Washington State Department of Enterprise Services

BILL ANALYSIS AND TRACKING SYSTEM (BATS)

Quick Reference Guide – For Legislation Tracking and Analysis

December 2013

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Introduction to BATS

Brief Overview of (Bill Analysis and Tracking System) BATS

- **Documentation is available online at:**
  http://www.des.wa.gov/services/IT/SystemSupport/Training/Pages/trainingCourseMaterials.aspx
- **Help is available for BATS specific information:**
  DES Solutions Center (360) 407-9100 solutionscenter@des.wa.gov
  DES Email servicecenter@des.wa.gov
- **Training Environment URL** **https://trcrmbats.des.wa.gov**
- **Production Environment URL** **https://crm.des.wa.gov**

Layout/Navigation

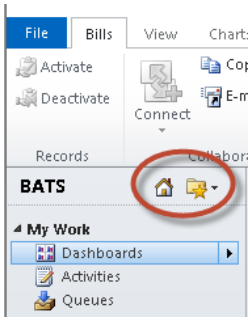
- **Dashboards are the default view when logging in. As an administrator you can share customized dashboards (views).**

  - **The Top Right Help, will take you to Microsoft CRM Help**

  - **BATS will open multiple pages. The left navigation (Nav) and Ribbon Bar options will change according to the screen you are on.**

  - **Yellow Ribbon Bar, X out of (you will only need to do this one time).**

  - **Home Button, will take you to your home page**
  - **Recently Viewed Pages and Views (You can pin items for favorites)**



  - **Do not use the Back Button within the BATS system**

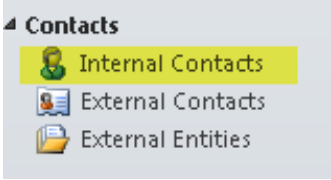
Contacts

- **There are three different types of contacts within the BATS system**

Tip You will need to have the Admin, Coordinator, or Analyst security role to create certain types of contacts for your agency**

#1 – Internal Contacts (USERS)

- **An Internal Contact is any person within your agency who will be accessing the system**
- **To create an Internal Contact (System Users), click on the "Internal Contacts" link located on Left Nav**



  - **Click "New" located on the top Ribbon Bar**

  - **User Name**
    - **If you are inside the State Government Network (SGN) the user name would be the user's Domain\UserID. Hit the "Tab" key and it will populate the rotation of the employee's information for you.**

Tip If no information populates, there is something incorrect with their Domain\UserID. You may want to check with your IT Department to verify. The * are required fields. The user will not be able to log in if you enter the information manually.**

    - **If you are a SAW user (outside the SGN), you will need to create a SAW account with your User ID as your email address. Enter the employee's email address into the User Name field and click on the "Tab" key.**

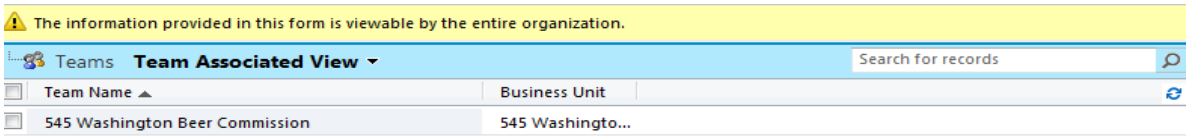
- **Click "Save"**

<u>Teams</u>

- **You will need to assign the User to "Analysis Assignment Update" Team for users who need the ability to assign a reviewer or preparer to an Analysis**

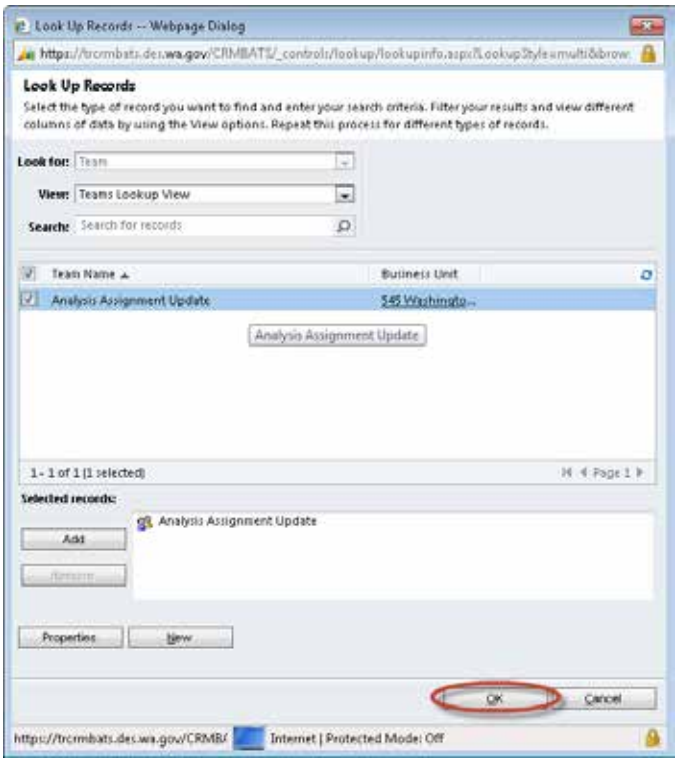
  - **Click on the Teams link on the Left Nav pane**

  - **Notice there is a team that has defaulted**



  - **Click "Add Existing Team" on the top Ribbon Bar**

- **Double Click the "Analysis Assignment Update" team and click "Ok"**



Security Roles

- **Assign Security Roles to each User by clicking on the "Security Roles" link located on Left Nav**

- **User Roles**

User Roles

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

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

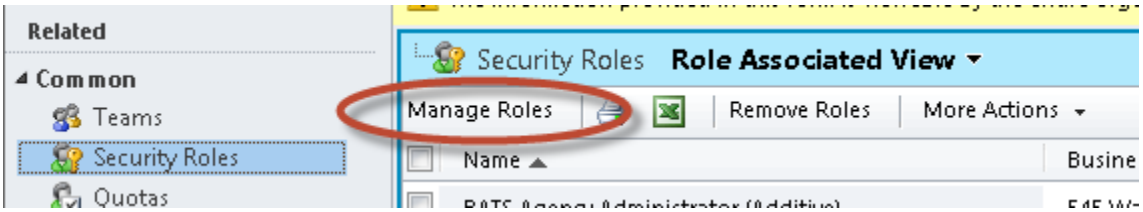
Quick Reference: BATS User Roles.

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

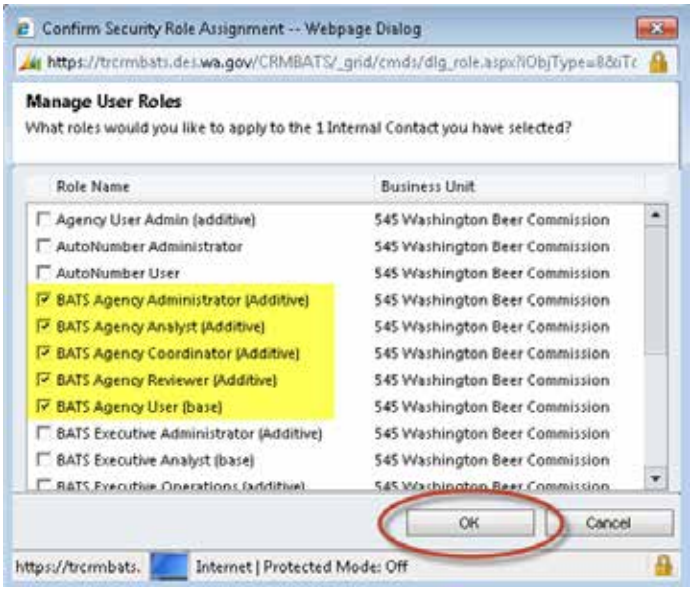
- **Tracking Roles: Tracking User vs. Team Tracking User**

Bill Tracking Role	Agencies and OFM/GOV	Bill Tracking
BATS Tracking User (additive)	Agency Analyst Agency Reviewer Agency Coordinator Agency Administrator Oversight Analyst Oversight Reviewer Oversight Coordinator Oversight Administrator Oversight Gov's Office	Additional role assigned to users who will track bills. Track bills for user. Receive email update (hourly and/or daily) for tracked bills.
BATS Team Tracking User (additive)	Agency Coordinator Agency Administrator Oversight Coordinator Oversight Administrator Oversight Gov's Office	Additional role assigned to users who will input/maintain agency bill tracking analysis. Create tracking for agency, division, and/or team. Create assignments for tracking.

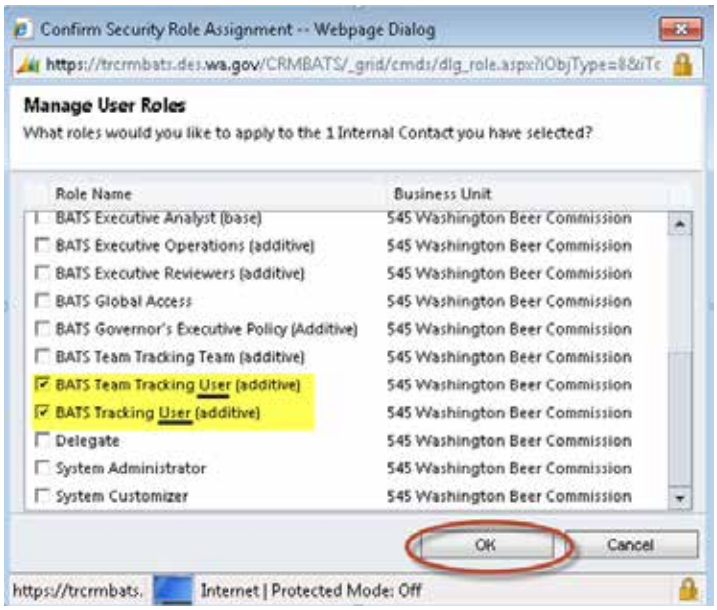
- **Click on "Manage Roles"**



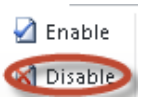
- **Assign Security Roles to the user and Click "Ok"**



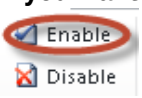
- **Assign Tracking Roles to the user and Click "Ok"**



- **<u>Disable & Enable User</u>**
  - **You cannot delete a user but you can disable them**
    - **Select the Internal Contact (User) you want to disable and Click "Disable " and "Confirm"**



    - **If you want to "Enable" the User, select the User and click "Enable"**

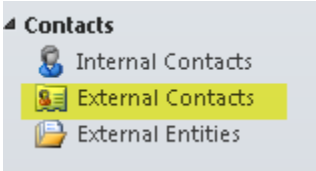


#2 - External Contact

- **An External Contact is someone not using the system, usually another agency. Legislators will be imported from LSC.**

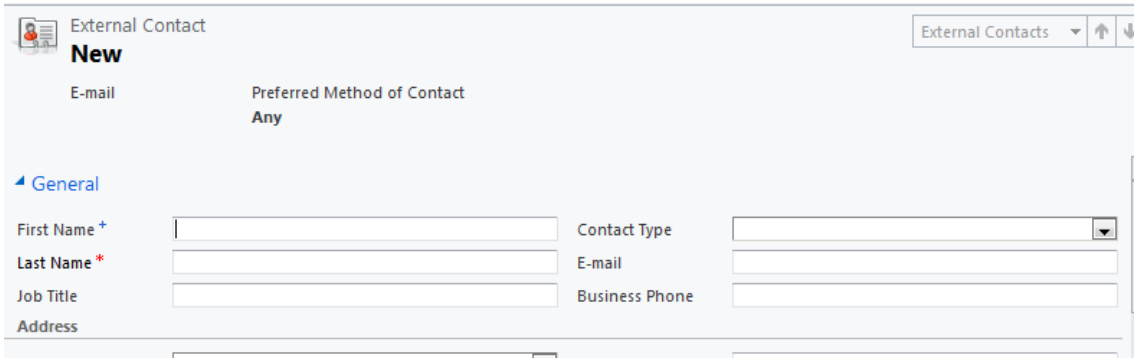
Tip Only Admin, Coordinator or Analyst role can create them, but viewable to everyone in the agency**

- **Click on "External Contacts" in Left Nav**

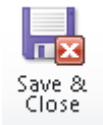


- **Click "New"**

- **Enter the External Contact Information**



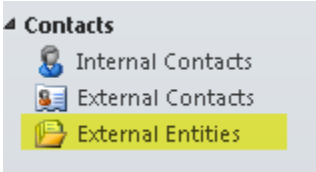
- **Click "Save & Close" in top Ribbon Bar**



#3 - External Entities

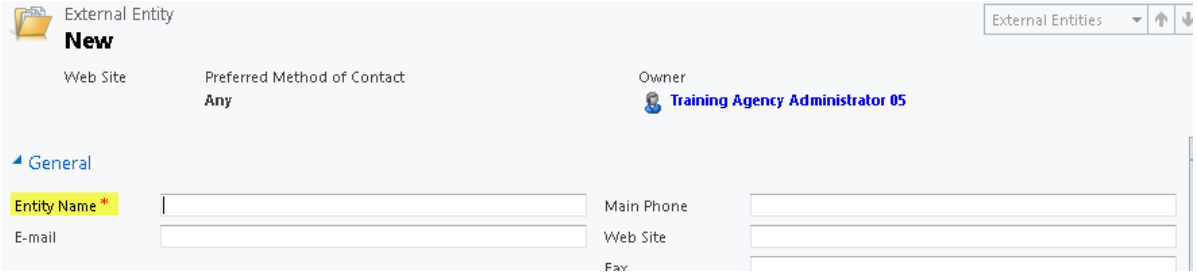
- **External Entities are groups or committees, not a person. This is someone outside of the system. An External Contact can be associated to an External Entity.**

  - **Click on "External Entities" to create an External Entity in Left Nav**

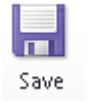


  - **Click "New" in top Ribbon Bar**

  - **Enter the External Entity Information**



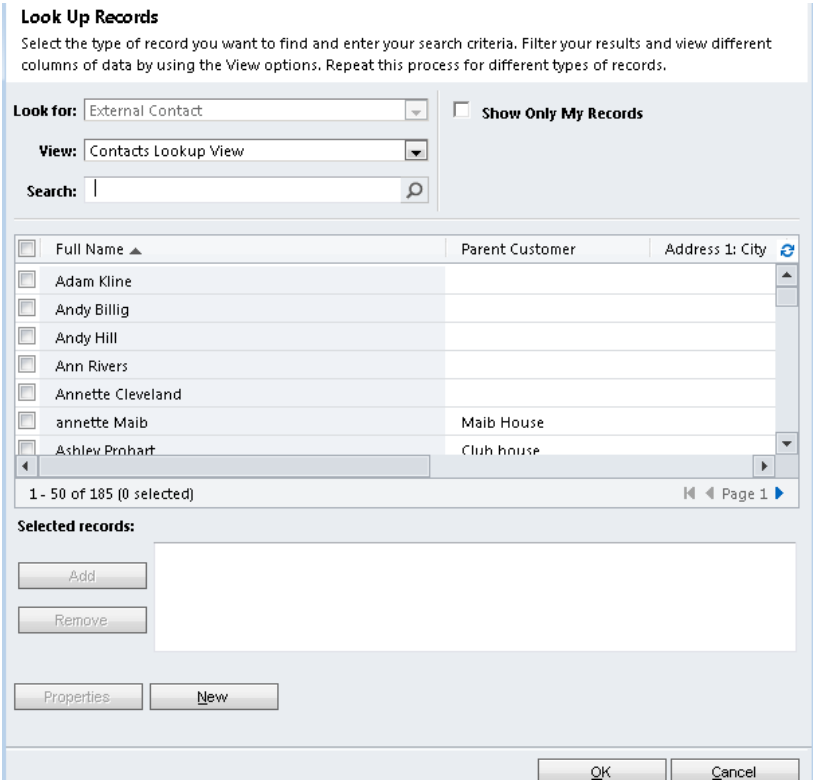
  - **Click "Save" in top Ribbon Bar**



  - **To link an External Contact to an External Entity, click the "External Contacts" link from within the External Entity**

- **Click “Add Existing External Contact” in top Ribbon Bar**

- **Select the External Contact from the Lookup Screen and click “Ok”**

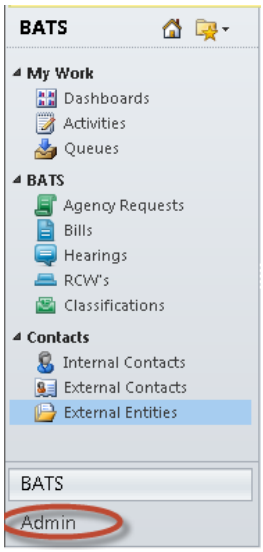


Divisions, Programs, Classifications

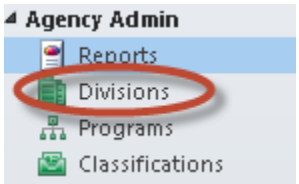
Type	Description
Division	Identifies specific division that may be associated with bill-related information. *Linked to agency administrator Business Unit. *May be used to identify a division related to a program.
Program	Identifies specific program that may be associated with bill-related information.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

Divisions

- **Click on the Admin Tab on Left Nav**

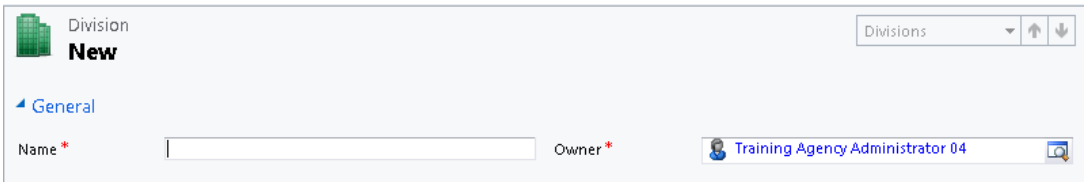


  - **Click "Divisions" in Left Nav**



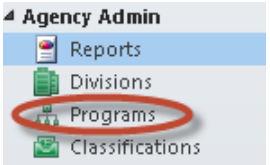
  - **To create a new Division, Click "New" in top Ribbon Bar**

- Enter the name of the Division and click “Save & Close” in top Ribbon Bar



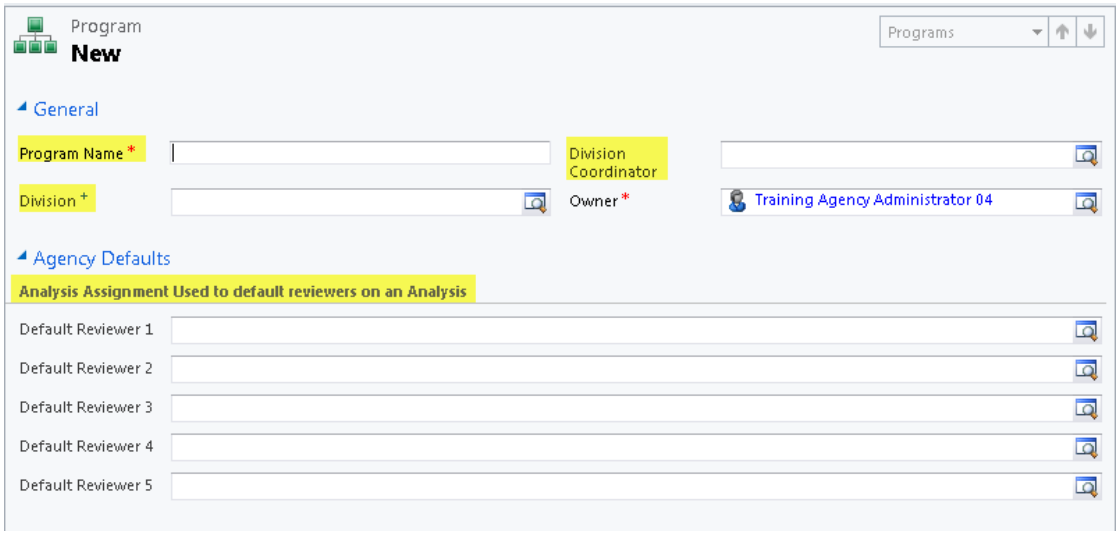
Programs

- Click “Programs” in Left Nav



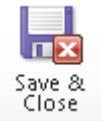
- To create a new Program, click “New” in top Ribbon Bar

- Enter the name of the Program



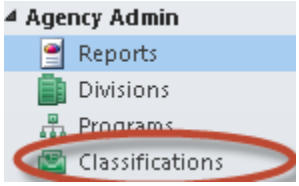
Tip You can assign the Program to a Division. You can assign multiple Programs to a Division. You can assign a default Program Coordinator and up to five Reviewers to a Program.**

- Click “Save & Close” in top Ribbon Bar

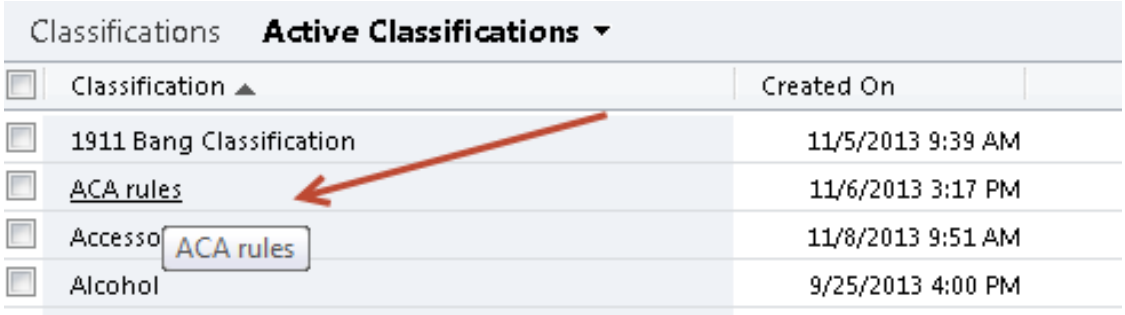


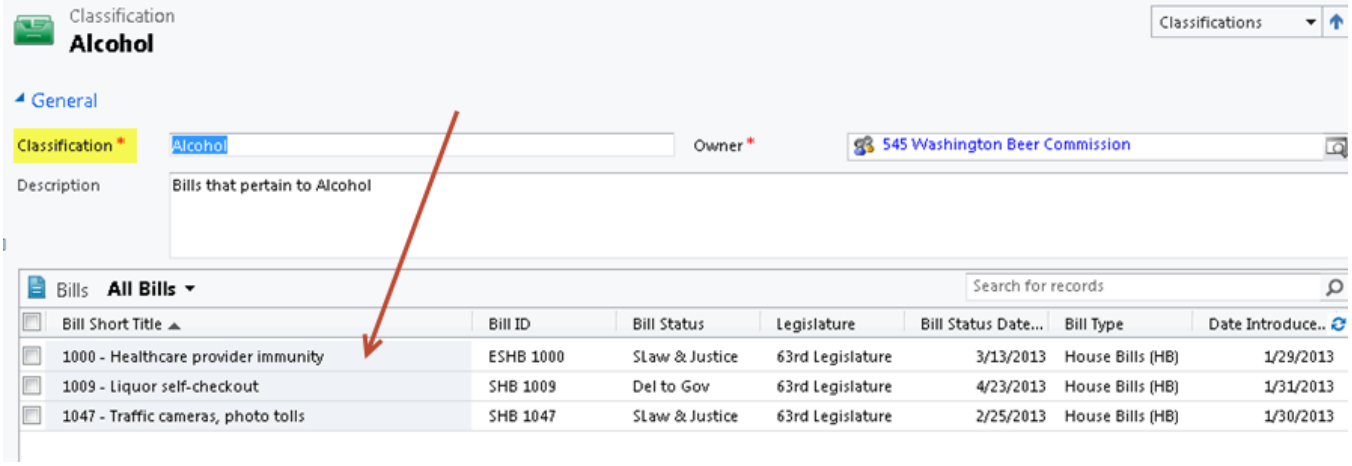
Classifications

- **Classifications are another way to categorize your bills into different buckets (Only Agency Administrators can create Classifications)**
  - **Click on "Classifications" in Left Nav to display the existing Classifications created by your agency**



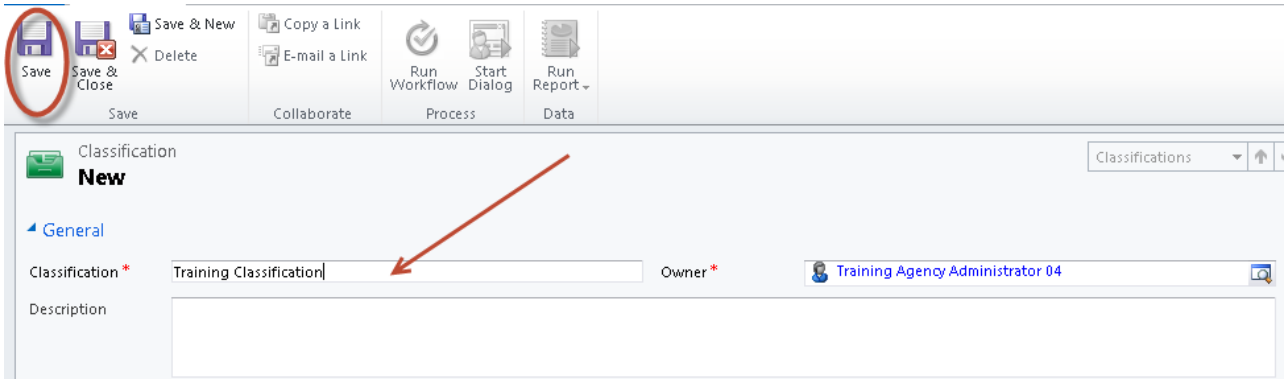
  - **Click on a Classification to display the bills associated with that Classification**



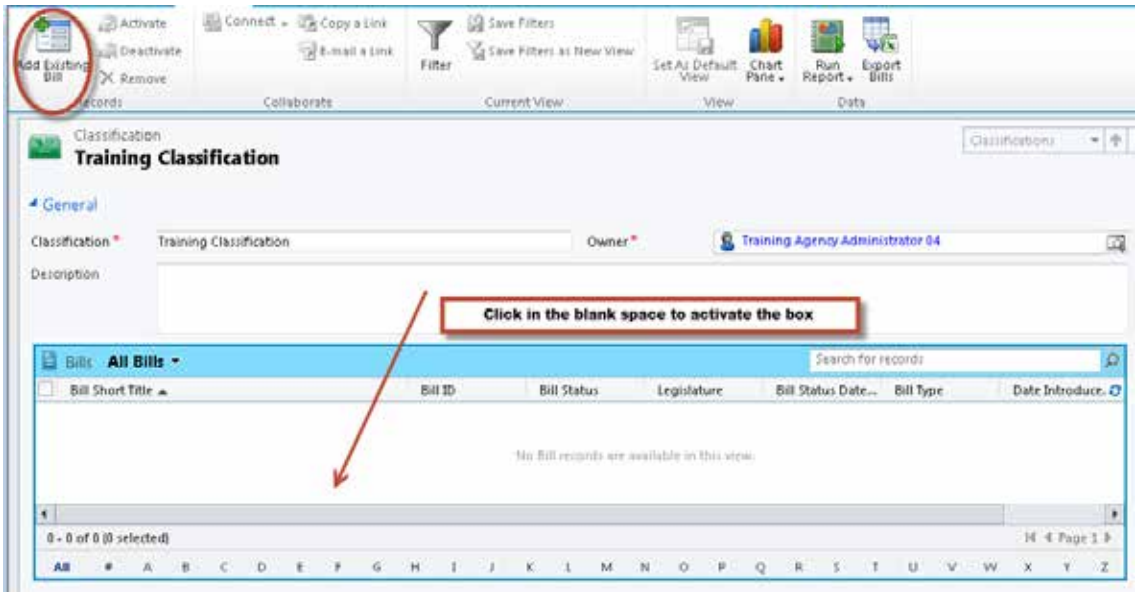


  - **To Create a New Classification, Click "New " in the Top Ribbon**

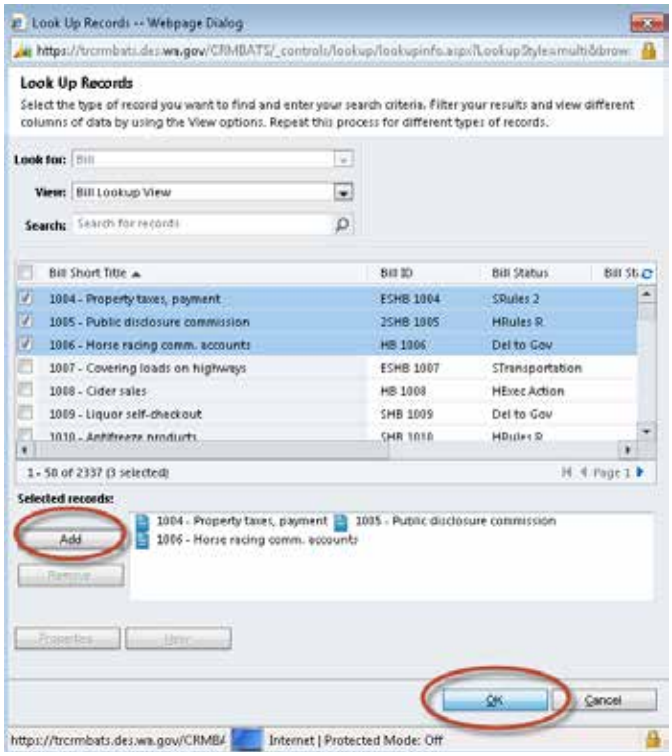
- **Name the Classification and click "Save"**



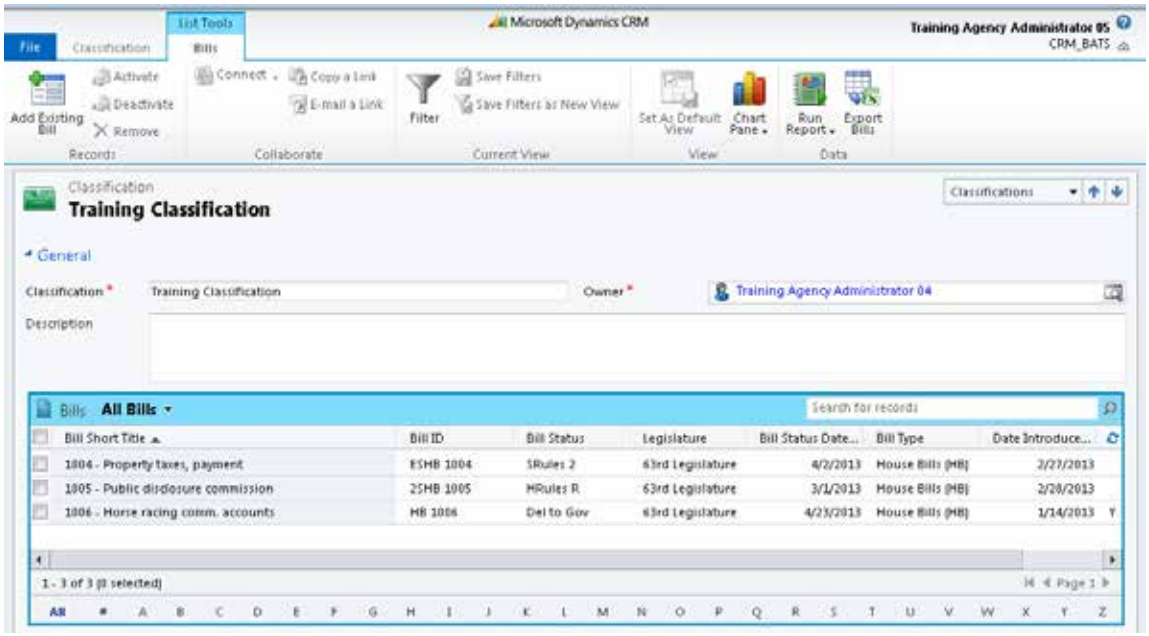
- **You can add multiple bills to a Classification. Click in the box and click "Add Existing Bill".**



- **Select the bills to add to this Classification, click “Add” and “Ok”**

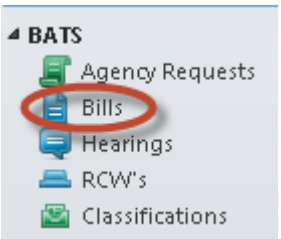


- **You can now see all the bills Classified with this Classification below**

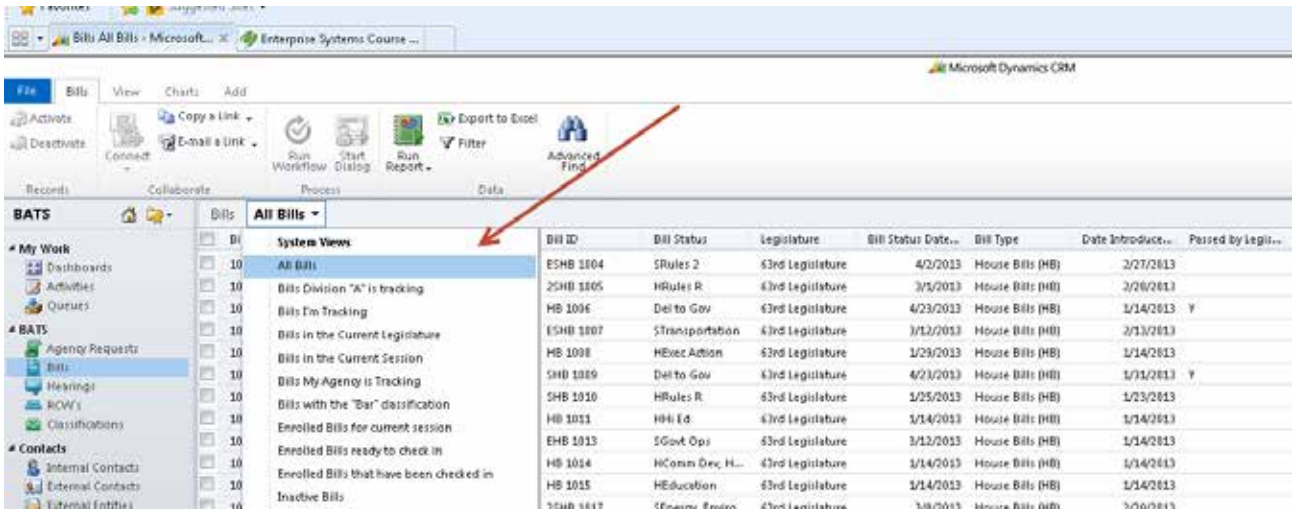


Bill Tracking and Analysis

- **Click "Bills" in Left Nav to show Bill Screen**



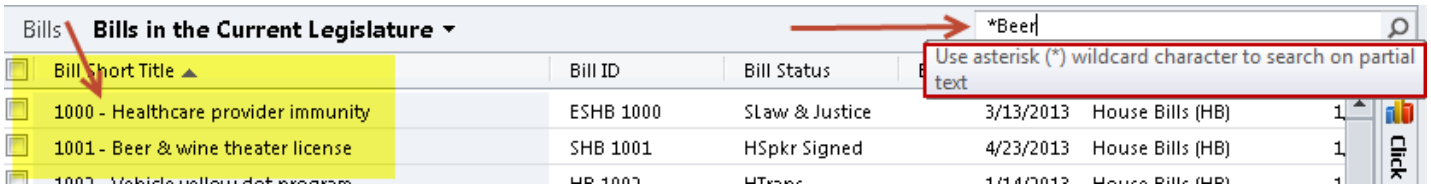
Notice the multiple views



Tip All bills are imported from LSC, you will not need to import bills.**

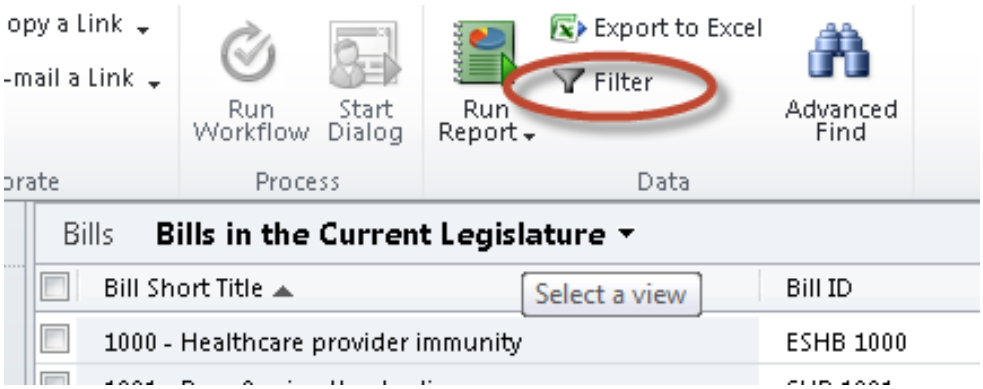
Search

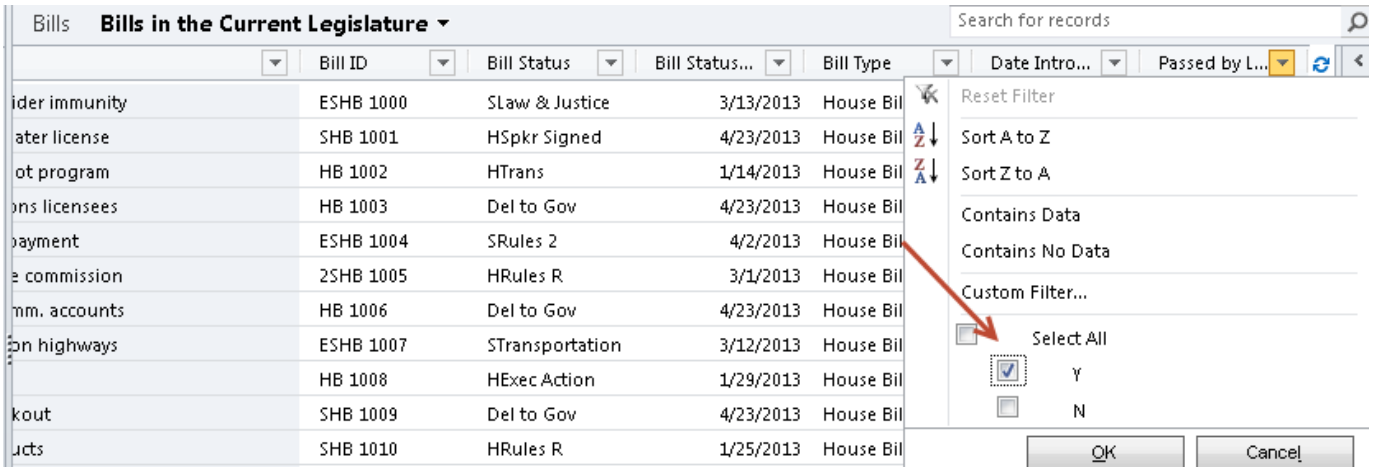
- **When searching for a bill, the search will only search on the data in first column. You can search by the Bill Number or text in the Bill Short Title. If searching on text, you will need to use the wildcard (*).**



Filter

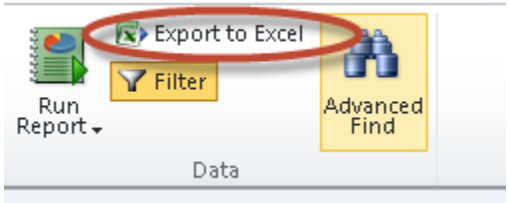
- **To limit the data that is displayed, you can use the Filter Button located in the top Ribbon Bar**





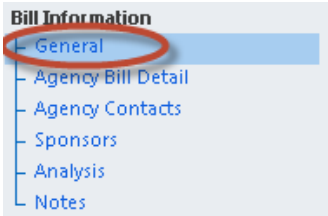
Export Data to Excel

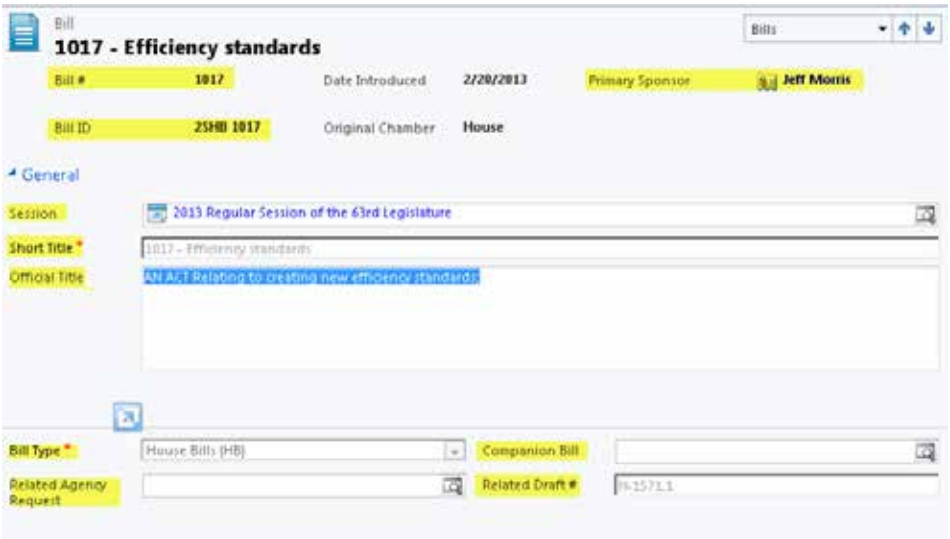
- **The data that is displayed can be exported to Excel**



Bill Elements

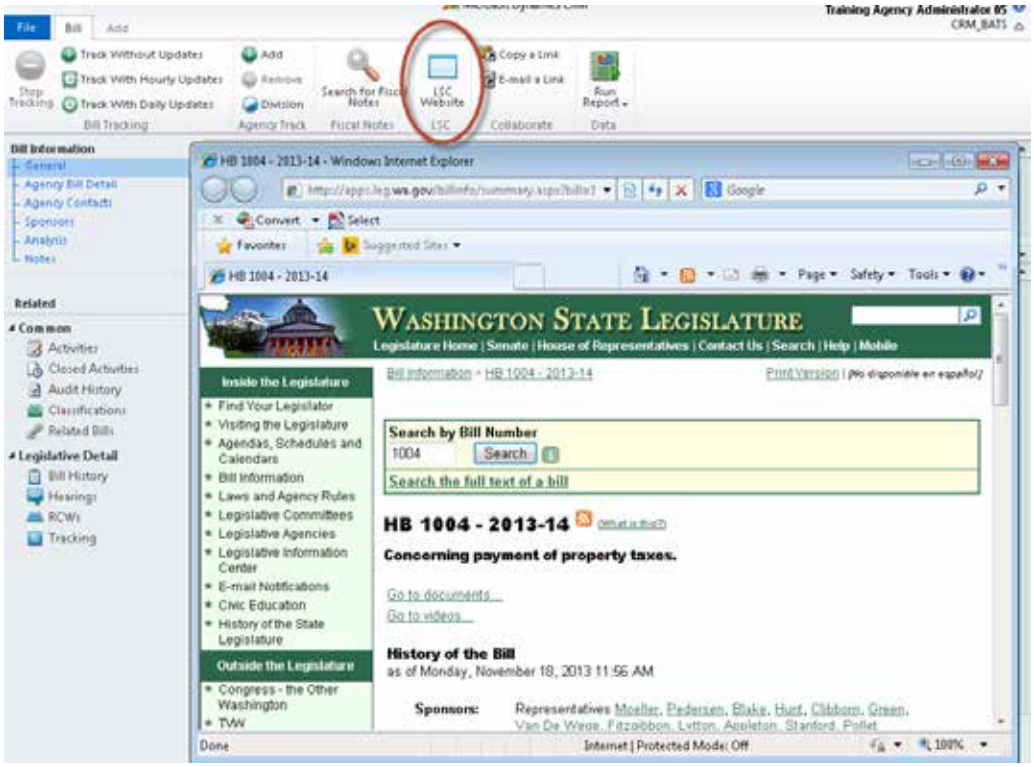
- **Click on a bill to view the elements on the bill**
  - **General Section – Highlighted fields below are populated from LSC and cannot be changed**



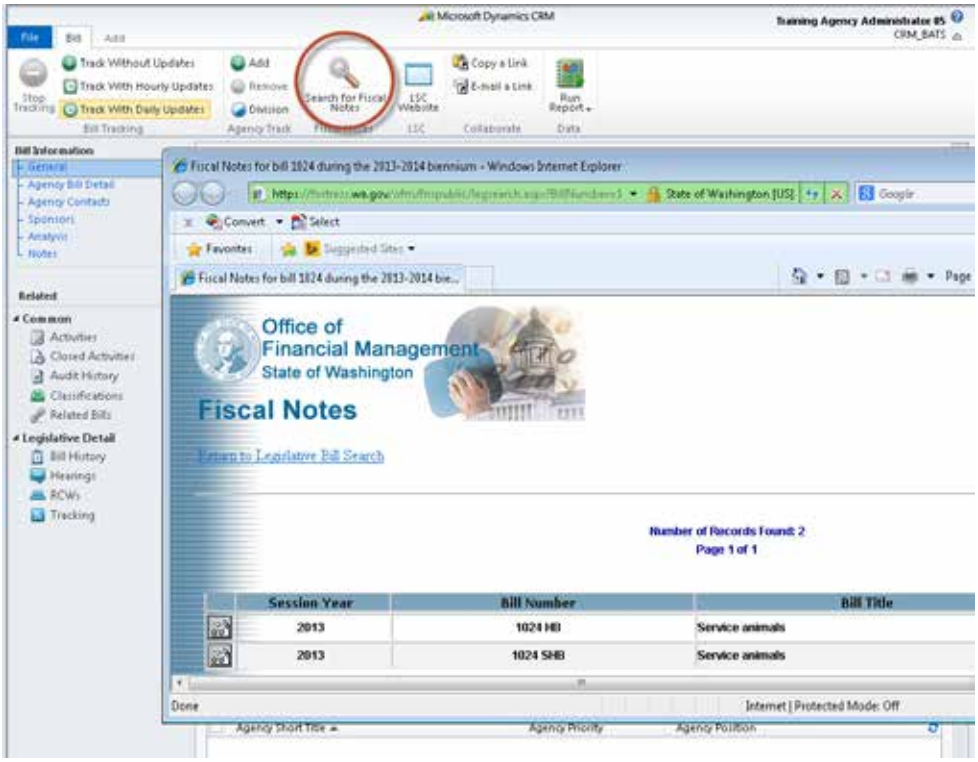


  - **The Bill Number will remain the same throughout the life of the bill**
  - **The Bill ID will change and display the most current version (See the Bill History screen for details on changed versions)**
  - **Session, Bill Short Title & Official Title**
  - **Bill Type, Companion Bill and Related Agency Request**

- **Click "LSC Website" in top Ribbon Bar to view webpage associated with this Bill**

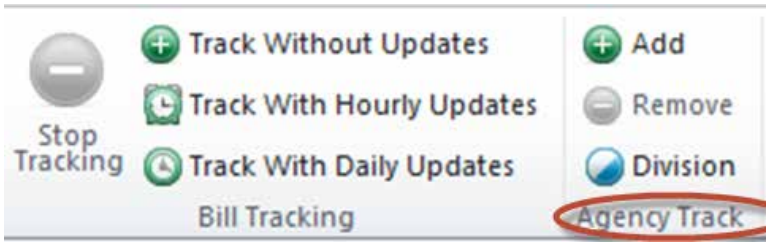


- **Click "Search for Fiscal Notes" in top Ribbon Bar to view the OFM Fiscal Notes site for Fiscal Notes associated with this Bill**

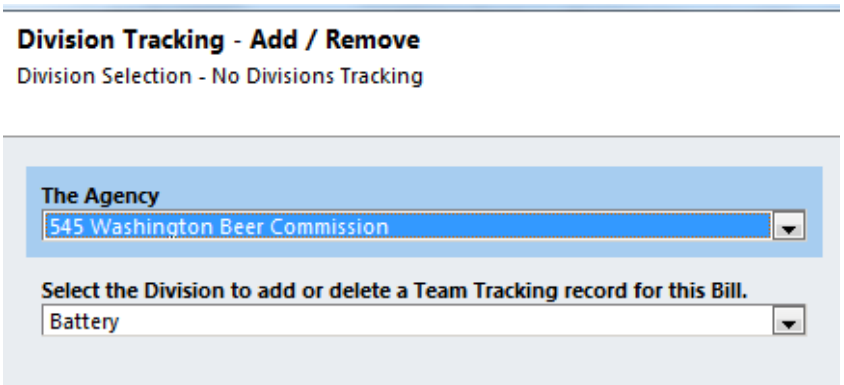


- **Bill Tracking options in top Ribbon Bar**
  - **Bill Tracking - Track for individual user (Based on Tracking Role assigned)**
    - **Select the Update Options you would like to track with**

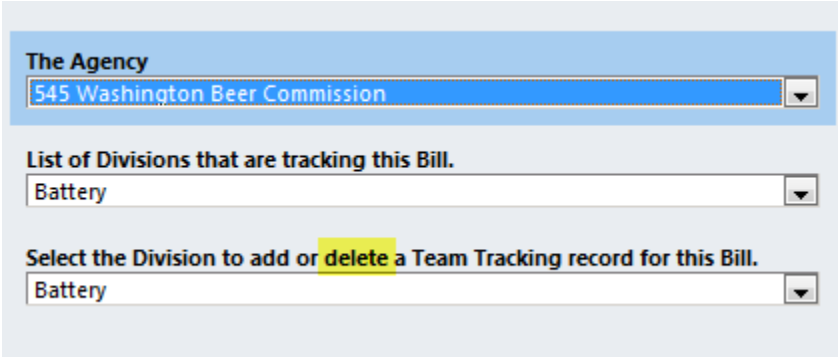
  - **Agency/Division Track- Tracking for Agency or Division (Based on Tracking Role assigned)**



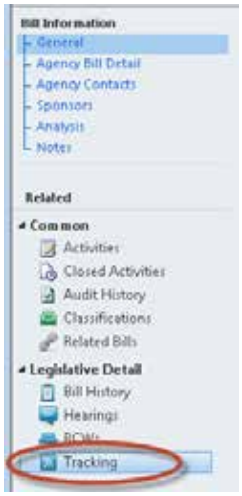
    - **To add tracking for a Division, click "Division" and complete wizard**



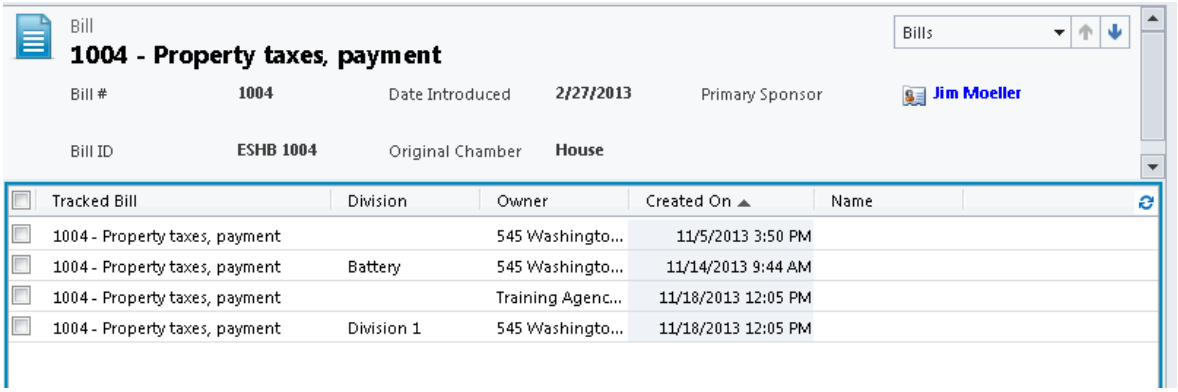
    - **To remove tracking for a Division, click "Division" and complete wizard**



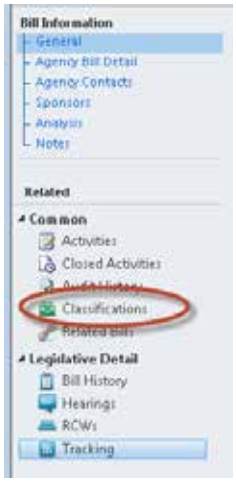
- **Click "Tracking" (Left Nav) to see who is tracking this specific bill (Admin and Coord Roles only)**



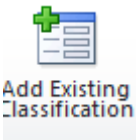
  - **Now you can view who is tracking this bill**



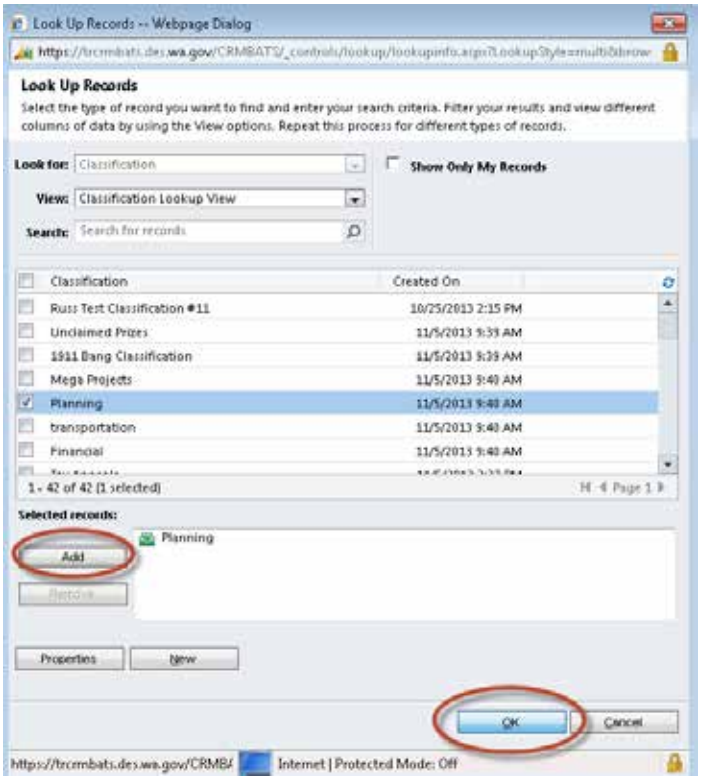
- **Click "Classifications" (Left Nav), to add this bill to an existing Classification**



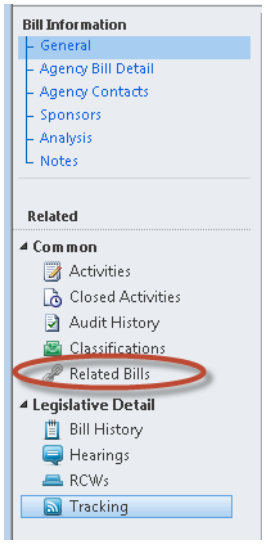
- **Click “Add Existing Classification” in top Ribbon Bar**



- **Select the Classification, click “Add” and “Ok”**

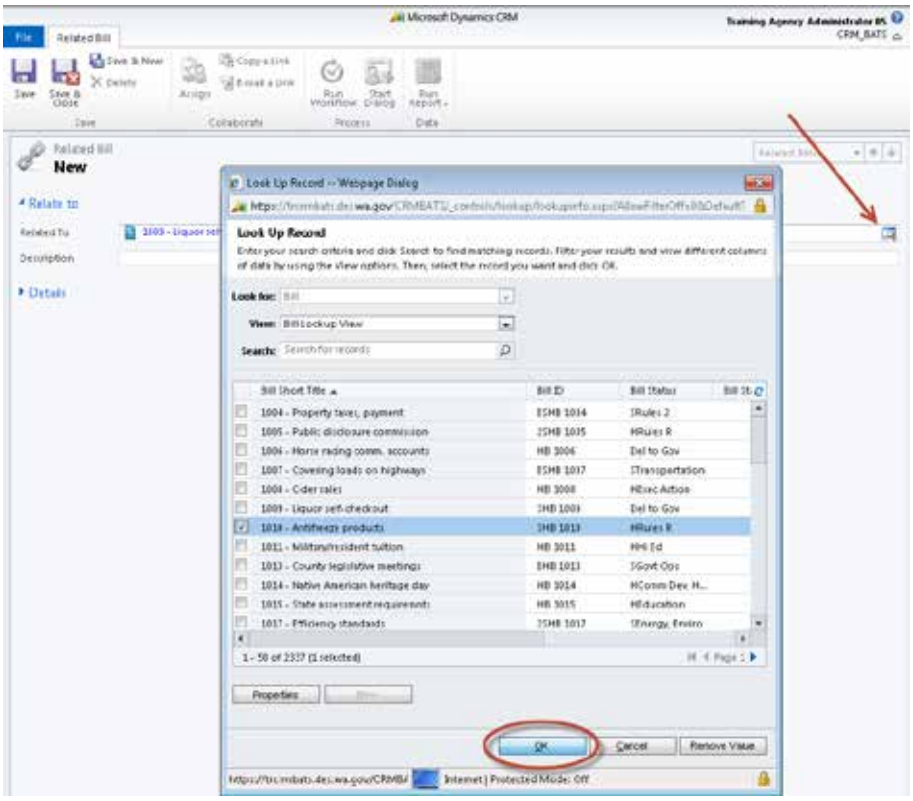


- **Click on “Related Bills” (Left Nav) to view existing Related Bills or add a new Related Bill**

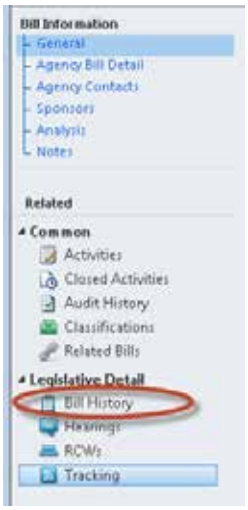


- **To add a new Related Bill, click in the box, and click "Add New Related Bill" in the top Ribbon Bar**

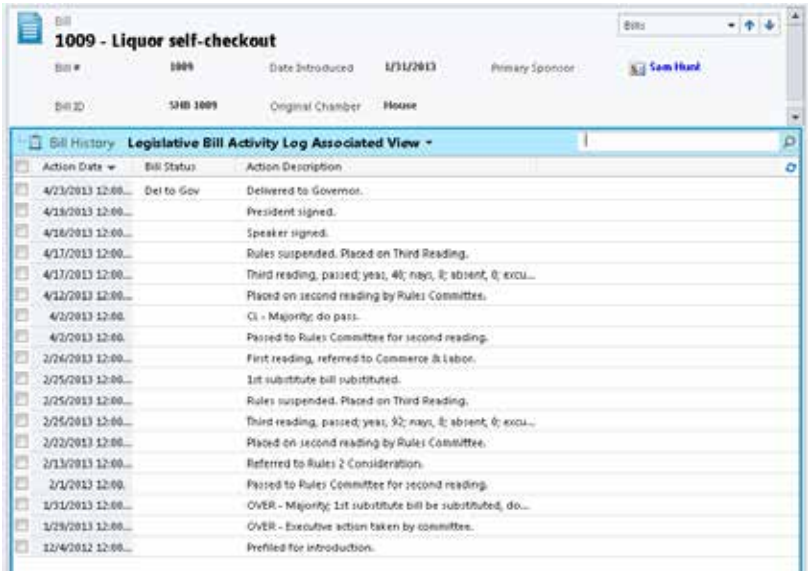
- **Click the lookup button, select the bill to relate and click "Ok"**



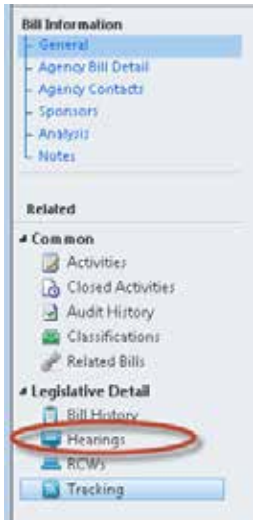
- **Click “Bill History” (Left Nav) for details on changed versions of the Bill**



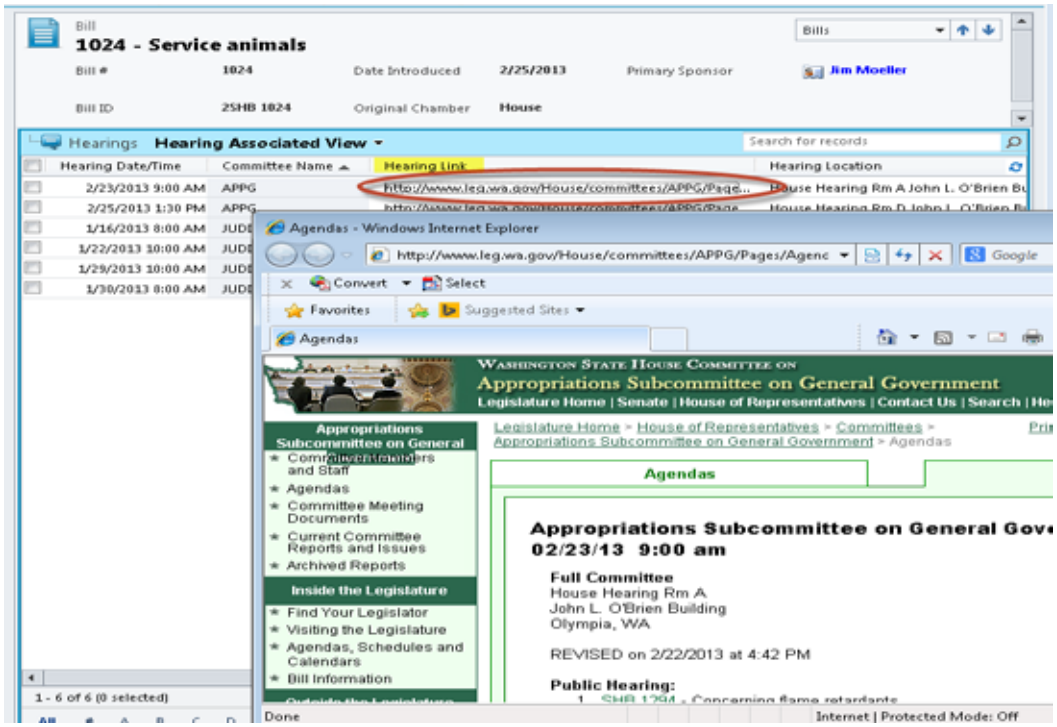
- **Now you can view the history of the bill**



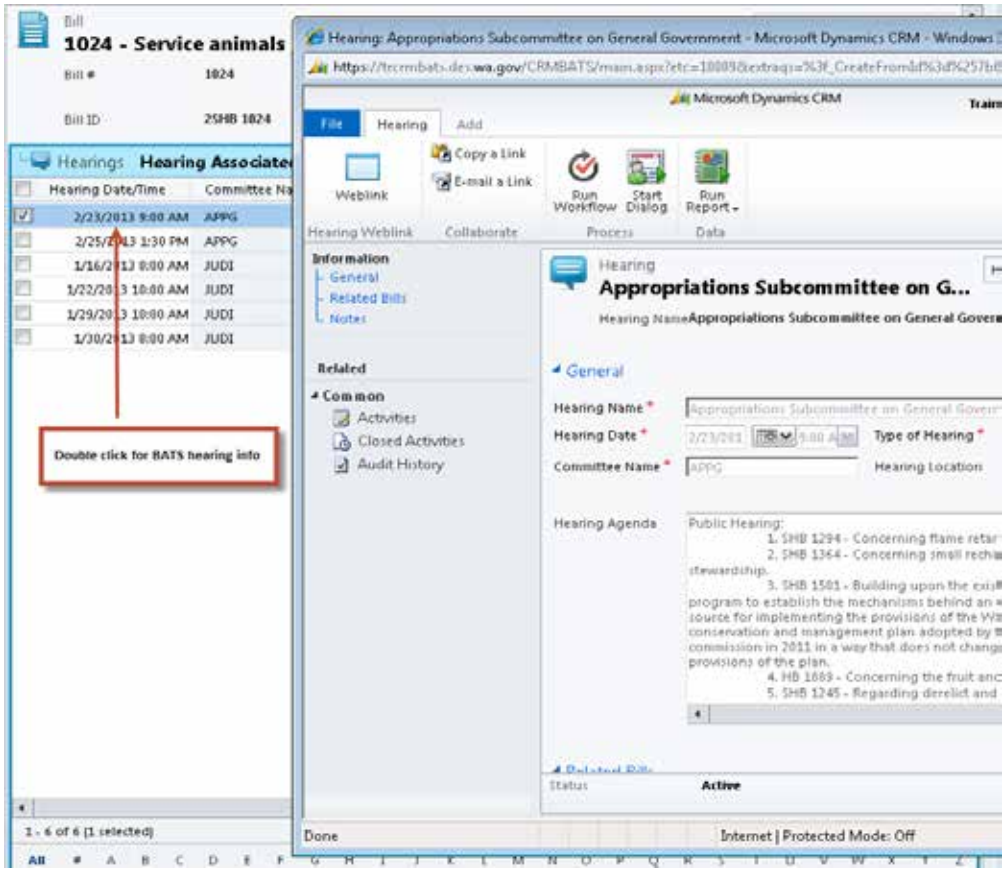
- **Click “Hearings” (Left Nav) for information on Hearings related to the Bill**



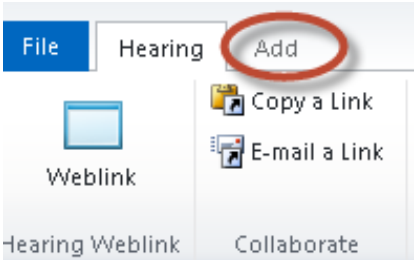
- **Click the Hearing hyperlink to open the LSC page for hearing details**



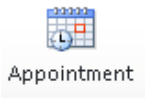
- **Double click on hearing to display BATS hearing page (do not click on the Hearing Link)**



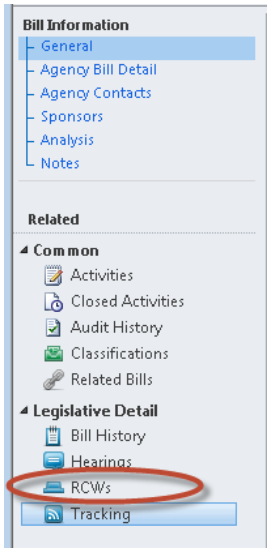
- **Click on "Add" Tab in your Ribbon Bar to add an Appointment for a hearing**



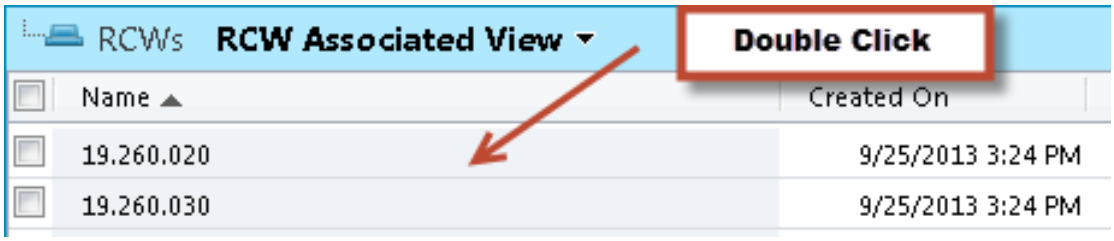
- **If appointment for a hearing changes, you will receive an email notification. However, this will not change the appointment on your calendar.**



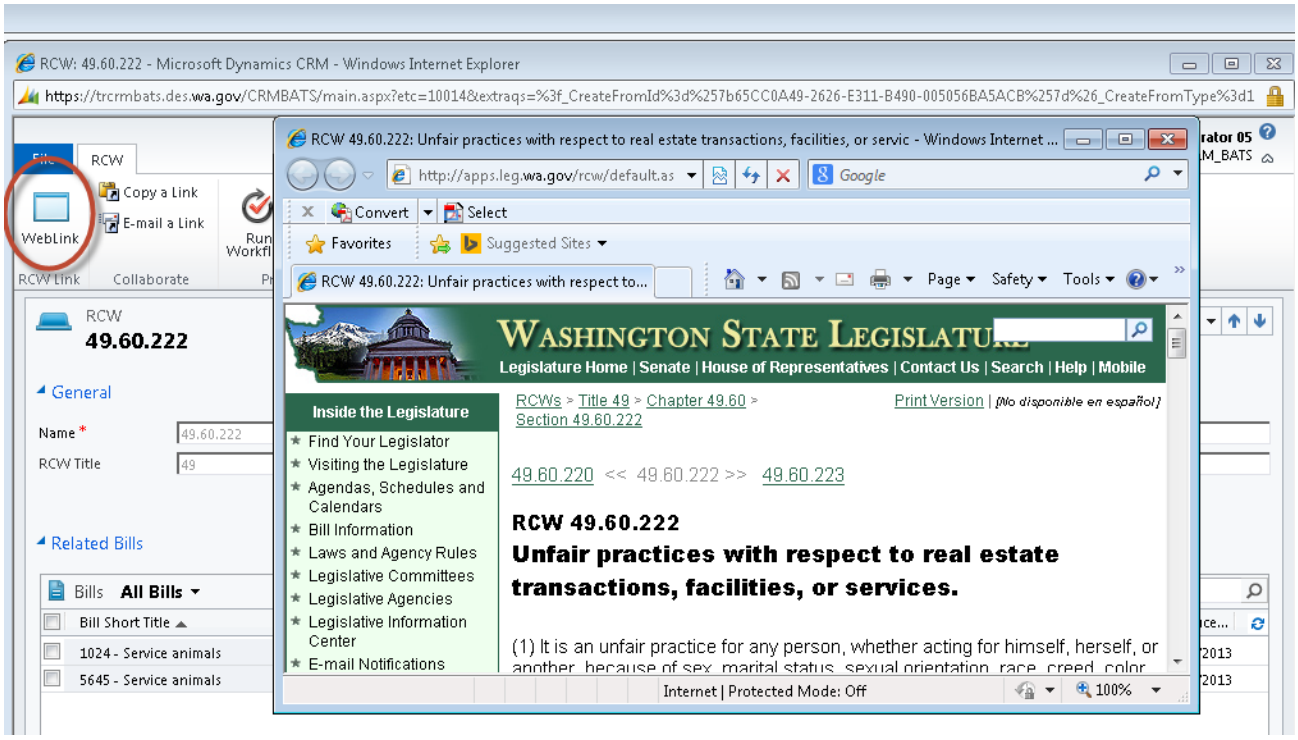
- **RCW's (Left Nav)**



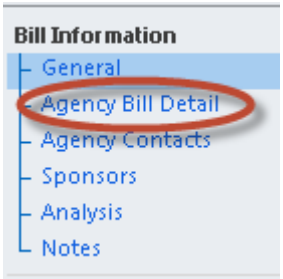
- **Double clicking on an RCW, will show all the RCW's associated with this bill**



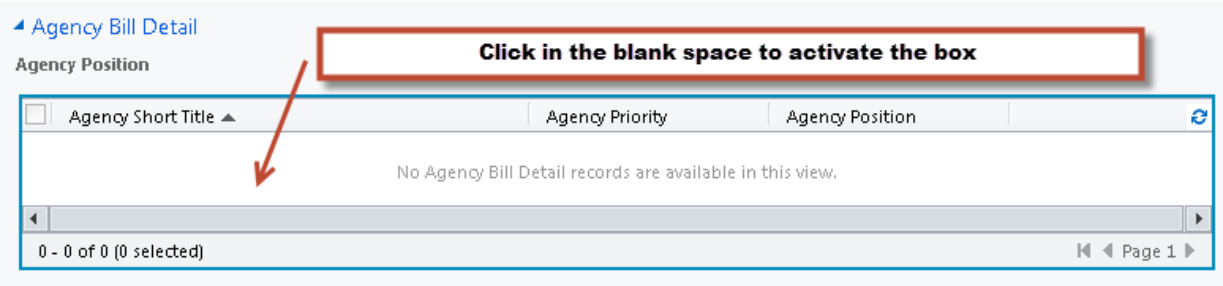
  - **Click the weblink in the top Ribbn Bar for RCW information**



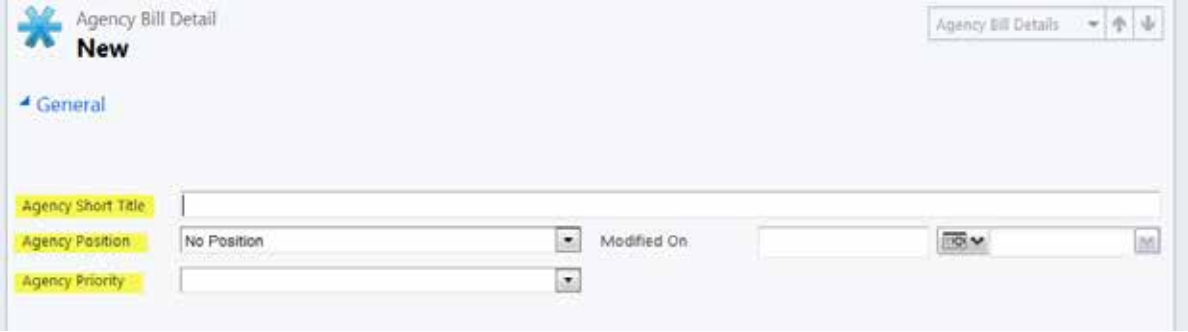
- **Click "Agency Bill Detail" for Agency Bill Details, including Agency Position**



- **Click in the "Agency Bill Detail" box to activate section**

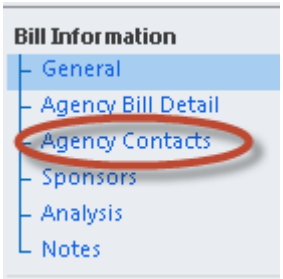


- **Click "Add New Agency Bill Detail" in the top Ribbon Bar**

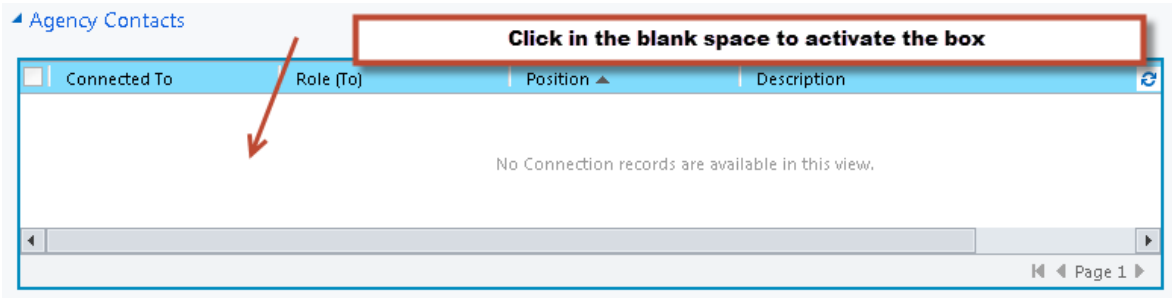


Tip You may want to come back to this part after your agency is done with the Analysis to update position and priority**

- **Agency Contacts**



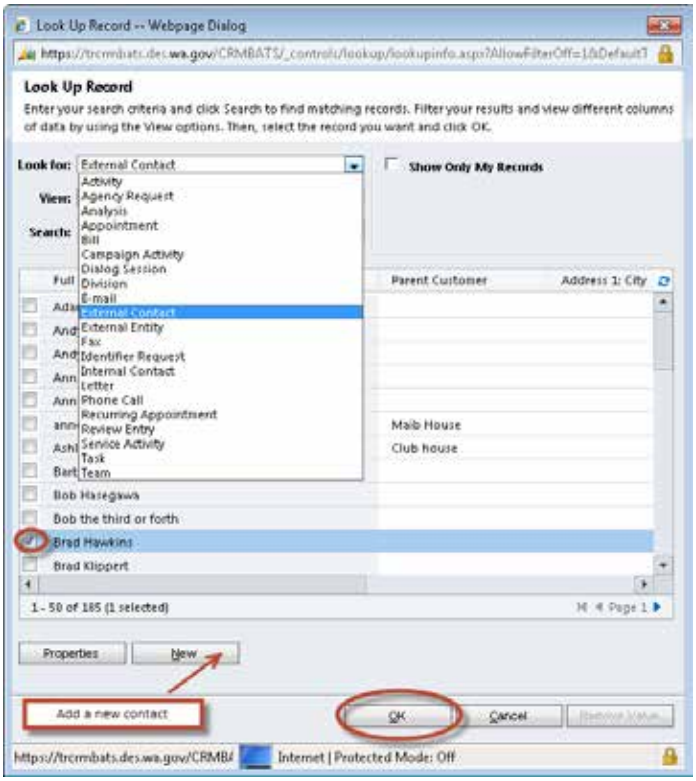
- **To add contacts to this bill, click in the Agency Contacts box to activate section**



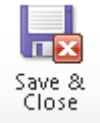
  - **Click "Connect" in the top Ribbon Bar**

  - **Search for the contact to be added and select the associated role**

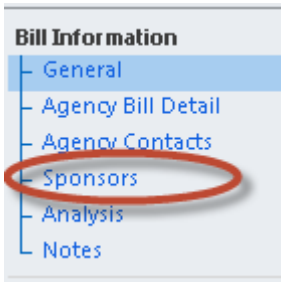
- **Select the drop down menu to change contact type (Internal Contact, External Contact or External Entity). Select the contact to add and click "Ok". Click "New" if contact does not already exist.**



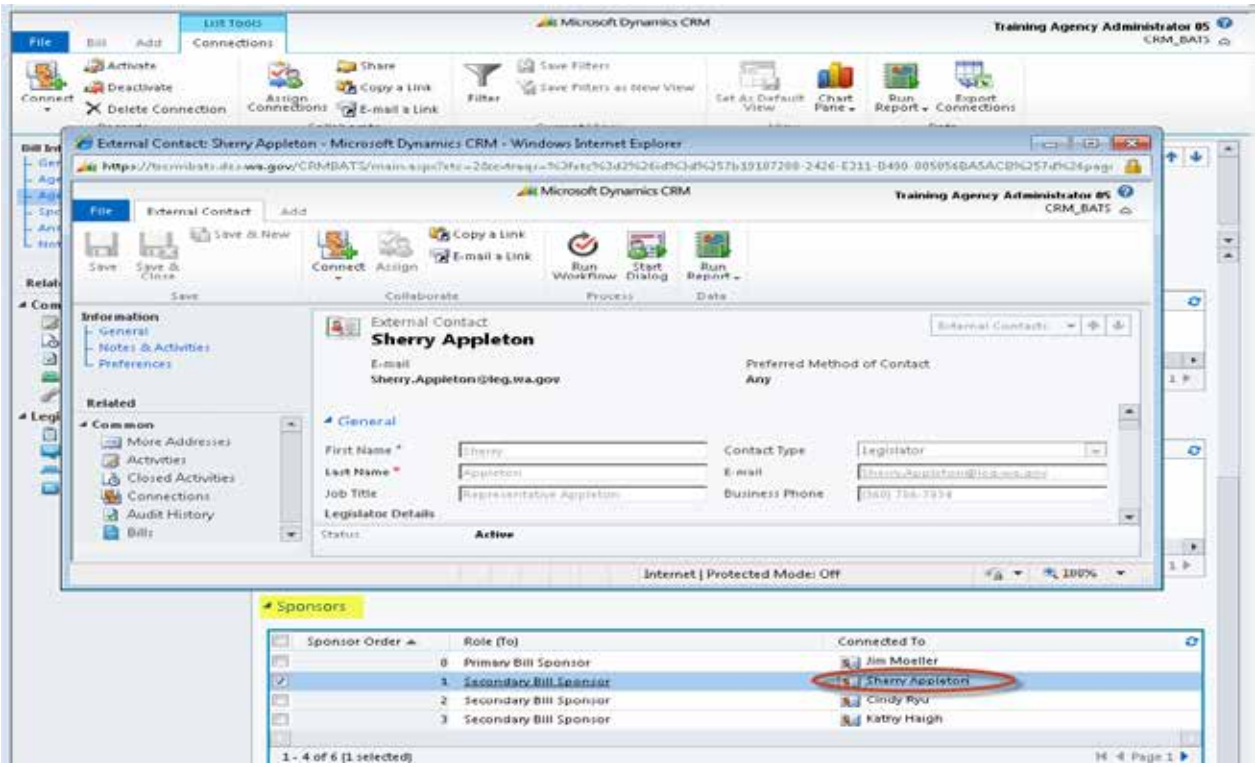
- **Click "Save & Close"**



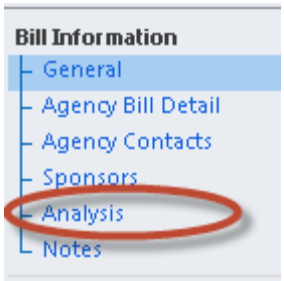
- **Sponsors are imported from LSC and cannot be changed**



- **Click on Sponsor name for BATS contact info**

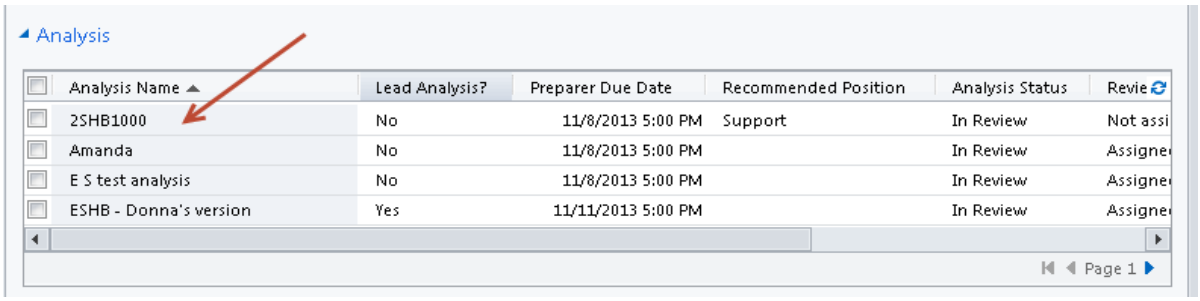


Create Analysis

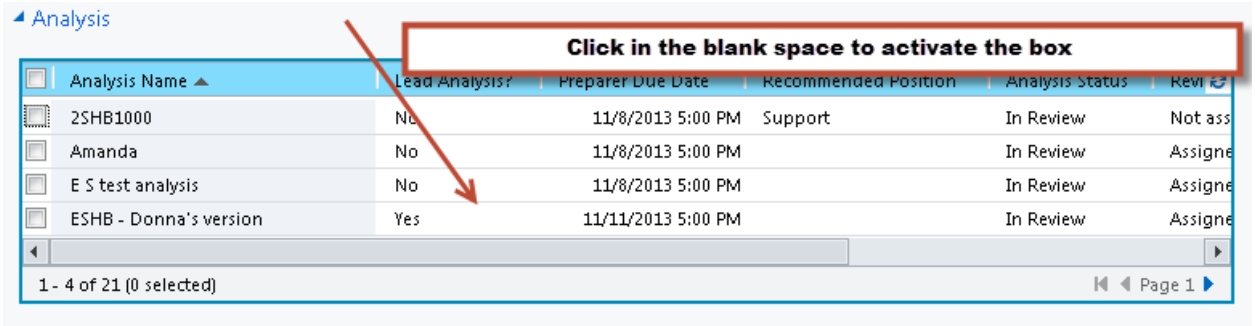


- **Click on "Analysis" (Left Nav), to view the existing Analysis or to add a new Analysis. To view an existing Analysis, click on the Analysis name.**

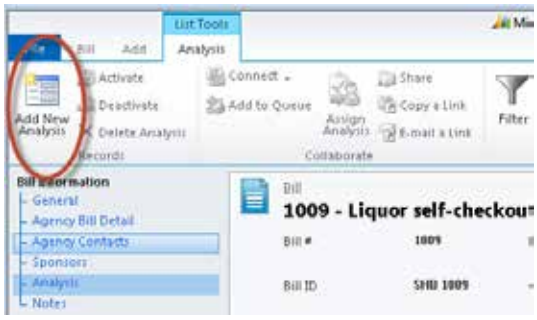
Tip Can have multiple Analysis on one Bill #**



- **To add a new Analysis, click in the box to activate section**



- **Click "Add New Analysis" in your top Ribbon Bar**

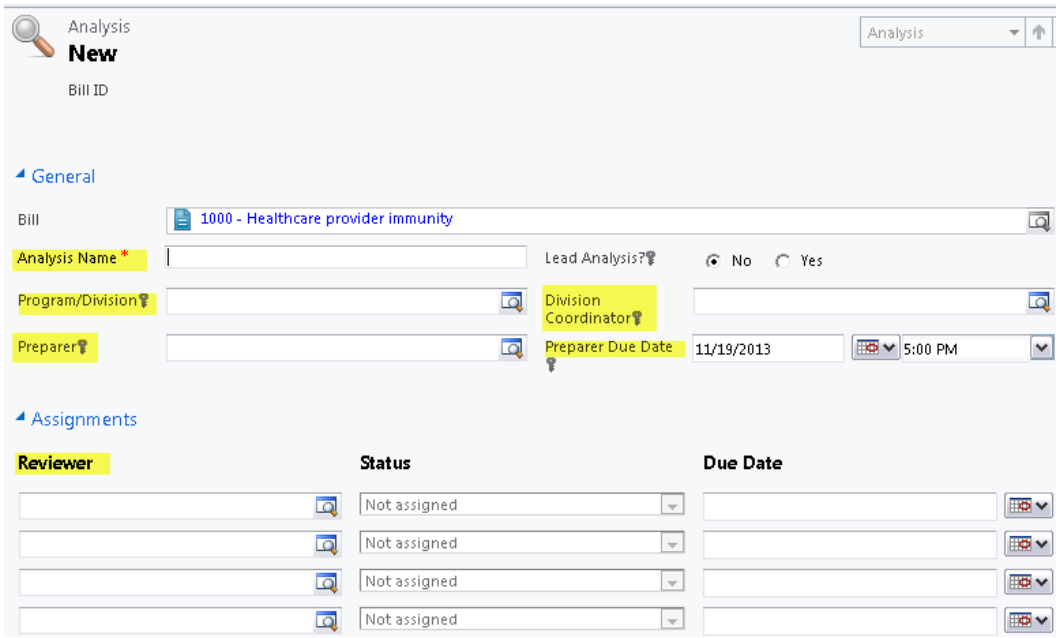


- **Assign the Analysis Name, Program and Division**

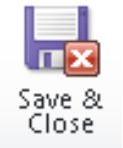
Tip Since the Bill # doesn't change, you might want to name your Analysis the version of the Bill. It will be up to your agency to come up with your own naming convention.**

- **Assign the Reviewers and Preparer**
  - **If your agency uses Division Coordinator, leave the Preparer blank and the Division Coordinator will get a task to assign a preparer**
  - **Enter a Due Date**

ü ***For training exercise, make yourself the preparer and first reviewer***

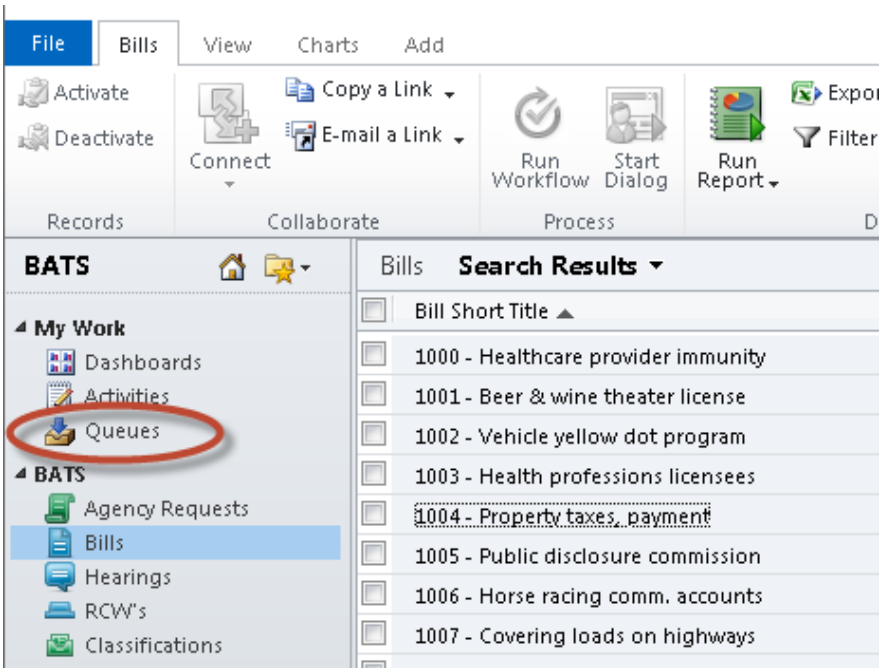


- **Click "Save & Close" in top Ribbon Bar**

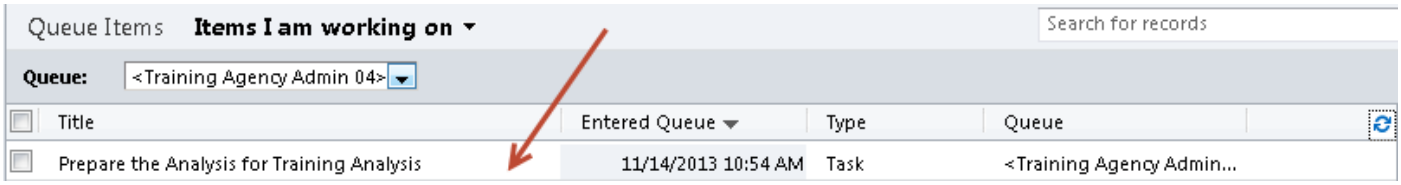


Prepare Analysis

- **Queues are used to create or manage actions (task or assignments) such as an agency preparing or reviewing Analysis**
  - **Click on Queues (Left Nav), this will show all the items in your queue**

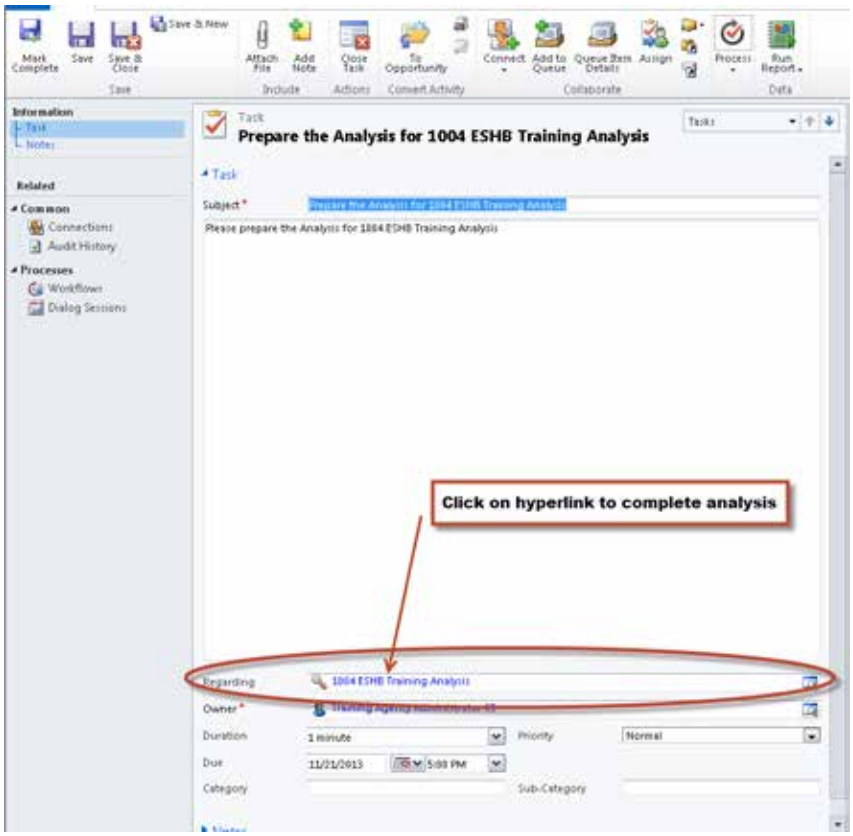


- **Click on the queue item, "Prepare Analysis"**

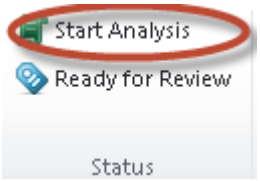


ü ***For training exercise, you are the preparer***

- **Click on the blue hyperlink "Regarding" to complete the Analysis**

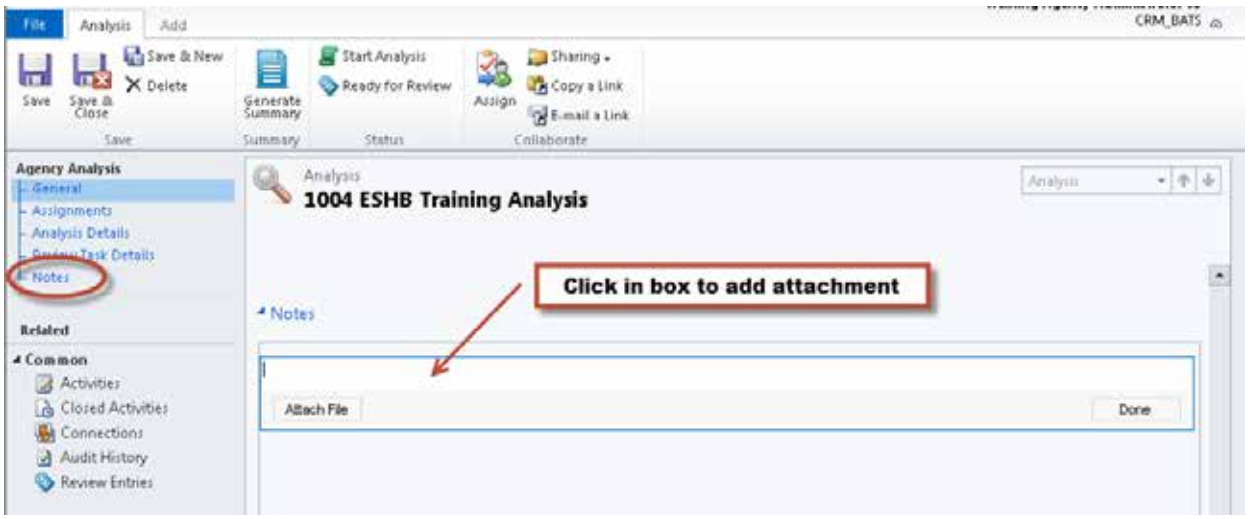


- **Click "Start Analysis" in the top Ribbon Bar**



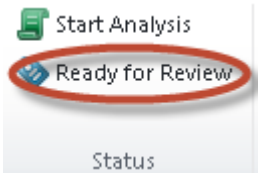
- **Complete the Bill Analysis Wizard**

- **Click "Notes" to add attachments or notes. Click in the "Notes box" to activate box to add a note or attach files.**

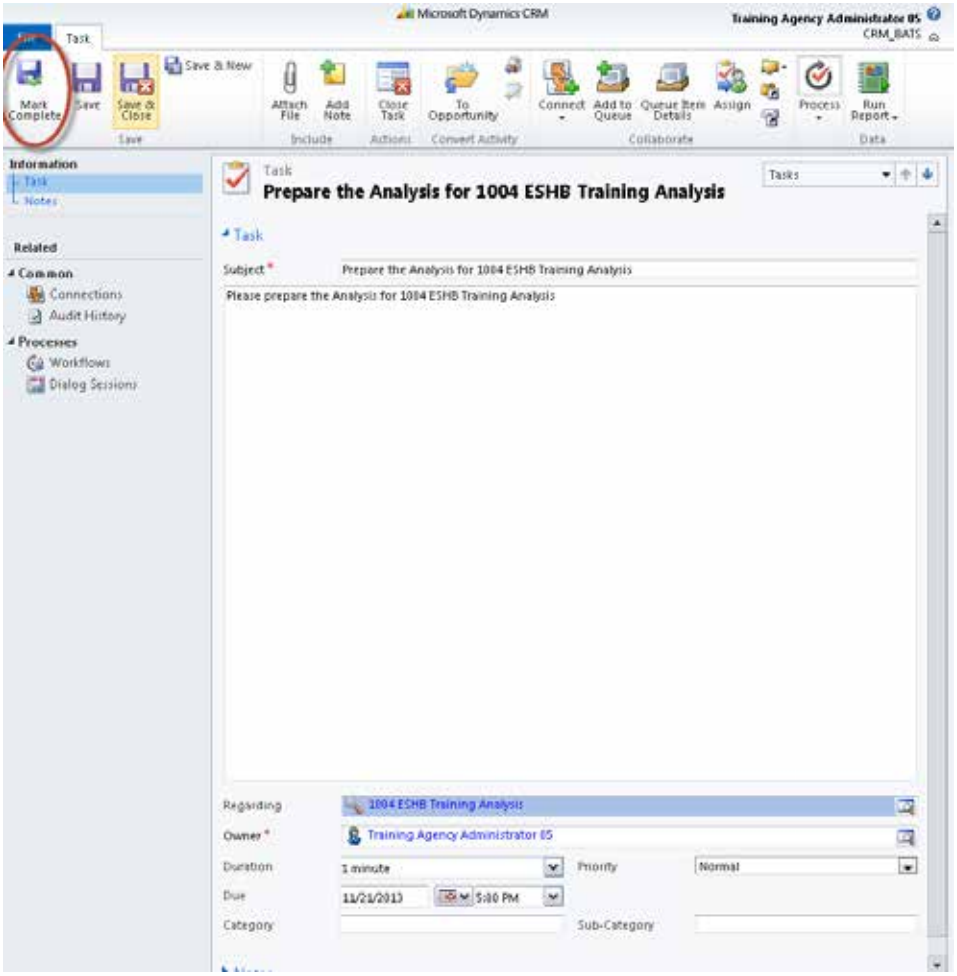


- **Click "Generate Summary" in top Ribbon Bar to verify Analysis**

- **Click "Ready for Review" in top Ribbon Bar to assign Analysis review to first reviewer**

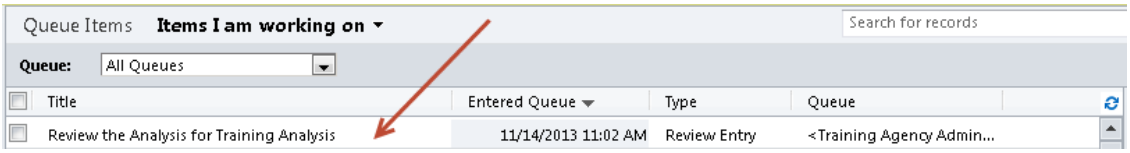


- **Mark your task complete**



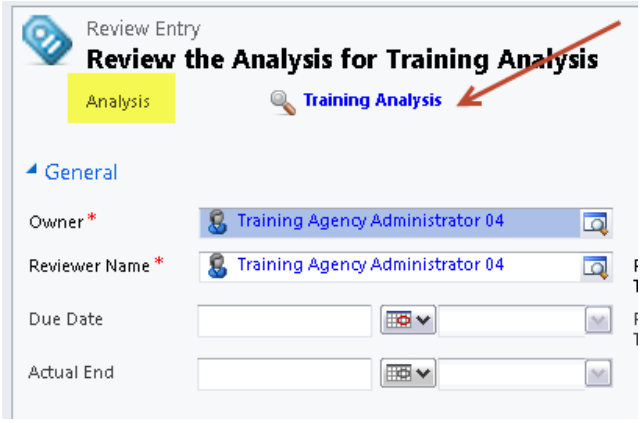
Review Analysis

- **From the Queue, click the queue item for "Review the Analysis"**

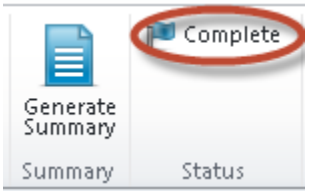


ü ***For training exercise, you are the final reviewer***

- **Click on the "blue hyperlink" (Analysis name) to review**



- **Review the Analysis and once reviewed, click the "Mark Complete" flag in top Ribbon Bar (Only visible to final reviewer)**



Tip Once the Complete button is marked, no changes can be made to the Analysis**

- **Click "Mark Complete" on your review entry in the top Ribbon Bar**

Tip If there are multiple reviewers, the next reviewer will receive a task in their queue to review the Analysis. The reviewer needs to save and close the Analysis, but MARK TASK COMPLETE, to push to the next reviewer. Only the final reviewer will have a "Complete" flag in the Analysis (as shown above).**

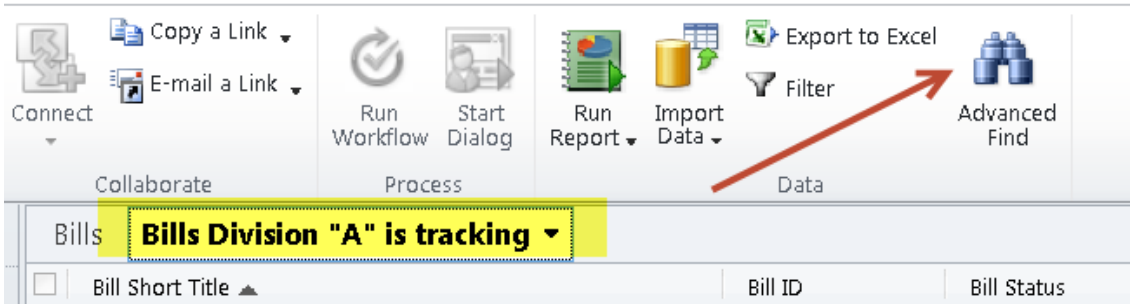
ü ***For training exercise, you are the final reviewer***

Advanced Find

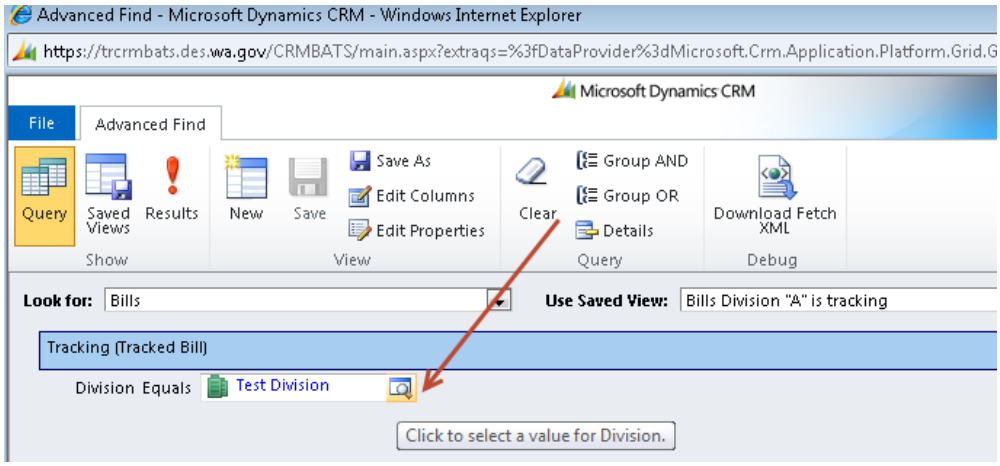
- **Advanced Find may be used to search for records, activities, or saved views across fields and pages**
- **Advanced Find is available on some of the pages**
- **Advanced Find icon is located on the top Ribbon Bar**
- **Results may be saved as a "view" (personal view) to be used on some of the pages**

Informational YouTube Video Link - http://www.youtube.com/watch?v=5ogrbdj_vfw

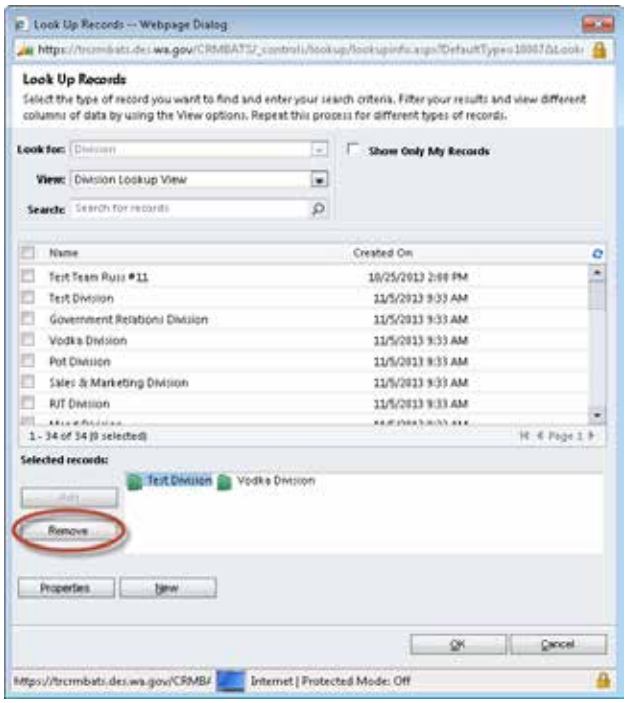
- **Select an existing view that is similar to the results you are looking for**
  - ü **For training, use the view "Bills Division A is Tracking"**
- **Click on the "Advanced Find" Button**



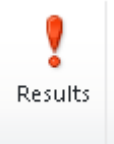
- **Select the lookup icon to find the Division you want to display in your view**



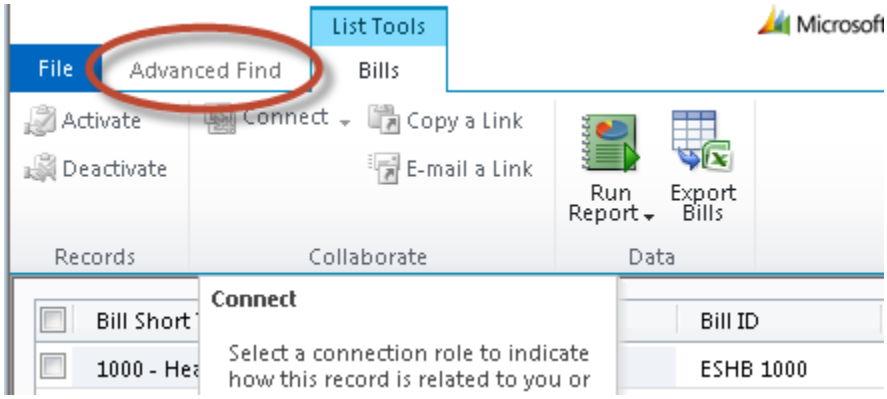
- **Double click the Division you want to add**
- **In the selected records box, click on the exisiting division to remove and click “Remove”**
- **Click “Ok”**



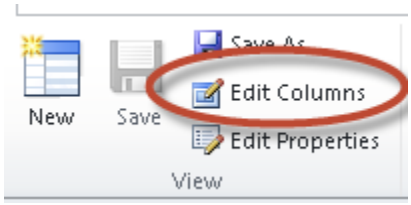
- **Click on the “Results” Icon in the top Ribbon Bar to view**



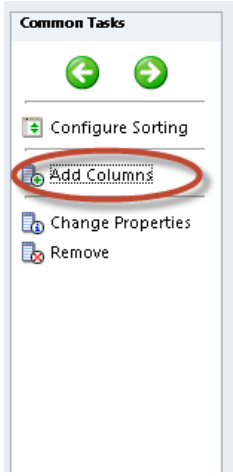
- **After you viewed the results, toggle back to the Advanced Find tab in your top Ribbon Bar**



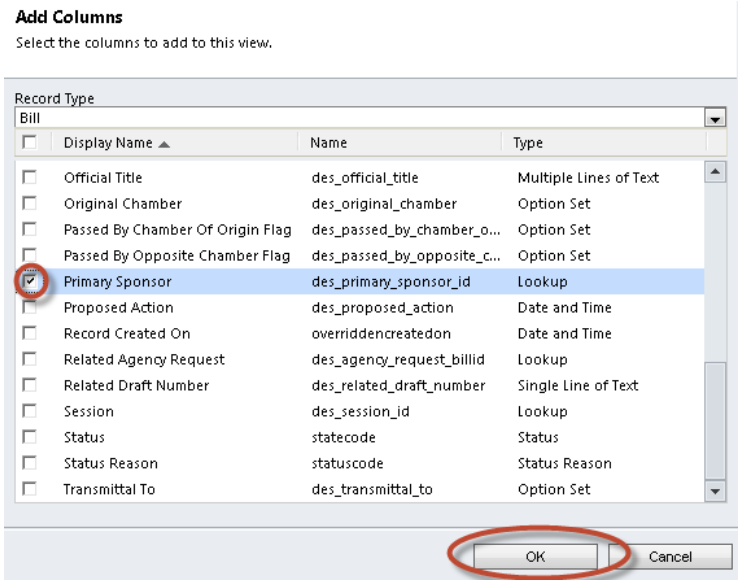
- **Click on the "Edit Columns" icon to format columns**



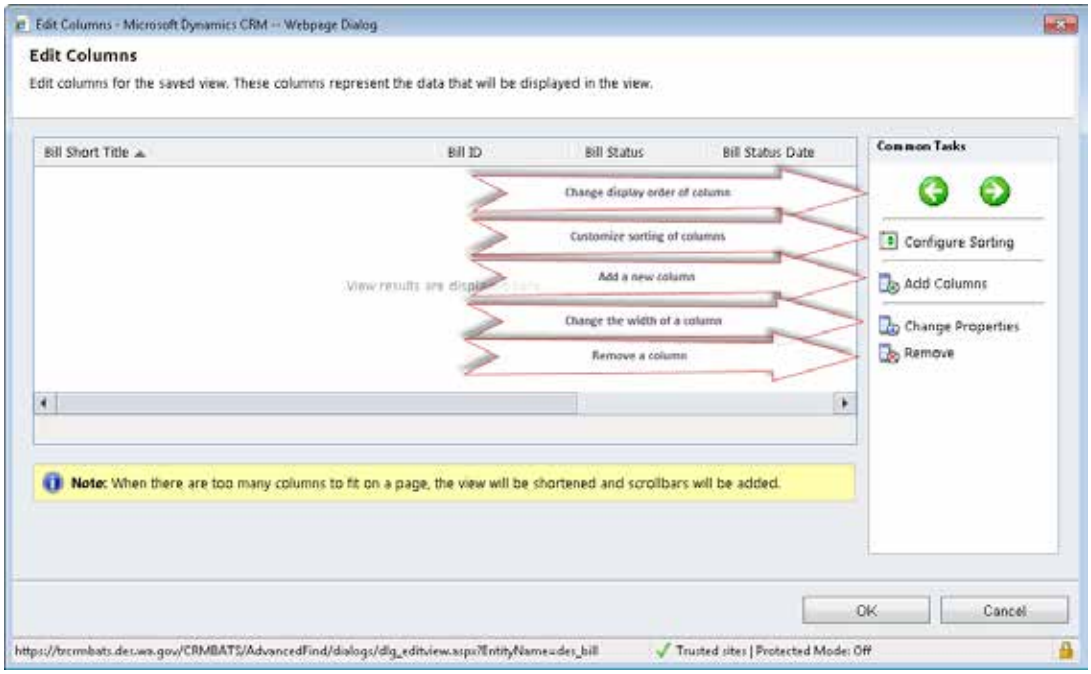
- **Click on the "Add Columns" button to add additional columns**



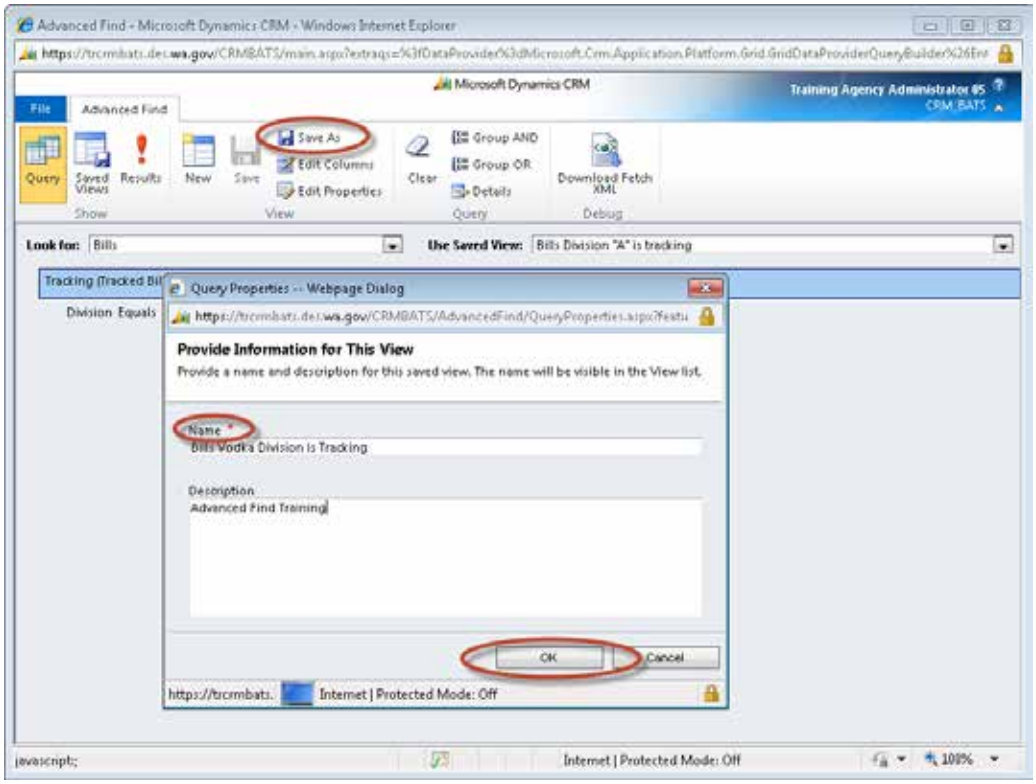
- **Select the column you want to add and click "Ok"**



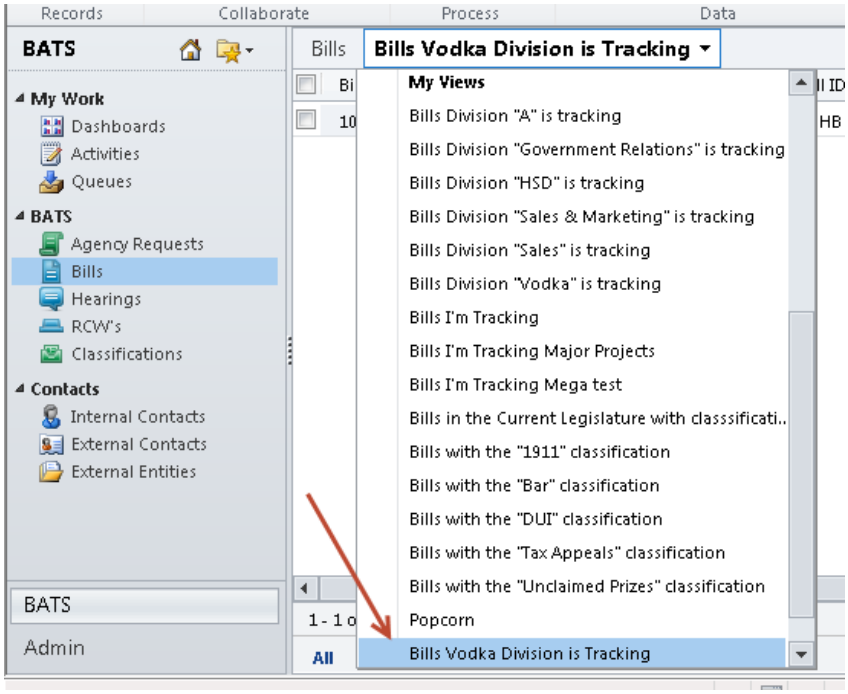
- **Additional column options**



- **Click "Save As" to save and re-name your Advanced Find (Custom View) click "Ok"**

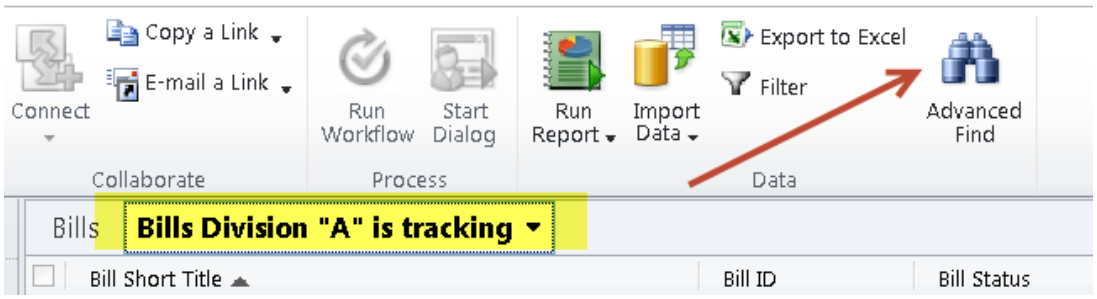


- **Close the Advanced Find window and click "Bill's" in the left nav. In your views dropdown menu you will now see your saved Custom View under my views.**

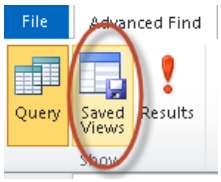


Share a Personal View

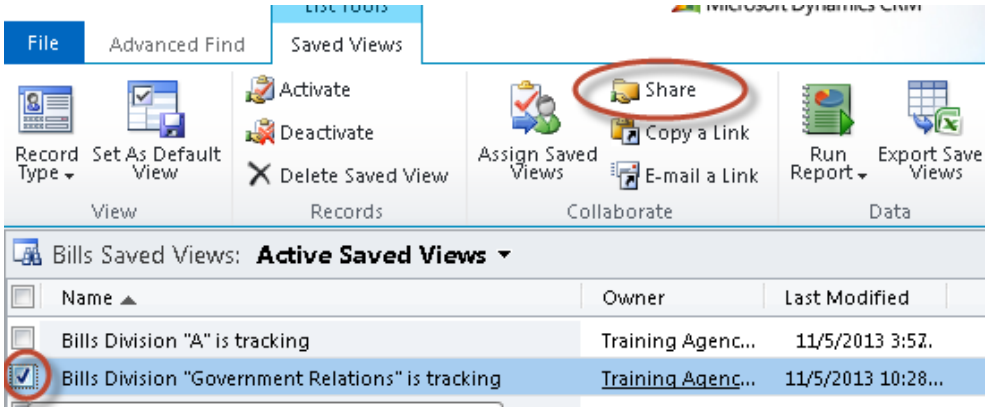
- **Click on the "Advanced Find" button in the top Ribbon Bar**



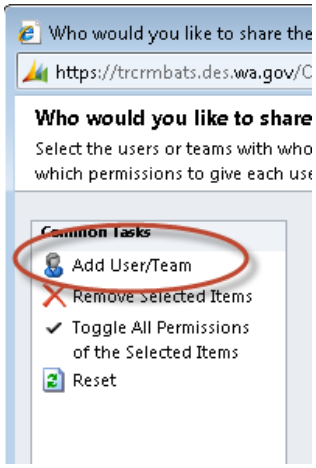
- **Select "Saved Views" in the top Ribbon Bar to display existing Custom Views**

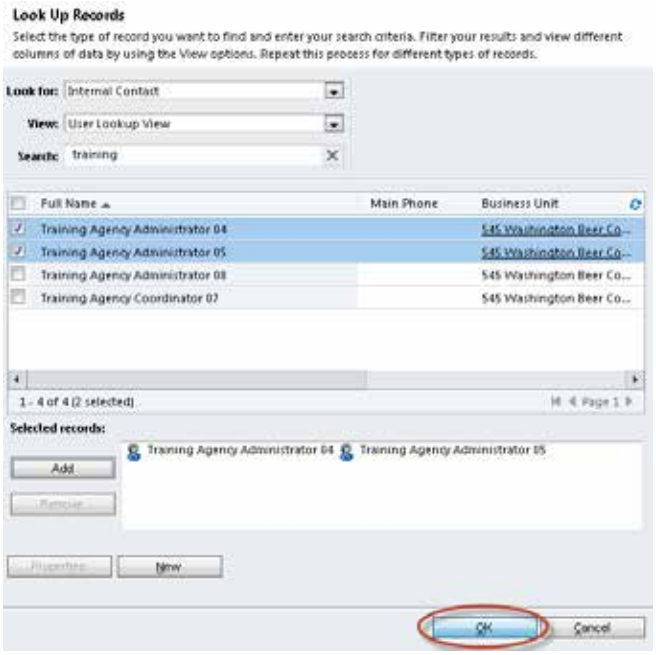


- **Check the box next to the view you want to share and click "Share"**



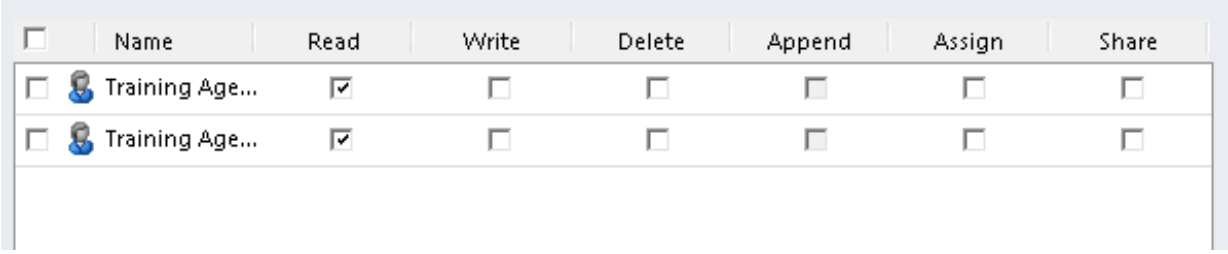
- **Select the team/user you want to share with. Select the users to share with, click "add" and click "Ok"**



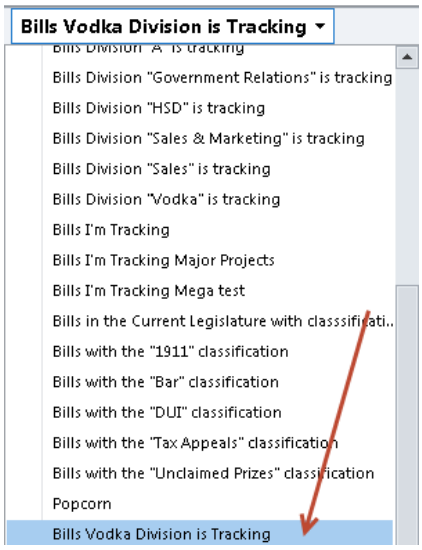


- **Select the view permissions for each user or team**

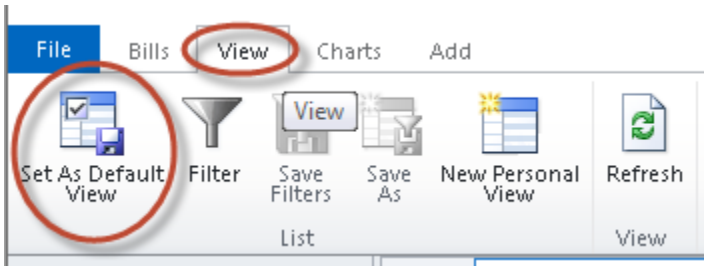
Tip If you give a user the right to delete, append or write, they will have ability to change the view for everyone who is using that view.**



- **This view will now be available for those users under My Views**



Tip If the user would like this view to be their default view, they need to click on the "View" tab on the ribbon bar and "Set As Default View".**



Dashboards

- Dashboards provide the user with quick access to information or common tasks
- 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 charts
- May contain a list that uses system views and personal (saved) views

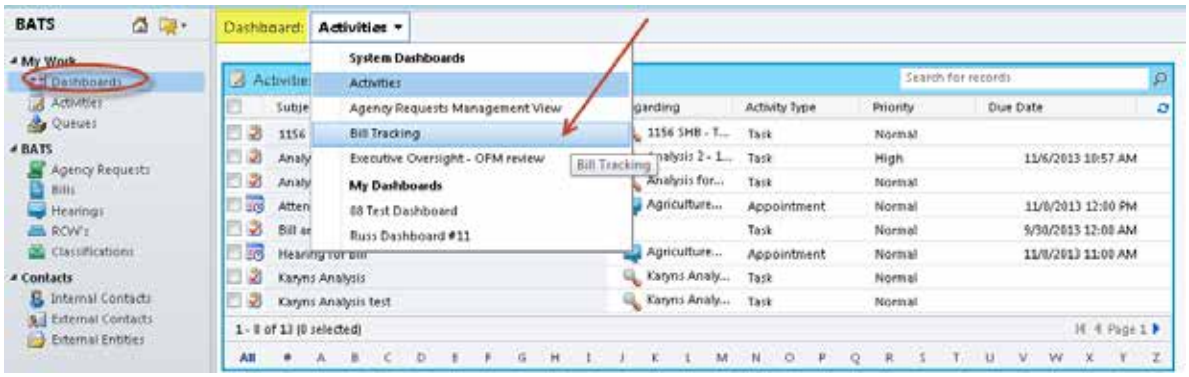
YouTube Video Link - http://www.youtube.com/watch?v=RriGGfypMOM

Creating a Dashboard from Scratch - Option 1

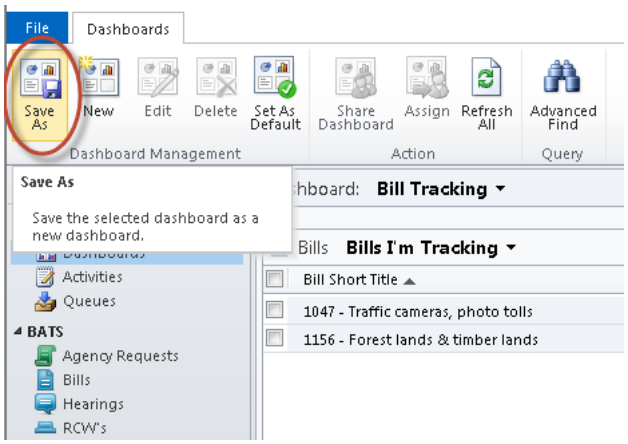
- **Instructions are located in your handouts or** http://www.des.wa.gov/services/IT/SystemSupport/Training/Pages/trainingCourseMaterials.aspx
  - ü ***For training exercise we will customize an existing dashboard (Option 2)***

Customizing an existing Dashboard - Option 2

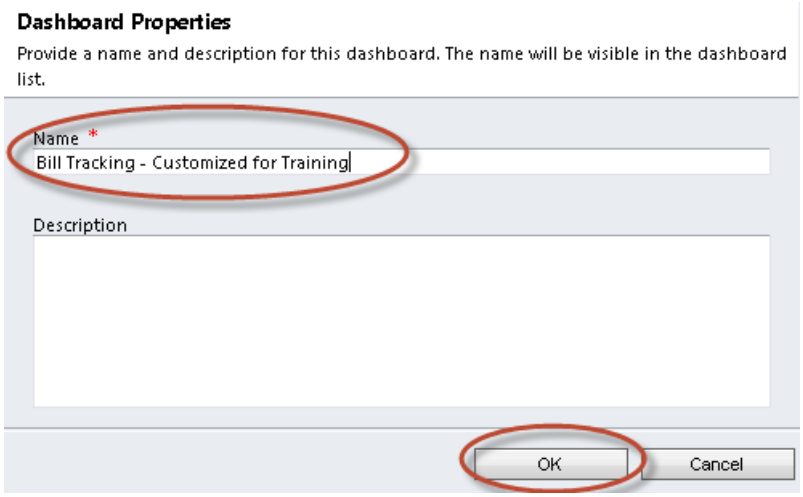
- **Select the "Bill Tracking" Dashboard**



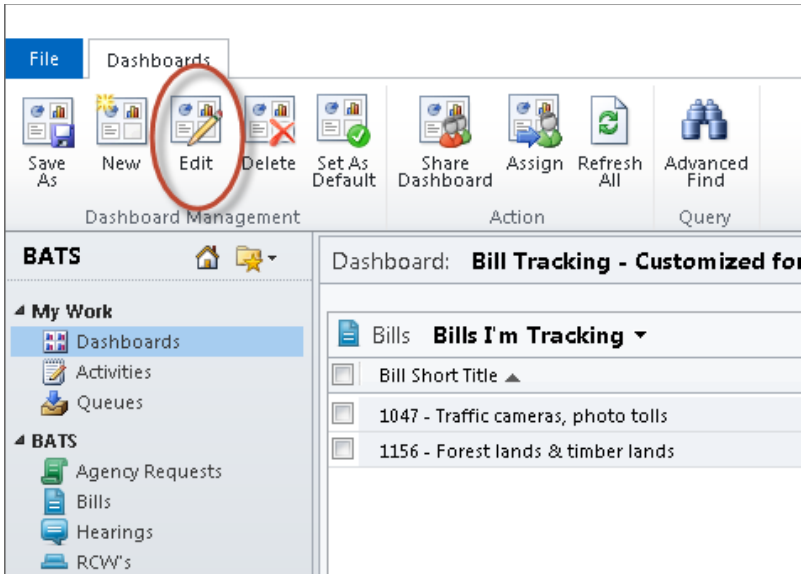
- **Click on the "Save As" button located in your top Ribbon Bar**



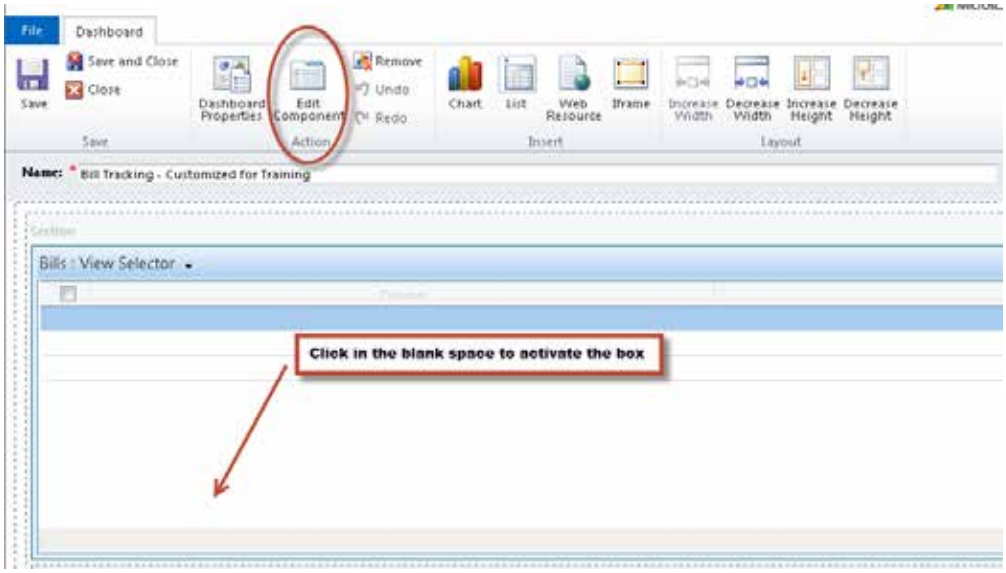
- **Name your Dashboard and click "Ok"**



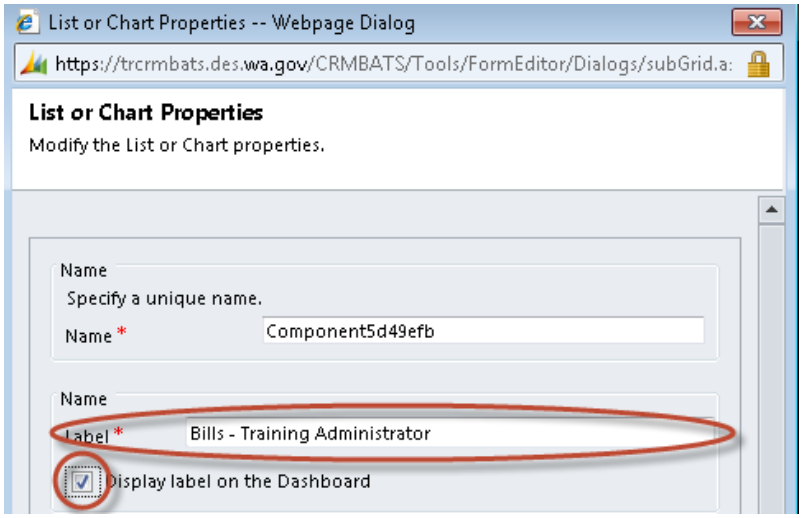
- **Click the "Edit" button located in your top Ribbon Bar**



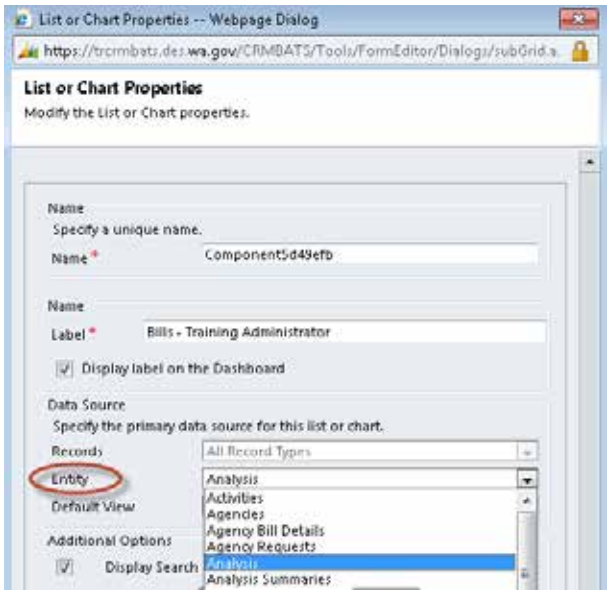
- **Click on the Component (list, view or graph) you want to customize and click "Edit Component" in top Ribbon Bar**



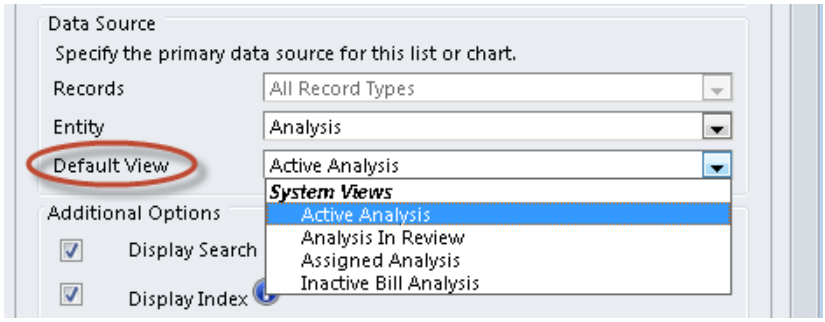
- **Change the name of the Label for this component to display in the component header**
- **Check the box "Display label on the Dashboard" to display the name**



- **Select the Entity from the drop down menu that you want to display**

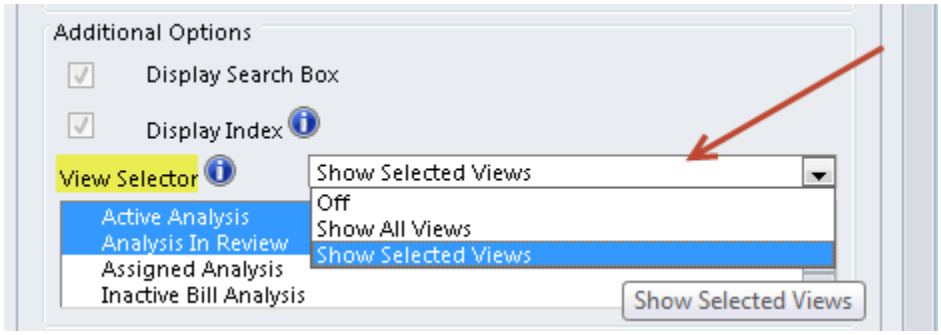


- **Select the Default View from the drop down list**

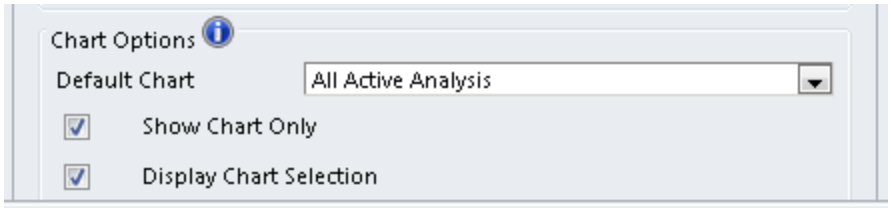


- **Select the additional views you would like to have available for this entity**

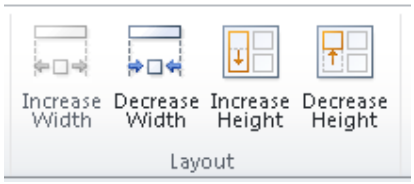
Tip From the View Selector drop down list you can choose "Show Selected Views" to choose multiple views. Use the "Ctrl" key to select multiple views under the View Selector or Show All Views.**



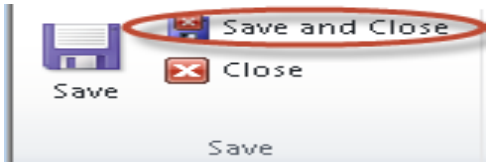
- **To display a Chart/Graph select “Show Chart Only”**
- **To select a Chart/Graph different from the default view, select “Display Chart Selection”**

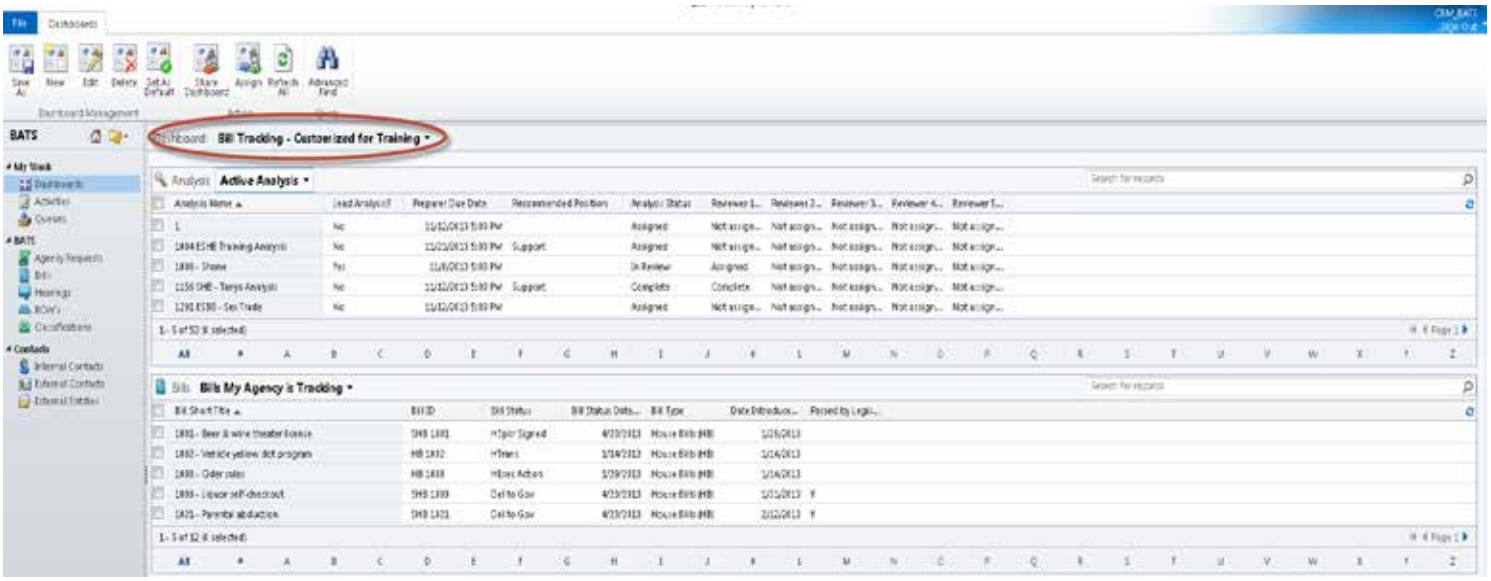


- **You can change the size of a component by activating the component and using the buttons in your top Ribbon Bar**

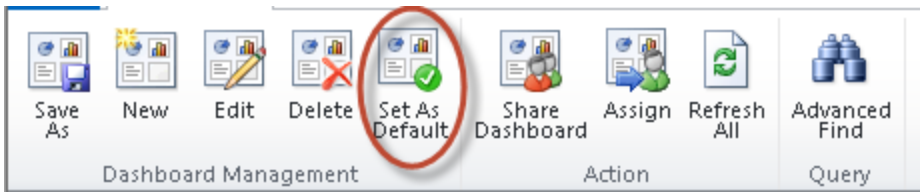


- **After all the components have been updated, click “Save & Close”**

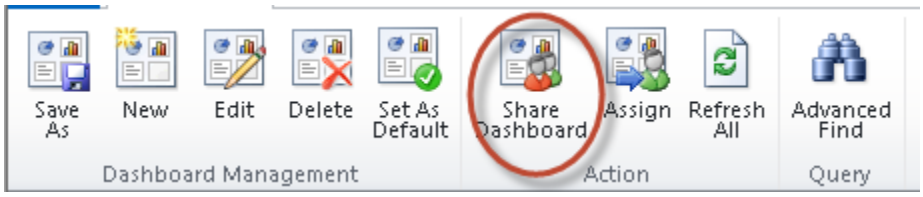




- **You can set this custom dashboard as your default view by clicking "Set As Default"**



- **You can share this custom dashboard to another user by clicking "Share Dashboard"**



Hearing Report

- The Hearing Report is available from either your **Bills Page** or **Hearings Page** (Left Nav as below).
- The Report displays a list of future Hearings (including today's date) that are associated with Bills from a list from within your view.
    - A hearing prior to today's date will not be displayed.
    - A hearing that is not associated with a bill will not be displayed.
- The system view, "Hearings Next Week for Bills My Agency is Tracking", is available in your views list to limit which Hearings you view. This view specifically searches for Hearings, scheduled in the coming week, against Bills your agency is tracking.

    - Select "Hearings" (or Bills) in the Left Nav
        - § Change your view to "Hearings Next Week for Bills My Agency is Tracking"

- Because the Report runs from data in your view, the results of the Hearing Report relates to the selected view you are using. You will need to create different custom views to display different Hearing Report results.

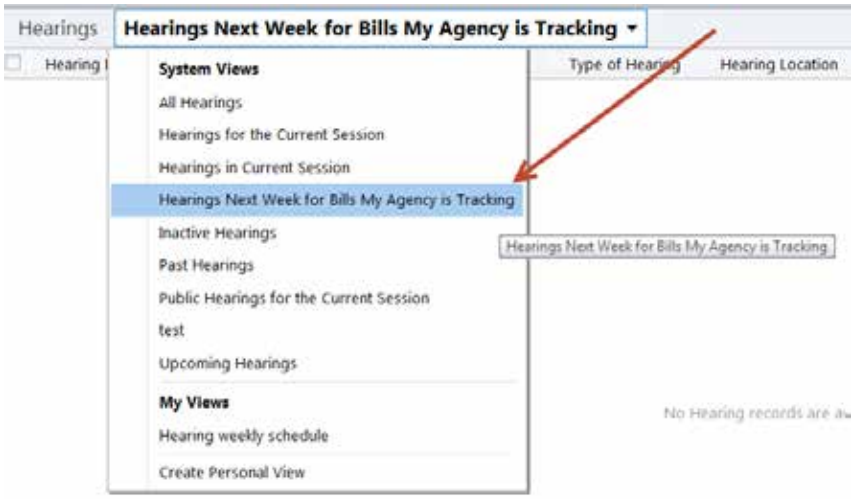
Tip** To create a Custom View, you can start by using the System View, Hearings Next Week for Bills My Agency is Tracking and clicking "Advanced Find". See page 42 for instructions on creating Custom Views.

For example: The "Hearings Next Week for Bills My Agency is Tracking" system view specifically searches for Hearings, scheduled in the coming week, against Bills your agency is tracking. If you want to modify this view to display Hearings in the next month, you can do so via the "Advanced Find" option and save your new view.

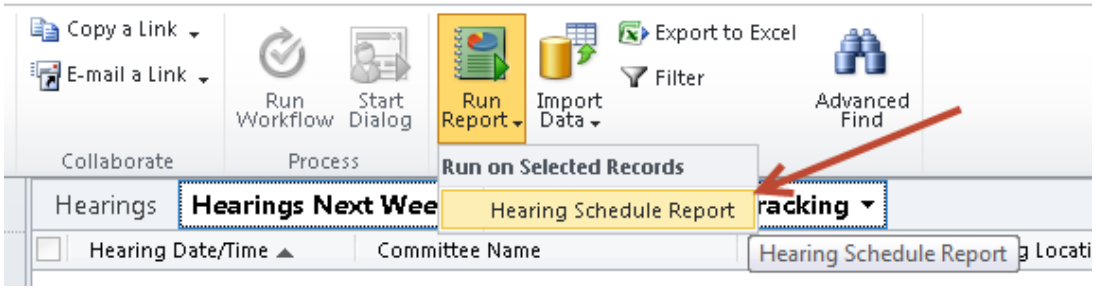
- The Hearing Report can be exported to an Excel spreadsheet if you would like to include further information.

Running the "Hearing Report"

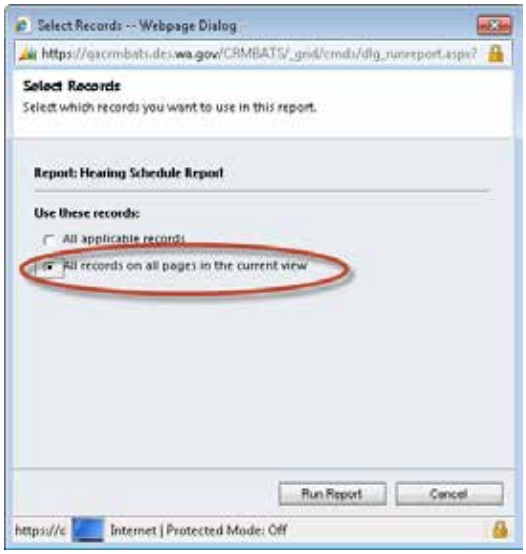
- Click on either **Bills** or **Hearings Page** in your Left Nav.
- Select the view "Hearings Next Week for Bills My Agency is Tracking" or any custom view you have created.



- Select "Hearing Schedule Report" from the Run Report drop down in your top Ribbon Bar.

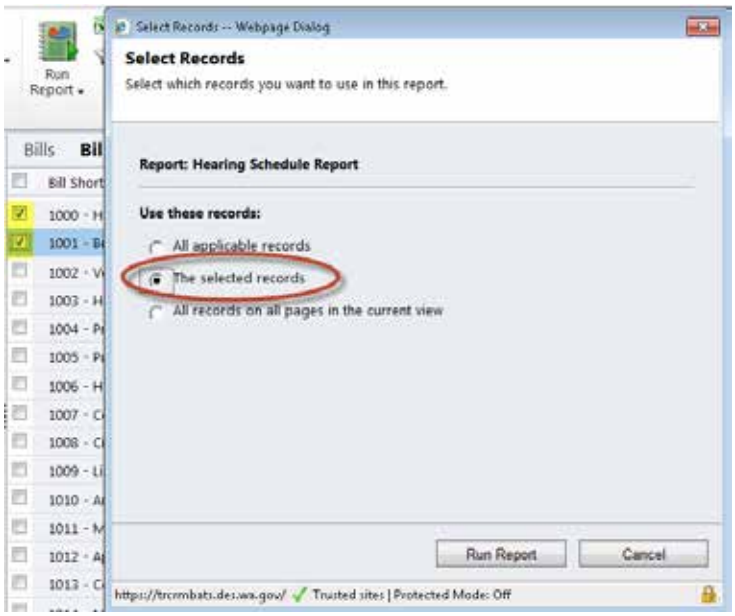


- Select "All records on all pages in the current view" to have the report display the records displayed by your view.



WARNING** The Hearing Report will default to “All applicable records”. If you leave this criteria selected it will display all records with a future hearing regardless of the view you have selected.

- If you want to limit the data even further, select specific bills or hearings from the view and run the hearing report on the selected bills only.



REPORT EXAMPLE:

Future Hearing Schedule Report

Time	Bill ID	Title	Primary Sponsor	Priority	Position	Lead Analysis Program	Lead Analysis Preparer
	Tuesday, December 31, 2013						
8:00 AM	Committee	Type	Location				
	Agriculture & Natural Resources	Work	House Hearing Rm B John L. O'Brien Building				
	SHB 1010	Antifreeze products	Sherry Appleton	High	Opposes	Government Relations	Brenda Davis
	2SHB 1416	Irrigation distrct financing	Judy Warnick				

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- “Priority” and “Position” are based on the most recent Agency Bill Detail information. If no Agency Bill Detail exists, the report looks for the most recent Bill Analysis marked “Lead”.
- “Program” and “Preparer” are based on the most recent Bill Analysis marked “Lead”. If multiple Analyses are marked “Lead”, the one with the most recent creation date is used. If no Analyses are marked “Lead”, no information is pulled onto the Hearing Report for these categories.