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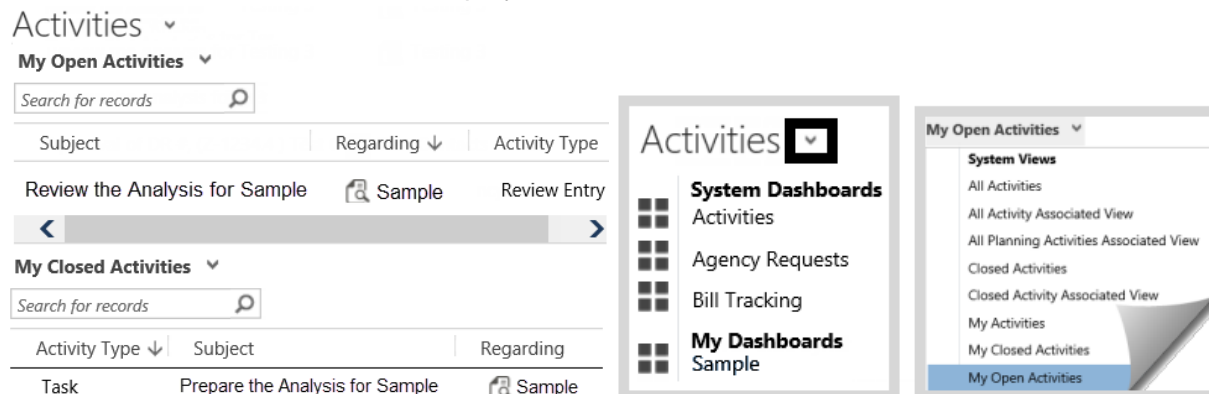
Dashboards

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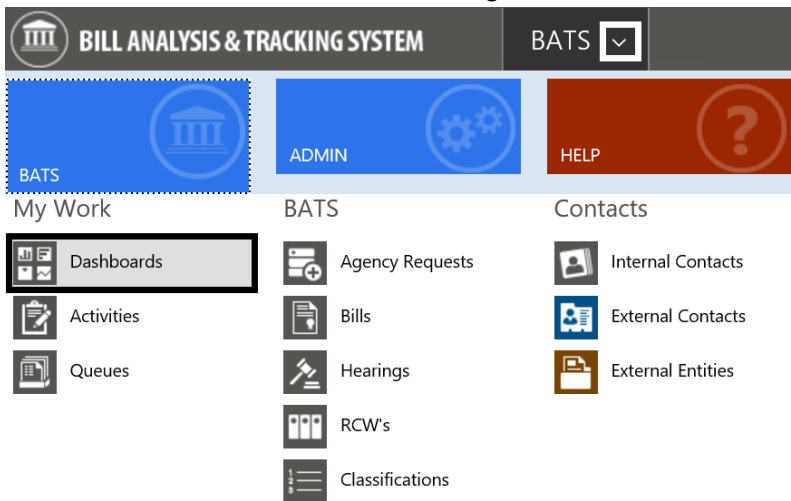
➔ In this example, we use a system dashboard to display information and status about activities. The dashboard includes two views (my open activities and my closed activities).

✓ 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.

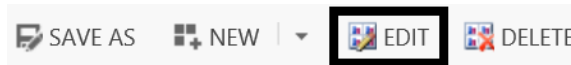4. **Select:** Save.

Dashboard Properties

Provide a name and description for this dashboard. The name will be visible in the dashboard list.

Name *
Sample

Description

☐ Enable for mobile

Save   Cancel

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.).

In this example, we select the section for the activities view.

Name: * Sample

Activities : View Selector ⌄

Chart
Activities by Type
My Activities
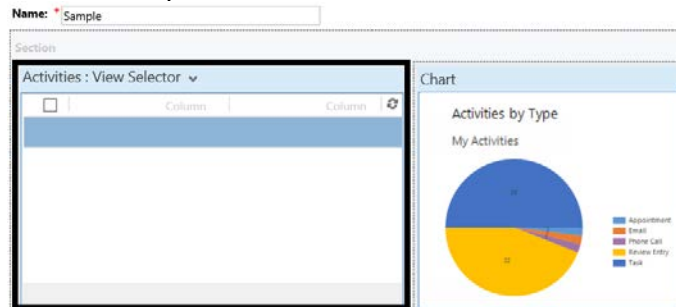
7. **Select:** Edit Component.
➔ BATS will display dashboard edit options for the components in the section.
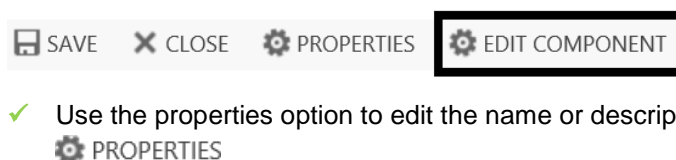
✓ Use the properties option to edit the name or description for the dashboard.
⚙ PROPERTIES

8. **Edit:** Components.

9. **Select:** OK.

➔ 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.

▪▪▪
☐ Iframe
↔ Increase Width
→← Decrease Width
↕ Increase Height
↕ Decrease Height
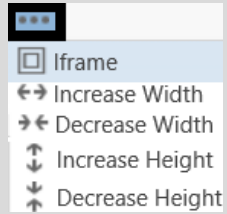
➔ Use the online help ? icon located in the top banner area to display additional information for creating custom dashboards. The information is based on Microsoft Dynamics (it will not include specific processes or references to BATS but is useful for advanced dashboard tools and techniques).

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.

| Display | Controls |

Name
Specify a unique name.
Name * `Sample`

Name
Label * `Sample Activities`
☑ Display label on the Dashboard

Data Source
Specify the primary data source for this list or chart.
Records   `All Record Types` ▼
Entity   `Activities` ▼
Default View `All Activities` ▼

Additional Options
☑ Display Search Box
☑ Display Index ℹ
View Selector   `Show All Views` ▼
My Team Members' Activities
Open Activities
Review Entry Activities
Scheduled Activities

Chart Options
Default Chart   `Activities by Type` ▼
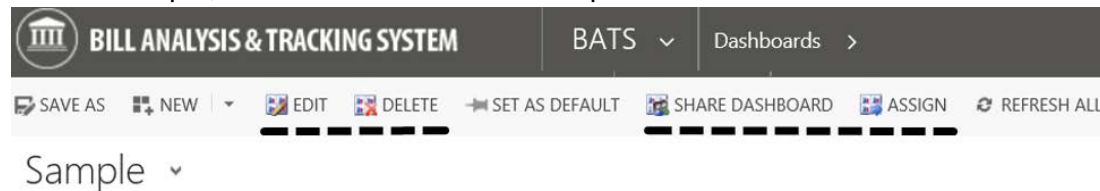☐ Show Chart Only
☑ Display Chart Selection

System Charts
Activities by Month Due
Activities by Owner
Activities by Owner and Priority
Activities by Priority
Activities by Type
Activities by Type and Priority
Activity by Actual End and Activity Type

OK   Cancel

10. **Select:** Save.

11. **Select:** Close.

🖫 SAVE   ✕ CLOSE   ⚙ PROPERTIES ⚙ EDIT COMPONENT   🗑 REMOVE   ↶ UNDO   📊 CHART ≣ LIST ⊕ WEB RESOURCE ⋯

In this example, we have additional toolbar options on a custom dashboard.

🏛 **BILL ANALYSIS & TRACKING SYSTEM**   BATS ⌄   Dashboards >

⮊ SAVE AS   📇 NEW ⌄   📝 EDIT   📇 DELETE   ⇥ SET AS DEFAULT   📇 SHARE DASHBOARD   📇 ASSIGN   ⟳ REFRESH ALL

Sample ⌄

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.

1. **Select:** Share Dashboard.

➔ BATS will display common tools for sharing a dashboard.

2. **Select:** Checkbox next to permission level.

3. **Select:** Share.

➔ Use Add User/Team to lookup users or teams to add to the list.

In this example, we select permission levels to share the dashboard.

Share user dashboard

Choose the users or team you want to share the user dashboard with, and give them specific permissions.

Common Tasks			Name	Read	Write	Delete	Append	Assign	Share
👤 Add User/Team		☐	👤 Sample Name	☑	☑	☐	☐	☐	☐
✕ Remove Selected Items									
✓ Toggle All Permissions of the Selected Items									
🗐 Reset							Share	Cancel	

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.

SHARE DASHBOARD   ASSIGN
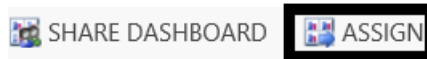
2. **Select:** Assign to another user or team.

3. **Select:** User or Team.

➔ Use 🔍 lookup to find the user or team.

4. **Select:** Assign.

➔ **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.

Assign User Dashboard

You have selected 1 User Dashboard. To whom would you like to assign it?

○ **Assign to me**
Assign the selected User Dashboard to yourself.

⦿ **Assign to another user or team**
Assign the selected User Dashboard to the following user or team:

[   ] 🔍

Assign   Cancel

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.
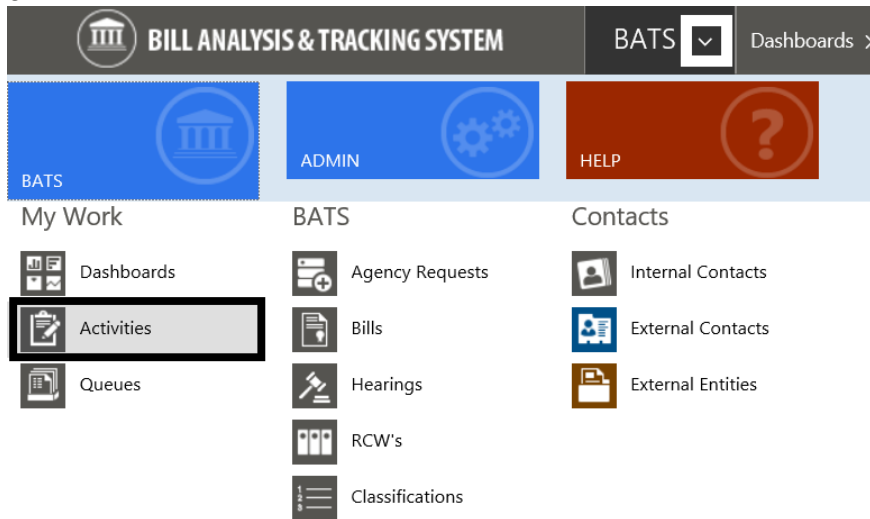
In this example, we select the dropdown to display other options for the list of activities.
✓ You can create a variety of activities using options on the toolbar.
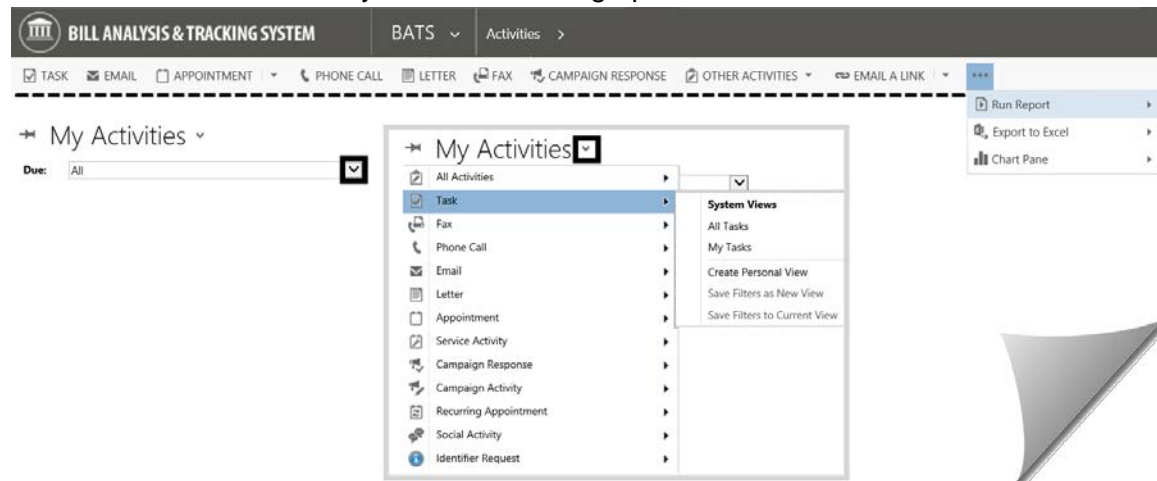
Queues

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.
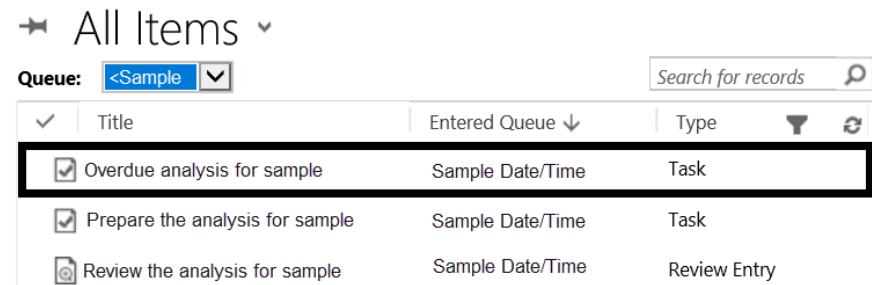
1. **Select:** ☑ Down arrow next to BATS.

2. **Select:** Queues.

III BILL ANALYSIS & TRACKING SYSTEM BATS ☑ Dashboards

BATS | ADMIN | HELP

My Work
- Dashboards
- Activities
- Queues

BATS
- Agency Requests
- Bills
- Hearings
- RCW's
- Classifications

Contacts
- Internal Contacts
- External Contacts
- External Entities

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.

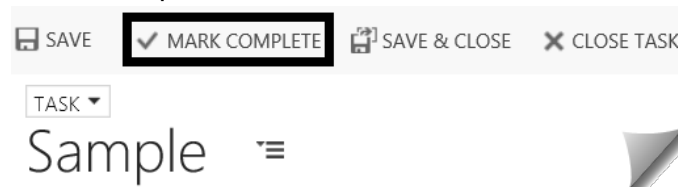In this example, we select an item in the queue.

📌 All Items ˅

Queue: <Sample> ☑   Search for records 🔍

✓	Title	Entered Queue ↓	Type
☑	Overdue analysis for sample	Sample Date/Time	Task
☑	Prepare the analysis for sample	Sample Date/Time	Task
⊚	Review the analysis for sample	Sample Date/Time	Review Entry

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.

💾 SAVE   ✓ MARK COMPLETE   📑 SAVE & CLOSE   ✕ CLOSE TASK

TASK ▾

Sample ≡