

BillTracker

Administrator Guide

State of Oregon

Table of Contents

- Setting up your administrative account..... 3
 - Identifying Agency Administrators..... 3
 - Where do I log in to BillTracker? 3
 - Selecting Agency preferences 4
 - Creating Divisions and Subdivisions..... 4
 - Creating new divisions 5
 - Editing Divisions 5
 - Archiving and Re-activating Divisions..... 6
- Creating Users 6
 - Overview of Privileges and Permissions..... 7
 - Creating User Accounts..... 12
 - Editing User Privileges and Permissions 13
 - Creating General Reviewers 13
 - Editing General Reviewers 14
 - Deactivating Users..... 14
 - Enabling Deactivated Users..... 14
- Adding Review Forms 15
- Providing User Support 15
 - Unlocking User Accounts/Resetting passwords..... 15

Welcome to BillTracker

Setting up your administrative account

Before you get started with BillTracker you will need to create an agency account and identify Agency Administrators for your account. To establish your agency account, contact BillTracker Support at the Department of Administrative Services.

billtracker.support@oregon.gov

Identifying Agency Administrators

Agencies should identify at least two Agency Administrators. As described in more detail later in this manual, agency administrators are authorized to update all aspects of the Agency BillTracker account, including adding and removing users, adding and removing divisions, adding and removing program areas and providing general support for the application.

Where do I log in to BillTracker?

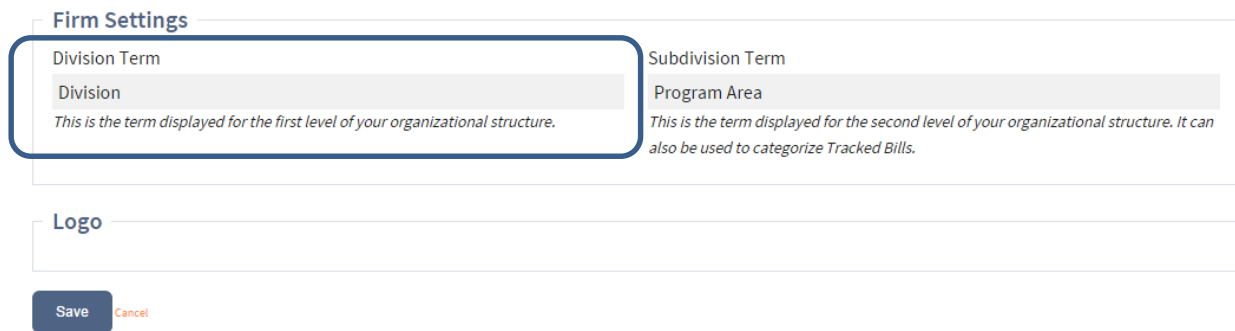
Administrators log into BillTracker at www.billtracker.com. Select Login from the home page. The login page can be accessed directly at www.billtracker.com/login.

Selecting Agency preferences

BillTracker allows agencies to title the tiers of the agency. To set up the Agency preferences select Your Firm from the main navigation menu.



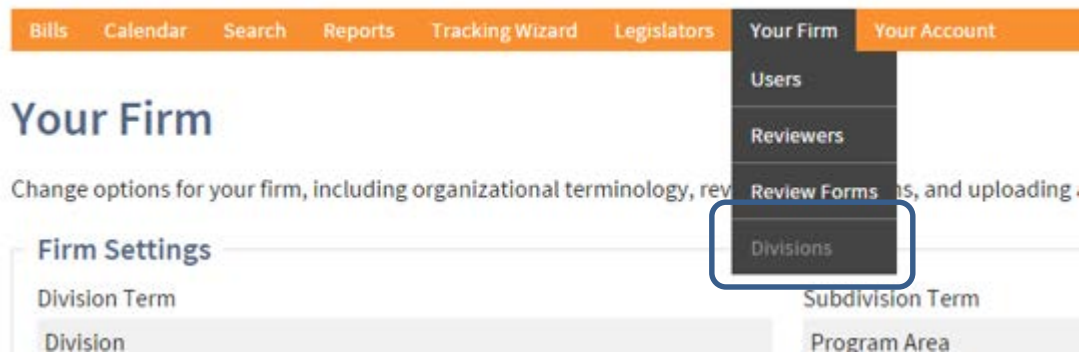
Select titles for your Agencies top tier and second tier of organizational structure. Examples may include Division and Program Area, or Division and Office, or Division and Subject.

A screenshot of the 'Firm Settings' form. The form has a white background and a blue border. It contains two main sections: 'Division Term' and 'Subdivision Term'. The 'Division Term' section has a text input field with 'Division' entered and a description: 'This is the term displayed for the first level of your organizational structure.' The 'Subdivision Term' section has a text input field with 'Program Area' entered and a description: 'This is the term displayed for the second level of your organizational structure. It can also be used to categorize Tracked Bills.' Below these sections is a 'Logo' section with a large empty box. At the bottom left, there are two buttons: 'Save' (dark blue) and 'Cancel' (orange).

You may also upload an agency logo, which will appear on most reports. Select Save to store the organizational structure setting and optional logo.

Creating Divisions and Subdivisions



Selecting the Divisions option under the Your Firm menu will generate a list of the current divisions for the agency.



Creating new divisions

1. Select the Add Division button on the main division screen.

Divisions Add Division

NAME	CONTACT	WORK PHONE	MOBILE PHONE	
Division 1	Jane Doe	555-555-5555	555-555-5555	
Division 2	John Doe	503-234-5678	503-234-5678	
Division 3	Jennifer Doe	503-245-6789	503-245-6789	

2. The menu will guide you through the required information.
 - a. Division name – the division name is required and will show up throughout BillTracker and on all reports.
 - b. Contact – required field
 - c. Address – optional field
 - d. City – optional field
 - e. State – optional field
 - f. Zip – optional field
 - g. Mobile and work phone numbers – optional fields

Creating new subdivisions

Subdivisions are created within the division set up menu.

1. Select Add next to the subdivision name.
2. Enter the name of the subdivision.

To save the changes select the Save button at the bottom of the screen.

Editing Divisions

To edit the division information, select the Edit icon on the far right column adjacent to the division name. This will allow you to change the division name, update any contact information and add or modify subdivisions.

Archiving and Re-activating Divisions

To archive a division select the archive icon on the far right column adjacent to the division name. Archiving a division will remove the division from the Agencies active BillTracker division list on the Tracking Wizard; however all data associated with the division will be preserved.

To re-activate a division select the unarchive icon to the far right column adjacent to the division name. Unarchiving the division will restore the division to the active BillTracker division list.

Creating Users

BillTracker permits administrators to assign a wide range of permissions for application users. There are five primary designations which may be assigned.

1. Agency Administrator
2. Bill Manager
3. User
4. Reviewer
5. Email notification recipient

Individuals may have multiple designations. For example, an Agency Administrator may also be a Bill Manager, or a Reviewer may also be an Email Notification Recipient.

Before adding and editing user permissions, Agency Administrators should familiarize themselves with the range of permissions described below.

Overview of Privileges and Permissions

Agency Administrators

Agency administrators can access all aspects of BillTracker. Administrators can add, edit and remove divisions; add, edit and remove subdivisions; add, edit and remove users; track legislation; assign all levels of review; and read, write and edit all fields associated with a bill. Agency administrators cannot be assigned to manage bills or receive email notifications. To add those permissions administrators must also be designated as Bill Managers or Email Notification Recipients.

Bill Managers

Bill Managers are often the lead legislative contacts for an agency, division or subdivision. Bill Managers can be assigned tracked bills and show up on reports as a manager or lead manager. Bill Managers receive email notifications and/or text notifications for hearings. Bill Managers can read, edit, create and delete any information associated with a bill and have access to all divisions within the Agency account. Bill Managers can view all bill reviews, all materials associated with a bill, votes and vote counts. Additionally, Bill Managers can update all tracking information for all bills for all divisions and subdivisions.

Users

User is the most common permission within Bill Tracker. The permissions granted to Users can be specifically prescribed by division(s) and by specific activities related to legislation. The following table describes each of the available privileges and associated permissions.

Privilege	Permission levels	Description
Bill Tracking	<ul style="list-style-type: none">• None• Edit Tracking	Cannot track bills

		Allows users to add tracked bills and edit existing tracking for bills for authorized divisions.
Materials	<ul style="list-style-type: none"> • None • View • View, edit • View, edit, create • View, edit, create, delete • View, edit, create, delete, send 	<p>Access denied</p> <p>User can view any attached materials</p> <p>User can view and edit any materials</p> <p>User can view, attach, and edit any materials.</p> <p>User can view, attach, edit, and delete any materials.</p> <p>User can view, attach, edit, and delete any materials. Additionally, user can access the Send Materials module which allows users to route documents to internal and external users, including legislators and legislative staff.</p>
Notes (shared)	<ul style="list-style-type: none"> • None • View • View, edit • View, edit, create • View, edit, create, delete 	<p>Access denied</p> <p>Users can view shared notes</p> <p>Users can view and edit shared notes</p> <p>Users can view, edit and create shared notes</p> <p>Users can view, edit, create and delete shared notes.</p>
Notes (unshared)	<ul style="list-style-type: none"> • None • View 	<p>Access denied</p> <p>Users can view all notes</p>

	<ul style="list-style-type: none"> • View, edit • View, edit, create • View, edit, create, delete 	<p>Users can view and edit all notes</p> <p>Users can view, edit and create all notes</p> <p>Users can view, edit, create and delete all notes</p>
EOS Notes	<ul style="list-style-type: none"> • None • View • View, edit 	<p>Access denied</p> <p>Users can view end of session notes</p> <p>Users can view and edit end of session notes</p>
Bill Reviews	<ul style="list-style-type: none"> • None • View • View, edit 	<p>Access denied</p> <p>Users can read reviews for assigned divisions, but cannot assign reviews</p> <p>Users and read and edit reviews for assigned divisions, but cannot assign reviews</p>
Fiscal Impact Reviews	<ul style="list-style-type: none"> • None • View • View, edit 	<p>Access denied</p> <p>Users can read reviews for assigned divisions, but cannot assign reviews</p> <p>Users and read and edit reviews for assigned divisions, but cannot assign reviews</p>
Governor Reviews	<ul style="list-style-type: none"> • None • View • View, edit 	<p>Access denied</p> <p>Users can read reviews for assigned divisions, but cannot assign reviews</p>

		Users can read and edit reviews for assigned divisions, but cannot assign reviews
Search	<ul style="list-style-type: none"> • None • Tracked bills • All bills 	<p>Access denied</p> <p>Users can search and view only tracked bills for authorized divisions.</p> <p>Users can search all bills</p>
Vote Tracking	<ul style="list-style-type: none"> • None • View • View, edit 	<p>Access denied</p> <p>Users can view both internal vote counts and final legislative votes</p> <p>Users can view and update internal vote counts and view final legislative votes.</p>
Divisions	Multi-select	Users can be assigned to a minimum of one division or to multiple divisions.

Reviewers

Reviewers are able to receive and complete reviews. Reviewers do not have access to BillTracker unless they are granted a separate user authority, such as Bill Manager or User. General Reviewers are segmented by division and appear on the Bill Review menu, the Fiscal Impact Statement review menu, and the Governor Review menu.

Email Notification Recipients

Like Reviewers, Email Notification Recipients do not have access to BillTracker. They can, however, be selected to receive email notifications for legislation. Individuals that need access to BillTracker and expect to receive email notifications should be listed as Users and also flagged as Email Notification Recipients.

Creating User Accounts

To create a new user, select Users under the Your Firm heading.



1. From the User screen select New User. This will open a data entry screen permitting the creation of a new user.
2. Enter the User's name and contact information under the User Info section. First name, last name, username and email are all required fields.

User Info

First Name:	Last Name:
<input type="text"/>	<input type="text"/>
Username:	Email:
<input type="text"/>	<input type="text"/>
Mobile Carrier:	Mobile Phone:
<input type="text"/>	<input type="text"/>

3. Enter the User's privileges in the Security Settings window. Consult the previously described privileges and permissions to ensure the correct settings for any new user.
 - a. To create a firm administrator select the Firm Administrator toggle.
 - b. To create a Bill Manager select the Bill Manager toggle.
 - c. To create a User, select the appropriate security settings for Bill Reviewer, Governor Reviewer, Fiscal Impact Reviewer and Notification Recipient then proceed to the next step.

Security Settings

<input type="checkbox"/> Firm Administrator	<input type="checkbox"/> Bill Manager
<input type="checkbox"/> Bill Reviewer	<input type="checkbox"/> Fiscal Impact Reviewer
<input type="checkbox"/> Governor Reviewer	<input type="checkbox"/> Tracked Bill Notification Recipient
<input checked="" type="checkbox"/> Allow Password Change	

4. For Users, complete the Permissions screen to assign individual permissions and divisions to the User.

Permissions

Bill Tracking: None	EOS Notes: None
Materials: None	Notes (<i>not shared</i>): None
Notes (<i>shared</i>): None	Bill Reviews: None
Fiscal Impact Reviews: None	Governor Reviews: None
Search: None	Vote Tracking: None
Divisions: 	

5. Select preferences for the User. This is an optional step. Users can modify settings upon logging in to BillTracker.
6. To save the User settings select the Save button.

Editing User Privileges and Permissions

1. Select the edit icon next to the User's name.
2. The User window will appear and options to modify all the above permissions will be available.
3. To save changes select the Save button.

Creating General Reviewers

1. Select Reviewers from the Your Firm menu.
2. Select New Reviewer.
3. Enter the Reviewer's name, email address and assign the reviewer to the appropriate divisions.
4. Select the Save button to record your changes.

Editing General Reviewers

1. Select the edit icon next to the Reviewers name.
2. Update any information in the Reviewer profile.
3. Select the Save button to store your changes.

Deactivating Users

BillTracker does not permit the deletion of Users; however users can be deactivated if they have left the agency or are no longer involved with the legislative process. All information associated with a deactivated User is maintained.

1. Select Users from the Your Firm menu.
2. Select the edit icon adjacent to the User name and profile.
3. On the User settings screen under User Info de-select the User Enabled toggle.
4. Scroll to the bottom of the User Settings screen and select the Save button to record your changes.

Enabling Deactivated Users

1. Select Users from the Your Firm menu.
2. Select the edit icon adjacent to the User name and profile.
3. On the User settings screen under User Info check the User Enabled toggle.
4. Scroll to the bottom of the User Settings screen and select the Save button to record your changes.

Adding Review Forms

BillTracker allows Administrators to upload documents and forms that will be included as attachments on Bill Review notices, Fiscal Impact Statement notices and Governor's Review notices. Most agency accounts are prepopulated with a Fiscal Impact Statement form, a Fiscal Impact Statement instruction sheet and a Governor's Review form. Additional forms can be added taking the following steps.

1. Select Review Forms from the Your Firm menu.
2. Select Add Form.
3. From the drop down menu select the Form Type.
4. Provide a name for the form. This is the name that will show up on the emailed review form.
5. Attach the form.
 - a. Select the Browse button.
 - b. Use your computer's File Manager to find the document to attach.
 - c. Attach the document.

Select Save to record your changes.

Providing User Support

Unlocking User Accounts/Resetting passwords

If a user becomes locked out of their account, generally because they have entered an incorrect password too many times, the account can be unlocked from the User Settings screen.

1. Select Users on the Your Firm menu.
2. Check to see if the account is locked by looking in the Locked Out column.
3. If the account is locked out, select the Reset Password button to send the User a link to activate a new password.