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

Dashboards
BATS includes several dashboards to display data from multiple areas and views. For example, you can use a dashboard to display ‘at a glance’ information or status, drill down for more details, or open an activity/task.

- System dashboards are created and maintained by BATS support staff so you cannot modify them.
- My dashboards are created and maintained by you. For example, you can use an existing dashboard to create a new custom dashboard using standard Microsoft tools.

In this example, we use a system dashboard to display information and status about activities. The dashboard includes two views (my open activities and my closed activities).

- Most dashboards include multiple views. For example, you can use a system dashboard and select different views to display additional information.
**Default Dashboard**

Use the set as default option to designate a different dashboard for your ‘home page’.

**Create Custom Dashboard (My Dashboard)**

Use an existing dashboard to create a new custom dashboard. For example, you can create a new dashboard from your default dashboard and use standard Microsoft tools to edit the name, select different views, or apply other changes.

- **BATS online help** is useful for Microsoft tools such as Dashboards. The online help icon is located in the top banner area. Information is based on Microsoft Dynamics so it will not include specific processes or references for bill analysis and tracking.

1. **Select:** Save as.
   - BATS will display dashboard properties.

2. **Input:** Name. This will be the name of your new dashboard.

3. **Input:** Description.
   - Provide a brief description for your dashboard. This information is helpful if you plan to share your dashboard with other BATS users.

4. **Select:** Save.

5. **Select:** Edit.
   - BATS will display dashboard components.

6. **Select:** Dashboard section.
   - Dashboard components are the sections within a dashboard. For example, dashboard components usually include lists, views, and visuals (graph, chart, etc.).

7. **Select:** Edit Component.
   - BATS will display dashboard edit options for the components in the section.

✓ Use the properties option to edit the name or description for the dashboard.
8. **Edit**: Components.

- If you want the ability to select other views on your dashboard, use the view selector for additional options.

- Use the ellipsis located on the toolbar to edit the width or height of dashboard components.

9. **Select**: OK.

- Use the online help icon located in the top banner area to display additional information for creating custom dashboards. The information is based on Microsoft Dynamics (it will not include specific processes or references to BATS but is useful for advanced dashboard tools and techniques).

In this example, we use the display tab to input a unique name and a label name for the dashboard. We also select all activities for the default view.

10. **Select**: Save.

11. **Select**: Close.
Share Dashboard
You can share your dashboard with other BATS users in your agency.
✓ When you share a dashboard, you can also manage permissions for the dashboard. For example, you can share your dashboard with read only permissions or you can allow someone else to delete the dashboard.

   ➤ BATS will display common tools for sharing a dashboard.

2. Select: Checkbox next to permission level.
   ➤ Use Add User/Team to lookup users or teams to add to the list.

Assign Dashboard
You can assign your dashboard to another BATS user in your agency. For example, you can assign your dashboard to another person so that they own the dashboard. Some agencies use this when a user is transitioning to another job or retiring because they can assign ownership of their dashboards to someone else on their team.

1. Select: Assign.
   ➤ BATS will display common tools for assigning a dashboard.

2. Select: Assign to another user or team.
3. Select: User or Team.
   ➤ Use lookup to find the user or team.
   ➤ Caution! When you assign the dashboard to another user, you will no longer be the owner of it. If you need to use the dashboard, the new owner can share it with you or assign it to you.
**Activities**

Use activities to create or display information about assignments and tasks. For example, you can display ‘at a glance’ information or status, drill down for more details, or create an appointment.

In this example, we select the dropdown to display other options for the list of activities. You can create a variety of activities using options on the toolbar.
Queues
Use queues to find and complete your action items.

✓ BATS will update your queue when an action item is assigned to you. For example, BATS will add a task to your queue when you get an action item to provide agency bill analysis or review agency bill analysis.
✓ Remember to mark your items complete when you are done with your action item. BATS will use that information to update the status of items in the queues.

1. Select: Down arrow next to BATS.
2. Select: Queues.

3. Select: Item in the queue.
   ➤ BATS will open the item so that you can complete your action item.
   ➤ Remember to mark the item complete when you are done with your action item. BATS will use that information to update the status of items in the queues.
   ➤ If your action item is overdue, BATS will add another item to your queue. For example, you may have more than one task in your queue for the same action item (the original task plus the overdue task). Remember to mark both tasks complete so that BATS updates the status of both items in the queue.

In this example, we select an item in the queue.

All Items

<table>
<thead>
<tr>
<th>Queue: Sample</th>
<th>Title</th>
<th>Entered Queue</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Overdue analysis for sample</td>
<td>Sample Date/Time</td>
<td>Task</td>
</tr>
<tr>
<td></td>
<td>Prepare the analysis for sample</td>
<td>Sample Date/Time</td>
<td>Task</td>
</tr>
<tr>
<td></td>
<td>Review the analysis for sample</td>
<td>Sample Date/Time</td>
<td>Review Entry</td>
</tr>
</tbody>
</table>

In this example, we mark the item complete when we are done with our action item.
✓ BATS will display the mark complete option in the details for an open action item.