

This job aid includes information for agency administrators and agency coordinators.

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Contacts

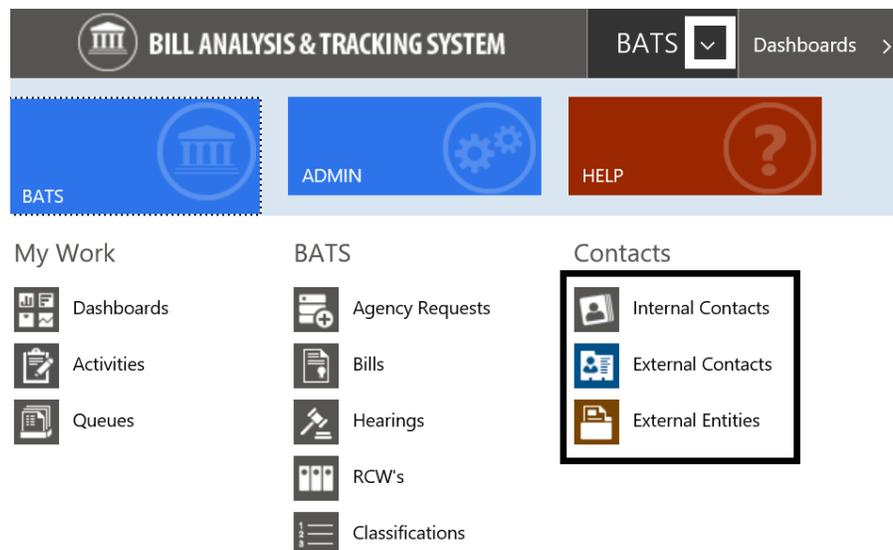
BATS uses standard tools and processes to support agency request legislation and bill tracking. For example, you can maintain information about contacts (people and groups) so that your agency can connect them to agency request legislation and bill tracking.

- ✓ Internal contacts are your agency BATS users. The agency administrator can manage security/permissions for internal contacts. Most agencies need a primary agency administrator and a backup agency administrator to help manage security/permissions.

Contacts	Example	Additional Information
Internal Contacts	✓ Agency BATS User	✓ BATS security/permissions are managed by the agency administrator.
External Contacts	<ul style="list-style-type: none"> ✓ Legislator ✓ Sponsor 	✓ Legislator information is automatically imported from the Legislative Service Center (LSC).
External Entities	<ul style="list-style-type: none"> ✓ Committee ✓ Vendor 	✓ Organization or group.

Agency administrators can create and maintain contact information for their agency.

1. **Select:** Down arrow next to BATS.
 2. **Select:** Internal Contacts
-- or --
Select: External Contacts
-- or --
Select: External Entities.
- ➔ BATS will display a list of contacts for your agency.



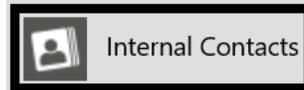
The screenshot shows the BATS application interface. At the top, there is a header with the TIU logo and 'BILL ANALYSIS & TRACKING SYSTEM'. To the right of the header, there is a dropdown menu currently set to 'BATS' and a 'Dashboards' link. Below the header, there are three main navigation buttons: 'BATS' (blue), 'ADMIN' (blue), and 'HELP' (red). The main content area is divided into three columns: 'My Work', 'BATS', and 'Contacts'. The 'Contacts' column contains three items: 'Internal Contacts', 'External Contacts', and 'External Entities'. The 'Internal Contacts' item is highlighted with a black border.

Internal Contacts

Internal contacts are your agency BATS users. For example, people who will prepare and review agency analysis information or track bills for your agency.

- ✓ Internal contacts need a valid user name and security role to use BATS.
- ✓ BATS is based on Microsoft Dynamics Customer Relationship Management (CRM) software so there are several optional fields for internal contacts that you probably will not use. For example, after you create the internal contact, you can update the fields that provide relevant information for your agency and leave the rest of the fields blank.

1. **Select:** Internal Contacts.
 → BATS will display a list of internal contacts for your agency.



2. **Select:** New.



3. **Input:** User Name.
 → You may also need to input required information for first name, last name, and business unit if BATS does not auto-fill the fields.

In this example, we input the email address for the BATS user name.

User Name *

→ If your agency uses BATS outside the State Government Network (SGN) via Secure Access Washington (SAW), BATS will not auto-fill values for first name, last name, and business unit so you will also need to input information for those required fields. Ensure the user name (email address) matches the SAW user name (email address).

4. **Select:** Save.
 → Agency administrators need to complete additional steps to provide [security/permissions](#) for the new internal contact.



In this example, we input a single sign on (SSO) user name because our agency uses BATS inside the State Government Network (SGN) with Microsoft Azure and Active Directory. BATS will validate the user name and agency information to auto-fill values for first name, last name, and business unit when we tab out of the user name field.

→ **Caution!** In most cases, you will input the work email address for the user name. For example, some agency administrators input a single sign on (SSO) userid and tab out of the name field so that BATS will auto-fill the first name, last name, and business unit. Then they go back to the user name field and input the work email address for the user name. This saves them a couple of steps and provides a quick verification for the user information.

User Name * -- or -- User Name *

User Information	
First Name *	Sample
Last Name *	Employee
Title	Sample
Primary Email	Sample.Employee@agency.wa.gov
Organization Information	
Position	--
Manager	--
Business Unit *	123 Sample Agency

External Contacts

External contacts include people outside of your agency. For example, a bill sponsor or someone who will need to be notified of the date/time for a bill signing ceremony.

- ✓ Legislator information is automatically imported from the Legislative Service Center (LSC) so you will not need to create or maintain their information as part of your agency external contacts.
- ✓ BATS is based on Microsoft Dynamics Customer Relationship Management (CRM) software so there are several optional fields for the external contact that you probably will not use. For example, a contact name is required to create an external contact. After you create an external contact, you can update the fields that provide relevant information for your agency and leave the rest of the fields blank.

1. Select: External Contacts. ➔ BATS will display a list of external contacts for your agency.	 External Contacts						
2. Select: New.							
3. Select: Full Name. ➔ BATS will display additional fields so that you can input the first and last name.	Full Name * <input style="width: 150px; height: 20px;" type="text"/>						
4. Input: First Name. 5. Input: Last Name. 6. Select: Done.	<table border="1" style="border-collapse: collapse;"> <tr> <td style="padding: 5px;">First Name +</td> <td style="width: 150px; height: 20px;"><input type="text"/></td> </tr> <tr> <td style="padding: 5px;">Last Name *</td> <td style="width: 150px; height: 20px;"><input type="text"/></td> </tr> <tr> <td colspan="2" style="text-align: right; padding: 5px;"> <input style="border: 2px solid black;" type="button" value="Done"/> </td> </tr> </table>	First Name +	<input type="text"/>	Last Name *	<input type="text"/>	<input style="border: 2px solid black;" type="button" value="Done"/>	
First Name +	<input type="text"/>						
Last Name *	<input type="text"/>						
<input style="border: 2px solid black;" type="button" value="Done"/>							
7. Select: Save.	<input style="border: 2px solid black;" type="button" value="Save"/>						

External Entities

External entities include committees and vendors. For example, an external entity may be a local committee but is not usually another state agency. Committee members may be external contacts that get associated to the external entity for tracking and reporting purposes.

- ✓ BATS is based on Microsoft Dynamics Customer Relationship Management (CRM) software so there are several optional fields for the external entity that you probably will not use. For example, the entity name is required to create an external entity. After you create an external entity, you can update the fields that provide relevant information for your agency and leave the rest of the fields blank.

1. Select: External Entities. ➔ BATS will display a list of external entities for your agency.	 External Entities
2. Select: New.	
3. Input: Entity Name.	Entity Name * <input style="width: 180px; height: 20px;" type="text"/>
4. Select: Save.	<input style="border: 2px solid black;" type="button" value="Save"/>

Link External Contact to External Entity

External contacts can be linked to external entities for tracking and reporting purposes.

<p>1. Select: External Contacts. → BATS will display a list of external contacts for your agency.</p>	 External Contacts
<p>2. Select: External Contact.</p>	My Active Contacts ▾ ✓ Full Name ▾ ✓ Sample
<p>3. Select: <input checked="" type="checkbox"/> Down arrow next to Connect.</p> <p>4. Select: To Another.</p>	SAVE SAVE & CLOSE + NEW DEACTIVATE CONNECT ▾ To Another
<p>5. Select: Name. This is the name of the external entity. → Use  lookup to find the external entity name.</p>	Connect To Name <input type="text"/> 
<p>6. Select: As this role. → Use  lookup to find the role.</p>	Name <input type="text" value="Sample"/>  As this role * <input type="text"/> 
<p>7. Input: Description. → Describe why you are connecting the contact to the external entity. This information may be helpful for other people in your agency.</p>	Name <input type="text" value="Sample"/>  As this role * <input type="text" value="Ceremony Contact"/>  Description <input type="text"/>
<p>8. Select: Save.</p>	Save

Manage Security/Permissions for Internal Contacts

Agency administrators can manage security/permissions for their [internal contacts](#).

- ✓ BATS uses standard security protocols to validate user name and agency information. For example, internal contacts need a valid user name and security roles to use BATS.
- ✓ Agency administrators and agency coordinators need to be connected to an additional [team role](#) so they can assign reviewers/preparers for agency analysis.

Security/Permissions (Roles)

Agency administrators can add and remove roles for their [internal contacts](#).

1. **Select:** Internal Contacts.
 → BATS will display a list of internal contacts for your agency.



2. **Select:** Internal Contact.



3. **Select:** Down arrow next to the internal contact name.



4. **Select:** Security Roles.
 → BATS will display a list of roles for the internal contact.



5. **Select:** Manage Roles.

Role Associated View

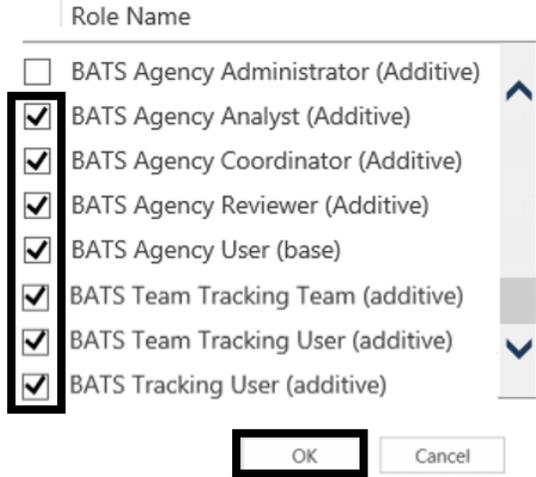


6. **Select:** Checkbox next to roles you want to add.

7. **Select:** OK.
 → You can also uncheck the checkbox next to roles you want to remove for the internal contact.

In this example, we select the [roles](#) needed for an agency coordinator.

- ✓ The agency coordinator will also need an additional [team role](#) so they can assign reviewers/preparers for agency analysis.



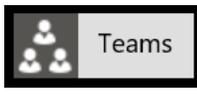
Security/Permissions (Teams)

Agency administrators and agency coordinators need an additional team [role](#) so they can make assignments for agency analysis. For example, this role is required for an agency coordinator to assign a preparer and reviewer for agency bill analysis.

1. **Select:** Down arrow next to the internal contact name.



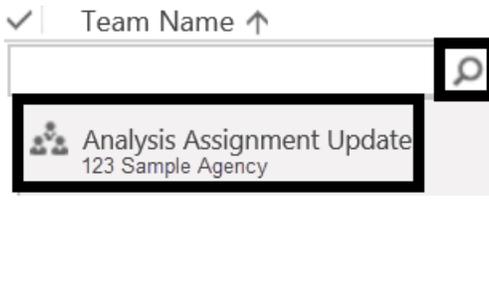
2. **Select:** Teams.
 → BATS will display a list of teams assigned to the user.



3. **Select:** Add Existing Team.



4. **Select:** Team Name.
 → Use 🔍 lookup to find the team name.
 → Agency administrators and agency coordinators need the Analysis Assignment Update team role.



Security/Permissions (Enable/Disable Internal Contacts)

Agency administrators can use the enable option to activate a BATS user and the disable option to inactivate a BATS user. For example, you cannot delete an agency BATS user so you will use the disable option if someone transfers to a different agency.

✓ Agency administrators need to maintain their list of active users. For example, use the disable option if your internal contact transfers into a new job in your agency and will not need to use BATS. If they need to use BATS again for your agency, you can use the enable option. This helps to ensure your list of active users is current for software licensing and auditing purposes.

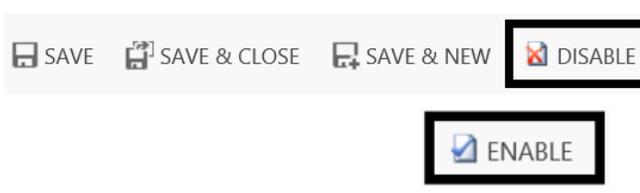
1. **Select:** Internal Contacts.
 → BATS will display a list of internal contacts for your agency.



2. **Select:** Internal Contact.
 → BATS will display internal contact information.



3. **Select:** Disable
 -- or --
Select: Enable.



Additional Information - Roles and Security/Permissions

Agency administrators can manage security/permissions for their [internal contacts](#).

- ✓ Agency data is secured by user roles with security/permission levels. This helps to ensure agencies control and manage their information.
- ✓ BATS user roles are additive. For example, all of your agency users will need basic roles to display/track bills and your agency coordinator will need several additional roles.

BATS Security Role →	Agency User Role	Agency Analyst Role	Agency Reviewer Role	Agency Coordinator Role	Agency Administrator Role	Tracking User Role	Team Tracking Team Role	Team Tracking User Role
Your Agency Role ↓								
Agency User	Yes	No	No	No	No	Yes	Maybe	No
Agency Analyst	Yes	Yes	No	No	No	Yes	Yes	No
Agency Reviewer	Yes	Yes	Yes	No	No	Yes	Yes	No
Agency Coordinator	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes
Agency Administrator	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

BATS Security Role	Additional Information/Example
BATS Agency User	<ul style="list-style-type: none"> ✓ Basic role required for all BATS users. ✓ All agency users need this role to logon to BATS and display information.
BATS Agency Analyst	<ul style="list-style-type: none"> ✓ Prepare analysis for agency request and/or bill. For example, input/edit/format and select 'ready for review'; add notes and attachments. ✓ Agency analysts, reviewers, coordinators, and administrators need this role.
BATS Agency Reviewer	<ul style="list-style-type: none"> ✓ Review analysis. For example, edit/format, add notes and attachments. ✓ Agency reviewers, coordinators, and administrators need this role.
BATS Agency Coordinator	<ul style="list-style-type: none"> ✓ Manage agency analysis and assignments. For example, create agency request; create analysis for agency request and/or bill; assign preparer and/or reviewers. ✓ Agency coordinators and administrators need this role.
BATS Agency Administrator	<ul style="list-style-type: none"> ✓ Manage agency request legislation, bill tracking, agency analysis, and assignments. For example, provide final review for agency analysis and submit agency request legislation to OFM. Makes final decisions for their agency. ✓ Manage BATS security/permissions for their agency. ✓ Agency administrators need this role.
BATS Tracking User	<ul style="list-style-type: none"> ✓ Display and track bill-related information. ✓ All agency users need this role to track bills and receive email updates for tracked bills.
BATS Team Tracking Team	<ul style="list-style-type: none"> ✓ Display and track bill-related information as part of a division/team. ✓ Agency users need this role to track bills as part of a team. For example, some agencies assign this role to their analysts, reviewers, coordinators, and administrators to collaborate on specific information as part of a team.
BATS Team Tracking User	<ul style="list-style-type: none"> ✓ Manage tracking for agency/division/team. For example, create assignments for tracking. ✓ Agency coordinators and administrators need this role.
Team Role	Additional Information
Analysis Assignment Update	<ul style="list-style-type: none"> ✓ Assign reviewer and/or preparer for agency analysis. ✓ Agency administrators and coordinators need this role.

Additional Information - Sample Agency Roles

BATS uses standard tools and processes to support agency request legislation and bill tracking.

- ✓ Agencies will use BATS as a tool to support processes. For example, you will develop internal business processes to help ensure your agency request legislation and bill tracking teams successfully plan and communicate their activities as they collaborate during legislative sessions. In some agencies, the coordinator tracks information and prepares the analysis for reviewers. In other agencies, the coordinator tracks information but does not prepare the analysis for reviewers.

Sample Role	Sample Information
Agency User	<ul style="list-style-type: none"> ✓ Display information. ✓ Track bills.
Agency Analyst ✓ Subject matter expert with specific, detailed knowledge about a topic considered for agency request legislation or bill analysis.	<ul style="list-style-type: none"> ✓ Receive assignments from the agency coordinator. ✓ Collaborate with other subject matter experts and budget analysts to prepare analysis for agency request legislation and bill tracking.
Agency Reviewer ✓ Reviewers may be supervisors or managers who will review information provided by agency analysts.	<ul style="list-style-type: none"> ✓ Receive assignments from the agency coordinator. ✓ Review and edit agency analysis to help ensure it is complete and accurate.
Agency Coordinator ✓ Some agencies assign the coordinator role to several people across their divisions. For example, each division or business unit may have their own coordinator to assign preparers and reviewers.	<ul style="list-style-type: none"> ✓ Track, monitor, and coordinate activities for division and/or agency. ✓ Assign preparers and reviewers for agency analysis. ✓ Assist with agency analysis and/or prepare the analysis. ✓ Review analysis and send link to administrator with additional information. ✓ Provide training for their agency teams (how to use BATS to support their agency processes). ✓ Provide information and communication for their agency teams (legislative meeting schedules, etc.).
Agency Administrator ✓ Manage security/permissions for their agency. ✓ Agency administrators can perform all other roles plus they can complete the final review/edit for agency analysis and submit agency request legislation to OFM.	<ul style="list-style-type: none"> ✓ Track, monitor, and manage activities for the agency. ✓ Assign bills to agency coordinator. ✓ Provide final review for agency analysis and make final decisions for the agency. ✓ Determine participation levels for hearings (attendance, options/format, approve materials/presentation, etc.). ✓ Caution! The agency administrator can override assignments and workflow for other people. For example, mark items complete on action items assigned to other roles or use reset to restart review cycles.