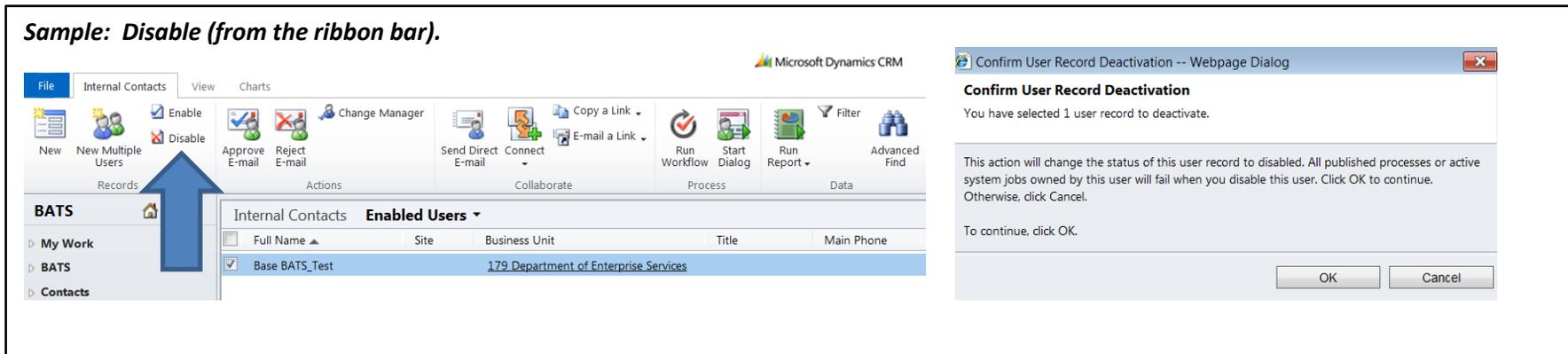
Internal contacts are linked to the agency administrator Business Unit. Internal contacts may be disabled (inactivated) but not deleted.

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).



The screenshot shows the Microsoft Dynamics CRM interface. The ribbon bar is set to 'Internal Contacts' and the 'Disable' button is highlighted with a blue arrow. The 'Enabled Users' table is visible, showing a user record 'Base BATS_Test' with a checked checkbox. The 'Confirm User Record Deactivation' dialog box is open, displaying the following text:

Confirm User Record Deactivation -- Webpage Dialog

Confirm User Record Deactivation

You have selected 1 user record to deactivate.

This action will change the status of this user record to disabled. All published processes or active system jobs owned by this user will fail when you disable this user. Click OK to continue. Otherwise, click Cancel.

To continue, click OK.

OK Cancel

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.

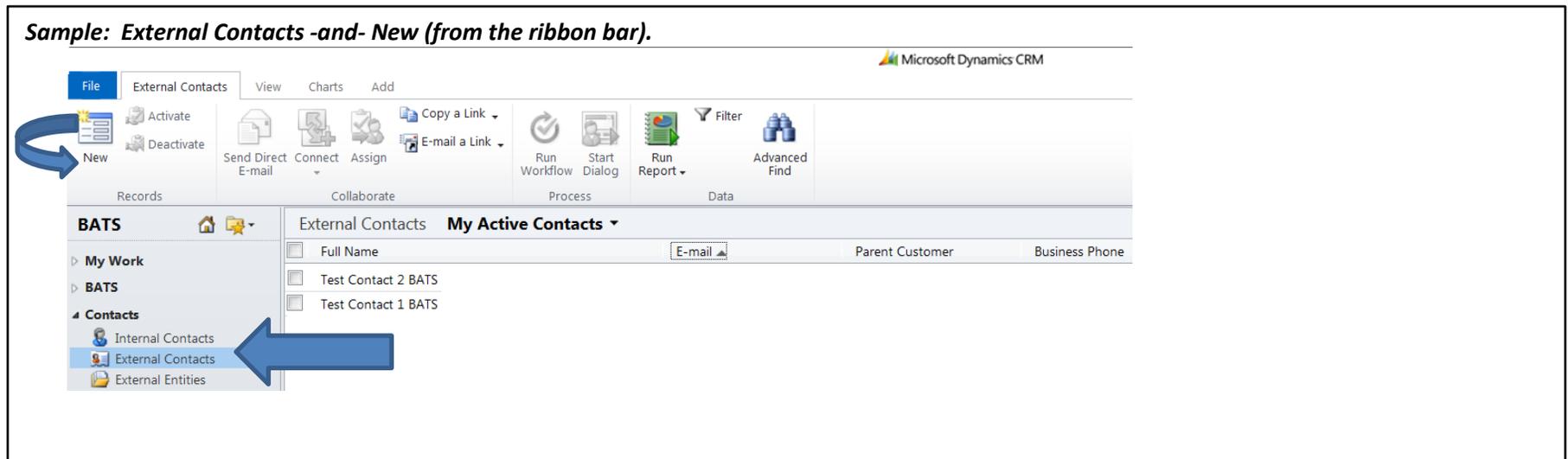
Add New External Contact

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.



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).

The screenshot displays the Microsoft Dynamics CRM interface. The top navigation bar includes 'File', 'External Contacts', 'View', 'Charts', and 'Add'. Below this is a ribbon with various action buttons like 'New', 'Activate', 'Deactivate', 'Send Direct E-mail', 'Connect', 'Assign', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', 'Run Report', 'Filter', and 'Advanced Find'. The left-hand navigation pane shows 'BATS' selected, with sub-items for 'My Work', 'BATS', and 'Contacts'. Under 'Contacts', 'External Contacts' is highlighted. The main content area shows a list of contacts under the 'External Contacts' view. A blue arrow points to the 'External Contacts' dropdown menu in the top navigation bar, with a text box stating 'Use the dropdown list to change views if needed.' Another blue arrow points to the name 'Test Contact 1 BATS' in the list, with a text box stating 'Use mouse to left-click on name of contact.'

Activate (Enable) External Contact

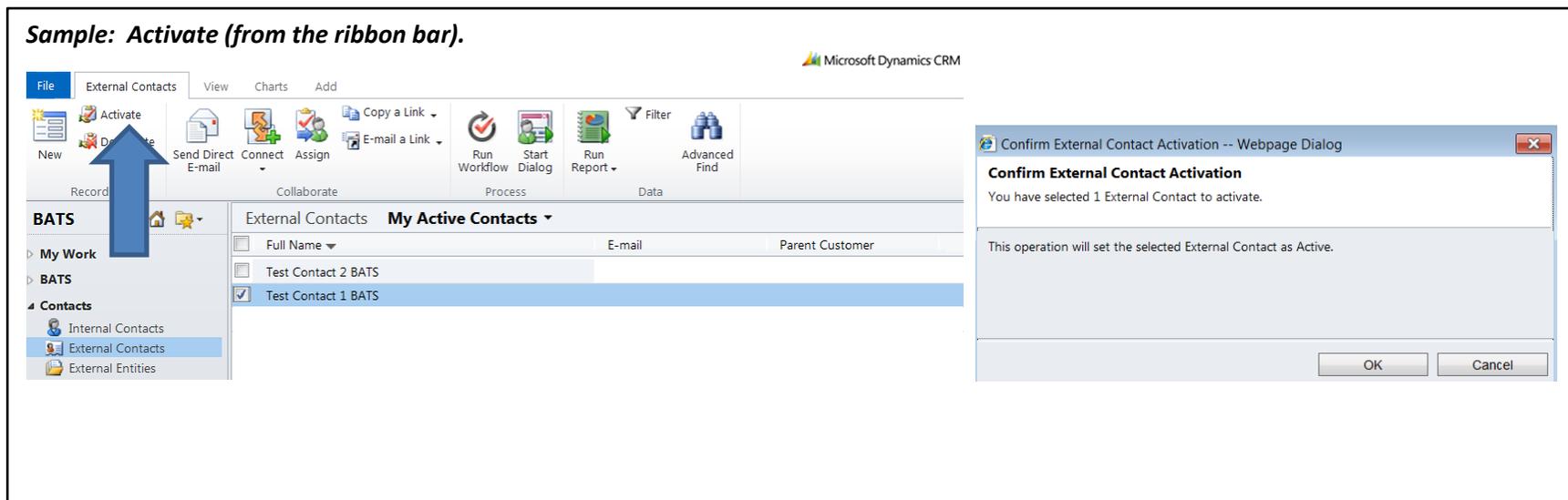
External contacts are linked to the 'owner' Business Unit.

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).



The screenshot displays the Microsoft Dynamics CRM interface. The ribbon bar is set to 'External Contacts', and the 'Activate' button is highlighted with a blue arrow. The left navigation pane shows 'BATS' > 'Contacts' > 'External Contacts' selected. The main area shows a list of external contacts with 'Test Contact 1 BATS' selected and its checkbox checked. A dialog box titled 'Confirm External Contact Activation -- Webpage Dialog' is open, displaying the message: 'Confirm External Contact Activation. You have selected 1 External Contact to activate. This operation will set the selected External Contact as Active.' The dialog box has 'OK' and 'Cancel' buttons.

Deactivate (Disable) External Contact

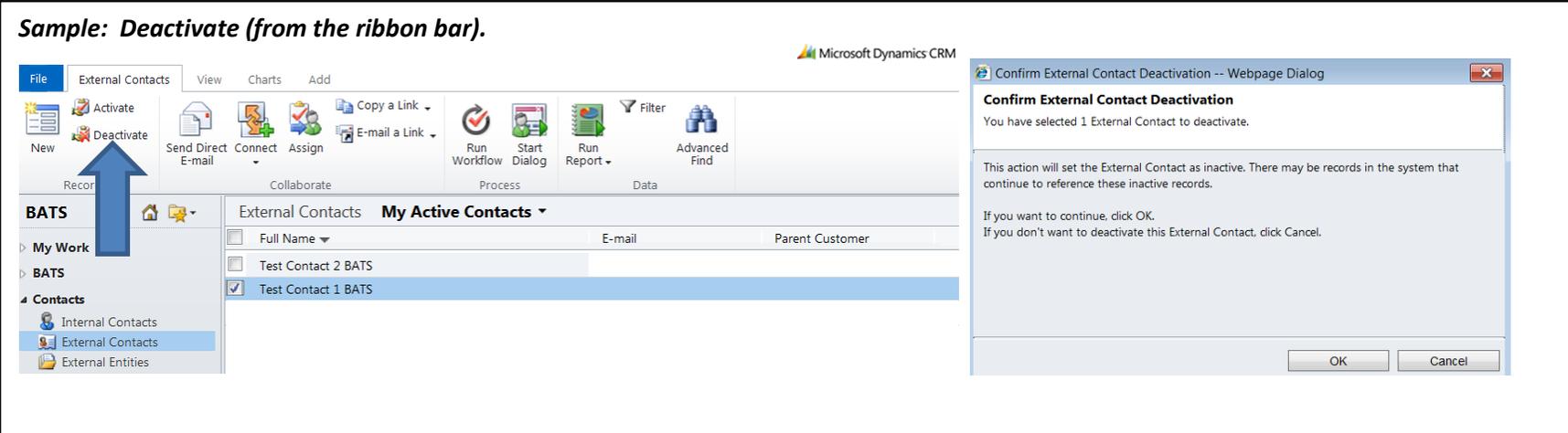
External contacts are linked to the 'owner' Business Unit.

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).



The screenshot displays the Microsoft Dynamics CRM interface. The left-hand navigation pane shows the 'BATS' tab selected, with 'External Contacts' highlighted under the 'Contacts' section. A blue arrow points to the 'Deactivate' button on the 'External Contacts' ribbon. The main window shows a list of external contacts with 'Test Contact 1 BATS' selected and its checkbox checked. A 'Confirm External Contact Deactivation' dialog box is open, displaying the message: 'You have selected 1 External Contact to deactivate. This action will set the External Contact as inactive. There may be records in the system that continue to reference these inactive records. If you want to continue, click OK. If you don't want to deactivate this External Contact, click Cancel.' The dialog box has 'OK' and 'Cancel' buttons at the bottom.

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	<p>Defaults to the User Name of the agency user or agency administrator who added the contact.</p> <ul style="list-style-type: none"> ❖ 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.

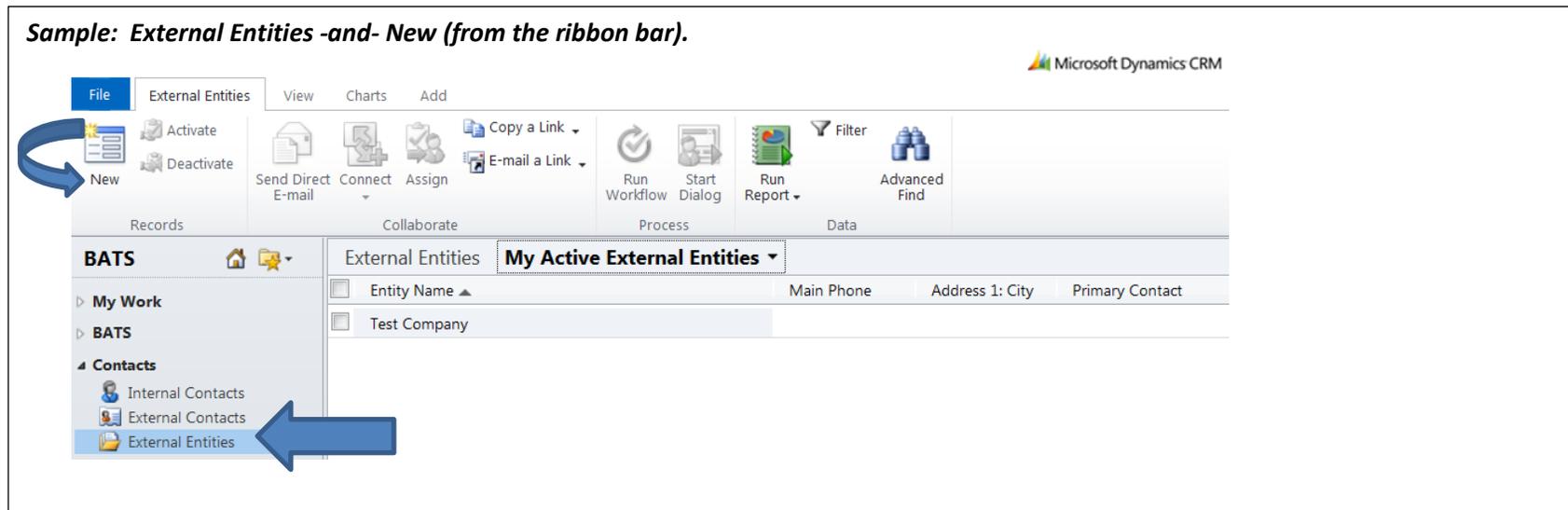
Add New External Entity

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.



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).

Microsoft Dynamics CRM

File External Entities View Charts Add

Records Collaborate Process Data

External Entities **My Active External Entities**

Entity Name Main Phone Address 1: City Primary Contact

Test Company

Use the dropdown list to change views if needed

Use mouse to left-click on name of contact.

Activate (Enable) External Entity

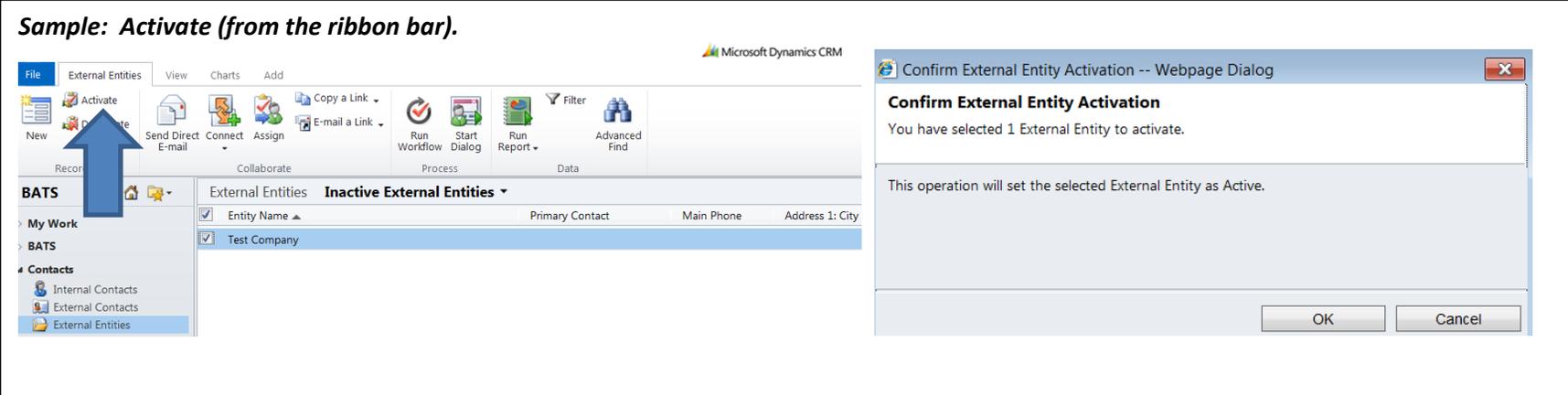
External entities are linked to the 'owner' Business Unit.

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).



The screenshot displays the Microsoft Dynamics CRM interface. On the left, the navigation pane shows 'BATS' selected, with 'External Entities' highlighted under the 'Contacts' section. The ribbon bar at the top features the 'Activate' button, which is highlighted with a blue arrow. The main area shows a list of external entities, with 'Test Company' selected. A dialog box titled 'Confirm External Entity Activation -- Webpage Dialog' is open on the right, displaying the message: 'Confirm External Entity Activation. You have selected 1 External Entity to activate. This operation will set the selected External Entity as Active.' The dialog box has 'OK' and 'Cancel' buttons at the bottom.

Deactivate (Disable) External Entity

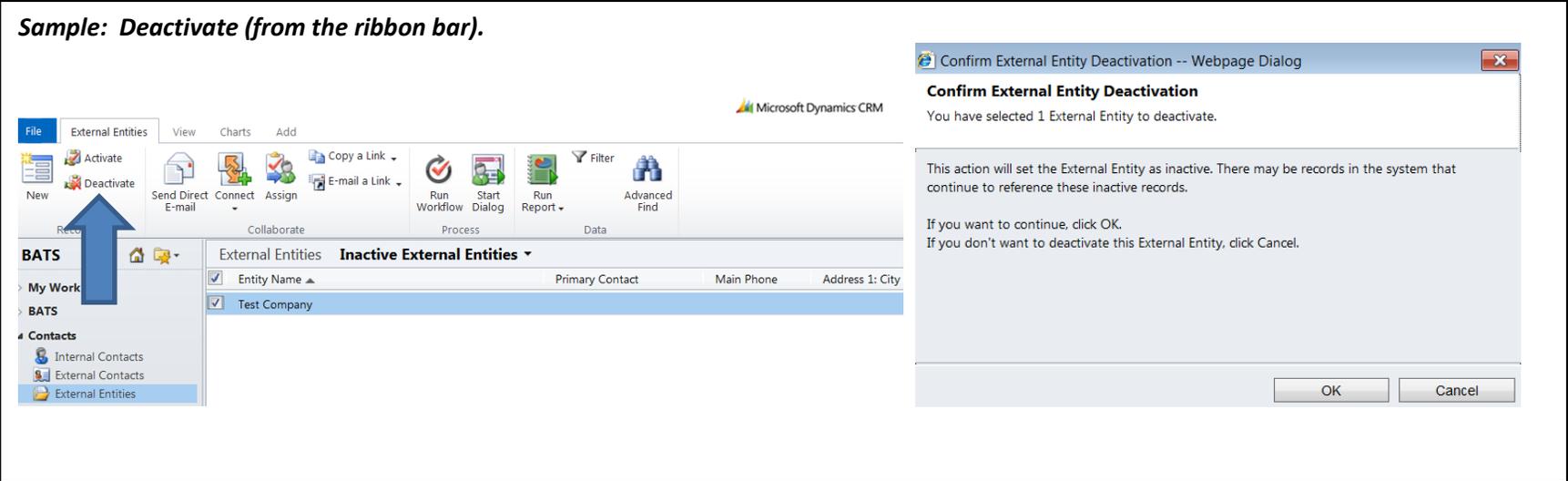
External entities are linked to the 'owner' Business Unit.

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 screenshot displays the Microsoft Dynamics CRM interface. The ribbon bar is set to 'External Entities', and the 'Deactivate' button in the 'Records' group is highlighted with a blue arrow. The left navigation pane shows 'BATS' > 'Contacts' > 'External Entities' selected. The main area shows a list of external entities with 'Test Company' selected. A dialog box titled 'Confirm External Entity Deactivation -- Webpage Dialog' is open, displaying the following text:

Confirm External Entity Deactivation
You have selected 1 External Entity to deactivate.

This action will set the External Entity as inactive. There may be records in the system that continue to reference these inactive records.

If you want to continue, click OK.
If you don't want to deactivate this External Entity, click Cancel.

OK Cancel

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)	<ul style="list-style-type: none"> ❖ Agency Coordinator ❖ Agency Administrator 	Additional role assigned to agency coordinators. <ul style="list-style-type: none"> ❖ 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)	<ul style="list-style-type: none"> ❖ Agency Administrator 	Additional role assigned to agency administrators. <ul style="list-style-type: none"> ❖ 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)	<ul style="list-style-type: none"> ❖ Oversight Analyst ❖ Oversight Reviewer ❖ Oversight Coordinator ❖ Oversight Administrator ❖ Oversight Gov's Office 	Basic (base) role assigned to all executive/oversight users. <ul style="list-style-type: none"> ❖ 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)	<ul style="list-style-type: none"> ❖ Oversight Reviewer ❖ Oversight Coordinator ❖ Oversight Administrator ❖ Oversight Gov's Office 	Additional role assigned to executive/oversight reviewers. <ul style="list-style-type: none"> ❖ 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)	<ul style="list-style-type: none"> ❖ Oversight Coordinator ❖ Oversight Administrator ❖ Oversight Gov's Office 	<p>Additional role assigned to executive/oversight coordinators and administrators).</p> <ul style="list-style-type: none"> ❖ 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)	<ul style="list-style-type: none"> ❖ Oversight Administrator ❖ Oversight Gov's Office 	<p>Additional role assigned to executive/oversight administrators.</p> <ul style="list-style-type: none"> ❖ 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)	<ul style="list-style-type: none"> ❖ Oversight Gov's Office 	Additional role assigned to executive/oversight policy users. <ul style="list-style-type: none"> ❖ 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)	<ul style="list-style-type: none"> ❖ 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. <ul style="list-style-type: none"> ❖ Track bills for user. ❖ Receive email update (hourly and/or daily) for tracked bills.
BATS Team Tracking User (additive)	<ul style="list-style-type: none"> ❖ 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. <ul style="list-style-type: none"> ❖ 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.

The screenshot shows the BATS Administration page. The left navigation pane has the 'Admin' tab selected. Under 'System', 'Administration' is highlighted. The main content area is titled 'Administration' and asks 'Which feature would you like to work with?'. It lists four options: Announcements, Business Units, Security Roles, and Users. Two callout boxes with arrows point to the 'Teams' and 'Users' options. A third callout box points to the 'Admin' tab in the navigation pane.

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).

The screenshot shows the Microsoft Dynamics CRM interface for the 'Internal Contacts' entity. The ribbon bar includes the following groups: Records (New, New Multiple Users), Actions (Enable, Disable, Approve E-mail, Reject E-mail, Change Manager), Collaborate (Send Direct E-mail, Connect), Process (Copy a Link, E-mail a Link, Run Workflow, Start Dialog), and Data (Run Report, Filter, Advanced Find). A blue arrow points to the 'New' button in the Records group. Below the ribbon bar, the 'Internal Contacts' table is displayed with the following data:

Full Name ▲	Site	Business Unit	Title	Main Phone
<input type="checkbox"/> Base BATS_Test		179 Department of Enterprise Services		

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.

The screenshot shows the user interface for viewing roles assigned to a user. The user is 'Internal Contact' and the user name is 'Base BATS_Test'. A warning message states: 'The information provided in this form is viewable by the entire organization.' The 'Security Roles' section is active, showing a 'Role Associated View' dropdown menu. Below this is a table of roles:

Name	Business Unit
BATS Agency Administrator (Additive)	179 Department of Enterprise Services
BATS Agency Analyst (Additive)	179 Department of Enterprise Services
BATS Agency Coordinator (Additive)	179 Department of Enterprise Services
BATS Agency Reviewer (Additive)	179 Department of Enterprise Services
BATS Agency User (base)	179 Department of Enterprise Services

Add (Assign) Role to User

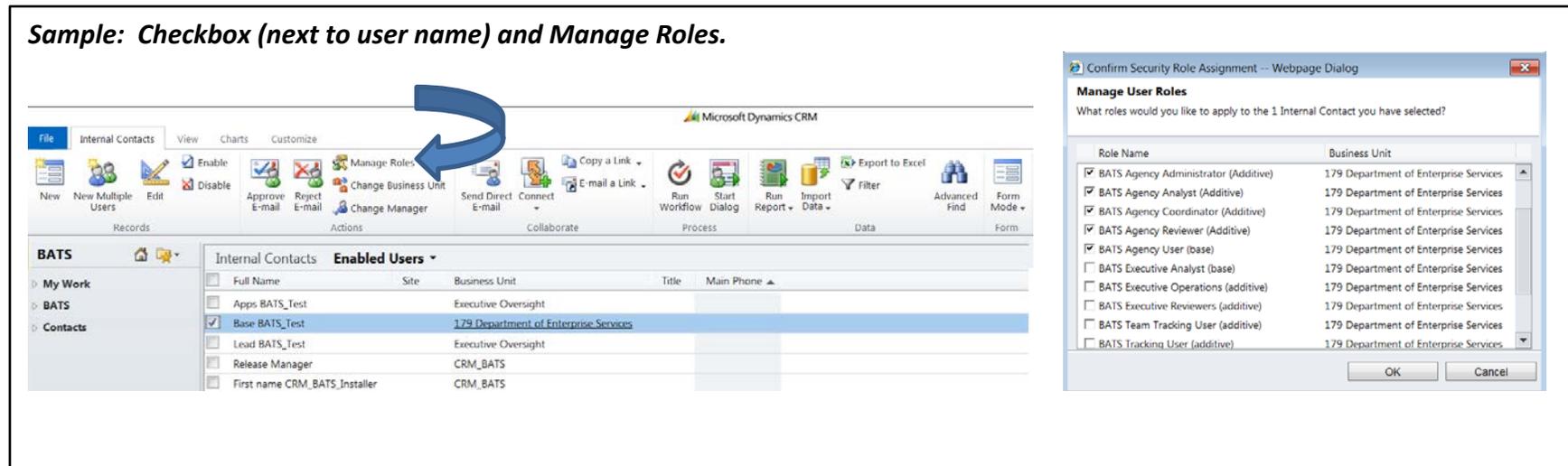
One or more roles may be added to a user.

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.



The screenshot shows the Microsoft Dynamics CRM interface. The 'Internal Contacts' list is displayed with the following data:

Full Name	Site	Business Unit	Title	Main Phone
Apps BATS_Test		Executive Oversight		
<input checked="" type="checkbox"/> Base BATS_Test		179 Department of Enterprise Services		
<input type="checkbox"/> Lead BATS_Test		Executive Oversight		
<input type="checkbox"/> Release Manager		CRM_BATS		
<input type="checkbox"/> First name CRM_BATS_Installer		CRM_BATS		

The 'Confirm Security Role Assignment' dialog box is open, showing the following roles and checkboxes:

Role Name	Business Unit
<input checked="" type="checkbox"/> BATS Agency Administrator (Additive)	179 Department of Enterprise Services
<input checked="" type="checkbox"/> BATS Agency Analyst (Additive)	179 Department of Enterprise Services
<input checked="" type="checkbox"/> BATS Agency Coordinator (Additive)	179 Department of Enterprise Services
<input checked="" type="checkbox"/> BATS Agency Reviewer (Additive)	179 Department of Enterprise Services
<input checked="" type="checkbox"/> BATS Agency User (base)	179 Department of Enterprise Services
<input type="checkbox"/> BATS Executive Analyst (base)	179 Department of Enterprise Services
<input type="checkbox"/> BATS Executive Operations (additive)	179 Department of Enterprise Services
<input type="checkbox"/> BATS Executive Reviewers (additive)	179 Department of Enterprise Services
<input type="checkbox"/> BATS Team Tracking User (additive)	179 Department of Enterprise Services
<input type="checkbox"/> BATS Tracking User (additive)	179 Department of Enterprise Services

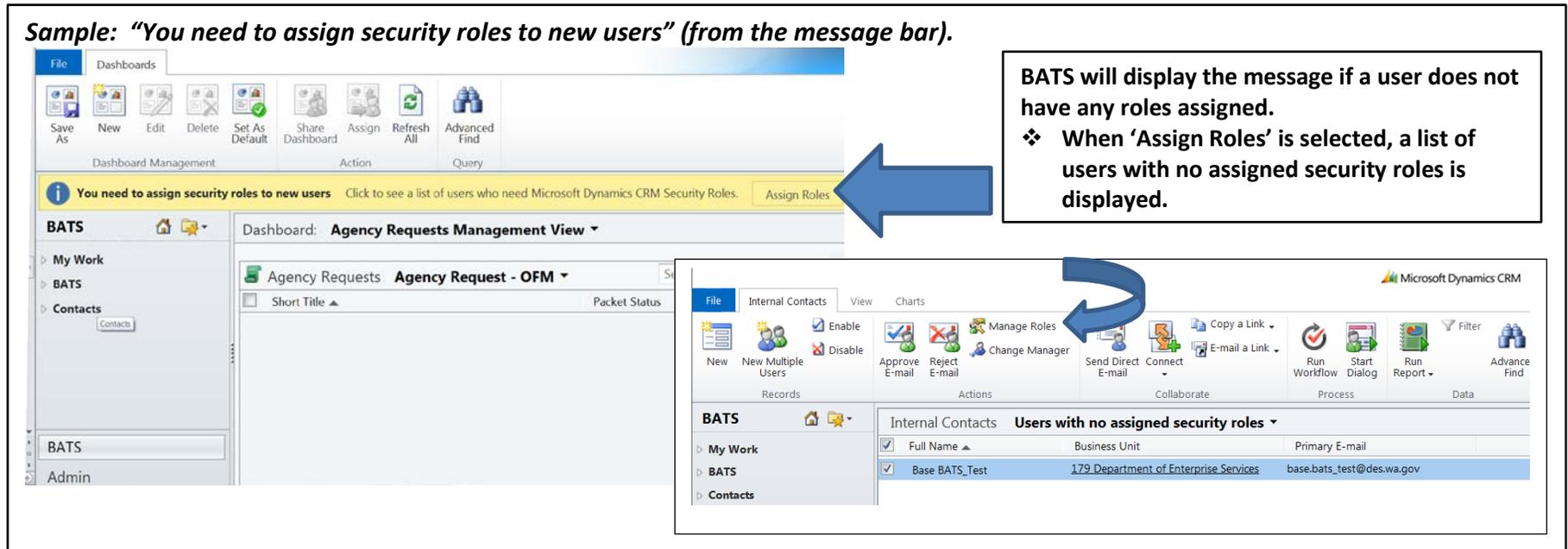
“You need to assign security roles to new users” Message

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.

The screenshot shows the BATS interface with a message bar at the top that reads: "You need to assign security roles to new users. Click to see a list of users who need Microsoft Dynamics CRM Security Roles." Below the message bar is a ribbon bar with the "Assign Roles" button highlighted. A blue arrow points from the callout box to this button. Another blue arrow points from the "Assign Roles" button to a second screenshot of the interface. This second screenshot shows the "Internal Contacts" ribbon bar with the "Manage Roles" button highlighted. Below the ribbon bar, a list of users is displayed under the heading "Users with no assigned security roles". The list includes a user named "Base BATS_Test" with the business unit "179 Department of Enterprise Services" and the email address "base.bats_test@des.wa.gov".

Full Name	Business Unit	Primary E-mail
<input checked="" type="checkbox"/> Base BATS_Test	179 Department of Enterprise Services	base.bats_test@des.wa.gov

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	<ul style="list-style-type: none"> ❖ 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	<ul style="list-style-type: none"> ❖ 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	<ul style="list-style-type: none"> ❖ 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.

The screenshot shows the 'Join Teams' ribbon bar with the 'Join Teams' button highlighted. A blue arrow points from this button to the 'Look Up Records' dialog box. The dialog box is titled 'Look Up Records -- Webpage Dialog' and contains the following information:

- Look Up Records**
Select the type of record you want to find and enter your search criteria. Filter your results and view different columns of data by using the View options. Repeat this process for different types of records.
- Look for:** Team
- View:** Teams Lookup View
- Search:** Search for records
- Results:**

<input checked="" type="checkbox"/>	Team Name	Business Unit
<input checked="" type="checkbox"/>	Analysis Assignment Update	179 Departmen...
- Selected records:**
 - Analysis Assignment Update
- Buttons:** Add, Remove, Properties, New, OK, Cancel

Add (Join) 'OFM Agency Request' Team

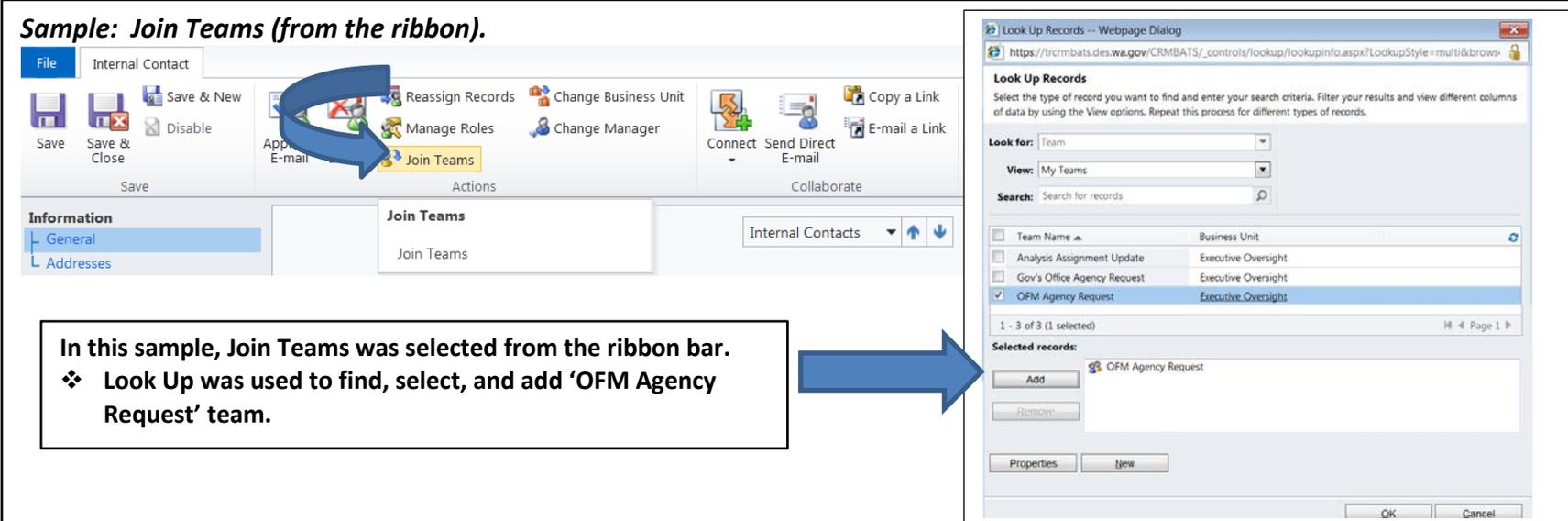
The 'OFM Agency Request' team needs to be added (joined) for some users so that items in the system generated oversight queues will be available.

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.

Team Name	Business Unit
<input type="checkbox"/> Analysis Assignment Update	Executive Oversight
<input type="checkbox"/> Gov's Office Agency Request	Executive Oversight
<input checked="" type="checkbox"/> OFM Agency Request	Executive Oversight

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

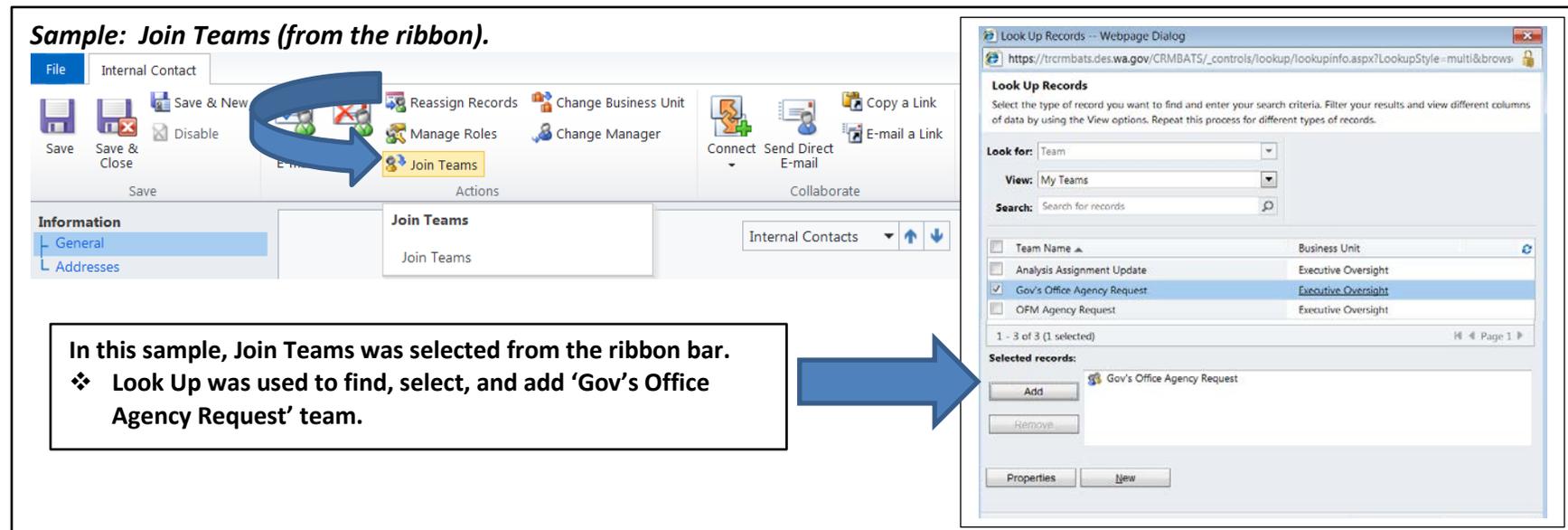
The 'Gov's Office Agency Request' team needs to be added (joined) for some users so that items in the system generated oversight queues will be available.

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.

The screenshot shows the 'Look Up Records' dialog box with the following details:

- Look for:** Team
- View:** My Teams
- Search:** Search for records
- Table:**

Team Name	Business Unit
<input type="checkbox"/> Analysis Assignment Update	Executive Oversight
<input checked="" type="checkbox"/> Gov's Office Agency Request	Executive Oversight
<input type="checkbox"/> OFM Agency Request	Executive Oversight

1 - 3 of 3 (1 selected) Page 1

Selected records:

- Gov's Office Agency Request

Buttons: Add, Remove, Properties, New

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.

The screenshot shows the 'Internal Contact' page for 'Base BATS_Test'. A yellow warning banner states: 'The information provided in this form is viewable by the entire organization.' Below this is the 'Security Roles' section in 'Role Associated View'. The 'Manage Roles' button is active, and the 'Remove Roles' button is also visible. A table lists the following roles:

<input type="checkbox"/>	Name ▲	Business Unit
<input type="checkbox"/>	BATS Agency Administrator (Additive)	179 Department of Enterprise Services
<input type="checkbox"/>	BATS Agency Analyst (Additive)	179 Department of Enterprise Services
<input type="checkbox"/>	BATS Agency Coordinator (Additive)	179 Department of Enterprise Services
<input checked="" type="checkbox"/>	BATS Agency Reviewer (Additive)	179 Department of Enterprise Services
<input type="checkbox"/>	BATS Agency User (base)	179 Department of Enterprise Services

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.

The screenshot displays the Microsoft Dynamics CRM interface. The ribbon bar is set to 'Internal Contacts' and the 'Disable' button is highlighted with a blue arrow. Below the ribbon, a table lists users under the 'Enabled Users' view. The user 'Base BATS_Test' is selected, and its 'Site' is '179 Department of Enterprise Services'. An overlay dialog box titled 'Confirm User Record Deactivation -- Webpage Dialog' is open, showing the message: 'You have selected 1 user record to deactivate. This action will change the status of this user record to disabled. All published processes or active system jobs owned by this user will fail when you disable this user. Click OK to continue. Otherwise, click Cancel. To continue, click OK.' The dialog box has 'OK' and 'Cancel' buttons at the bottom.

Full Name ▲	Site	Business Unit	Title	Main Phone
<input checked="" type="checkbox"/> Base BATS_Test	179 Department of Enterprise Services			

Enable (Activate) a User

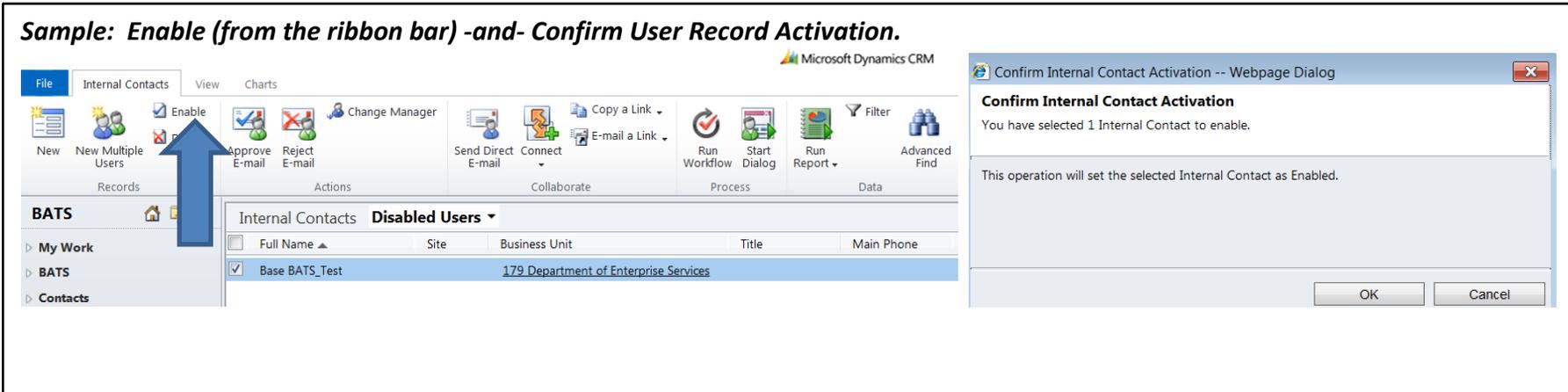
Agency and executive administrators may enable (activate) a user that has been disabled (deactivated).

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 screenshot displays the Microsoft Dynamics CRM interface. The ribbon bar is set to 'Internal Contacts' and the 'View' is 'Charts'. The 'Actions' group contains the 'Enable' button, which is highlighted by a blue arrow. Below the ribbon, the 'Internal Contacts' list is shown with the 'Disabled Users' view selected. The list contains one entry: 'Base BATS_Test' with a checked checkbox and the business unit '179 Department of Enterprise Services'. To the right, a dialog box titled 'Confirm Internal Contact Activation -- Webpage Dialog' is open, displaying the message: 'Confirm Internal Contact Activation. You have selected 1 Internal Contact to enable. This operation will set the selected Internal Contact as Enabled.' The dialog box has 'OK' and 'Cancel' buttons at the bottom.

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. <ul style="list-style-type: none"> ❖ 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. <ul style="list-style-type: none"> ❖ 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. <ul style="list-style-type: none"> ❖ 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

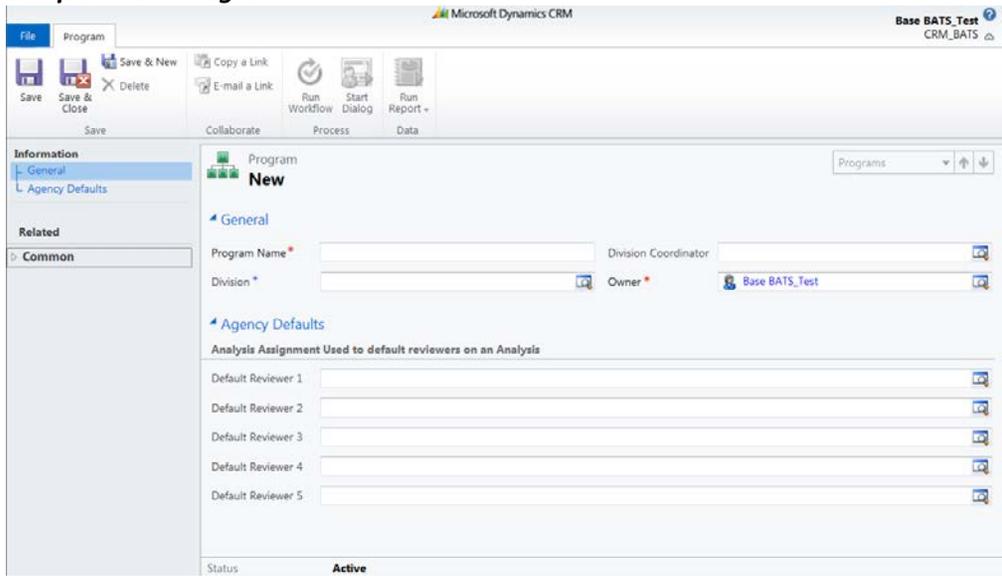
Agencies may associate specific programs with bill-related information.

- ❖ 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

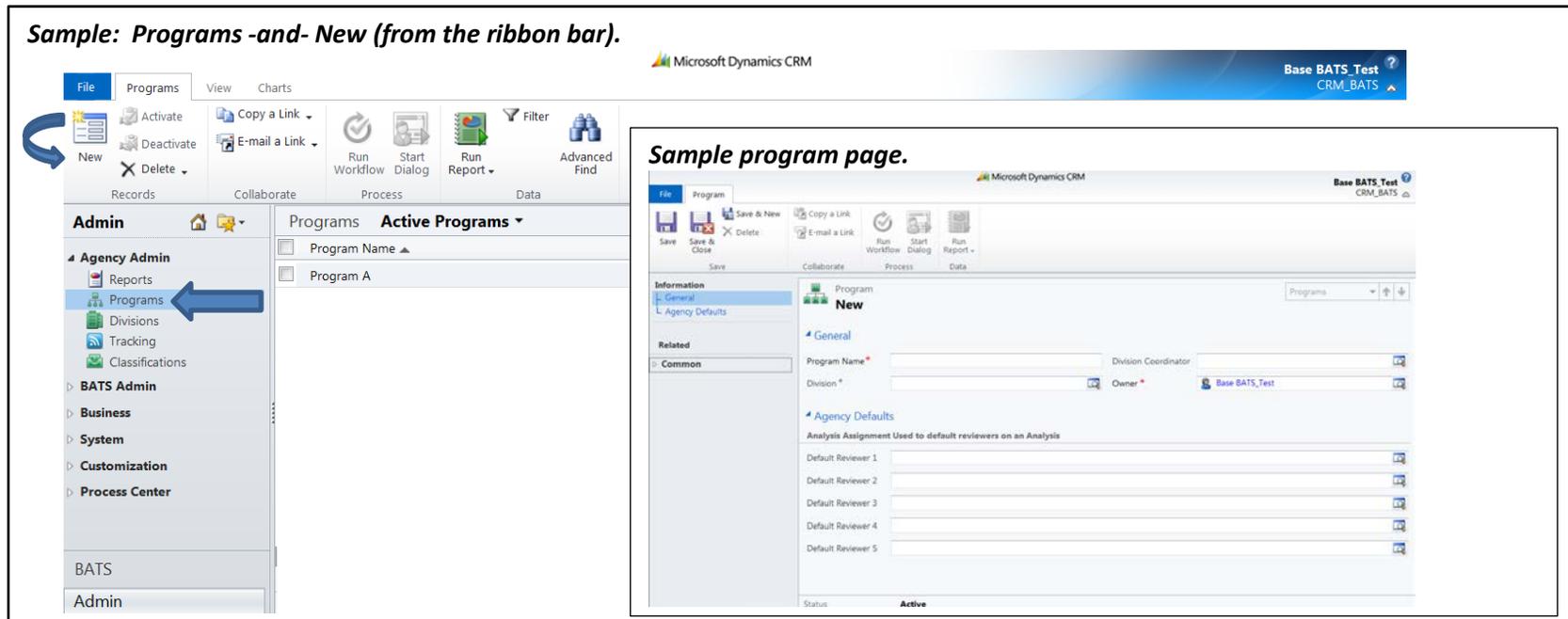
Programs are linked to the agency administrator Business Unit.

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).



The screenshot displays the Microsoft Dynamics CRM interface. On the left, the navigation pane shows the 'Admin' tab selected, with 'Agency Admin' expanded and 'Programs' highlighted by a blue arrow. The main area shows the 'Programs' ribbon with the 'New' button highlighted. Below the ribbon, the 'Programs' list shows 'Program A'. To the right, the 'Sample program page' is shown, which is the 'New' form for a program. The form includes fields for 'Program Name', 'Division', and 'Owner', and a section for 'Agency Defaults' with five 'Default Reviewer' fields. The status is set to 'Active'.

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).

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

Use mouse to left-click on name of program.

click here to view the chart.

Activate (Enable) Program

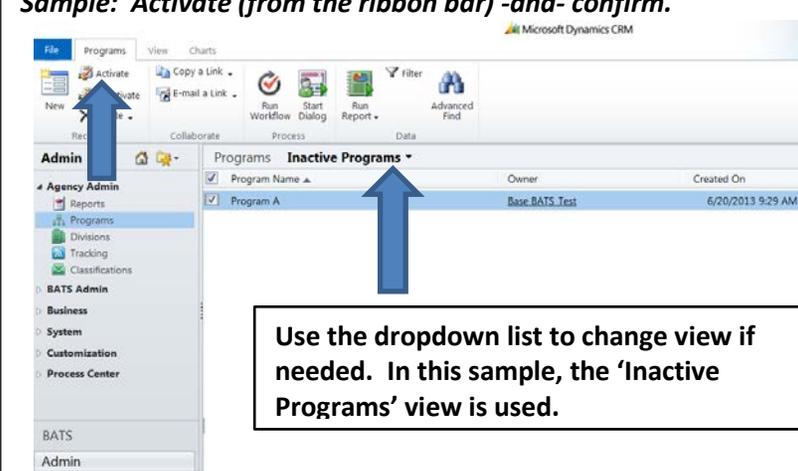
Programs are linked to the agency administrator Business Unit.

To activate (enable) a program:

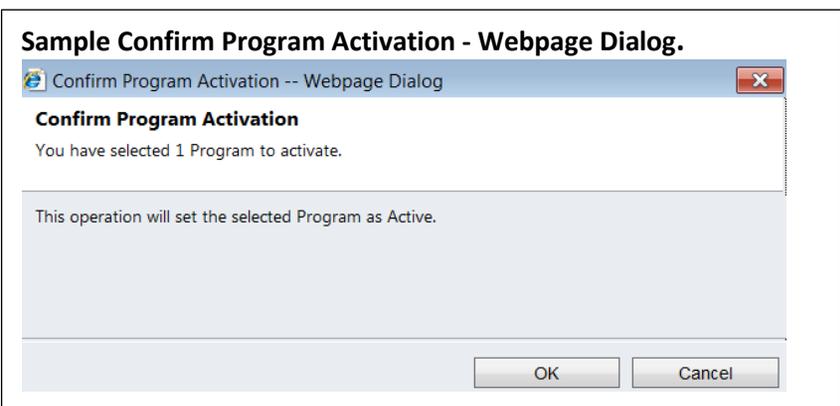
1. **Select:** Admin tab (left-side navigation pane).
2. **Select:** Agency Admin (left-side navigation pane).
3. **Select:** Programs (left-side navigation pane).
4. **Scroll:** To find the program (use the dropdown list to change view if needed).
5. **Select:** Checkbox (next to program name).
6. **Select:** 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.



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

Deactivate (Disable) Program

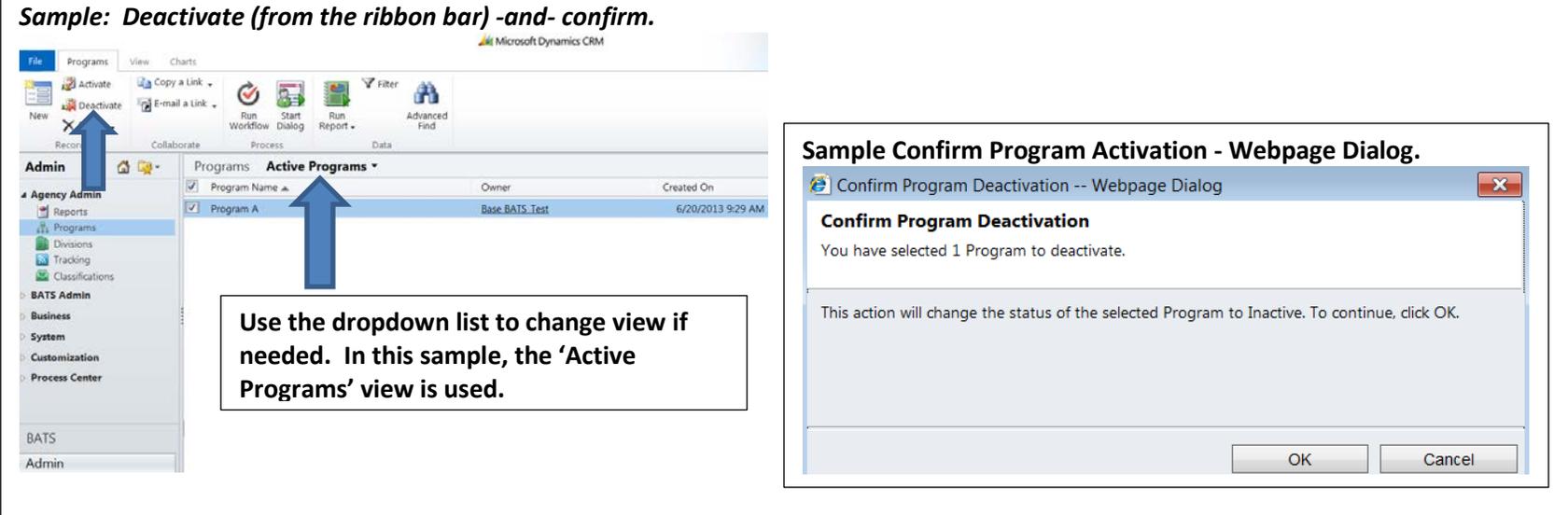
Programs are linked to the agency administrator Business Unit.

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.



The screenshot shows the Microsoft Dynamics CRM interface. On the left, the navigation pane is open to 'Admin' > 'Agency Admin' > 'Programs'. The ribbon bar has the 'Deactivate' button highlighted with a blue arrow. The main area shows a table of 'Active Programs' with one row selected: 'Program A' with owner 'Base.BATS.Test' and created on '6/20/2013 9:29 AM'. A blue arrow points to the 'Active Programs' dropdown menu. A text box below the table says: 'Use the dropdown list to change view if needed. In this sample, the 'Active Programs' view is used.'

Sample Confirm Program Activation - Webpage Dialog.

Confirm Program Deactivation -- Webpage Dialog

Confirm Program Deactivation

You have selected 1 Program to deactivate.

This action will change the status of the selected Program to Inactive. To continue, click OK.

OK Cancel

Divisions

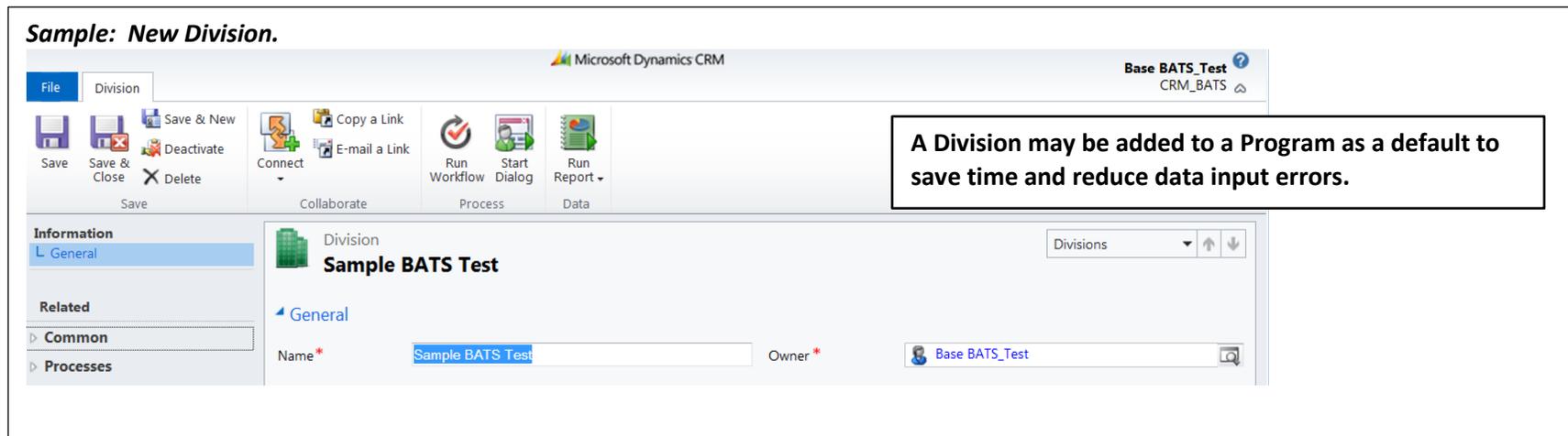
Agencies may associate specific divisions with bill-related information.

- ❖ 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.



The screenshot displays the Microsoft Dynamics CRM interface for creating a new division. The ribbon includes 'File', 'Division', 'Save', 'Collaborate', 'Process', and 'Data'. The 'Information' pane shows the 'General' tab for the 'Sample BATS Test' division. The 'Name' field contains 'Sample BATS Test' and the 'Owner' field is set to 'Base BATS_Test'. A callout box states: "A Division may be added to a Program as a default to save time and reduce data input errors."

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).

The screenshot displays the Microsoft Dynamics CRM interface. On the left, the navigation pane is expanded to 'Admin' > 'Agency Admin' > 'Divisions'. The ribbon bar at the top has the 'New' button highlighted. Below the ribbon, a table lists 'Active Divisions' with columns for 'Name' and 'Created On'. A single entry, 'Sample BATS Test', is listed with a creation date of '7/17/2013 2:44 PM'. An inset window on the right shows the 'Sample BATS Test' division form, with a label 'Sample division page' pointing to the form area. The form includes fields for 'Name' (containing 'Sample BATS Test') and 'Owner' (containing 'Base BATS_Test').

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).

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

Use mouse to left-click on name of division.

Activate (Enable) Division

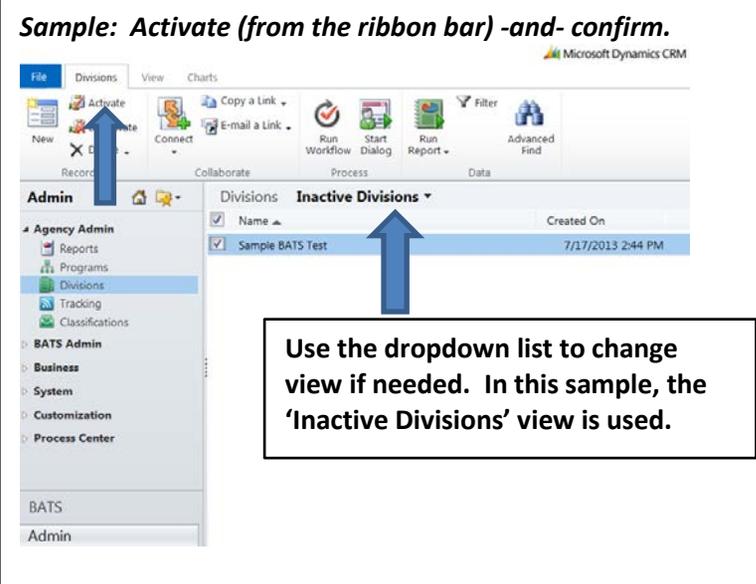
Divisions are linked to the agency administrator Business Unit.

To activate (enable) a division:

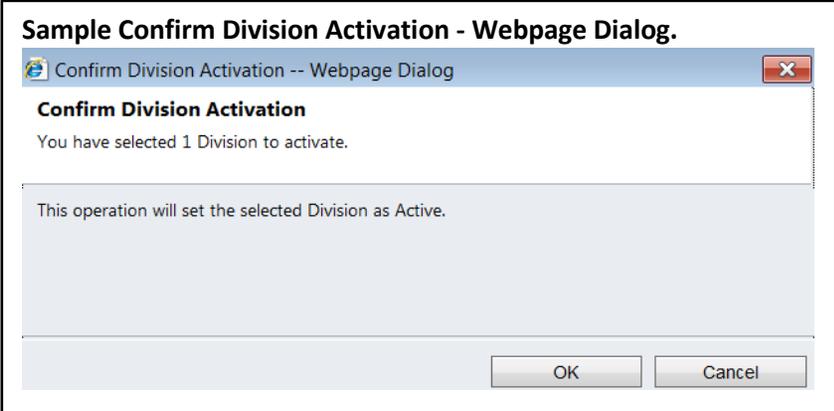
1. **Select:** Admin tab (left-side navigation pane).
2. **Select:** Agency Admin (left-side navigation pane).
3. **Select:** Divisions (left-side navigation pane).
4. **Scroll:** To find the division (use the dropdown list to change view if needed).
5. **Select:** Checkbox (next to division name).
6. **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.



Sample Confirm Division Activation - Webpage Dialog.



Deactivate (Disable) Division

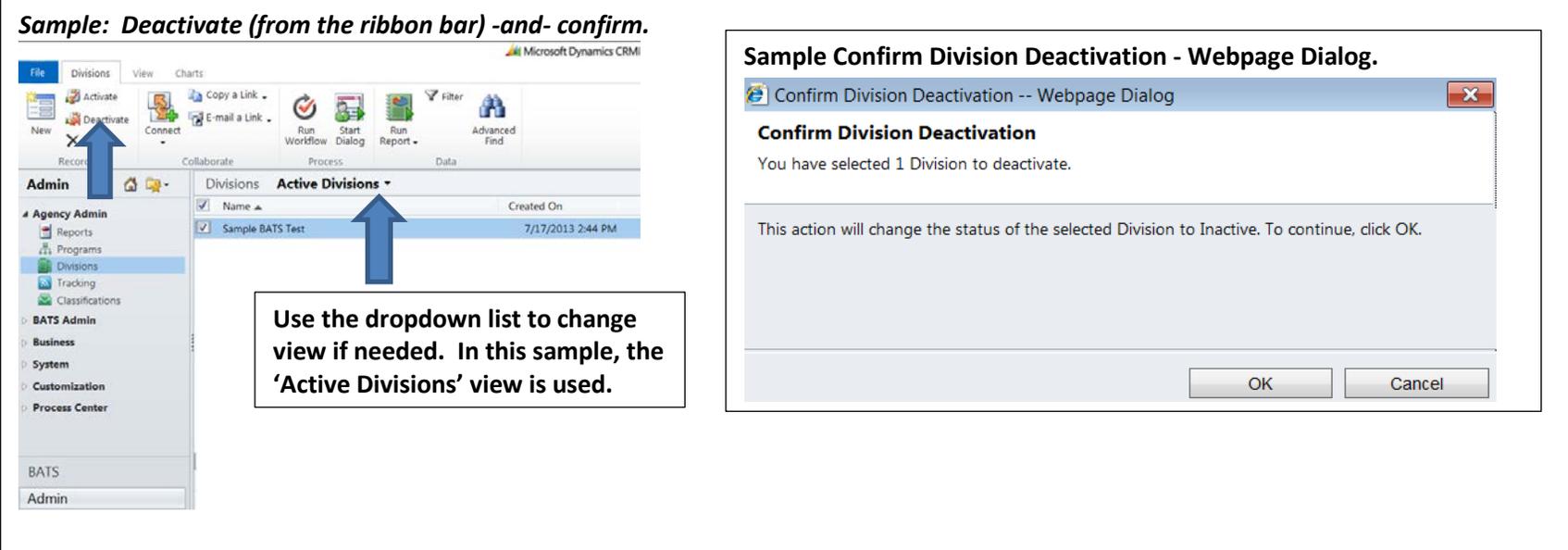
Divisions are linked to the agency administrator Business Unit.

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.



The screenshot shows the Microsoft Dynamics CRM interface. On the left, the 'Admin' navigation pane is expanded to 'Agency Admin' > 'Divisions'. The main area displays the 'Active Divisions' view with a table containing one entry: 'Sample BATS Test' with a checked checkbox and a creation date of '7/17/2013 2:44 PM'. A blue arrow points to the 'Deactivate' button in the ribbon. Another blue arrow points to the 'Active Divisions' dropdown menu. A text box below the table reads: 'Use the dropdown list to change view if needed. In this sample, the 'Active Divisions' view is used.' To the right, a dialog box titled 'Confirm Division Deactivation - Webpage Dialog' is open, showing the text: 'Confirm Division Deactivation. You have selected 1 Division to deactivate. This action will change the status of the selected Division to Inactive. To continue, click OK.' The dialog has 'OK' and 'Cancel' buttons.

Classifications

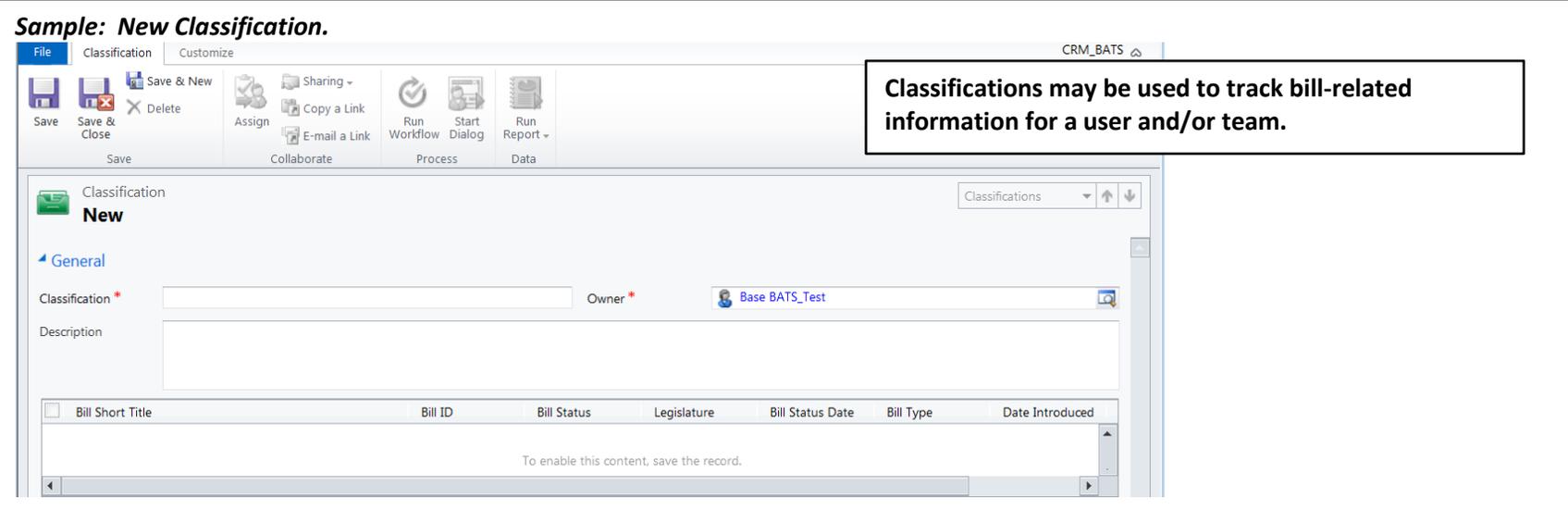
Agencies may associate specific classifications with bill-related information.

- ❖ 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.

Bill Short Title	Bill ID	Bill Status	Legislature	Bill Status Date	Bill Type	Date Introduced
To enable this content, save the record.						

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).

The screenshot displays the Microsoft Dynamics CRM interface. On the left, the navigation pane is expanded to 'Admin', with 'Classifications' selected. The ribbon bar at the top has the 'New' button highlighted. The main content area shows the 'New Classification' form. The 'Classification' field is empty, and the 'Owner' field is set to 'Base BATS_Test'. Below the form is a table with the following columns: Bill Short Title, Bill ID, Bill Status, Legislature, Bill Status Date, Bill Type, and Date Introduced. A text box at the bottom of the table reads 'To enable this content, save the record.' A box labeled 'Sample classification page.' is overlaid on the form area.

Edit (Update) Classification

Classifications are linked to the agency administrator Business Unit.

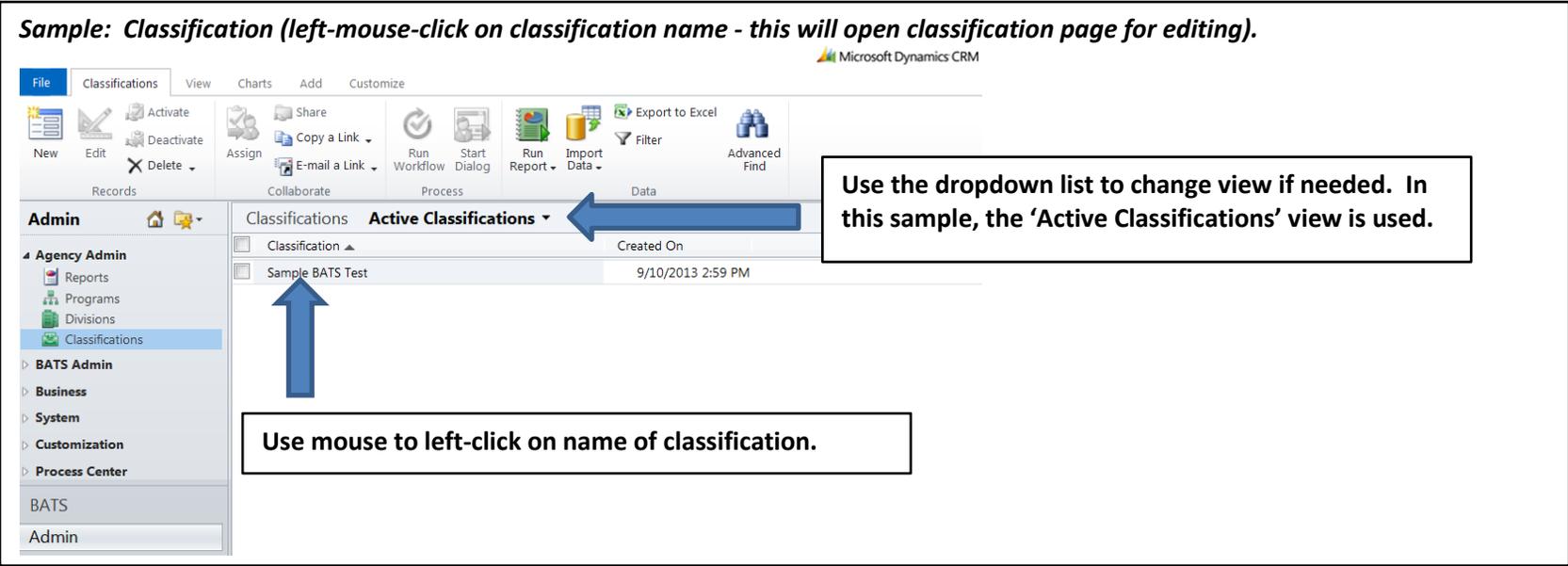
❖ Classifications may be used to track bill-related information for a user and/or team.

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).



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

Use mouse to left-click on name of classification.

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).

Use mouse to left-click anywhere within the Bills section.

Use dropdown to change view if needed.

In this sample, the checkbox next to 'Sample BATS Test' bill was selected and 'Add' was selected.

Activate (Enable) Classification

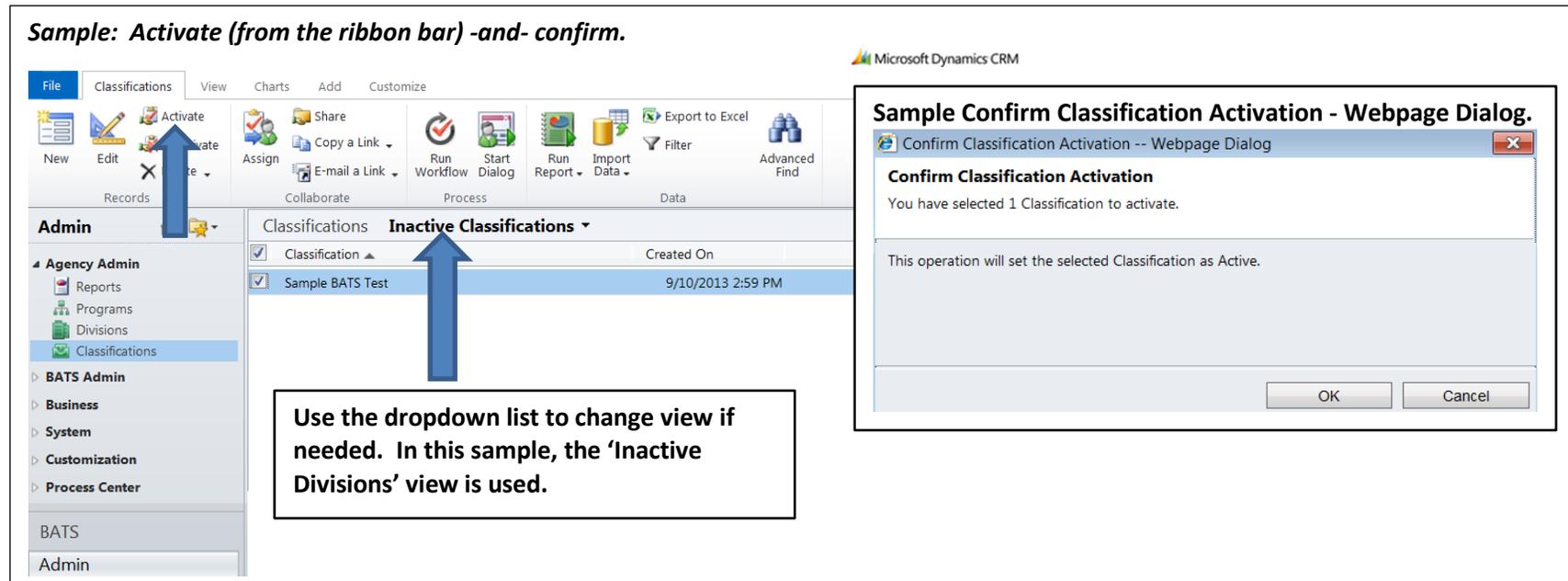
Classifications are linked to the agency administrator Business Unit.

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.



The screenshot displays the Microsoft Dynamics CRM interface. The left navigation pane shows the 'Admin' tab selected, with 'Agency Admin' > 'Classifications' chosen. The ribbon bar has the 'Inactive Classifications' view selected. A table lists classifications, with 'Sample BATS Test' selected and checked. A dialog box titled 'Sample Confirm Classification Activation - Webpage Dialog' is open, displaying the message: 'Confirm Classification Activation. You have selected 1 Classification to activate. This operation will set the selected Classification as Active.' with 'OK' and 'Cancel' buttons.

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

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.

The screenshot displays the Microsoft Dynamics CRM interface. On the left, the navigation pane shows 'Admin' > 'Agency Admin' > 'Classifications'. The ribbon bar has the 'Deactivate' button highlighted. The main area shows a table of 'Active Classifications' with columns for 'Classification' and 'Created On'. The row 'Sample BATS Test' is selected, and its checkbox is checked. A blue arrow points from the 'Deactivate' button to the 'Sample BATS Test' row. Another blue arrow points from the 'Active Classifications' dropdown menu to the same row. A text box below the table reads: 'Use the dropdown list to change view if needed. In this sample, the 'Active Classifications' view is used.'

On the right, a dialog box titled 'Sample Confirm Classification Deactivation - Webpage Dialog' is open. It contains the text: 'Confirm Classification Deactivation' and 'You have selected 1 Classification to deactivate.' Below this, it states: 'This action will change the status of the selected Classification to Inactive. To continue, click OK.' At the bottom of the dialog are 'OK' and 'Cancel' buttons.