Washington State Department of
Enterprise Services

BATS - Overview

Bill Analysis and Tracking System (BATS)

The Bill Analysis and Tracking System (BATS) combines the ability to electronically create and submit 'agency request' legislation with flexible tracking, reporting, and analysis methods from bill origin through the legislative process.

- BATS is being implemented in three (3) phases starting August 2013. When fully implemented, it will replace legacy systems LegMon and LegTrack. Note: LegMon and LegTrack will still be available for "read only" access for historical data and reporting purposes.
- BATS training strategy will use a "Train the Trainer" model. Because BATS is being implemented in three (3) phases, the training will initially be provided in three (3) phases. Additional training and support will be provided as the system is implemented and transitioned for ongoing production support activities.
- Training information and user reference materials will be updated during each phase and posted to the DES website (www.des.wa.gov) as part of implementation activities.

Phase	Primary System Users	Description	Training and User Reference Materials
1	Cabinet Agencies	Create and Submit Agency Legislation	Available August 2013
2	All Users	Legislation Tracking	Available October 2013
3	OFM/GOV Users	Enrolled Bills	Available 4th Quarter 2013

Phase 1: Create and Submit Agency Legislation	Phase 2: Legislation Tracking	Phase 3: Enrolled Bills
❖ Overview. ❖ Help and Frequently Asked Questions (FAQs). ❖ Layout and Navigation. ❖ Look Up, Advanced Find, and Views. ❖ LogOn, LogOff, Change Password. ❖ Contacts. ❖ User Roles and Security. ❖ Programs, Divisions, Classifications. ❖ Agency Requests - Input, Analysis, Review, and Submit. ❖ Agency Requests - OFM Analysis, Review, and Submit. ❖ Agency Requests - GOV Review and Submit.	❖ Overview. ❖ Help and Frequently Asked Questions (FAQs). ❖ Layout and Navigation. ❖ Look Up, Advanced Find, and Views. ❖ LogOn, LogOff, Change Password. ❖ Contacts. ❖ User Roles and Security. ❖ Programs, Divisions, and Classifications. ❖ Dashboards. ❖ Bill Tracking. ❖ Bill Analysis and Review. ❖ Legislative Service Center (LSC), RCW's, Hearings, and Fiscal Notes	❖ Enrolled Bills. ❖ Reports.

Training information and user reference materials will be available from the DES website (www.des.wa.gov).

- IT Systems & Solutions/System Access & Support http://www.des.wa.gov/services/IT/Pages/default.aspx.

Sample: DES website under Services ('what we do and provide') / IT Systems & Solutions / System Access & Support page http://www.des.wa.gov/services/IT/Pages/default.aspx.

BATS training information will be available from 'Get training on enterprise systems' as part of implementation activities.

BATS user reference materials will be available from 'Manuals and documentation' as part of implementation activities.

Washington State Department of
Enterprise Services

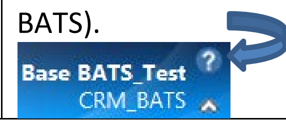
Help and Frequently Asked Questions (FAQs)
Bill Analysis and Tracking System (BATS)

The Bill Analysis and Tracking System (BATS) includes online help based on a Microsoft product called 'Dynamics CRM' (Customer Relationship Management).

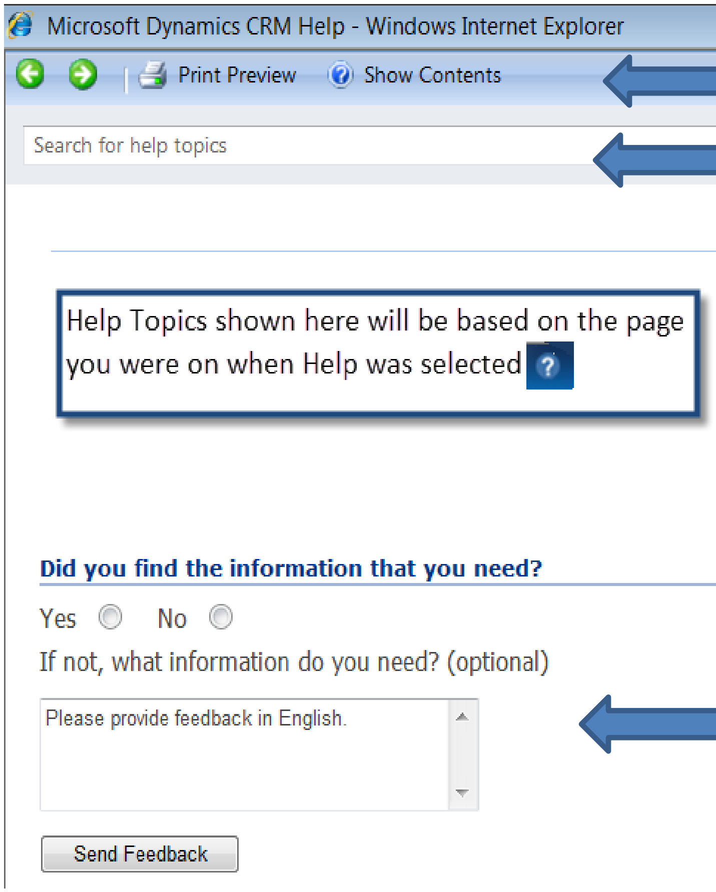
- System online help is useful for common functions such as Look Up, Advanced Find, Views, and Dashboards. This online help is based on Microsoft Dynamics CRM so it will not include BATS-specific functions or information.
- Help is available for BATS-specific information from the DES Solutions Center and DES Website. This help is based on Washington State BATS-specific information.

This document provides an overview of BATS help along with frequently asked questions (FAQs), including:
- Links to System Access & Support information.
- BATS Online Help.
- FAQs about navigation and layout, browsers/logon/passwords, functions and features.

There are several ways to get help with using BATS.

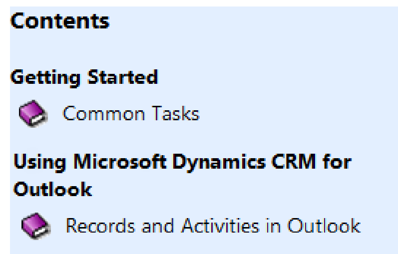
Resource	Provides	Available from
DES Solutions Center	Subject Matter Experts (SME) to support BATS users.	❖ (360) 407-9100 ❖ solutionscenter@des.wa.gov
DES Website	Links to System Access & Support information. ❖ BATS URL (links to access BATS). ❖ BATS documentation (links to BATS user reference materials and training information).	❖ http://www.des.wa.gov ❖ http://www.des.wa.gov/services/IT
System Help	Information about using Microsoft Dynamics CRM. ❖ Instructions for common BATS functions such as Look Up, Advanced Find, Views, and Dashboards.	Question mark icon (located next to user name on upper right side of each page in BATS). 

Online Help can be used to search for information about using Microsoft Dynamics CRM, including common BATS functions such as Look Up, Advanced Find, Views, and Dashboards.



Select 'Show Contents' (or use 'Search for help topics') to display information about using Common Tasks (Look Up, Advanced Find, Views, Dashboards) or MS Dynamics CRM for Outlook.

- This online help is based on Microsoft Dynamics CRM so it will not include BATS-specific functions or information.
- If you need help with BATS-specific functions, please contact DES Solutions Center (360) 407-9100 solutionscenter@des.wa.gov.



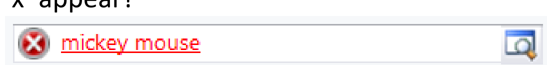
Do not use this to request information about BATS.

- This sends information to Microsoft for the Microsoft Dynamics CRM product.
- If you need information about BATS, please contact DES Solutions Center (360) 407-9100 solutionscenter@des.wa.gov.

Frequently asked questions (FAQs) about BATS layout, navigation, functions and features.

FAQ Topic	Question	Answer
Agency Request	Where is the 'checklist' for agency packets in BATS?	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.
Agency Request	Can an Agency Request have more than one analysis?	Yes. Agencies may add multiple analysis records to their Agency Request.
Layout/Navigation	When does the ribbon bar change to display additional functions or actions?	The ribbon bar (menu bar) will change depending on which BATS page is displayed. ❖ Navigate (move) to a different page and the ribbon bar will change. ❖ Sometimes a specific section on a page needs to be selected so that the ribbon bar will display functions or actions for that section. For example, navigate (move) to an Agency Request page or Bill page and select the 'Analysis' section so that the 'Add New Analysis' function is displayed on the ribbon bar.
Layout/Navigation	How do the lists or items on a page get refreshed?	BATS uses standard Microsoft refresh functions. ❖ Use the refresh icon available from some of the pages . ❖ Use F5 (shortcut key). ❖ Right-click within the page or list then select refresh.
Layout/Navigation	Will all activities or tasks be in a list or just the ones assigned to a specific user?	Depends on which view is being used. ❖ Use the dropdown list to change views if needed.

FAQ Topic	Question	Answer
Layout and Navigation	What's the difference between Activities and Queues?	Activities and Queues provide flexible ways to organize or manage actions (tasks or assignments). ❖ Activities page may be used to view (display) lists of items. For example, 'My Open Activities' or 'My Closed Activities' are system views that may be available from a dashboard and/or from the Activities page. ❖ Activities may be used to assign or manage actions (tasks or assignments) such as e-mails, phone calls, letters, faxes, and appointments. These may be assigned from the ribbon bar by navigating to the Activities page. ❖ Queues page may be used to view (display) lists of items. For example, 'All Items' or 'Items available to work on' are system views that may be available from a dashboard and/or from the Queues page. ❖ Queues may be used to assign or manage actions (tasks or assignments) such as an agency analysis or review. These may be assigned from the ribbon bar when available for example, on the analysis page or review task details). Some queue items may be assigned from the system (for example, when the first reviewer marks their task compete, then the system will automatically update the review queue for the second reviewer).
Layout/Navigation	Why is the Microsoft Dynamics CRM logo displayed in BATS? Microsoft Dynamics CRM	BATS was developed using a Microsoft product called Dynamics CRM (Customer Relationship Management).
Layout/Navigation	Why is some of the Microsoft Dynamics CRM functionality available in BATS?	BATS was developed using a Microsoft product called Dynamics CRM (Customer Relationship Management).
Layout/Navigation	Why do some fields have a red asterisk '*' and some fields have a blue plus-sign '+' next to them?	❖ Red asterisk '*' = required field. ❖ Blue plus-sign '+' = indicates OFM designated reporting field.

FAQ Topic	Question	Answer
LogOn, LogOff, Change Password	What's the process for creating a SAW account for users who will access BATS outside of the State Government Network (SGN)?	Secure Access Washington (SAW) accounts are administered by Consolidated Technology Services (CTS). ❖ Information about SAW Frequently Asked Questions (FAQs) is available from http://support.secureaccess.wa.gov/. ❖ Information about creating a SAW account is available for new users from https://crm.des.wa.gov (select Secure Access Washington from the dropdown). On the SAW Login page, CTS provides a link to create a SAW account (along with links to SAW help topics for userids, passwords, account activation, and general help with SAW-related information).
Look Up, Advanced Find, and Views	What's the difference between Look Up, Advanced Find, and Views?	Look Up, Advanced Find, and Views are different ways to search for some of the values (data) in BATS. ❖ Look Up is available on some of the fields. It is used to look for a value associated with a specific field (e.g., legislative session, business unit, program, division). ❖ Advanced Find is available on the ribbon (menu bar). It is used to search for values and activities. Results may be saved as a 'view' (personal view) to be used on some of the pages. ❖ Views are available on some of the pages. They are located in dropdown lists (e.g., active external entities, inactive external entities, all external entities) and may be used to display a list of values associated with a page.
Look Up, Advanced Find, and Views	When typing (inputting) a value in a field that has a Look Up function, why does a red circle with an 'x' appear? 	The red circle with an 'x' indicates an error occurred because the value is not found in Look Up or search results. ❖ To clear (remove) the error, delete the values in the field. The field will be cleared so that another value may be input. ❖ To avoid receiving this error, use the Look Up icon next to the field to search for a valid value.

FAQ Topic	Question	Answer
Programs, Divisions, and Classifications	Are agencies required to setup Programs, Divisions, and Classifications?	No. They are optional (not required). ❖ Agencies may use these to help identify specific areas associated with their bill-related information. For example, an agency may want to track all of their requests associated with '*Program A*' or '*Division 123 in Program A*'; or track bills associated with a classification of '*Education'* or '*Health'*. ❖ Agencies may save time by using a Program to pre-fill (default) some of the fields used with bill-related information. For example, Programs may be setup to include up to 5 default agency reviewers. Agencies may setup reviewers to default from a Program instead of inputting the reviewer information for each agency analysis assignment.
Security	What user name is input when setting up a new user?	NetworkLogonID –or- Domain\NetworkLogonID ❖ Examples: BaseBATSTest –or- OFM\BaseBATSTest. To find a NetworkLogonID, use the Global Address List in Outlook. In Outlook, lookup the name of the person and view the properties associated with that person (in some agencies, the Logon Alias shown in the Outlook properties is the NetworkLogonID). Note: Secure Access Washington (SAW) user name is the email that is registered with SAW account. ❖ Example: username@emailDomain.gov.

FAQ Topic	Question	Answer
Security	Why are some functions in BATS greyed out (not accessible)?	❖ Some functions may be greyed out because they are not applicable at a certain step in the process. For example, ‘submit’ may not be a valid function if the agency packet has not yet been saved. ❖ Some functions may be greyed out because the role assigned does not permit use of that function. If needed, contact your Agency Administrator.
System Performance	BATS seems to be stuck on the same page. It looks like there’s a ‘loading’ message displayed continuously on the page.	A ‘loading’ message may be displayed continuously if the Internet Explorer ‘back button’ was used. To move to another area or page, select a function within BATS from the ribbon bar or left-side navigation pane.
Training	What kind of training is available for BATS?	Information is available from DES Website under IT Systems & Solutions http://www.des.wa.gov/services/IT. ❖ BATS training information will be available from ‘Get training on enterprise systems’ as part of implementation activities. ❖ BATS user reference materials will be available from ‘Manuals and documentation’ as part of implementation activities.

The Bill Analysis and Tracking System (BATS) was developed using a Microsoft product called 'Dynamics CRM' (Customer Relationship Management). Instead of managing information related to marketing or sales-related processes, BATS will manage information related to legislative processes.

- Moving around in BATS is very similar to moving around in other Microsoft products (ribbon or menu bars with icons and tabs, scroll bars, dropdown lists).
- Using functions in BATS is very similar to using functions in other Microsoft products (select checkboxes, expand lists to see other options or functions, search, lookup, using multiple windows/browser sessions).
- Required fields in BATS are identified with a red asterisk '*'.

This document provides an overview of BATS navigation and basic functions, including:

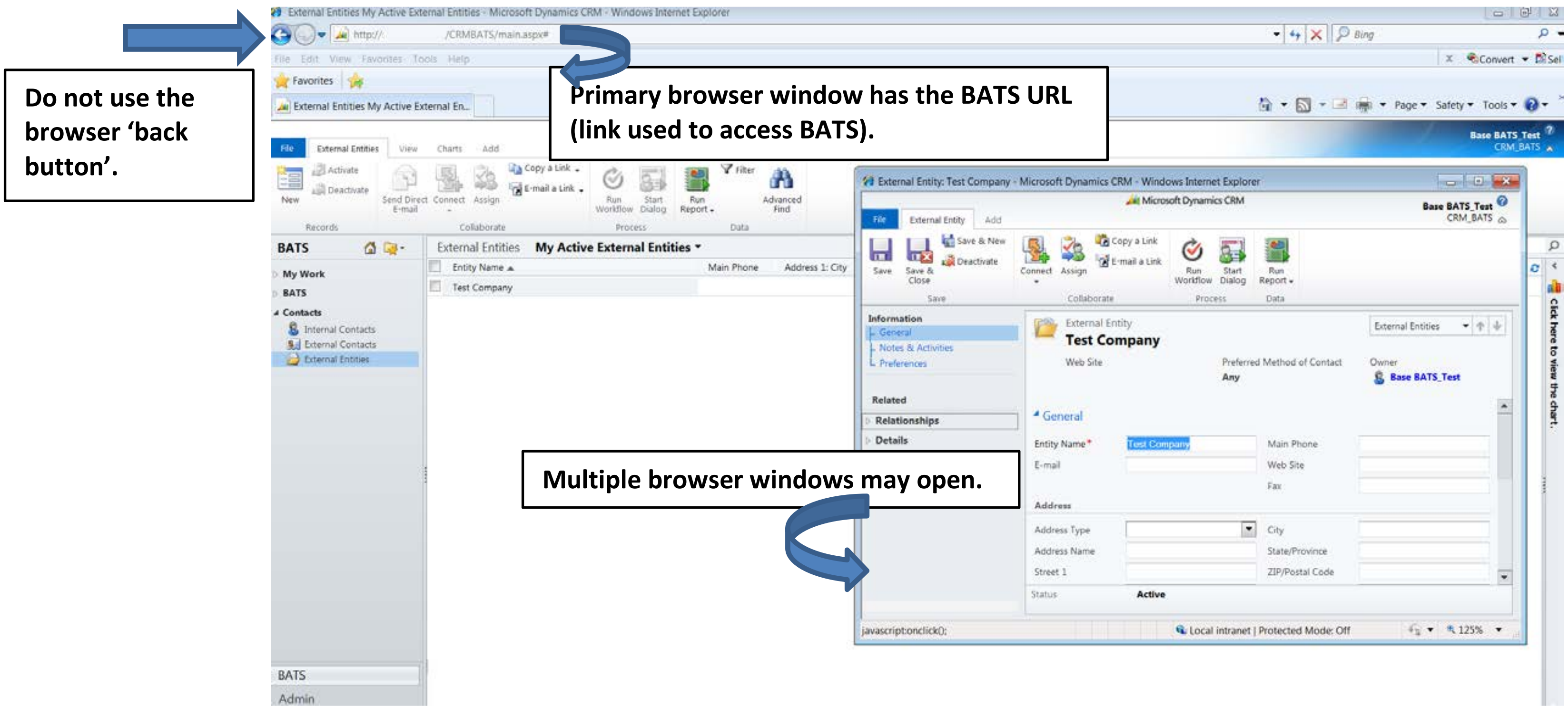
- Internet Explorer (IE) Browser.
- Ribbon Bar (menu bar).
- Left-Side Navigation Pane.
- Left-Side Page Navigation.
- Top and Bottom Page Identification and Status.

Internet Explorer (IE) Browser

An internet browser is required to logon to BATS. Internet Explorer version 7 or above is recommended. Note: other browsers are not currently supported.

- ❖ Multiple browser windows may open. The primary window will include the BATS URL (link used to access BATS).
- ❖ Do not use the browser back button within BATS. Use the BATS functions to move around (navigate) within BATS. A 'loading' message may be continuously displayed if the browser 'back button' is used (to stop the 'loading' message, select any function within BATS from the ribbon bar or left-side navigation pane).

Sample: Internet Explorer 'back button' (do not use) –and- multiple browser windows.

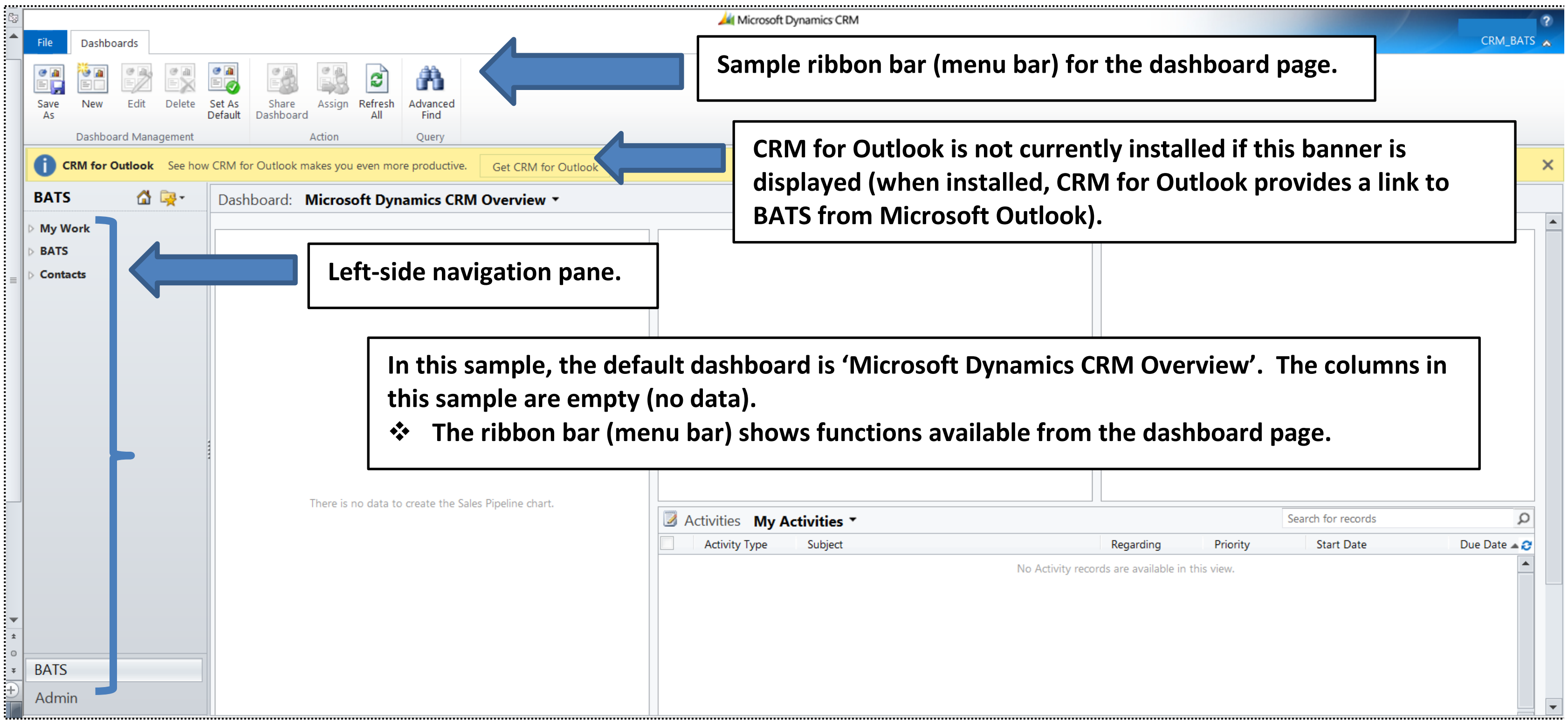


Ribbon Bar

The ribbon bar (menu bar) will change depending on which BATS page is displayed.

- ❖ The dashboard page will be displayed first after logging on to BATS because it is currently set as the system 'default' page.
- ❖ Access to specific functions within BATS is controlled by user roles.

Sample: Ribbon bar from the Dashboard page.



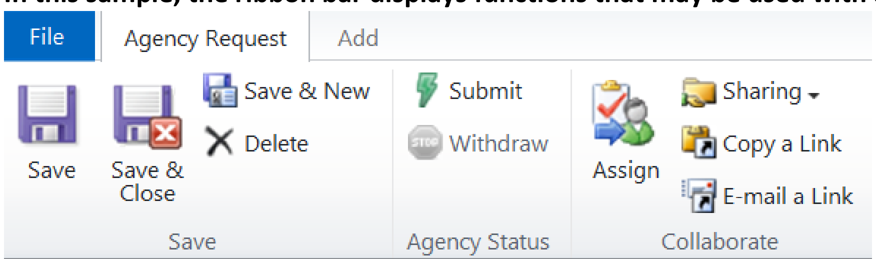
Ribbon Bar (continued)

The ribbon bar (menu bar) will change depending on which BATS page is displayed.

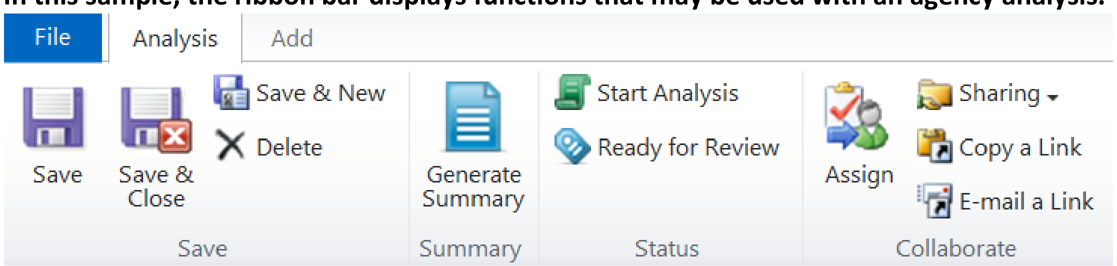
❖ Access to specific functions within BATS is controlled by user roles.

Sample: Ribbon bar from an Agency Request page, an Agency Analysis page, and a Bill page.

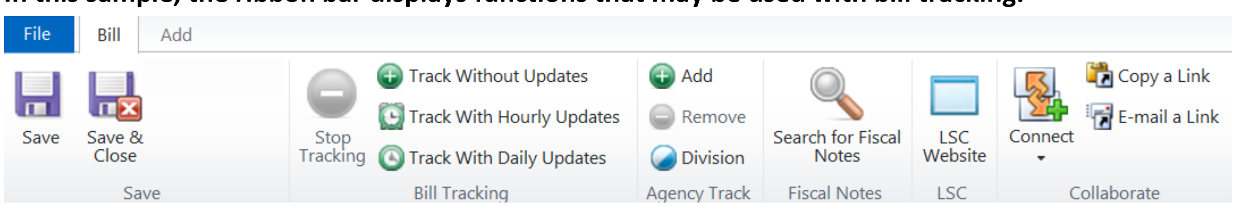
In this sample, the ribbon bar displays functions that may be used with an agency request.



In this sample, the ribbon bar displays functions that may be used with an agency analysis.



In this sample, the ribbon bar displays functions that may be used with bill tracking.



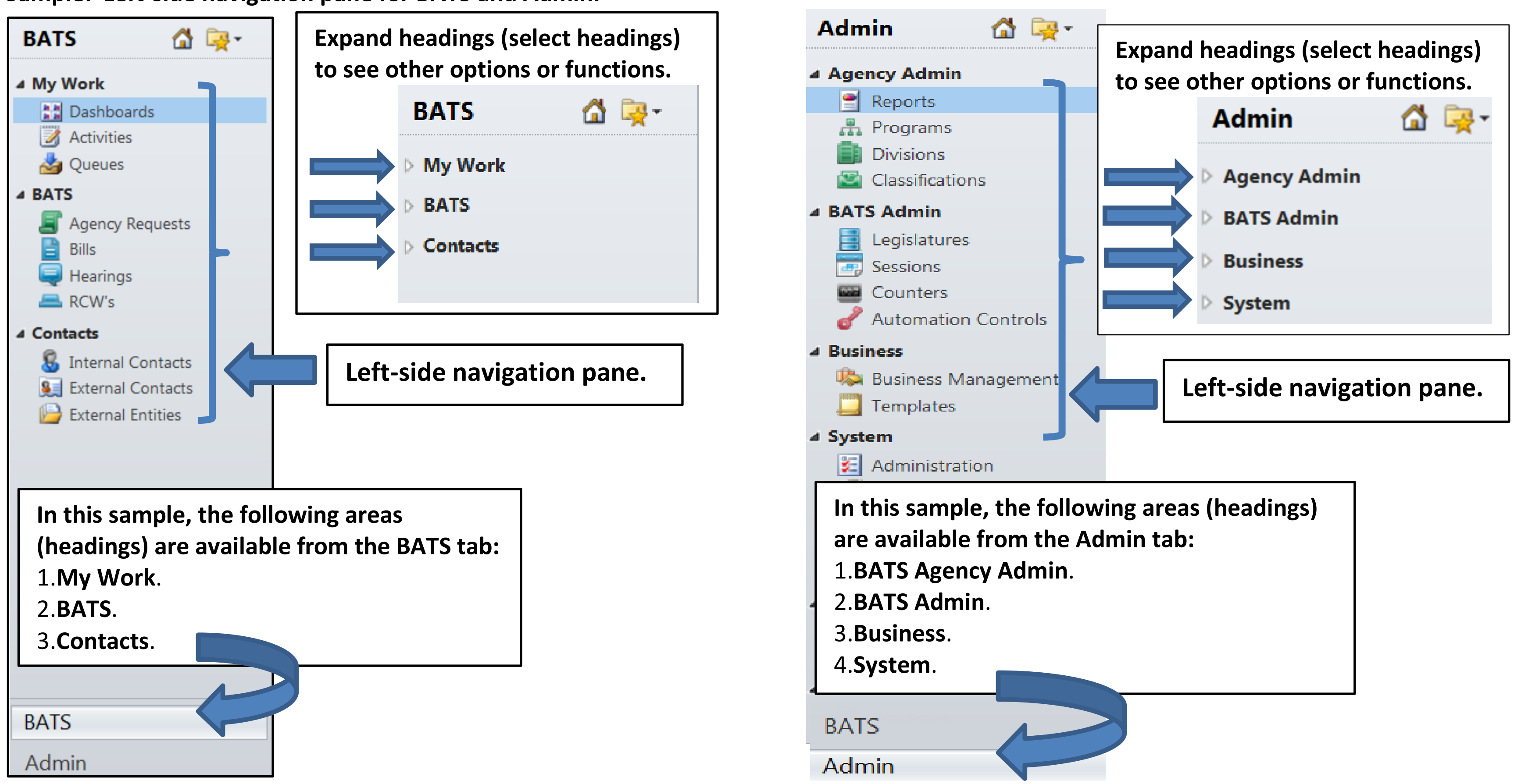
The ribbon bar will change depending on which BATS page is displayed.

Left-Side Navigation Pane

The left-side navigation pane will change depending on which BATS page is displayed.

- Expand areas to display (view) other options or functions (use the mouse to left-click on heading to expand).
- Access to specific functions within BATS is controlled by user roles.

Sample: Left-side navigation pane for BATS and Admin.

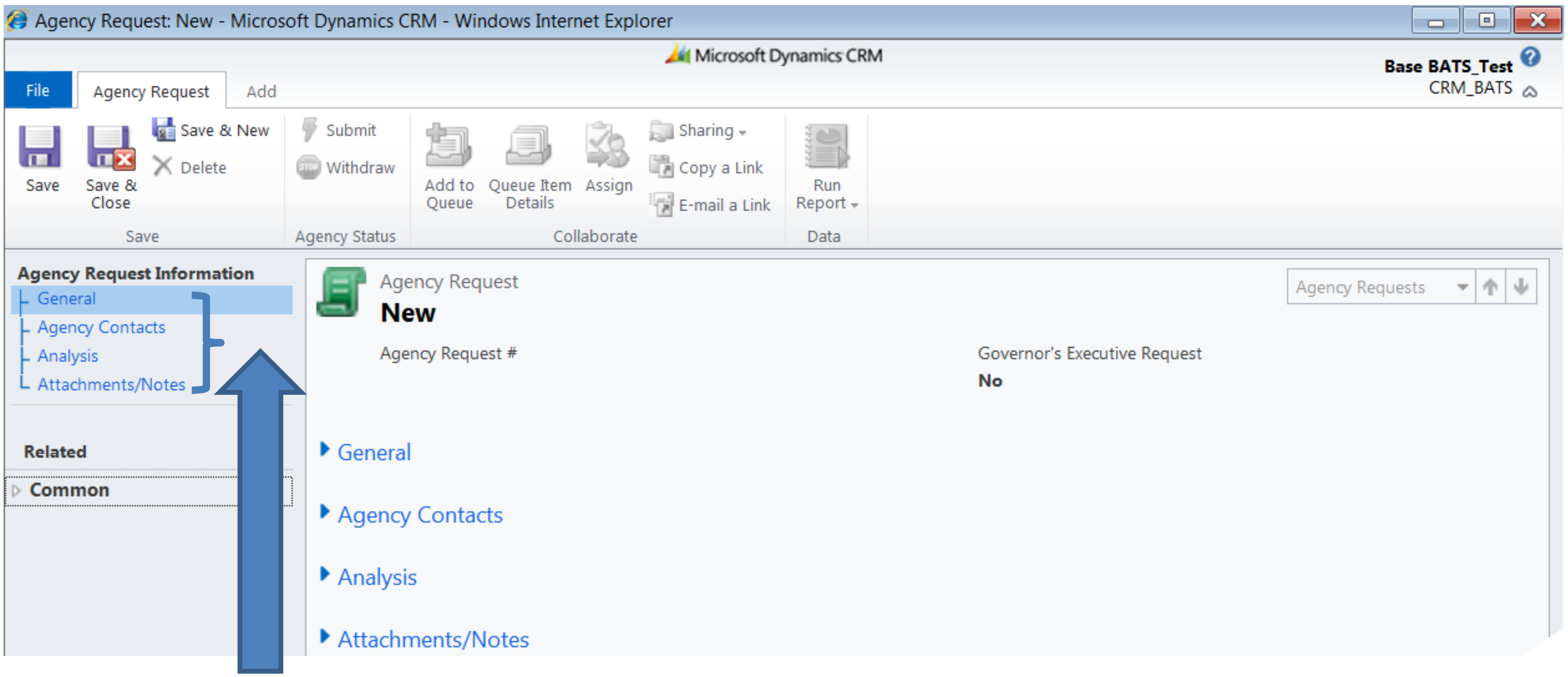


Left-Side Page Navigation

The left-side page navigation will change depending on which BATS page is displayed.

- Provides a quick way to move around (navigate) within a page.

Sample: Left-side page navigation.



In this sample, the left-side page navigation provides a quick way to move around (navigate) within an Agency Request page.

- **Select headings and the system will open that section on the page. For example, select 'Analysis' and the system will open the analysis section on the Agency Request page.**

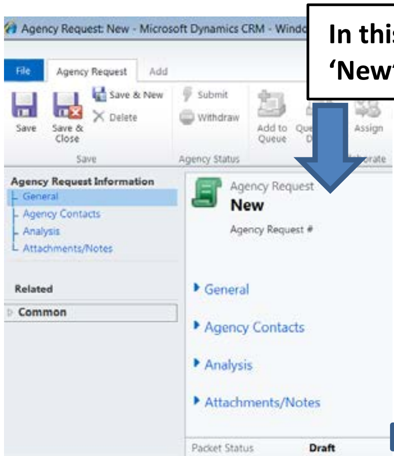
Top and Bottom Page Identification and Status

The top and bottom page identification and status will change depending on which BATS page is displayed.

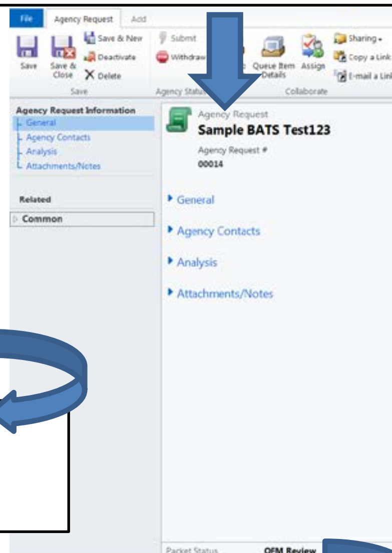
- ❖ Provides a quick way to identify which page is displayed.
- ❖ Provides a quick way to identify status (if applicable).

Sample: Page identification and status.

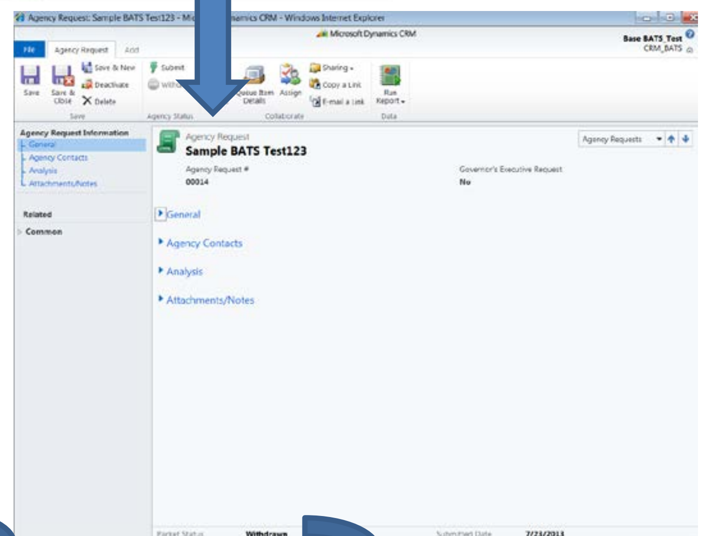
In this sample, the page identification is Agency Request. The title of the Agency Request is 'New' until it is saved with a name (Agency Request 'Sample BATS Test123').



In this sample, Agency Request was input and saved.
❖ Status is "Draft".



In this sample, Agency Request was submitted to OFM for review.
❖ Status is "OFM Review".



In this sample, Agency Request was withdrawn because the agency needed to make a change after it was submitted to OFM for review.
❖ Status is "Withdrawn".

The Bill Analysis and Tracking System (BATS) provides flexible search options for finding bill-related information. These options use standard Microsoft functions such as Look Up, Advanced Find, and Views.

- System online help is useful for common functions such as Look Up, Advanced Find, and Views. This online help is based on Microsoft Dynamics CRM so it will not include BATS-specific functions or information.

Type	Description
Look Up	Look Up is available on some of the fields. ❖ Look Up icon is located next to a field. ❖ Look for a value associated with a specific field (for example, legislative session, business unit, program, division).
Advanced Find	Advanced Find is available on some of the pages. ❖ Advanced Find icon is located on the ribbon bar (menu bar). ❖ Search for values and activities across fields and pages. ❖ Save results as a 'view' (personal view) to be used on some of the pages. ❖ Share saved search (personal view) with other users.
Views	Views are available on some of the pages. ❖ Views are located in dropdown lists (e.g., active external entities, inactive external entities, all external entities). ❖ Views display a list of values associated with a page. These values may be selected from the list (use mouse to left-click the value). ❖ Types of views available on a page will change depending on which page is displayed (e.g., view for internal contacts will be available on internal contact page but not on external contact page).

This document provides an overview of BATS search options, including:

- Look Up.
- Advanced Find.
- Views (System Views and Personal Views).

Look Up

Look Up may be used to look for (search) a value associated with a specific field.

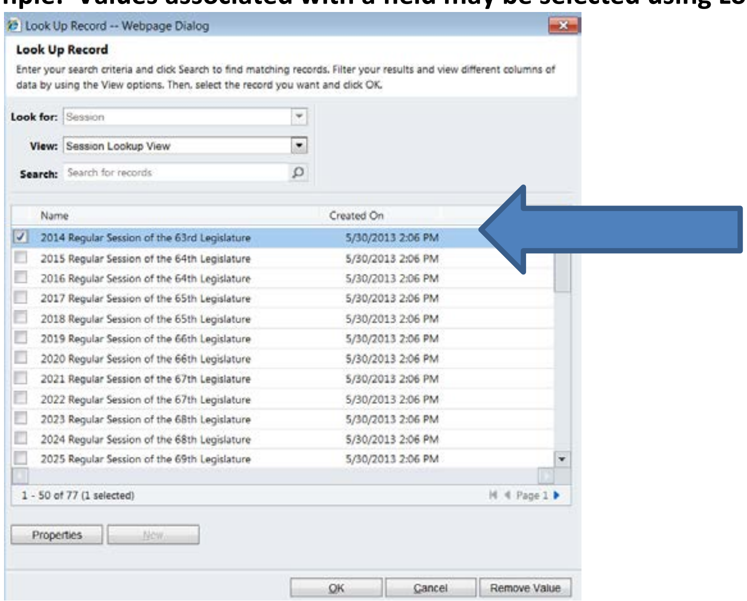
- ❖ Look Up is available on some of the fields.
- ❖ Look Up icon is located next to a field.

To use Look Up for values associated with a field:

1. **Select:** Look Up icon (located next to a field).
2. **Select:** Checkbox (next to the value from Look Up Criteria - Webpage Dialog). Note: when the Look Up icon next to a field is selected, the criteria for that field will be displayed by default in Look Up Criteria - Webpage Dialog.
3. **Select:** OK (from Look Up Criteria - Webpage Dialog).

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

Sample: Values associated with a field may be selected using Look Up Record - Webpage Dialog.



In this sample, the Look Up icon was used on an agency request page to look for a legislative session value. The criteria for the field defaulted to "Session Look Up View" and the values associated with legislative sessions are displayed.

- ❖ **The checkbox next to 2014 Regular Session of the Legislature is selected. After 'OK' is selected, the system will input '2014 Regular Session of the Legislature' as the value on the agency request page.**

Advanced Find

Advanced Find may be used to search for records, activities, or saved views across fields and pages.

- ❖ Advanced Find is available on some of the pages.
- ❖ Advanced Find icon is located on the ribbon bar (menu bar).
- ❖ Results may be saved as a 'view' (personal view) to be used on some of the pages.

To use Advanced Find to search for records, activities, or saved views across fields and pages:

1. **Select:** Advanced Find (from the ribbon bar).
2. **Select:** Criteria to use for the search. Note: when the Advanced Find icon on the ribbon bar is selected, the current view for that page will be displayed by default.
3. **Select:** Results (from the ribbon bar).

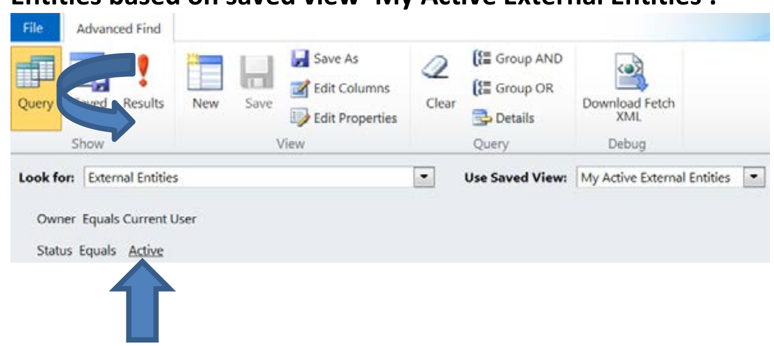
☑**Result**: Values matching the advanced find criteria are displayed. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Advanced Find (from the ribbon bar).

In this sample, Advanced Find was selected from the External Entities page.

- ❖ **Advanced Find criteria and values will be associated with External Entities. Use the dropdown to change views if needed.**

In this sample, the Advanced Find will look for External Entities based on saved view 'My Active External Entities'.



Select criteria value for 'Status Equals' by using the mouse to left-click 'Active' (the system will display a dropdown list with values).

Advanced Find (continued)

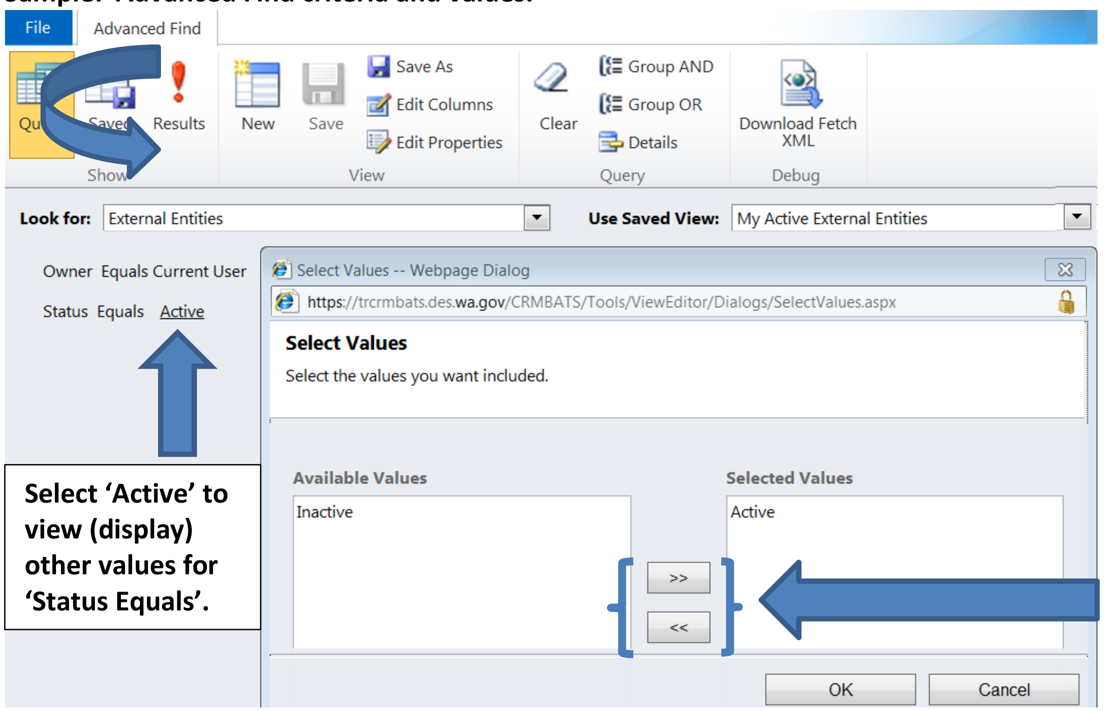
Advanced Find criteria and values may be changed depending on the results needed.

To use criteria and value fields in Avanced Find:

1. **Select:** Criteria to use for the search. Note: when the Advanced Find icon on the ribbon bar is selected, the current view for that page will be displayed by default.
2. **Select:** Results (from the ribbon bar).

☑**Result**: Values matching the advanced find criteria are displayed. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Advanced Find criteria and values.



Select 'Active' to view (display) other values for 'Status Equals'.

In this sample, the value 'Active' (next to 'Status Equals') was selected and the system opened Select Values – Webpage Dialog.

- **'Active' was selected and moved from available values to selected values by using the '>>' (add) button.**

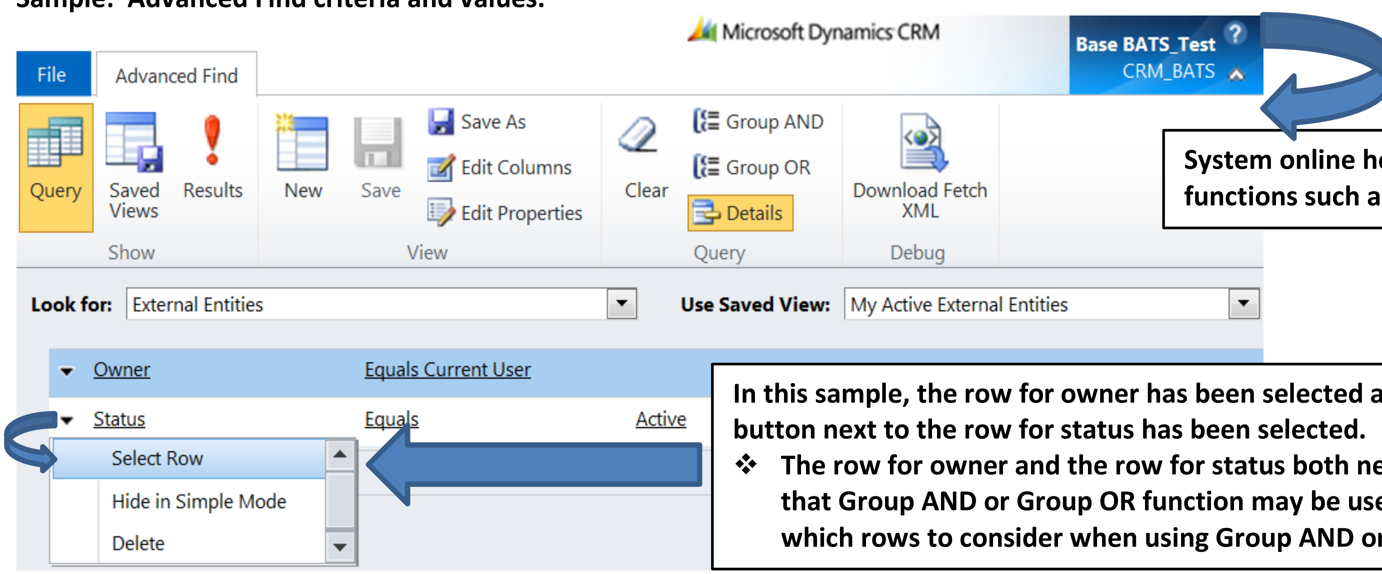
- **To move 'Active' from selected values to available values, use the '<<' (remove) button.**
- **To move 'Inactive' from available values to selected values, use the '>>' (add) button.**

Advanced Find (continued)

Additional criteria and values may be changed depending on the results needed.

Function	Description
Group AND	Group query lines together by using AND. ❖ Results will include only values that match all the grouped lines. For example, search (find) External Entities where the Owner Equals Current User AND Status Equals Active.
Group OR	Group query lines together by using OR. ❖ Results will include values that match any of the grouped lines. For example, search (find) External Entities where the Owner Equals Current User OR Status Equals Active.
Details	Display details of the current search (query) and/or to add more criteria.
Clear	Removes query parameters (criteria).

Sample: Advanced Find criteria and values.



System online help is useful for common functions such as Advanced Find.

In this sample, the row for owner has been selected and the dropdown button next to the row for status has been selected.

- ❖ **The row for owner and the row for status both need to be selected so that Group AND or Group OR function may be used. This tells the system which rows to consider when using Group AND or Group OR functions.**

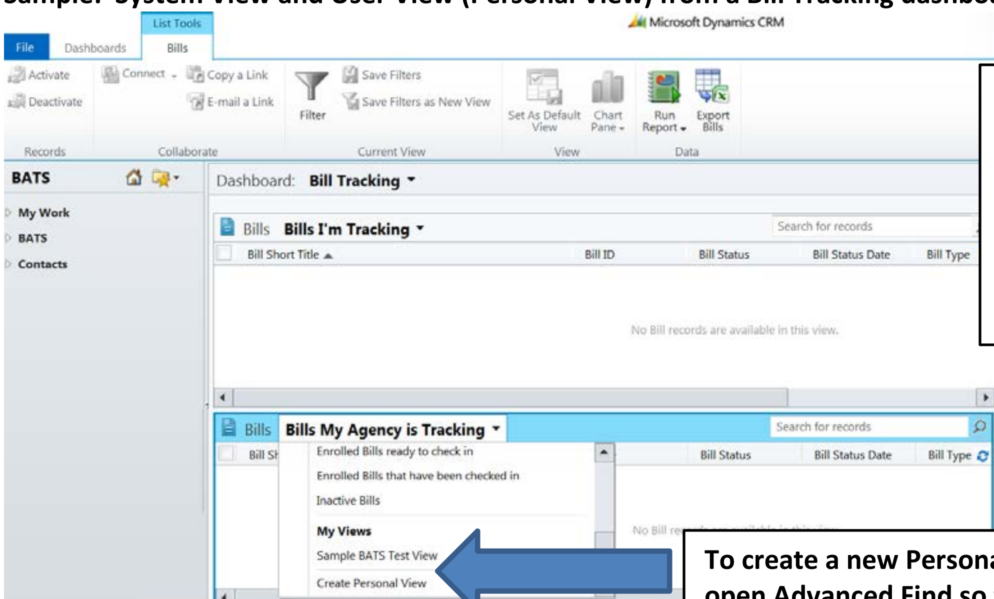
Views

Views display a list of values associated with a specific page.

- ❖ Available views on a page will change depending on which page is displayed.
- ❖ Multiple views may be included on a Dashboard page.

Type	Maintained by	Description
System View	DES Technical Support Staff	Available to all users.
User View (Personal View)	Agency	Initially owned by the user who created the view. ❖ May be shared with other users.

Sample: System View and User View (Personal View) from a Bill Tracking dashboard page.



In this sample, the 'Bill Tracking' dashboard includes two views:

- ❖ **Bills I'm Tracking is a System View.**
- ❖ **Bills My Agency is Tracking is a System View. In this sample, the dropdown is selected to display additional views that may be selected, including 'Sample BATS Test View' which is a Personal View.**

To create a new Personal View, select 'Create Personal View' and the system will open Advanced Find so that a new personal view may be created.

Select View From Dropdown List

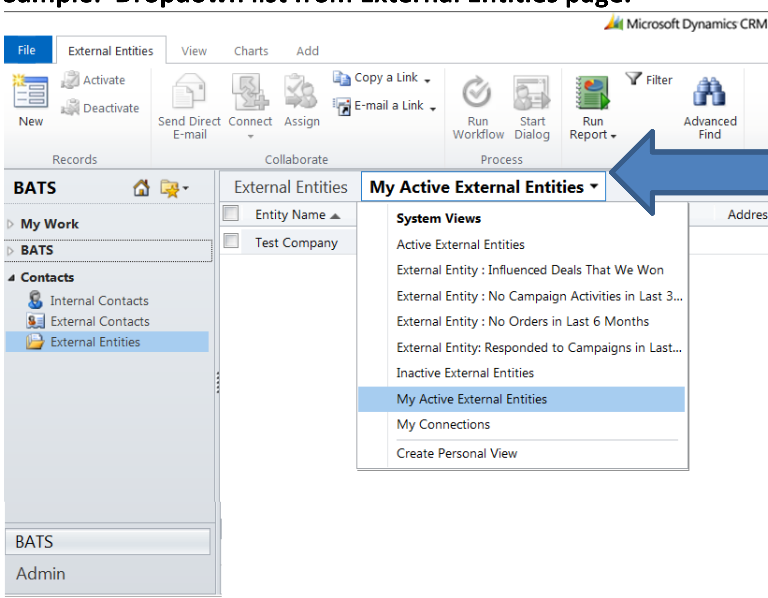
The list of views available on a page may be selected from a dropdown list. Types of views available in a dropdown list will change depending on which BATS page is displayed.

To select a view:

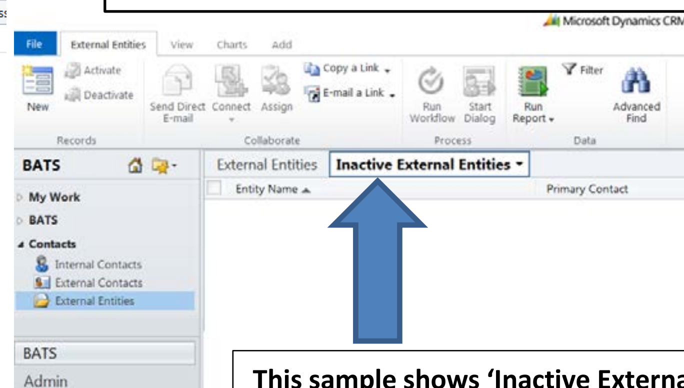
1. **Select:** Dropdown list.
2. **Select:** Name of view (from dropdown list).

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

Sample: Dropdown list from External Entities page.



This sample shows dropdown list from External Entities 'My Active External Entities' view.



This sample shows 'Inactive External Entities' view.

Saved Views

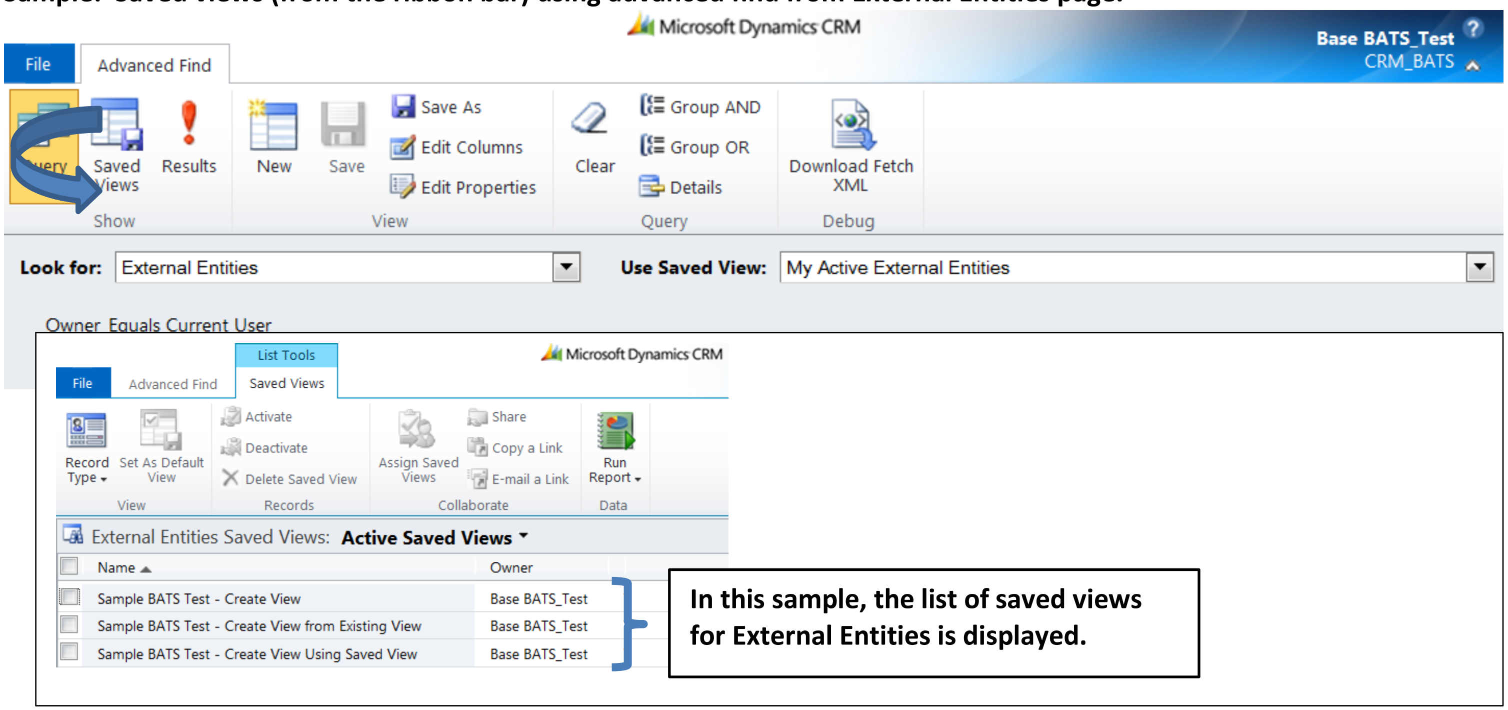
The list of views that have been previously saved is available from Advanced Find.

To use Advanced Find to search for saved views:

1. **Select:** Advanced Find (from the ribbon bar).
2. **Select:** Saved Views (from the ribbon bar).

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

Sample: Saved views (from the ribbon bar) using advanced find from External Entities page.



Share Personal Views

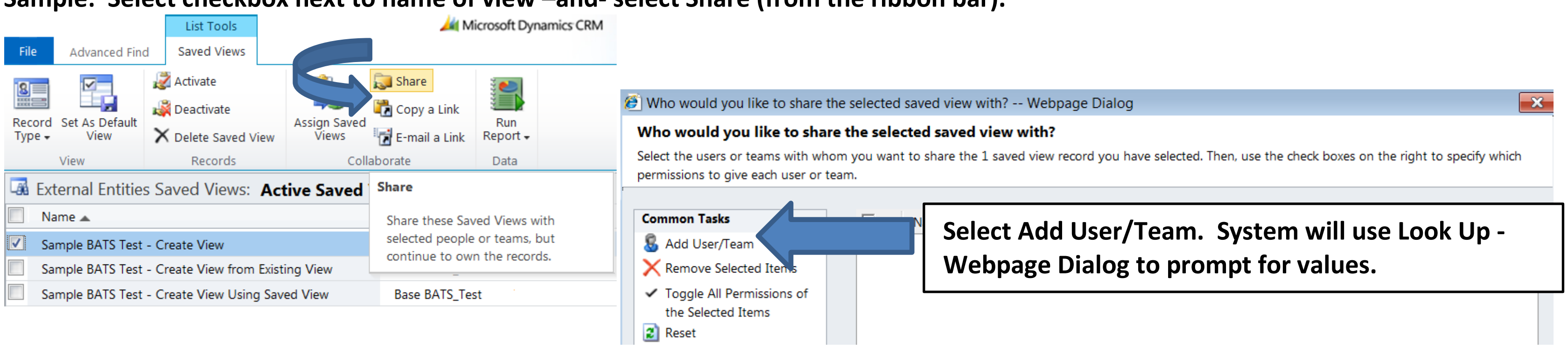
Personal views (saved views) may be shared with other users.

To share a personal view (shared view) with another user:

1. **Select:** Advanced Find (from the ribbon bar).
2. **Select:** Saved Views (from the ribbon bar).
3. **Select:** Checkbox (next to name of view).
4. **Select:** Share (from the ribbon bar).
5. **Select:** Add User/Team. Use Look Up to search for user or team.
6. **Select:** Values provided from Webpage – Dialog. The system will prompt for values using Look Up.
7. **Select:** OK (from Webpage Dialog).

☑**Result**: View is shared but ownership is retained. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Select checkbox next to name of view –and- select Share (from the ribbon bar).



Create Personal View from 'Scratch'

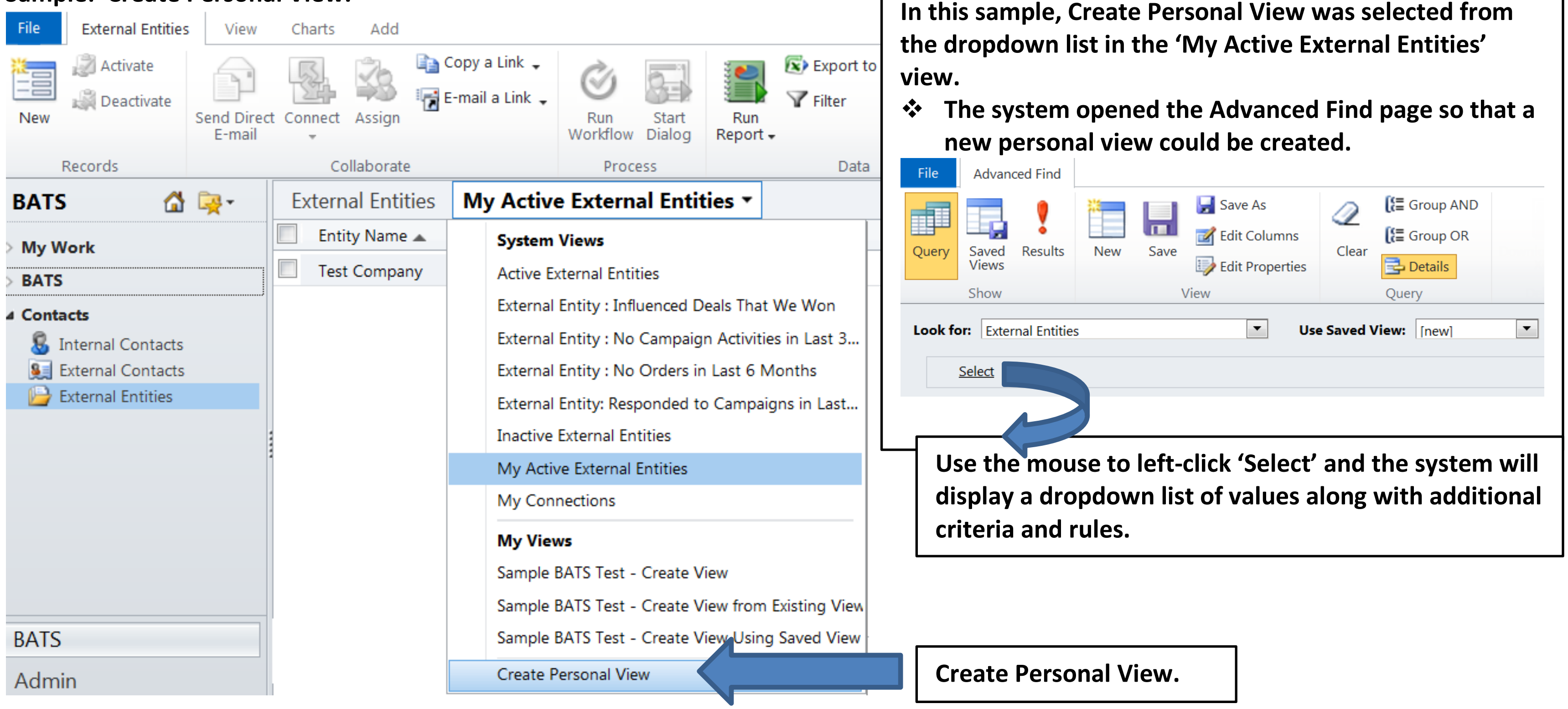
A personal view may be created from 'scratch' or from another existing (saved) view.

To create a personal view from 'scratch':

1. **Select:** Create Personal View (from dropdown list in a view).

☑**Result**: System will open the Advanced Find page so that a new personal view may be created. 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 create a new personal view from 'scratch'.

Sample: Create Personal View.



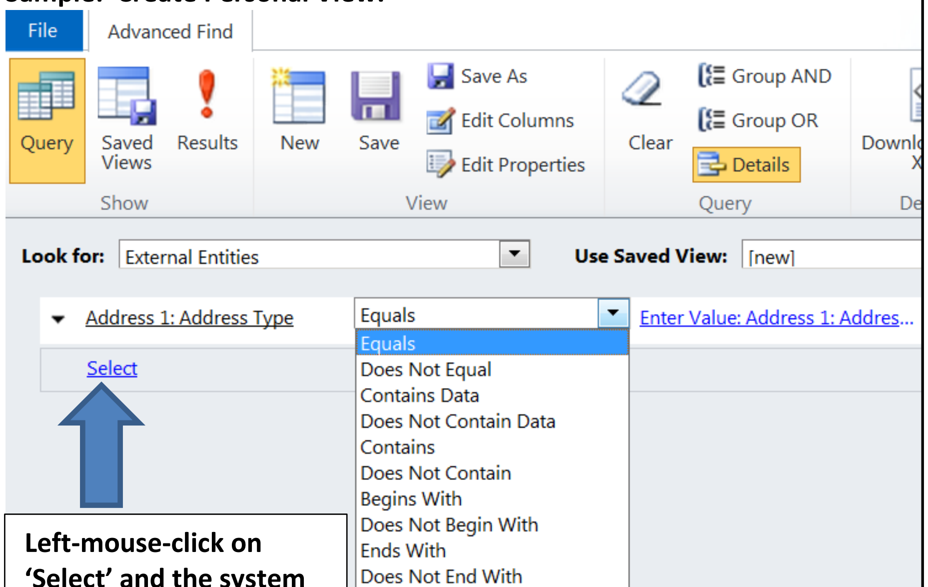
Create Personal View from 'Scratch' (continued)

To continue creating a personal view 'from scratch':

1. **Select**: Select (use the mouse to left-click on Select and a dropdown list will be displayed).
2. **Select**: Fields (from the dropdown lists). Note: When a field is selected, the system will prompt for more values.
3. **Select**: Save (from the ribbon bar).
4. **Input**: Name for new view.
5. **Select**: OK (from Query Properties – Webpage Dialog).

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

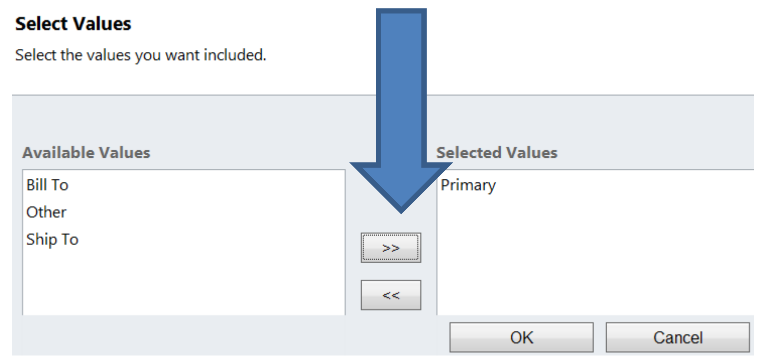
Sample: Create Personal View.



Left-mouse-click on 'Select' and the system will display a dropdown list with values.

In this sample, 'Address 1:Address Type' was selected and 'Equals' was selected.

- **Select 'Enter Value:Address 1:Address Type' and the system will display values associated with that criteria.**
- **Select an available value and the '>>' (add) or '<<' (remove) button as needed. In this sample, the value for Primary was selected with the '>>' (add) button.**



Create Personal View from an Existing (Saved) View

To create a personal view from an existing (saved) view:

1. **Select:** Create Personal View (from dropdown list in a view).
2. **Select:** Saved View (use the dropdown list next to Use Saved View to select an existing view). Note: the fields and criteria from the saved view will be displayed.
3. **Select**: Field criteria and/or value.

If new view will use	Then do this	Additional information
Different values (different values than shown in the existing view criteria/values)	1. **Select:** Field criteria and/or value. 2. **Change:** Field criteria and/or value (from dropdown list and Webpage Dialog).	When the field criteria and/or value is selected, a dropdown list will be displayed so that the values may be changed for the new view. ❖ When a field is selected, the system will prompt for more values. ❖ When a row is selected, the system will prompt for more values, including a 'delete row' option.
Additional values (more values than shown in the existing view criteria/values)	1. **Select:** Select (use the mouse to left-click on Select and a dropdown list will be displayed). **2. Select:** Field criteria and/or value (from dropdown list and Webpage Dialog).	When the field criteria and/or value is selected, a dropdown list will be displayed so that the values may be added for the new view. ❖ When a field is selected, the system will prompt for more values.

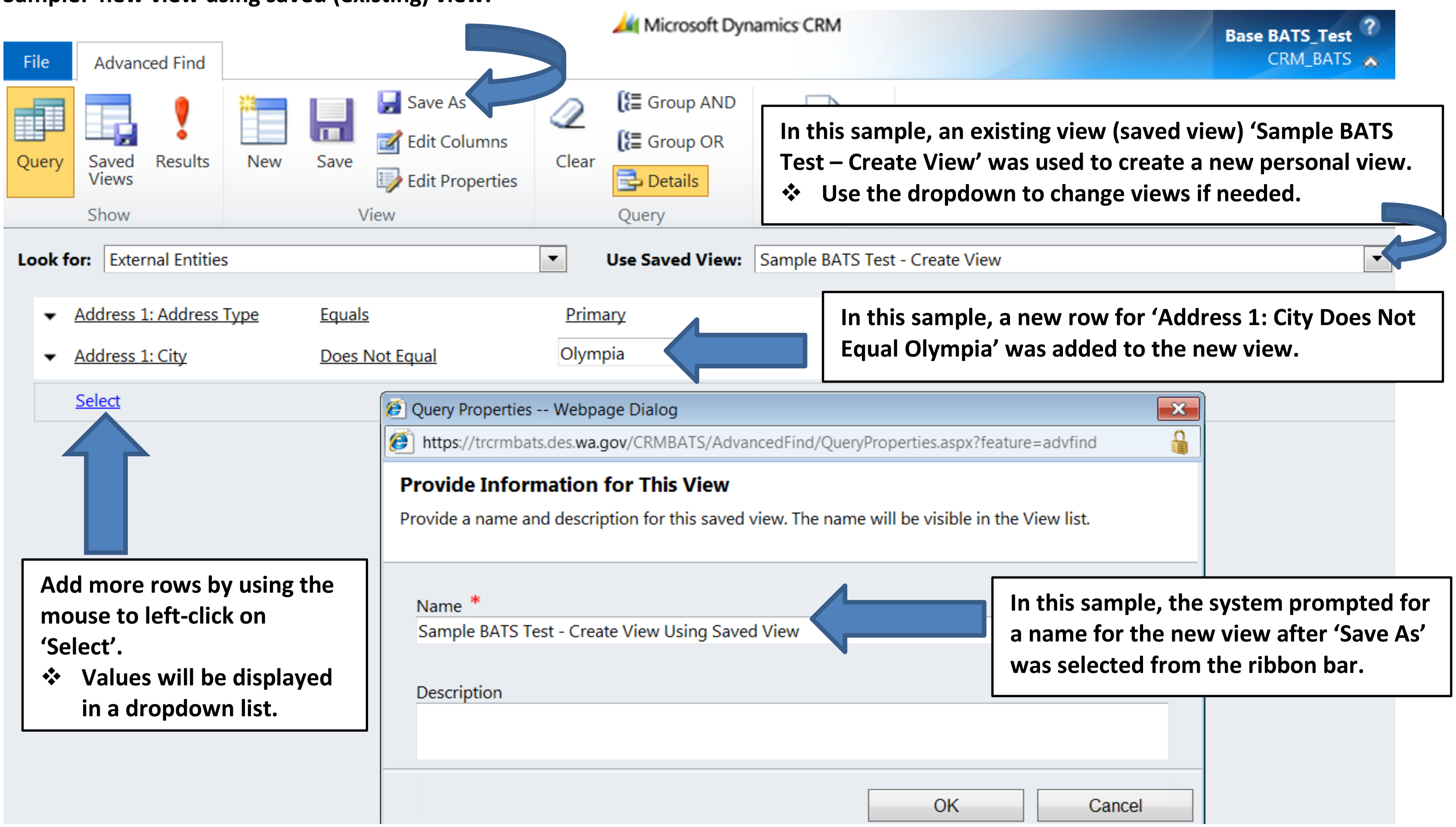
4. **Select**: Save As (from the ribbon bar).
5. **Input**: Name for new view.
6. **Select**: OK (from Query Properties – Webpage Dialog).

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

Create Personal View from an Existing (Saved) View (continued)

A personal view may be created from another existing (saved) view.

Sample: new view using saved (existing) view.



In this sample, an existing view (saved view) 'Sample BATS Test – Create View' was used to create a new personal view.

- ❖ **Use the dropdown to change views if needed.**

In this sample, a new row for 'Address 1: City Does Not Equal Olympia' was added to the new view.

Add more rows by using the mouse to left-click on 'Select'.

- ❖ **Values will be displayed in a dropdown list.**

In this sample, the system prompted for a name for the new view after 'Save As' was selected from the ribbon bar.

Edit (Update) Columns on a Personal View
Columns on a personal view may edited (updated).

To edit (update) columns on a personal view:

1. **Select:** Personal View (from dropdown list in a view).
2. **Select:** Advanced Find (from the ribbon bar). The system will open Advanced Find to display criteria and/or values based on the view selected.
3. **Select**: Edit Columns (from the ribbon bar). The system will open Edit Columns – Webpage Dialog.
4. **Select**: Values to be changed in Edit Columns – Webpage Dialog.
5. **Select**: OK (in Webpage Dialog).

☑**Result**: View is saved with column edits (updates). An error message will be displayed if the action is not allowed due to security permissions or system validation error

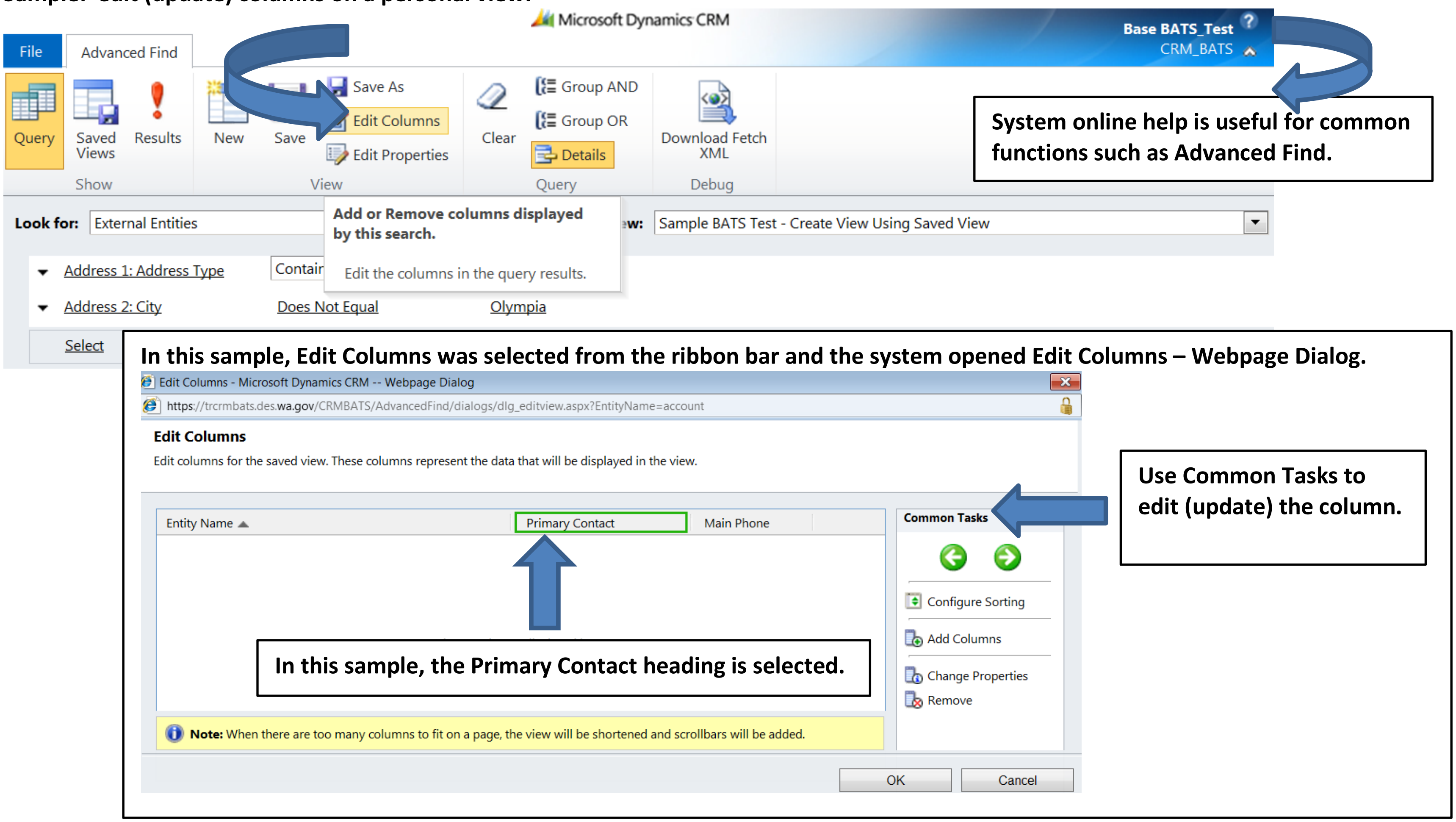
If column needs to be	Then do this (from the Edit Columns – Webpage Dialog)
Moved (left to right or right to left)	1. **Select**: Column Heading. 2. **Select**: Arrow (left arrow or right arrow).
Sorted (different order)	1. **Select**: Configure Sorting. The system will open Sort Order – Webpage Dialog. 2. **Select**: Columns to sort by. Use the dropdown to change columns if needed. 3. **Select**: Ascending Order or Descending Order.
Added	1. **Select**: Add Columns. The system will open Add Columns – Webpage Dialog. 2. **Select**: Checkbox next to column to be added. Use the dropdown to change record type if needed
Adjusted for width	1. **Select**: Column Heading. 2. **Select**: Change Properties. The system will open Change Columns – Webpage Dialog. 3. **Select**: Radio button next to width for the column.
Removed	1. **Select**: Column Heading. 2. **Select**: Remove.

.

Edit (Update) Columns on a Personal View (continued)

Columns on a personal view may be edited (updated).

Sample: edit (update) columns on a personal view.



Edit (Update) Personal View Properties

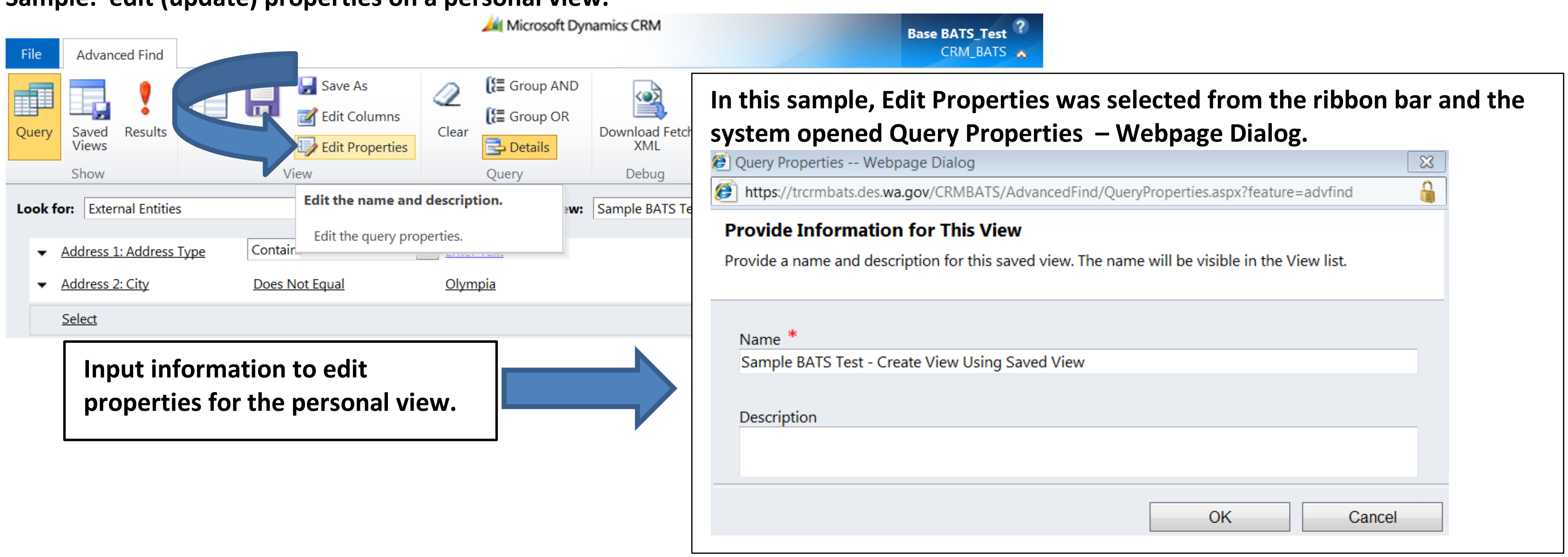
Properties on a personal view may edited (updated).

To edit (update) properties on a personal view:

1. **Select:** Personal View (from dropdown list in a view).
2. **Select:** Advanced Find (from the ribbon bar). The system will open Advanced Find to display criteria and/or values based on the view selected.
3. **Select**: Edit Properties (from the ribbon bar). The system will open Query Properties – Webpage Dialog.
4. **Input**: Information to edit properties for the personal view.
5. **Select**: OK (in Query Properties – Webpage Dialog).
6. **Select**: Save.

☑**Result**: View is saved with property edits (updates). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: edit (update) properties on a personal view.



The Bill Analysis and Tracking System (BATS) supports Single Sign-On (SSO) using a state network userid and password.

- An internet browser is required to LogOn to BATS. Internet Explorer version 7 or above is recommended. Note: other browsers are not currently supported.
- A standard Consolidated Technology Services (CTS) "Sign In" page is used to access BATS (https://crm.des.wa.gov). The CTS page will prompt new users to select a method of access using Enterprise Active Directory (EAD) or Secure Access Washington (SAW).
- Password resets are processed with the state network userid (outside of BATS) so there isn't a 'change password' function within BATS.

This document will provide an overview for:

- LogOn inside the State Government Network (SGN) using Enterprise Active Directory (EAD).
- LogOn outside the State Government Network (SGN) using Secure Access Washington (SAW).
- LogOff.

For additional technical information about	Reference
State Government Network (SGN)	http://cts.wa.gov/products/networks/GovernmentNetworks.aspx ❖ Information about the SGN managed and supported by Consolidated Technology Services (CTS).
Secure Access Washington (SAW)	http://support.secureaccess.wa.gov/ ❖ Information and Frequently Asked Questions (FAQs) about Secure Access Washington (SAW) managed and supported by Consolidated Technology Services (CTS). This includes process steps for creating a new SAW account and using an existing SAW account.
Single Sign On (SSO) and Enterprise Active Directory (EAD)	http://cts.wa.gov/products/networks/activeDirectory.aspx ❖ Information about SSO/EAD managed and supported by Consolidated Technology Services (CTS).

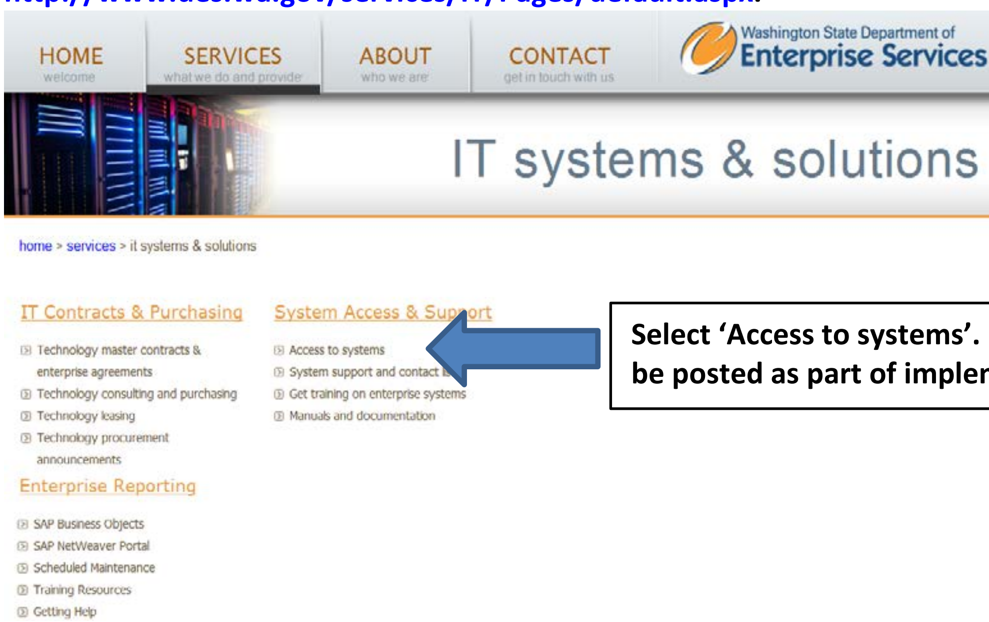
The link to access BATS is located on the DES website (www.des.wa.gov).

To access the link to BATS from the DES website:

1. **Open**: Browser (Internet Explorer version 7 or above).
2. **Input**: DES website URL for 'IT systems & solutions / Access to Systems' in the address line of the web browser (**http://www.des.wa.gov/services/IT/Pages/default.aspx**).
3. **Press**: Enter. The 'IT systems & solutions' page on the DES website will be displayed.
4. **Select**: Access to systems.
5. **Scroll:** To find the link to BATS (under 'Access from within the State Intranet' or 'Access from outside the State Intranet').
6. **Select:** Bill Analysis and Tracking System (BATS).

☑**Result**: The Bill Analysis Tracking System (BATS) information page is displayed (this page will have the URL to access BATS).

Sample: DES website under Services ('what we do and provide') / IT Systems & Solutions / System Access & Support page
http://www.des.wa.gov/services/IT/Pages/default.aspx.



Select 'Access to systems'. The link to access BATS will be posted as part of implementation activities.

LogOn to BATS inside the State Government Network (SGN) using Enterprise Active Directory (EAD)

A standard Consolidated Technology Services (CTS) "Sign In" page is used to access BATS. The CTS page will prompt new users to select a method of access using Enterprise Active Directory (EAD) or Secure Access Washington (SAW).

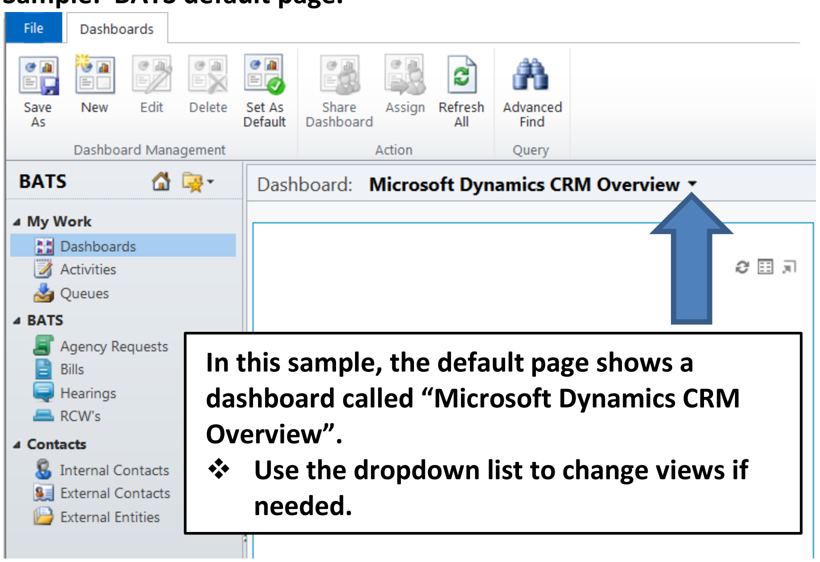
- ❖ BATS supports Single Sign-On (SSO) using a state network userid and password. After a new user has established their method of access, they may not be prompted again for credentials.

To LogOn to BATS inside SGN:

1. **Open**: Browser (Internet Explorer version 7 or above).
2. **Input**: BATS URL in the address line of the web browser (https://crm.des.wa.gov).
3. **Press**: Enter. Note: if the CTS "Sign In" page is displayed, select a method of access from the dropdown list.

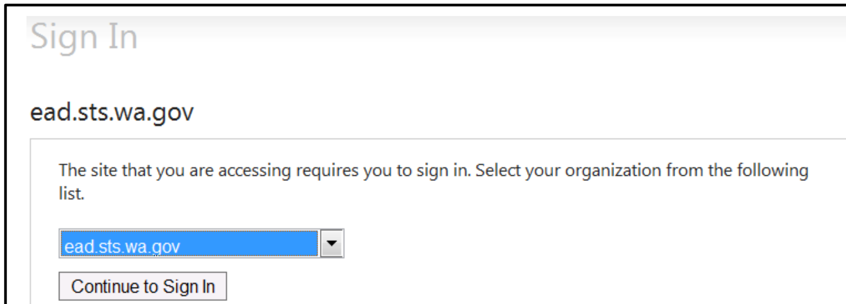
☑**Result**: The BATS default page is displayed. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: BATS default page.



In this sample, the default page shows a dashboard called "Microsoft Dynamics CRM Overview".

- ❖ **Use the dropdown list to change views if needed.**



In this sample, the CTS Sign In page prompts for a method of access.

- ❖ **Select**: 'ead.sts.wa.gov' to access BATS using Enterprise Active Directory (EAD). This is used inside the State Government Network (SGN). Note: The CTS Sign In page includes "Select your organization from the following list", however, organizations are not listed in the dropdown list.
- ❖ **Select**: Continue to Sign In.

LogOn to BATS outside the State Government Network (SGN) using Secure Access Washington (SAW)

A standard Consolidated Technology Services (CTS) “Sign In” page is used to access BATS. The CTS page will prompt new users to select a method of access using Enterprise Active Directory (EAD) or Secure Access Washington (SAW).

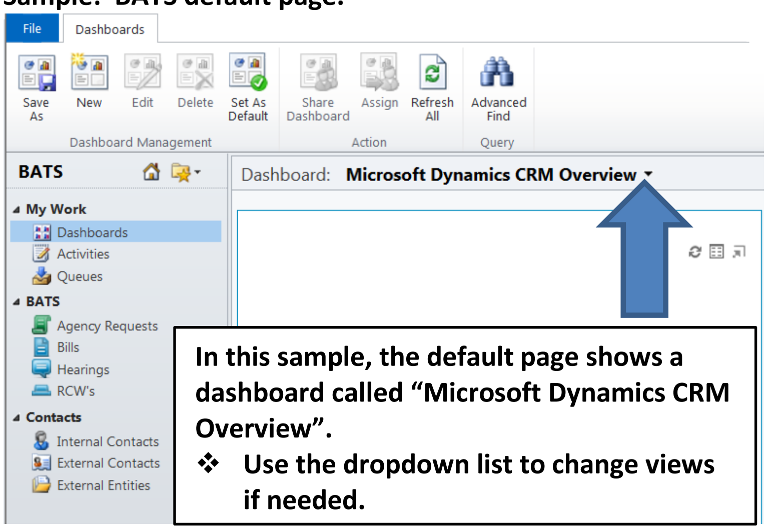
- ❖ BATS supports Single Sign-On (SSO) using a state network userid and password. After a new user has established their method of access, they may not be prompted again for credentials.

To LogOn to BATS outside SGN:

1. **Open**: Browser (Internet Explorer version 7 or above).
2. **Input**: BATS URL in the address line of the web browser (https://crm.des.wa.gov).
3. **Press**: Enter. Note: if the CTS “Sign In” page is displayed, select a method of access from the dropdown list.

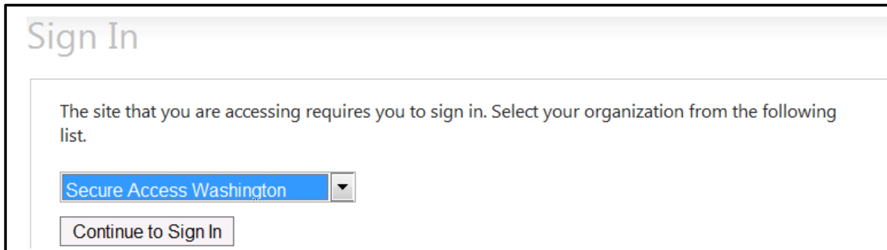
☑**Result**: LogOn instructions to access systems outside the State Government Network (SGN) using Secure Access Washington (SAW) will be provided. Follow those instructions and then the BATS default page is displayed. An error message will be displayed if the action is not allowed due to security permissions or system validation error. Note: For additional information about SAW, please reference http://support.secureaccess.wa.gov/.

Sample: BATS default page.



In this sample, the default page shows a dashboard called “Microsoft Dynamics CRM Overview”.

- ❖ **Use the dropdown list to change views if needed.**



In this sample, the CTS Sign In page prompts for a method of access.

- ❖ **Select**: ‘Secure Access Washington’ to access BATS using Secure Access Washington (SAW). This is used outside the State Government Network (SGN). Note: The CTS Sign In page includes “Select your organization from the following list”, however, organizations are not listed in the dropdown list.
- ❖ **Select**: Continue to Sign In.

LogOff from BATS

BATS does not have a separate LogOff procedure.

To LogOff from BATS using the browser 'close' function:

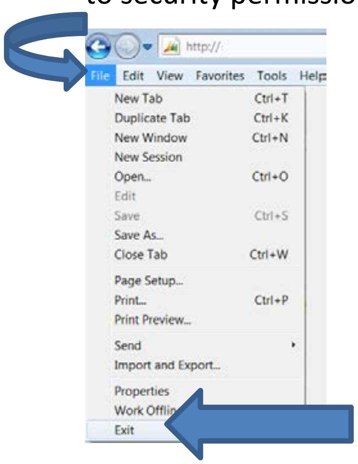
1. **Select:** ✕ (from the browser top right corner – this is the 'close' function on the browser).

☑**Result**: The browser is closed (and the BATS window is closed). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

To LogOff from BATS using the browser menu bar:

1. **Select:** File (from the browser menu bar on top left side).
2. **Select:** Exit (from the File dropdown list).

☑**Result**: The browser is closed (and the BATS window is closed). An error message will be displayed if the action is not allowed due to security permissions or system validation error.



The Bill Analysis and Tracking System (BATS) provides flexible options for managing tasks and assignments for bill-related information. These options use standard Microsoft functions such as Activities to assign and manage actions (tasks or assignments).

Type	Description
Activities Page	Views from the Activities page may be used to display lists of items. ❖ For example, 'My Open Activities' or 'My Closed Activities' are system views that may be available from a dashboard and/or from the Activities page on the left-side navigation pane.
Tasks and Activities	Tasks and activities may be used to create or manage actions such as e-mails, phone calls, letters, faxes, and appointments. ❖ May be created or managed from the ribbon by navigating to the Activities page on the left-side navigation pane. ❖ May be updated by opening an existing activity.

This document provides an overview of Activities, including:

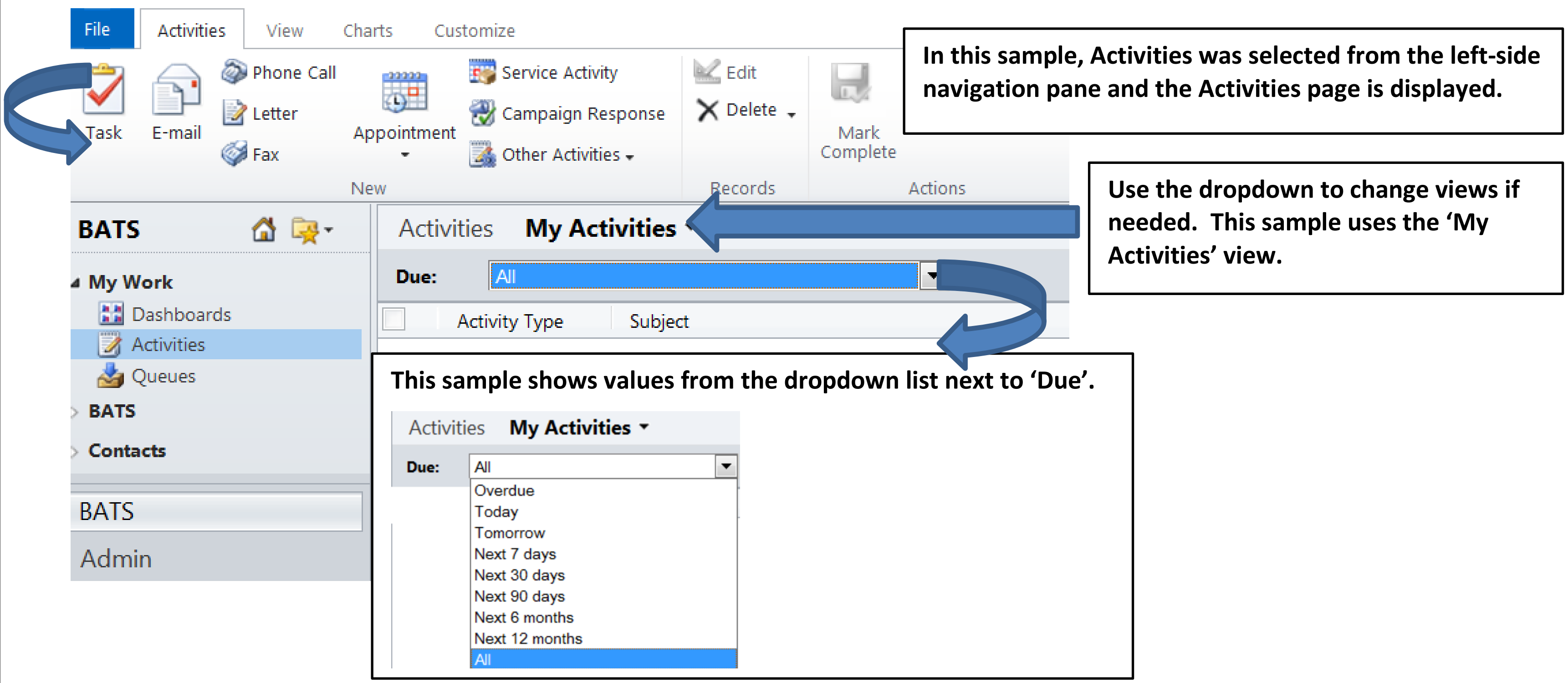
- ❖ Activities page.
- ❖ Add new activity.
- ❖ Update existing activity.
- ❖ Use 'mark complete' for an activity.

Activities Page

Activities may be used to create or manage actions (tasks or assignments) such as e-mails, phone calls, letters, faxes, and appointments.

- Views from the Activities page may be used to display lists of items associated with an activity.
- Activities may be assigned from the ribbon by navigating to the Activities page on the left-side navigation pane.

Sample: Activities page.



Add New Activity

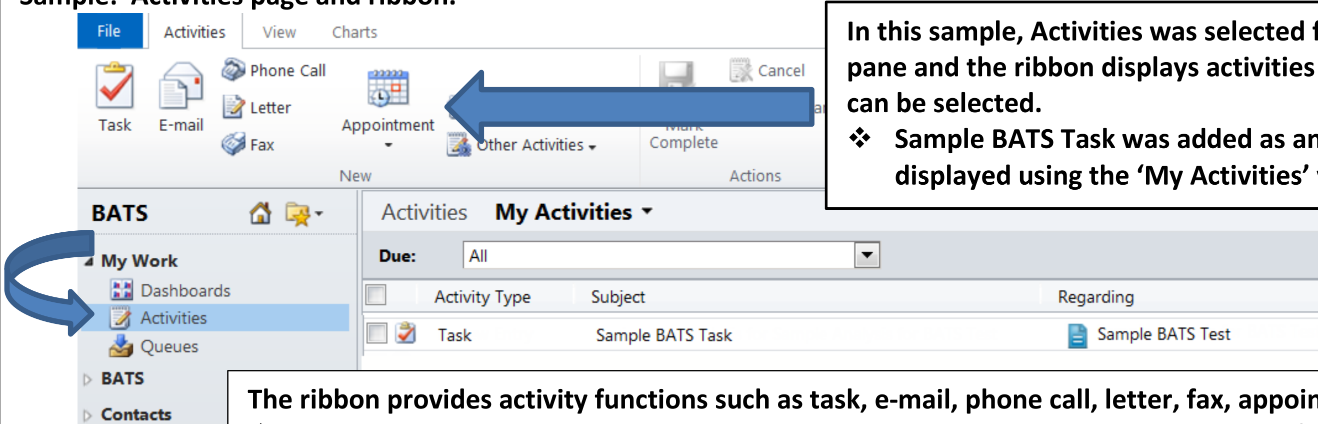
The activities function is available from the Activities page on the left-side navigation pane.

To add a new Activity from the BATS tab (left-side navigation pane):

1. **Select:** My Work (left-side navigation pane).
2. **Select:** Activities (left-side navigation pane).
3. **Select:** Task or activity (from ribbon). The system will open a new page (window) so that information about the activity may be input.
4. **Input:** Information about the activity.
5. **Select:** Save.

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

Sample: Activities page and ribbon.



In this sample, Activities was selected from the left-side navigation pane and the ribbon displays activities (tasks and assignments) that can be selected.

- **Sample BATS Task was added as an activity (task) and is displayed using the 'My Activities' view on the Activities page.**

The ribbon provides activity functions such as task, e-mail, phone call, letter, fax, appointment.

- **When one of these activity functions is selected, the system will open a new page (window) so that information about the activity may be input.**
- **If E-mail is selected, an option to 'send' the email is also provided.**

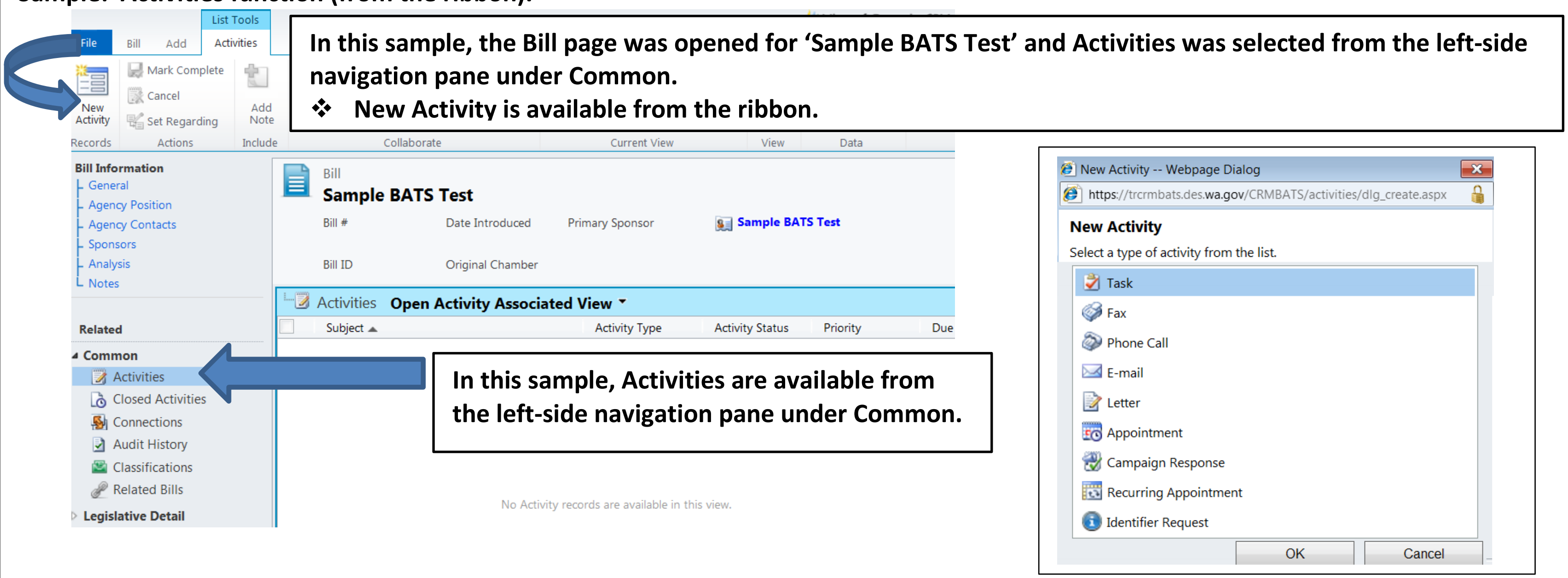
Add New Activity (continued)

To add an Activity from a specific BATS page such as bills, hearings, external contacts, and external entities:

1. **Select:** Name/Title of bill, hearing, external contact, or external entity. The system will open the page associated with that item or contact.
2. **Select:** Activity (from left-side navigation pane).
3. **Select:** New Activity (from ribbon).
4. **Select:** Activity type associated with task or assignment. The system will open a New Activity – Webpage Dialog.
5. **Input:** Information about the activity.
6. **Select:** Save.

☑**Result**: The activity is saved and associated with the item or contact. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Activities function (from the ribbon).



Update Existing Activity

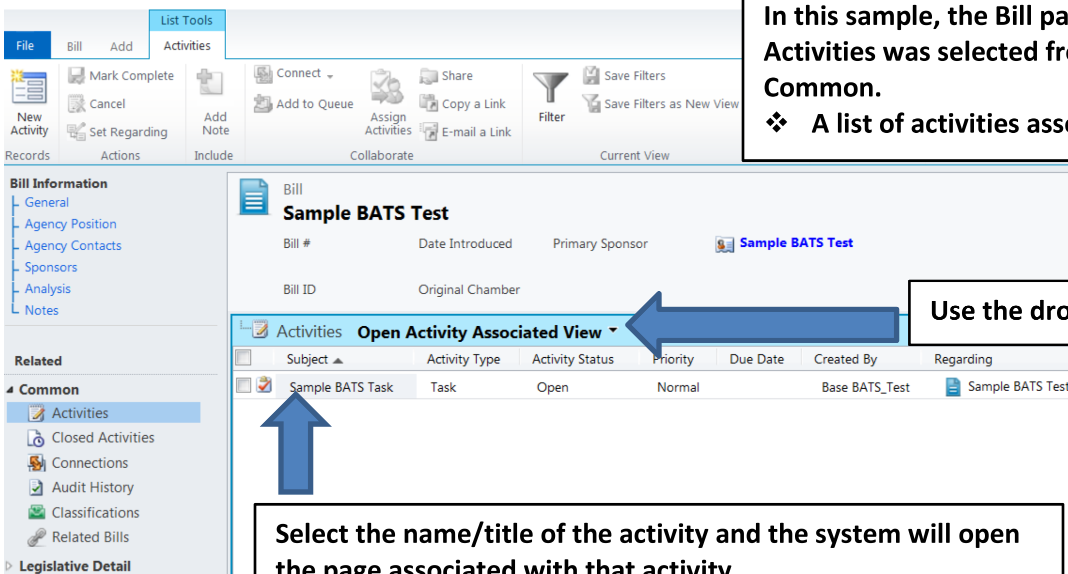
A list of existing activities is available from views on the Activities page on the left-side navigation pane.

To update an existing activity:

1. **Select:** Name/Title of the activity. The system will open the page associated with that activity.
2. **Input:** Information about the activity.
3. **Select:** Save.

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

Sample: Select the name/title of the activity.



In this sample, the Bill page was opened for 'Sample BATS Test' and Activities was selected from the left-side navigation pane under Common.

❖ **A list of activities associated with the bill is displayed.**

Use the dropdown to change views if needed.

Select the name/title of the activity and the system will open the page associated with that activity.

Use 'Mark Complete' for an Activity

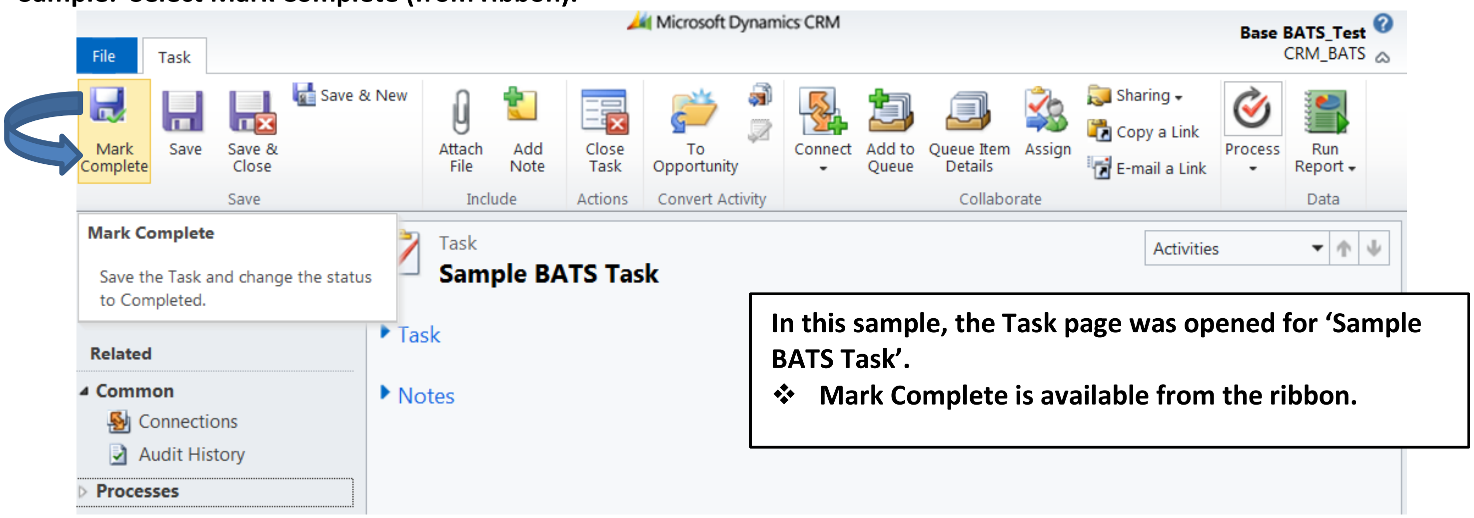
The 'Mark Complete' function may be used to update the status of an activity to indicate that it is complete.

To update an activity to indicate that it is complete ('mark complete'):

1. **Select:** Name/Title of the activity. The system will open the page associated with that activity.
2. **Input:** Information and/or notes if needed.
3. **Select:** Mark Complete (from the ribbon).

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

Sample: Select Mark Complete (from ribbon).



The Bill Analysis and Tracking System (BATS) provides flexible options for creating tasks and assignments for bill-related information. These options use standard Microsoft functions such as Queues to create and manage actions (tasks or assignments).

Type	Description
Queues Page	Views from the Queues page may be used to display lists of items. ❖ For example, 'All Items' or 'Items available to work on' are system views that may be available from a dashboard and/or from the Queues page on the left-side navigation pane.
Queues	Queues may be used to create or manage actions (tasks or assignments) such as an agency analysis or review. ❖ May be assigned from the ribbon when available from some of the BATS pages (for example, analysis page or review task details). ❖ Some queue items may be assigned from the system (for example, when the first reviewer marks their task compete, then the system will automatically update the review queue for the second reviewer).

This document provides an overview of Queues, including:

- Queues page.
- Add new item to a queue.
- Update existing item in a queue.
- Use 'mark complete' for an item in a queue.

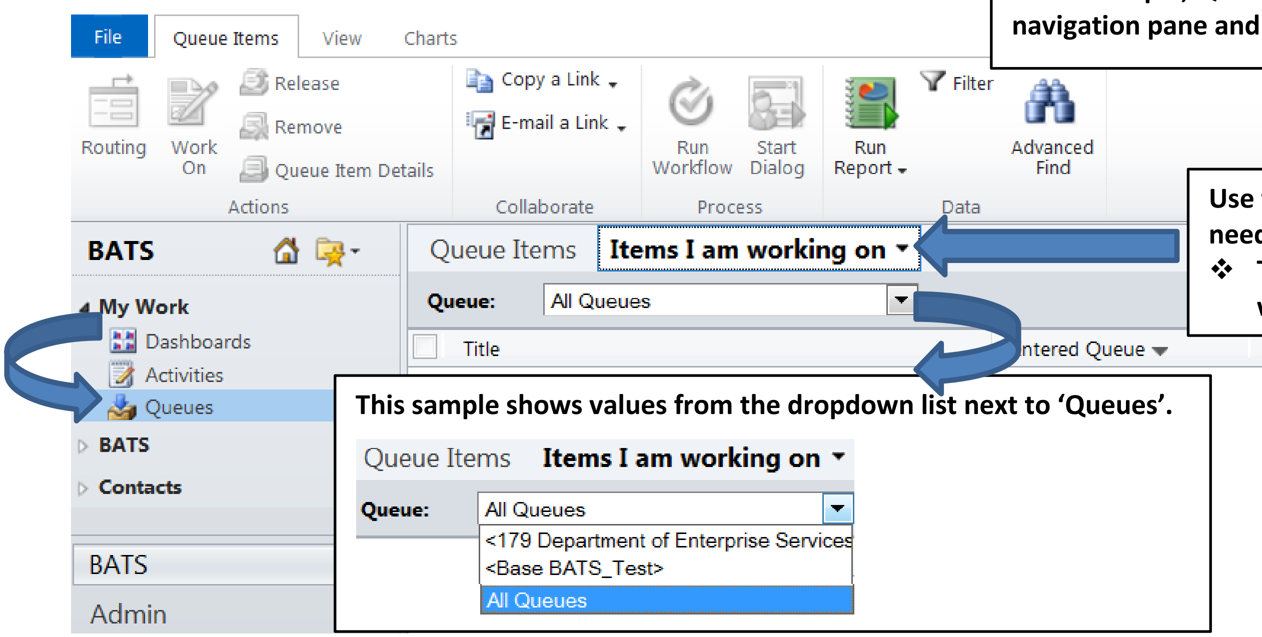
Queues Page

Queues may be used to create or manage actions (tasks or assignments) such as an agency analysis or review.

- Views from the Queues page may be used to display lists of items. For example, ‘All Items’ or ‘Items available to work on’ are system views that may be available from a dashboard and/or from the Queues page on the left-side navigation pane (under BATS/My Work/Queues).
- Queues may be assigned from the ribbon when available from some of the BATS pages (such as an agency analysis page).

Sample: Queues page.

In this sample, Queues was selected from the left-side navigation pane and the Queues page is displayed.



Use the dropdown to change views if needed.

- **This sample uses the ‘Items I am working on’ view.**

This sample shows values from the dropdown list next to ‘Queues’.

Add New Item to a Queue

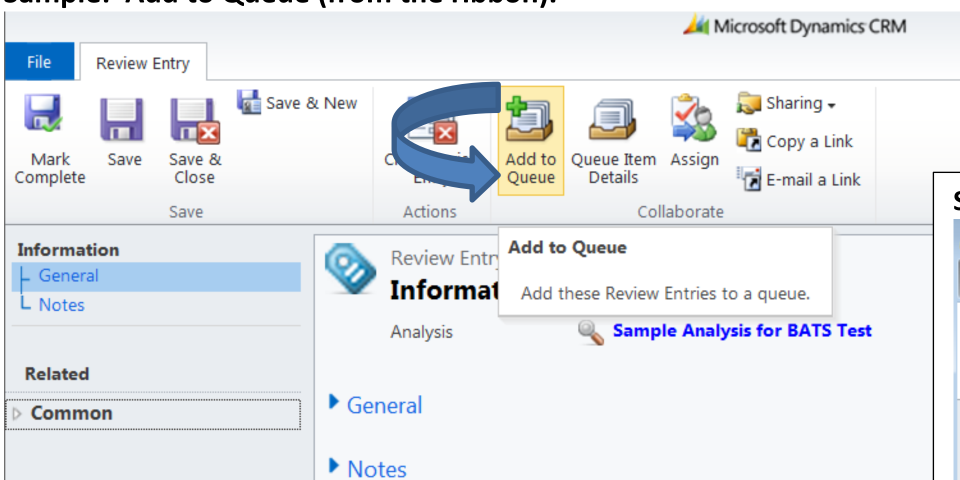
Queues may be assigned from the ribbon when available from some of the BATS pages (such as an agency analysis page in the review task details section).

To add a new item to a queue from a BATS page:

1. **Select:** Add to Queue (from ribbon). The system will display Add to Queue - Webpage Dialog.
2. **Select:** Look Up (from the Add to Queue – Webpage Dialog).
3. **Select:** Checkbox next to name of queue (use Look Up from the Add to Queue – Webpage Dialog).
4. **Select:** Ok (in the Webpage Dialog box).
5. **Select:** Save.

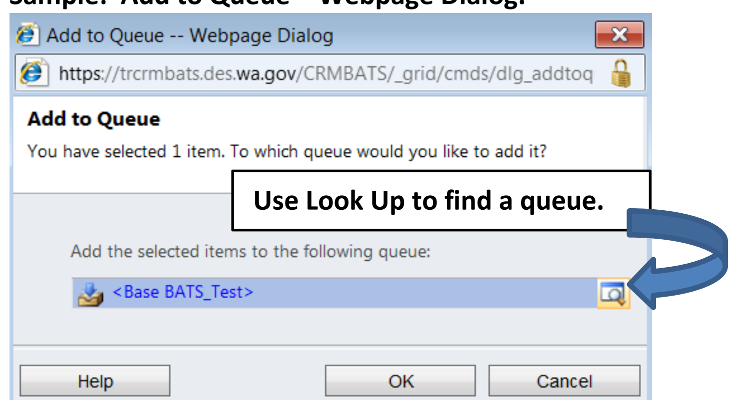
☑**Result**: Item (assignment or task) is saved to the Queue. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Add to Queue (from the ribbon).



In this sample, the Review Task Details section was opened on the Agency Analysis page and 'Add to Queue' was selected from the ribbon.

Sample: Add to Queue – Webpage Dialog.



Use Look Up to find a queue.

Update Existing Item in a Queue

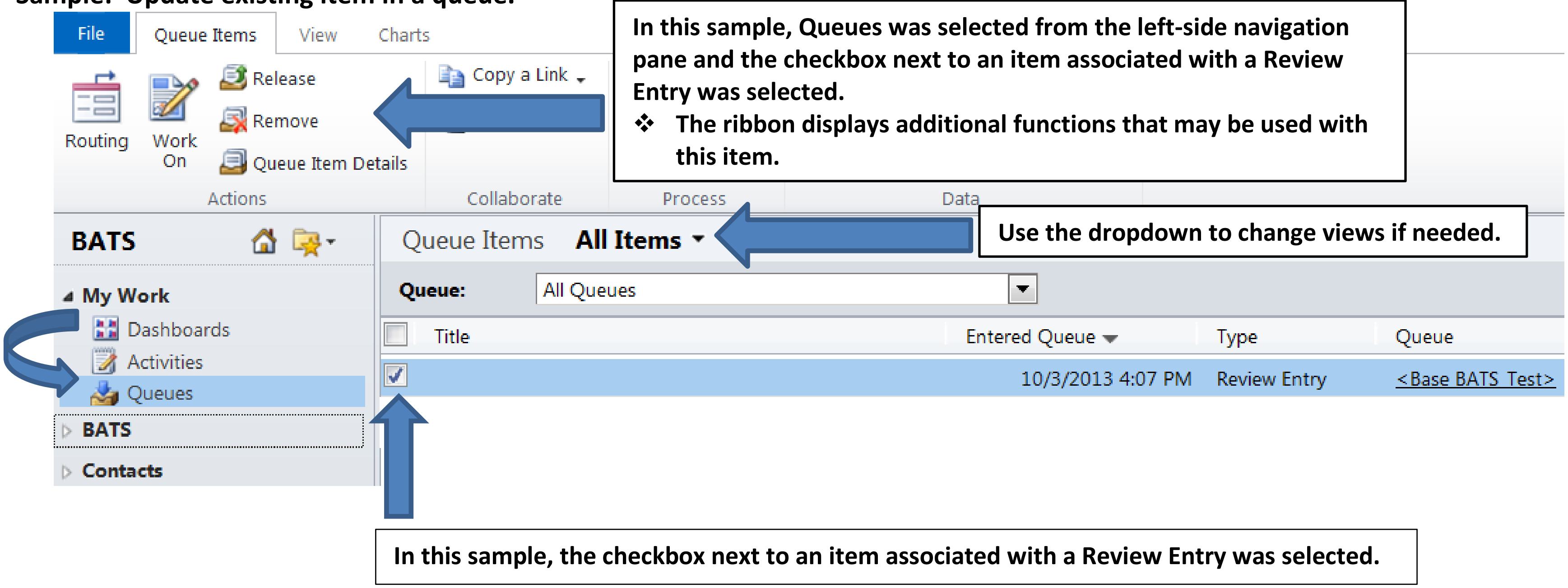
A list of existing items (tasks or assignments) is available from views on the Queues page on the left-side navigation pane under My Work.

To update an item in a Queue:

1. **Select:** Checkbox next to name/title of the item (task or assignment).
2. **Select:** Queue-related action (from the ribbon).
3. **Input:** Information about the action. Note: the information required will depend on which action was selected from the ribbon.

☑**Result**: Item (assignment or task) is updated. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Update existing item in a queue.



Use 'Mark Complete' for an Item in Queue

The 'Mark Complete' function may be used to update the status of an item to indicate that it is complete.

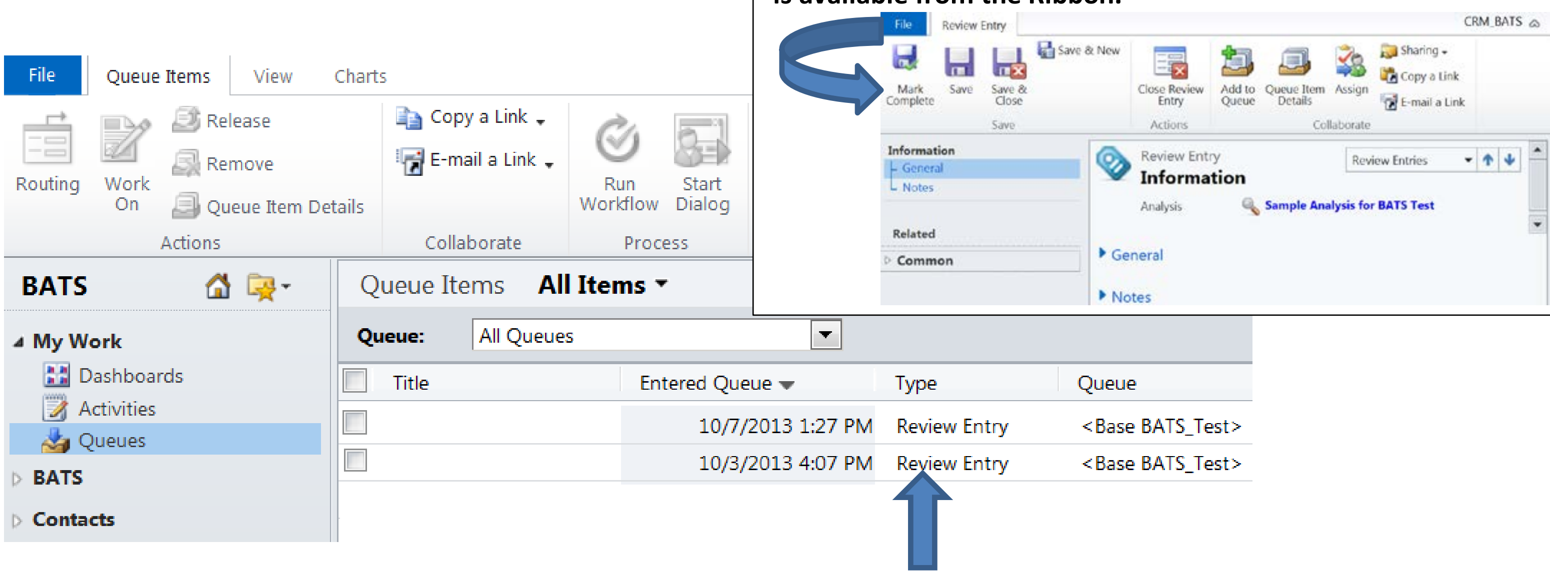
To update an item to indicate that it is complete ('mark complete'):

1. **Select:** Item in the queue (use the mouse to double-left-click on the item under Type and the system will open the page associated with that item).
2. **Input:** Information and/or notes if needed.
3. **Select:** Mark Complete (from the ribbon).

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

Sample: Select Mark Complete (from ribbon).

In this sample, the Review Entry page was opened and 'Mark Complete' is available from the Ribbon.



Use the mouse to double-left-click the item under Type (the system will open the page associated with that item).

The Bill Analysis and Tracking System (BATS) provides flexible options for creating tasks and assignments for bill-related information. These options use standard Microsoft functions such as Queues to create and manage actions (tasks or assignments).

Type	Description
Queues Page	Views from the Queues page may be used to display lists of items. ❖ For example, 'All Items' or 'Items available to work on' are system views that may be available from a dashboard and/or from the Queues page on the left-side navigation pane.
Queues	Queues may be used to create or manage actions (tasks or assignments) such as an agency analysis or review. ❖ May be assigned from the ribbon when available from some of the BATS pages (for example, analysis page or review task details). ❖ Some queue items may be assigned from the system (for example, when the first reviewer marks their task compete, then the system will automatically update the review queue for the second reviewer).

This document provides an overview of Queues, including:

- Queues page.
- Add new item to a queue.
- Update existing item in a queue.
- Use 'mark complete' for an item in a queue.

Queues Page

Queues may be used to create or manage actions (tasks or assignments) such as an agency analysis or review.

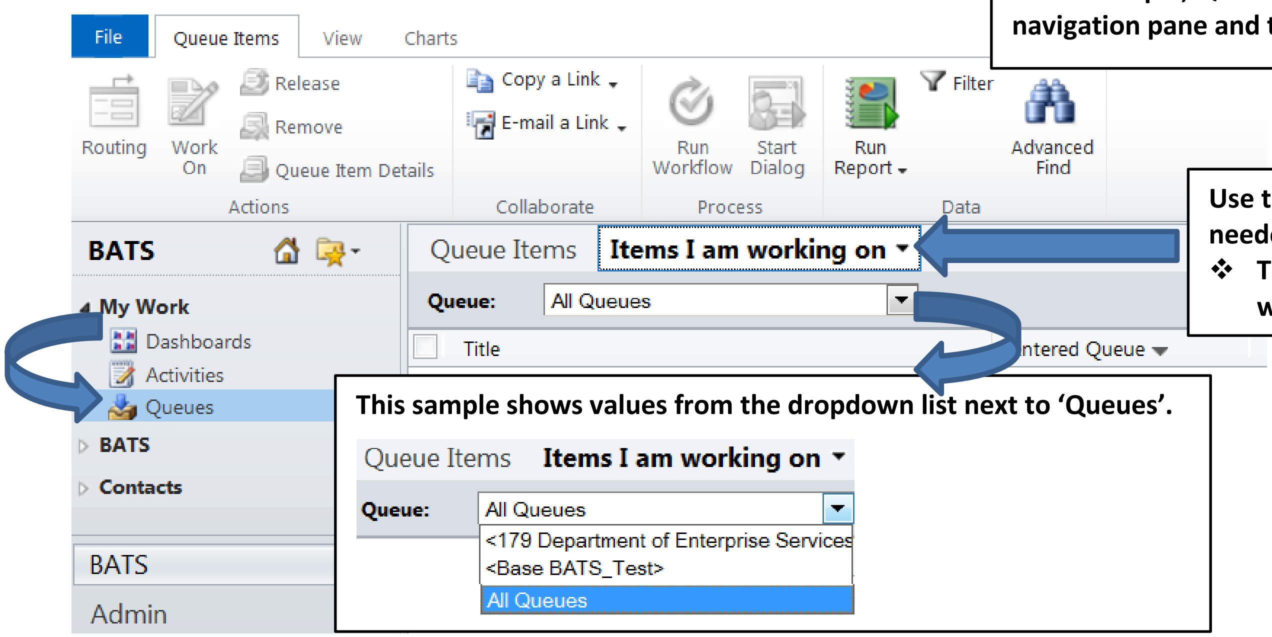
- Views from the Queues page may be used to display lists of items. For example, 'All Items' or 'Items available to work on' are system views that may be available from a dashboard and/or from the Queues page on the left-side navigation pane (under BATS/My Work/Queues).
- Queues may be assigned from the ribbon when available from some of the BATS pages (such as an agency analysis page).

Sample: Queues page.

In this sample, Queues was selected from the left-side navigation pane and the Queues page is displayed.

Use the dropdown to change views if needed.

- **This sample uses the 'Items I am working on' view.**

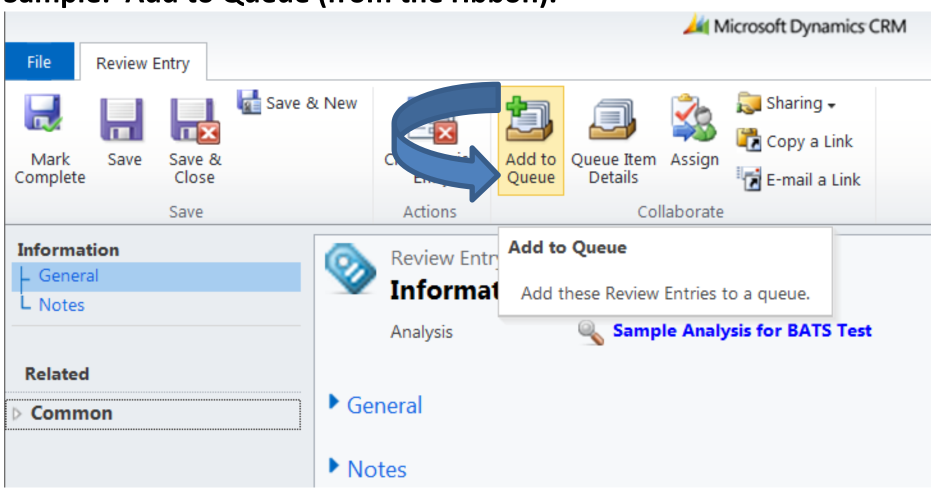


Add New Item to a Queue
Queues may be assigned from the ribbon when available from some of the BATS pages (such as an agency analysis page in the review task details section).

To add a new item to a queue from a BATS page:
1. **Select:** Add to Queue (from ribbon). The system will display Add to Queue - Webpage Dialog.
2. **Select:** Look Up (from the Add to Queue – Webpage Dialog).
3. **Select:** Checkbox next to name of queue (use Look Up from the Add to Queue – Webpage Dialog).
4. **Select:** Ok (in the Webpage Dialog box).
5. **Select:** Save.

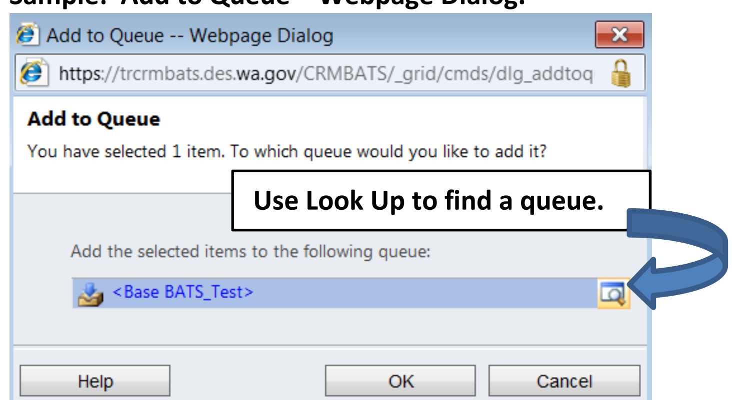
☑**Result**: Item (assignment or task) is saved to the Queue. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Add to Queue (from the ribbon).



In this sample, the Review Task Details section was opened on the Agency Analysis page and 'Add to Queue' was selected from the ribbon.

Sample: Add to Queue – Webpage Dialog.



Use Look Up to find a queue.

Update Existing Item in a Queue

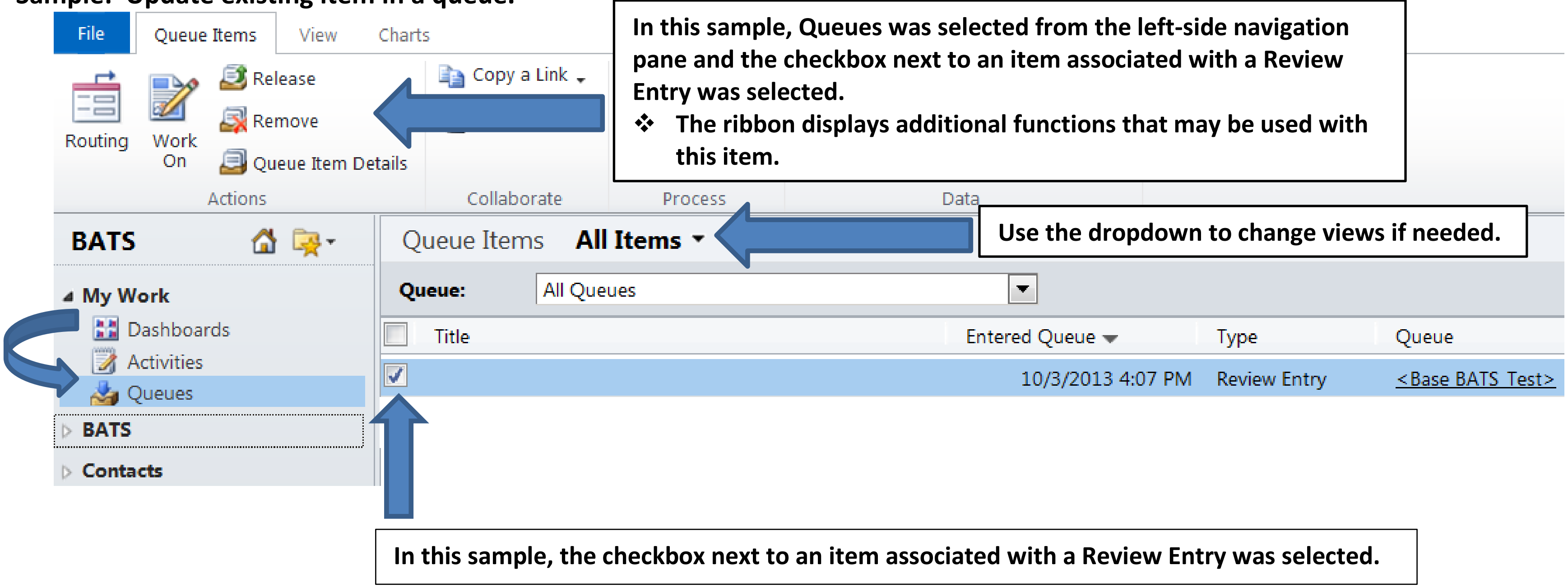
A list of existing items (tasks or assignments) is available from views on the Queues page on the left-side navigation pane under My Work.

To update an item in a Queue:

1. **Select:** Checkbox next to name/title of the item (task or assignment).
2. **Select:** Queue-related action (from the ribbon).
3. **Input:** Information about the action. Note: the information required will depend on which action was selected from the ribbon.

☑**Result**: Item (assignment or task) is updated. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Update existing item in a queue.



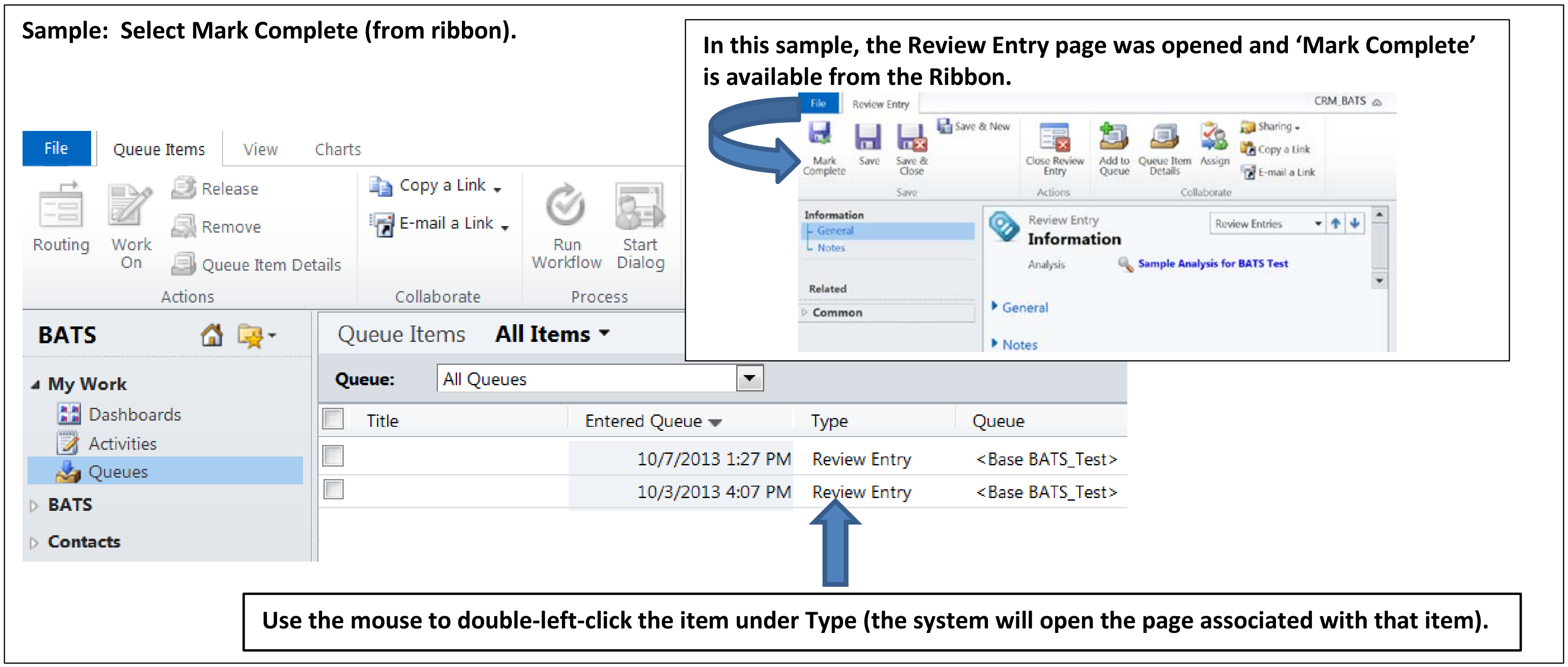
Use 'Mark Complete' for an Item in Queue

The 'Mark Complete' function may be used to update the status of an item to indicate that it is complete.

To update an item to indicate that it is complete ('mark complete'):

1. **Select:** Item in the queue (use the mouse to double-left-click on the item under Type and the system will open the page associated with that item).
2. **Input:** Information and/or notes if needed.
3. **Select:** Mark Complete (from the ribbon).

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



The Bill Analysis and Tracking System (BATS) includes dashboards that combine data from multiple areas and then display that data on one page for 'at a glance' status.

- Dashboards may also be used to perform actions such as apply filters, drill down for more details, or open an item to work on (such as an agency request, bill analysis, activity, or task).
- System online help is useful for common functions such as Dashboards. This online help is based on Microsoft Dynamics CRM so it will not include BATS-specific functions or information.

Type	Maintained by	Description
User Dashboard (My Dashboard)	**Agency Users**	Initially owned by the user who created the dashboard. ❖ May be set as a user's default dashboard. ❖ May be assigned to other users or teams. ❖ May be shared with other users or teams. ❖ May contain system charts and user charts. ❖ May contain a list that uses system views and personal (saved) views.
System Dashboard	**DES Technical Support Staff**	Available to all users. ❖ Initially set as the default dashboard for all users. ❖ Only contains system charts (not user charts).

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

- Select dashboard.
- Set default dashboard.
- Create new dashboard.
- Edit (change) dashboard.
- Share dashboard.
- Assign dashboard.
- Delete dashboard.

Select Dashboard

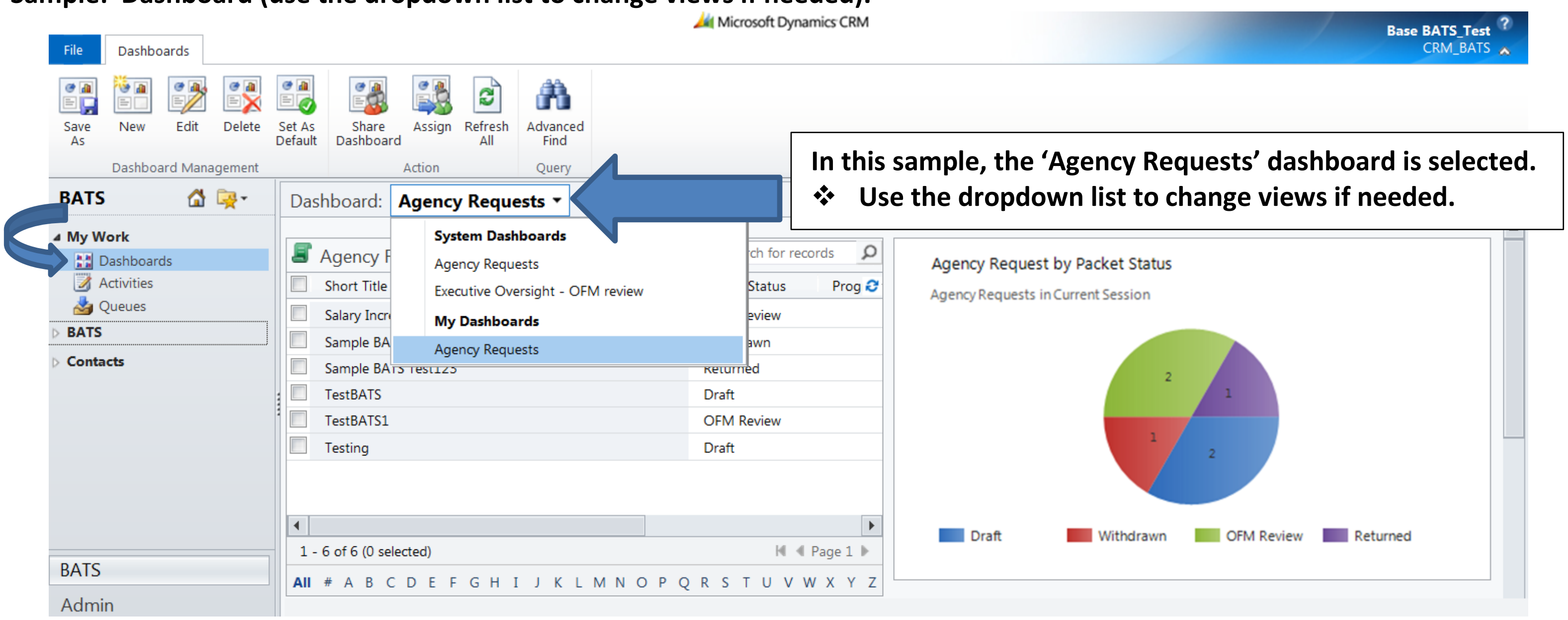
The list of dashboards available for use may be selected from the Dashboard dropdown list.

To select a dashboard from the BATS tab (left-side navigation pane):

1. **Select:** My Work (left-side navigation pane).
2. **Select:** Dashboards (left-side navigation pane).
3. **Select**: Dashboard (use the dropdown list to change views if needed).

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

Sample: Dashboard (use the dropdown list to change views if needed).



Change Default Dashboard

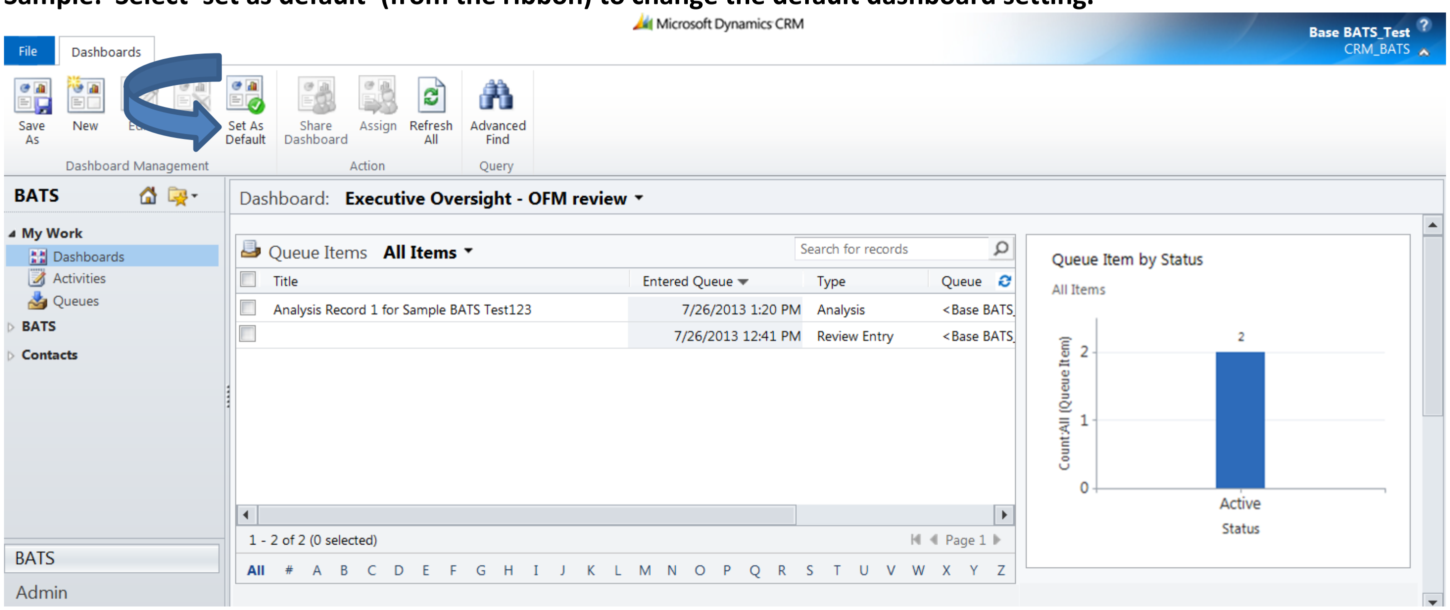
The default dashboard will be displayed as the first page when a user accesses BATS.

To change the default dashboard setting (so that a different dashboard displays as the default):

1. **Select:** My Work (left-side navigation pane).
2. **Select:** Dashboards (left-side navigation pane).
3. **Select**: Dashboard to be set as the default (use the dropdown list to change views if needed).
4. **Select**: Set As Default (from the ribbon bar).

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

Sample: Select 'set as default' (from the ribbon) to change the default dashboard setting.



Create New Dashboard From 'Scratch'

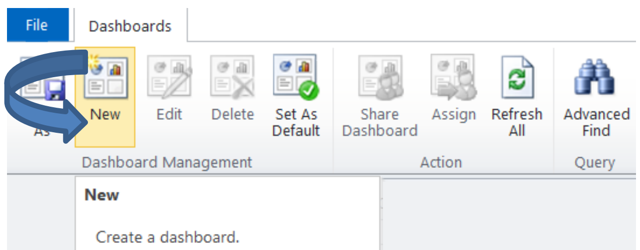
A dashboard may be created 'from scratch' or from another existing dashboard.

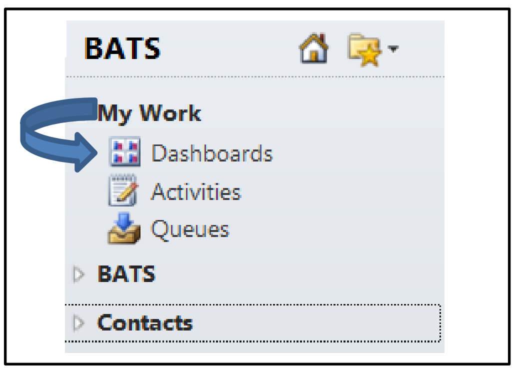
To create a dashboard 'from scratch':

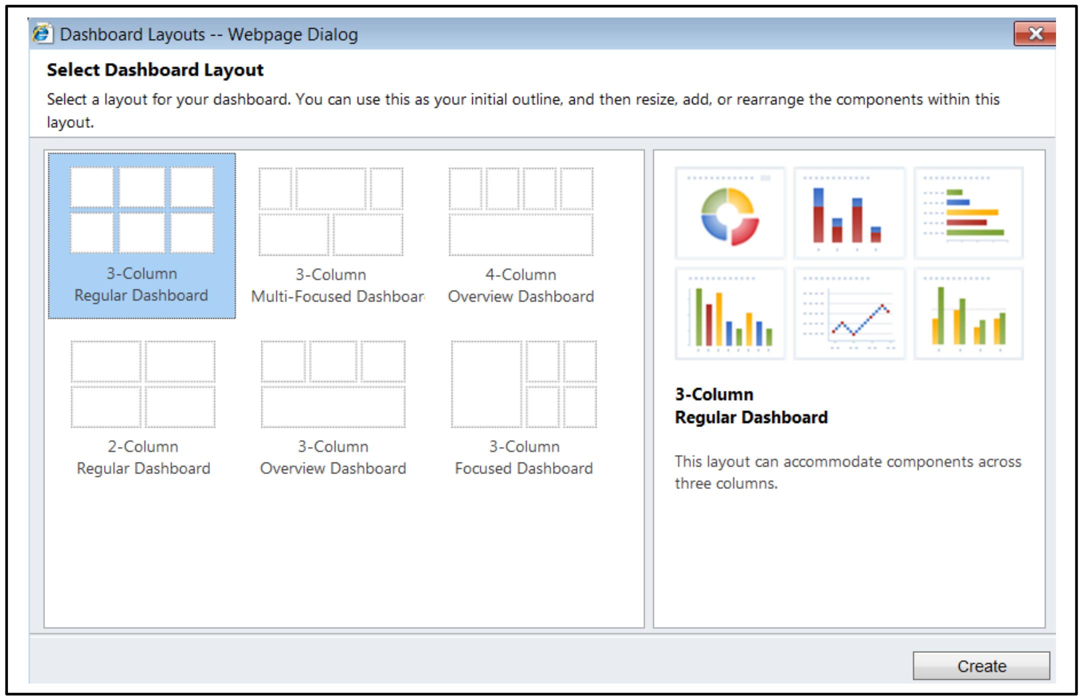
1. **Select:** My Work (left-side navigation pane).
2. **Select:** Dashboards (left-side navigation pane).
3. **Select**: New (from the ribbon bar).

☑**Result**: The system will display sample layouts that may be selected when creating a new Dashboard. 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 create a new dashboard from 'scratch'.

Sample: New (from the ribbon bar).







Create New Dashboard From 'Scratch' (continued)

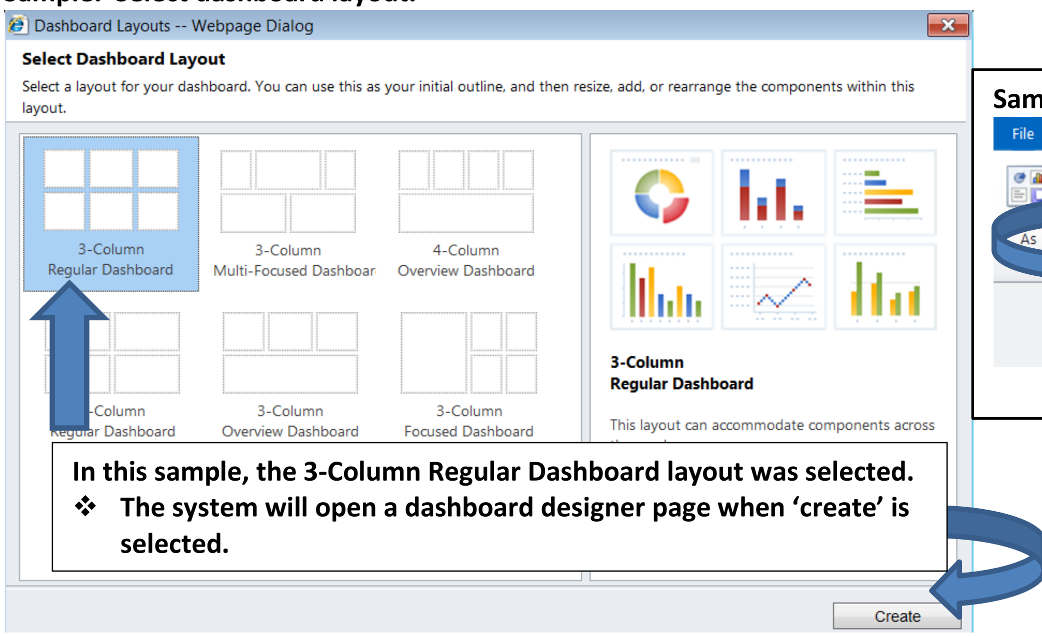
To continue steps needed to create a new dashboard from 'scratch':

1. **Select**: Dashboard layout (from the sample layouts provided by the system).
2. **Select**: Create. The system will open a dashboard designer page based on the dashboard layout selected.
3. **Input**: Name of new Dashboard.
4. **Select**: Save.

☑**Result**: Dashboard is saved (columns will still be empty because there are additional steps needed to complete the dashboard components). 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 create a new dashboard from 'scratch'.

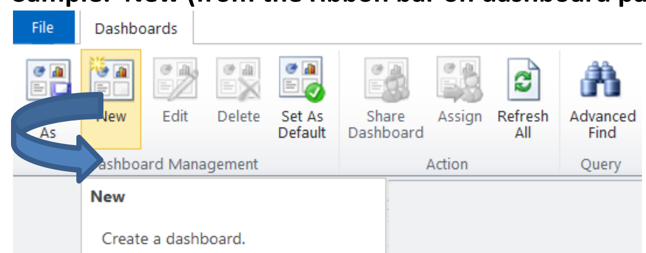
Sample: Select dashboard layout.



In this sample, the 3-Column Regular Dashboard layout was selected.

- ❖ **The system will open a dashboard designer page when 'create' is selected.**

Sample: New (from the ribbon bar on dashboard page).



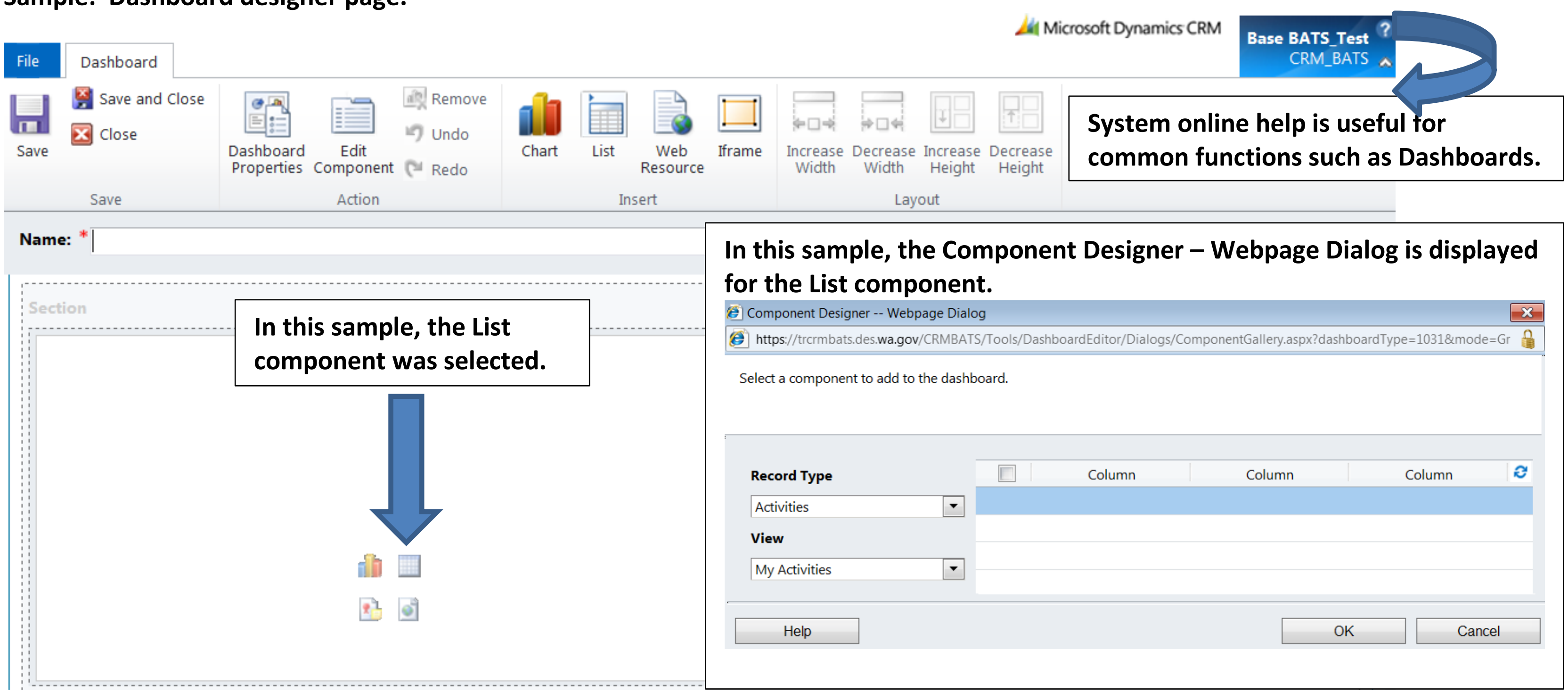
Create New Dashboard From 'Scratch' (continued)

To continue steps needed to create a new dashboard from 'scratch':

1. **Select**: Component to be displayed on the dashboard. The system will open a Webpage Dialog based on the selection.
2. **Select**: Values and/or record type to be displayed on the dashboard.
3. **Select**: View to be displayed on the dashboard.
4. **Select**: OK (from the Webpage Dialog).
5. **Select**: Save.

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

Sample: Dashboard designer page.



Create New Dashboard From 'Scratch' (continued)

There are several different dashboard components that may be displayed.

- ❖ Lists are used extensively for BATS dashboards since they provide a quick 'shortcut' to activities and assignments (user may select an activity or assignment from a list and the system will open the page associated with that activity or assignment).

Component	Steps to add record components
Chart 	To add Chart components to the new dashboard: 1. **Select**: Record Type (use the dropdown list to select this). 2. **Select**: View (use the dropdown list to select this). 3. **Select**: Chart (use the dropdown list to select this). 4. **Select**: OK.
List 	To add List components to the new dashboard: 1. **Select**: Record Type (use the dropdown list to select this). 2. **Select**: View (use the dropdown list to select this). 3. **Select**: OK.
Web Resource 	To add Web Resource components to the new dashboard: 1. **Select**: Web resource (use the search/lookup function to select this). 2. **Input**: Field Name and Properties (if different than the default values shown). 3. **Select**: Checkbox (if needed to display label on the dashboard). 4. **Select**: Checkbox (if needed to display as Visible by default). 5. **Select**: Checkbox (if needed to display Web Resource in Read Optimized Form).
Iframe 	To add Iframe components to the new dashboard: 1. **Input**: Name (if different than the default value shown). 2. **Input**: URL (if different than the default value shown). 3. **Select**: Checkbox (if needed to Pass record object-type code and unique identifier as parameters). 4. **Input:** Label (if different than the default value shown). 5. **Select**: Checkbox (if needed to display label on the dashboard). 6. **Select**: Checkbox (if needed to Restrict cross-frame scripting, where supported). 7. **Select**: Checkbox (if needed to Specify the default visibility of this control). 8. **Select**: OK.

Create New Dashboard From Existing Dashboard

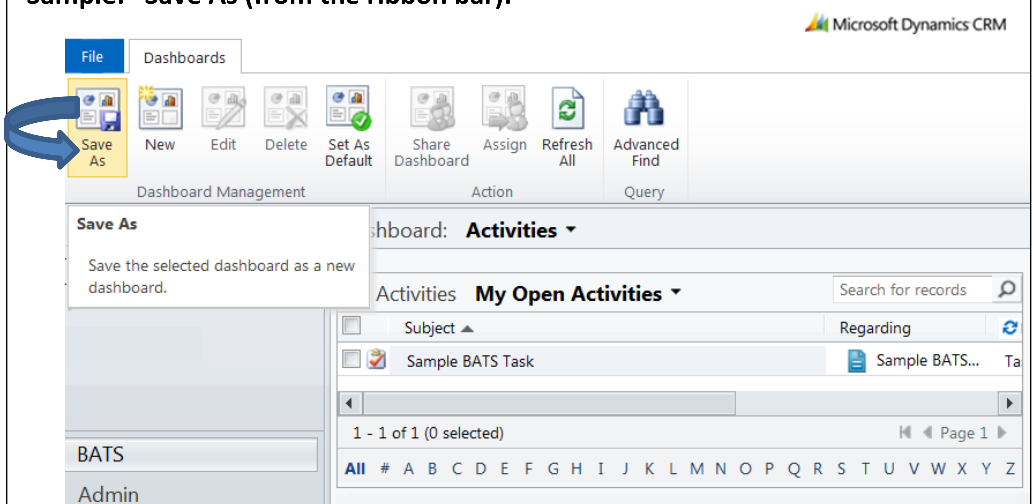
A dashboard may be created ‘from scratch’ or from another existing dashboard.

To create a dashboard from another existing dashboard:

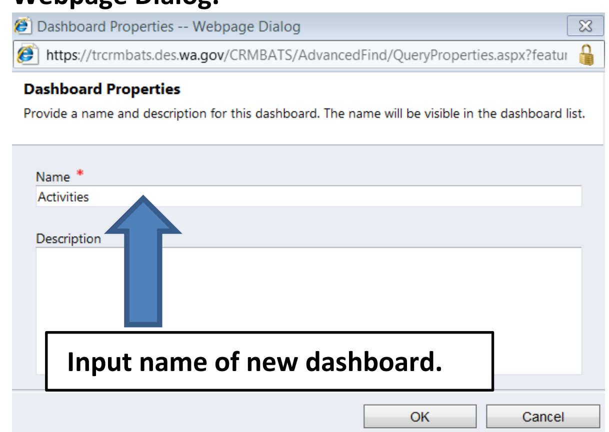
1. **Select:** My Work (left-side navigation pane).
2. **Select:** Dashboards (left-side navigation pane).
3. **Select**: Dashboard. This is the existing dashboard which will be used as starting point for new dashboard.
4. **Select**: Save As (from the ribbon bar). The system will open Dashboard Properties – Webpage Dialog.
5. **Input**: Name of new Dashboard.
6. **Select:** OK (from Webpage Dialog).

☑**Result**: New dashboard is created (saved). An error message will be displayed if the action is not allowed due to security permissions or system validation error. Note: columns and components may be changed before or after the dashboard is ‘saved as’.

Sample: Save As (from the ribbon bar).



In this sample, Save As was selected from the ribbon bar and the system opened Dashboard Properties – Webpage Dialog.



Edit (Change) Dashboard

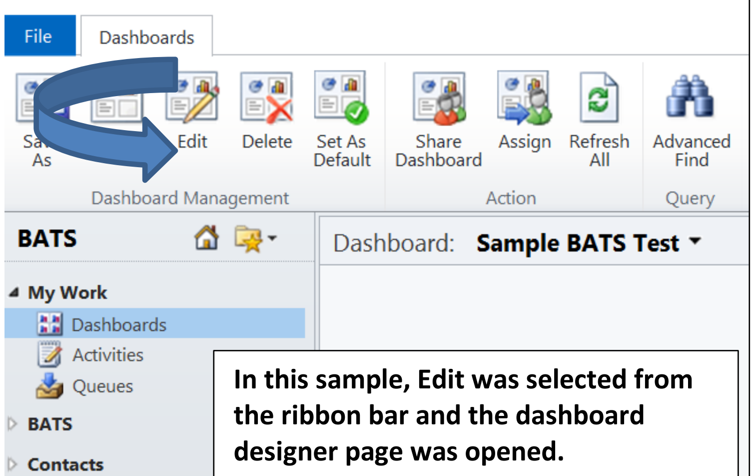
A dashboard may only be edited (changed) by the user who created it (or by a user who has been assigned ownership to the dashboard).

To edit (change) a dashboard:

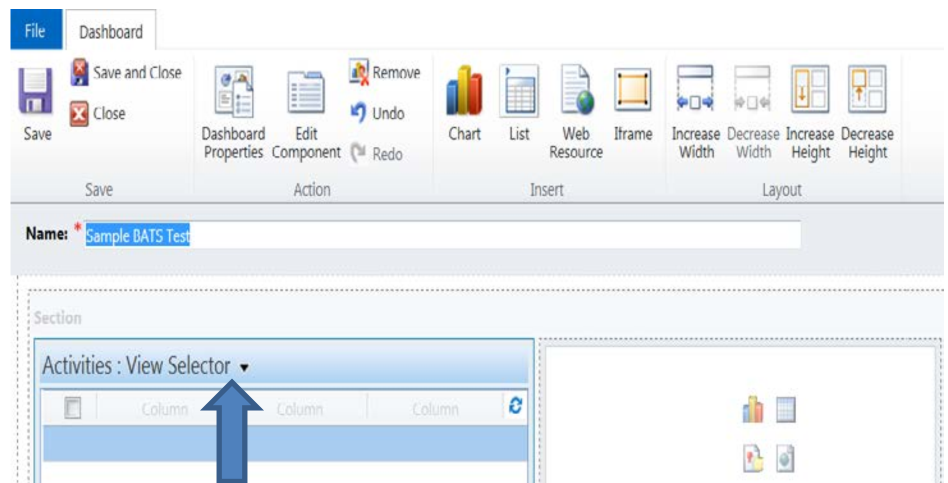
1. **Select**: Dashboard to be edited (changed).
2. **Select**: Edit (from the ribbon bar). The system will open the dashboard designer page.
3. **Select**: Component to be edited (changed).
4. **Select**: Component values (from the ribbon bar and/or Webpage Dialog).
5. **Select**: Save.

☑**Result**: Dashboard is saved with edits (changes). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Edit dashboard (from the ribbon bar).



In this sample, Edit was selected from the ribbon bar and the dashboard designer page was opened.



In this sample, the dashboard section with a List component for 'Activities: View Selector' is selected and the designer page has additional functions available from the ribbon bar.

Edit (Change) Dashboard Properties

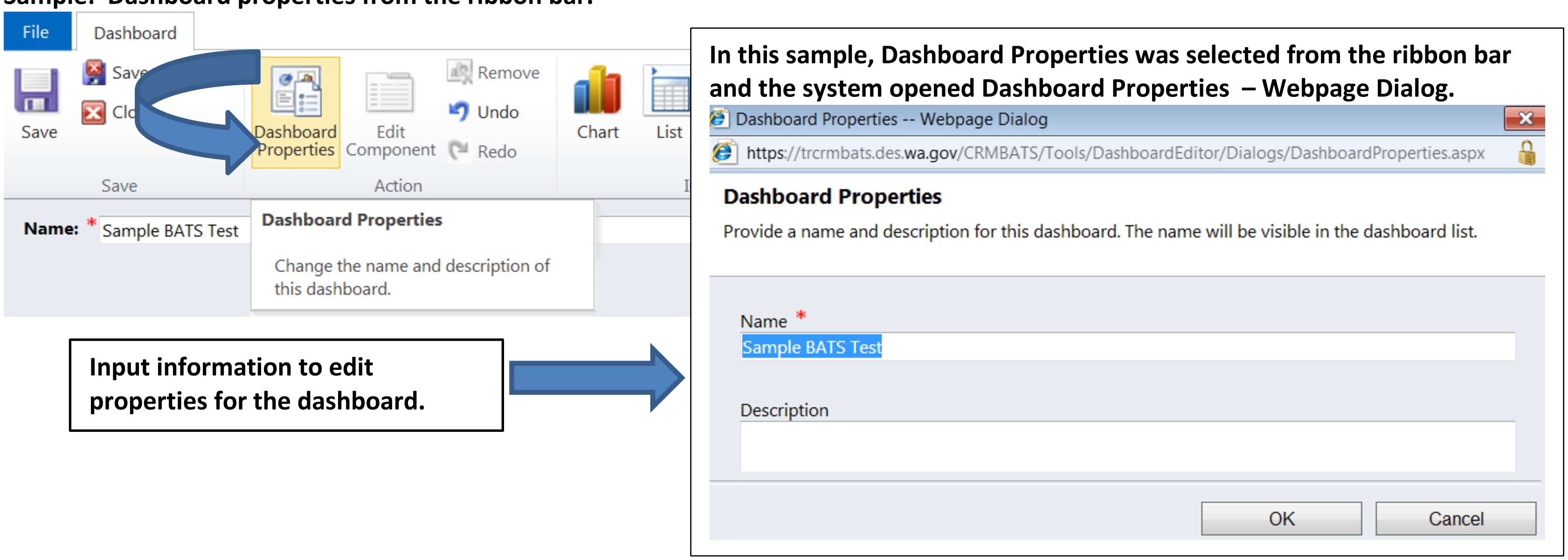
Properties on a dashboard may be edited (changed) by the user who created it (or by a user who has been assigned ownership to the dashboard).

To edit (change) properties on a dashboard:

1. **Select**: Dashboard to be edited (changed).
2. **Select**: Edit (from the ribbon bar). The system will open the dashboard designer page.
3. **Select**: Dashboard Properties (from the ribbon bar).
4. **Input**: Information to edit properties for the dashboard.
5. **Select**: OK (in Dashboard Properties – Webpage Dialog).
6. **Select**: Save.

☑**Result**: Dashboard is saved with property edits (changes). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Dashboard properties from the ribbon bar.



Edit (Change) Dashboard Components

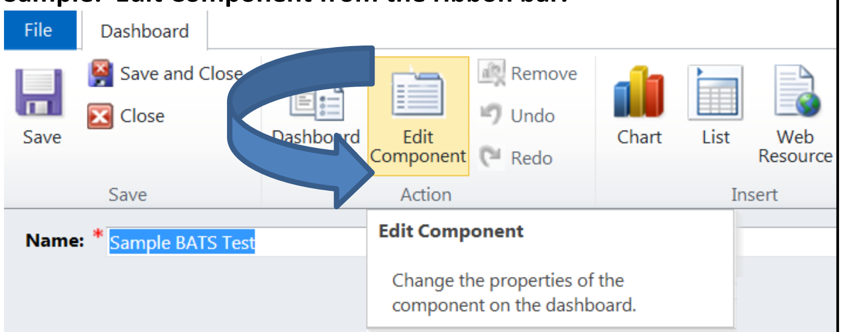
Components on a dashboard may be edited (changed) by the user who created it (or by a user who has been assigned ownership to the dashboard).

To edit (change) components on a dashboard:

1. **Select**: Dashboard to be edited (changed).
2. **Select**: Edit (from the ribbon bar). The system will open the dashboard designer page.
3. **Select**: Component. This is the component to be edited (changed).
4. **Select**: Edit Component (from the ribbon bar). The system will open a Webpage Dialog based on the Component selected.
5. **Input**: Information to edit the component. The Webpage Dialog will provide options based on the Component selected.
6. **Select**: OK (Webpage Dialog).
7. **Select**: Save.

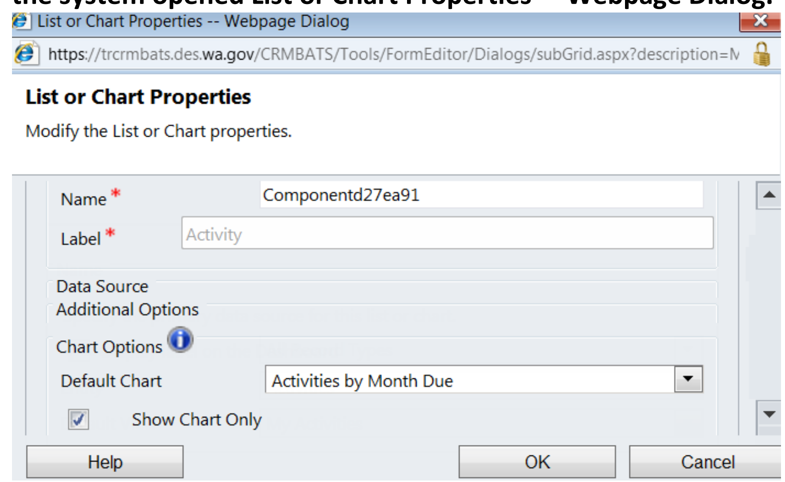
☑**Result**: Dashboard is saved with component edits (changes). An error message will be displayed if the action is not allowed due to security permissions or system validation error

Sample: Edit Component from the ribbon bar.



Input information to edit component properties for the dashboard.

In this sample, Edit Component was selected from the ribbon bar and the system opened List or Chart Properties – Webpage Dialog.



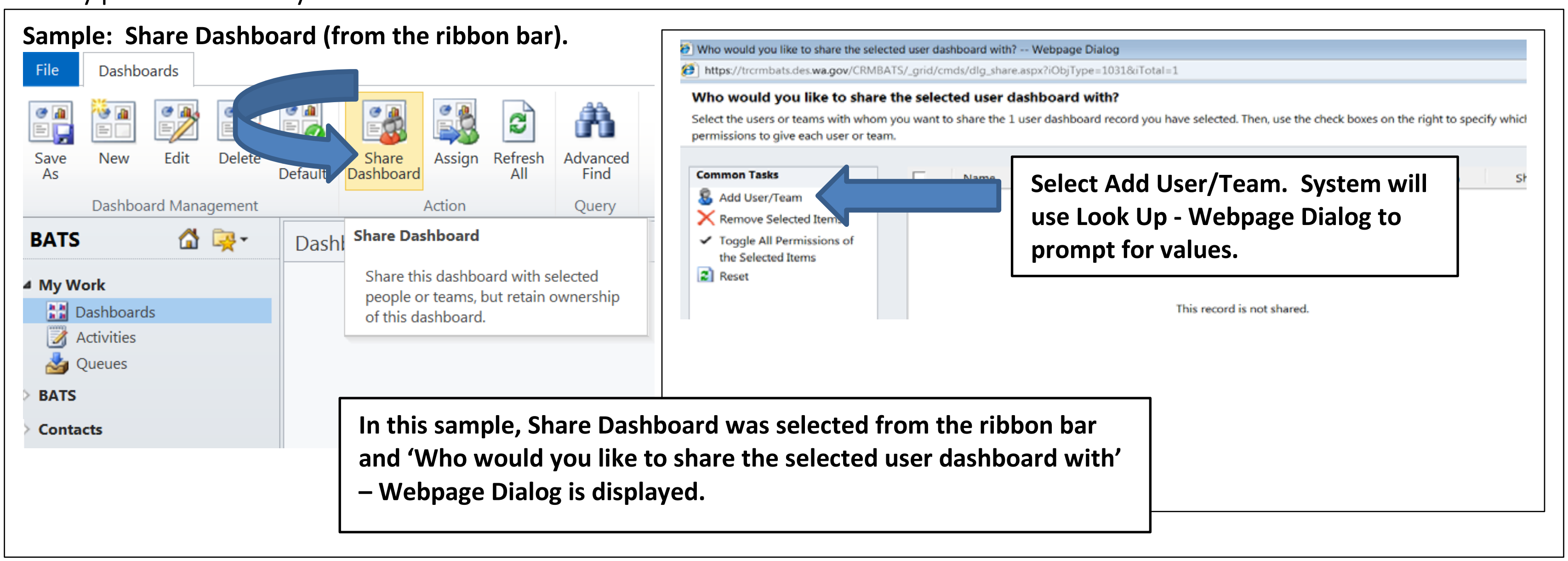
Share Dashboard

A dashboard may be shared with other users or teams. The ownership of the dashboard is retained.

To share an existing dashboard:

1. **Select:** My Work (left-side navigation pane).
2. **Select:** Dashboards (left-side navigation pane).
3. **Select**: Dashboard to be shared.
4. **Select**: Share Dashboard (from the ribbon bar).
5. **Select:** Add User/Team. Use Look Up to search for user or team.
6. **Select:** Values provided from Webpage – Dialog. The system will prompt for values using Look Up.
7. **Select:** OK (from Webpage Dialog).

☑**Result**: Dashboard is shared but ownership is retained. An error message will be displayed if the action is not allowed due to security permissions or system validation error.



Assign Dashboard

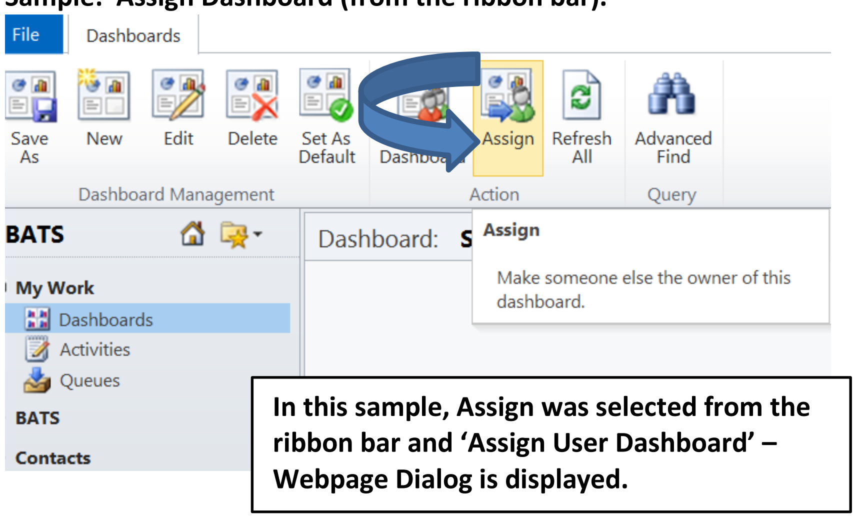
A dashboard may be assigned to other users or teams. The ownership of the dashboard is assigned.

To assign a dashboard:

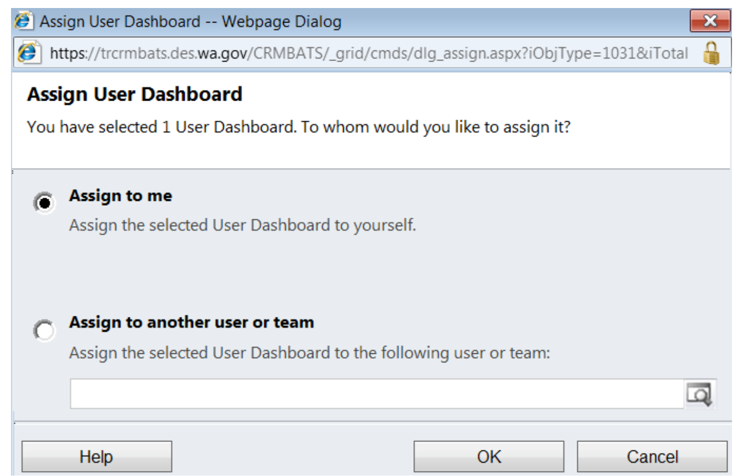
1. **Select:** My Work (left-side navigation pane).
2. **Select:** Dashboards (left-side navigation pane).
3. **Select**: Dashboard to be assigned.
4. **Select**: Assign (from the ribbon bar).
5. **Select**: Assign to me or Assign to another user or team.

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

Sample: Assign Dashboard (from the ribbon bar).



Select 'Assign to me' or 'Assign to another user or team'.



Delete Dashboard

A dashboard may only be deleted by the user who created it (or by a user who has been assigned ownership to the dashboard).

To delete a dashboard:

1. **Select:** My Work (left-side navigation pane).
2. **Select:** Dashboards (left-side navigation pane).
3. **Select**: Dashboard to be deleted.
4. **Select**: Delete (from the ribbon bar).
5. **Select**: OK (from Confirm Deletion – Webpage Dialog).

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

Sample: Delete (from the ribbon bar).