

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	<ul style="list-style-type: none"> ❖ Input general information. ❖ Connect contacts. ❖ Assign preparer for analysis. 	<p>Starting point for agency request packet.</p> <ul style="list-style-type: none"> ❖ 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	<ul style="list-style-type: none"> ❖ Add new analysis. ❖ Assign reviewers (for analysis). ❖ Select 'start analysis' and input information to answer questions when prompted. ❖ Edit and format analysis information. 	<p>Starting point for agency analysis.</p> <ul style="list-style-type: none"> ❖ 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: <ul style="list-style-type: none"> ❖ Add review task details. ❖ Add notes and/or attachments for analysis reviewers. ❖ Select 'ready for review'. Agency Review: <ul style="list-style-type: none"> ❖ Generate Summary. ❖ Review analysis. ❖ Update analysis (if needed). ❖ Select 'mark complete' (reviewer task status). ❖ Select 'complete' (all reviews complete). 	Starting point for agency review. <ul style="list-style-type: none"> ❖ 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	<ul style="list-style-type: none"> ❖ Select 'submit'. 	Starting point for agency submit. <ul style="list-style-type: none"> ❖ 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	<ul style="list-style-type: none"> ❖ Select 'withdraw'. 	Agency requests may be withdrawn if the request has been submitted to OFM for review. <ul style="list-style-type: none"> ❖ 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.

1.General (has required fields*).
2.Agency Contacts.
3.Analysis.
4.Attachments/Notes.

- ❖ 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.

The screenshot shows the Microsoft Dynamics CRM interface. On the left, the navigation pane is expanded to show 'BATS' and 'Agency Requests'. A blue arrow points to the 'Agency Requests' link. The main area displays the 'Agency Requests' list with columns for Short Title, Packet Status, Program, and Session. A callout box with a black border and white background contains the text: 'Use the dropdown list to change views if needed (this sample uses the 'Agency Requests in Current Session' view)'. A blue arrow points to the view dropdown menu in the top right of the list area.

Short Title	Packet Status	Program	Session
Testing	Draft		2013 First Special Session of the 63rd Legislature
TestBATS	Draft		2013 First Special Session of the 63rd Legislature
TestBATS1	Draft		2013 First Special Session of the 63rd Legislature

Access Agency Requests (continued)

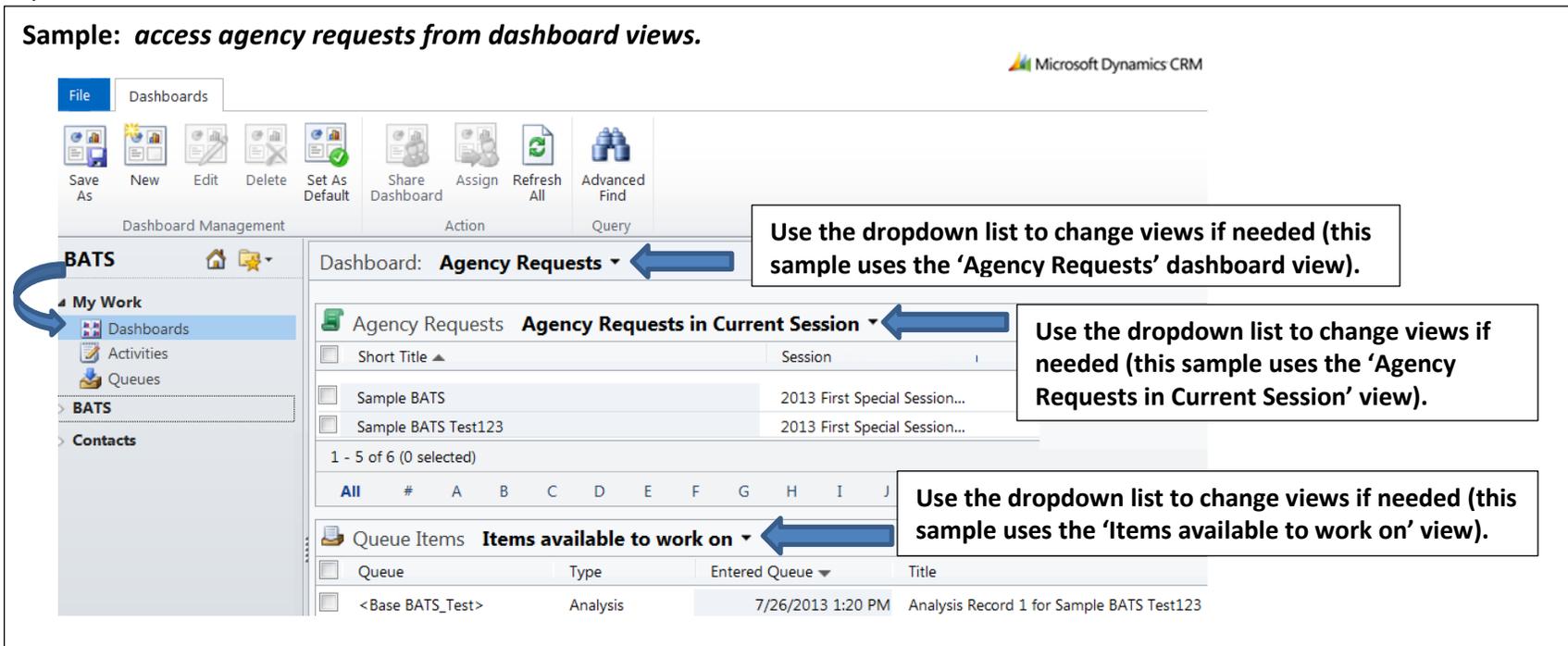
Agency requests are available from some of the BATS dashboards.

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.*



The screenshot shows the Microsoft Dynamics CRM interface. The left navigation pane has 'BATS' selected. The main area displays the 'Agency Requests' dashboard. Three callout boxes with arrows point to specific dropdown menus:

- Top Callout:** Points to the 'Agency Requests' dashboard dropdown menu. Text: "Use the dropdown list to change views if needed (this sample uses the 'Agency Requests' dashboard view)."

Dashboard: Agency Requests

- Middle Callout:** Points to the 'Agency Requests in Current Session' view dropdown menu. Text: "Use the dropdown list to change views if needed (this sample uses the 'Agency Requests in Current Session' view)."

Agency Requests Agency Requests in Current Session
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- Bottom Callout:** Points to the 'Items available to work on' view dropdown menu. Text: "Use the dropdown list to change views if needed (this sample uses the 'Items available to work on' view)."

Queue Items Items available to work on
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The main data table shows the following content:

Short Title	Session
Sample BATS	2013 First Special Session...
Sample BATS Test123	2013 First Special Session...

Queue	Type	Entered Queue	Title
<Base BATS_Test>	Analysis	7/26/2013 1:20 PM	Analysis Record 1 for Sample BATS Test123

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.

The screenshot shows the Microsoft Dynamics CRM interface. The left navigation pane has 'BATS' selected, and 'Agency Requests' is highlighted. The main area shows a table of Agency Requests with columns for Short Title, Packet Status, and Program. A dropdown menu is open over the table, showing 'Agency Requests in Current Session'. Annotations include a blue arrow pointing to the BATS tab, a blue arrow pointing to the 'Agency Requests in Current Session' dropdown, and a blue arrow pointing to the 'TestBATS1' row title. Text boxes provide instructions: 'Use the dropdown list to change views if needed.' and 'Use mouse to left-click on title of agency request to view information.'

Short Title	Packet Status	Program
Testing	Draft	2013 First Special Ses
TestBATS	Draft	2013 First Special Session of the 63rd Legislature
TestBATS1	Draft	2013 First Special Session of the 63rd Legislature

Update (Modify) Agency Request

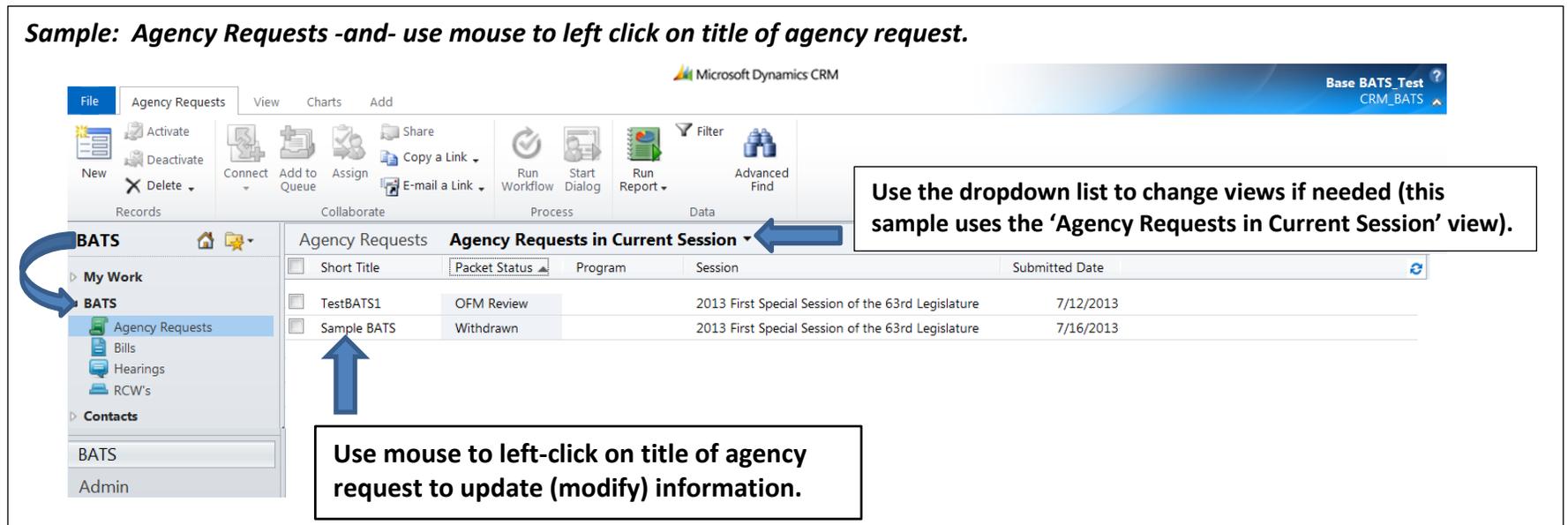
The agency request will be linked to the business unit associated with the 'owner' of the agency request.

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.



Use the dropdown list to change views if needed (this sample uses the 'Agency Requests in Current Session' view).

Short Title	Packet Status	Program	Session	Submitted Date
TestBATS1	OFM Review		2013 First Special Session of the 63rd Legislature	7/12/2013
Sample BATS	Withdrawn		2013 First Special Session of the 63rd Legislature	7/16/2013

Use mouse to left-click on title of agency request to update (modify) information.

Assign Agency Request

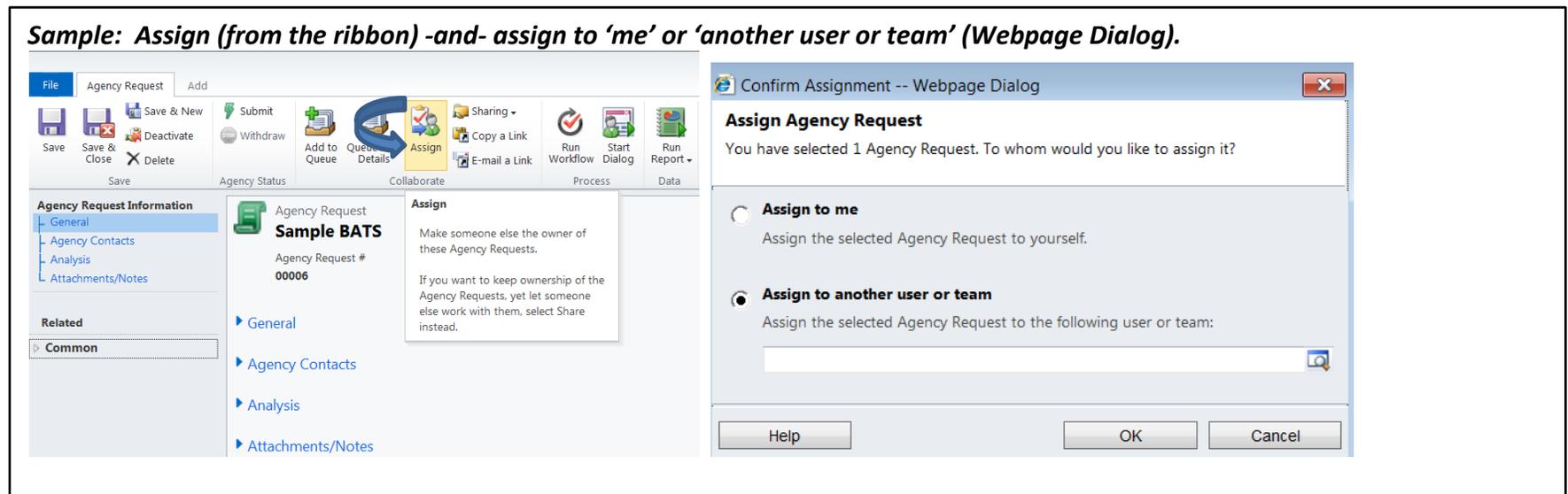
The agency request will be linked to the business unit associated with the 'owner' of the agency request.

- ❖ 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).



The screenshot shows the BATS software interface. On the left, the 'Agency Request Information' pane is visible, showing 'Sample BATS' with 'Agency Request # 00006'. The 'Assign' ribbon button is highlighted. A 'Confirm Assignment -- Webpage Dialog' window is open, displaying the following text: 'Assign Agency Request', 'You have selected 1 Agency Request. To whom would you like to assign it?'. There are two radio button options: 'Assign to me' (unselected) and 'Assign to another user or team' (selected). Below the second option is a search field with a magnifying glass icon. At the bottom of the dialog are 'Help', 'OK', and 'Cancel' buttons.

Share Agency Request

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

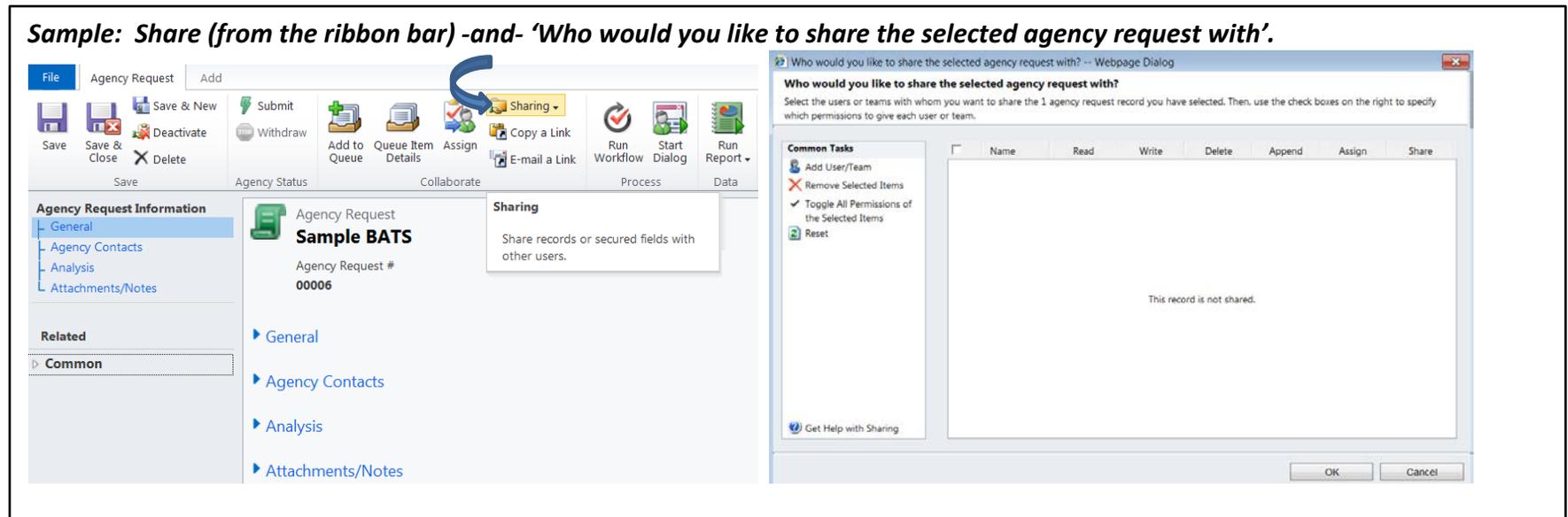
- ❖ The Share function from the ribbon bar may also be used on other pages. For example, an agency analysis may be shared with another user.

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'.



The screenshot displays the BATS software interface. On the left, the 'Agency Request Information' pane shows the 'General' tab selected. The main area shows an 'Agency Request' for 'Sample BATS' with ID '00006'. The 'Sharing' ribbon tab is active, showing options like 'Share records or secured fields with other users.' A dialog box titled 'Who would you like to share the selected agency request with?' is open, prompting the user to select users or teams to share the record with. The dialog includes a 'Common Tasks' section with options like 'Add User/Team', 'Remove Selected Items', 'Toggle All Permissions of the Selected Items', and 'Reset'. A table with columns for 'Name', 'Read', 'Write', 'Delete', 'Append', 'Assign', and 'Share' is present, but it is empty, and a message states 'This record is not shared.' The dialog has 'OK' and 'Cancel' buttons at the bottom.

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.

Who would you like to share the selected agency request with? -- Webpage Dialog

Who would you like to share the selected agency request with?

Select the users or teams with whom you want to share the 1 agency request record you have selected. Then, use the check boxes on the right to specify which permissions to give each user or team.

<input checked="" type="checkbox"/>	Name	Read	Write	Delete	Append	Assign	Share
<input checked="" type="checkbox"/>	Base BATS_Test	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Common Tasks

- Add User/Team
- Remove Selected Items
- Toggle All Permissions of the Selected Items
- Reset
- Get Help with Sharing

OK Cancel

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.

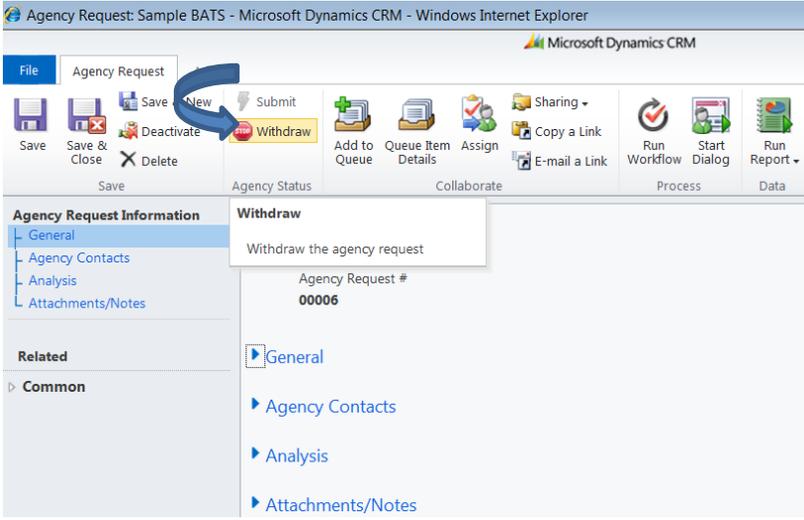
- ❖ This function should be used as an exception process only. BATS does not currently generate a notice to inform OFM and/or internal contacts that the request has been withdrawn.

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 screenshot displays the Microsoft Dynamics CRM interface for an Agency Request. The ribbon bar is visible, showing the 'Agency Status' group with the 'Withdraw' button highlighted. A blue arrow points to the 'Withdraw' button. The left navigation pane shows the 'Agency Request Information' section with 'General' selected. The main content area shows the 'Withdraw' dialog box with the text 'Withdraw the agency request' and 'Agency Request # 00006'. The 'Related' section shows 'General', 'Agency Contacts', 'Analysis', and 'Attachments/Notes'.

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.

<p>Manage Agency Request – Input Starting point for agency request packet.</p> <ul style="list-style-type: none"> ❖ Input general information. ❖ Connect contacts. ❖ Assign preparer for analysis. 	<p>Manage Agency Request – Analysis Starting point for agency analysis.</p> <ul style="list-style-type: none"> ❖ 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.
<p>Manage Agency Request – Review Starting point for agency review.</p> <ul style="list-style-type: none"> ❖ 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). 	<p>Manage Agency Request – Submit Starting point for agency submit.</p> <ul style="list-style-type: none"> ❖ 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. <ul style="list-style-type: none"> ❖ 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.

In this sample, the General section for a new agency request is expanded.

- 1.General (has required fields*).
- 2.Agency Contacts.
- 3.Analysis.
- 4.Attachments/Notes.

- ❖ 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).

The screenshot displays the Microsoft Dynamics CRM interface for the BATS (Bill Analysis and Tracking System) module. The ribbon is set to 'Agency Requests' and shows various actions like 'New', 'Deactivate', 'Delete', 'Connect', 'Add to Queue', 'Assign', 'Share', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', 'Run Report', 'Filter', and 'Advanced Find'. The left navigation pane shows the 'BATS' section expanded, with 'Agency Requests' selected. The main content area shows a table titled 'Agency Requests in Current Session' with the following data:

Short Title	Packet Status	Program	Session	Submitted Date
Sample BATS	Draft		2013 First Special Session of the 63rd Legislature	

Update (Modify) Agency Request

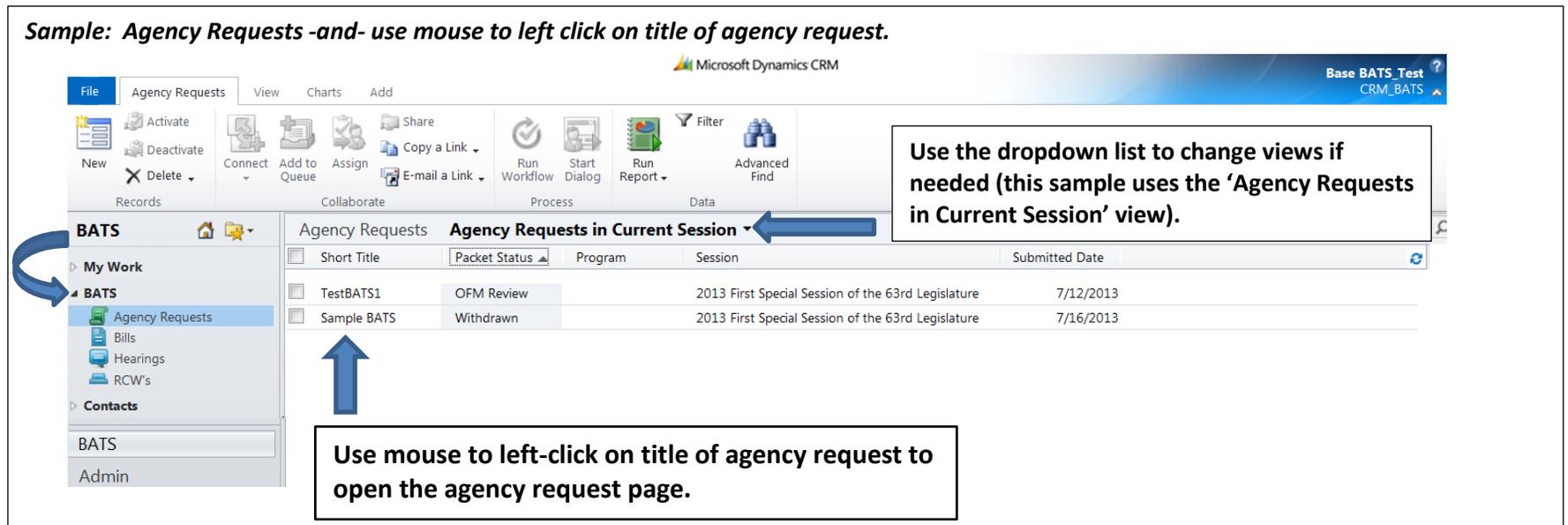
The agency request will be linked to the business unit associated with the 'owner' of the agency request.

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.



Microsoft Dynamics CRM

Base BATS_Test CRM_BATS

File Agency Requests View Charts Add

Activate Deactivate New Delete Connect Add to Queue Assign Copy a Link E-mail a Link Run Workflow Start Dialog Run Report Filter Advanced Find

Records Collaborate Process Data

BATS

My Work

BATS

Agency Requests

Bills

Hearings

RCW's

Contacts

BATS

Admin

Agency Requests **Agency Requests in Current Session**

Short Title	Packet Status	Program	Session	Submitted Date
TestBATS1	OFM Review		2013 First Special Session of the 63rd Legislature	7/12/2013
Sample BATS	Withdrawn		2013 First Special Session of the 63rd Legislature	7/16/2013

Use the dropdown list to change views if needed (this sample uses the 'Agency Requests in Current Session' view).

Use mouse to left-click on title of agency request to open the agency request page.

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.

The screenshot shows the Microsoft Dynamics CRM interface for an Agency Request. The left navigation pane has 'Agency Requests' selected. The main area shows details for 'Sample BATS Test123'. The 'Agency Contacts' section is expanded, and a table of connected contacts is visible. A blue arrow points to the 'Agency Contacts' section header, and another blue arrow points to the 'Test Contact 1 BATS' entry in the table. A third blue arrow points to the 'Connected To' column header.

Connected To	Role (To)	Position	Description
Test Contact 1 BATS	Subject Matter Expert		

In this sample, the Agency Contacts section has been selected and the system displays an input box for contacts to be connected.

In this sample, 'Test Contact 1 BATS' has been connected to agency request.

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'.

The screenshot shows the Microsoft Dynamics CRM interface. On the left, the 'Connect To' form has fields for 'Name *', 'Position *', and 'Description'. The 'Name' field has a blue arrow pointing to it from a text box below. The 'As this role' dropdown menu has a blue arrow pointing to it from another text box below. On the right, a 'Look Up Record' dialog box is open, showing a list of roles. The 'Subject Matter Expert' role is selected, and a blue arrow points from this selection to the 'As this role' field in the form.

Name	Connection Role Category	Status
<input type="checkbox"/> Secondary Bill Sponsor	Business	Active
<input type="checkbox"/> Secondary Bill Sponsors	Business	Active
<input type="checkbox"/> Subject Matter Experts	Business	Active
<input type="checkbox"/> Analysis Contacts	Business	Active
<input type="checkbox"/> Primary Bill Sponsor	Business	Active
<input type="checkbox"/> Primary Bill Sponsors	Business	Active
<input type="checkbox"/> Stakeholders	Business	Active
<input checked="" type="checkbox"/> Subject Matter Expert	Business	Active
<input type="checkbox"/> Analysis Contact	Business	Active
<input type="checkbox"/> Stakeholder	Business	Active

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

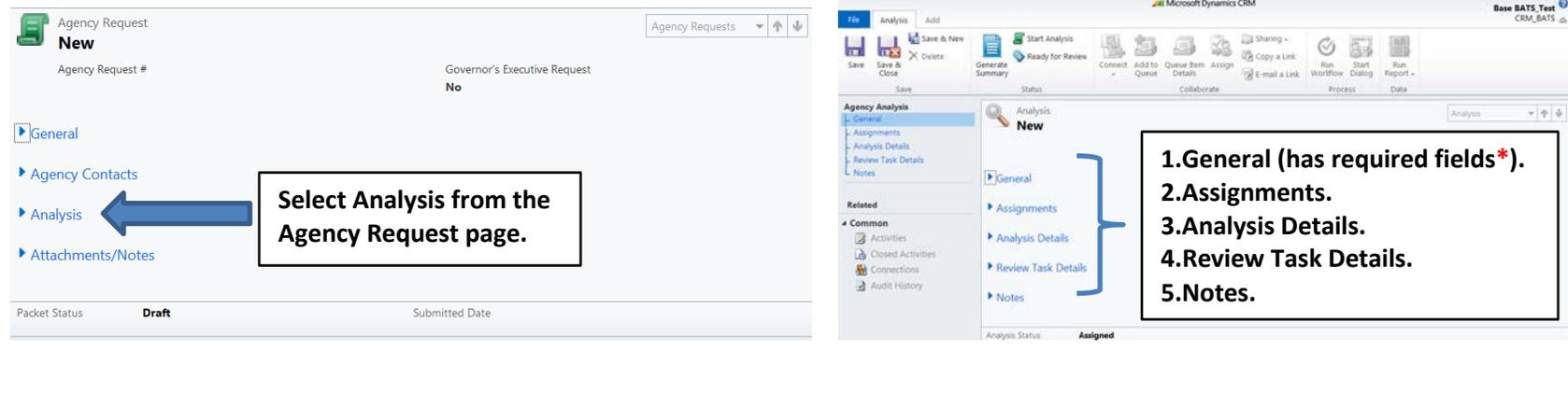
Input value for 'as this role'. Use Look Up to search for role.

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.



Select Analysis from the Agency Request page.

1. General (has required fields*).
2. Assignments.
3. Analysis Details.
4. Review Task Details.
5. Notes.

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).

Analysis New

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

Agency Request: Sample BATS Test123

Analysis Name*: Analysis Record 1 for Sample BATS Test123

Lead Analysis? No Yes

Program/Division: [Look Up]

Division Coordinator: [Look Up]

Preparer: [Look Up]

Preparer Due Date: [Calendar]

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.

The screenshot shows the Microsoft Dynamics CRM interface for the 'Base BATS Test CRM_BATS' system. The 'Analysis' ribbon is active, and the 'Assignments' section is selected in the left navigation pane. The main area displays 'Analysis Record 1 for Sample BATS Test123' with the 'Assignments' section expanded. A table with the following columns is visible:

Reviewer	Assigned	Due Date
Base BATS_Test	Assigned	8/30/2013
	Not assigned	

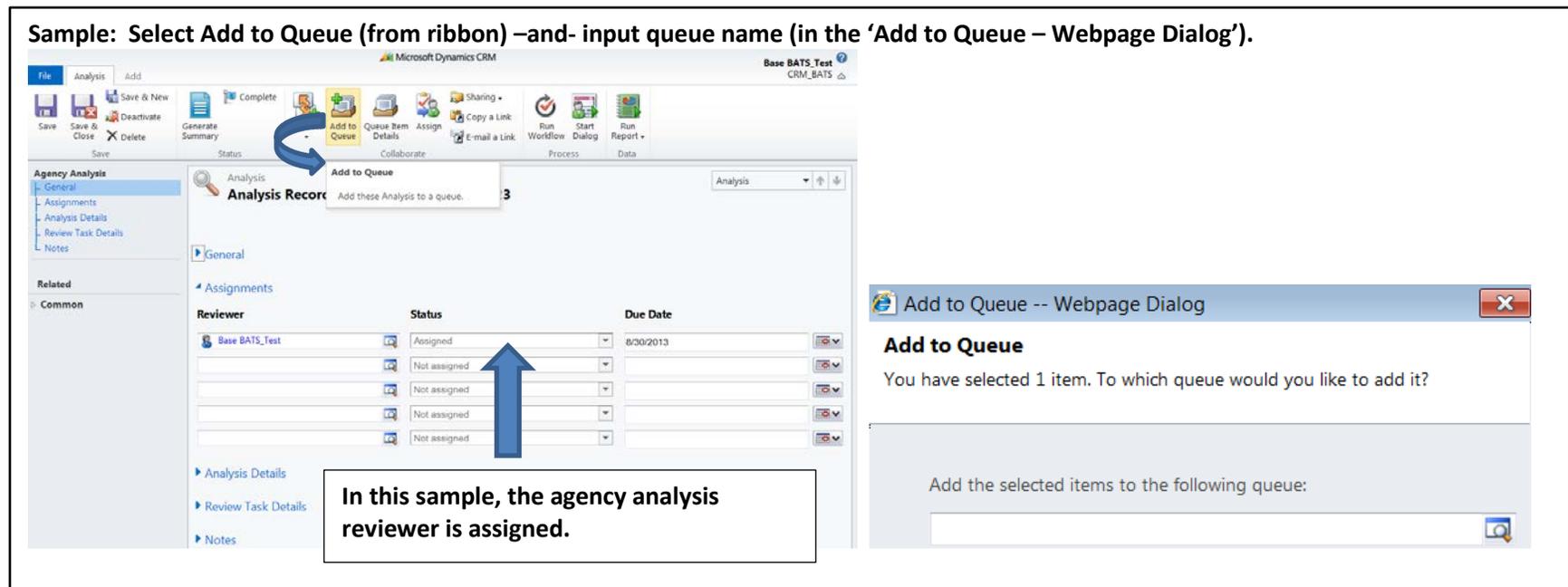
In this sample, the Assignments section has been selected and the system displays an input box for agency reviewer assignments to be added.

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').



The screenshot shows the Microsoft Dynamics CRM interface. The ribbon at the top includes the 'Add to Queue' button, which is highlighted with a blue arrow. Below the ribbon, the 'Analysis Record' is displayed with a table of assignments. The first row shows the reviewer 'Base BATS_Test' with a status of 'Assigned' and a due date of '8/30/2013'. A blue arrow points to this row. A text box at the bottom of the screenshot states: "In this sample, the agency analysis reviewer is assigned." To the right, the 'Add to Queue -- Webpage Dialog' is open, showing the prompt: "Add to Queue. You have selected 1 item. To which queue would you like to add it?" and a text input field for the queue name.

Reviewer	Status	Due Date
Base BATS_Test	Assigned	8/30/2013
	Not assigned	

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.

The screenshot shows the Microsoft Dynamics CRM interface. On the left, the 'Agency Request Information' pane is open, showing a record for 'Sample BATS Test123'. The 'Analysis' section is expanded, and a table lists one analysis record: 'Analysis Record 1 for Sample BATS T...'. A blue arrow points to the analysis name in this table. On the right, the ribbon bar is shown with the 'Start Analysis' button highlighted. A blue arrow points from the 'Start Analysis' button in the ribbon to the analysis record in the table.

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.

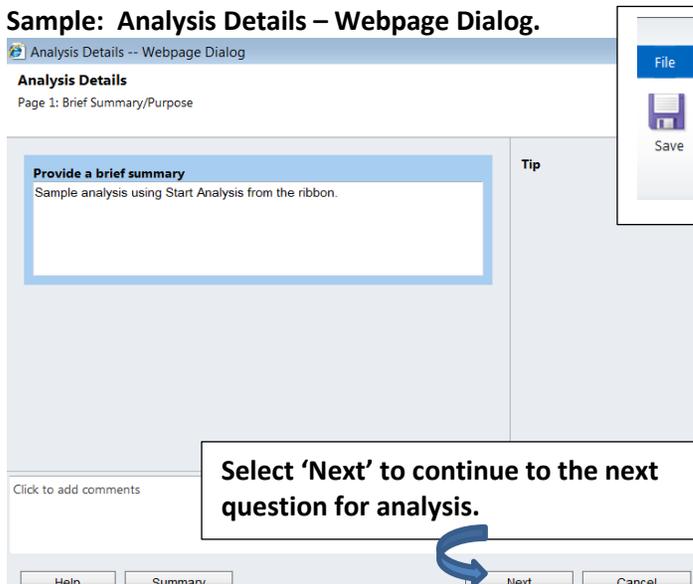
Start Analysis (continued)

To start the analysis:

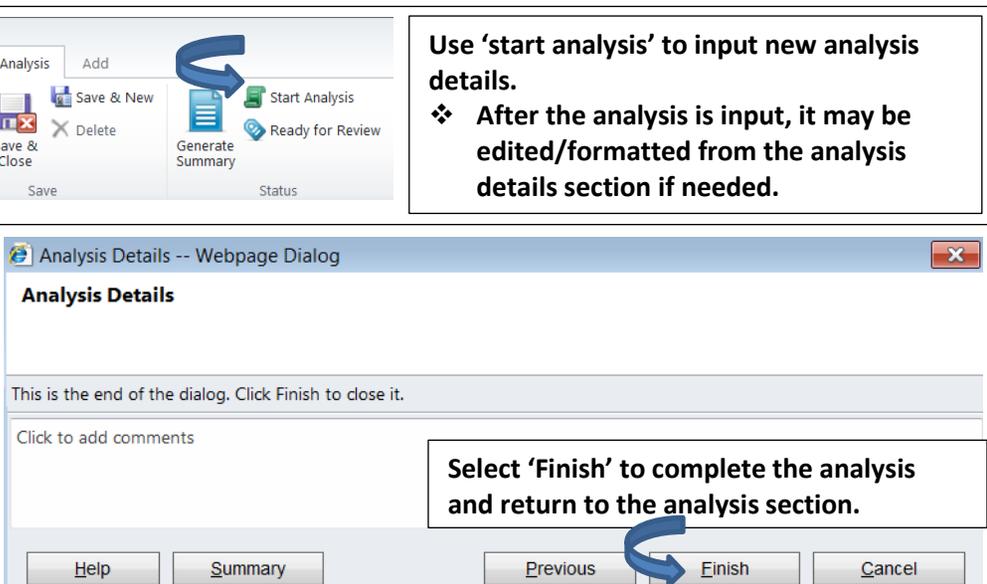
1. **Select:** Analysis section within the agency request.
2. **Scroll:** To find agency analysis.
3. **Select:** Agency analysis (use the mouse to left-click analysis name).
4. **Select:** Start Analysis (from the ribbon). The system will open the 'Analysis Details – Webpage Dialog' to prompt for information 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.

Sample: Analysis Details – Webpage Dialog.



Select 'Next' to continue to the next question for analysis.



Select 'Finish' to complete the analysis and return to the analysis section.

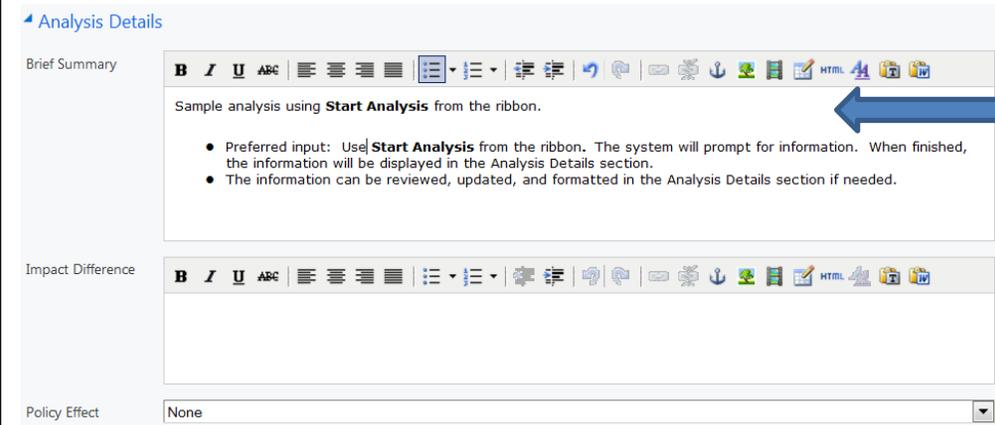
Use 'start analysis' to input new analysis details.

- ❖ After the analysis is input, it may be edited/formatted from the analysis details section if needed.

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.



Analysis Details

Brief Summary

Sample analysis using **Start Analysis** from the ribbon.

- Preferred input: Use **Start Analysis** from the ribbon. The system will prompt for information. When finished, the information will be displayed in the Analysis Details section.
- The information can be reviewed, updated, and formatted in the Analysis Details section if needed.

Impact Difference

Policy Effect: None

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.

Notes and/or documents may be attached to the analysis for agency review. In this sample, the 'Analysis Record 1 for Sample BATS Test123' is selected so the notes will be attached to this analysis only.

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

Analysis - Review Task Details

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

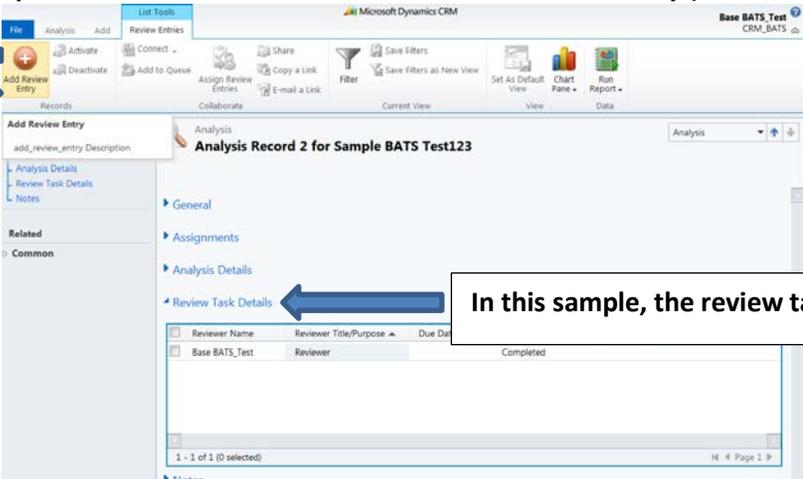
- ❖ Some agencies may use the review task details section to keep track of reviews to be completed by external reviewers (e.g. vendors or other reviewers).
- ❖ Agency reviewers may use the review task details section to update/view assigned task details.

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).



The screenshot displays the Microsoft Dynamics CRM interface. The ribbon at the top includes the 'Add Review Entry' button, which is highlighted with a blue arrow. Below the ribbon, the 'Add Review Entry' form is visible, showing the 'Review Task Details' section selected in the left-hand navigation pane. A blue arrow points to this section. A text box with a white background and black border contains the text: 'In this sample, the review task details section was selected.' Below the navigation pane, a table lists reviewer information:

Reviewer Name	Reviewer Title/Purpose	Due Date	Completed
Base BATS_Test	Reviewer		Completed

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.

The screenshot shows the 'Review Entry' form in Microsoft Dynamics CRM. The ribbon includes 'File', 'Review Entry', 'Save & New', 'Close Review Entry', 'To Opportunity', 'Promote to Response', 'Connect', 'Add to Queue', 'Queue Item Details', 'Assign', 'Sharing', 'Copy a Link', 'E-mail a Link', and 'Run Report'. A 'Mark Complete' tooltip is visible over the 'Mark Complete' button, stating: 'Save the Review Entry and change the status to Completed.' The form title is 'Review Entry Information' with a search icon and the text 'Analysis Record 2 for Sample BATS Test123'. A blue arrow points from this text to the 'Analysis Record 2 for Sample BATS Test123' link. The 'General' tab is active, showing fields for 'Owner' (Base BATS_Test), 'Reviewer Name' (Base BATS_Test), 'Reviewer Title/Purpose' (Reviewer), 'Due Date', 'Reviewed Date and Time', and 'Actual End'. A 'Mark Complete' tooltip is also visible over the 'Mark Complete' button in the ribbon.

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

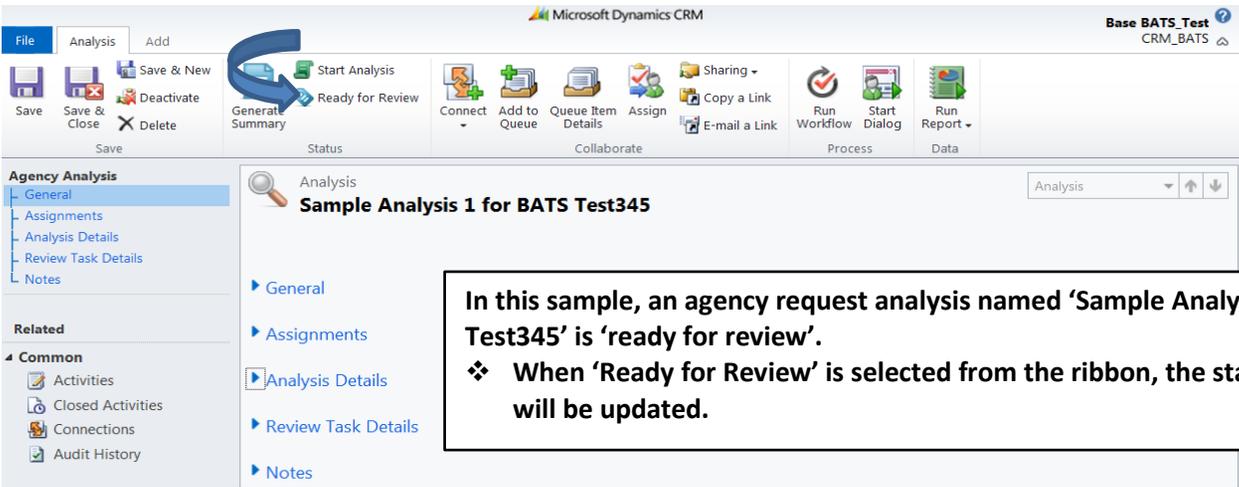
Ready for Review (from the ribbon) is used when the analysis details are completed and the information is ready to be reviewed by agency reviewers.

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.



The screenshot shows the Microsoft Dynamics CRM interface. The ribbon is set to 'Analysis' and the 'Ready for Review' option is selected. The main area displays the details for 'Sample Analysis 1 for BATS Test345'. A text box is overlaid on the screenshot, stating: '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.

Microsoft Dynamics CRM

Base BATS_Test CRM_BATS

File Agency Request Add Analysis

Activate Deactivate Connect Add to Queue Assign Analysis E-mail a Link Share Copy a Link Filter Save Filters Save Filters as New View Set As Default View Chart Pane Run Report

Records Collaborate Current View View Data

Agency Request Information

- General
- Agency Contacts
- Analysis**
- Attachments/Notes

Related

Common

Agency Request **Sample BATS Test123** Agency Requests

Agency Request # 00014 Governor's Executive Request No

General

Agency Contacts

Analysis

Analysis Name	Lead Analysis?	Preparer Due Date	Recommended Position	Analysis Status
Analysis Record 1 for Sample BATS Test123	No			In Review
Analysis Record 2 for Sample BATS Test123	No			In Review

Page 1

Attachments/Notes

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

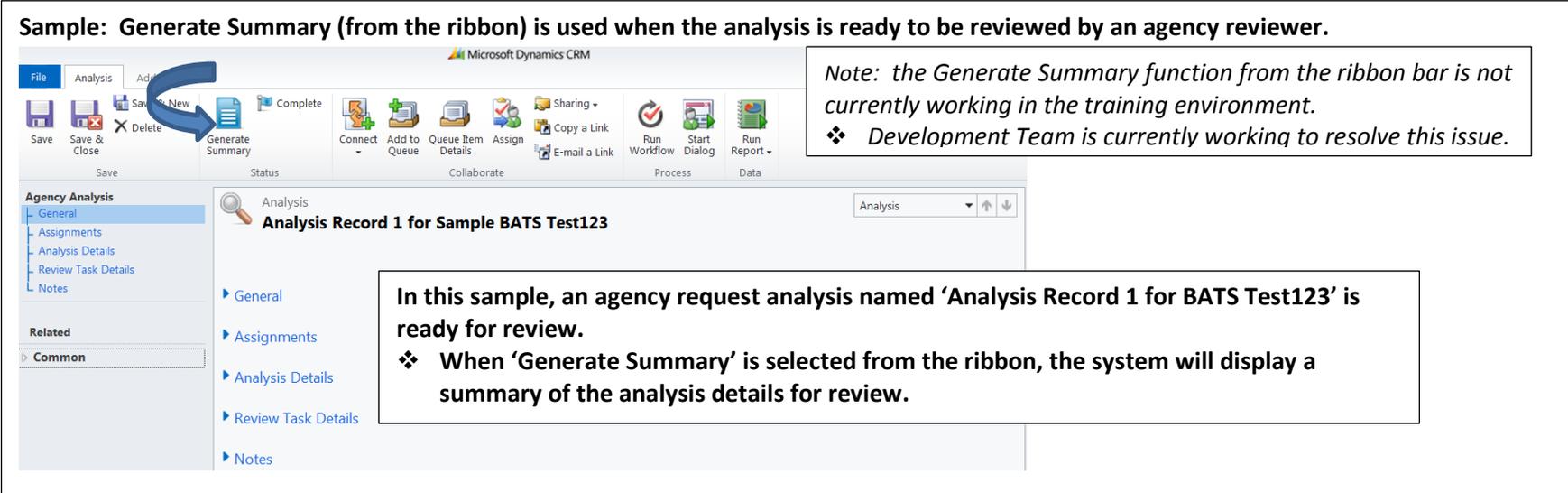
The ability to review agency analysis is based on the business unit associated with the 'owner' of the agency request. This helps to ensure that individual agencies own and control access to their information.

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

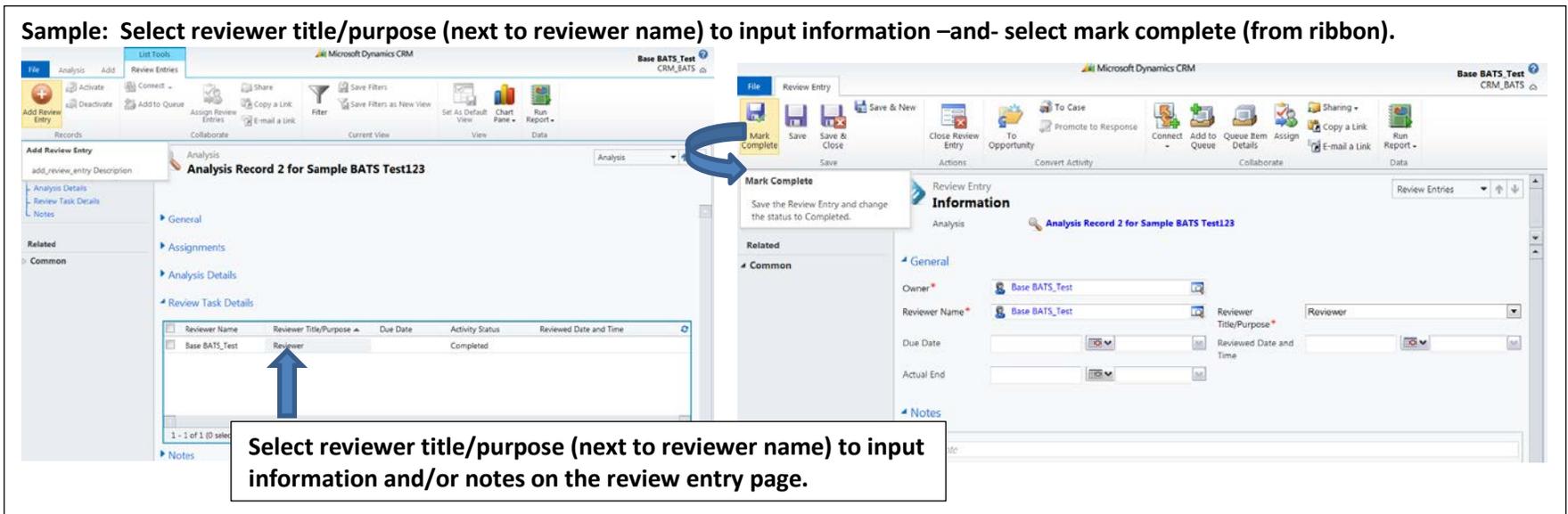
When each review task is complete, the task may be updated on the analysis to indicate the assigned task (review) is complete.

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).



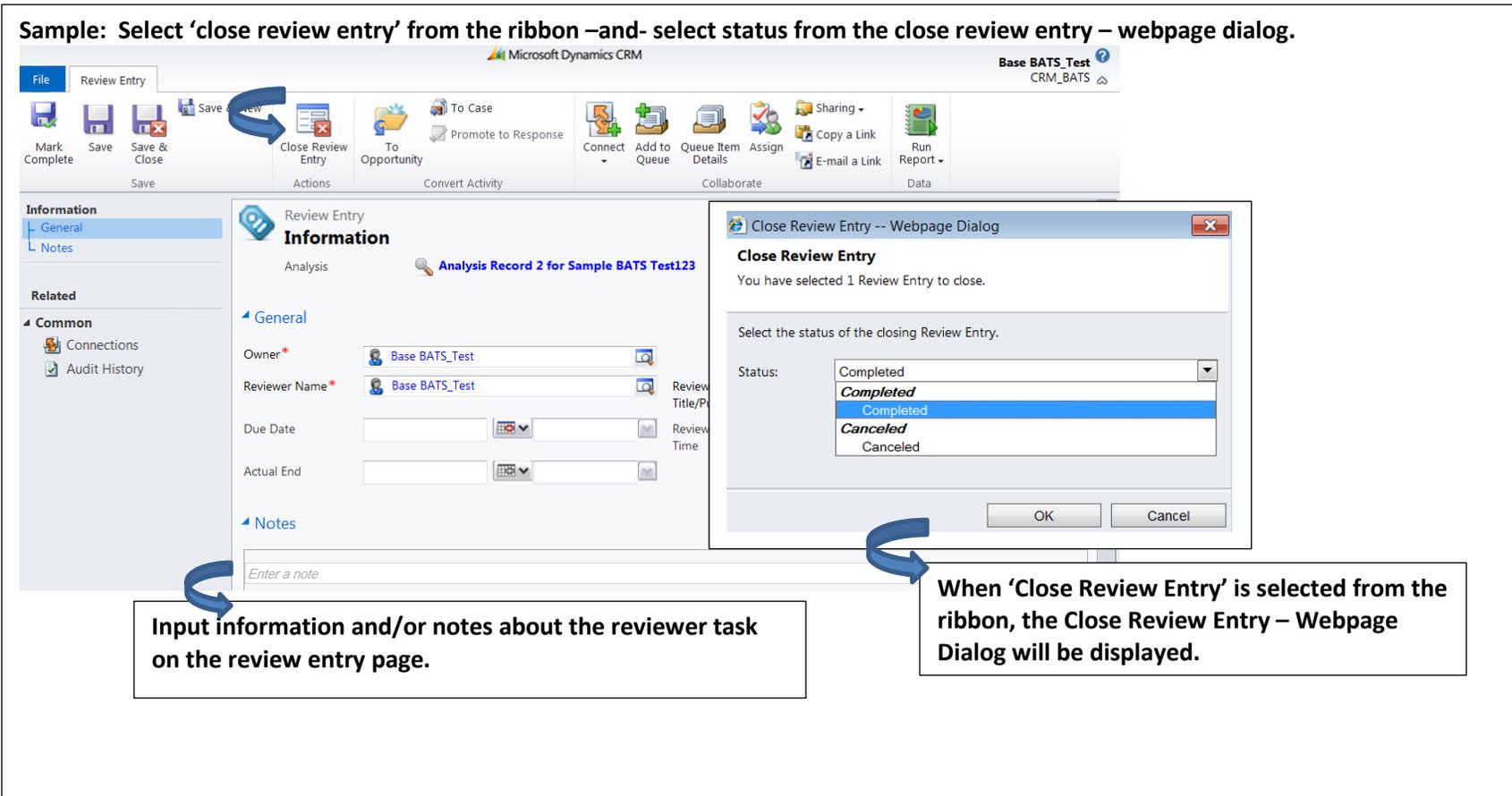
Select reviewer title/purpose (next to reviewer name) to input information and/or notes on the review entry page.

Reviewer Name	Reviewer Title/Purpose	Due Date	Activity Status	Reviewed Date and Time
Base BATS_Test	Reviewer		Completed	

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.



The screenshot displays the Microsoft Dynamics CRM interface for a 'Review Entry' record. The ribbon at the top includes the 'Close Review Entry' button, which is highlighted with a blue arrow. A callout box points to this button with the text: "When 'Close Review Entry' is selected from the ribbon, the Close Review Entry – Webpage Dialog will be displayed." Below the ribbon, the 'Information' pane shows fields for 'Owner', 'Reviewer Name', 'Due Date', and 'Actual End'. A callout box points to the 'Notes' section with the text: "Input information and/or notes about the reviewer task on the review entry page." A 'Close Review Entry -- Webpage Dialog' window is open, showing a 'Status' dropdown menu with 'Completed' selected. The dialog also contains 'OK' and 'Cancel' buttons.

Review Agency Analysis – Complete Review

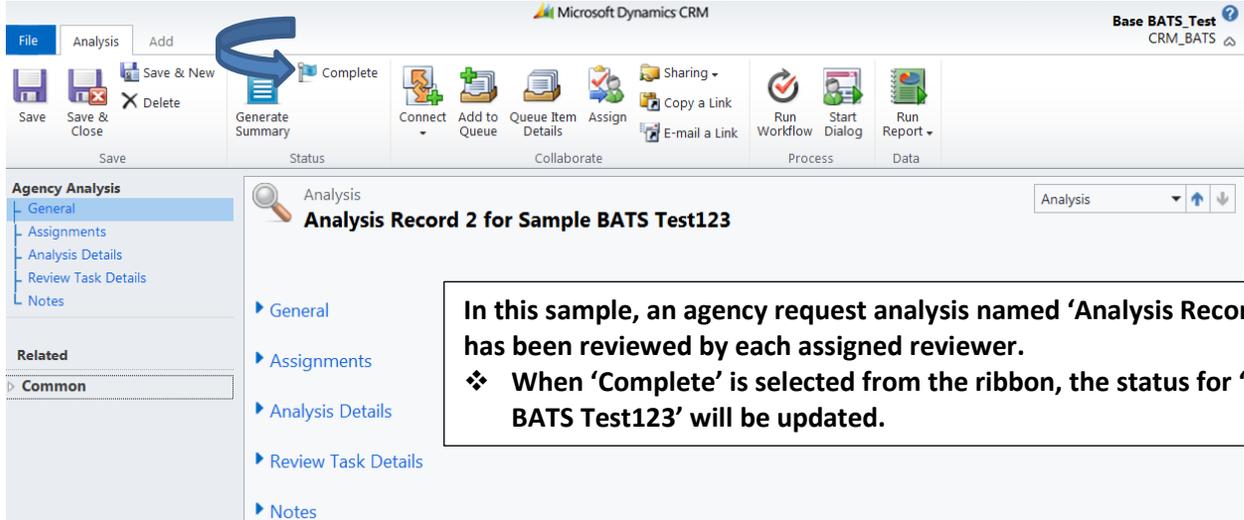
When all review tasks are complete for an analysis record, the analysis may be updated to indicate the review cycle is complete (this step is usually completed by the agency coordinator).

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.



The screenshot shows the Microsoft Dynamics CRM interface. The ribbon is set to 'Analysis' and the 'Complete' button is highlighted with a blue arrow. The main area displays 'Analysis Record 2 for Sample BATS Test123'. A text box is overlaid on the interface, explaining that the 'Complete' button is used when all reviewers have completed their review.

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.

These attachments and notes are on the agency request page (not on the agency analysis page). Notes and/or attachments on the agency request page are available to OFM. For example, a fiscal note and/or Z-draft document may be attached to the agency request page for OFM review.

Attach File Done

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).

