The Bill Analysis and Tracking System (BATS) provides the ability to electronically create, maintain, and submit 'agency request' legislation.

- Security protocols ensure that individual agencies own and control access to their information.

This document provides an overview of agency request functions, including:

- Manage agency request. *Note: details for creating new agency request and completing the Input, Analysis, Review, and Submit process are included in separate user reference materials.*
- View agency request.
- Update (modify) agency request.
- Assign agency request.
- Share agency request.
- Withdraw agency request.

Manage Agency Requests
The ability to manage agency requests is based on the business unit associated with the 'owner' of the agency request. This helps to ensure that individual agencies own and control access to their information

The checklist for agency packets will be displayed when an agency selects 'submit'. BATS will first check to ensure all required fields are complete.

- ❖ If all required* fields are not complete, then BATS will display an error message with list of required* fields.
- ❖ If all required* fields are complete, then BATS will display the checklist for agency requests.

Manage Agency Request	Process Overview	Additional Info
Input	❖ Input general information. ❖ Connect contacts. ❖ Assign preparer for analysis.	Starting point for agency request packet. ❖ Agency request may be saved without connecting contacts and/or assigning preparer for analysis. ❖ Preparer for analysis is the person who will add one or more agency analysis records so that other agency users can provide their analysis of the request.
Analysis	❖ Add new analysis. ❖ Assign reviewers (for analysis). ❖ Select 'start analysis' and input information to answer questions when prompted. ❖ Edit and format analysis information.	Starting point for agency analysis. ❖ This analysis is for internal agency use. Information on the agency analysis is not available to OFM unless the agency uses the 'share' function in BATS. ❖ When 'start analysis' is selected, the system prompts for information using a question/answer format. This provides an easy way to provide analysis of the agency request. ❖ After the analysis is provided, it can be edited/formatted if needed.

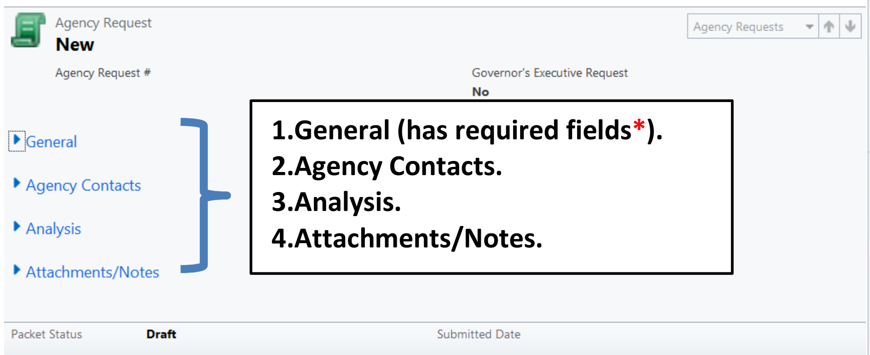
Manage Agency Requests (continued)

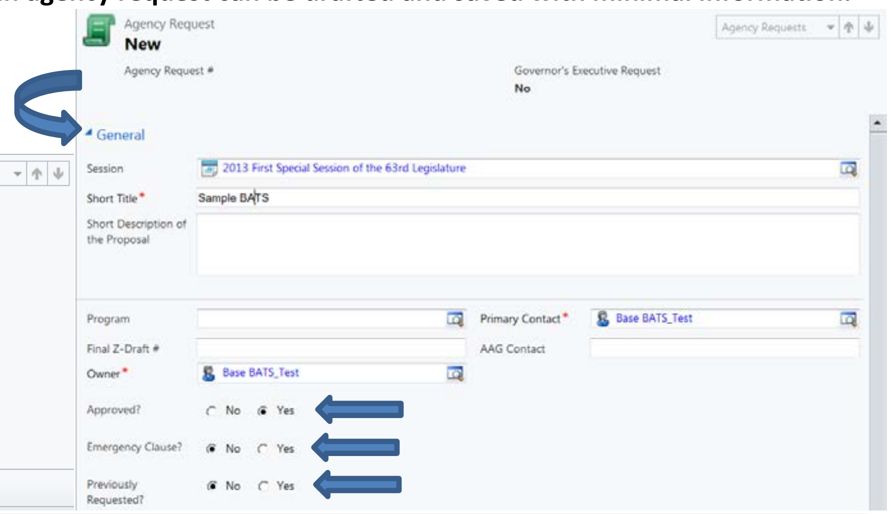
Manage Agency Request	Process Overview	Additional Info
Review	Prepare for Agency Review: ❖ Add review task details. ❖ Add notes and/or attachments for analysis reviewers. ❖ Select 'ready for review'. Agency Review: ❖ Generate Summary. ❖ Review analysis. ❖ Update analysis (if needed). ❖ Select 'mark complete' (reviewer task status). ❖ Select 'complete' (all reviews complete).	Starting point for agency review. ❖ Additional reviewers and/or details may be added in the 'task details' section of the analysis. ❖ Analysis and notes/attachments will be available to agency reviewer(s) and can be updated if needed. ❖ Analysis details, notes and/or attachments are for internal agency use. Information on the agency analysis is not available to OFM unless the agency uses the 'share' function.
Submit	❖ Select 'submit'.	Starting point for agency submit. ❖ Final step to ensure agency packet is ready to submit to OFM for next steps. ❖ Checklist for agency packets will be displayed when an agency selects 'submit'. ❖ The notes and/or attachments on the agency request page will be available for OFM use when the 'submit' process is completed.
Withdraw	❖ Select 'withdraw'.	Agency requests may be withdrawn if the request has been submitted to OFM for review. ❖ This function should be used as an exception process only. BATS does not currently generate a notice to inform OFM and/or internal contacts that the request has been withdrawn.

Manage Agency Requests (continued)

The ability to manage agency requests is based on the business unit associated with the 'owner' of the agency request. This helps to ensure that individual agencies own and control access to their information.

Sample: **Agency Requests are initially separated into 4 sections. The General section includes fields that are required* to save the agency request. During the 'submit' process, additional fields will be required. The system will prompt for these additional fields during the 'submit' process but not during the initial 'save' process so that an agency request can be drafted and saved with minimal information.**





- **If Approved = No, then BATS will display prompt with required field*.**
- **If Emergency Clause = Yes, then BATS will display prompt with required field*.**
- **If Previously Requested= Yes, then BATS will display prompt with required field*.**

Access Agency Requests

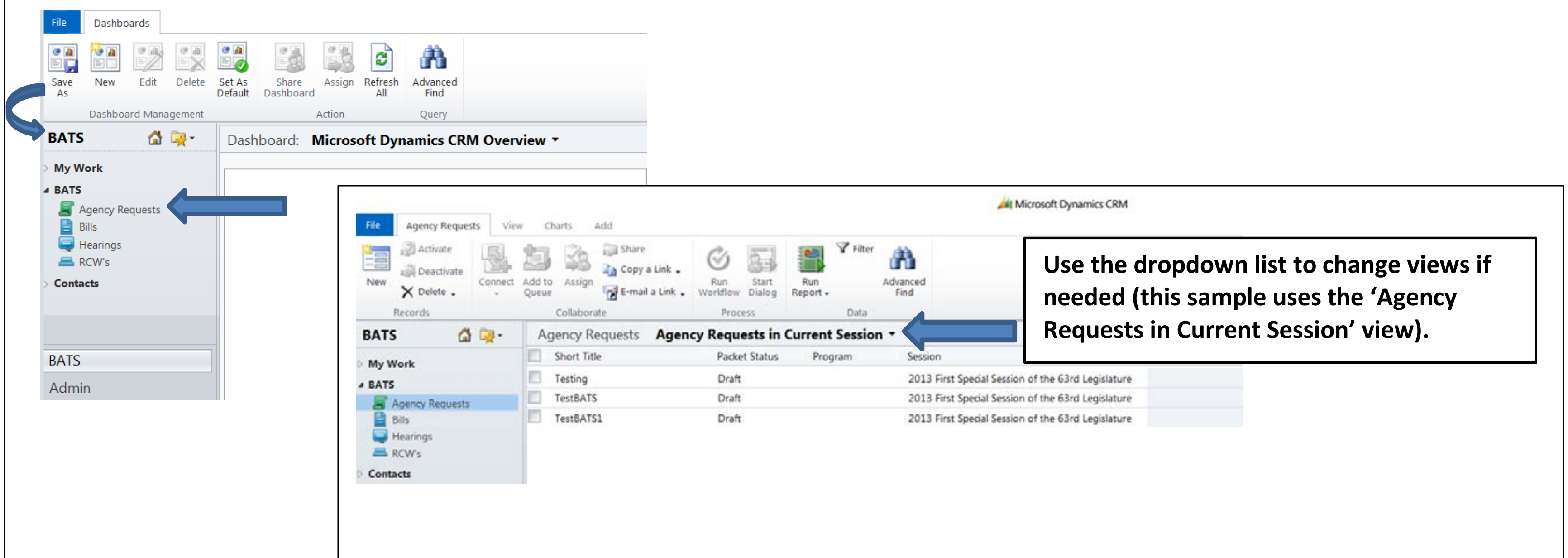
Agency requests are available from the BATS tab in the left side navigation pane.

To access agency requests:

1. **Select:** BATS tab (left side navigation pane).
2. **Select:** BATS (left side navigation pane).
3. **Select:** Agency Requests (left side navigation pane).

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

Sample: Agency Requests (left side navigation pane) –and- list of agency requests.



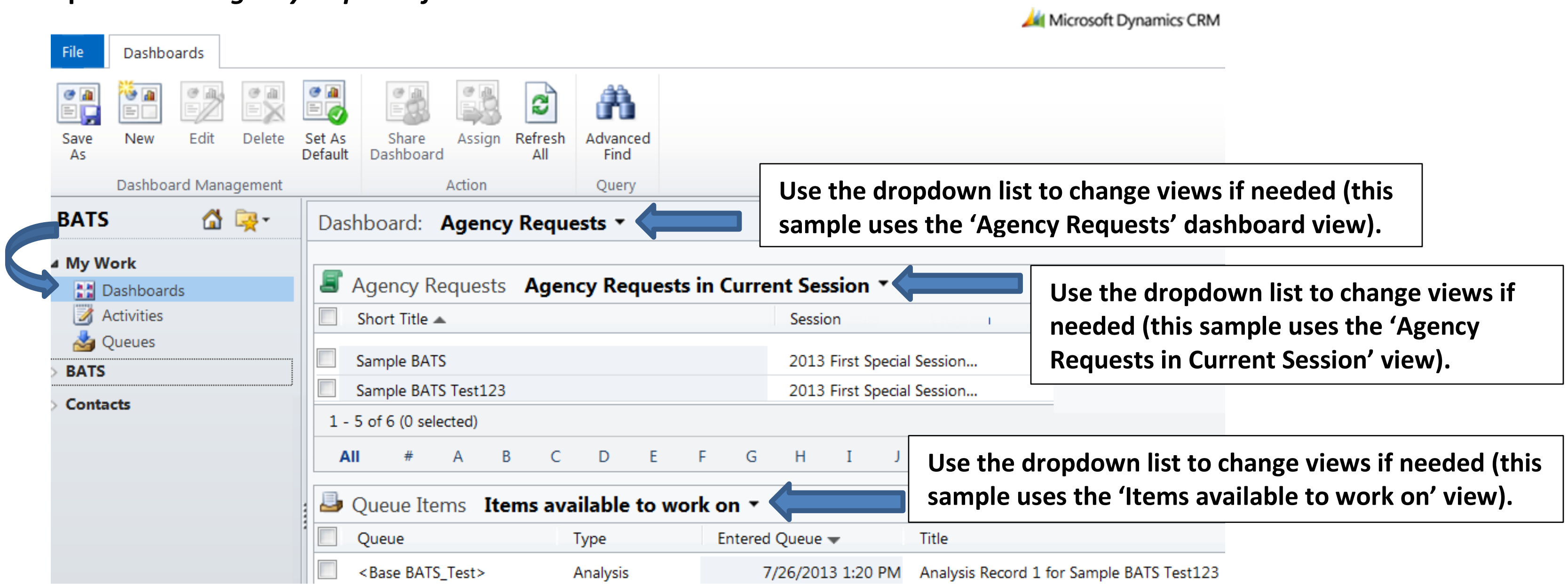
Access Agency Requests (continued)
Agency requests are available from some of the BATS dashboards.

To access agency requests from a dashboard:

1. **Select:** BATS tab (left side navigation pane).
2. **Select:** My Work (left side navigation pane).
3. **Select:** Dashboards (left side navigation pane).
4. **Select:** Agency Request (use mouse to left-click on agency name or title).

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

Sample: ***access agency requests from dashboard views.***



View (Display) Agency Requests

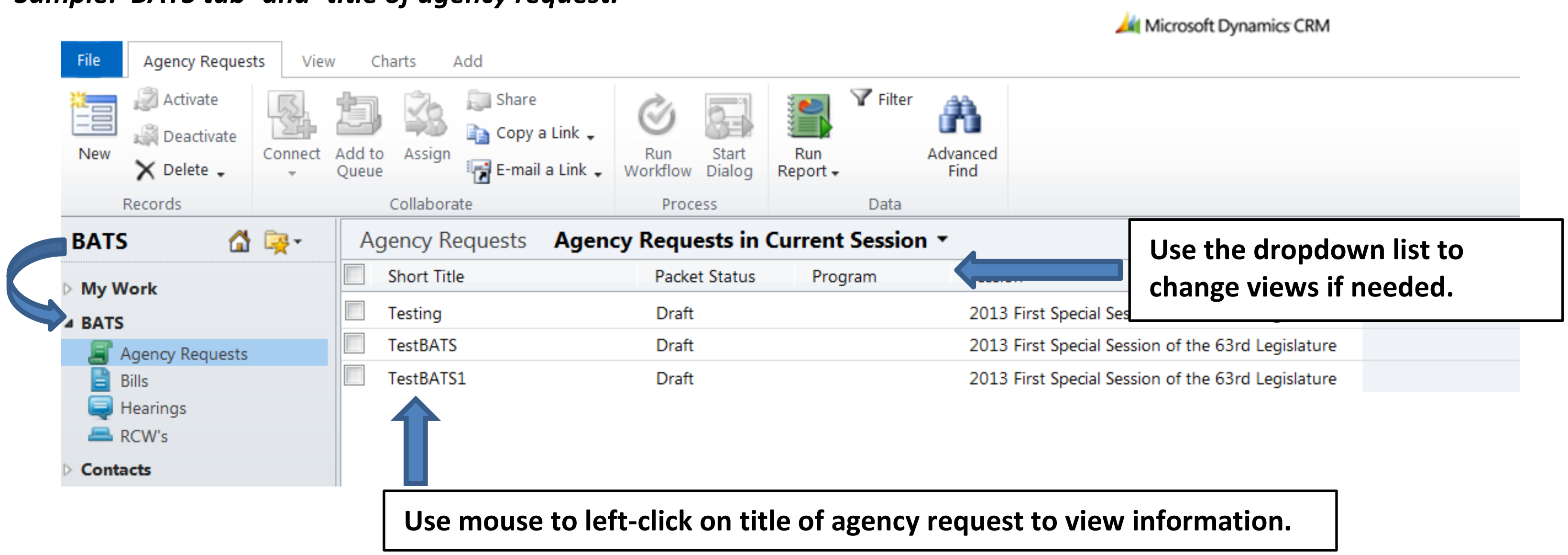
The ability to view (display) agency requests is based on the business unit associated with the 'owner' of the agency request. This helps to ensure that individual agencies own and control access to their information.

To view (display) agency request information:

1. **Select:** BATS tab (left side navigation page).
2. **Select:** BATS (left side navigation pane).
3. **Select:** Agency Requests (left side navigation pane).
4. **Scroll**: To find the agency request (use the dropdown list to change views if needed).
5. **Select**: Title of agency request (left-mouse-click on the agency title).

☑**Result**: Agency Request 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- title of agency request.



Update (Modify) Agency Request

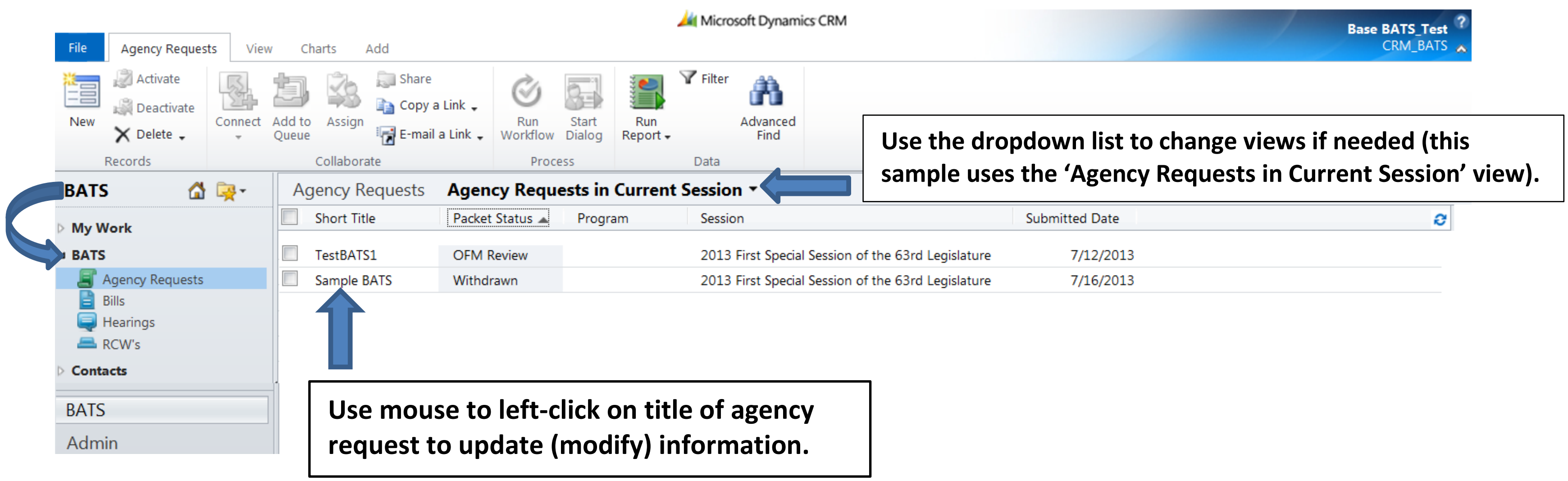
The agency request will be linked to the business unit associated with the 'owner' of the agency request.

To update (modify) an agency request from the BATS tab (left-side navigation pane):

1. **Select:** Agency Requests (left side navigation pane).
2. **Scroll**: To find the agency request (use the dropdown list to change view if needed).
3. **Select**: Title of agency request (left-mouse-click on the agency title).
4. **Input:** Information about the agency request.
5. **Select:** Save.

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

Sample: Agency Requests -and- use mouse to left click on title of agency request.



Assign Agency Request

The agency request will be linked to the business unit associated with the 'owner' of the agency request.

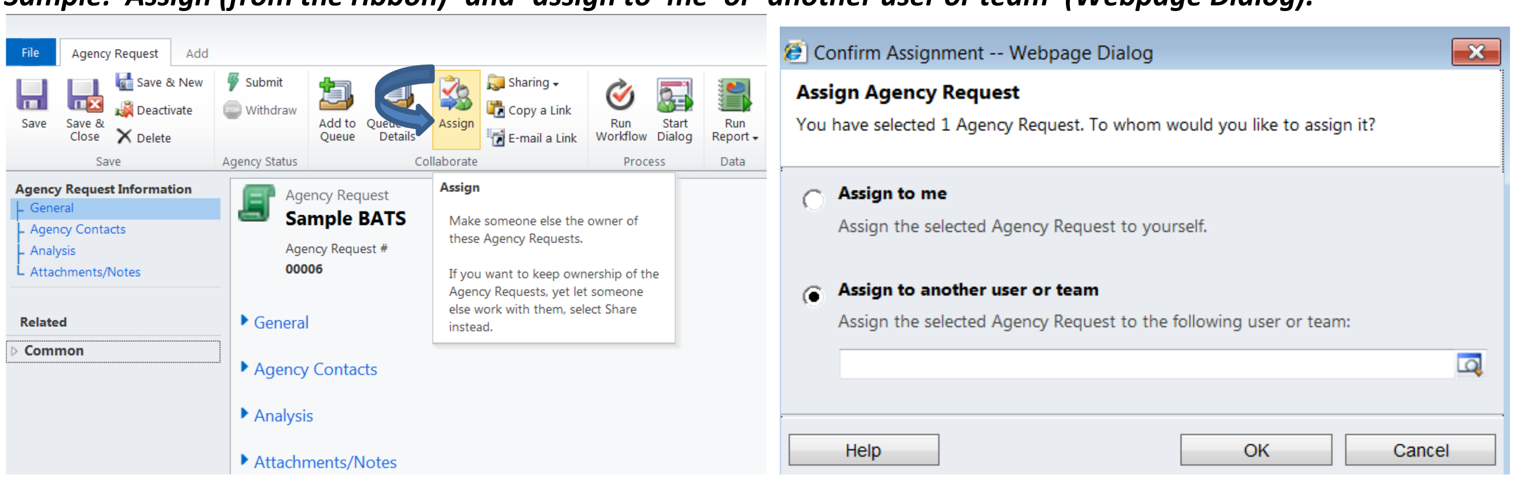
❖ The Assign function from the ribbon bar may also be used on other pages. For example, an agency analysis may be assigned to another user.

To assign an agency request from the BATS tab (left-side navigation pane):

1. **Select:** Agency Requests (left side navigation pane).
2. **Scroll**: To find the agency request to be updated (use the dropdown list to change view if needed).
3. **Select**: Title of agency request (left-mouse-click on the agency title).
4. **Select:** Assign (from the ribbon bar).
1. **Select:** Assign to 'me' or 'another user or team'. The system will prompt for values using Look Up if needed. Note: Teams will be covered in BATS Phase 2 training.
5. **Select:** OK (in the Confirm Assignment – Webpage Dialog).

☑**Result**: Agency Request is assigned (the 'owner' is updated). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Assign (from the ribbon) -and- assign to 'me' or 'another user or team' (Webpage Dialog).



Share Agency Request

The agency request will be linked to the business unit associated with the 'owner' of the agency request.

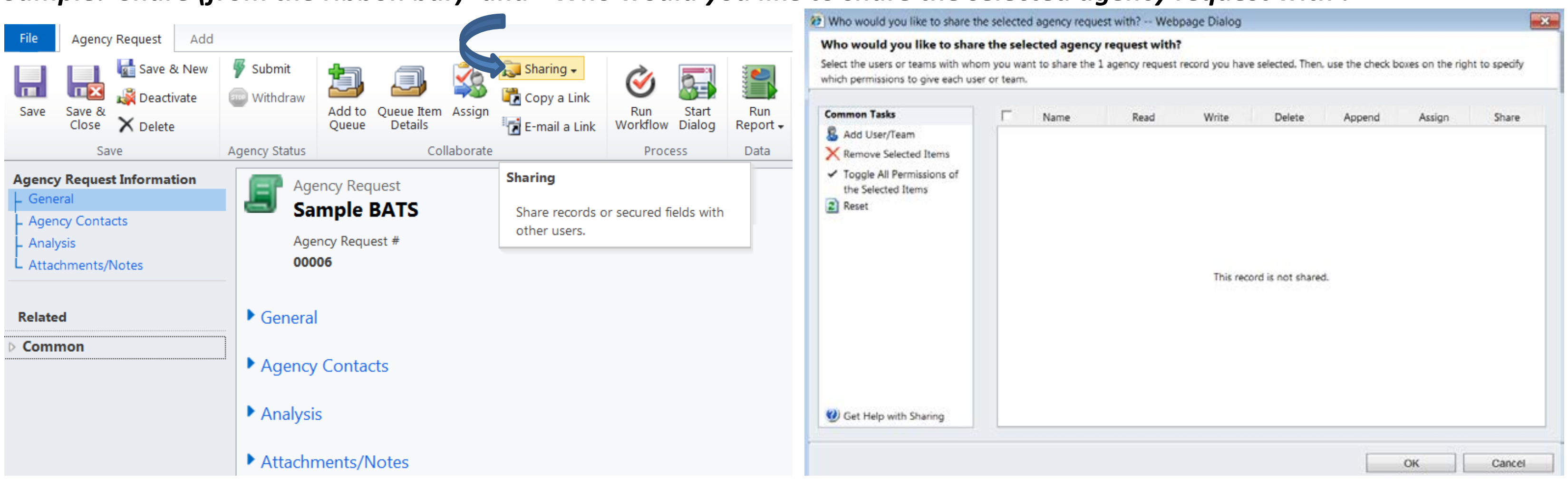
❖ The Share function from the ribbon bar may also be used on other pages. For example, an agency analysis may be shared with another user.

To share an agency request from the BATS tab (left-side navigation pane):

1. **Select:** Agency Requests (left side navigation pane).
2. **Scroll**: To find agency request to be shared (use the dropdown list to change view if needed).
3. **Select**: Title of agency request (left-mouse-click on the agency title).
4. **Select:** Sharing (from the ribbon bar).
5. **Select:** Share (dropdown value for Sharing from the ribbon bar).

☑**Result**: 'Who would you like to share the selected agency request with' – Webpage Dialog is displayed. 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 share the agency request.

Sample: Share (from the ribbon bar) -and- 'Who would you like to share the selected agency request with'.



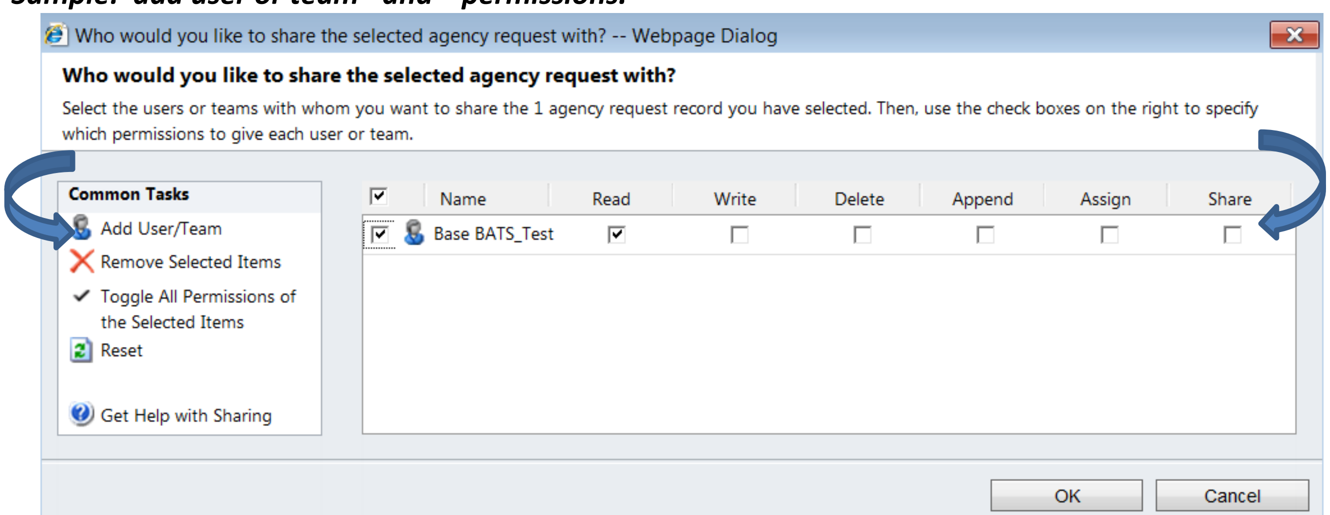
Share Agency Request (continued)

To select the user (or team) to share an agency request (from the Who would you like to share the selected agency request with' – Webpage Dialog):

1. **Select:** Add User/Team (to share agency request). Note: Teams will be covered in BATS Phase 2 training.
2. **Scroll:** To find user or team.
3. **Select:** Checkbox (next to name of user or team). Note: select more than one checkbox if needed.
4. **Select:** Add (under Selected records).
5. **Select:** OK. The user (or team) will be displayed on the 'Who would you like to share the selected agency request with' – Webpage Dialog.
6. **Select:** Checkbox (to specify which permissions to given the user or team). Note: select more than one checkbox if needed.
7. **Select:** OK.

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

Sample: add user or team –and—permissions.



Withdraw Agency Request

Agency requests may be withdrawn if the request has been submitted to OFM for review. The agency request will be linked to the business unit associated with the 'owner' of the agency request.

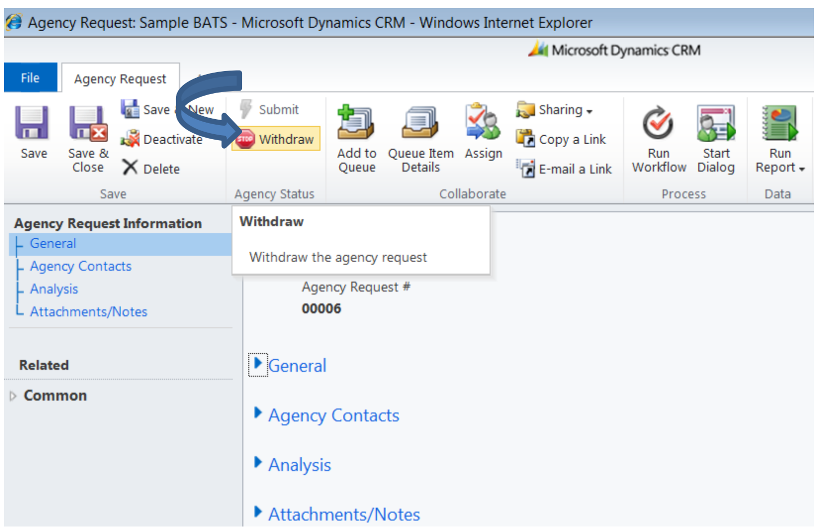
❖ This function should be used as an exception process only. BATS does not currently generate a notice to inform OFM and/or internal contacts that the request has been withdrawn.

To withdraw an agency request from the BATS tab (left-side navigation pane):

1. **Select:** Agency Requests (left side navigation pane).
2. **Scroll**: To find agency request (use the dropdown list to change view if needed to narrow the list of contacts).
3. **Select**: Title of agency request (left-mouse-click on the agency title).
4. **Select:** Withdraw (from the Agency Status group on the Ribbon bar).
5. **Select:** OK (in the Confirm Assignment – Webpage Dialog).

☑**Result**: Agency Request is withdrawn (the packet status is updated to 'Withdrawn'). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Withdraw an agency request (from the ribbon bar).



The Bill Analysis and Tracking System (BATS) provides the ability to electronically create, maintain, and submit 'agency request' legislation.

- Security protocols ensure that individual agencies own and control access to their information.

This document provides an overview of agency request functions, including:

- Manage agency request input.
- Manage agency request analysis.
- Manage agency request review.
- Manage agency request submit.

Manage Agency Requests – Input, Analysis, Review, and Submit

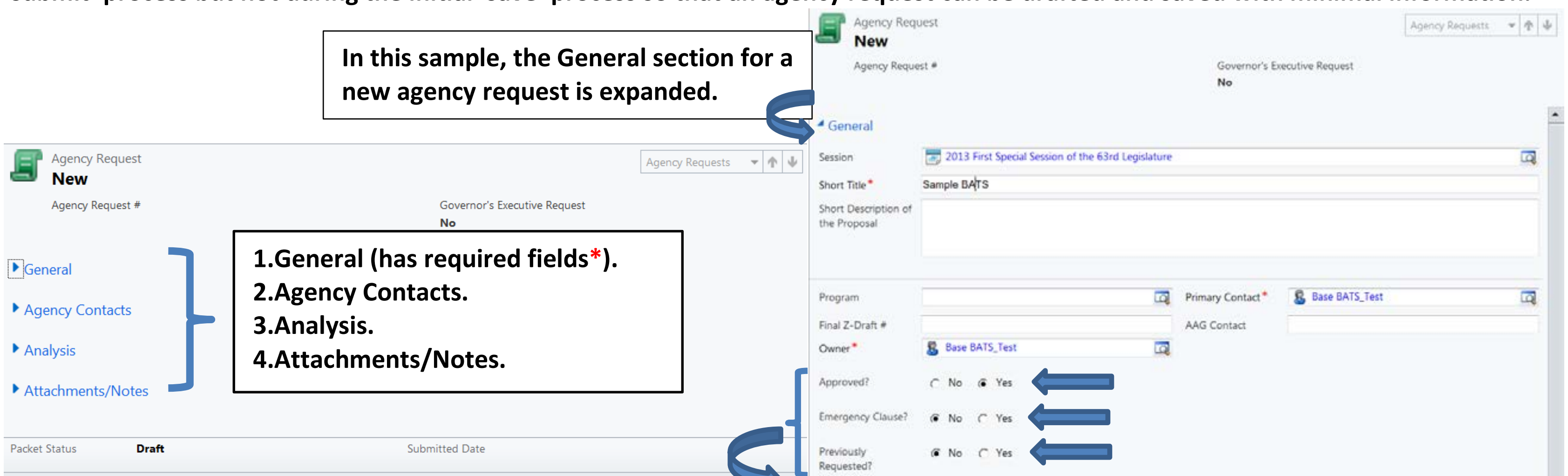
The ability to manage agency requests is based on the business unit associated with the 'owner' of the agency request. This helps to ensure that individual agencies own and control access to their information.

Manage Agency Request – Input Starting point for agency request packet. ❖ Input general information. ❖ Connect contacts. ❖ Assign preparer for analysis.	**Manage Agency Request – Analysis** Starting point for agency analysis. ❖ Add new analysis. ❖ Assign reviewers. ❖ Select 'start analysis' and input information to answer questions when prompted. ❖ Edit and format analysis information. ❖ Add notes and/or attachments to the analysis.

Manage Agency Request – Review
Starting point for agency review.
❖ Update review task details.
❖ Select 'ready for review'.
❖ Select 'generate summary'.
❖ Review analysis.
❖ Update analysis (if needed).
❖ Select 'mark complete' (reviewer task status).
❖ Select 'complete' (all reviews complete).
❖ Add attachments and/or notes to the agency request (for OFM review).
	Manage Agency Request – Submit
	Starting point for agency submit.
	❖ Select 'submit'.
	❖ The checklist for agency packets will be displayed when an agency selects 'submit'. BATS will first check to ensure all required fields are complete.
	    ❖ If all required* fields are not complete, then BATS will display an error message with list of required* fields.
	    ❖ If all required* fields are complete, then BATS will display the checklist for agency requests.

Manage Agency Requests - Input, Analysis, Review, and Submit (continued)
The ability to manage agency requests is based on the business unit associated with the 'owner' of the agency request. This helps to ensure that individual agencies own and control access to their information.

Sample*:* Agency Requests are initially separated into 4 sections. The General section includes fields that are required* to save the agency request. During the 'submit' process, additional fields will be required. The system will prompt for these additional fields during the 'submit' process but not during the initial 'save' process so that an agency request can be drafted and saved with minimal information.



- **If Approved = No, then BATS will display prompt with required field*.**
- **If Emergency Clause = Yes, then BATS will display prompt with required field*.**
- **If Previously Requested= Yes, then BATS will display prompt with required field*.**

Manage Agency Request - Input, Analysis, Review, and Submit (continued)

Information required to input (add) and save a new agency request is minimal because it is used as a starting point in the process.

❖ The following information is required to input (add) and save a new agency request.

Required Field*	Value	Additional Information
Short Title*	Provided by the agency.	Free-form field for agency use.
Primary Contact*	User Name (agency user).	Defaults to User Name of agency user who added the agency request. ❖ May be changed to another User Name if needed (e.g., an agency administrator may add an agency request and then change Owner Name to another agency user).
Owner*	User Name (agency user).	Defaults to User Name of agency user who added the agency request. ❖ May be changed to another User Name if needed (e.g., an agency administrator may add an agency request and then change Owner Name to another agency user).
Reason For Not Approving*	Provided by the agency.	Free-form field for agency use. ❖ This field will be displayed if the 'No' button is selected on Agency Request Approved in the General section.
Emergency Clause Effective Date*	Date is provided by the agency.	Use the calendar icon to select a date. ❖ Date may be input directly using format of MM/DD/YYYY (Example: 7/4/2013 or 12/31/2013). ❖ Field will only be displayed if the 'Yes' button is selected on Agency Request Emergency Clause in the General section.
Emergency Clause Justification*	Provided by the agency.	Free-form field for agency use. ❖ Field will only be displayed if the 'Yes' button is selected on Agency Request Emergency Clause in the General section.
Prior Draft and/or Bill # and Year*	Provided by the agency.	Free-form field for agency use. ❖ Field will only be displayed if the 'Yes' button is selected on Agency Request Previously Requested in the General section.
What Has Changed Since the Previous Request*	Provided by the agency.	Free-form field for agency use. ❖ Field will only be displayed if the 'Yes' button is selected on Agency Request Previously Requested in the General section.

Manage Agency Request – Input, Analysis, Review, and Submit (continued)
Additional information is required to submit an agency request to OFM. Note: these fields are not identified with a red asterisk '*' because they are not required to input (add) and save a new agency request.

The checklist for agency packets will be displayed when an agency selects 'submit'. BATS will first check to ensure all required fields are complete.
- ❖ If all required fields are not complete, then BATS will display an error message.
- ❖ If all required fields are complete, then BATS will display the checklist.

The following information is required to submit an agency request to OFM.

Required Information to 'Submit' Agency Request to OFM	Value	Additional Information
AAG	Provided by the agency.	Free-form field for agency use. ❖ Agency Attorney General contact name.
Short Description of the Proposal	Provided by the agency.	Free-form field for agency use.
Final Z-Draft #	Provided by the code reviser office.	Valid format is Z-4digit.1digit. ❖ Example: Z-0001.1.
Session	Date and Description of the Legislative Session.	Defaults to most current session available. ❖ Use Look Up to select a different session (Look Up function will prompt for additional values if needed).

Add (Input) New Agency Request

The agency request will be linked to the business unit associated with the 'owner' of the agency request.

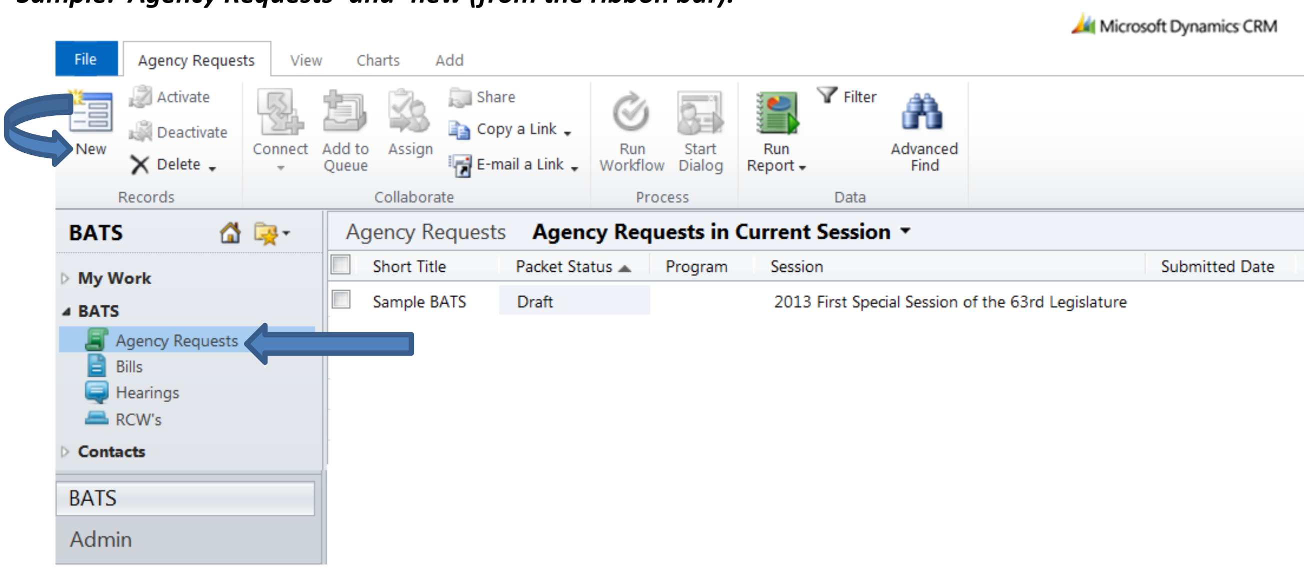
❖ Information required to input (add) and save a new agency request is minimal because it is used as a starting point in the process.

To add an agency request from the BATS tab (left-side navigation pane):

1. **Select:** Agency Requests.
2. **Select**: New (from the ribbon bar).
3. **Input:** Information about the agency request. Required fields are marked with *.
4. **Select:** Save.

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

Sample: Agency Requests -and- new (from the ribbon bar).



Update (Modify) Agency Request

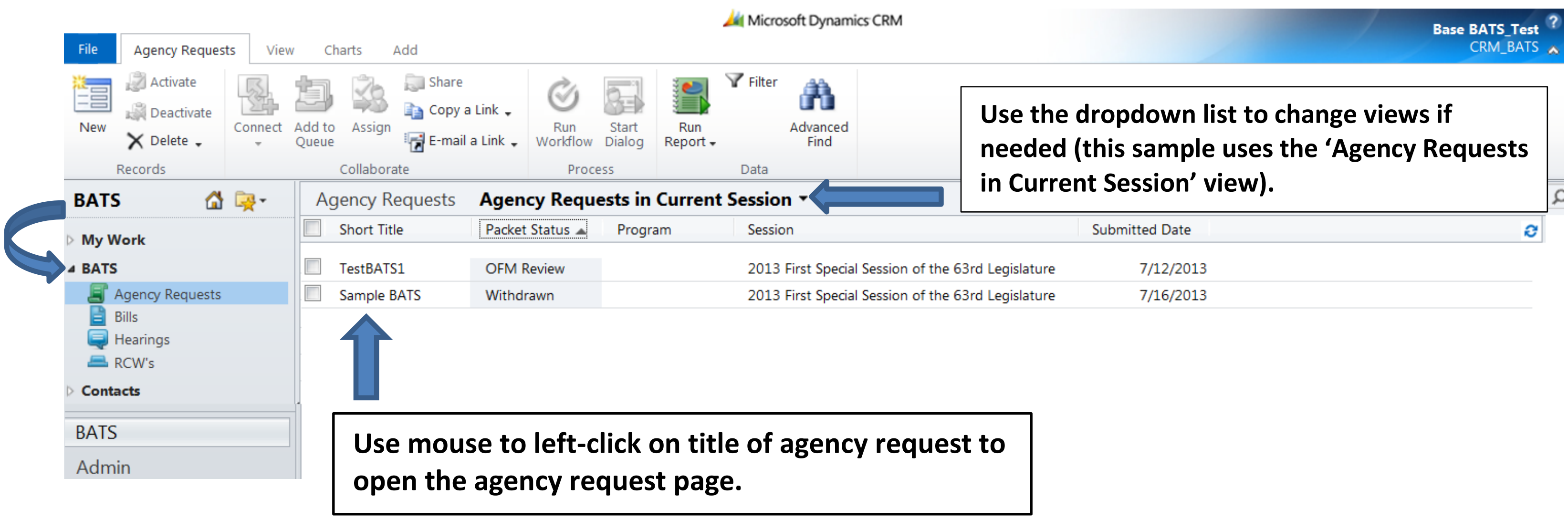
The agency request will be linked to the business unit associated with the 'owner' of the agency request.

To update (modify) an agency request from the BATS tab (left-side navigation pane):

1. **Select:** Agency Requests (left side navigation pane).
2. **Scroll**: To find the agency request (use the dropdown list to change view if needed).
3. **Select**: Title of agency request (left-mouse-click on the agency title).
4. **Input:** Information about the agency request.
5. **Select:** Save.

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

Sample: Agency Requests -and- use mouse to left click on title of agency request.



Connect Agency Contacts

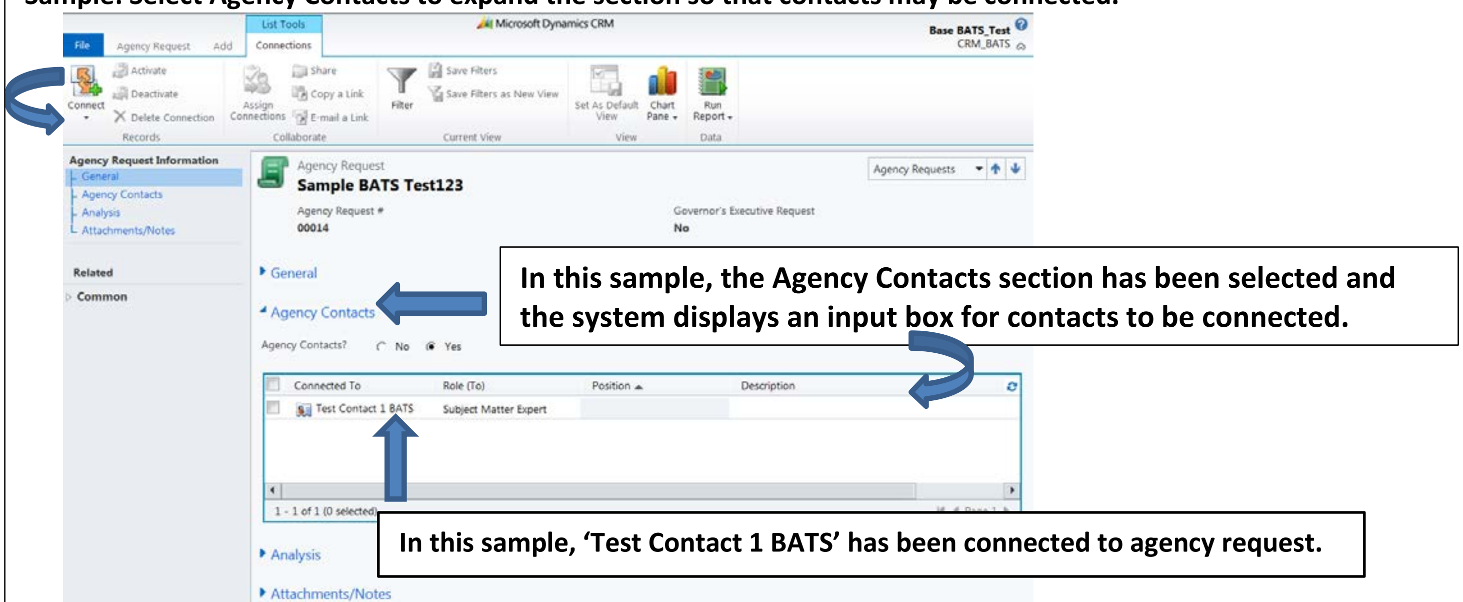
Contacts may be associated (connected) with an agency request. The agency request will be linked to the business unit associated with the 'owner' of the agency request.

To connect contacts to an agency request:

1. **Select:** Agency Requests (left side navigation pane).
2. **Scroll**: To find the agency request (use the dropdown list to change view if needed).
3. **Select**: Title of agency request (left-mouse-click on the agency title).
4. **Select:** Agency Contacts section within the agency request.
5. **Select:** Yes (agency contacts will be connected to the agency request).

☑**Result**: The system will display an input box for contacts to be connected. If the agency request has not yet been saved, the input box will display a message 'To enable this content, save the record'. The agency request needs to be saved so that contacts may be connected. ➔**Note:** Additional steps are needed to connect agency contacts.

Sample: Select Agency Contacts to expand the section so that contacts may be connected.



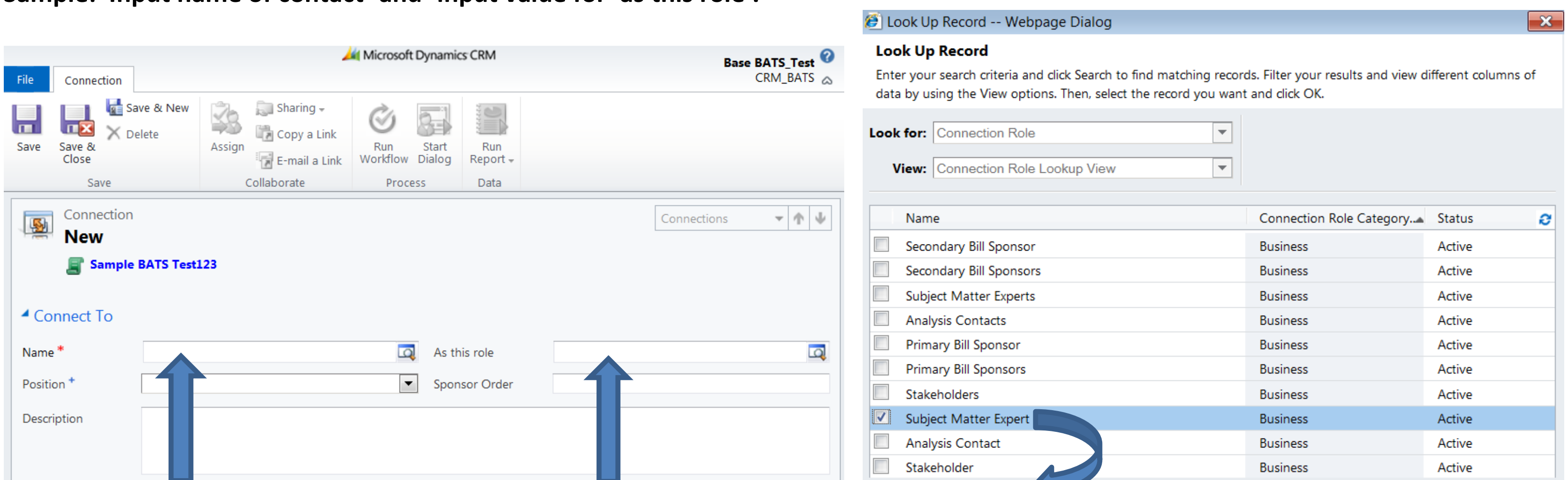
Connect Agency Contacts (continued)

To continue steps needed to connect agency contacts to an agency request:

1. **Select:** Connect (from the ribbon). The connect function will not be displayed on the ribbon if the agency request has not yet been saved.
2. **Input:** Information about the contact connection. Required fields are marked with * (use Look Up to search for values if needed).
3. **Input:** Role for 'as this role' (use Look Up to search for role). *Note: in the Training environment, this may not be displayed as a 'required *' field. This will be a 'required *' field to support customer requirements when BATS is fully implemented.*
4. **Select:** Save.

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

Sample: Input name of contact -and- input value for 'as this role'.



Input name of contact. Use Look Up to search for name.

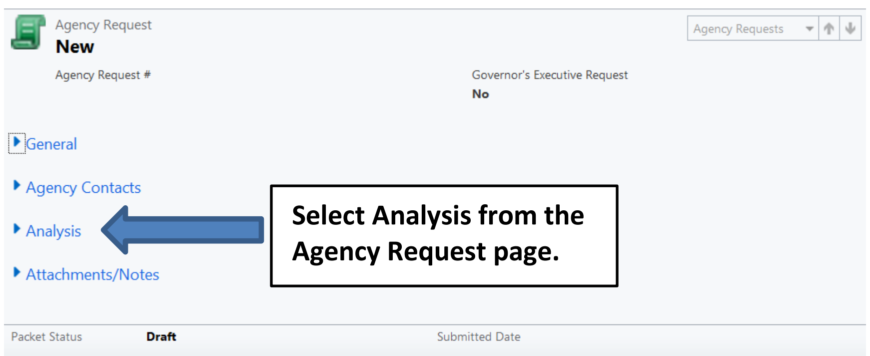
Input value for 'as this role'. Use Look Up to search for role.

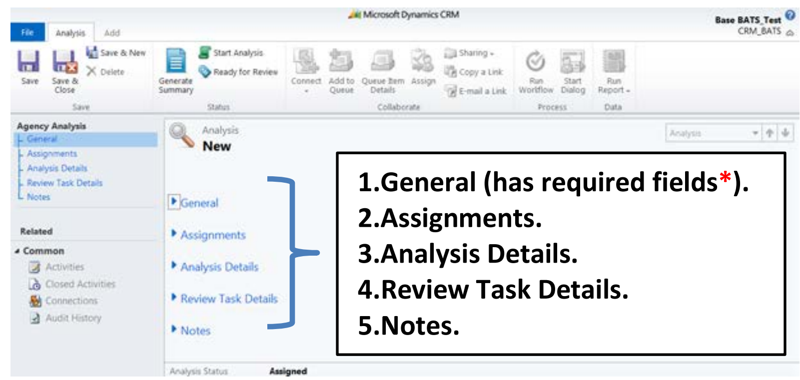
Manage Agency Request - Analysis

The ability to manage agency requests is based on the business unit associated with the 'owner' of the agency request. This helps to ensure that individual agencies own and control access to their information.

- Manage agency request analysis.
- Provide general information about the analysis.
- Assignments (reviewer assignments).
- Analysis details (start analysis).
- Review task details.
- Notes.

Sample*:* Agency Request Analysis is initially separated into 5 sections. This analysis is for internal agency use. Information on the agency analysis is not available to OFM unless the agency uses the 'share' function in BATS.





Add New Analysis

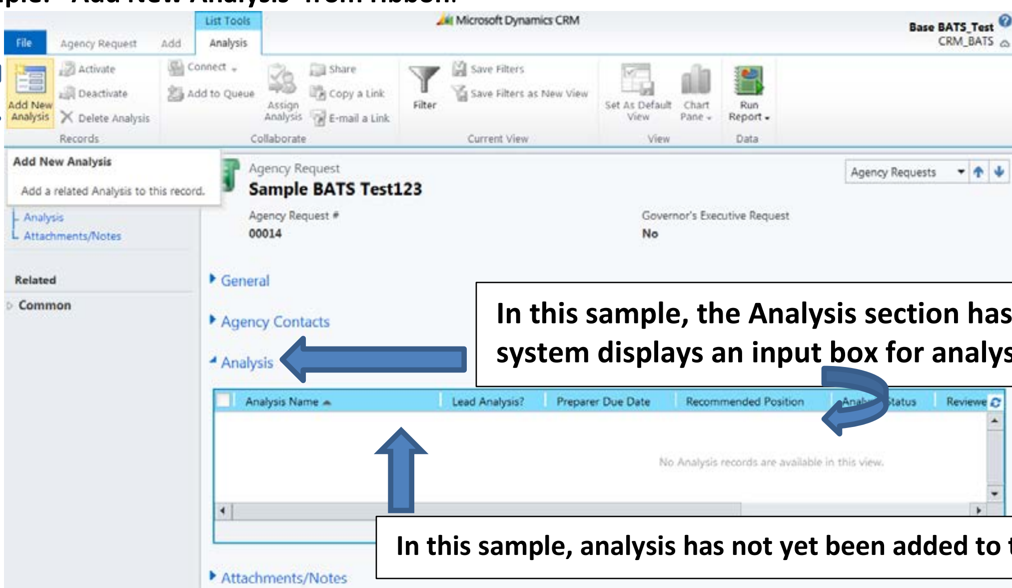
Agency analysis information may be added to an agency request.

To add a new analysis to an agency request:

1. **Select:** Agency Requests (left side navigation pane).
2. **Scroll**: To find the agency request (use the dropdown list to change view if needed).
3. **Select**: Title of agency request (left-mouse-click on the agency title).
4. **Select:** Analysis section within the agency request.

☑**Result**: The system will open (expand) the analysis section and display an input box for analysis to be added. Note: if the agency request has not yet been saved, the input box will display a message ‘To enable this content, save the record’. The agency request needs to be saved so that analysis may be added. ➔**Note:** Additional steps are needed to add a new analysis.

Sample: ‘Add New Analysis’ from ribbon.



In this sample, the Analysis section has been selected and the system displays an input box for analysis to be added.

In this sample, analysis has not yet been added to the agency request.

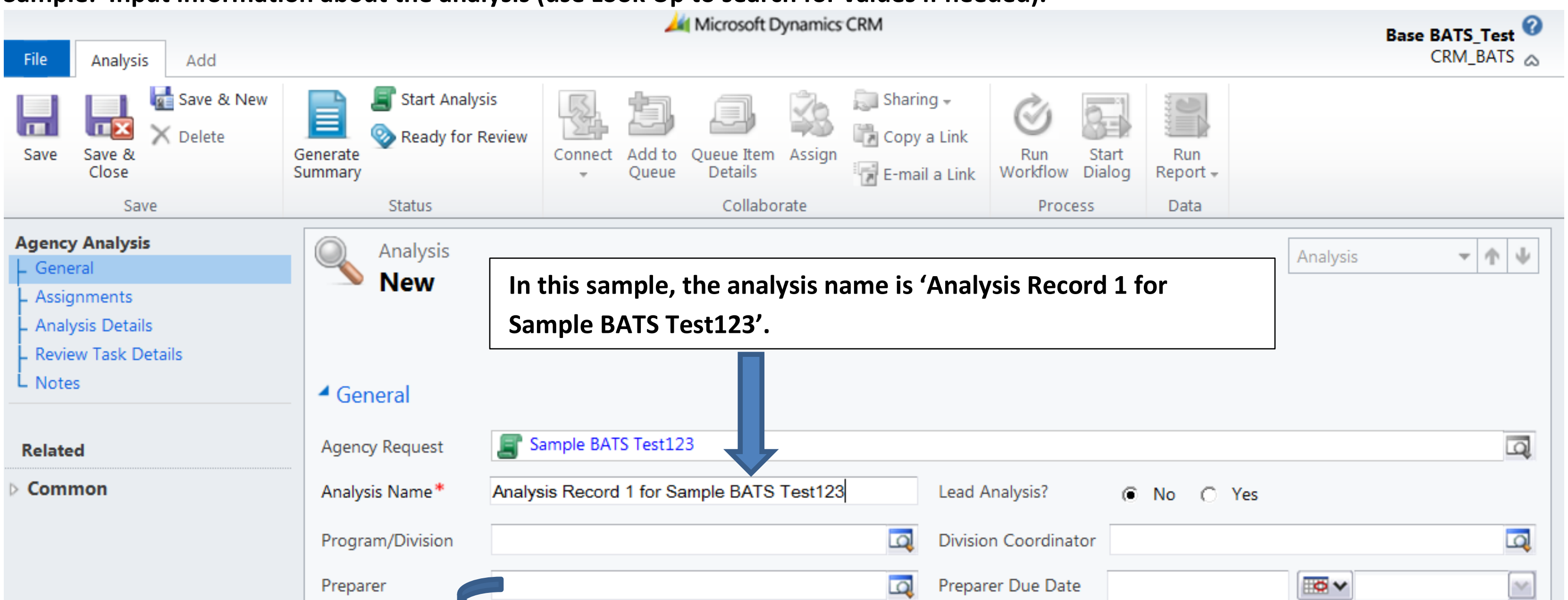
Add New Analysis (continued)

To continue steps needed to add a new analysis to an agency request:

1. **Select:** Add New Analysis (from the ribbon). The add new analysis function will not be displayed on the ribbon if the agency request has not yet been saved.
2. **Input:** Information about the analysis. Required fields are marked with * (use Look Up to search for values if needed).
3. **Select:** Save.

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

Sample: Input information about the analysis (use Look Up to search for values if needed).



In this sample, the analysis name is 'Analysis Record 1 for Sample BATS Test123'.

Input the name of the agency contact who will be responsible for preparing the analysis for review.

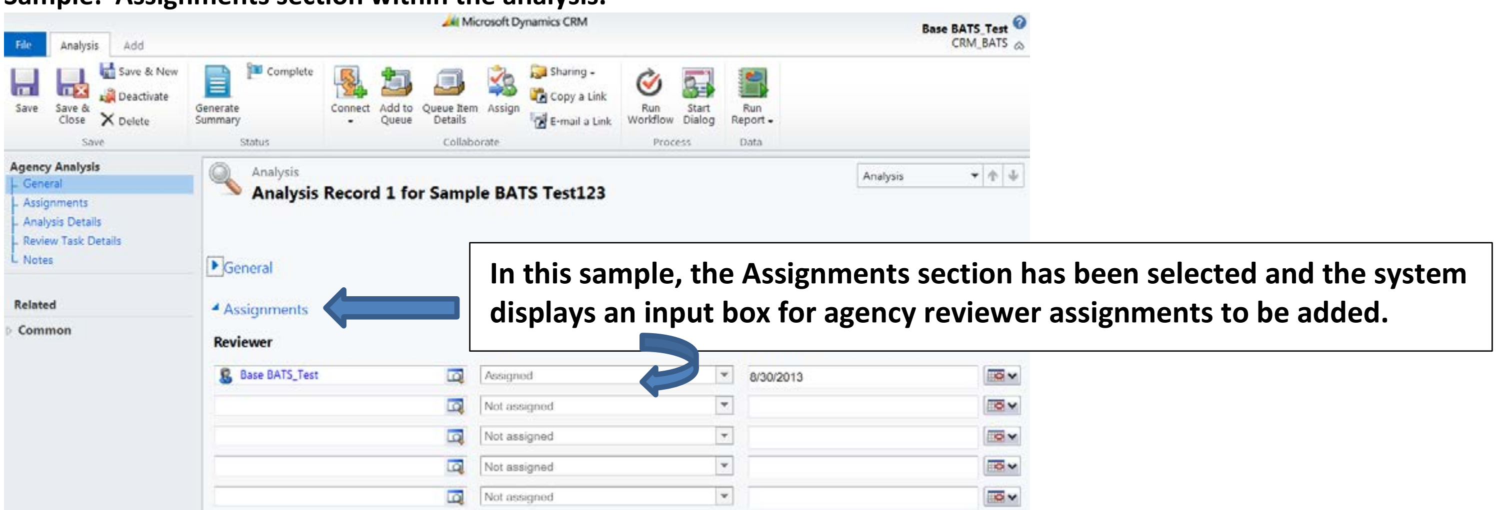
Add Assignments for Agency Analysis Reviewers
Assignments for agency reviewers may be added to an agency analysis.

To add assignments for agency analysis reviewers:

1. **Select:** Agency Requests (left side navigation pane).
2. **Scroll**: To find the agency request (use the dropdown list to change view if needed).
3. **Select**: Title of agency request (left-mouse-click on the agency title).
4. **Select:** Analysis section within the agency request.
5. **Select:** Agency analysis (use the mouse to left-click analysis name).
6. **Select:** Assignments section within the analysis.

☑**Result**: The system will open (expand) the assignments section and display an input box for reviewer assignments to be added. 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 add assignments for agency analysis reviewers.

Sample: Assignments section within the analysis.



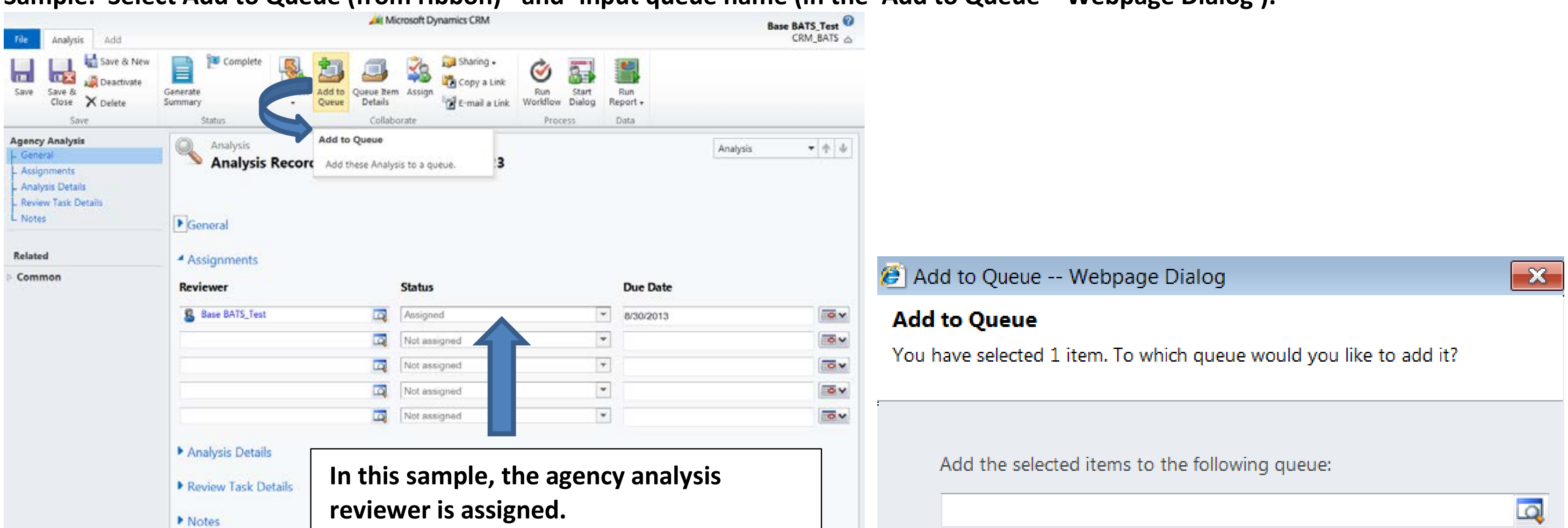
Add Assignments for Agency Analysis Reviewers (continued)

To continue steps needed to add assignments for agency analysis reviewers:

1. **Input:** Reviewer information (use Look Up to search for reviewer name). Note: some agencies may use programs as a 'template' to identify reviewers. If the analysis has a program assigned to it (in the general section of the analysis), the reviewer name may be displayed already (the system populates reviewer name from the program 'template').
2. **Select:** Save. Note: The assignment is added (saved) but not yet assigned.
3. **Select:** Add to Queue (from the ribbon). The system will open an 'Add to Queue – Webpage Dialog' to prompt for the Queue name.
4. **Input:** Queue name in the 'Add to Queue – Webpage Dialog' (use Look Up to search for queue).

☑**Result**: Reviewer assignment is added and status is updated to 'assigned'. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Select Add to Queue (from ribbon) –and- input queue name (in the 'Add to Queue – Webpage Dialog').



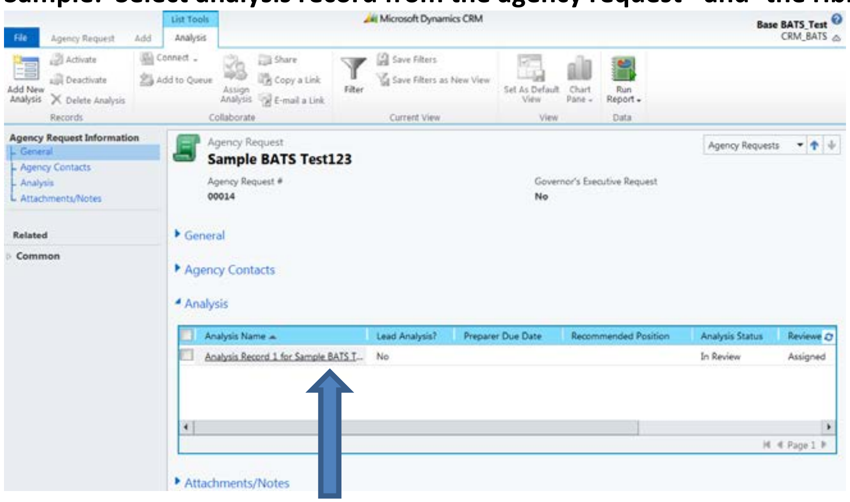
In this sample, the agency analysis reviewer is assigned.

Start Analysis

Analysis details, notes, and attachments may be added to an agency request.

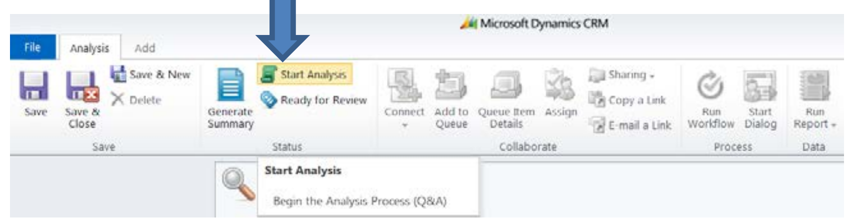
- This analysis is for internal agency use. Information on the agency analysis is not available to OFM unless the agency uses the 'share' function in BATS.
- When 'start analysis' is selected, the system prompts for information using a question/answer format. This provides an easy way to input new analysis details to support the agency request.
- After the analysis is input, it may be edited/formatted from the analysis details section if needed.

Sample: Select analysis record from the agency request –and- the ribbon will display additional functions.



In this sample, the ribbon bar displays additional functions to be used with the agency analysis.

- **Use 'start analysis' to input new analysis details.**
- **After the analysis is input, it may be edited/formatted from the analysis details section if needed.**



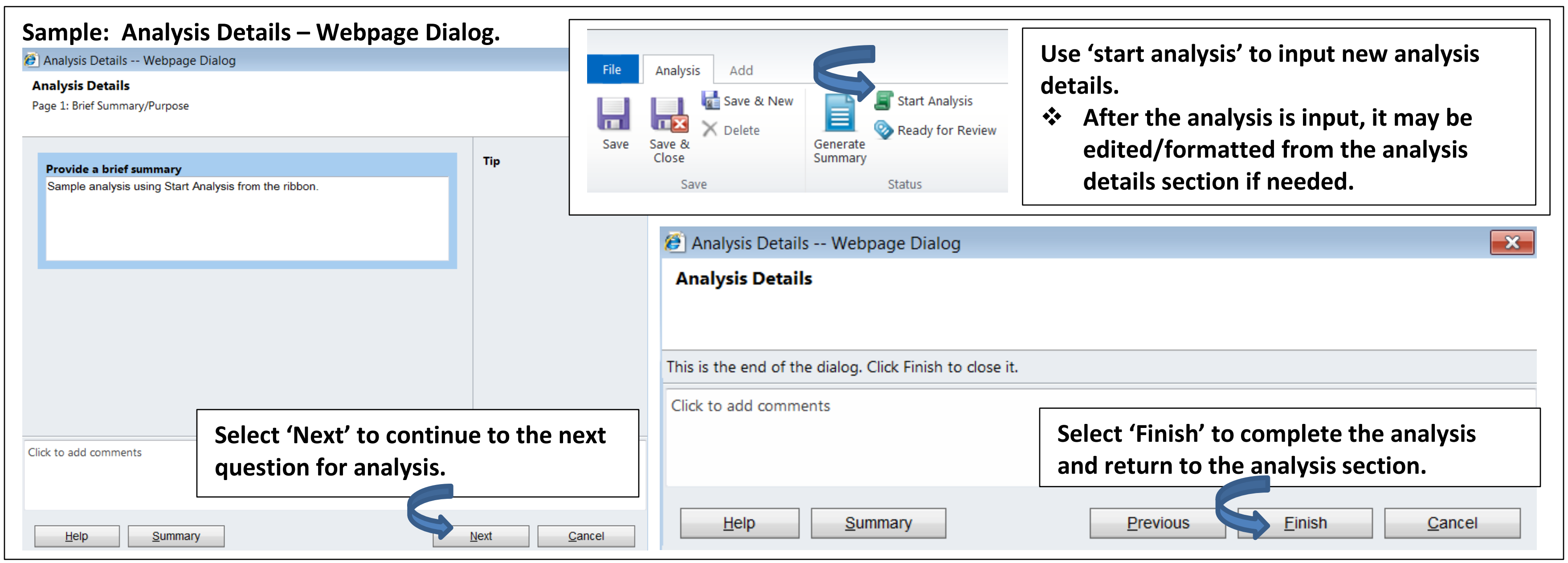
In this sample, one analysis has been added to the Agency Request. To open the analysis, use the mouse to left-click on the analysis name.

Start Analysis (continued)

To start the analysis:

1. **Select:** Analysis section within the agency request.
2. **Scroll:** To find agency analysis.
3. **Select:** Agency analysis (use the mouse to left-click analysis name).
4. **Select:** Start Analysis (from the ribbon). The system will open the 'Analysis Details – Webpage Dialog' to prompt for information using a question/answer format. This provides an easy way to input new analysis of the agency request.
5. **Input:** Information about the analysis.
6. **Select:** Finish.
7. **Select:** Save.

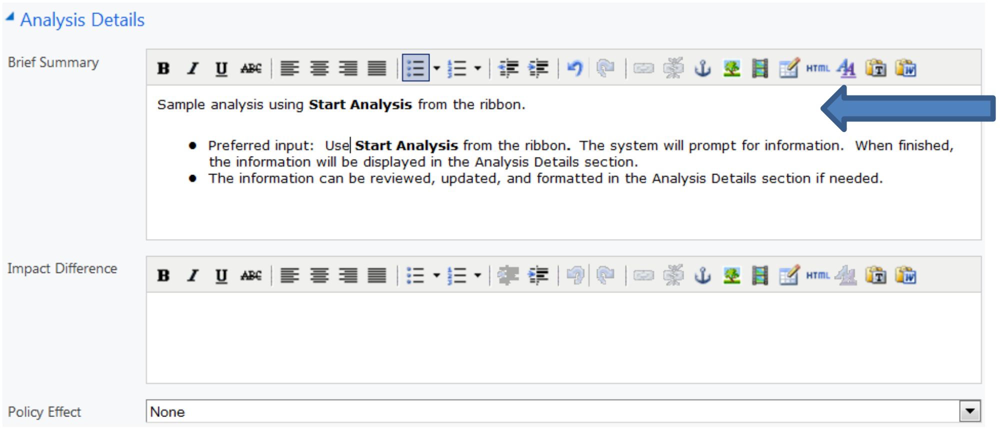
☑**Result**: Analysis information is displayed in the analysis details section. This information may be edited/formatted from the analysis details section if needed. An error message will be displayed if the action is not allowed due to security permissions or system validation error.



Start Analysis (continued)

Analysis information is displayed in the analysis details section. This information may be edited/formatted from the analysis details section if needed.

Sample: Analysis information that was provided from the 'Analysis Details – Webpage Dialog' is displayed in the analysis details section.



In this sample, the information was updated and formatted using bullets and bold text.

Analysis – Notes

Analysis notes and/or attachments may be added to an agency analysis.

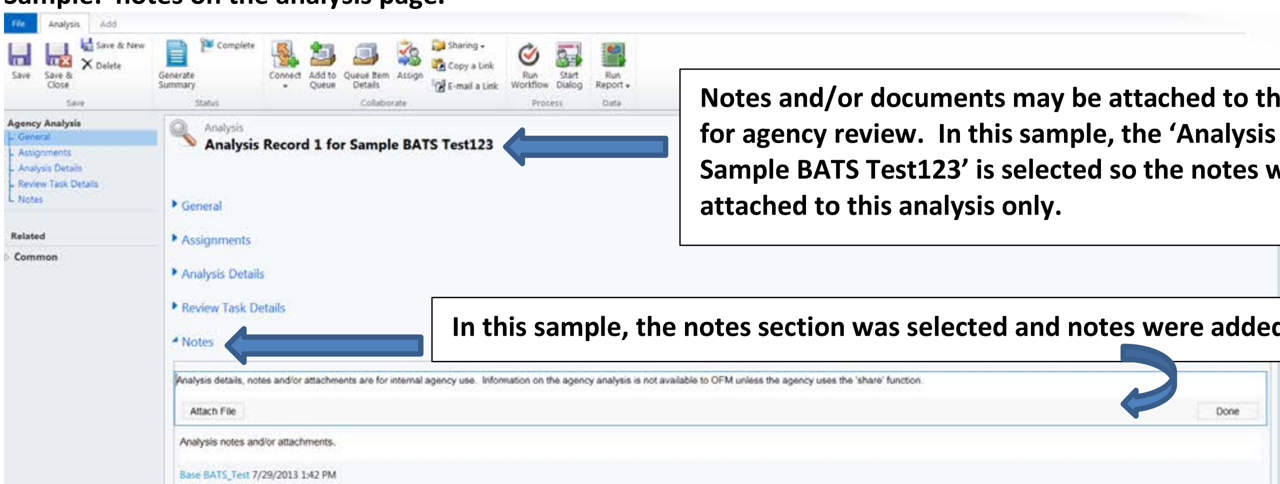
❖ These notes and/or attachments are on the analysis page (not on the agency request page). Analysis details, notes and/or attachments are for internal agency use. Information on the agency analysis is not available to OFM unless the agency uses the 'share' function.

To add notes and/or attachments to the analysis:

1. **Select:** Analysis section within the agency request.
2. **Scroll:** To find agency analysis.
3. **Select:** Agency analysis (use the mouse to left-click analysis name).
4. **Select:** Notes. This is the notes section within the analysis page.
5. **Input:** Analysis notes and/or attachments.
6. **Select:** Save.

☑**Result**: Notes and/or attachments are added to the analysis page. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: notes on the analysis page.



Analysis - Review Task Details

Additional reviewers and/or task details may be added to an agency analysis.

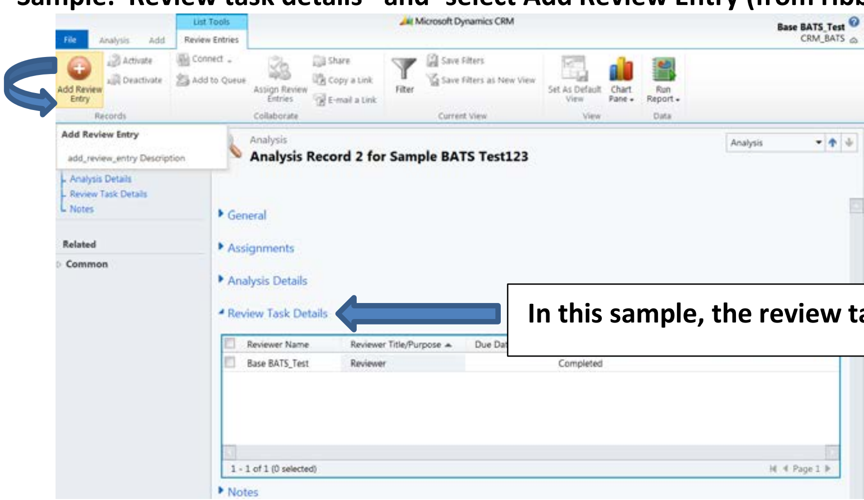
- ❖ Some agencies may use the review task details section to keep track of reviews to be completed by external reviewers (e.g. vendors or other reviewers).
- ❖ Agency reviewers may use the review task details section to update/view assigned task details.

To add reviewers and/or task details:

1. **Select:** Analysis section within the agency request.
2. **Scroll:** To find agency analysis.
3. **Select:** Agency analysis (use the mouse to left-click analysis name).
4. **Select:** Review Task Details section.
5. **Select:** Add Review Entry (from ribbon bar).

☑**Result**: The system will open a review entry page. 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 add reviewers and/or task details.

Sample: Review task details –and- select Add Review Entry (from ribbon).



In this sample, the review task details section was selected.

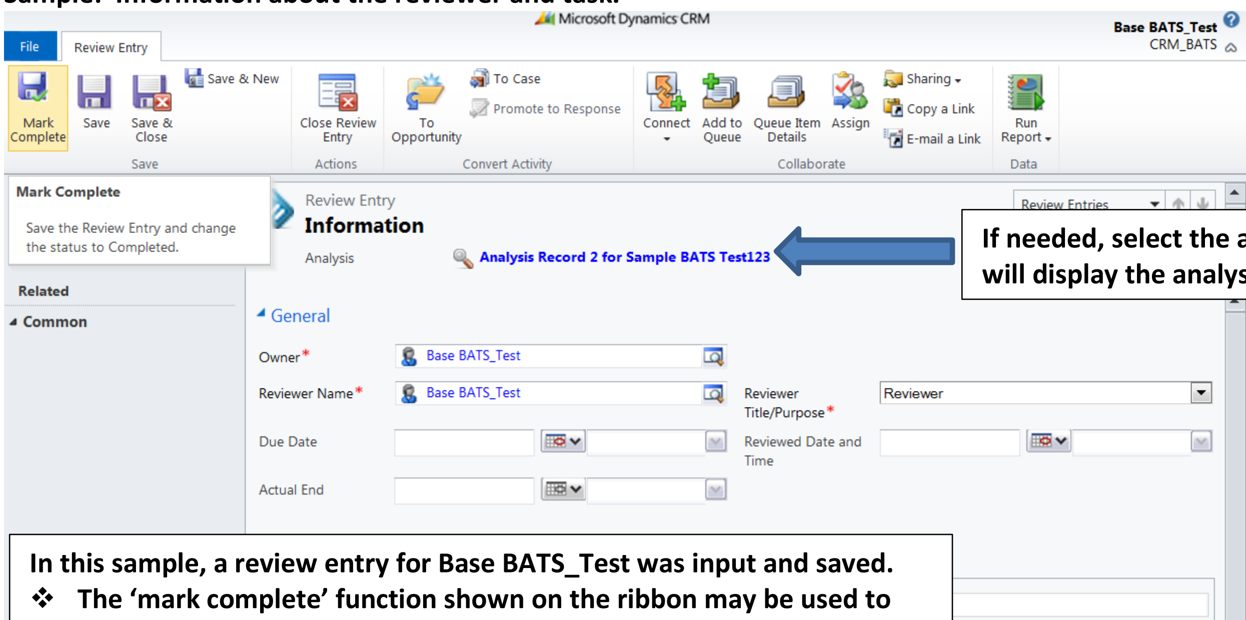
Analysis - Review Task Details (continued)

To continue steps needed to add reviewers and/or task details:

1. **Input:** Information about the reviewer and task.
2. **Select:** Save.

☑**Result**: Reviewers and/or task details are added. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Information about the reviewer and task.



If needed, select the analysis name and the system will display the analysis details.

In this sample, a review entry for Base BATS_Test was input and saved.

- ❖ **The 'mark complete' function shown on the ribbon may be used to indicate that the review task is complete.**

Analysis - Ready for Review

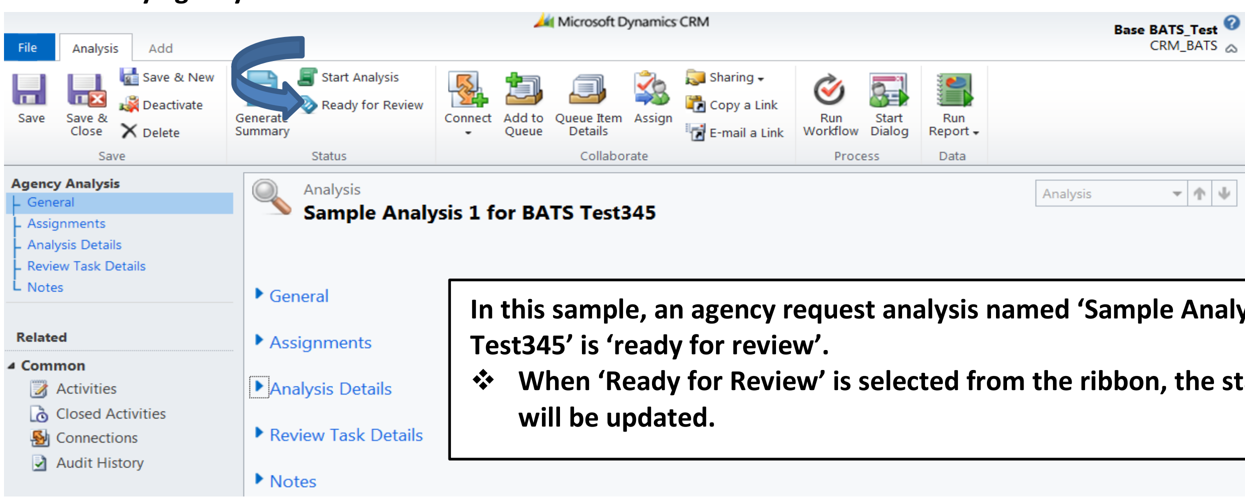
Ready for Review (from the ribbon) is used when the analysis details are completed and the information is ready to be reviewed by agency reviewers.

To indicate the analysis is ready for review:

1. **Select:** Analysis section within the agency request.
2. **Scroll:** To find agency analysis.
3. **Select:** Agency analysis (use the mouse to left-click analysis name).
4. **Select:** Ready for Review (from the ribbon).

☑**Result**: Agency analysis is ready for review by agency reviewers (status is updated). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Ready for Review (from the ribbon) is used when the analysis details are completed and the information is ready to be reviewed by agency reviewers.



In this sample, an agency request analysis named 'Sample Analysis 1 for BATS Test345' is 'ready for review'.

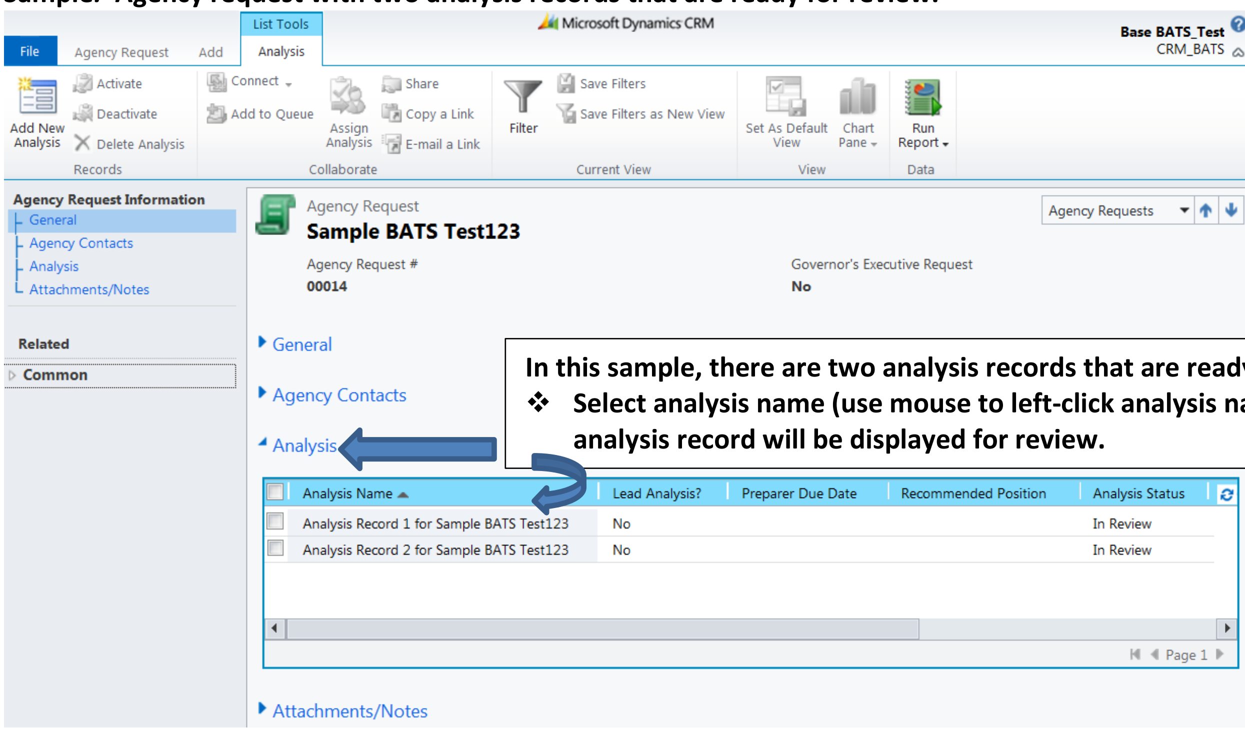
- ❖ **When 'Ready for Review' is selected from the ribbon, the status for the analysis will be updated.**

Manage Agency Request – Review

The ability to manage agency requests is based on the business unit associated with the 'owner' of the agency request. This helps to ensure that individual agencies own and control access to their information.

- ❖ Analysis (and analysis notes/attachments) will be available to agency reviewer(s) and can be updated if needed.

Sample*:* Agency request with two analysis records that are ready for review.



In this sample, there are two analysis records that are ready for review.

- ❖ **Select analysis name (use mouse to left-click analysis name) and the analysis record will be displayed for review.**

Review Agency Analysis – Generate Summary

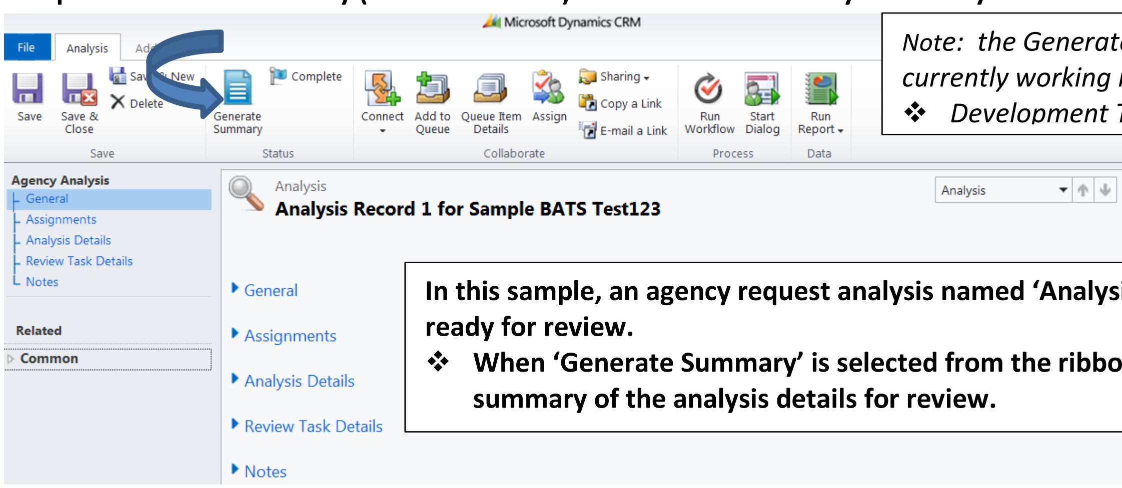
The ability to review agency analysis is based on the business unit associated with the ‘owner’ of the agency request. This helps to ensure that individual agencies own and control access to their information.

To review a summary of an agency analysis:

1. **Select:** Agency Requests (left side navigation pane).
2. **Scroll**: To find the agency request (use the dropdown list to change view if needed).
3. **Select**: Title of agency request (left-mouse-click on the agency title).
4. **Select:** Analysis section within the agency request.
5. **Scroll:** To find agency analysis.
6. **Select:** Agency analysis (use the mouse to left-click analysis name).
7. **Select:** Generate Summary (from the ribbon).

☑**Result**: The system will display a summary of the analysis details for review. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Generate Summary (from the ribbon) is used when the analysis is ready to be reviewed by an agency reviewer.



Note: the Generate Summary function from the ribbon bar is not currently working in the training environment.

❖ *Development Team is currently working to resolve this issue.*

In this sample, an agency request analysis named ‘Analysis Record 1 for BATS Test123’ is ready for review.

❖ **When ‘Generate Summary’ is selected from the ribbon, the system will display a summary of the analysis details for review.**

Review Agency Analysis – Mark Complete For Reviewer Task

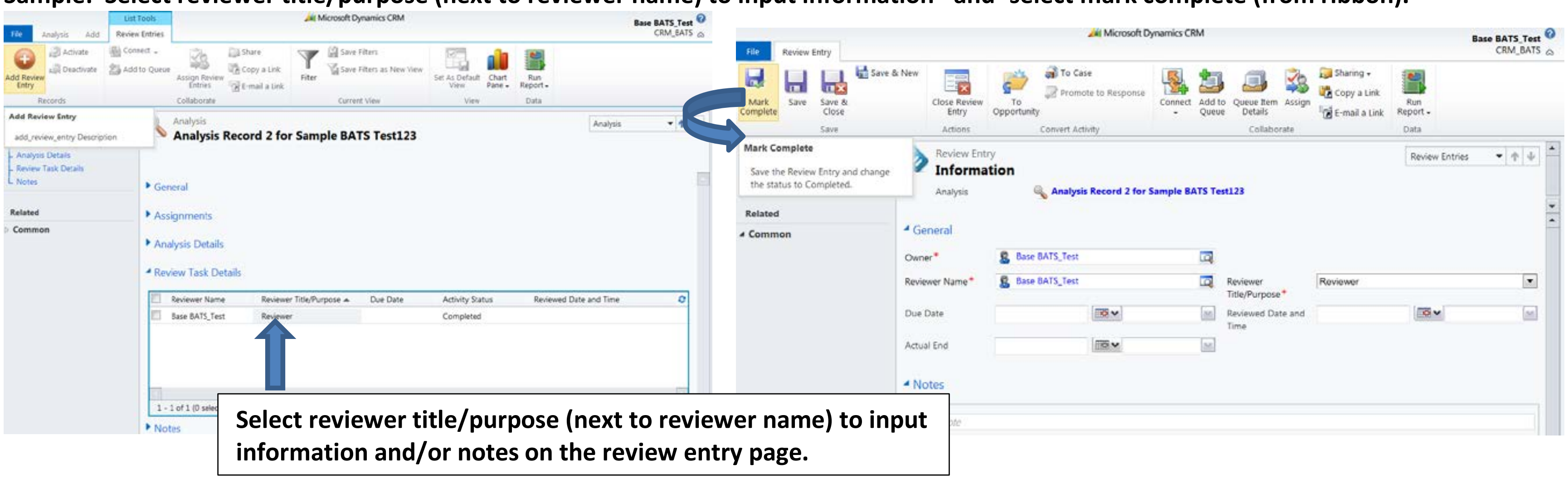
When each review task is complete, the task may be updated on the analysis to indicate the assigned task (review) is complete.

To update the reviewer assigned task ('mark complete'):

1. **Select:** Analysis section within the agency request.
2. **Scroll:** To find agency analysis.
3. **Select:** Agency analysis (use the mouse to left-click analysis name).
4. **Select:** Review Task Details section.
5. **Scroll:** To find the task.
6. **Select:** Reviewer Title/Purpose (next to reviewer name). The system will open the review entry information page.
7. **Input:** Information and/or notes if needed.
8. **Select:** Mark Complete (from the ribbon).

☑**Result**: Status for the task is marked complete (status is updated for a specific reviewer). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

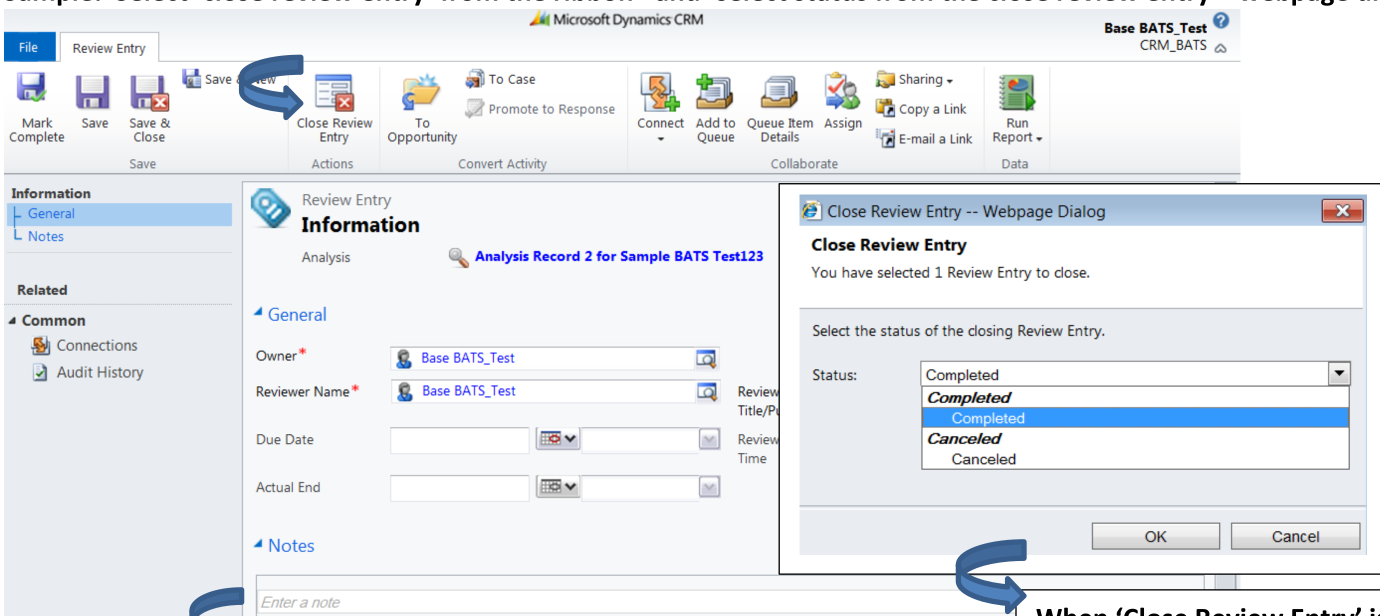
Sample: Select reviewer title/purpose (next to reviewer name) to input information –and- select mark complete (from ribbon).



Review Agency Analysis – Mark Complete For Reviewer Task (continued)

If a review task has been created and needs to be closed by someone other than the assigned reviewer, there is a 'Close Review Entry' function available from the ribbon (this step is usually completed by the agency coordinator).

Sample: Select 'close review entry' from the ribbon –and- select status from the close review entry – webpage dialog.



Input information and/or notes about the reviewer task on the review entry page.

When 'Close Review Entry' is selected from the ribbon, the Close Review Entry – Webpage Dialog will be displayed.

Review Agency Analysis – Complete Review

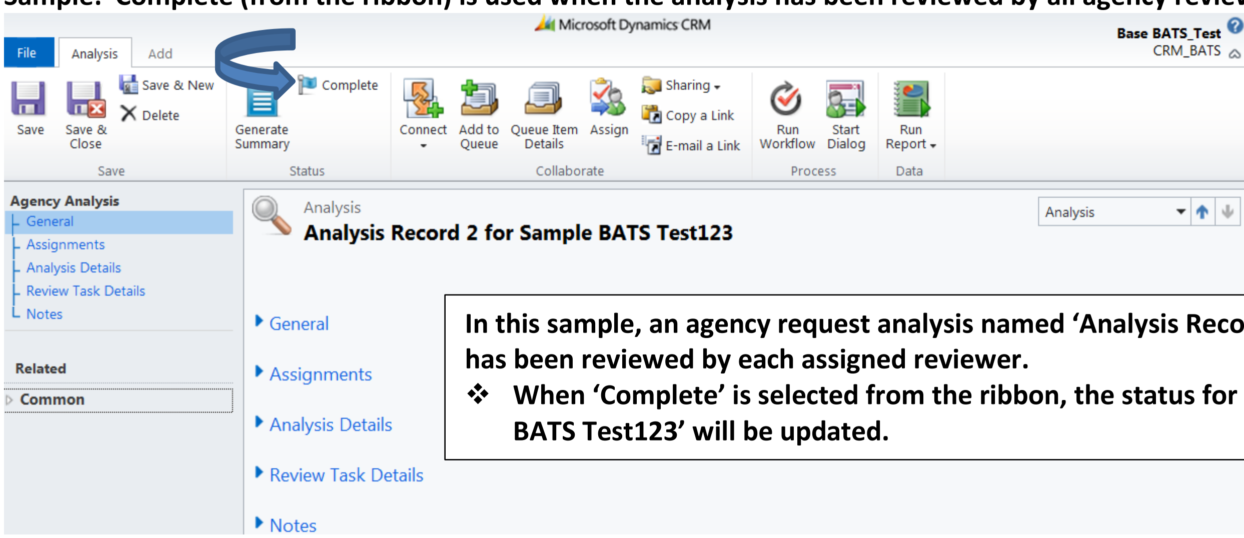
When all review tasks are complete for an analysis record, the analysis may be updated to indicate the review cycle is complete (this step is usually completed by the agency coordinator).

To update the analysis as 'complete':

1. **Select:** Agency Requests (left side navigation pane).
2. **Scroll**: To find the agency request (use the dropdown list to change view if needed).
3. **Select**: Title of agency request (left-mouse-click on the agency title).
4. **Select:** Analysis section within the agency request.
5. **Scroll:** To find agency analysis.
6. **Select:** Agency analysis (use the mouse to left-click analysis name).
7. **Select:** Complete (from the ribbon).

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

Sample: Complete (from the ribbon) is used when the analysis has been reviewed by all agency reviewers.



In this sample, an agency request analysis named 'Analysis Record 2 for BATS Test123' has been reviewed by each assigned reviewer.

- **When 'Complete' is selected from the ribbon, the status for 'Analysis Record 2 for BATS Test123' will be updated.**

Agency Request – Attachments/Notes

Attachments and/or notes may be added to an agency request. The agency request will be linked to the business unit associated with the 'owner' of the agency request.

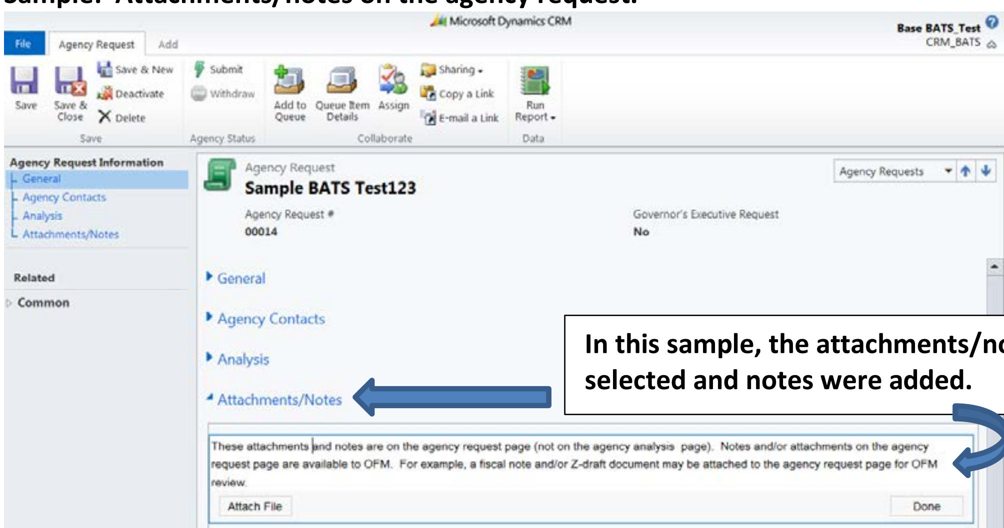
❖ These attachments and/or notes are on the agency request page (not on the agency analysis page). Attachments and/or notes on the agency request page are available to OFM when the agency request is submitted to OFM.

To add attachments and/or notes to the agency request:

1. **Select:** Agency Requests (left side navigation pane).
2. **Scroll**: To find the agency request (use the dropdown list to change view if needed).
3. **Select**: Title of agency request (left-mouse-click on the agency title).
4. **Select:** Attachments/Notes section within the agency request.
5. **Input:** Attachments and/or notes for the agency request.

☑**Result**: Attachments and/or notes are added to the agency request. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Attachments/notes on the agency request.



For example, a fiscal note and/or Z-draft document may be attached to the agency request page for OFM review.

In this sample, the attachments/notes section was selected and notes were added.

Manage Agency Request - Submit

Additional information is required to submit an agency request to OFM. The checklist for agency packets will be displayed when an agency selects ‘submit’. BATS will first check to ensure all required fields are complete.

If all required* fields are	Then BATS will display
Not complete.	Error message with list of required* fields.
Complete.	Checklist for agency requests.

To submit an agency request from the BATS tab (left-side navigation pane):

1. **Select:** Agency Requests (left side navigation pane).
2. **Scroll**: To find agency request (use the dropdown list to change view if needed to narrow the list of contacts).
3. **Select**: Title of agency request (left-mouse-click on the agency title).
4. **Select:** Submit (from the ribbon bar).
5. **Select:** OK (in the Confirm Assignment – Webpage Dialog).

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

Sample: Submit (from the ribbon bar).