BILL ANALYSIS AND TRACKING SYSTEM (BATS)

2015 Quick Reference Guide – For Legislation Tracking and Analysis

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November 2015

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Introduction to BATS

Brief Overview of (Bill Analysis and Tracking System) BATS

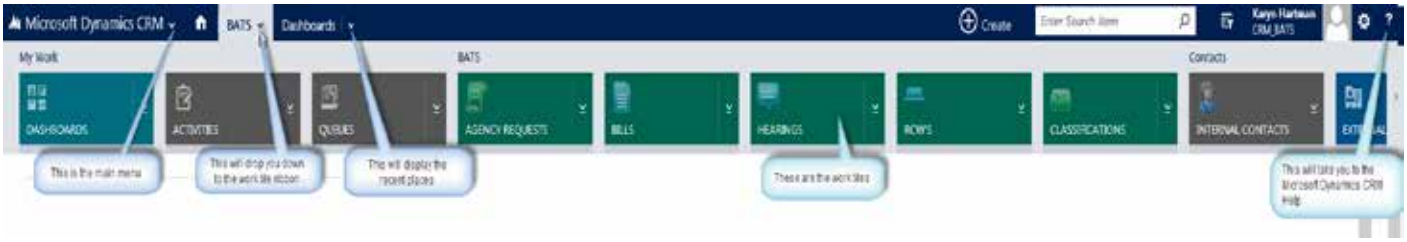
- Documentation is available online at: http://www.des.wa.gov/services/IT/SystemSupport/Pages/Bill-Analysis-and-Tracking-System-BATS.aspx
- Help is available for BATS specific information:
  - WaTech Solutions Center
    - Phone: (360) 407-9100
    - Email: **solutionscenter@watech.wa.gov**
  - Training Environment URL: **https://tr.xcrm.wa.gov/crmbats**
  - Production Environment URL: **https://xcrm.wa.gov/crmbats**

Layout/Navigation

Microsoft Dynamics CRM is designed so that you can access work areas and other information quickly when you need them.

If you see the Yellow Ribbon Bar, X out of (you will only need to do this one time)

The dark blue navigation bar provides access to the menus which allows you to perform common tasks quickly.



Dashboards are the default view when logging in

BATS may open multiple screens based on the selected function

Home Button , will take you to your home page

Contacts

There are three different types of contacts within the BATS system: Internal, External and External Entities. Each type is utilized in the system differently.

To have the ability to create certain types of contacts for your agency you will need to have the Admin, Coordinator, or Analyst security role

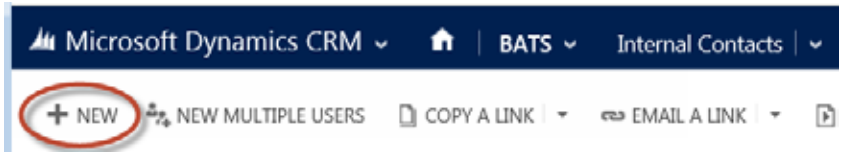
Internal Contacts (USERS)

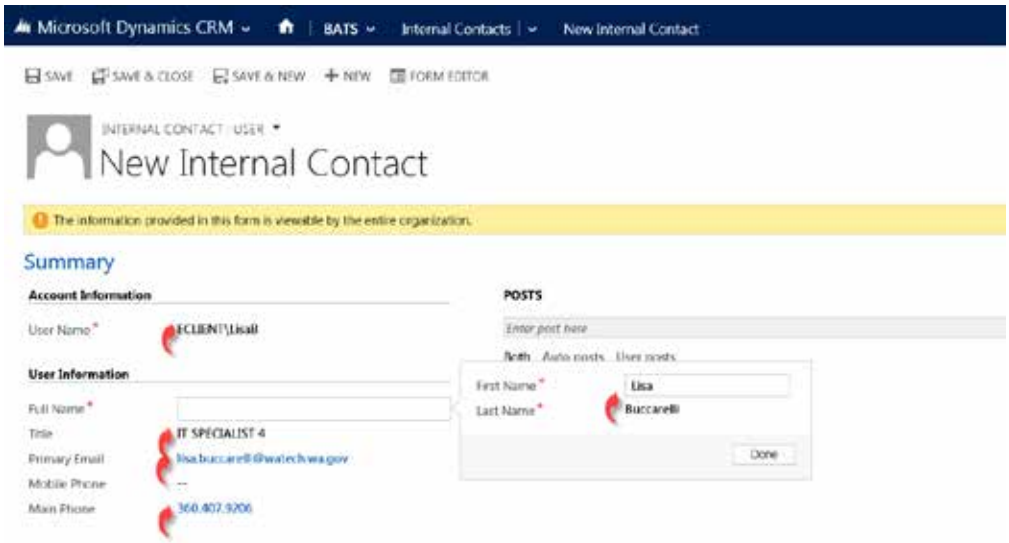
An Internal Contact is any person within your agency who will be accessing the system

Creating An Internal Contact

- To begin creating an Internal Contact move your mouse over the BATS drop down which will display the work tile ribbon down
- Scroll to the right by clicking on the right arrow > on the far right of the ribbon and the tiles will move to the right until you see the Internal Contacts option
- "Click" on the Internal Contacts Tile

- Click "New"





- The * are required fields. The user will not be able to log in if you enter the information manually

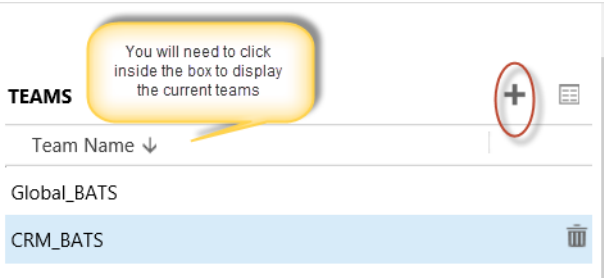
- User Name
  - Inside the State Government Network (SGN) the user name would be the user's single sign on ID (Ex: JoeS). You may also need to try the domain\UserID (Ex: ECLIENT\JoeS). Hit the "Tab" key and it will populate the rest of the employee's information for you.
    - If the information does not populate, something is incorrect with their Domain or UserID. Double check the information entered. If the problem continues you may want to check with your IT Department to verify the domin and or username.
  - 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.
- Save the user you just created

Assigning Users to Teams

Users who need the ability to assign reviewer or preparer to an Analysis will need to be associated to the Analysis Assignment Update Team

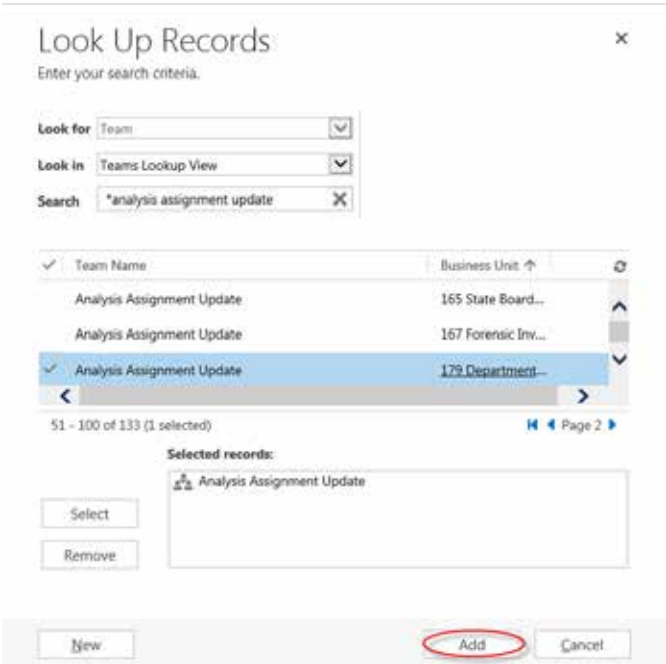
To assign a user to a team:

- "Click" on the Teams link on the far right of the screen
- Notice there is a team that has defaulted
- Click on the "Plus" sign to Add an additional team



- Click in the Team Name field and type in *analysis assignment update
  - Click on the magnifying glass to search for the "Analysis Assignment Update" team

  - Select the appropriate record in the results returned
  - -OR- select "Look Up More Records" at the end of the results. Select the appropriate option and click the check box (you will noticed that it is highlighted). If multiple options are available you may select more than one and then click "Select"
  - Click "Add"



Agency User Roles & Security

Agency and executive administrators will assign one or more roles to a user t provide access to specifc functions withing BATS.

BATS roles are additive. All users must be assigned to base role which provides basic functions. Some users will have one or two additional roles assigned to them while other users will have multiple roles assigned to them.

Quick Reference: BATS User Roles.

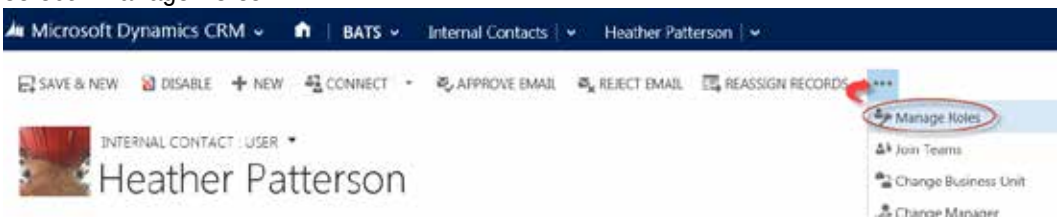
Agency User Roles & Security	BATS Agency User (base)	BATS Agency Analyst (additive)	BATS Agency Reviewer (additive)	BATS Agency Coordinator (additive)	BATS Agency Administrator (additive)	BATS Tracking User (additive)	BATS Team Tracking User (additive)
Agency Users	Yes	No	No	No	No	Yes	No
Agency Analyst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

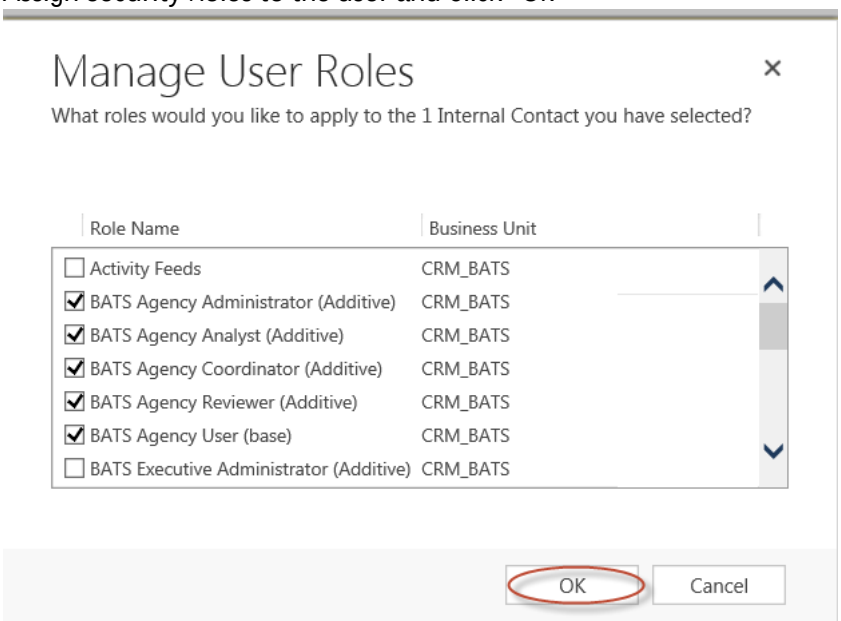
Bill Tracking Role	Agencies and OFM/GOV	Bill Tracking
BATS Tracking User (additive)	❖ Agency Analyst ❖ Agency Reviewer ❖ Agency Coordinator ❖ Agency Administrator ❖ Oversight Analyst ❖ Oversight Reviewer ❖ Oversight Coordinator ❖ Oversight Administrator ❖ Oversight Gov's Office	Additional role assigned 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.

Assigning Security Roles

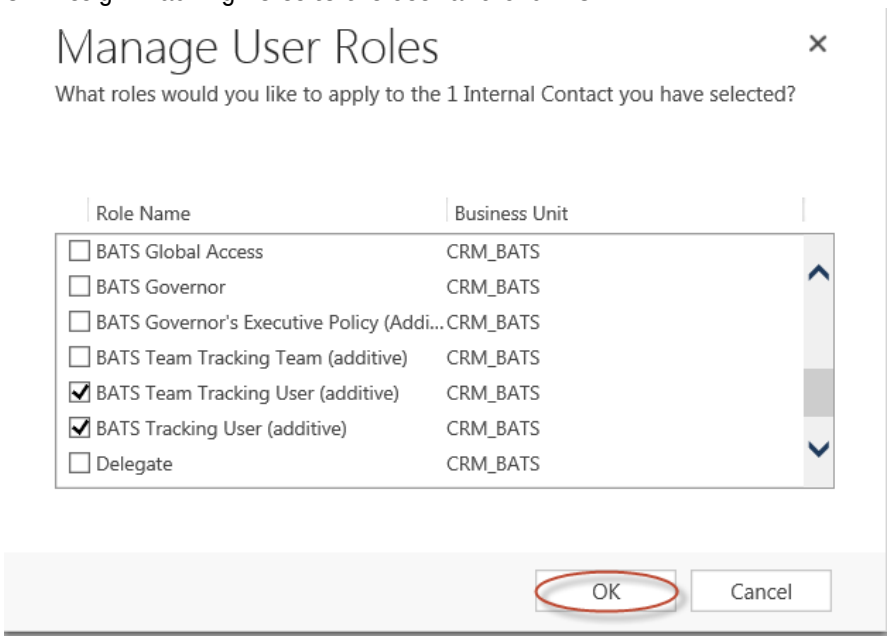
- Select the users(s) to whom you want to assign roles to and click on the three dots ••• to display additional menu options
  - Select "Manage Roles"



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



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



Disable & Enable User

You cannot delete a user but you can disable them

- Select the Internal Contact (User) you want to disable and Click “Disable “

- If you want to “Enable” the User, select the User and click “Enable”

External Contact

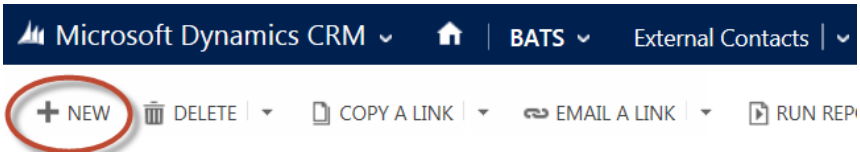
An External Contact is someone not using the system, usually another agency. Legislator have beenimported from LSC

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

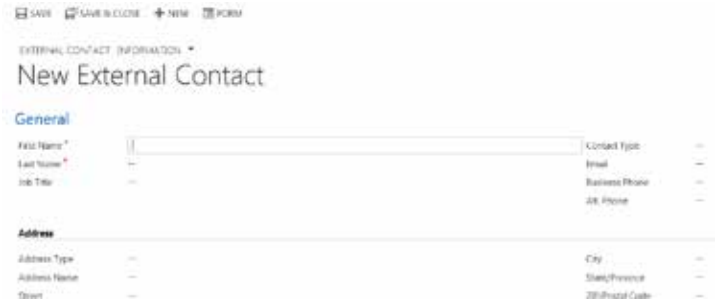
Creating An External Contact

- To begin creating an External Contact move your mouse over the BATS drop down which will display the work tile ribbon
- Scroll to the right by clicking on the right arrow > on the far right of the ribbon and the menu will move to the right until you see the External Contacts option
- Click on the External Contacts Tile

- Click "New"



- Enter the External Contact Information



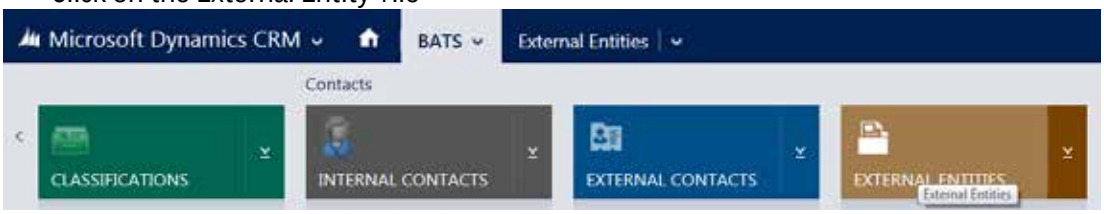
- Click "Save & Close"

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.

Creating An External Entity

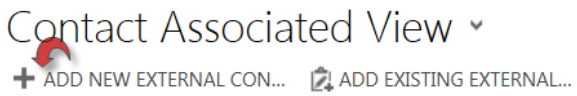
- To begin creating an External Entity move your mouse over the BATS drop down which will display the work tile ribbon
- Scroll to the right by clicking on the right arrow > on the far right of the ribbon and the menu will move to the right until you see the External Entity tile
- Click on the External Entity Tile



- "Click + NEW "
  - Enter the External Entity Information

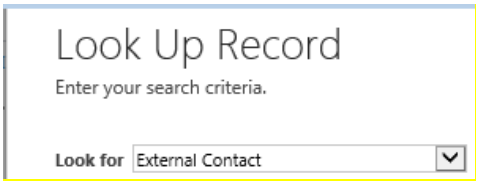
  - Click "Save"
  - To link an External Contact to an External Entity, click on the drop down menu and select External Contacts

  - Click "Add New Existing External Contact"



  - Click on the Magnifying Glass
  - Scroll down and click on the "Look Up More Records"
  - Verify that the Look for option is set to External Contact

- An External Contact can only be associated with a single External Entity



- Select your contact and click “Add”, this populates the Name on the New Connection screen
- Click “Save & Close”

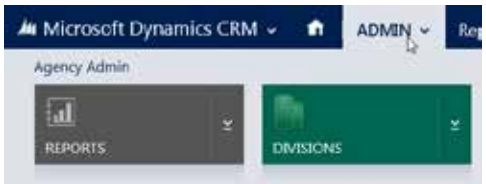
Divisions, Programs, Classifications

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 the drop down arrow on the Microsoft Dynamics CRM label on the top left of your screen & "Click Admin"

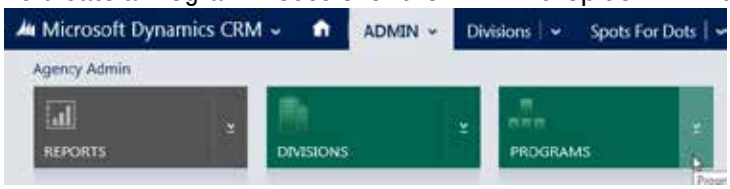
- To create the Division mouse over the ADMIN drop down which will which will display the work tile ribbon, "Click Divisions"



  - To create a new Division, "Click + NEW "
    - Enter the name of the Division and click "Save & Close"

Programs

- To create a Program mouse over the ADMIN drop down which will display the work tile ribbon, “Click Programs”



  - To create a new Program, “Click + NEW “
    - Enter the name of the Program and click “Save & Close”

You can assign one or more Programs to a Division, you can also assign a default Program Coordinator and up to five Reviewers to a Program.

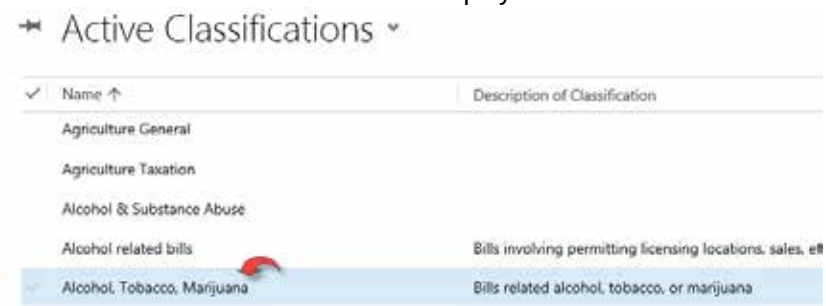
Classifications

Classifications are another way to categorize your bills into different buckets

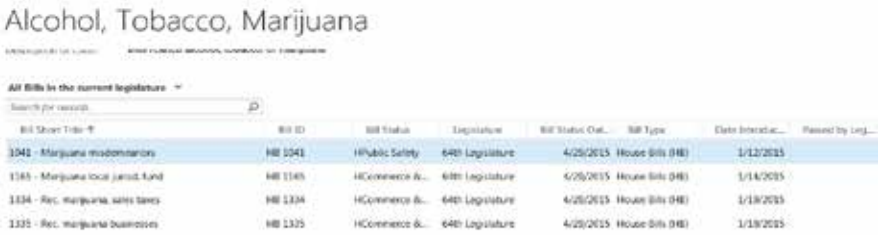
Only Agency Administrators can create Classifications

- To access/create Classifications mouse over the ADMIN drop down which will display the work tile ribbon, “Click Classifications”

  - To Access a Classification
    - Click on the Classification which will display the classification detail



    - Bills are displayed under the selected Classification



- To Create a New Classification, “Click + NEW”

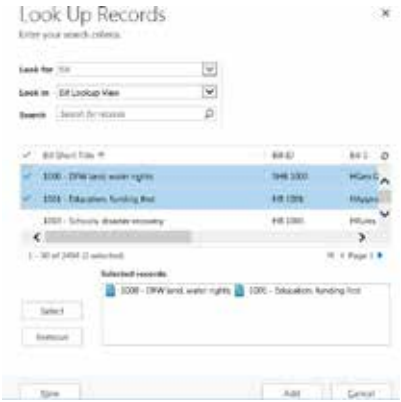
  - Name the Classification and click “Save”

You can add multiple bills to a Classification.

- Adding Bills to Classifiations
  - Click on the “+” sign in the All Bills in the current legistlature

  - Click on Magnifying Glass

  - Select the bill or bills and click Select to add to this Classification, click “Add”



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

Agency Requests

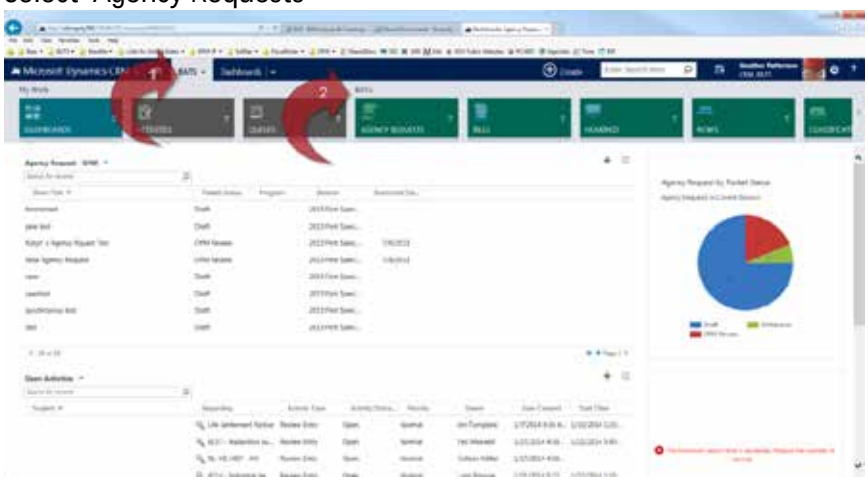
All cabinet agencies must submit Agency Legislation requests ("packets") to the Office of Financial Management (OFM) and the Governor's office for approval prior to that legislation being submitted for consideration by the legislature. The Bill Analysis and Tracking system (BATS) will be used to submit, review, and approve agency request legislation.

Accessing Agency Request

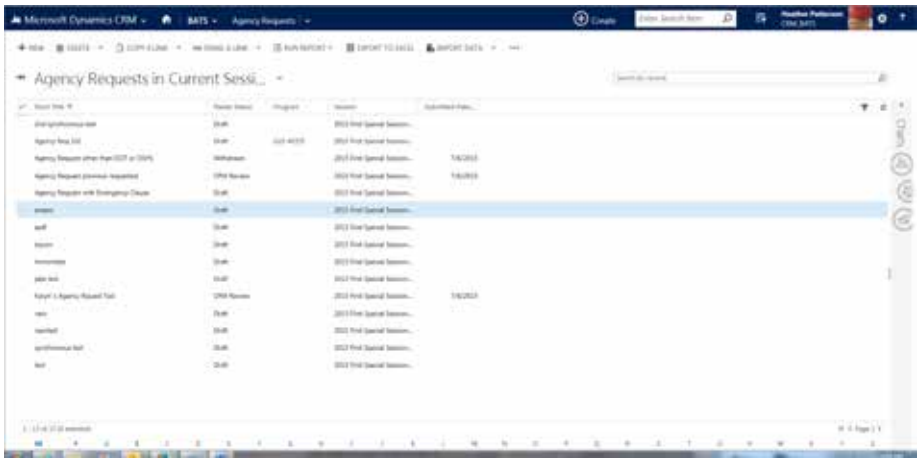
Agency requests are available from the BATS drop down in the top navigation bar

To access agency requests:

- Mouse over the BATS drop down in the top navigation bar, this will show the submenu options available
- Select Agency Requests



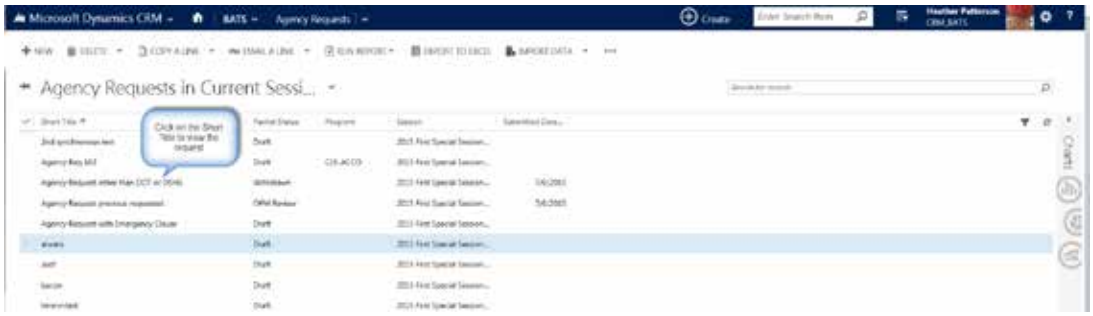
þ **Result**: Agency Request page opens. An error message will be displayed if the action is not allowed due to security permissions or system validation error.



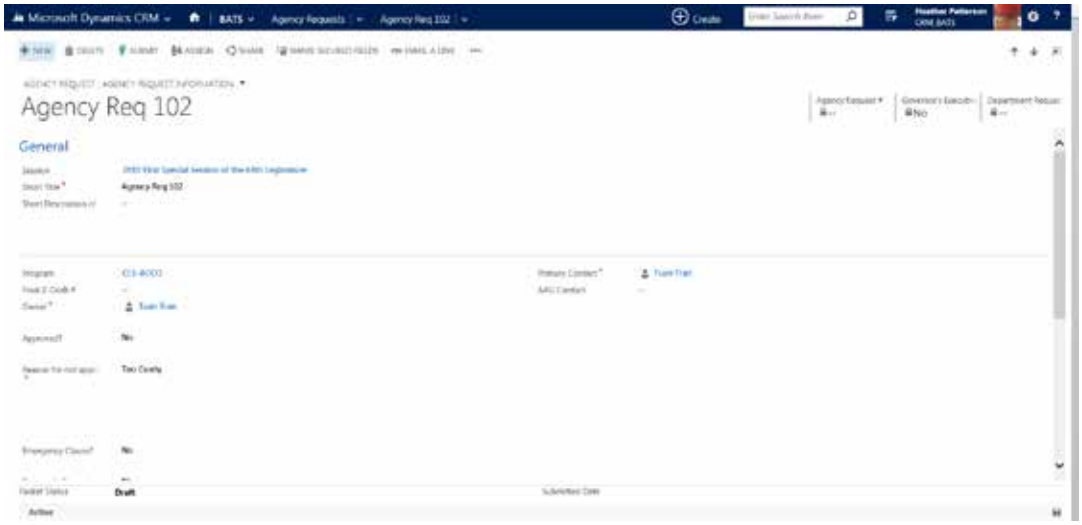
Viewing the Agency Request

From the Agency Request screen:

- Click on the Short Title



- After clicking on the short title a new window will appear



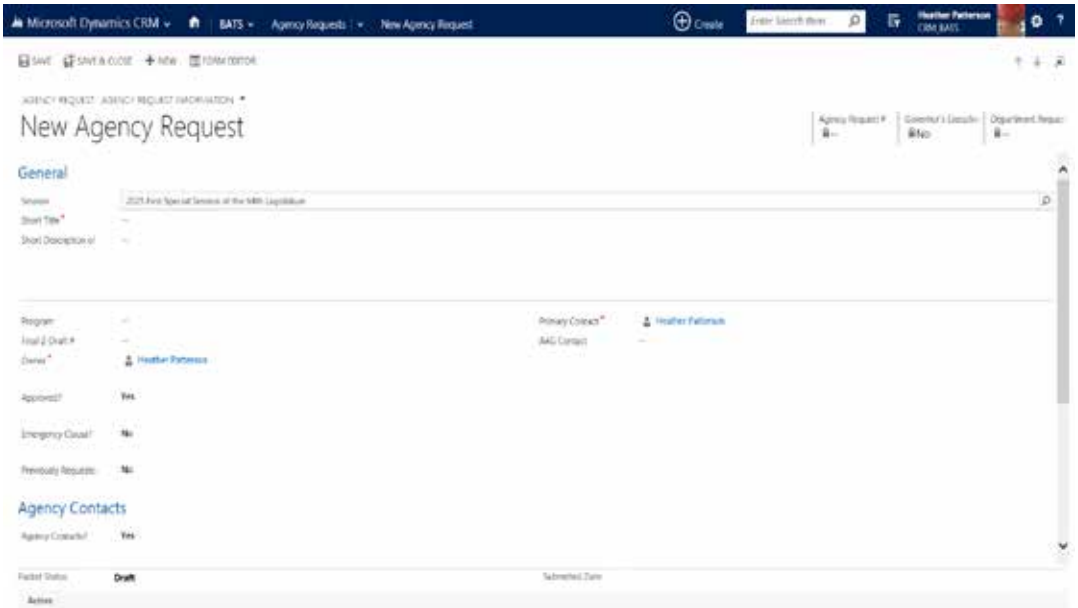
Create Agency Request

Only users with BATS Agency Coordinator permissions can create an Agency request

To create a new request:

- Click on the + NEW

- The New Agency Request screen will open



- The required fields are: Short Title, Owner & Primary Contact. This is also noted on the screens by a red astrik(*). Please remember that more information is required from OFM but are not necessarily a system required field. Examples of this are: Final Z Draft #, AAG Contact, Short Description of the Proposal & Session
- Enter all the information you can, as always the more information provided the better
- After all the information has been added click "Save"

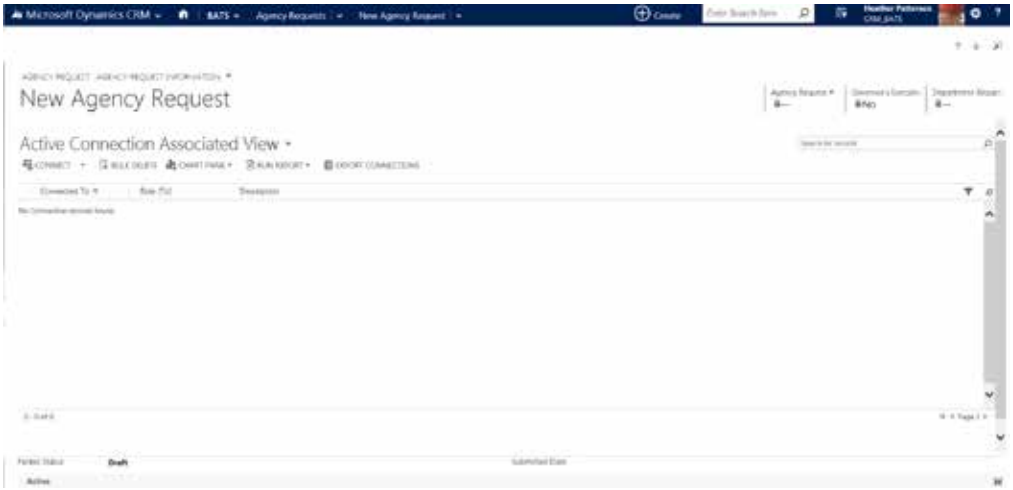
Add Contacts

- Change Agency Contacts From No to Yes

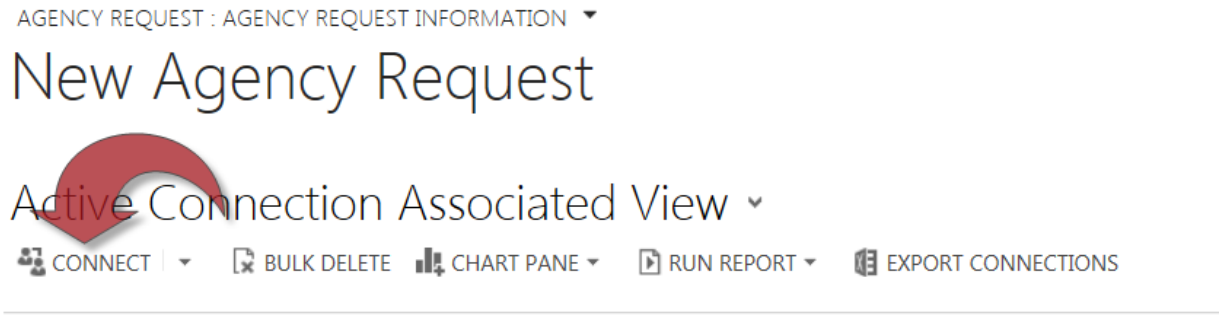
- Notice that the Contact Icon has appeared on the far right

  - Click on the Contact Icon

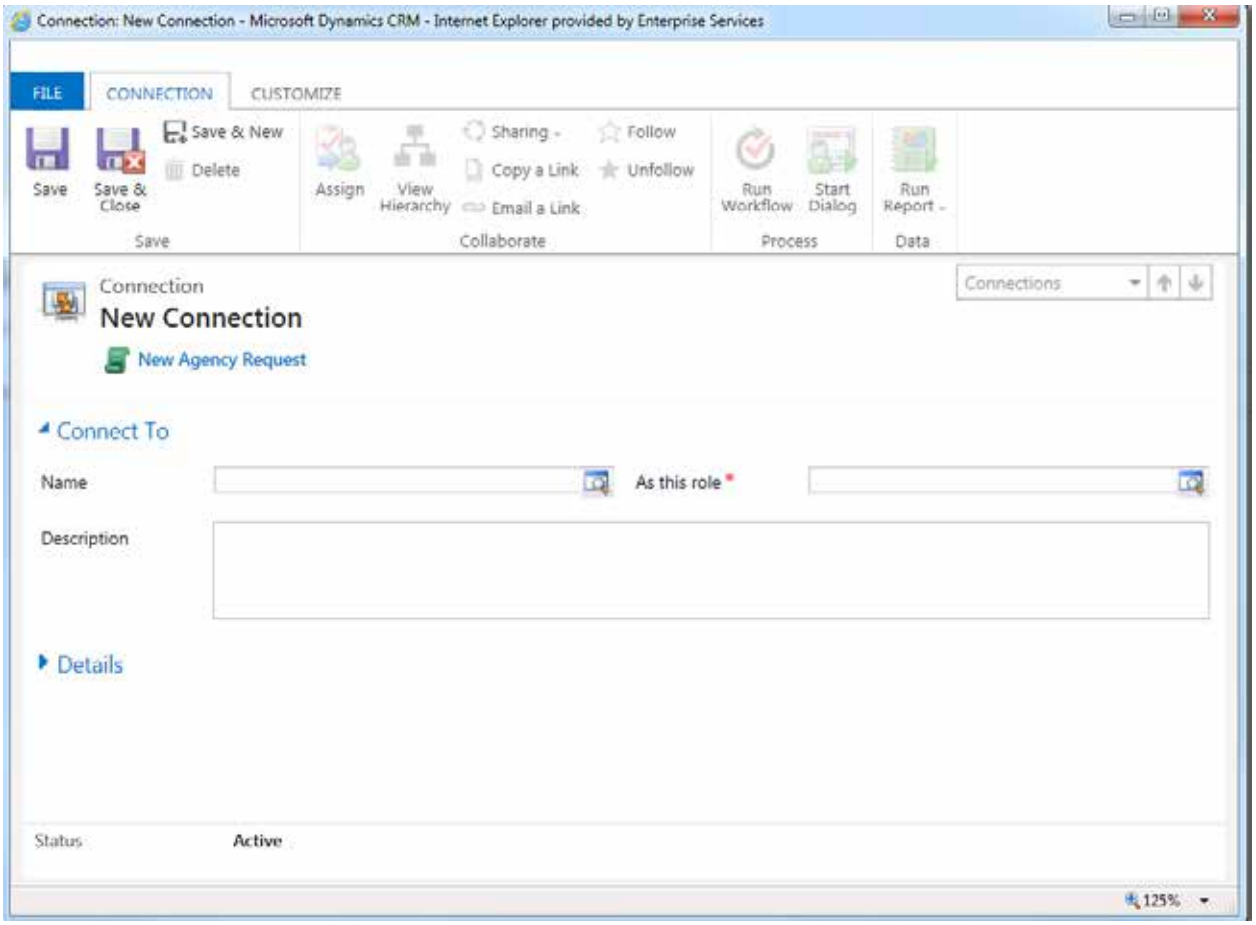
  This will bring you to the Active Connection Assoiciated View



  - Click on the Connect Drop Down



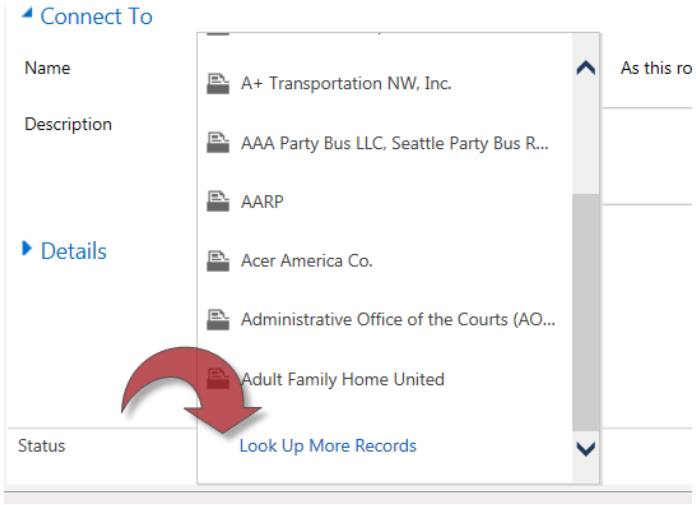
The “New Connection” Window will open as pop up window



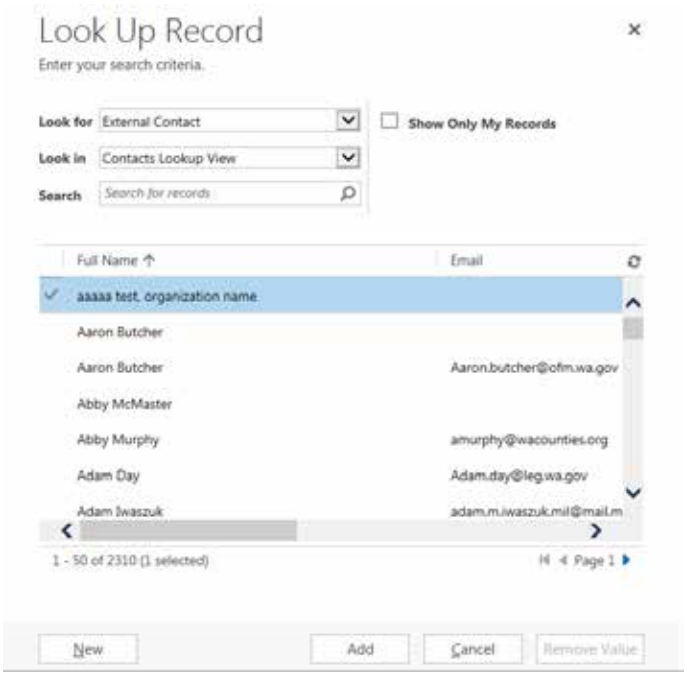
- Type a name in the Name field or utilize the look up function.
  - If the name is not found the Look Up Record screen will appear and help you to search for the user you are trying to connect the request to. For more information on how to use the Look Up Record Screen please see below.

Using the Look Up Record Screen to find the person you want to connect the Request to.

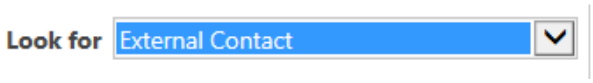
- Click on the search icon
  - This will return the first 10 records in the External Contacts list, scroll to the bottom and click on the Look Up More Records link



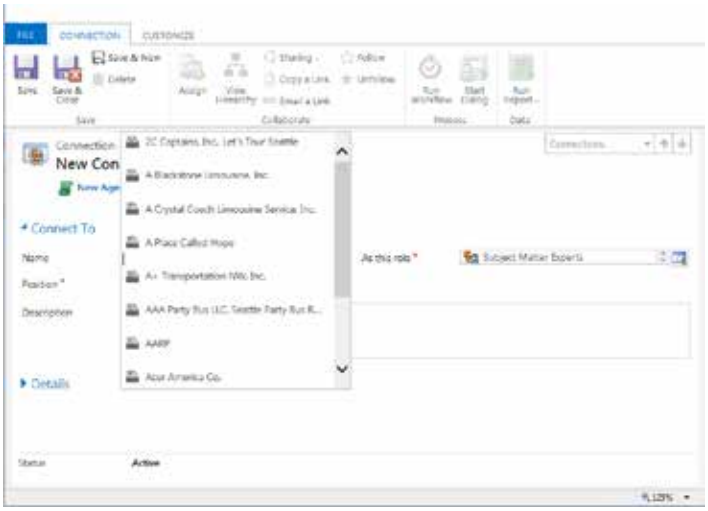
- The Look Up Record Screen is returned as a new window



- Select the correct Contact Type for the person/entity you are searching for. The menu is defaulted to the external contact list.



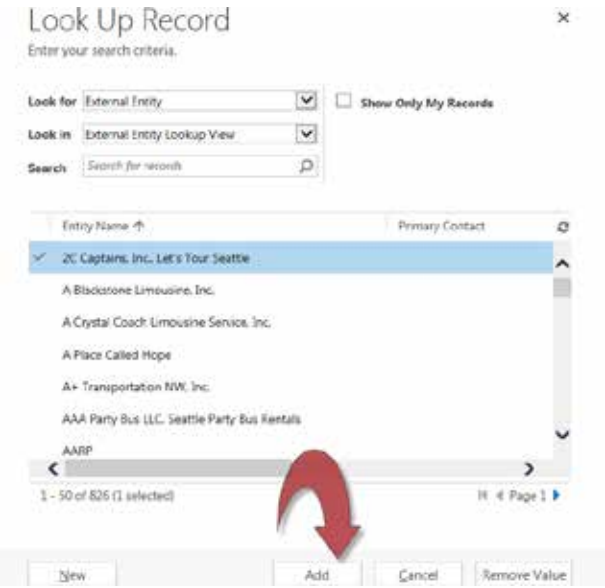
When you have selected the type of contact you are searching for you'll notice the user table populates with your request. You can scroll and page through these results to find the contact and click on the user name to choose them.



To further reduce your search options you can type a partial or full name in the Search field

You may only choose **1** user at a time.

- Select the user and "Click Add"

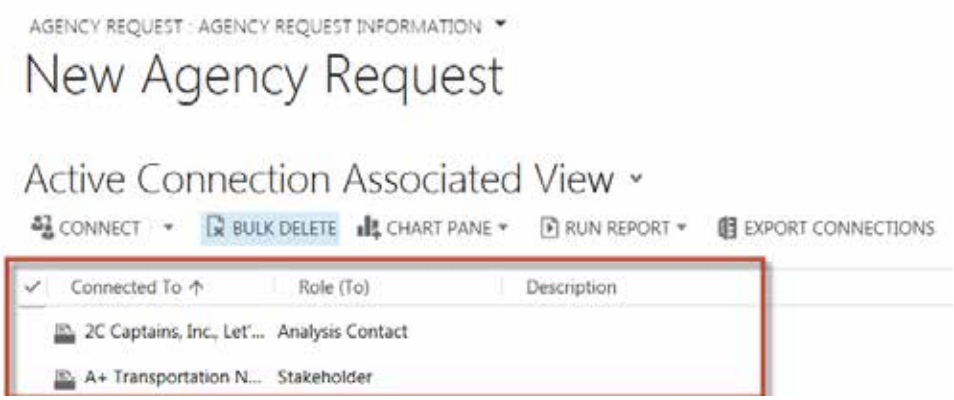


Once you've added the Contact you be returned to the New Connection window.

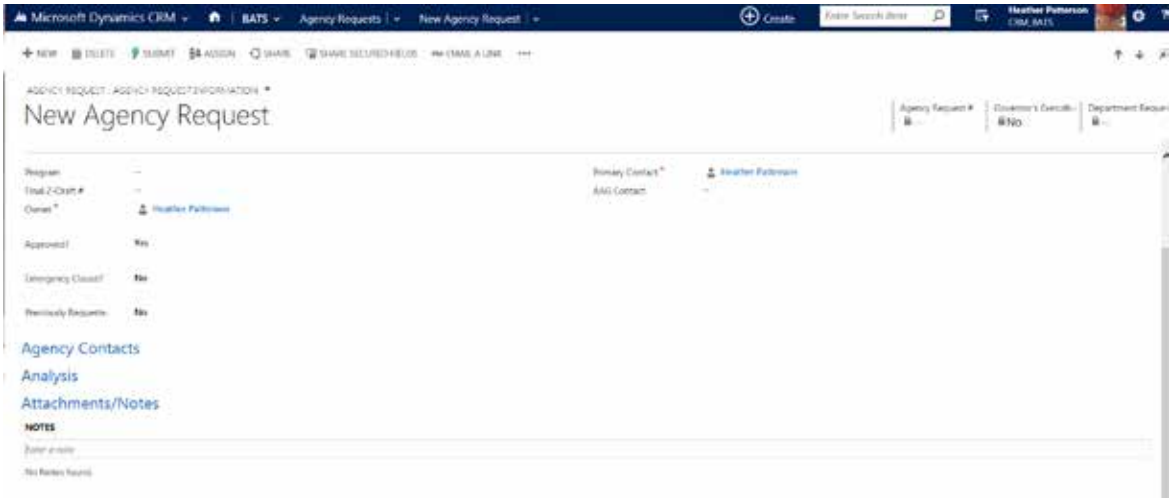
- Now you need to add the role they will fulfill for the request
- You may add a role by typing or using the look up feature as you did in the Contact Name
- Add the role using the magnifying glass

- Click “Save and Close”

The new contact will appear on the Active Connection Associated View



- Repeat the add contact process until all contacts have been added
- Return to the New Agency Request by clicking on the New Agency Request in the Navigation Bar



If you would like to attach an analysis or any notes you may now do so. Please note that any analysis attached will be for your agencies internal use only and will NOT be sent to OFM.

Adding a Note

From the New Agency Request Screen

- "Click Atttachments/Notes" to expand the Note section

- Click in the Notes box where it says *Enter a note*, this will expand the notes window and you'll notice it now has an option to also attach a note.

- Type in your notes and attach any attachments
- "Click Done"

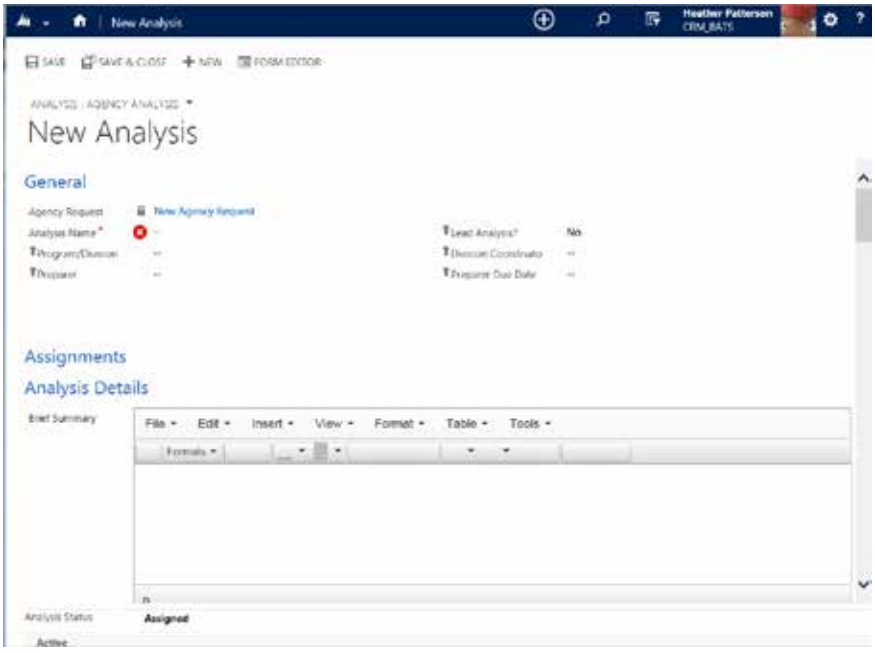
Your notes are save and appear in the Notes section

Attaching An Analysis

- Click the Analysis link which will expand the Analysis window

- Click on the + to the far right

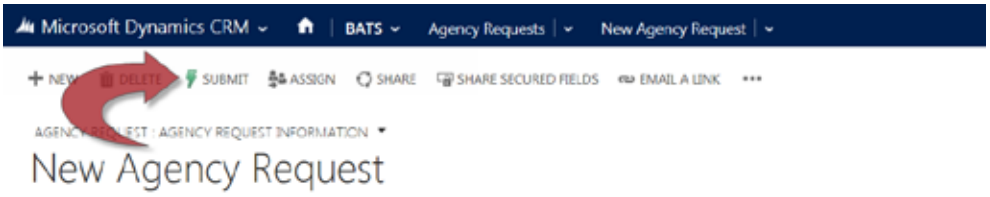
This brings up the New Analysis Window



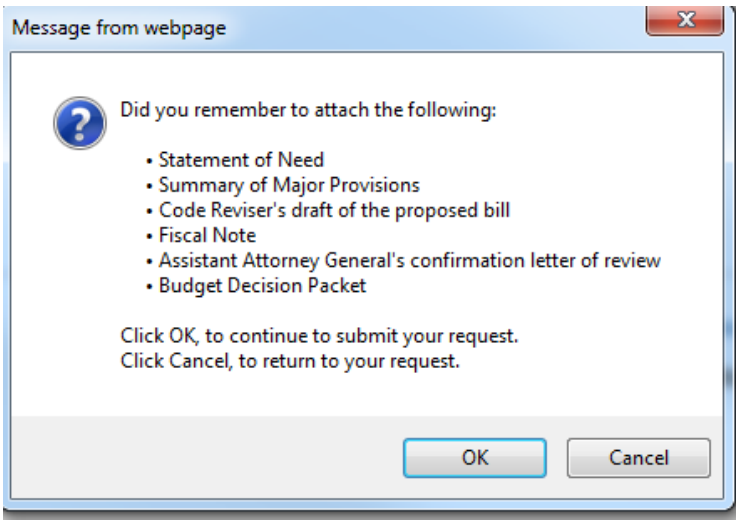
- Fill out the New Analysis form. Please see the New Analysis Section here

Now that you have completed all sections of the New Agency Request you are ready to submit it to OFM.

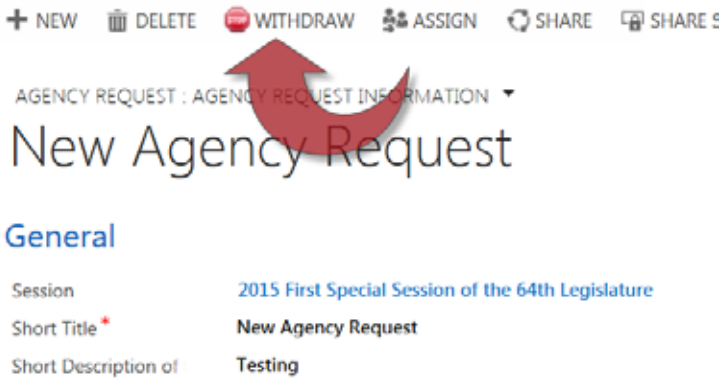
- "Click Submit" in the Menu Ribbon at top of the page



- The system will automatically validate the request to ensure all information needed is present. If you receive an error you will need to update any missing fields.
- The system will ask you if you have included the expected information, click OK



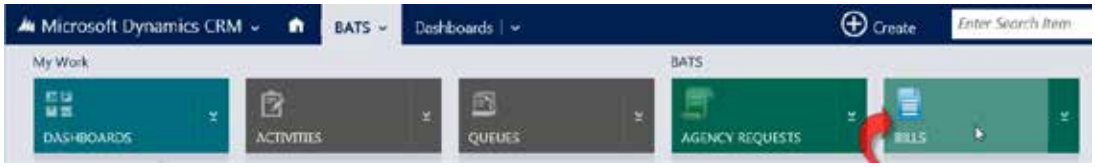
- The packet status will change to OFM Review and you'll see the submit button change to a withdraw



To make changes to the Analysis you will need to Withdraw the Agency Request

Bill Tracking and Analysis

- "Click Bills" in the Work Tile Ribbon to show Bill Screen

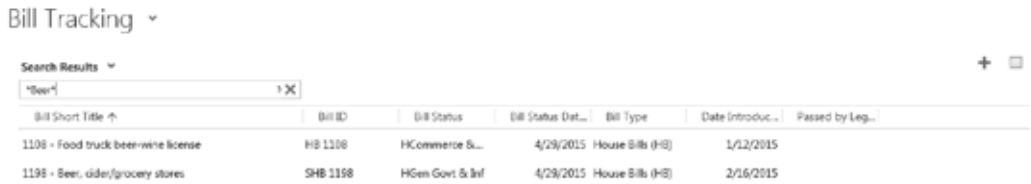


Notice the multiple views

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

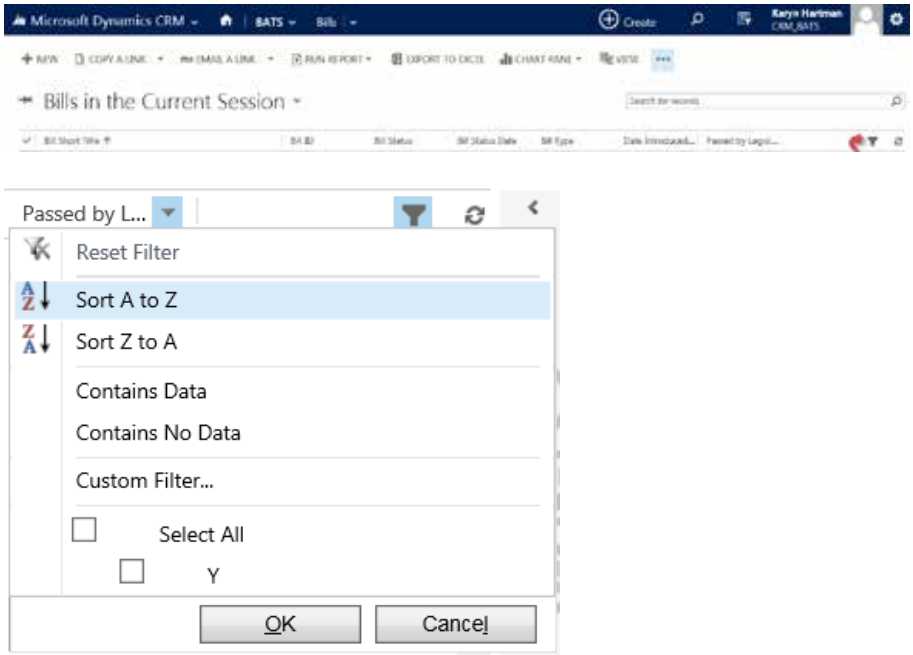
Search

- 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

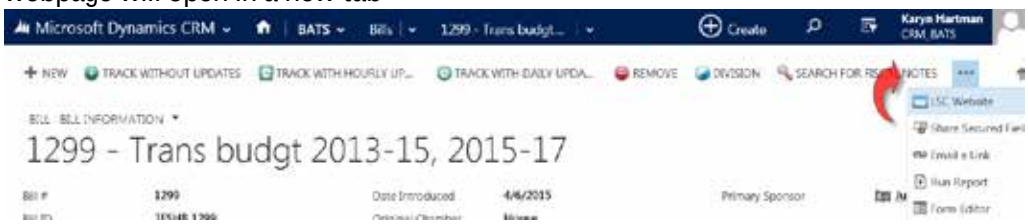
Bill Elements

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

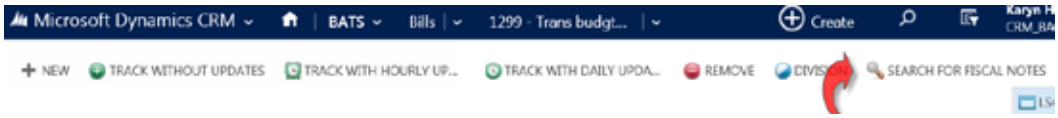
Things to know

- 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. The webpage will open in a new tab



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

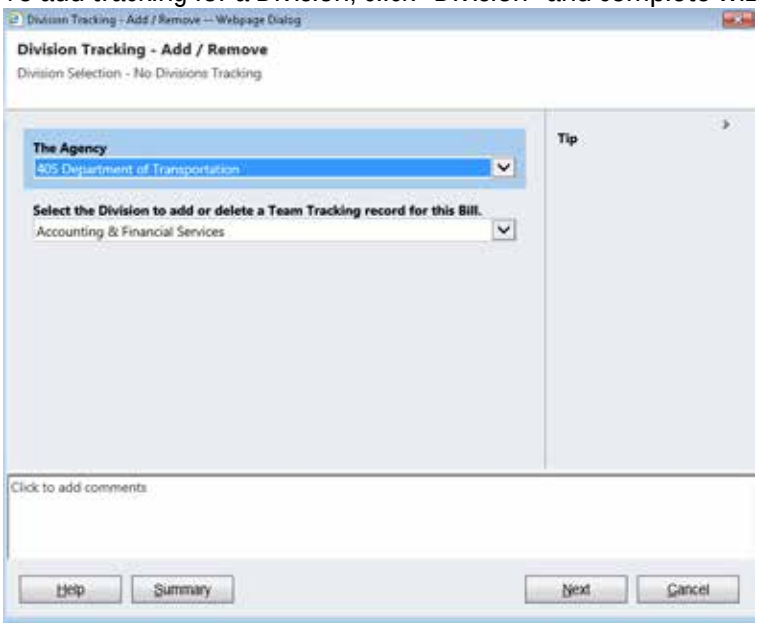


o Bill Tracking options in top Ribbon Bar

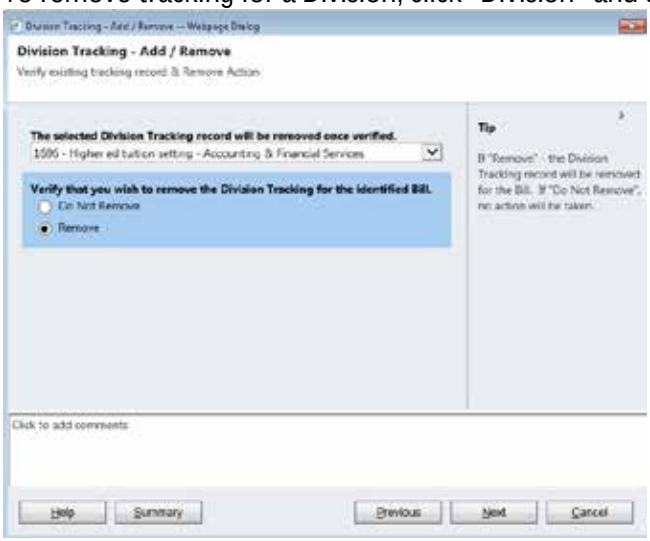
- Bill Tracking - Track for individual user (Based on Tracking Role assigned)
  - Select the Update Options you would like to track with

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

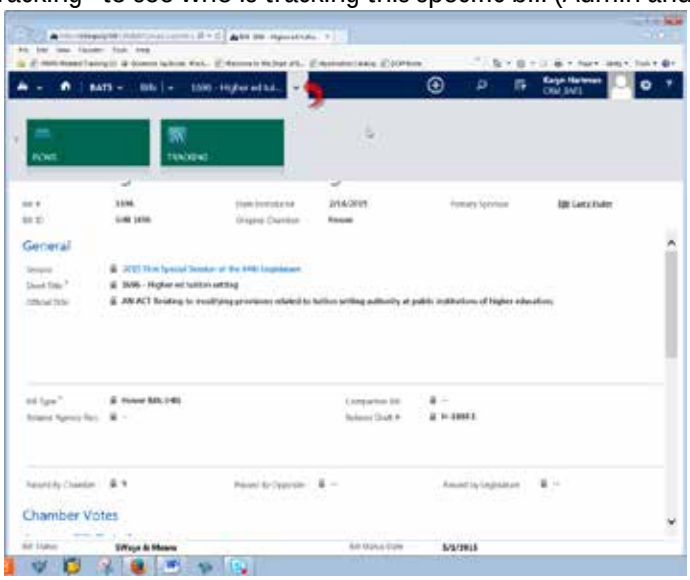
  - To add tracking for a Division, click “Division” and complete wizard



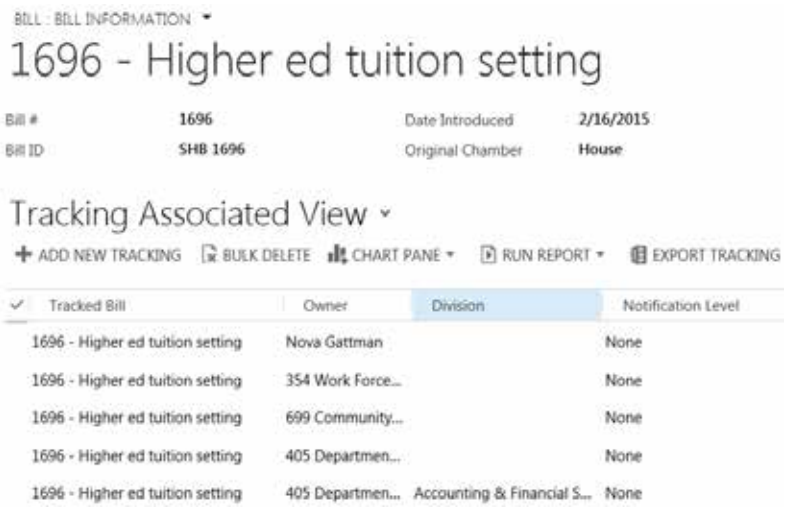
- To remove tracking for a Division, click “Division” and complete wizard



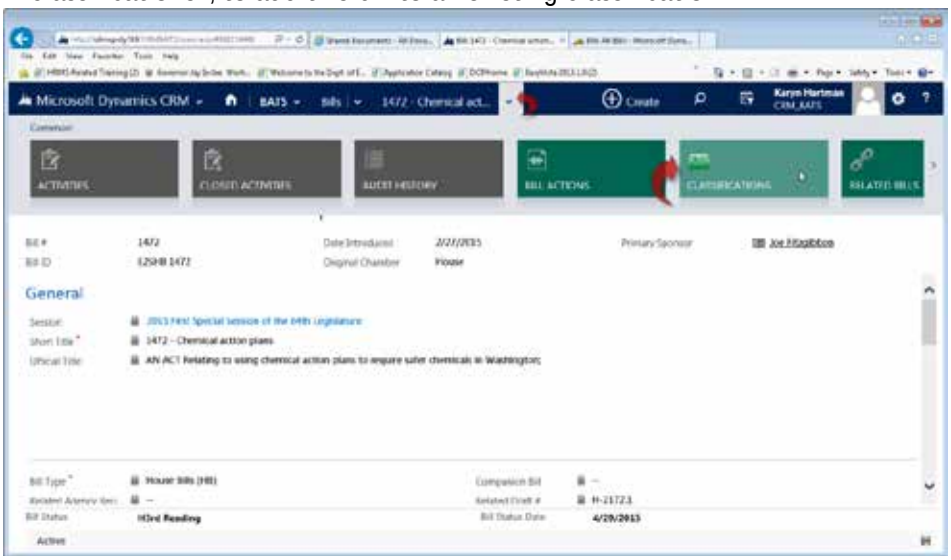
o “Click Tracking” to see who is tracking this specific bill (Admin and Coord Roles only)



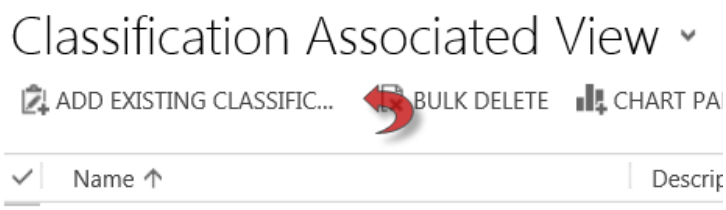
- Now you can view who is tracking this bill



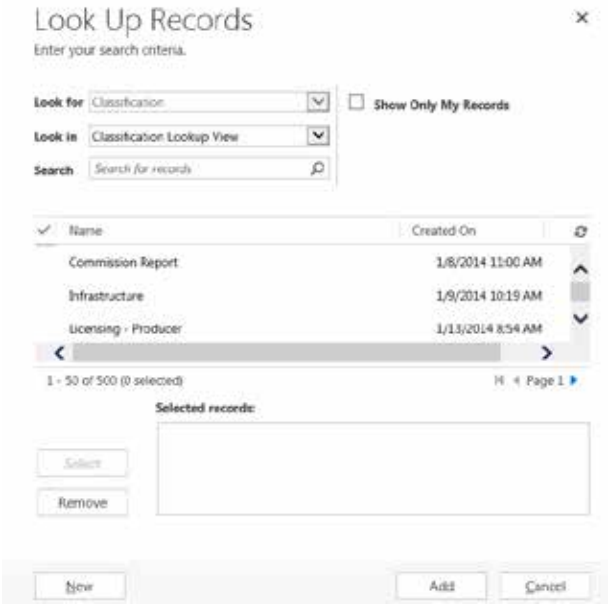
- Click “Classifications”, to add this bill to an existing Classification



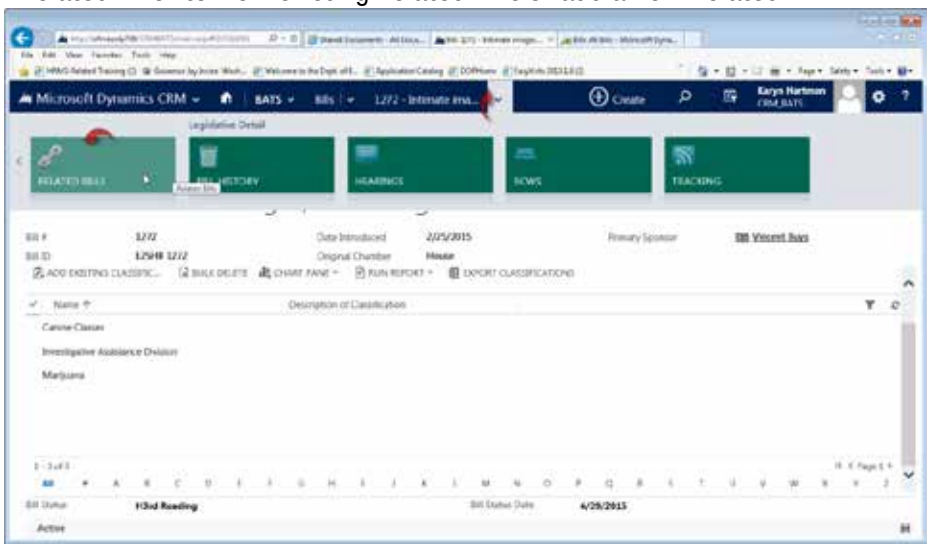
- Click “Add Existing Classification”



- Select the Classification by typing in the Name Box or click on the magnifying glass on the far right of the Name Box to bring up the Look Up Records window

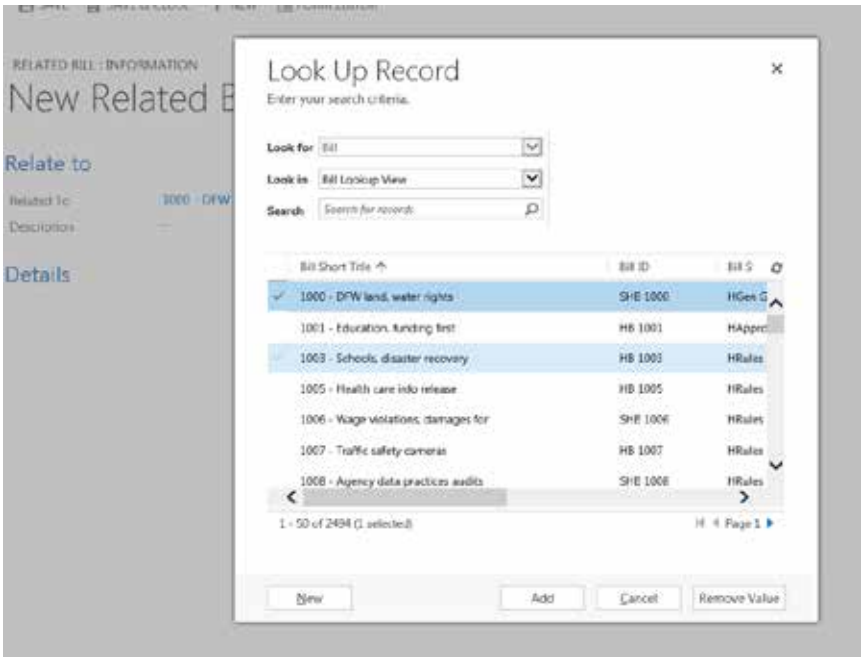


- Click on “Related Bills” to view existing Related Bills or add a new Related Bill

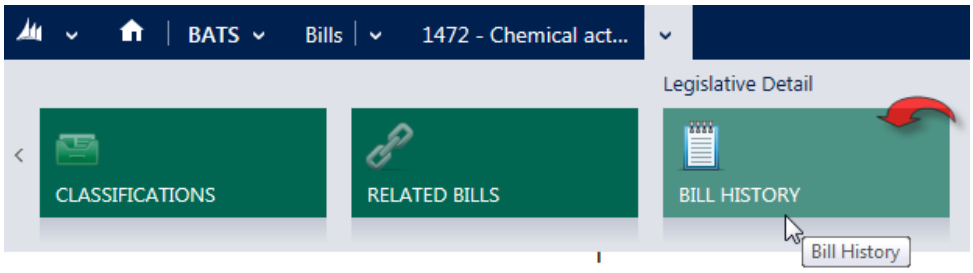


- To add a new Related Bill, click in the box, and click “Add New Related Bill”

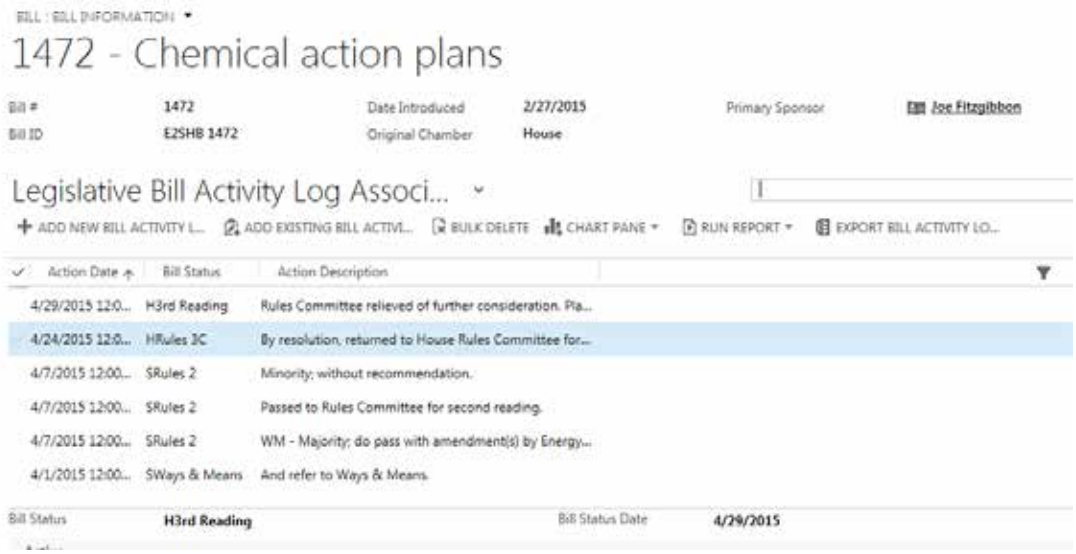
- Click Related Text box and click on the lookup button, select the bill to relate and click “Add” then Save & Close the record



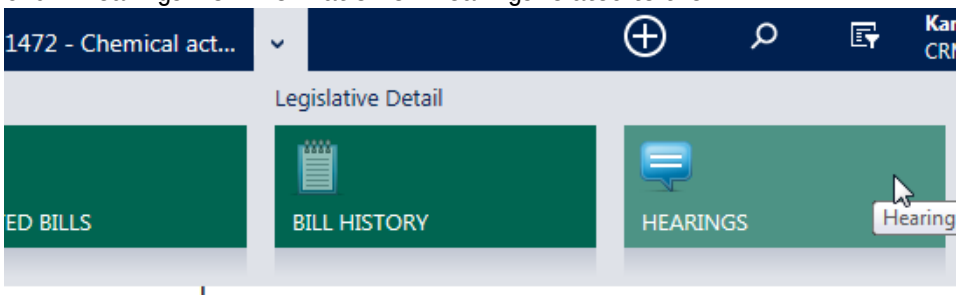
- To view the Bill History via the Navigation Bar for details on changed versions of the Bill



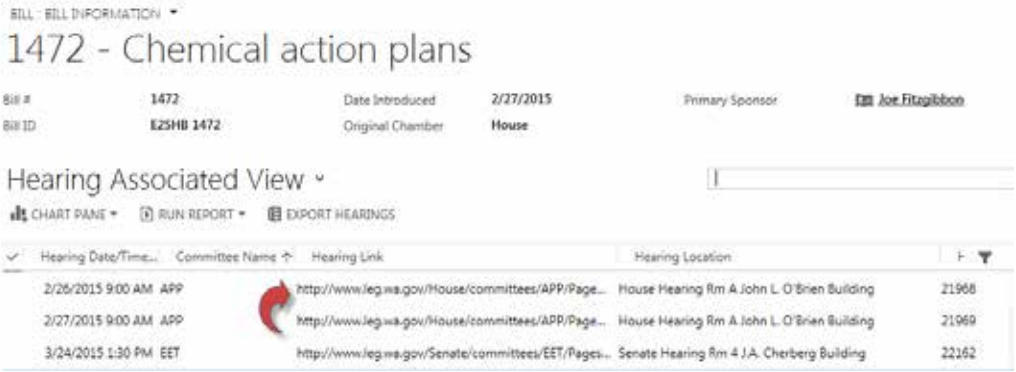
- Now you can view the history of the bill



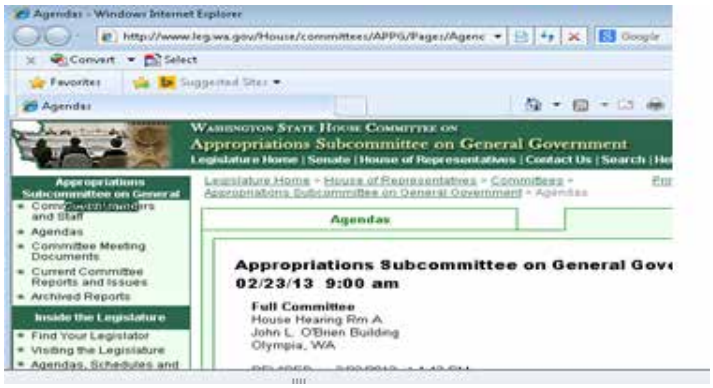
o Click “Hearings” for information on Hearings related to the Bill



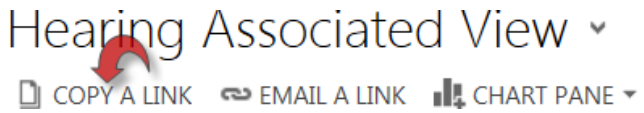
- Click the Hearing hyperlink to open the LSC Web Page



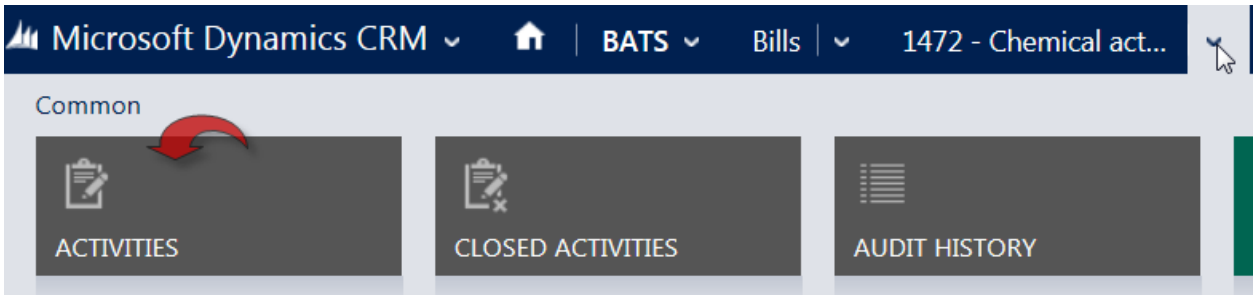
- **T**he LSC Web Page opens in a new window and provides the hearing details



- Click Back on the BATS Hearing Page
- Select the hearing and Click “Copy A Link”

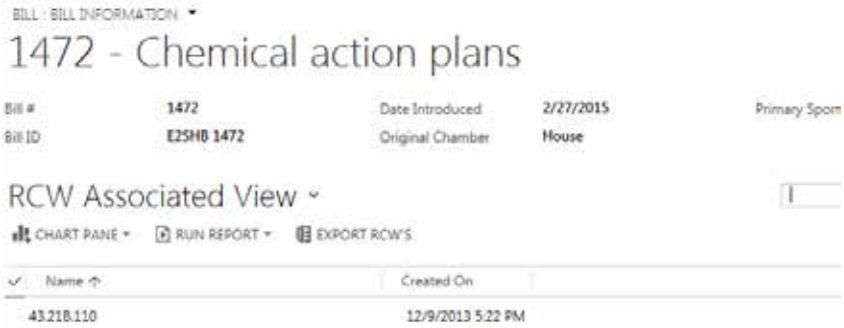


- Click on the Down Arrow & Select “Activities” from the Work Tile Ribbon



- Click the “New Activity”
- Select Appointment
- Fill in the details
  - Paste the previously copied link into the subject or description
- Click Save
- If appointment for a hearing changes, you will receive an email notification.
- RCW’s (Left Nav)

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

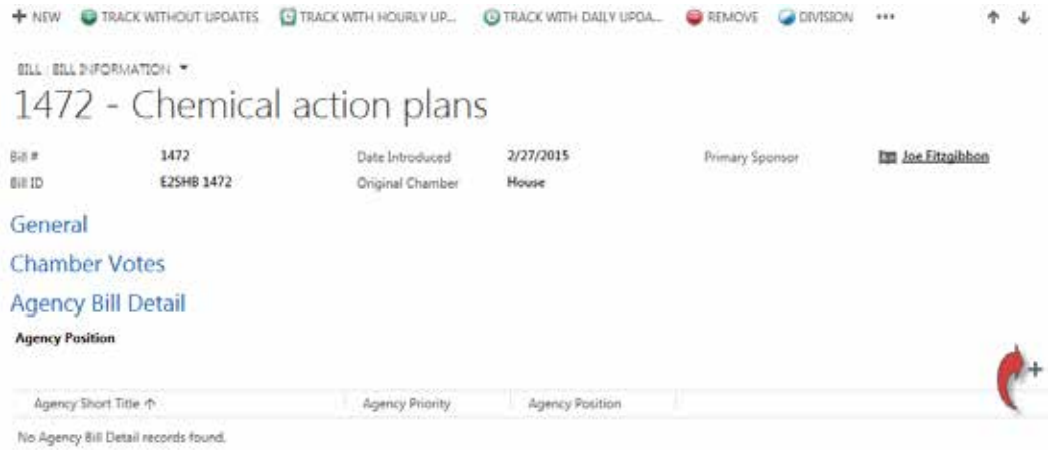


  - Click the weblink in the top Ribbn Bar for RCW information

- The RCW Detail will open in a new tab

- Scroll down to the Agency Bill Detail section for Agency Bill Details, including Agency Position

  - Click in the "Agency Bill Detail" box to activate section
  - Click on the Plus sign to add a new Agency Bill Detail on the far right of the Agency Bill Detail section



  - Fill out appropriate fields & click save

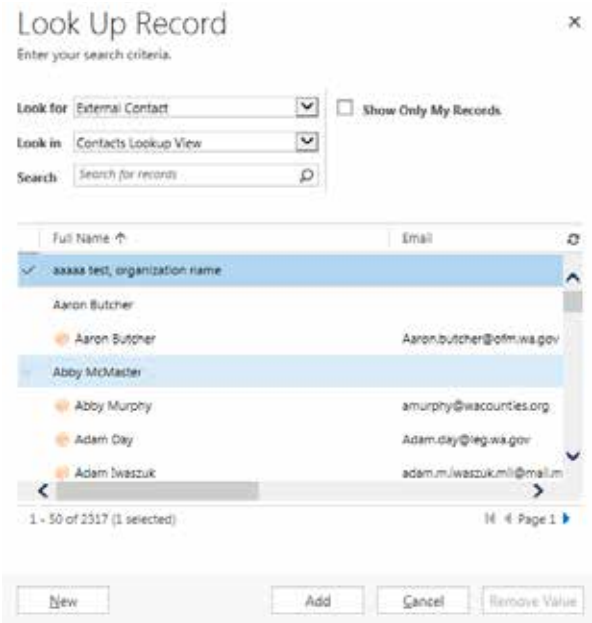
You may want to come back to this part after your agency is done with the Analysis to update position and priority

Agency Contacts

- Scroll down to the Agency Contacts section for Agency Contact details
- Click on theRecords Icon to add a new Agency Contact on the far right of the Agency Contactl section

- Click "Connect"
  - 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.

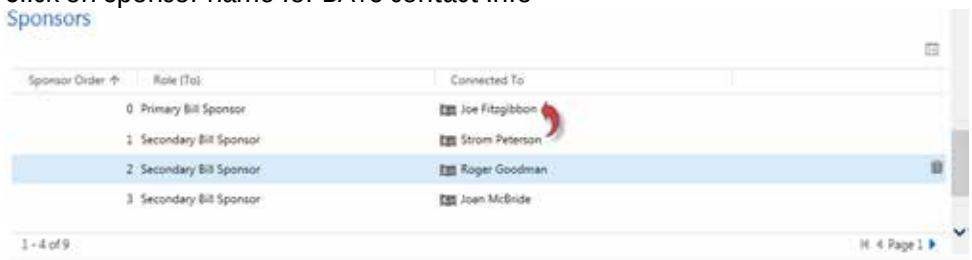


  - Click "Save & Close"

- Sponsors

Sponsors are imported from LSC and <u>cannot</u> be changed

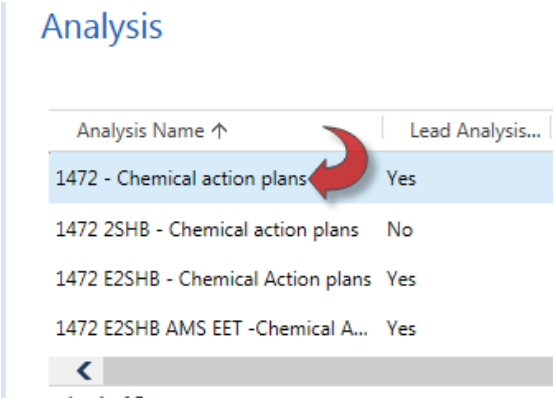
- Scroll down to the Sponsors section for Sponsor details
- Click on Sponsor name for BATS contact info



Create Analysis

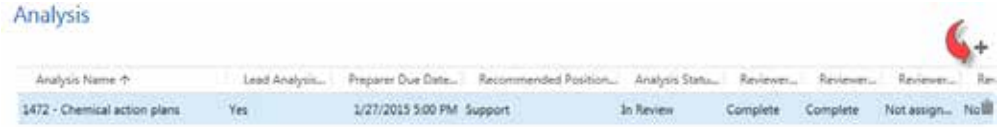
To view or create an Analysis scroll down to the Analysis Section

- View An Existing Analysis
  - To view an Analysis, click on the Analysis name

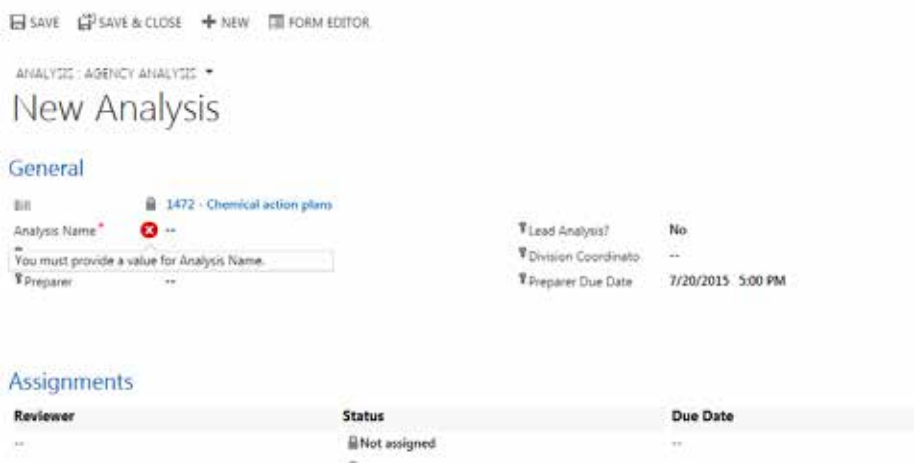


Each bill can have multiple Analysis

- **Create A New Analysis**
  - To add a new Analysis click the plus sign



- Populate the necessary data
  - Analysis Name, Program and Division
  - 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
  - Click Save & Close

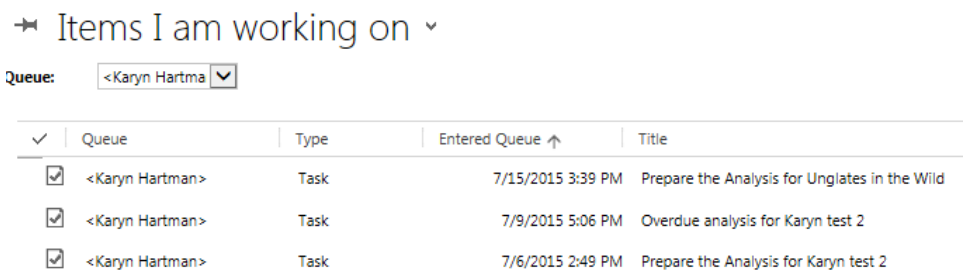


Since the Bill # doesn't change, you might want to name your Analysis the version of the Bill. It will be up to your agency to come up with your own naming convention.

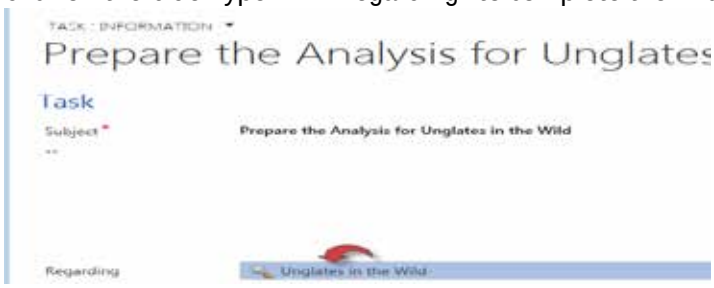
Prepare Analysis

Queues are used to create or manage actions (task or assignments) such as an agency preparing or reviewing Analysis

- Navigate to the Queue screen by selecting Queue from the BATS drop down, this will show all the items in your queue
- Click on the title of the queue item to open it



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

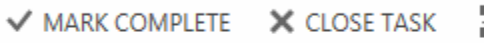


- Click "Start Analysis" in the top Ribbon Bar

ANALYSIS : AGENCY ANALYSIS

- 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" to verify Analysis
- Click "Ready for Review" to assign Analysis review to first reviewer
- Mark your task complete



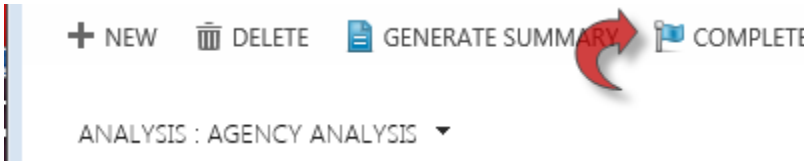
TASK : INFORMATION

Review Analysis

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

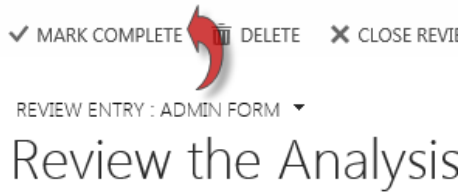
- Click on the "blue hyperlink" (Analysis name) to review

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



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



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).

Advanced Find

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

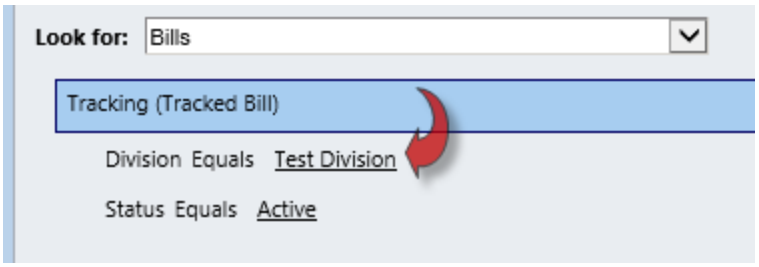
Informational YouTube Video Link - http://www.youtube.com/watch?v=5ogrbdj_vfw

- Select an existing view that is similar to the results you are looking for

For this example, the "Bills Division A is Tracking" view is used

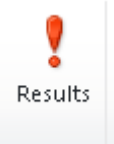
- Click on the "Advanced Find" Button

- Mouse over the underlined selection

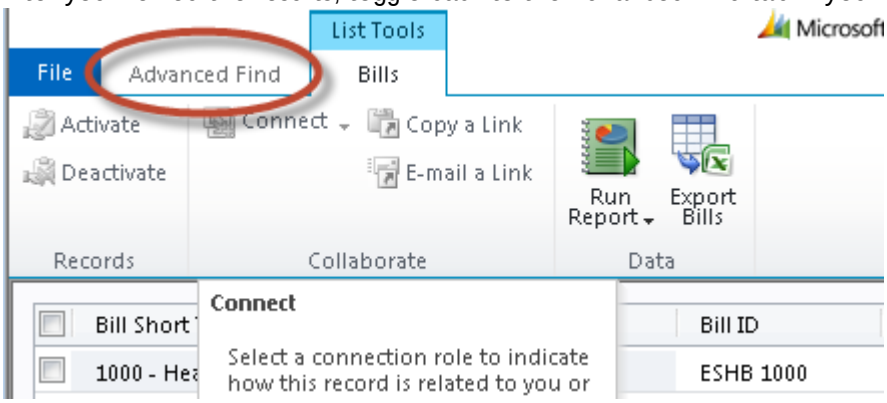


- Select the lookup icon to find the Division you want to display in your view

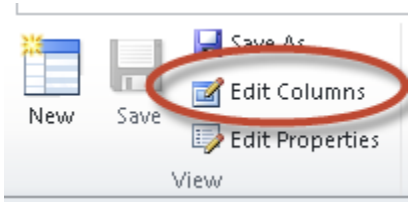
  - Double click the Division you want to add
  - In the selected records box, click on the exisiting division to remove and click "Remove"
  - Click "Add"
  - Click on the "Results" Icon in the top Ribbon Bar to view



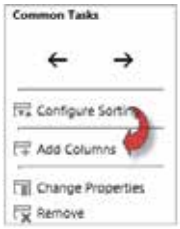
- After you viewed the results, toggle back to the Advanced Find tab in your top Ribbon Bar



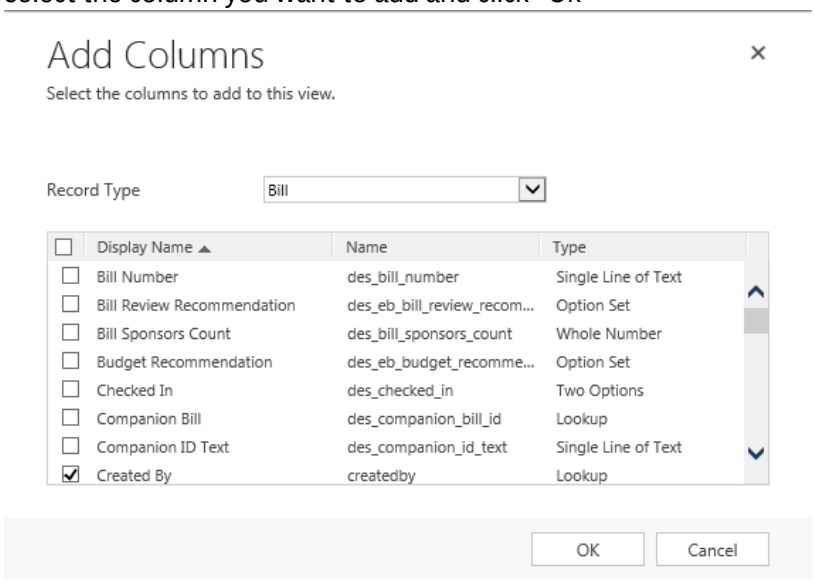
- Click on the "Edit Columns" icon to format columns



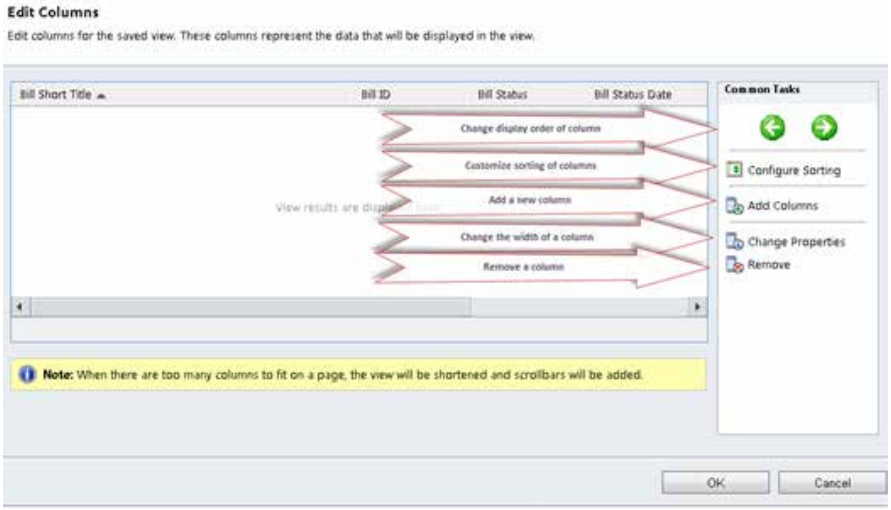
- Click on the "Add Columns" button to add additional columns



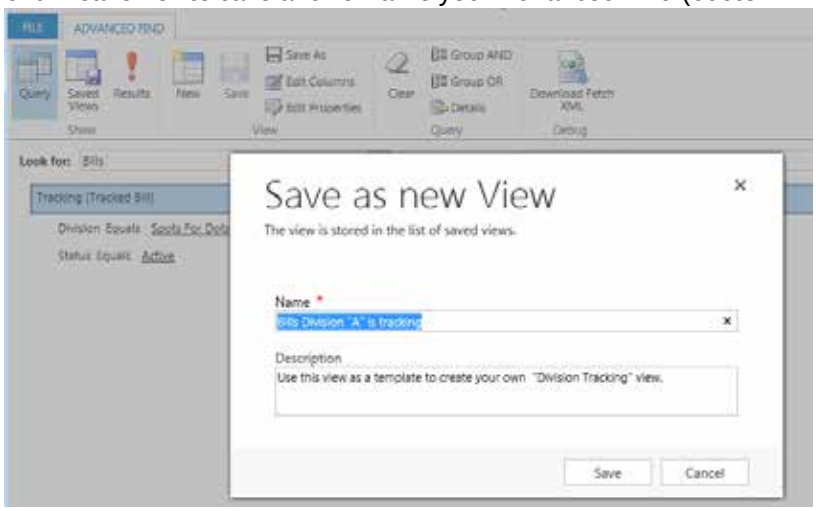
- Select the column you want to add and click "Ok"



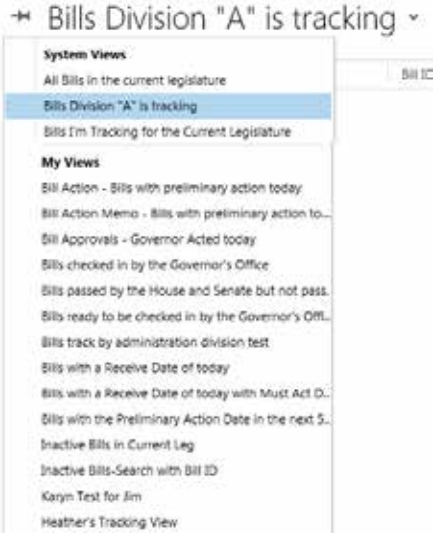
- Additional column options



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

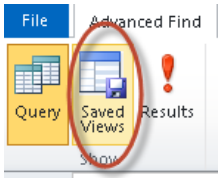


- Close the Advanced Find window and click "Bill's" in the left nav. In your views dropdown menu you will now see your saved Custom View under my views.

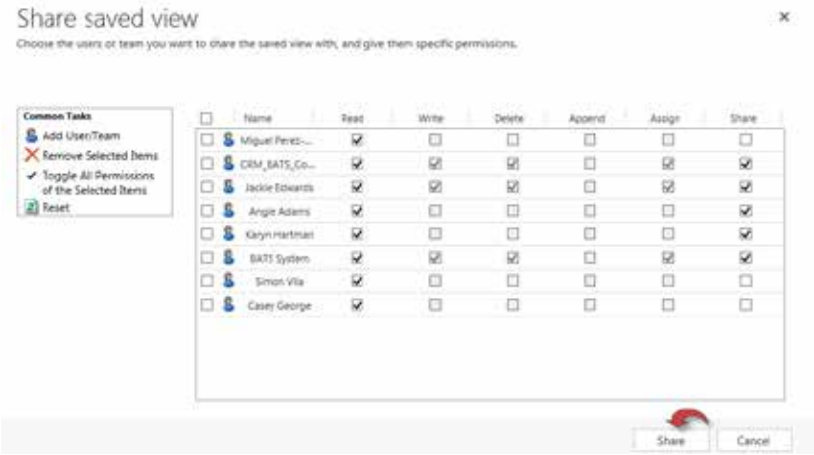


Share a Personal View

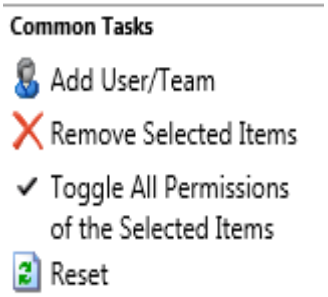
- Click on the “Advanced Find” button in the top Ribbon Bar
  - Select “Saved Views” in the top Ribbon Bar to display existing Custom Views

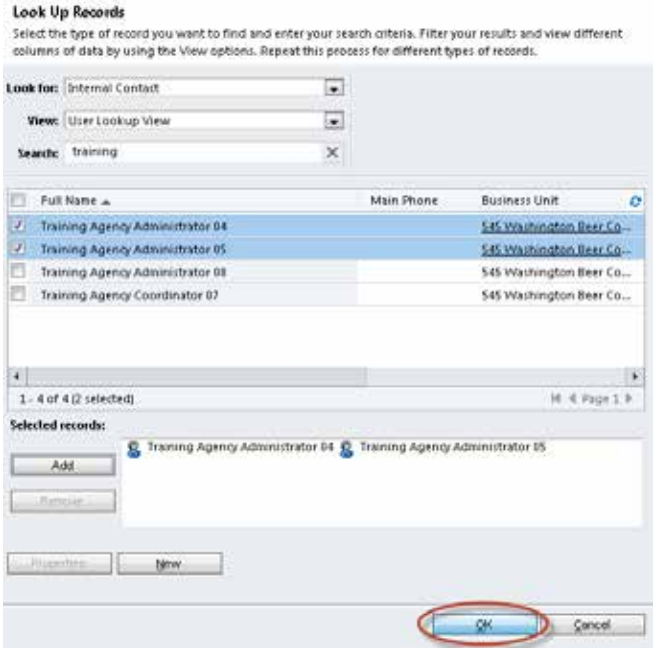


  - Check the box next to the view you want to share and click “Share”

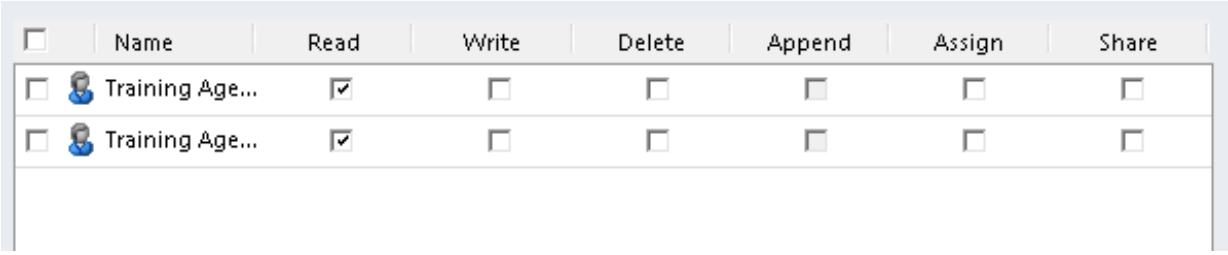


  - Select the team/user you want to share with. Select the users to share with, click “add” and click “Ok”



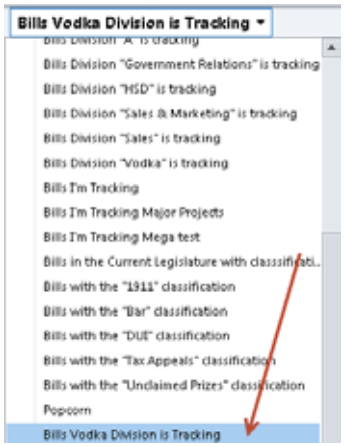


- Select the view permissions for each user or team

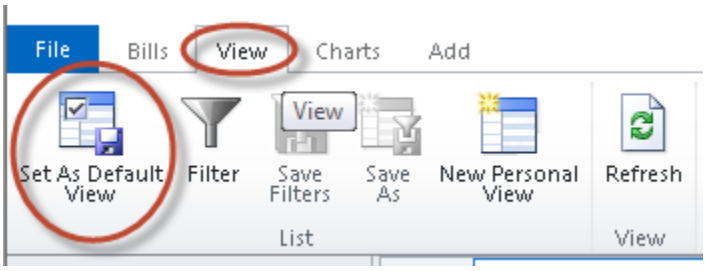


If you give a user the right to delete, append or write, they will have ability to change the view for everyone who is using that view.

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



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

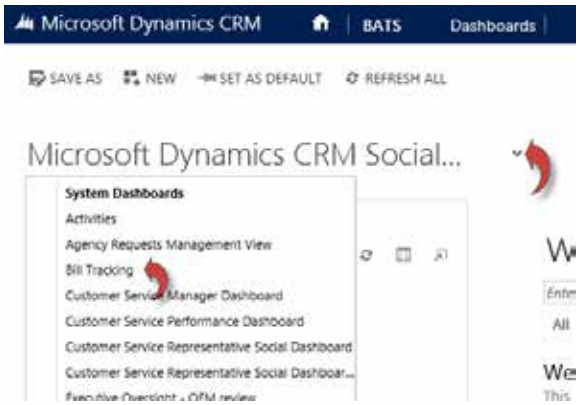
Dashboards provide the user with quick access to information or common tasks

- 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

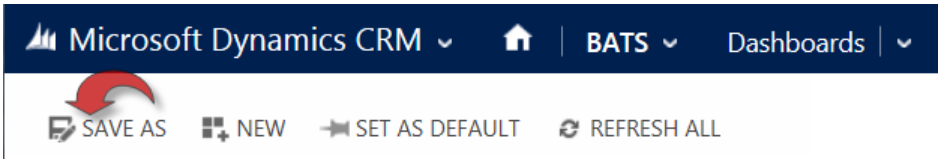
YouTube Video Link - http://www.youtube.com/watch?v=RriGGfypMOM

Customizing an existing Dashboard

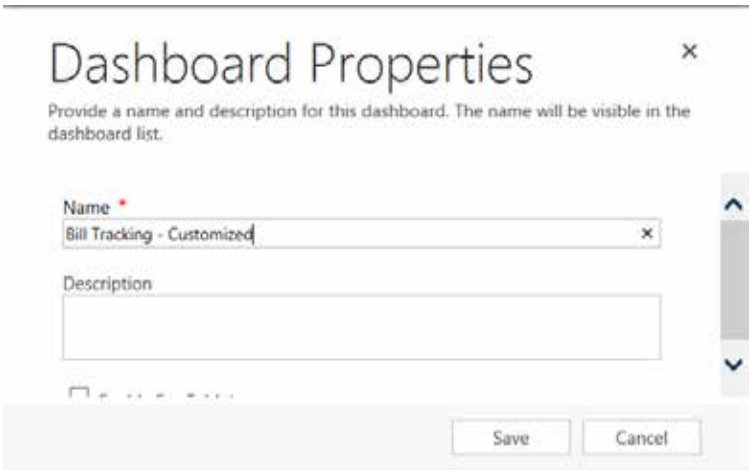
- Select the "Bill Tracking" Dashboard



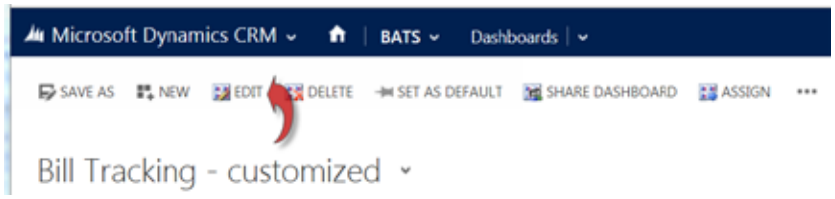
- Click on the "Save As" button located in your top Ribbon Bar



- Name your Dashboard and click "Save

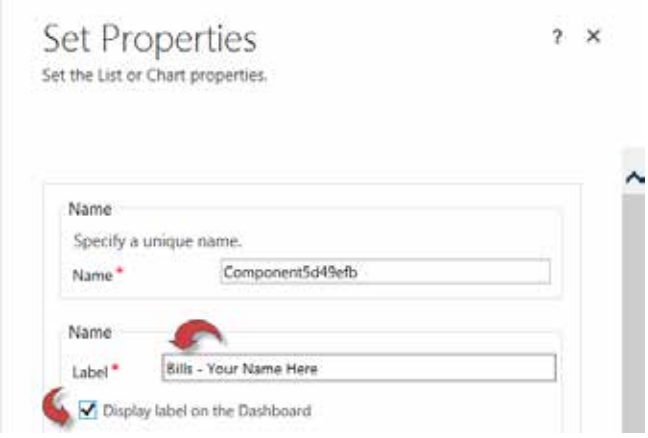


- Click the “Edit” button located in your top Ribbon Bar

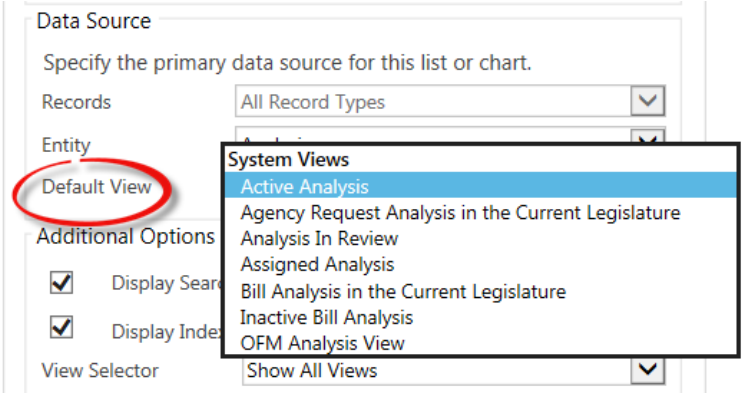


- Click on the Component (list, view or graph) you want to customize and click “Edit Component” in top Ribbon Bar

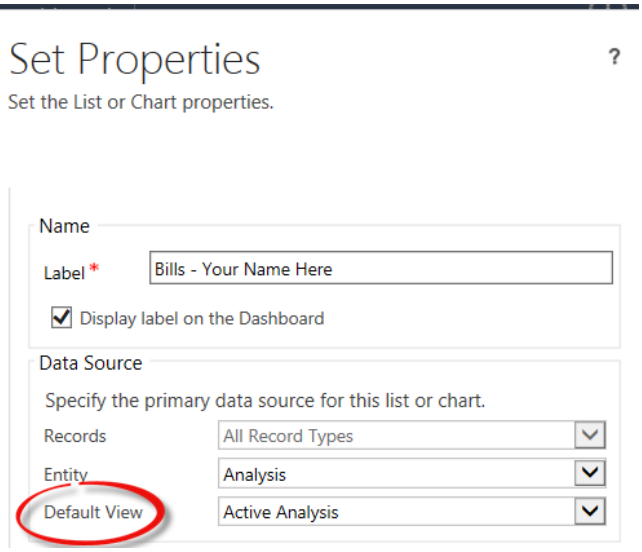
- Change the name of the Label for this component to display in the component header & check the Display label on the Dashboard



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

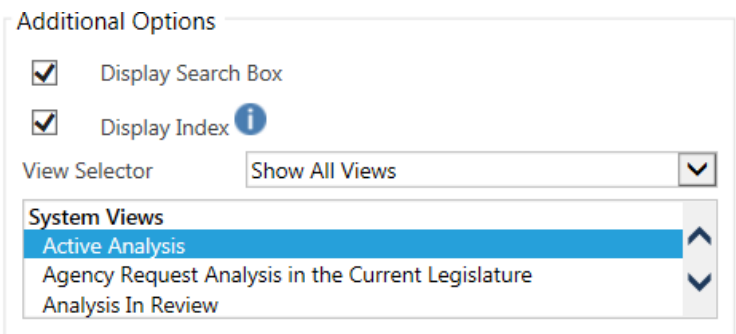


- Select the Default View from the drop down list

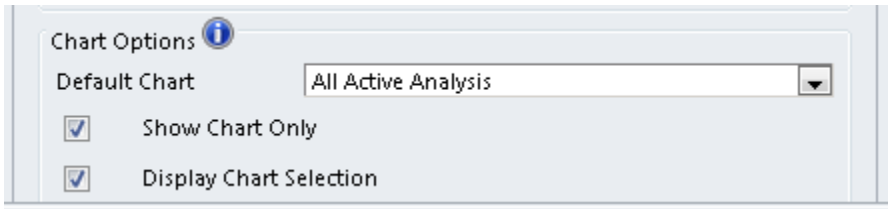


- Select the additional views you would like to have available for this entity

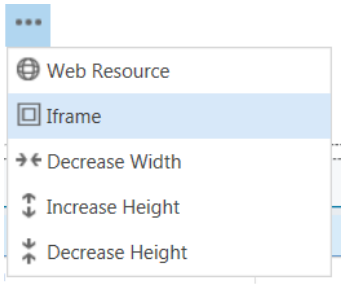
From the View Selector drop down list you can choose "Show Selected Views" to choose multiple views. Use the "Ctrl" key to select multiple views under the View Selector or Show All Views.



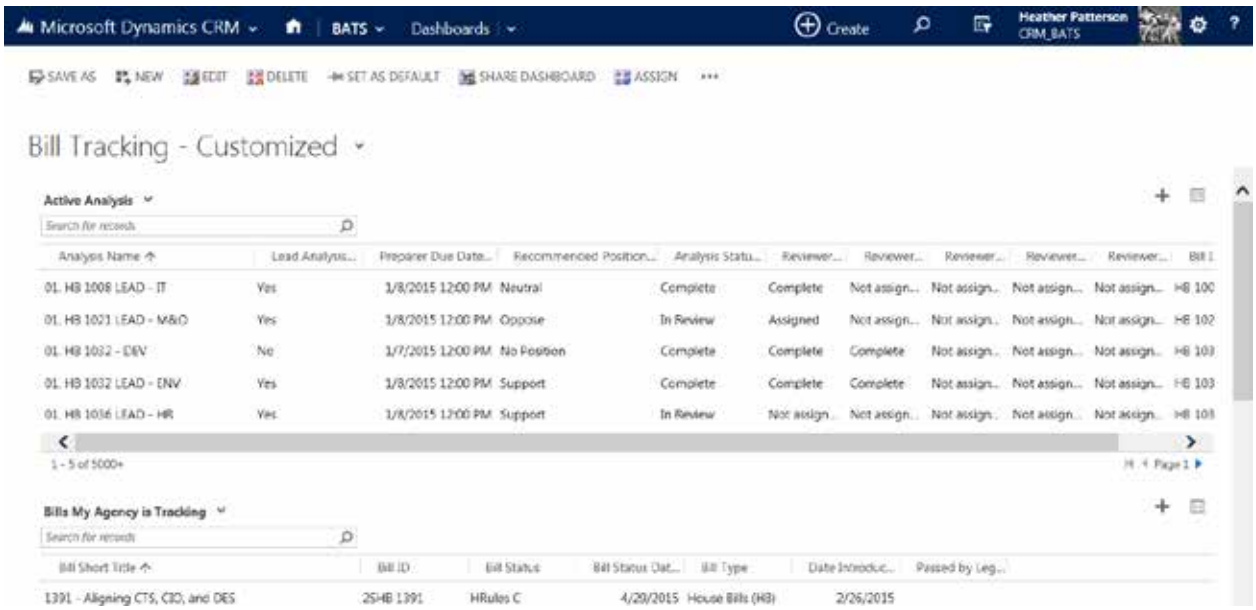
- To display a Chart/Graph select "Show Chart Only"
- To select a Chart/Graph different from the default view, select "Display Chart Selection"



- You can change the size of a component by activating the component and using the buttons by clicking the three dots



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

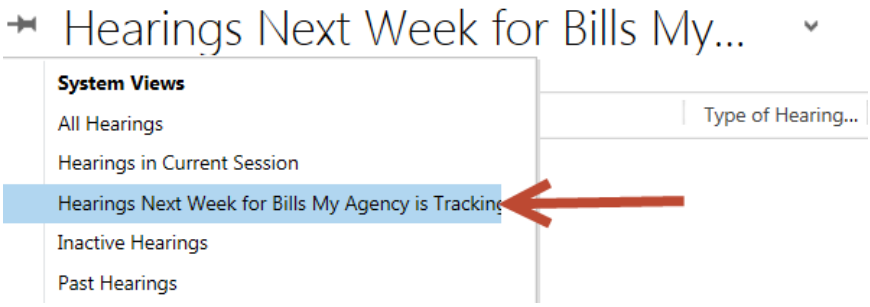


- You can set this custom dashboard as your default view by clicking “Set As Default”

- You can share this custom dashboard to another user by clicking “Share Dashboard”

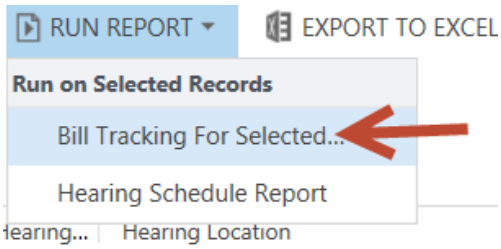
Hearing Report

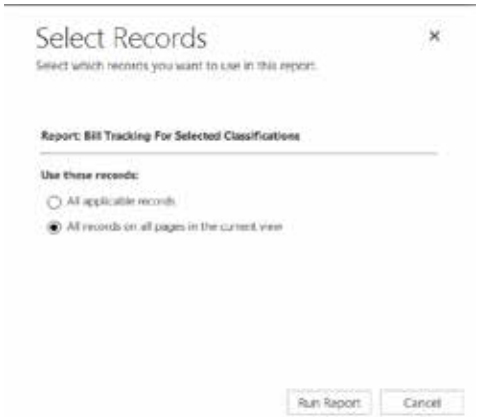
- The Hearing Report is available from either your Bills Page or Hearings Page.
- The Hearing Report is available to be exported.
- The report data relates to the selected view you are using. You will need to create different custom views to display different Hearing Report criteria.
- There is a default view system view available in your views list. This will show all the hearings in the next week that your **Agency** is tracking.
    - Select "Hearings" in the Left Nav
        - Change your view to "Hearings Next Week for Bills My Agency is Tracking"



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"

- 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

The Hearing Report will default to "All applicable records". If you leave this criteria selected it will display all records with a future hearing