Legislative Information Notification Update System

LINUS

Administrator's Manual
2009 Session

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1. GETTING STARTED

As an agency LINUS Administrator you will have various responsibilities ranging from setting up and maintaining divisions, offices, and users to answering questions from your LINUS users. Consequently, it recommended that you have some knowledge on how LINUS works and have taken the LINUS user training class.

If you have not been added as an administrator to LINUS, contact the DAS LINUS Help Desk: **Linus.SUPPORT@state.or.us**.

You will also need to request that your e-mail address be added to the LINUS listserv. The LINUS listserv is used to convey important information about the LINUS application such as updates or down time during session. As the LINUS administrator you are responsible for passing this information on to your agency users.

To request that your name be added to the LINUS listserv contact Marjorie Taylor. Her e-mail address is Marjorie.taylor@state.or.us.

NOTE: If you are replacing a previous LINUS administrator, please request that his/her e-mail address be removed from the Listserv when you are added.

To get to LINUS go to **http://linus.state.or.us**.

2. ADMINISTRATION CONSIDERATIONS

Because of agencies being so independent of each other and having their own bill processes established, it has been the approach of LINUS training to say **"how your agency chooses to use LINUS is up to you"**. As a result, LINUS Class Training focuses on the functionality of LINUS.

Through many agency interviews, it has also been determined that agencies want the power to best see fit on how they setup LINUS within their agency. However, they would like some suggested guidelines to consider. This section provides many suggestions that will increase your agency's success in using LINUS.

A. LINUS AGENCY OWNER

It would be a good suggestion that every agency should have someone responsible for how LINUS gets implemented at the agency level. This "owner" should also be responsible for agency LINUS enhancements and features they want implemented in future revisions of LINUS to best accommodate and optimize their agency bill processes. This might be the Agency Administrator or the Agency Legislative Liaison. Without ownership, the success of utilizing LINUS to best serve your agency may have limitations.

- **Who** are the Administrator(s) – agency administrator, agency legislative liaison, super user, custom administrator(s) through developing custom group(s), etc?
- At **What** level are they administering – agency, division, and/or office – information within these levels?
- **When** are they administering – basic, intermediate, and advanced levels – everything?
- **Where** are they Administrating from – forms, email, committee's, planning group, etc?
- **How** is the Agency going to roll out the Administration of LINUS within their Agency?
- **Why** does a certain agency user have a certain level of rights? There should be a reason for there level of rights.
- Decide who has the power to do what and then give that power to them in the form of authorities.

B. LINUS SETUP DECISIONS

Although many of these decisions may have already been made by a prior LINUS Administrator or LINUS owner, it can be helpful to reconsider the original setup. Since Agency structure, processes and policies can change, setting up LINUS differently may be beneficial in addressing those changes.

1. **Agency, Division and Office Setup**
   - Determine what bill tracking process groups align with an agencies organizational chart.
   - Determine what bill tracking process groups don't align with an agencies organizational chart.

- Decide all agency bill tracking groups and then match them up with what LINUS can offer.
- Decide what types of bills can be tracked at the agency level – tier 1 level.
- Decide what types of bills can be tracked at the division level – tier 2 level.
- Decide what types of bills can be tracked at the office level – tier 3 level.
- LINUS limitations – you can make a division under an agency, and you can make an office under a division, but you can’t make a division under a division or an office under an office or an office under an agency.
- By grouping agency bill trackers through the form of divisions, offices, and groups, filtering can be implemented on what a user can see and do within a system. Thus offering security to users by filtering what they can see or what they can do in the system.

2. **Security Considerations**
    - Who is responsible for what in the system (who is responsible for administration, who is responsible for bill analysis, fiscal impact, testimony, who are primary and secondary bill managers for bills, do we even need a secondary bill manager for any bill, for certain bills, etc.),
    - Consider who should use LINUS. Don’t setup workers who don’t need to use LINUS.
    - Consider how you block out agency users from areas they don’t need to be involved with. This is mentioned in the Agency, Division and Office Setup above.
    - Evaluate the current user groups and determine if they meet your Agency’s needs. You may need to set up custom groups with certain authorities. See section on Authorities for more information.

3. **Email Considerations**
    - Evaluate who needs to be aware of all new bills coming in from legislation
    - Evaluate who needs what kind of hearing notifications
    - Evaluate who needs what kind of refresh notifications
    - Evaluate who needs what kind of agency notifications
    - Evaluate who needs to be notified of notes changing
    - Spend sometime evaluating the global Email notification setup and its recourse on the agency.
    - One might even consider just using User Email Notification Override to control agency Email or the possible flood of emails an end user can end up with.

4. **Clean up Agency Entities, Information and Data before Next Session**
    - Delete things that you don’t need that you can delete in the system.
    - Inactivate entities that will no longer be active in the new session.
    - Add new entities that will be used in the new session.
    - Setup new entities that will be used in the new session.
    - Update existing entities that will be used in the new session.

3. ADMINISTRATOR RESPONSIBILITIES

As mentioned above being the Agency LINUS administrator comes with a wide range of responsibilities. Those responsibilities are described in detail in this section.

A. USER HELP

As the Agency LINUS Administrator you will be your LINUS users' contact should they have questions or need assistance in performing their job. Some frequent issues that your LINUS users may experience are as follows:

- **Forgot Password –** As the administrator you can re-set the user's password through the User Information screen.
- **Invalid Login –** If a user can't log on, make sure he/she knows that the logon and password are case sensitive and that the Caps Lock not on. You may also want to re-set the password. If this is the user's first time for logging on, make sure that the user has been assigned to a group and has the Active box checked. Both of these can be found on the User Information screen.
- **Not receiving a Hearing Notice –** If the user is the Bill Manager for the bill or he/she is on the Receive E-mail update list for the bill, make sure the user's e-mail address on the User Information screen is entered correctly. Also check the user's Days Advanced Notice to determine if the user should have received the hearing notice yet.
- **Not receiving Refresh notices –** If a user is not receiving a refresh notice on an event, check the Email Notification User Override screen to see if the event is checked and the notification interval. If the user has never received a refresh notice, make sure the user has the "Get all automated Refresh E-mails checked" and a valid e-mail address.
- **Receiving unwanted Hearing Notices –** If the user is NOT the Bill Manager for the bill or he/she is NOT on the Receive E-mail update list for the bill, make sure the "Get All Automated Hearings" is NOT checked on the User Information screen.
- **Receiving unwanted Refresh notices –** Check the user's Email Notification User Override screen to see if the event is checked.
- **Can't find bills in LINUS –** Make sure the user has selected the correct entry in the drop down fields for Version and Tracked. If no one has tracked the bill, you must select Untracked to find the bill.

If you are unable to help the user, you can contact the DAS LINUS Help Desk: **Linus.SUPPORT@state.or.us**. Be sure to include as much information as possible regarding the problem or issue.

B. ADMINISTRATION Screen

The Administration screen is the focal point for almost all the LINUS administrator's responsibilities. To display the Administration screen click the Administrative link on the Main Menu or at the top of any LINUS screen.

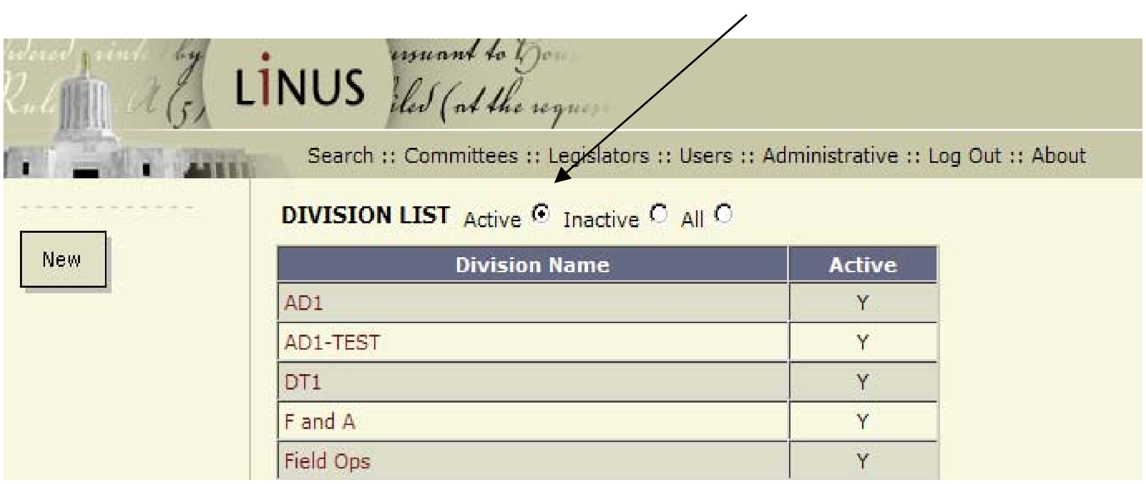
Your agency's name should be displayed. To change your agency name:

1. Type over the existing name and delete any unwanted characters
2. Click Save

C. DIVISIONS

Divisions are considered the second tier and are under the Agency (first tier). To display the list of divisions

1. Click the Divisions link on the Administration screen.
   - Depending upon which radio button is checked the Division List screen will display "Active" divisions only, "Inactive" divisions only, or "All" (active and inactive) divisions.



From the Division List screen, you can create a new division or display an existing division.

To Create a new Division:
1. Click New
   - A blank Division Information screen will display. The Active box will be checked.
2. Enter the Division Name
3. Click Save
   - Once you have saved the division you will be able to add offices and/or users to that division.

To display an existing Division:
1. Click on the division name – the Division Information screen will be displayed.

The Division Information screen has several functions. They are as follows:
- List Offices under the division
- List users assigned to a given division
- Clone division
- Edit division information
- Create a New division

List Offices under the division
1. Click the Office or Office List link
   - The Office List screen will display.

- If you do not have any offices associated to the division, this screen will be empty. To connect an office to a division see instructions below under Office.
- The Office List screen like the Division List screen has the “Active”, “Inactive” and “All” button choices. It also has a New button which will allow you to create a new office or by clicking on the office name display an existing office.

List users assigned to a given division

1. Click the Division User List link
   - The Division User List screen will display.

- All agency LINUS users (Active and Inactive) who have been assigned to this division will be displayed. If you have not assigned users to this division, this screen will be empty. To assign users to the division see Agency Users below for instructions.

- To go to the User Information screen for a specific user, click on the user’s name.

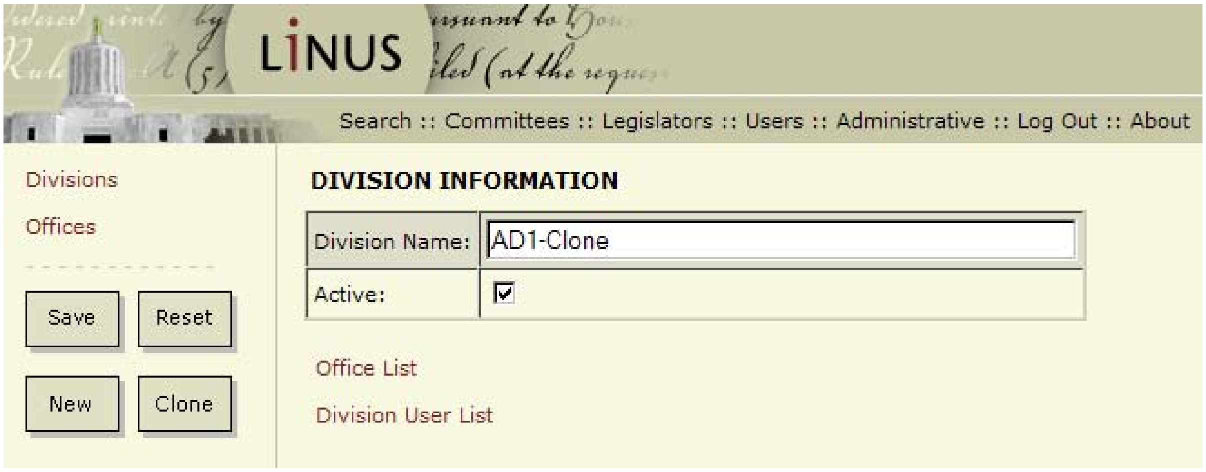
Clone division

On occasion an agency may re-organize causing divisions, offices and people to be moved or re-named. If you want the offices, agency users and your tracked bills to remain connected to the division, you might want to inactivate the old division and create a new “active” one. The Clone button can help you do this.

From the Division List screen:

1. Click on the Division you want to inactivate and clone.
   - The Division Information screen will display
2. Click Clone
   - A duplicate record will be created.
   - The old division record will be changed to inactive. The old division will remain connected to and display with offices, agency users and your bills that were connected to it. But it will no longer be available to select to connect any other users or any other bills.
   - None of the offices, agency users and tracked bills connected to the inactive division will be changed to inactive.
   - The “Inactive” division will still be editable.
   - None of the offices, agency users or tracked bills will be associated to the new “cloned” division record. You must connect the offices, agency users and tracked bills to the new “cloned” division record

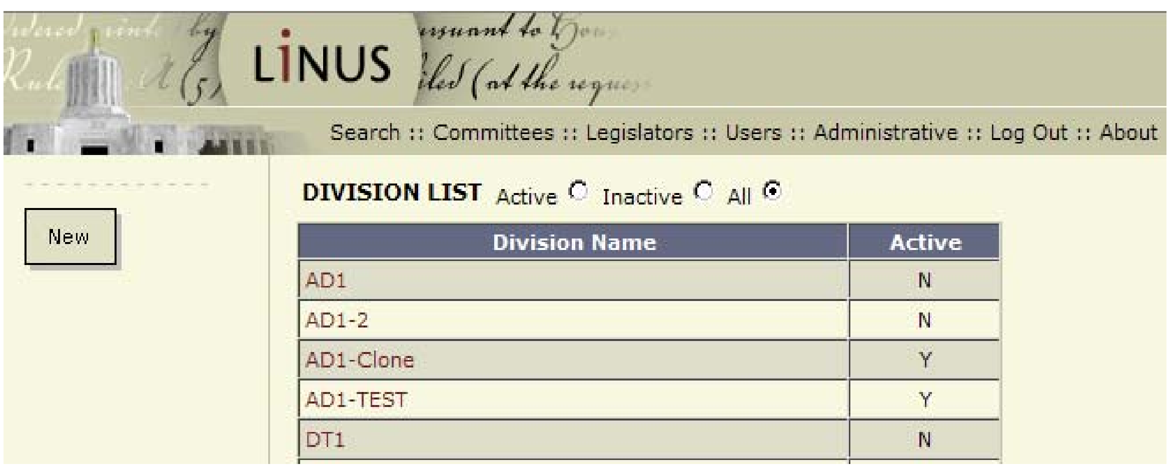
Before leaving the Division Information screen:
3. Type in the new division name
4. Click Save



NOTE:

- If offices were connected to the division, you will need to create new ones under the new division. See Office section below.
- You may also need to clone the agency users who were connected to the now inactive division. You will need to do this if you want to keep all prior connections between the old Division and agency users. See Agency Users section below.
- Should this occur during a session, you may need to connect the new division to bills you are tracking.

If you return to the Division List screen and check the “All” radio button, you will see that AD1 has an “N” in the Active column and AD1-Clone has a “Y”.



Edit Division Information
On occasion a Division name will change or the Division will no longer be needed. When this happens you may need to edit the division information.

From the Division List screen
1. Select the Division name to edit

If you want the division name to change everywhere it is listed including records from previous sessions:
2. Type in the name change
3. Click Save.

NOTE: If you need to keep the old Division name associated to offices, agency users or tracked bills, you will need to use the Clone. See Clone Division above.

OR

If you no longer need to use the Division and do not want to create a division to replace this one:
2. Uncheck the Active box
3. Click Save

NOTE: Setting a Division to “Inactive” is very similar to using the Clone button. The only difference is, when cloning, a duplicate “Active” division is created as well. See Clone Division above.

Create a New Division
See To Create a new Division instructions above.

D. OFFICES

Offices are considered the third tier and are under the division (second tier). In order to view the office list, you must go through the division to which the offices are connected.

1. Click on the Administrative link
    - The Administration screen will display.
2. Click on the Divisions link
    - The Division List screen will display.
3. Click on the Division name (where the offices are connected)
    - The Division Information screen will display
4. Click on the Offices or Office List link
    - The Office List screen will display “Active” offices only, “Inactive” offices only, or “All” (active and inactive) offices depending on which radio button is checked.

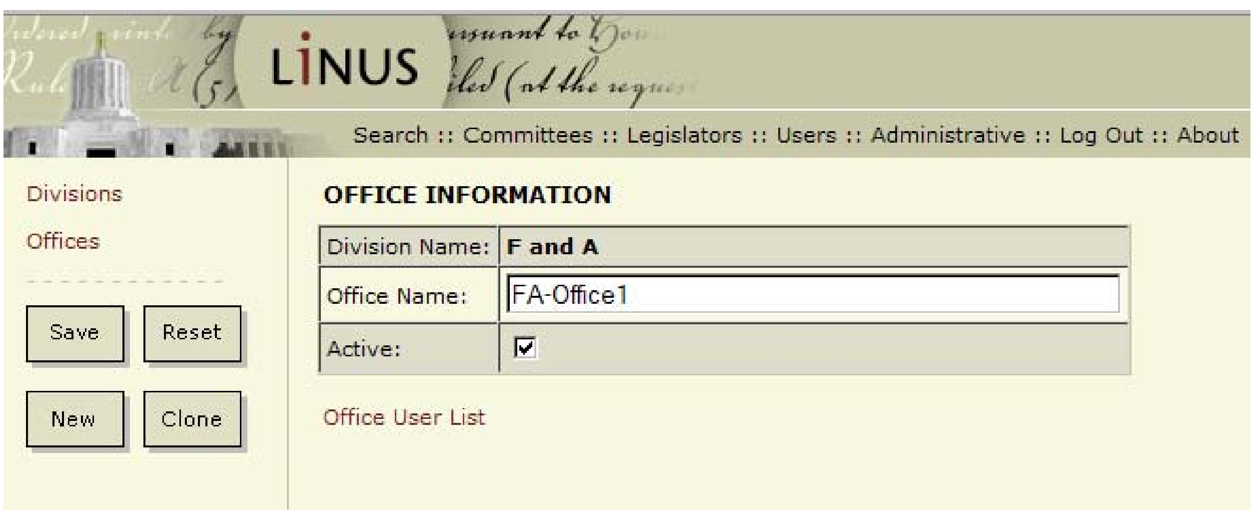
From the Office List screen, you can create a new office that will be connected to the displayed Division Name or display an existing office.

To Create a new Office:

1. Click New
   - A blank Office Information screen will display. The Active box will be checked.
2. Enter the Office Name
3. Click Save
   - Once you have saved the office you will be able to add users to that office. See instructions under Agency Users below.

To display an existing Office:

1. Click on the office name
   - The Office Information screen will be displayed.

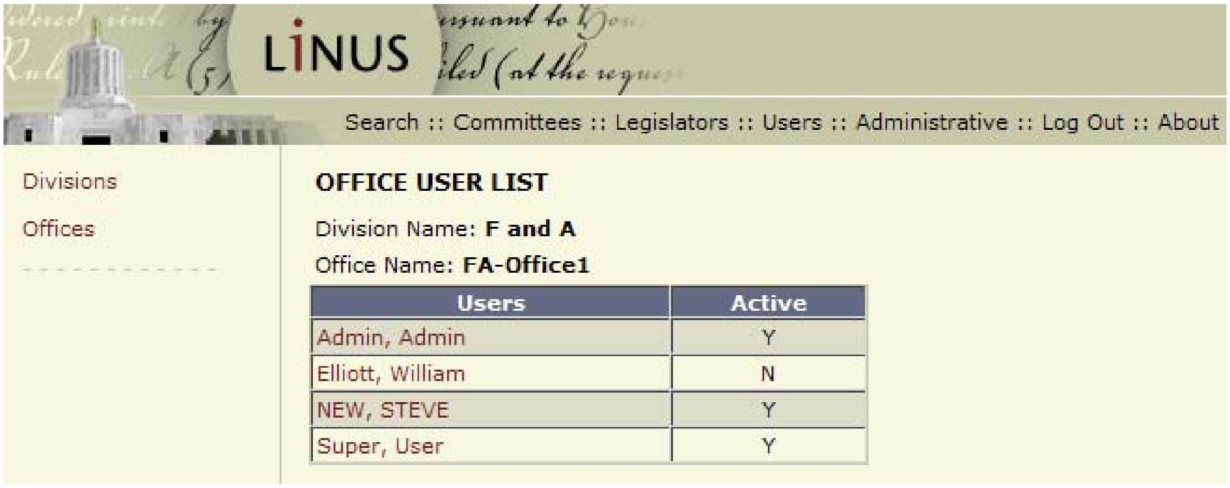


The Office Information screen has several functions. They are as follows:

- List users assigned to a given office
- Clone office
- Edit office information
- Create a New office

List users assigned to a given office

1. Click the Office User List link
   - The Office User List screen will display



- All agency LINUS users (Active and Inactive) who have been assigned to this office will be displayed. If you have not assigned users to this office, this screen will be empty. To assign users to the office see Agency Users below for instructions.

- To go to the User Information screen for a specific user, click on the user's name.

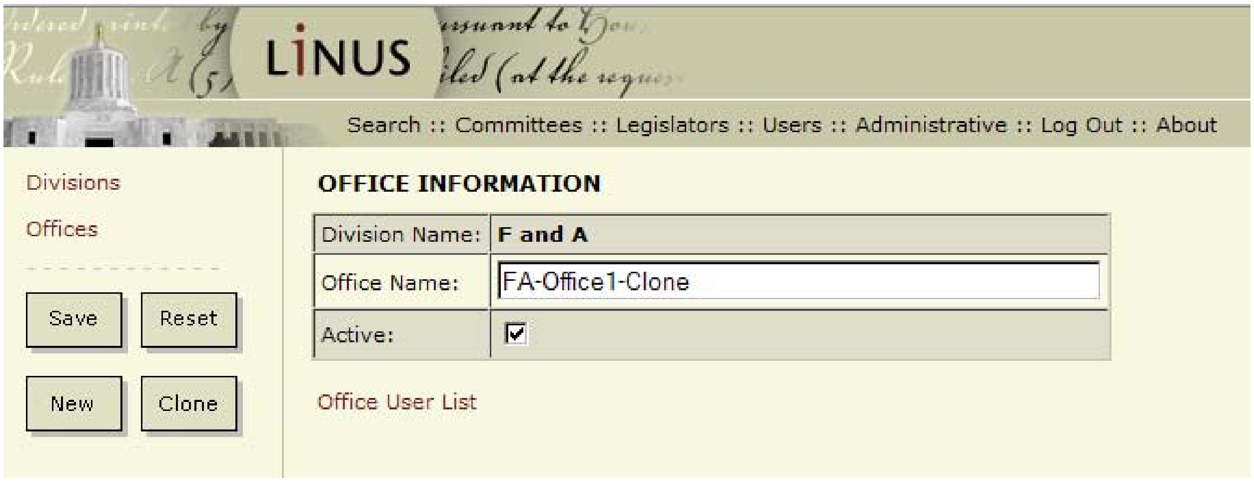
Clone office

On occasion an agency may re-organize causing divisions, offices and people to be moved or re-named. If you want the agency users and your tracked bills to remain connected to the office, you might want to inactivate the old office and create a new "active" one. The Clone button can help you do this.

From the Office List screen:

1. Click on the Office you want to inactivate and clone.
   - The Office Information screen will display
2. Click Clone
   - A duplicate record will be created.
   - The old office record will be changed to inactive. The old office will remain connected to and display with the division, agency users and your bills that were connected to it. But it will no longer be available to select to connect any other users or any other bills.
   - None of the agency users and tracked bills connected to the inactive office will be changed to inactive.
   - The "Inactive" office will still be editable.
   - None of the agency users or tracked bills will be associated to the new "cloned" division record. You must connect the offices, agency users and tracked bills to the new "cloned" division record

Before leaving the Office Information screen:
3. Type in the new Office name
4. Click Save



NOTE: you may also need to clone any associated agency users. You will need to do this if you want to keep all prior associations between the old office and the agency users.

Upon returning to the Office List you will see that the new office record will be "Active" and connected to the division. The "Inactive" office will display when the "Inactive" radio button is clicked.

Edit office information

If you want to shorten or change the office name or the office is no longer needed, you may need to edit the Office information.

From the Office List screen
1. Select the Office name to edit

If you want the office name to change everywhere it is listed including records from previous sessions:
2. Enter the name change
3. Click Save.

NOTE: If you need to keep the old Office name associated to agency users or tracked bills, you will need to use the Clone. See Clone Office above.

OR

If you no longer need to use the Office and do not want to create an office to replace this one:
2. Uncheck the Active box
3. Click Save

NOTE: Setting an Office to "Inactive" is very similar to using the Clone button. The only difference is, when cloning, a duplicate "Active" office is created as well. See Clone Office above.

Create a New office
See To Create a new Office instructions above.

E. AGENCY USERS

As the LINUS administrator you will be responsible for adding new users, assigning users to a division/office, assigning authorities, re-setting agency user's passwords (when user forgets) and inactivating users for your agency.

To view the Agency User List

1. Click the Users link on the Main Menu or located at the top of any LINUS screen
   - Depending upon which radio button is checked the Agency User List screen will display "Active" users only, "Inactive" users only, or "All" (active and inactive) users.

From the Agency User List screen, you can create a new user or display an existing user.

To Create a new User:

1. Click New
   - An empty User Information screen will be displayed.
2. Enter the Last Name and First Name

- For consistency on the User Names list screen choose one method for entering names (For example, use all caps or use first letter cap and remainder lower case)

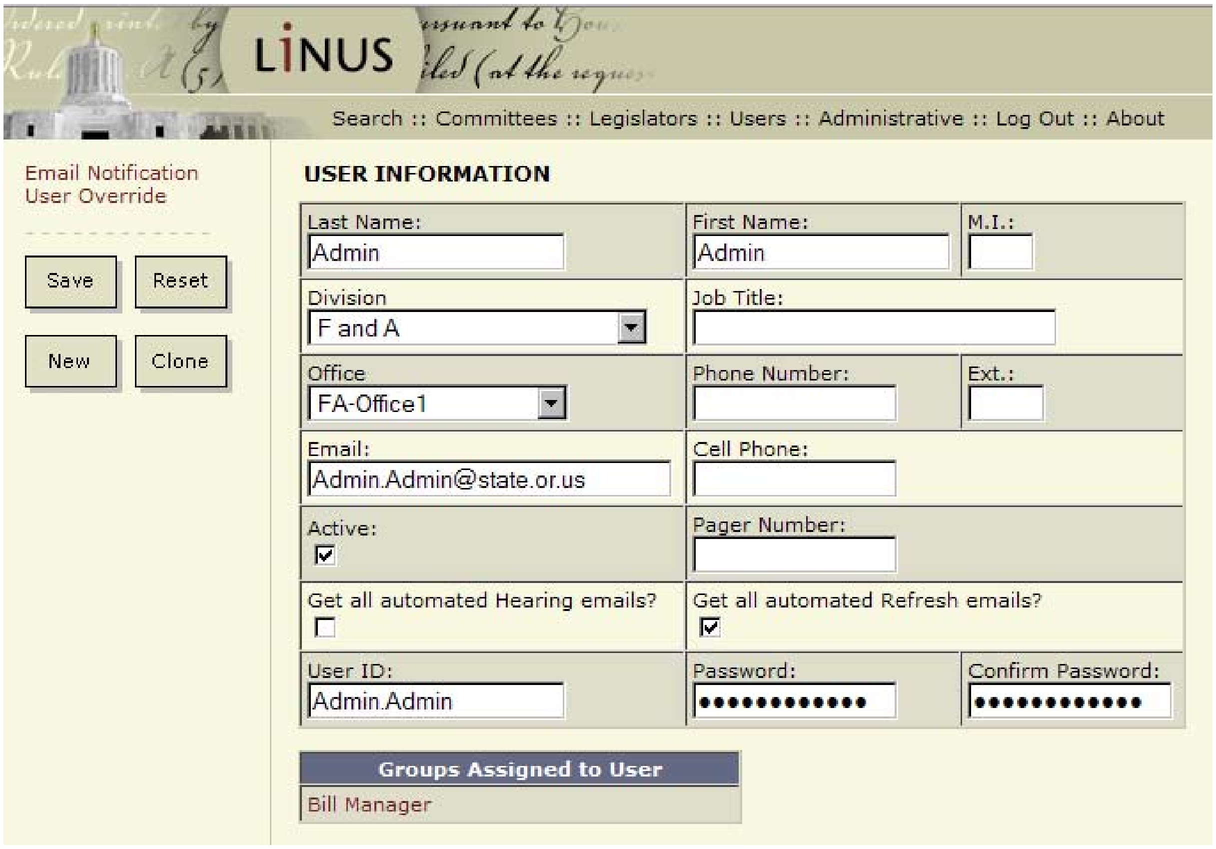
3. Select a Division from the drop down
   - If you have organized your agency into divisions, this is where you assign the user to a division
4. Select an Office from the drop down
   - If you have organized your agency into offices, this is where you assign the user to an office.
5. Enter the user's E-mail address
   - If the user needs to receive e-mails generated by LINUS you must enter an e-mail address for the user.
6. Check the box "Active." (This should be defaulted to Active on New)
7. "Get all automated Hearings?" box
   - This should only be checked if the user is to receive hearing notices for all your agency's tracked bills.
8. "Get all automated Refresh emails?" box
   - The should be checked if the user is to receive one or more of the Refresh Notification emails
9. Enter a user ID.
   - The user ID must be unique. The recommended user ID is the first half of the person's state e-mail address (the portion before the @ sign). However, if the person has used their e-mail address at another agency/division/office, something different will need to be used.
   - Since the user ID is case sensitive, it is recommended that all user IDs be entered in lower case letters.
10. Enter a password and confirm password
    - Once again this is case sensitive. It is recommended that the password be all lower case letters.
    - Inform the user of the user ID and "temporary" password and instruct them to log in and change the password to one of their own selection.
11. Click Save

All other fields on the User Information screen are optional.

NOTE: Before a user can logon the user must be assigned to a Group. (See instructions below in Groups)

To display an existing User:

1. Click on the user's name
   - The User Information screen will be displayed.



The User Information screen has several functions. They are as follows:

- Clone a User
- Edit User information
- Create a New User

This screen also has links to:

- Email Notification User Override screen
- Group Information screen for groups assigned to user

Clone a user

On occasion a user may change his/her name or an agency may re-organize causing divisions, offices and people to be moved. If you want the user's name to remain unchanged in previous sessions or you want the user's record to remain connected to a previous session division and office, you might want to inactivate the old user record and create a new "active" one. The Clone button can help you do this.

From the Agency User List screen:

1. Click on the user name you want to inactivate and clone.
   - The User Information screen will display
2. Click Clone
   - A duplicate record will be created
   - The old user record will be inactivated. But it will no longer be available to select to connect any other bills.
   - The old user record will remain attached to any division/office and bills he/she was assigned to track.
   - The "inactive" user record will still be modifiable.

- The new “active” user will be assigned to the same group(s) as the old “inactive” user record
- The new “active” user will be able to keep the User ID as it is changed on the inactive record
- The new “active” user will not be assigned to any bills (if the old user was assigned to any)

Before leaving the User Information screen:
3. Type in the changes (i.e. select new division/office, change last name, etc.)
4. Click Save

Edit User Information
Although the user can change his/her information, you may still need or want to make the modifications.

1. Select the user’s name from the Agency User List screen
2. Enter your changes
3. Click Save

NOTE: Changing the user’s name will change it everywhere it is displayed including previous sessions. If this is not what you want to do, you may want to use the Clone button (see instructions above).

Changing the user’s division and/or office will not effect current session information or previous session information. However, if history is needed to show that the user was connected to a different division and/or office, you may want to use the Clone button.

If the user leaves your agency or is no longer working in the legislative position and you do not need to create a user record to replace this one, you may need to inactivate the user. Keeping your user list current is not only a security measure (inactive users can not logon) but it is also helpful when assigning bill managers or those who are responsible for one or more of the bill documents as only active users will display in drop down fields.

To do this:
1. Select the user’s name from the Agency User List screen
2. Uncheck the Active box
3. Click Save

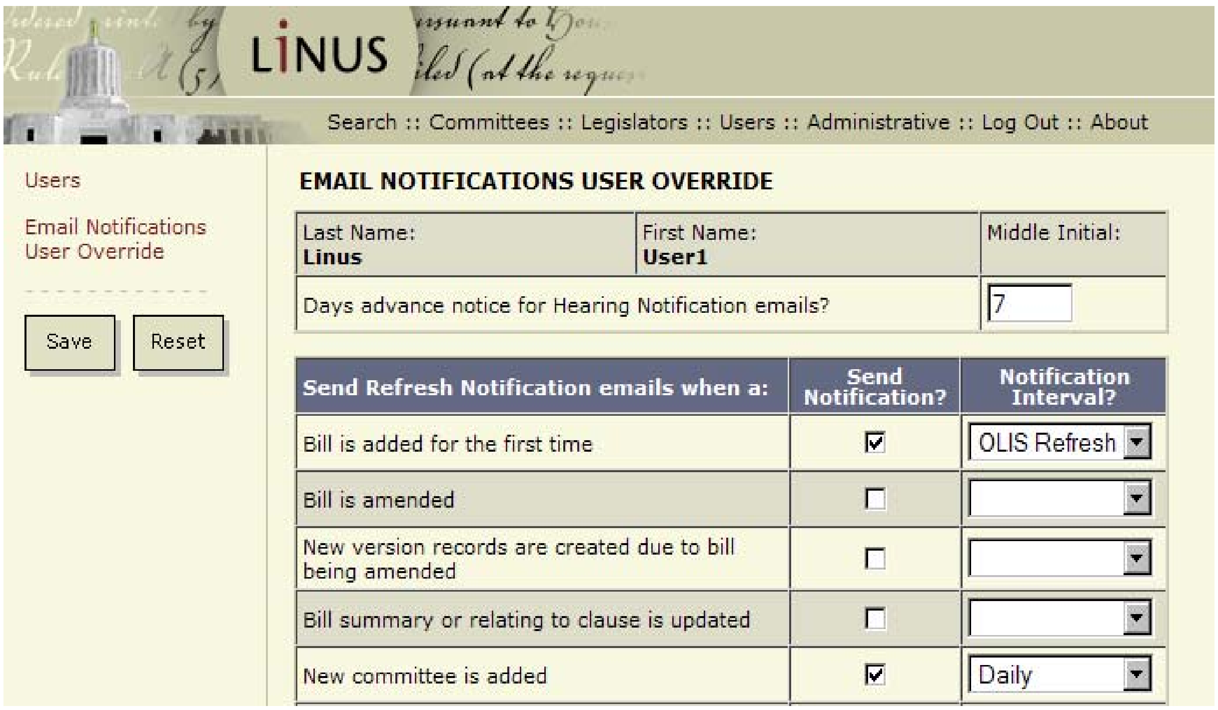
NOTE: Setting a user to “Inactive” is very similar to using the Clone button. The only difference is, when cloning, a duplicate “Active” user record is created and the user can still log on to LINUS. See Clone a User above.

Create New User
See To Create a new User instructions above.

Set E-mail Notification User Override
On occasion you may have certain users who need to receive different e-mail notifications than the rest of the agency. For those users an e-mail notification override can be set up. Although the user can make changes to his/her E-Mail Notification User Override screen, you may want or need to set up the overrides for the user.

From the User Information screen for the user who needs the override

1. Click the Email Notifications User Override link
   - You will notice that the user's name is displayed and if changes have not yet been made to this user's override screen, the information will be the same as for the agency.



2. Change the information that should be different for this user
3. Click Save
   - For more information on the "Days advanced notice" and the "Refresh Notification emails" see Setting Notification E-mail defaults below.

F. GROUPS

When each agency was initially given access to LINUS three groups were automatically created: Administrator, Bill manager and Super User. The Administrator group was given all LINUS authorities. The Administrator group should always have all authorities and its name should never be changed.

The authorities for the Bill manager and Super User groups were left up to each agency to determine their responsibilities. As with the Administrator group the names for Bill manager and Super user should not be changed.

To view the existing groups for your agency:
1. Click the Groups link on the Administration screen
   - Both the "Active" and "Inactive" groups will be displayed.

From the Group List screen you can Create a New Group or Display an existing Group.

Create a New Group
1. Click New
   - A blank Group Information screen will be displayed.
2. Enter in the Group Name
3. Click Save

Display an existing Group
1. Click on the Group Name you want to display
   - The Group Information screen will be displayed.

The Group Information screen has several functions. They are as follows:
- Create a New Group
- Edit Group Information
- List the Authorities assigned to the Group

- List the Users assigned to the Group

Create a New Group
See the Create a New Group instructions above.

Edit Group Information
Occasionally a Group may no longer be needed or you may need to change the name. You can do this on the Group Information Screen.

NOTE: Do not change the group name or inactivate Administrator, Bill Manager or Super User.

1. Select Group Name from Group List screen
   - The Group Information screen will be displayed.
2. Enter changes
3. Click Save

If a Group is set to "Inactive", the users assigned to the group will not be able to perform the tasks that were allowed by the authorities. The user must be assigned to another group with the authorities if he/she is to continue to perform them.

List the Authorities assigned to the Group
To view the specific authorities assigned to a group:
1. Click on the Group Authority List link on Group Information
   - The Group Authority List screen will display.

The Group Authorities List screen allows you to add and delete authorities to the selected Group.

To Add Authorities to groups
1. Select authority from the drop down list
2. Click "Add"
   - The authority will be displayed in the Authorities Assigned to Group list
   - Add additional authorities as needed for the user group you have created.

To Delete Authorities to groups

1. Click on the Delete next to the authority to remove
   - That authority will no longer be assigned to the group

List the Users assigned to the Group

1. Select Group User List link from the Group Information screen
   - The Group User List screen will display. This screen allows you to add and delete users to the selected Group.

To Add users to the group

1. Select a user name from the User Name drop down field
   - Only “Active” users will be available in the drop down list although all users whether “Active” or “Inactive” will display under the Assigned to Group list.
2. Click Add
   - The user’s name will be displayed under Users assigned to group. You will also see the group assignment on their User Information screen.
   - A user will appear on the list until it is deleted through this screen.

To Delete users from the group

1. Click Delete next to user to remove
   - The user’s name will no longer be displayed in the group

G. LINUS AUTHORITIES

This section goes into more detail on the authorities. Because many of the authorities are at screen level, each authority was put under the screen to which it allows access. In those instances where multiple authorities are needed to access a screen all the authorities were identified.

Bill Summary Screen

To access the Bill Summary screen, the Group must have either the View Bill Data or the Edit Bill Data authority. Either of these authorities also allows the Group to view the **Hearing Schedule** and **Action History Screens**.

- **View Bill Data –** The Group assigned this authority cannot edit the bill data or the notes data and will not see ***Save*** and ***Reset*** buttons.
- **Edit Bill Data –** The Group with this authority can edit certain data on the Bill Summary screen but not the notes data. These users will see ***Save*** and ***Reset*** buttons.

Bill Text

Besides needing the View Bill Text authority the Group will also need either the View Bill Data or Edit Bill Data authority.

- **View Bill Text –** The Group with this authority will be able to view the actual text of a bill. A ***View PDF*** link will be displayed on the **Bill Summary Screen**.

Bill Notes

To access the Notes screen where notes are added or edited, the Group need either the View Bill Data or Edit Bill Data authority and must also be assigned one or both of the following authorities:

- **Edit Bill Notes –** This authority allows for both editing and deleting of the bill notes on the Bill Summary Screen. An ***Edit*** and ***Delete*** will be displayed.
- **Add Bill Notes –** The Group with this authority can add the Bill notes. These users will have a ***New Note*** button displayed.

Bill Summary Report

Besides needing the View Bill Summary Report authority the Group will also need either the View Bill Data or Edit Bill Data authority.

- **View Bill Summary Report –** The Group with this authority can view and print the **Bill Summary Report**.

Fiscal Impact Screen

To access the Fiscal Impact screen, the Group must have either the View Fiscal Data or the Edit Fiscal Data authority. The Group will also need either the View Bill Data or Edit Bill Data authority.

- **Edit Fiscal Data –** The Group with this authority can edit certain data on the Fiscal Impact Screen. They will have a ***Save*** and ***Reset*** button displayed.
- **View Fiscal Data –** The Group with this authority can view the Fiscal Impact Screen data. They will not be allowed to edit and ***will not have a Save and Reset button*** displayed.

Fiscal External Documents
To access the Fiscal External documents the Group will need access to the Fiscal Impact Screen (See Fiscal Impact Screen above) as well as one or more of the following authorities:

- **Attach Fiscal External Documents –** The Group with this authority can attach a fiscal impact document to a bill. They will have an ***Attach*** button displayed.
- **Detach Fiscal External Documents –**The Group with this authority can remove a fiscal impact document from a bill. They will have a ***Detach*** button displayed.
- **View Fiscal External Documents –** Users with this authority can view the fiscal external document that is attached to the bill. The ***View*** link will be displayed on the Fiscal Impact Screen for these users only.

Fiscal Notes

- **Edit Fiscal Notes –** Groups with this authority can edit and delete the notes on the Fiscal Screen. They will have an ***Edit*** and ***Delete*** button displayed.
- **Add Fiscal Notes –** Groups with this authority can add the notes on the Fiscal Impact Screen. They will have a ***New Note*** button displayed.

Testimony, Blue Sheet, and Bill Analysis Screens
To access the Testimony, Blue Sheet and Bill Analysis screens, the Group must have either the View External Data or the Edit Edit Data authority. The Group will also need either the View Bill Data or Edit Bill Data authority.

- **View External Data –** Allows users to view the external document data on the Users assigned this authority will not be allowed to edit and will ***not have a Save and Reset button*** displayed.
- **Edit External Data –** This authority allows Groups to edit certain data on each of the external document screens on the **Testimony, Blue Sheet, and Bill Analysis Screens**. They will see a Save and Reset button on each of these screens. The Testimony screen displays a ***New*** button.

Other External Documents
To access the External Documents on the Testimony, Blue Sheet and Bill Analysis screens the Group will need access to those screens (See Testimony, Blue Sheet, and Bill Analysis above) as well as one or more of the following authorities:

- **Attach Other External Documents –** Allows the Group to attach other external documents to a bill on the **Testimony, Blue Sheet, and Bill Analysis Screens.** Users assigned this authority will see an ***Attach*** button on these screens.
- **Detach Other External Documents –** Allows the Group to attach other external documents to a bill on the **Testimony, Blue Sheet, and Bill Analysis Screens**. The user assigned this authority will see a ***Detach*** button on these screens.
- **View Other External Documents –** Allows the Group to view the other external documents that are attached to the bill on the **Testimony, Bill Analysis, and Blue Sheet Screens**. Users with this authority will see a ***View*** button on these screens.

Administration Screen
To access the Administration screen and all the links on that screen, the Group must have either the View Administrative Screen Data or the Edit Administrative Screen Data.

- **View Administrative Data** – The Group assigned this authority cannot edit any information on the administrative screens or User Information (except their own) and ***will not see Save, Reset or New buttons***.
- **Edit Administrative Screen Data –** The Group assigned this authority is allowed to edit the data on all the administrative screens including the data on the User Information screen (except User ID and Password).

User Id and Password
To have access to another user's User ID and password, the Group must have the Edit Administrative Screen Data authority and the Edit Password authority.

- **Edit Password –** The Group with this authority can change the User Id and password for another user on the User Information screen.

Legislator Information Screen
There is no authority needed to view the Legislator List and Legislator Information screens.

Legislator Notes

- **Edit Notes –** Groups with this authority can edit and delete the notes on the Legislator Information Screen. They will have an ***Edit*** and ***Delete*** button displayed.
- **Add Notes –** Groups with this authority can add notes on the Legislator Information Screen. They will have a ***New Note*** button displayed.

LINUS Reports

- **View Reports –** Groups with this authority can view and print all reports (except Bill Summary Report) that are defined within the application. They will a link to each report displayed on the Search Results screen. This Group will be able to create, view, print and save Customized Reports.

Search and Search Results
There is no authority needed to be able to access the Search and Search Results screens

Agency User List and User Information
There is no authority needed to be able to view the Agency User List and User Information screens.
Each user is able to edit his/her information on the User Information screen.

Committee List and Committee Information
There is no authority needed to be able to view the Committee List and Committee Information screens

H. BILL SUBJECTS

In order to select a Subject on the Bill Summary screen, it must be "Active" and on the Subject List.

To view the Subject List

1. Click the Bill Subjects link on the Administration screen
   - Depending upon which radio button is checked the screen will display "Active" subjects only, "Inactive" subjects only, or "All" (active and inactive) subjects.

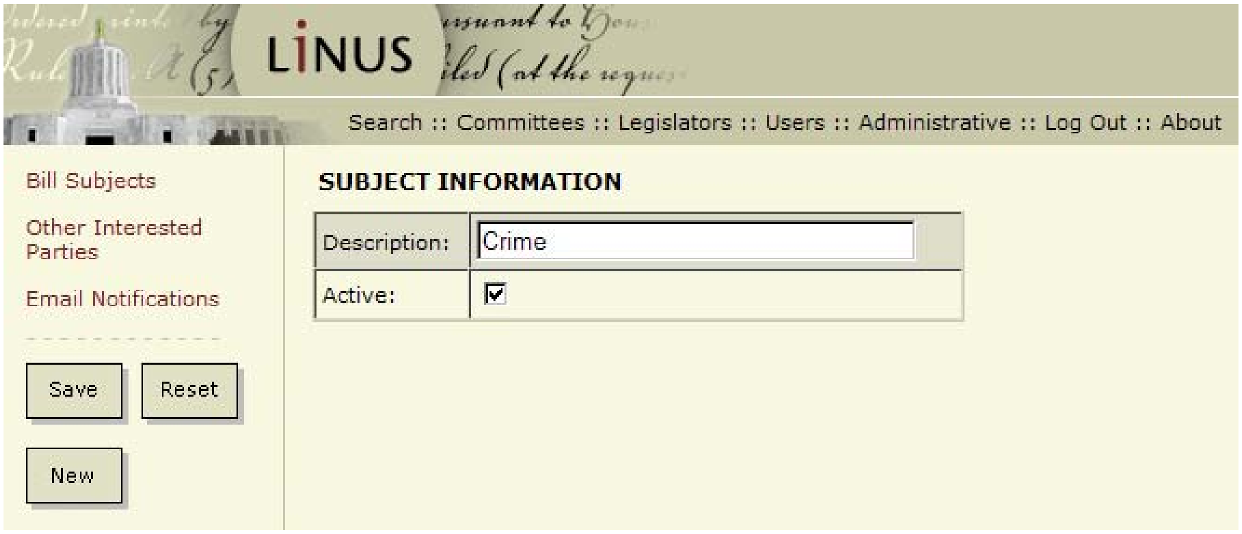
From the Subject List screen, you can Create a new Subject or Display an existing one.

Create a New Subject

1. Click the New button.
   - A blank Subject Information screen will be displayed.
2. Enter the name of the new subject.
   - The Active box will be checked
3. Click Save

Display an existing Subject

1. Click on the Subject Name
   - The Subject Information screen will be displayed



The Subject Information screen has several functions. They are as follows:

- Create a New Subject
- Edit Subject Information

Create a New Subject
See Create a New Subject above

Edit Subject Information
Occasionally you may need to modify the subject name or you may no longer want the subject to be available on the Bill Summary screen. You can do these through the Subject Information Screen.

Modify Subject Name

1. Select the Subject to be edited from the Subject List screen
2. Enter change in Description field
3. Click Save

Make Subject unavailable on Bill Summary

2. Click the Active check box to remove the check
3. Click Save

I. OTHER INTERESTED PARTY LIST

In order to select an Other Interested Party on the Bill Summary screen, that person or organization must be “Active” and on the Other Interested Party List.
To view the Other Interested Party List

1. Click the Other Interested Parties link on the Administration screen
    - Depending upon which radio button is checked the screen will display “Active” interested parties only, “Inactive” interested parties only, or “All” (active and inactive) interested parties.

From the Other Interested Party List screen, you can Create a New Interested Party or Display an Existing one.

Create a New Interested Party

1. Click the New button.
    - A blank Other Interested Party Information screen will be displayed.
2. Enter the name of the new interested party.
    - The Active box will be checked
    - Contact name, Contact phone and extension are optional fields
3. Click Save

Display an existing Interested Party

1. Click on the interested party name
    - The Other Interested Party Information screen will be displayed

The Other Interested Party Information screen has several functions. They are as follows:

- Create a New Other Interested Party

- Edit Other Interested Party Information

Create a New Other Interested Party
See Create a New Other Interested Party above

Edit Other Interested Party Information
Occasionally you may need to modify the Other Interested Party information or you may no longer want the Interested Party to be available on the Bill Summary screen. You can do these through the Other Interested Party Information Screen.

Modify Other Interested Party
1. Select the Interested Party to be edited from the Other Interested Party List screen
2. Enter changes
3. Click Save

Make Other Interested Party unavailable on Bill Summary
2. Click the Active check box to remove the check
3. Click Save

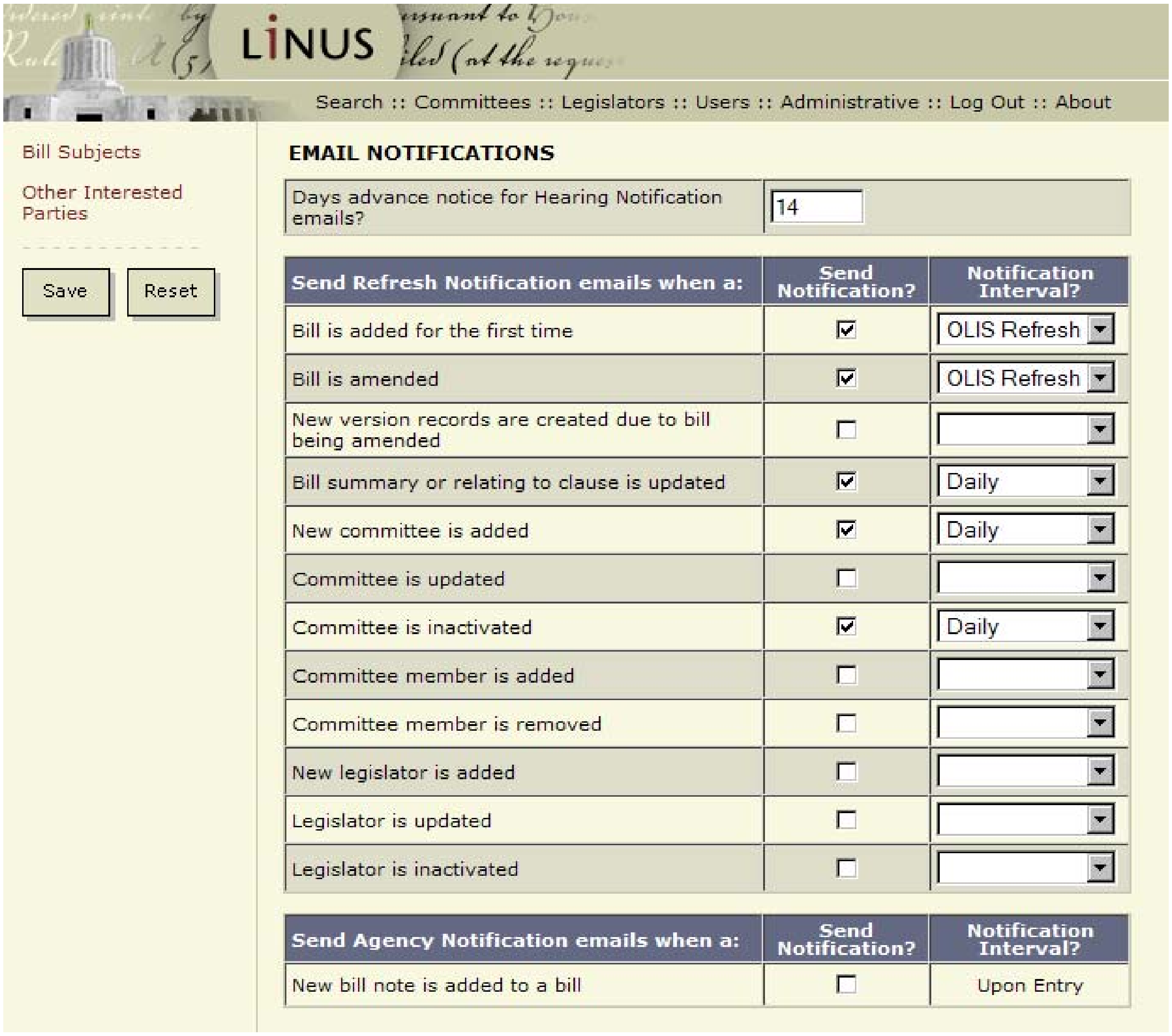
J. SETTING E-MAIL NOTIFICATION DEFAULTS (Agency)

The Agency LINUS Administrator sets the agency's e-mail notification defaults for the "Days Advance Notice" and for the Refresh events. The Third Reading Notice does not require the administrator to set defaults. Bill managers and persons on the Receive Email Update list for the bill will automatically receive the Third reading notification. Those persons in the Super User Group will get the Third Reading notice for all bills the agency is tracking.

How you set up the defaults will determine how many and how often agency users (those who are set up to receive notifications) receive e-mails from LINUS. Therefore, it is recommended that you select on this screen only the "common information" all agency users must receive. Then use the E-mail Notification User Override for those individuals who must receive additional information. See LINUS Setup Decisions in the Administration Consideration section above.

The following information provides an explanation on the E-mail Notifications screen.

1. Click Email Notifications from the Administration screen
   - The E-mail Notifications screen will be displayed



The Email Notifications screen has several functions. They are as follows:

- Set Days Advance notice for hearings
- Select Refresh events and notification interval
- Select Agency event

Set Days Advance Notice for Hearing Notification
The Days Advance Notice field pertains to the hearing notifications only. This field indicates how far in advance the agency users will begin receiving email notifications on a bill your agency is tracking.

1. Enter a number in Days Advanced Notice for hearing notification field
   To determine Days Advanced Notice number:
   - When the difference between the current date and the scheduled date of the meeting is less than or equal to the "Days Advance Notice" field, the agency users will begin receiving the notification. They will continue to receive a notification on the "Daily run" (6:30 a.m.) until the meeting is held or cancelled or the bill is removed from the agenda.

- Depending on how far in advance a committee schedules a meeting and how far out you want to be notified, will determine whether users receive a notification at OLIS refresh (this happens every 15 minutes).
- It is recommended you set the Days Advance Notice to nothing lower than 4. Otherwise you will be notified on the Saturday "Daily Run" of the meeting scheduled for Monday. If you do not set the agency default, LINUS will automatically use 2 days.

2. Click Save
   - The Bill Manager of the bill will receive all hearing notices as will any persons listed under Receive E-mail updates.
   - Do NOT check the Receive all Hearing notifications on the User Information screen unless the user needs to receive hearing notices for all bills the agency is tracking.

Select Refresh events and notification interval

There are actually three groups of Refresh events: Actions on Bills, Actions on Committees, and Actions on Legislators. As the LINUS administrator, you will need to identify the events for your agency and the interval (Refresh or Daily) in which these events will be received.

1. Check the Send Notification box for Refresh event
2. Select Notification Interval
   - If OLIS Refresh is selected the users will receive notice of the event at the next "OLIS" refresh. If Daily is selected the users will receive notice of the event at the next "Daily Run".
   - Select all Refresh events that you want your agency users to receive
3. Click Save
   - Remember in order for the user to receive any of the Refresh events he/she must have the "Get all automated refresh e-mails' checked on the User Information screen.
   - The only exception is for the "Bill is amended" notification event. The Bill manager assigned to the bill and the persons on the Receive email update list will receive this notification at OLIS refresh. They will receive this notification even if the "Get all automated refresh e-mail is not checked on their User Information screen or if the Bill is amended event is not checked.

Select Agency event

The Agency event is different from the Refresh notification in that an e-mail notice is sent upon entry of the new bill note or editing of bill note. All users listed under the Receive E-mail Update field for the bill will receive the notice.

If all users do not need this information, use the E-mail Notification User Override for those individuals who need to receive it.

K. SAVED SEARCHES

As the Agency LINUS administrator, you will want to maintain the Saved Search List keeping only those searches that are useful. Since the Search Name field displays all Saved Searches even those from previous sessions, you will need to delete the ones you do not want. NOTE: A Saved Search can not be edited.

1. Click Saved Searches on the Administrative screen

- The Save Search List will display

LINUS

Search :: Committees :: Legislators :: Users :: Administrative :: Log Out :: About

SAVE SEARCH LIST

Search Name	Search Description	Search Fields	
DA tracked active		**Bill Version** = Current **Primary Bill Managers** = Allen, Dorothy; **Session Type** = Session **Session Year** = 2005 **Tracked** = Tracked Active	Delete
INSmichael.m.morterPriority documents due	Michael Morter as primary bill manager, sorted by priority	**Sort By** = Priority **Bill Version** = Current **Primary Bill Managers** = Morter, Michael M; **Session Type** = Special **Session Year** = 2008 **Tracked** = Tracked Active	Delete
law enforcement		**Bill Version** = Current **Session Type** = Special **Session Year** = 2008 **Summary** = law enforcement	Delete

2. Click Delete next to the Search Name to be removed
3. Click The Administrative link or use your browser's back arrow to return to the Administration screen

L. SAVED REPORTS

Saved Reports like the Saved Searches are not editable. However, the Agency LINUS administrator can delete any unwanted Saved Reports.

1. Click Saved Reports on the Administration screen
   The Save Report List screen will display.

LINUS

Search :: Committees :: Legislators :: Users :: Administrative :: Log Out :: About

SAVE REPORT LIST

Report Name	Description	Report Columns	
Last Action Report	This is my report.	Relating To Clause Bill Summary Division Bill Manager Last Action only	Delete

2. Click Delete next to the Saved Report to be removed
3. Click the Administrative link or use your browser's back arrow to return to the Administration screen

M. END OF SESSION

Agencies have 90 days after the end of session to make changes to the records for that session, add notes, etc. At that time the agency information will be locked and no more changes can be made.

To have the 90 days extended, you need to contact Marjorie Taylor. Her e-mail address is Marjorie.taylor@state.or.us