For additional information about the Bill Analysis & Tracking System (BATS), please contact the OFM Helpdesk at HereToHelp@ofm.wa.gov or 360.407.9100.

General Questions

What is BATS?

✓ The bill analysis and tracking system (BATS) is used by agencies to manage and track legislation. Bill information is automatically imported every hour from the Legislative Service Center.

How do I get access to BATS?

✓ Contact your BATS agency administrator. Agency administrators manage security/permissions for their agency BATS users. Agency data is secured by user roles with security/permission levels. This helps to ensure agencies control and manage their information.

How do I log in to BATS?

✓ Most agency BATS users will log in using Single Sign On (SSO) inside the State Government Network (SGN). Log in to your agency network > open Internet Explorer (preferred browser) > input BATS production environment link (https://xcrm.wa.gov/CRMBATS/main.aspx).

✓ Some agency BATS users will log in using their Secure Access Washington (SAW) account outside the State Government Network (SGN).

### How do I log out from BATS?

✓ Close your browser window. BATS does not have a separate log out option.

Does BATS have a training environment that my agency can use?

✓ BATS has a staging environment that can be used for agency training. The BATS agency administrator will manage security/permissions for BATS users in the staging environment (https://st.xcrm.wa.gov/crmbats/main.aspx).

Does BATS have a preferred browser or settings that I need to know about?

✓ BATS works best with current versions of Microsoft Internet Explorer. Follow your agency standard processes for browser settings/preferences. For example, you may need to use your browser tools to adjust pop-up blocker settings.
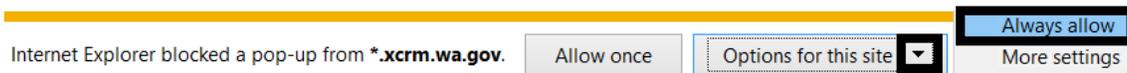
Help and Resources

Is there a quick eLearning course for BATS?

✓ BATS eLearning is currently available via the statewide Learning Management System (LMS). The interactive 30-minute BATS eLearning course is a great way to quickly learn how to use BATS.

Is there a distribution list for news and updates about BATS?

✓ Sign-up for news and updates via GovDelivery on the OFM website. Subscribe to Budget Systems Modernization ☑ Budget Systems Modernization ⓘ via https://public.govdelivery.com/accounts/WAGOV/subscriber/topics.

Why does BATS online help have references to Microsoft Dynamics?

✓ BATS uses standard Microsoft Dynamics customer relationship management (CRM) software tools. For example, system online help is useful for Microsoft tools such as creating custom dashboards. The online help icon 🖪 is located in the top banner area. Information is based on Microsoft Dynamics so it will not include BATS-specific information or processes.

Navigation

What are the breadcrumbs?

✓ Breadcrumbs are links near the top of a page that help to identify the page or area you are on (use the links to quickly go back to a previous area). In this example, the breadcrumb includes BATS Queues because we are on the Queues page to get a list of our action items.

What is a quick way to get back to the BATS 'home' page/default dashboard?

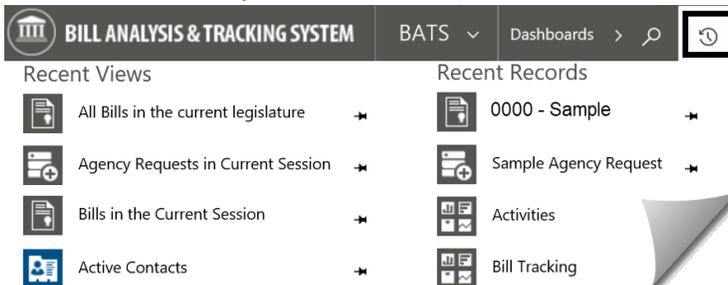✓ Select the BATS logo area near the top of a page to get back to the BATS 'home' page (your default dashboard).

What is a quick way to go back to another section in a bill or agency analysis?

✓ Select the ⬛ form sections icon on the bill information page, agency request page, or agency analysis page.

BILL : BILL INFORMATION

0000 - Sample

Bill #
Bill ID

General
Agency Position
Agency Contacts
Chamber Votes
Sponsors
Analysis
Notes

AGENCY REQUEST : AGENCY REQUEST INFORMATION
Sample

General
Agency Contacts
Legislation Tied to a Budget Request
Analysis
Attachments/Notes

ANALYSIS : AGENCY ANALYSIS
Sample

General
Assignments
Analysis Details
Review Task Details
Supplemental Information
Notes

How do I find recent views or records?

✓ Use the 🕐 recently viewed items option located on the top banner area.

Recent Views

All Bills in the current legislature

Agency Requests in Current Session

Bills in the Current Session

Active Contacts

Recent Records

0000 - Sample

Sample Agency Request

Activities

Bill Tracking

What is the difference between 'save' and 'save & close'?

✓ Save = saves your changes and you stay on the current page.

✓ Save & Close = saves your changes and you go back to a previous page. For example, BATS will save your changes and take you back to the task page so that you can mark your item complete.

💾 SAVE   💾 SAVE & CLOSE

Can I export a list of bills to Excel?

✓ Use the export to excel option on the toolbar.

Why do some fields have a red asterisk or other symbol next to them?

✓ Required fields have a red asterisk (*) next to them. In this example, the short title is a required field.

Short Title *   * = required field

| Field Symbol	Additional Information
Red Asterisk *	Field is required.
Blue Plus Sign ✚	Field is designated for specific OFM reporting purposes.
Lock 🔒	Field is locked. For example, you cannot update the bill status because it is a locked field.
Key 🗝	Field has additional security/permissions. For example, BATS will display several asterisks (*******) if you do not have security/permission to display key information.

Filters/Views/Queues

What is the difference between a system view and a personal view?

✓ System view = created and maintained by BATS support staff (you cannot modify it).
✓ Personal view = created and maintained by you.

➜ In this example, the system view is 'all bills in the current legislature'. Select the dropdown next to the view to select a different view or create a personal view.
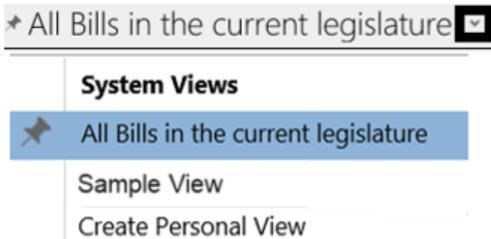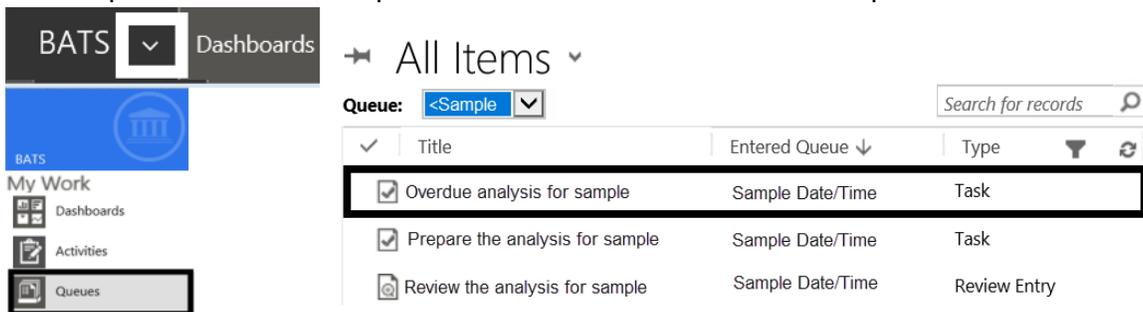

What is the difference between the view for 'current legislature' and 'current session'?

✓ Current Legislature = includes one or more sessions.
✓ Current Session = includes only one session. For example, a regular session or a special session.
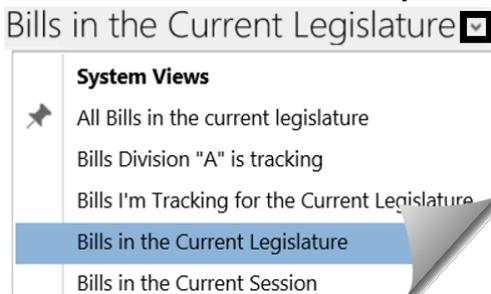
What are queues? Why do I have a list of old action items in my queue?

✓ Queues include a list of action items. You can use the 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.

➔ In this example, we select the down arrow next to BATS and select Queues to display a list of items in our sample queue.

✓ If your action item is overdue, BATS will add another task to your queue. You may have more than one task in your queue for the same action item. For example, a task for the original action item and a task for the overdue action item. When you complete your action item, remember to mark both tasks complete so that BATS updates the status of both items in the queue.

➔ In this example, we mark the item complete when we are done with our action item. The mark complete option is available in the details for an open action item.
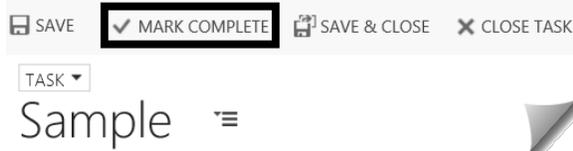
Search/Advanced Find

What is the difference between search and advanced find?

✓ Search = available on most of the BATS pages.

➔ Use search to find and select items based on information in the first column of a list. You can search using the bill number or text in the bill short title if it is the first column of a list. If you search using text in the bill short title, include the wildcard ***** (asterisk). In this example, we search for bills with 'dog' in the bill short title.


✓ Advanced Find = available on top banner of all BATS pages.

➔ Use advanced find to search for records or activities. BATS will display advanced find options with a list of items you can use for the advanced find.

## Can I use advanced find to search for agency requests tied to a budget request?

✓ The field for 'agency budget decision package' is available in advanced find. For example, you can use advanced find to look for agency requests with or without budget decision packages.
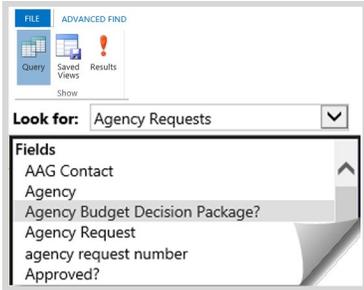
Agency Contacts

Where is the agency contacts section for stakeholders?

✓ Agency contacts section is available on agency request legislation and on the bill information page. For example, use the agency contacts section to provide information about stakeholders and other contacts.
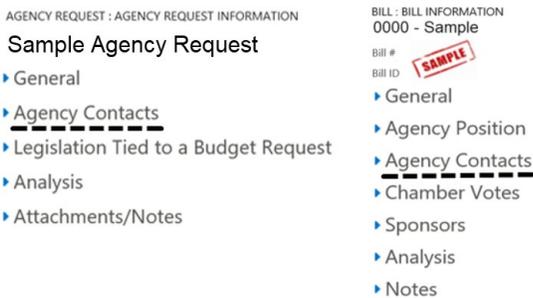
Agency Request Legislation

Why do I get an error message when I try to delete my draft agency request?

✓ You might have agency analysis details attached to your draft agency request. You cannot delete a draft agency request if it includes agency analysis details. Delete the agency analysis first then delete the draft agency request.

What is the difference between the attachments/notes section and the notes section?

✓ Attachments/notes = section on the agency request.
✓ Notes = section on the analysis for the agency request. For example, an agency request can include multiple analysis records. Each of the analysis records can have their own notes.