

LobbyGov

LobbyGov Legacy

User Guide

portal.lobbygov.com

November 2026

About this guide

This guide covers LobbyGov Legacy, the LobbyGov site at portal.lobbygov.com. It is organized by topic area. The Contents pages list every article under its topic, and the Index at the back lists articles and their main headings alphabetically.

Articles marked "Enterprise accounts" apply to accounts that use Bill Analysis and the other Enterprise features.

Effective December 1, 2026, LobbyGov Legacy is in maintenance mode: it continues to receive security patches, operational updates and bug fixes, but not new features except in extraordinary circumstances. It is expected to reach end of life on November 30, 2029. LobbyGov with AI (app.lobbygov.com) is the primary LobbyGov platform and has its own User Guide.

For help, visit support.lobbygov.com or email support@lobbygov.com.

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Getting Started

Getting started

This article shows you how to sign in to LobbyGov Legacy, what the Dashboard shows, and where to find each feature in the menu.

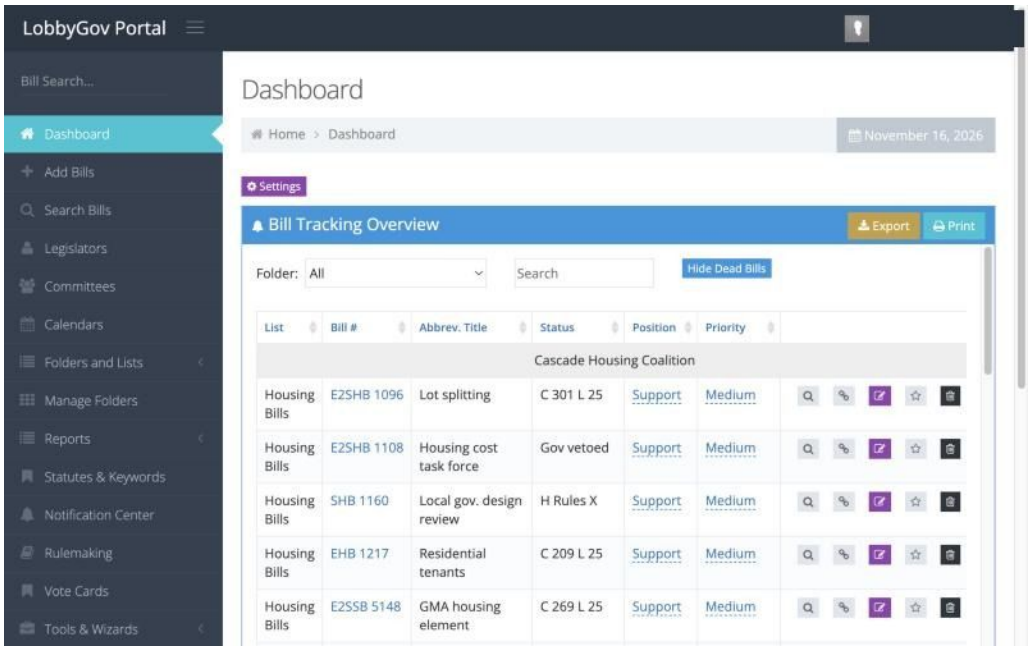
Sign in

1. Go to **portal.lobbygov.com/login**.
2. Enter your **Username** and **Password**.
3. Optionally tick **Remember me** to stay signed in on that browser for up to 30 days.
4. Click **Login**.

If you were invited to an account, use the link in the email titled "LobbyGov Invitation from …" first. The link works for 7 days.

The Dashboard

After you sign in you land on the **Dashboard**, unless you have chosen a tracking list as your start page in Preferences.



The Dashboard has two panels:

- **Bill Tracking Overview** lists the bills on your tracking lists, grouped by folder. Choose a folder in **Folder**, type in **Search**, or click **Hide Dead Bills**. You can change a bill's **Position** and **Priority** by clicking the value. The icons on each row open the bill's details, open the legislature's page for the bill, edit the bill, add it to or remove it from your Watch List, and delete it from the list.

- **Upcoming Events** lists committee events for your bills, with the committee, event type, location and time.

Each panel has **Export** (a CSV file) and **Print**. Click **Settings** above the panels to choose which folders and lists feed the overview and which columns and bills are shown.

The menu

Everything is in the menu on the left. You only see the items your plan and permissions include.

Menu item	What it's for
Bill Search...	Quick bill search from any page
Dashboard	Bill Tracking Overview and Upcoming Events
Add Bills	Add bills to tracking lists one at a time, several at once, or from intro sheets
Search Bills	Search a state's bills by session, number or keyword
Legislators, **Committees**	Legislator directory and committee information
Calendars	Event calendar, weekly planner and calendar feed
Folders and Lists	Global Tracking View, your Watch List and every tracking list you can see
Manage Folders	Create and organize folders and tracking lists, and share folders
Reports	Generate, schedule and distribute reports
Statutes & Keywords	Track keywords and statutes in bill text
Notification Center	Choose which emails you receive
Rulemaking	Agency rulemaking filings
Vote Cards	Count votes on legislation
Tools & Wizards	Cutoff Wizard, It's Alive! Tool, Scorecards, Export Data, Bill Comparison
DonorPAC	Political contribution tracking, for accounts that have it
Account Settings	Your Profile, Subusers & Sharing, Account Details, Preferences
Support	Opens this help center

The menu at the top right, under your name, has **Profile Settings** and **Log Out**.

Roles

- **Super User:** the account administrator. Has every standard feature, manages users and sharing, and creates folders.
- **Billing:** can open **Account Details** to see billing information, invoices and payments.
- **Regular User:** tracks bills in the folders and lists shared with them. Access to each feature is switched on per person by a super user.

If a menu item is missing

Features depend on your account's plan, the permissions your super user gave you, and the states your account covers. If something described in these articles doesn't appear for you, ask your account's super user or contact support@lobbygov.com.

LobbyGov Legacy new user and refresher webinar

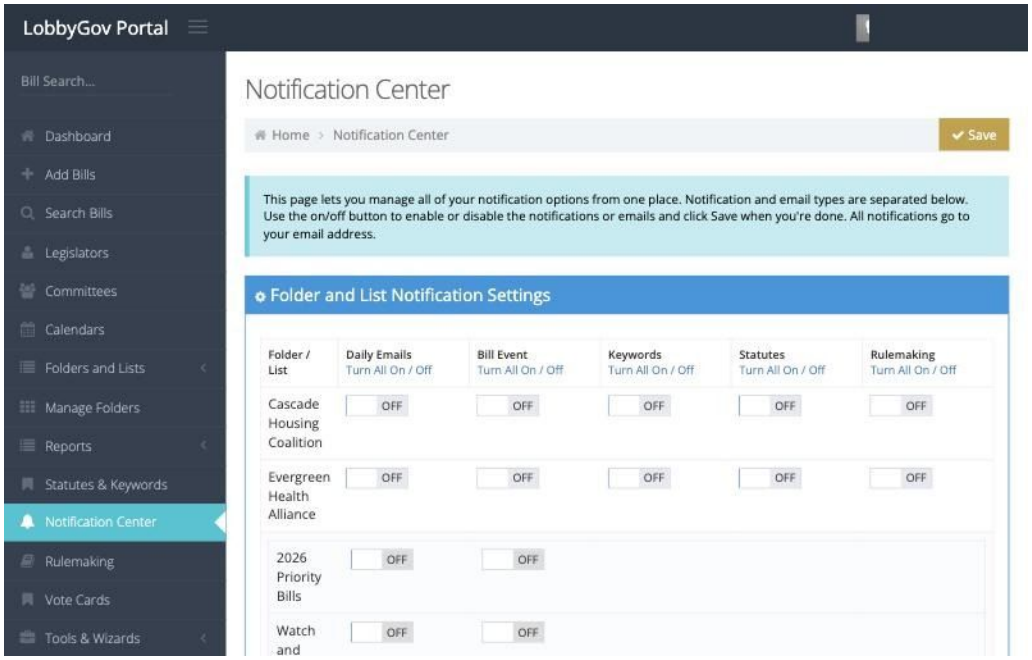
This is a recording of a live webinar held in December 2023 for new and returning users. It provides an overview of the LobbyGov bill tracking, calendaring, and reporting features. If you have any questions about features or issues not addressed in this webinar, please reach out to support@lobbygov.com anytime.

You can watch the video below or visit the video here: https://vimeo.com/896307324/b672a5843d

Watch the video: https://vimeo.com/896307324?h=b672a5843d

Choose which emails you get from LobbyGov Legacy

The **Notification Center** is one page for every email LobbyGov can send you. All notifications go to the email address on your profile.



Turn emails on or off

1. Click **Notification Center** in the menu.
2. Under **Folder and List Notification Settings**, find the folder or list and switch each kind of email on or off:
   - **Daily Emails:** a daily summary for the bills you track.
   - **Bill Event:** an email when a tracked bill is scheduled for an event.
   - **Keywords** and **Statutes:** an email when new bill text matches something you track.
   - **Rulemaking:** an email about agency rulemaking filings you follow.
3. To switch a whole column at once, click **Turn All On / Off** under its heading.
4. Under **Other Notification Options**, choose whether to get the **LobbyGov Newsletter**, **New Features & Updates**, the **New Rulemaking Register** notice and **Watch List Alerts**.
5. Click **Save** at the top right.

The Keywords, Statutes and Rulemaking columns appear only if you have those permissions and your states support them.

Emails you can't turn off here

Account emails are always sent when they apply: invitations, email verification, password resets and username reminders. Scheduled reports are controlled under **Reports > Delivery Scheduling**.

Usernames and Passwords

Signing in, resetting passwords, and single sign-on.

Log in to your LobbyGov Legacy account

You can reach the LobbyGov Legacy login page two ways:

- Go directly to https://portal.lobbygov.com.
- Go to www.lobbygov.com and click the **Log In** link at the top of the page.

Sign in

1. Enter your **Username** and **Password**. Your username is not necessarily your email address.
2. Optionally tick **Remember me** to stay signed in on that browser for up to 30 days.
3. Click **Login**.

If your account uses two-factor authentication, you are then asked for a **Verification Code**. Enter the code from the Authy app, or click **request via SMS** to get it by text message.

If your organization uses single sign-on, click **SAML Login**, enter your username and click **Submit**.

If you can't sign in

- Forgot your password? Click the link under **Forgot your password?** to reset it.
- Forgot your username? Click the link under **Can't remember your username?** to have it emailed to you.

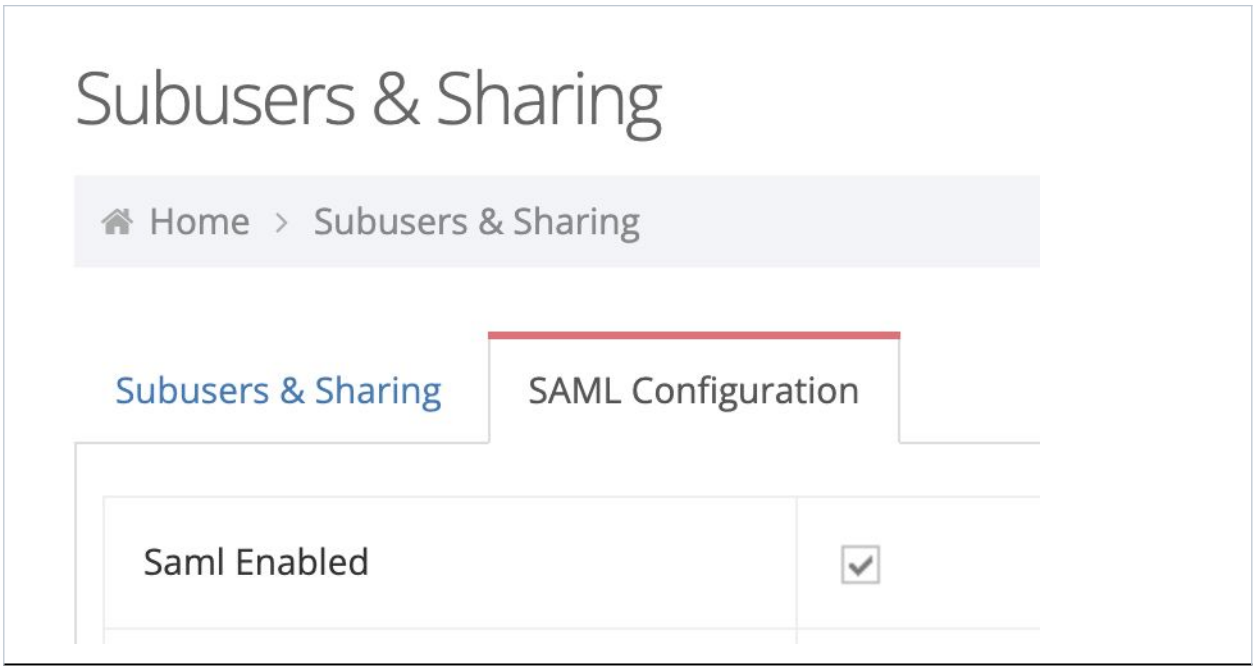
Configuring Single Sign-On using Microsoft Entra ID (formerly Azure AD)

Single Sign-On (SSO) is an Enterprise-level feature that authenticates users through your organization's user directory. This provides added security and ensures users do not have to maintain separate LobbyGov usernames and passwords. This is typically configured by IT staff within your organization. Please contact support@lobbygov.com with questions or if you'd like to schedule a meeting to walk through the configuration process.

Step 1: Login to your LobbyGov account using the primary account login or login with "Super User" level access. Visit https://portal.lobbygov.com/ to log in.

Step 2: Go to Account Settings > Subusers & Sharing. On this page, click the SAML Configuration tab. If you do not see this tab, it means your account does not have SSO/SAML authorized or there is another issue. Please contact support@lobbygov.com.

Step 3: Check the Saml Enabled checkbox.



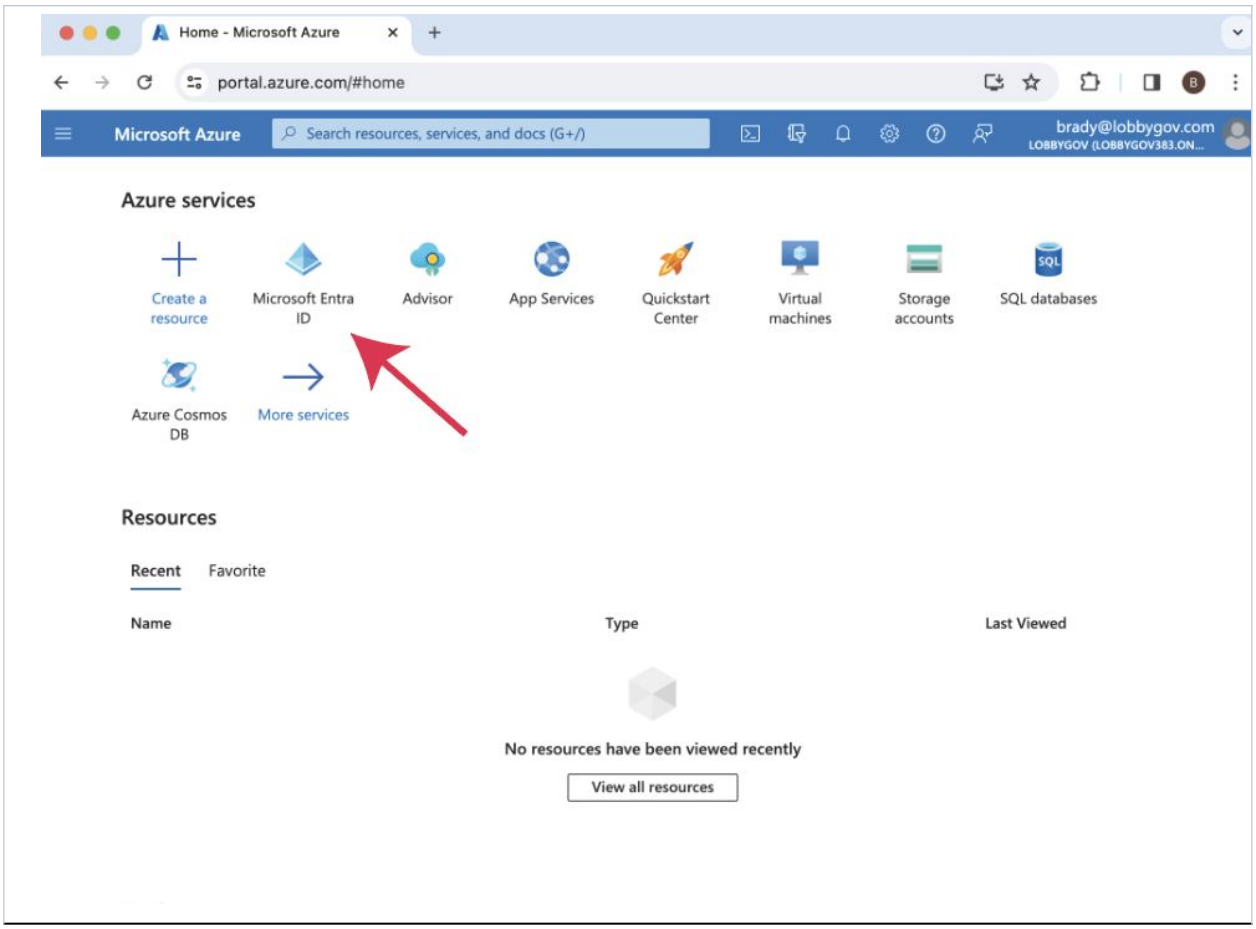
Step 4: Enter a value in the Idp Name box. We typically use "LobbyGov SSO".



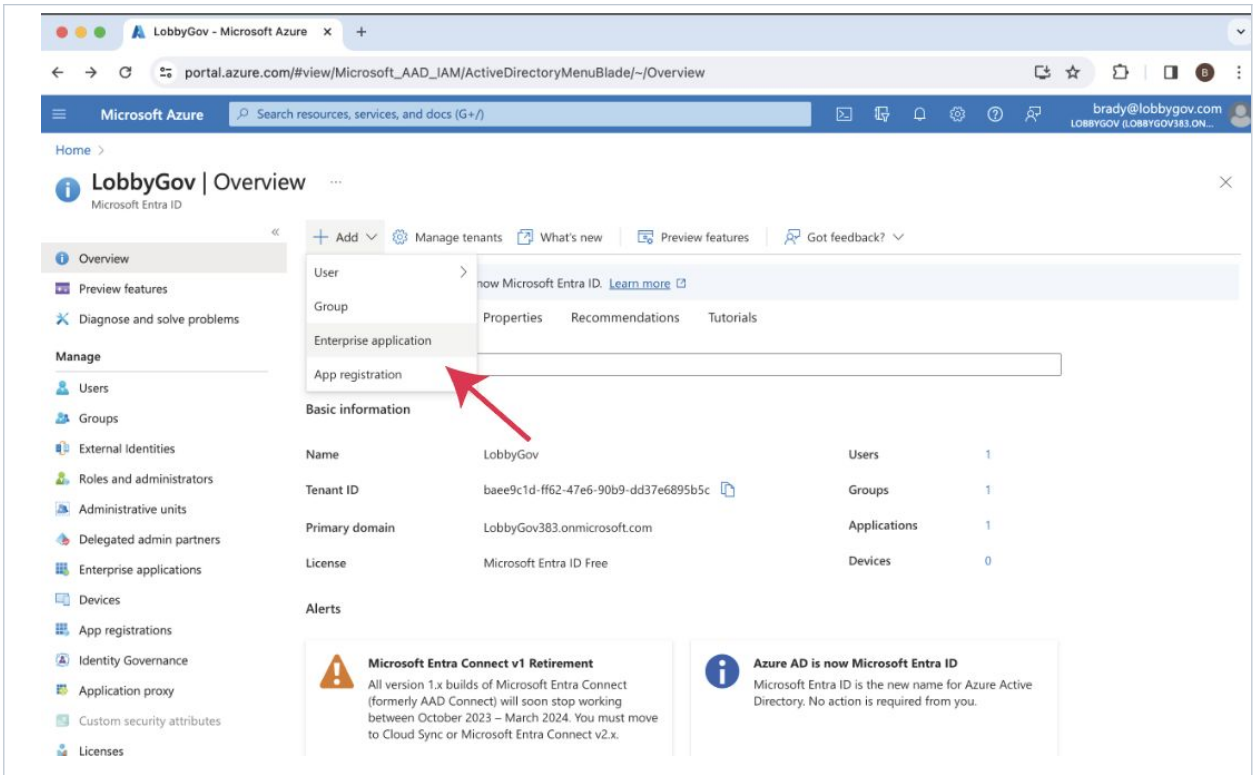
Step 5: Scroll down and click the Save button. This will enable SSO on your account. The page will reload and provide additional information you will need to configure on the Microsoft/Azure side. You should see a value in the ID field and a value in the Idp Meta Data field.



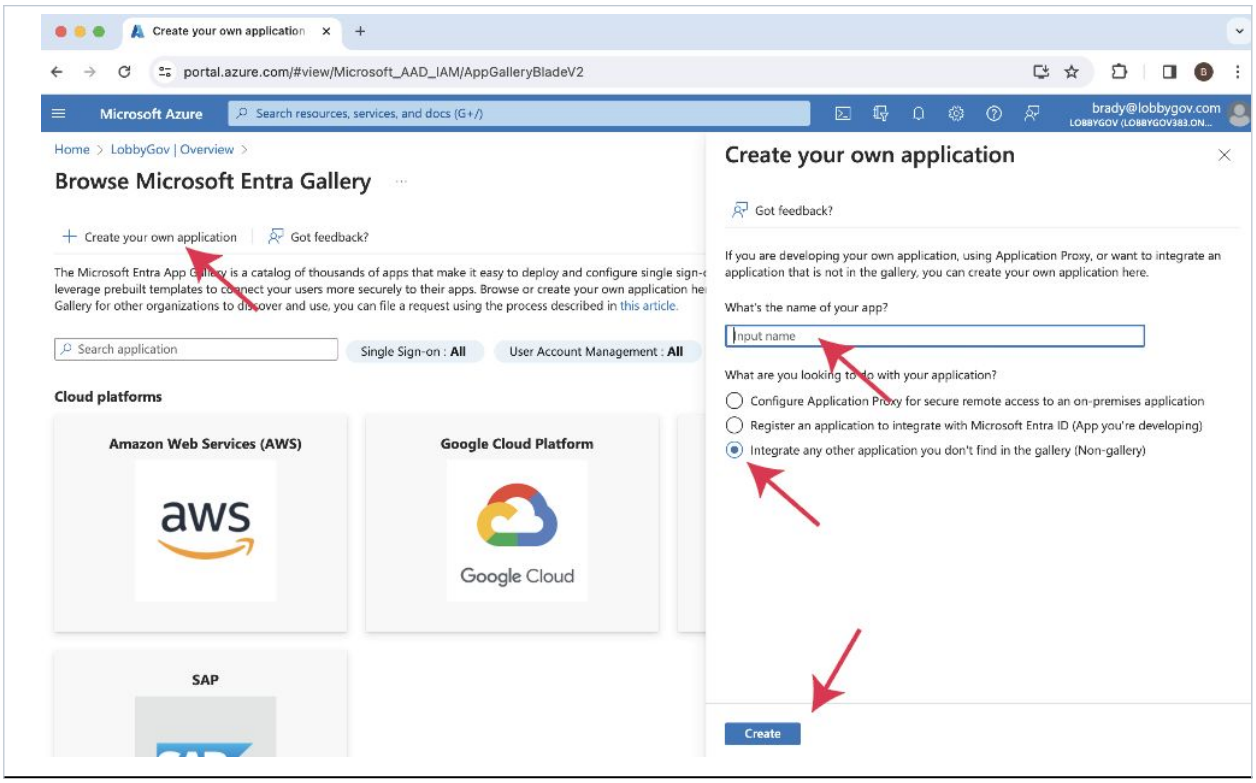
Step 6: Go to your Microsoft Azure configuration portal. Then click Microsoft Entra ID.



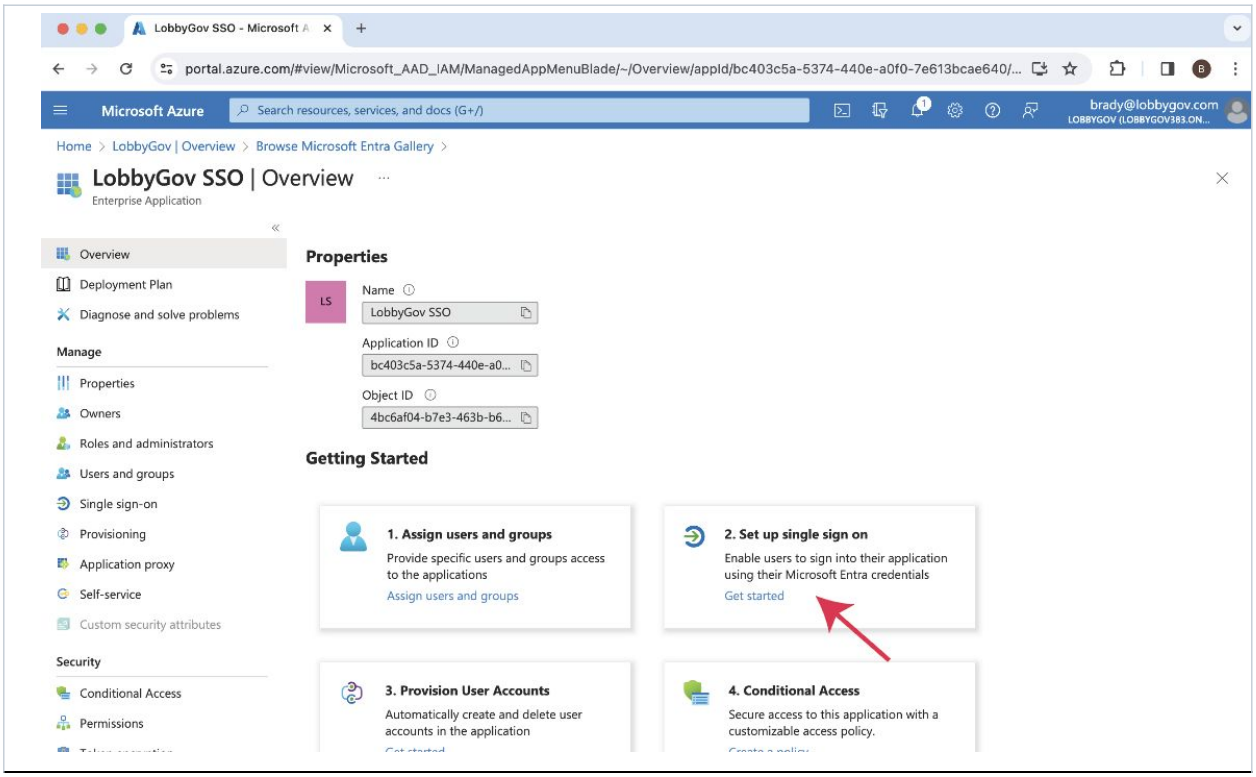
Step 7: Click the + Add button near the top of the window and then select Enterprise application from the menu that appears.

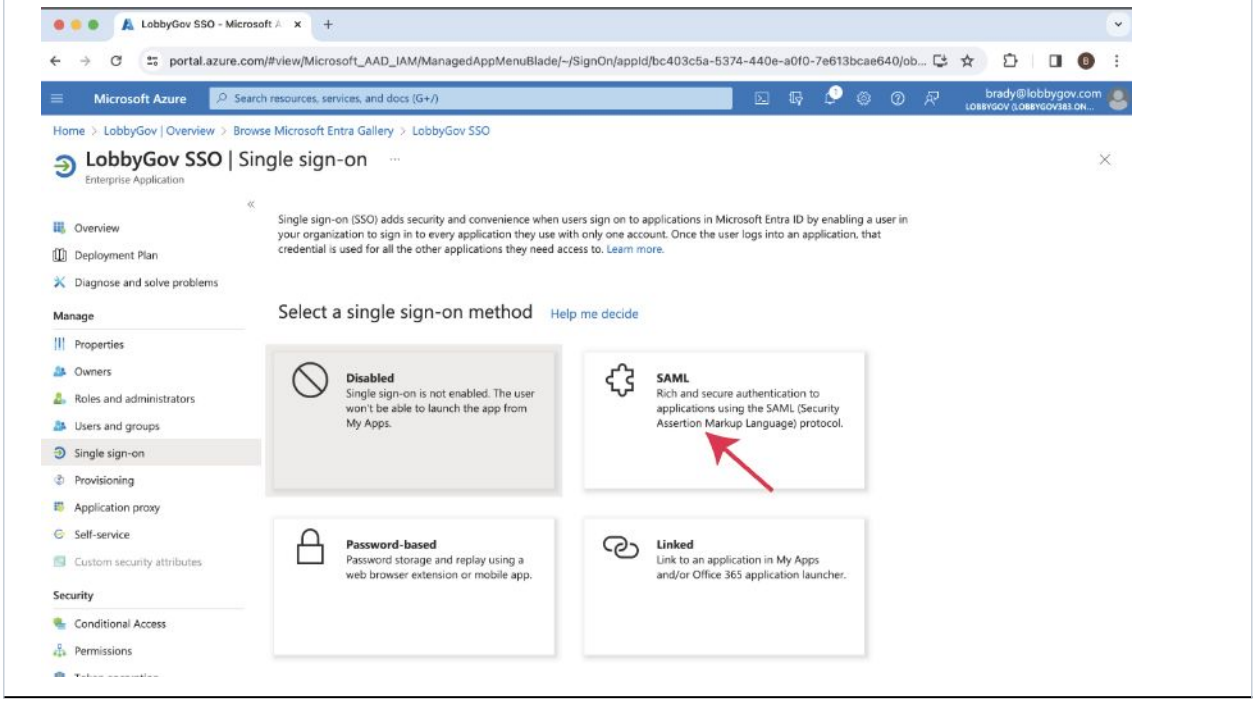


Step 8: Click + Create your own application. A window will appear that asks for the name of the app and what are you looking to do with the application. Enter LobbyGov SSO (or some other name you prefer) into the first field and make sure "Integrate any other application..." is selected. Then click Create.

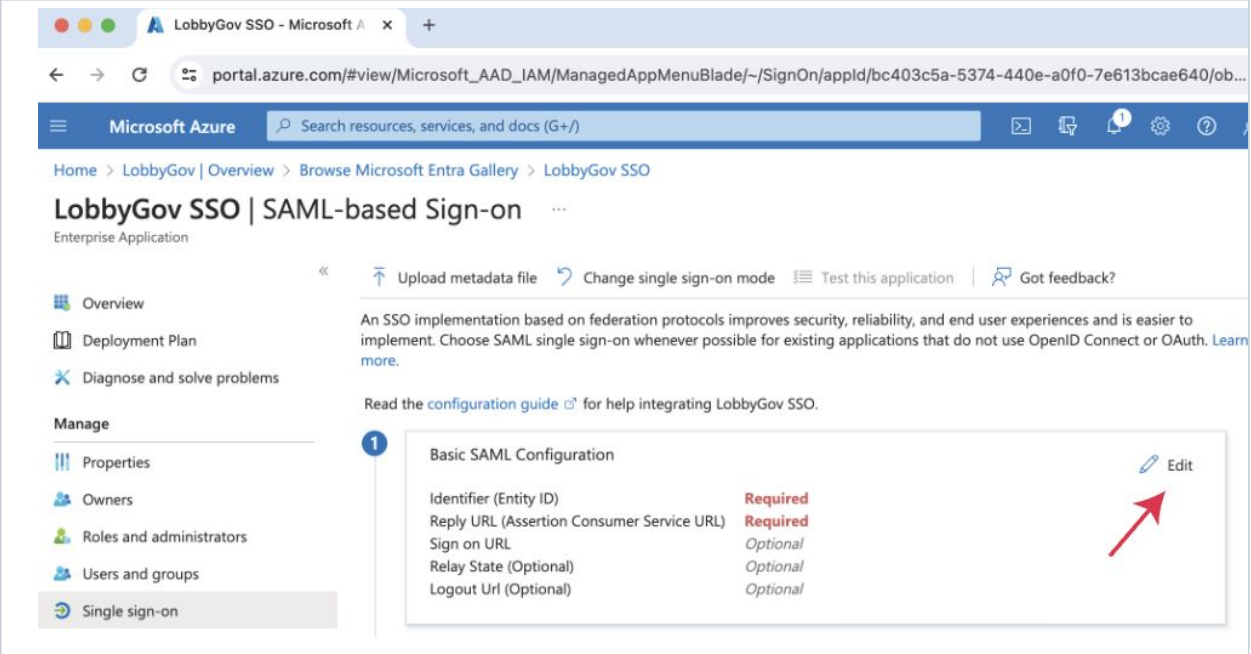


Step 9: The new application should appear. Then click "2. Set up single sign on". Then Click "SAML" on the next page that will appear.





Step 10: We now need to set some of the required fields under "BASIC SAML Configuration".
Click the Edit link in the upper right of the box.

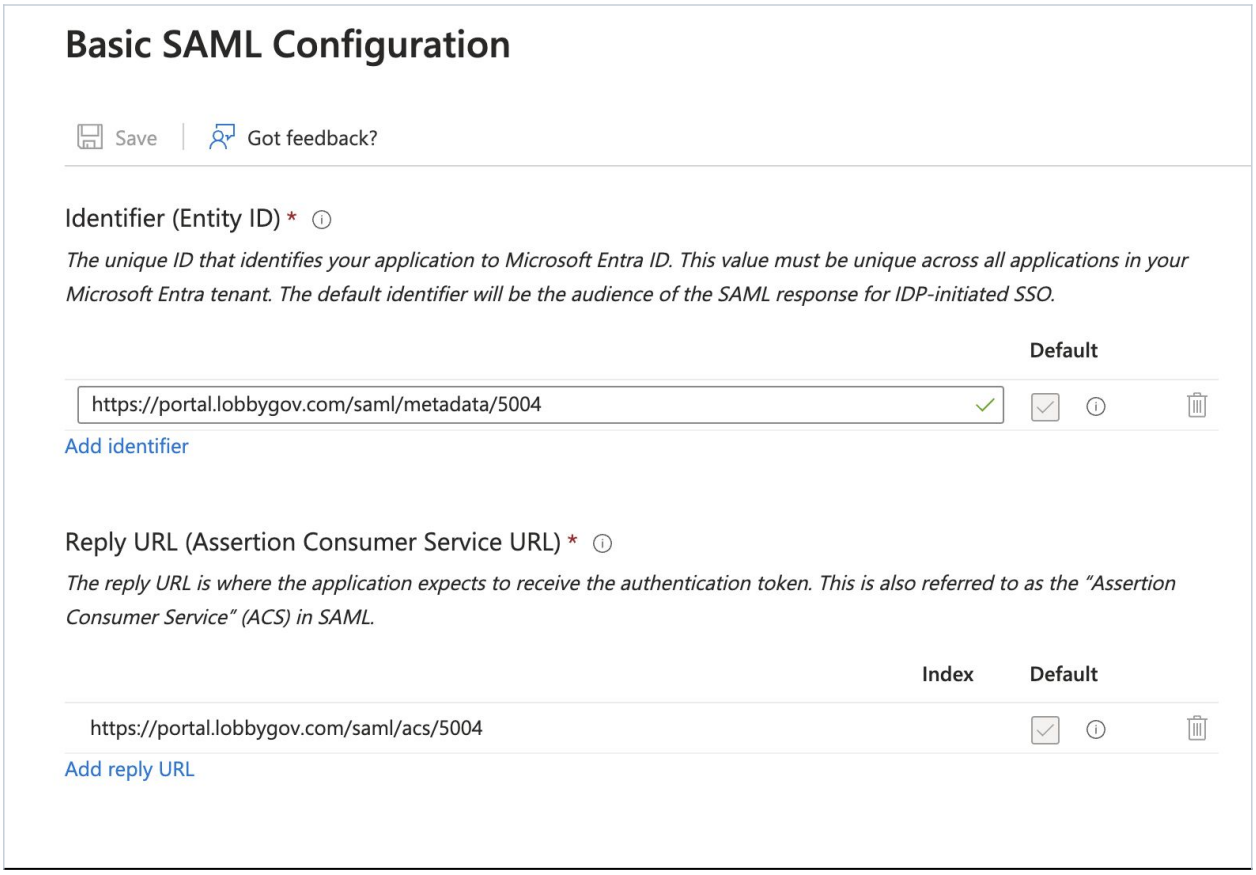


Step 11: After you click Edit, a Basic SAML Configuration window will appear.

Go back to the LobbyGov SAMl Configuration tab from Step 3 above (use a different browser window) and look for the Idp Meta Data field value. Copy that full URL (something like https://portal.lobbygov.com/saml/metadata/####) into the Indentifier (Entity ID) field.

Then enter "https://portal.lobbygov.com/saml/acs/" followed by the 4 digit ID number listed in the ID field on the LobbyGov SAML Configuration tab. So it should look something like "https://portal.lobbygov.com/saml/acs/5555".

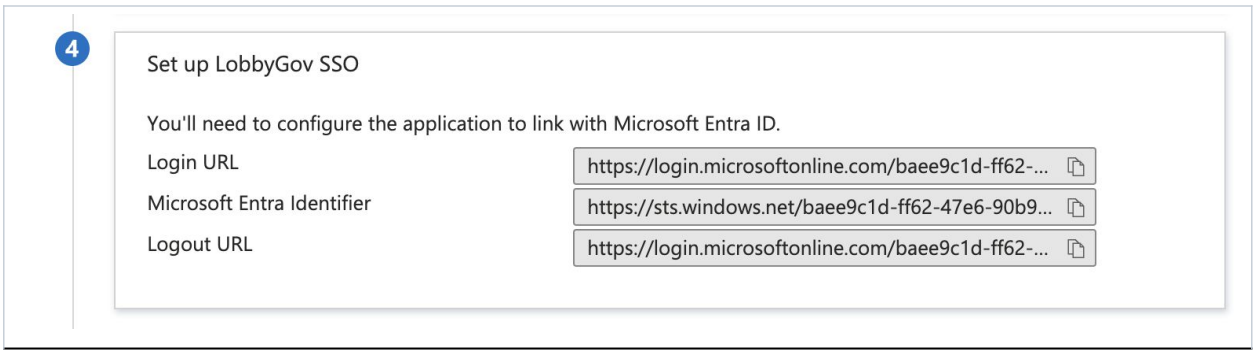
Then click "Save" at the upper left of the window. After it saves successfully, click the X on the uppor right corner of the window.



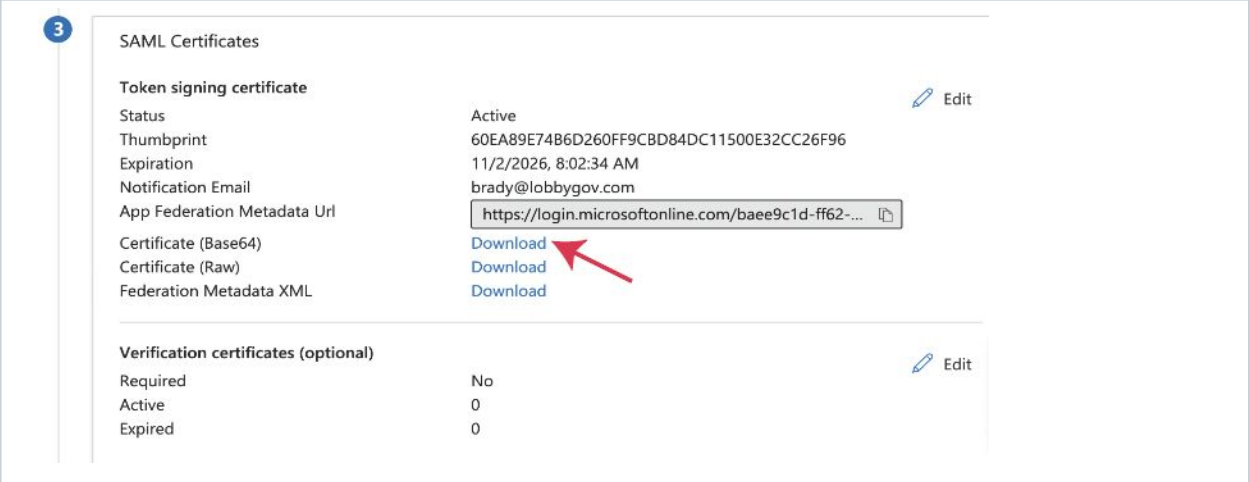
Step 12: Now we need to copy several pieces of information from the Entra ID application page into the LobbyGov SAML Configuration page.

Under the #4 panel, Set up for LobbyGov SSO, copy the Login URL. Paste that in on the LobbyGov SAML Configuration page in the Idp Single Signon Service field.

Copy the Microsoft Entra Identifier. Paste that into the Idp Entity ID field.



Step 13: Download the Certificate (Base64) and open it in Notepad or other text editor. Copy the entire contents, including ---BEGIN CERTIFICATE--- and ---END CERTIFICATE---. Then paste it into the Idp Cert text field on the LobbyGov SAML Configuration page.



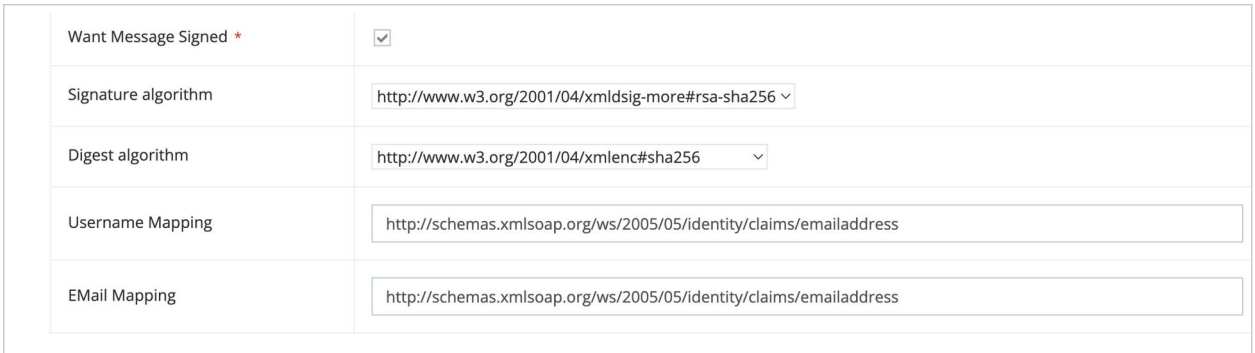


Step 14: On the LobbyGov SAML Configuration page, make a few other settings changes.

1. Check "Want Message Signed".
2. Set the Signature algorithm to http://www.w3.org/2001/04/xmldsig-more#rsa-sha256
3. Set the Digest algorithm to http://www.w3.org/2001/04/xmlenc#sha256
4. Set the Username Mapping field value to http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailaddress
5. Set the Email Mapping field value to http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailaddress

After you've entered these values, click the Save button.

**Note: These are standard settings that work for most accounts. If you have different configurations for these, you may change them.*



Step 15: Single Sign-On should now be active. You can test it by logging out of your LobbyGov account (go to your name in the upper right corner and choose Log Out. Then go to https://portal.lobbygov.com/, click SAML Login under the Login button, and enter your LobbyGov username. It should then authenticate you through your organization. If you receive an error message and are unable to resolve it, please send a copy of the error message to support@lobbygov.com.

Update your profile and secure your LobbyGov Legacy account

Your profile holds your name, email, time zone and password. Open it from **Account Settings > Your Profile**, or from **Profile Settings** under your name at the top right.

Update your details

1. Change any of **Username**, **Email**, **First Name**, **Last Name**, **Phone** and **Timezone**.
2. Optionally upload a **Profile Photo** (GIF, JPG, PNG or BMP, up to 1 MB).
3. Click **Save**.

All LobbyGov notifications go to the email address on your profile. If you see "The username is unavailable" or "This email address has existed", someone else already uses that username or email.

Change your password

1. Enter your **Current Password**.
2. Enter the **New Password** and **Retype New Password**.
3. Click **Save**.

Password rules

A password must be 7 to 20 characters. Numbers, upper- and lower-case letters and symbols are recommended.

If your organization has advanced password security turned on, a password must also:

- Be 10 characters or longer.
- Include a number, a lower-case letter, an upper-case letter and a special character.
- Not contain your username, first name or last name.

- Not be a dictionary word.
- Not match or closely resemble your current password or your previous four.

With advanced password security, five failed sign-in attempts lock your login for 15 minutes. Your account's super user can lift the lock early with **Unlock User** on the Subusers & Sharing page.

Two-factor authentication

Two-factor authentication asks for a code from your phone each time you sign in with your password.

1. On **Your Profile**, turn on the **Two-factor Authentication** switch.
2. Enter your cell phone's country code and number, and submit.
3. Click **Save** on the profile page.

From then on, after you enter your username and password you see a **Verification Code** page. Enter the code from the Authy app, or click **request via SMS** to get it by text message, then click **Submit**.

To turn it off, switch **Two-factor Authentication** off on Your Profile and click **Save**.

If your organization uses single sign-on

Click **SAML Login** on the login page, enter your username and click **Submit**. You are sent to your organization's sign-in page and returned to LobbyGov signed in. If your administrator has turned off password access for you, your username, email and name are managed by your organization and can't be changed on Your Profile.

Retrieve your LobbyGov Legacy username

If you can't remember your username, LobbyGov can email it to you.

1. Go to the login page at https://portal.lobbygov.com.
2. Under **Can't remember your username?**, click the link to have it emailed to you.
3. Enter your email address and click **Submit**.

LobbyGov sends an email titled "LobbyGov Retrieve Username". It lists every username linked to that email address.

If you don't remember which email address is on file, contact your account administrator or email support@lobbygov.com.

Reset your LobbyGov Legacy password

For your security, LobbyGov passwords are encrypted and can't be retrieved. You can reset yours instead.

1. Go to the login page at https://portal.lobbygov.com.
2. Under **Forgot your password?**, click the link to reset your password.
3. Enter your **Username** and click **Submit**.

4. Open the email titled "LobbyGov Password Reset" and click the link in it. The link works for 24 hours and can be used once.
5. Enter your new password twice and click **Submit**.

You return to the login page and can sign in with the new password. A password must be 7 to 20 characters; organizations with advanced password security require 10 or more, with a number, upper- and lower-case letters and a special character.

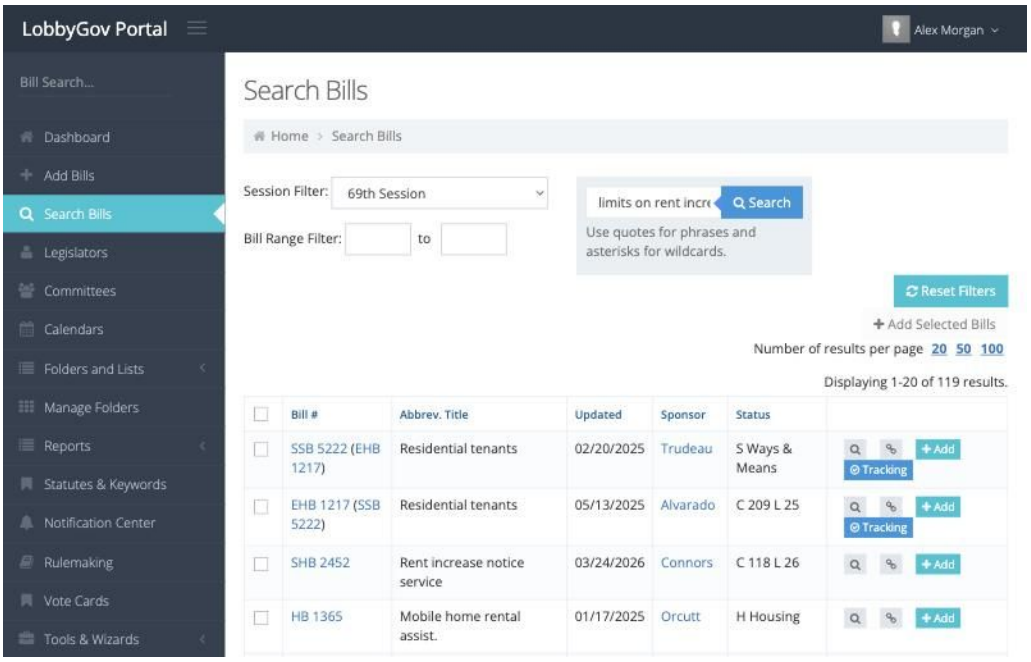
If something goes wrong

- **"Username doesn't exist!"** Check the spelling, or retrieve your username first.
- **"Invalid or expired Key!"** The reset link has expired or was already used. Start again from step 1.

Bill Tracking

Search for bills

Search Bills finds bills by number, by exact words, or by a plain-language description of what you're looking for. Regular users need the Search Bills permission.



Run a search

1. Click **Search Bills** in the menu. If your account covers several states, choose the state.
2. Pick a session in **Session Filter**. You can choose a whole session or one half of the biennium.
3. Optionally enter a range of bill numbers in **Bill Range Filter**.
4. Type your search and click **Search**.

Click **Reset Filters** to start over. Choose 20, 50 or 100 results per page. For a quick search from any page, type in the **Bill Search...** box at the top of the menu.

Three ways to search

What you type	Example	What you get
A bill number	`1217` or `HB 1217`	That bill
Plain language	`limits on rent increases for tenants`	Bills about that subject, best match first
An exact search	`"rent increase" AND mobile NOT tax`	Only bills that contain exactly what you asked for

Search in plain language

Type what you're looking for the way you would say it, such as `limits on rent increases for tenants` or `insurance coverage for telehealth visits`. You don't need to guess the words a bill uses.

LobbyGov looks for your words in each bill's number, title, digest, description, sponsors and full text, and it also looks for bills whose meaning is close to what you typed. That means:

- **You can find bills that use different wording.** A search for rent increases can find a bill about residential tenants even if it never uses your exact phrase.
- **Bills about your subject come first.** A bill whose title, digest or opening text is about your subject ranks above a long bill that only mentions it in passing.
- **Word endings don't matter.** Searching `education` also matches words such as educational.
- **You can search by sponsor.** A sponsor's last name is part of what is searched.

A plain-language search shows up to the 200 best matches. If you need every bill that contains a word or phrase, use an exact search.

Run an exact (advanced) search

Your search becomes an exact search as soon as it contains quotes, an asterisk, or one of the words AND, OR or NOT. An exact search uses keywords only, so every result contains what you asked for, and there is no 200-result limit.

To do this	Type this	Example
Find an exact phrase	Quotes around the phrase	`"prior authorization"`
Find any word that starts a certain way	An asterisk at the end	`educat*` finds education, educator, educational
Require both terms	AND	`housing AND zoning`
Accept either term	OR	`telehealth OR telemedicine`
Leave out a term	NOT	`tenant NOT commercial`
Combine them	Any mix of the above	`"rent increase" AND mobile NOT tax`

Tips for exact searches:

- Type AND, OR and NOT in capital letters, with a space on each side. In lower case they are treated as ordinary words.
- When you list several words without OR, a bill must contain all of them.
- The asterisk goes at the end of a word, not the beginning.

Which kind of search to use

- **Exploring a subject, or unsure of the wording:** use plain language.
- **Looking for a specific term, statute phrase or program name:** put it in quotes.

- **Too many results:** add AND with a second term, add NOT to remove a subject, or narrow the session or bill range.
- **Too few results:** remove the quotes, use OR with another term, or describe it in plain language.

Read the results

Each row shows the **Bill #** (with any companion bill in brackets), **Abbrev. Title**, **Updated** date, **Sponsor** and **Status**. The buttons on the right of each row:

- **Bill Details** (magnifier): status, title, sponsors, digest and history.
- **Legislature Page** (link icon): opens the official bill page in a new tab.
- **+ Add**: adds the bill to your tracking lists.
- **Tracking**: appears when the bill is already on one of your lists. Click it to see which.

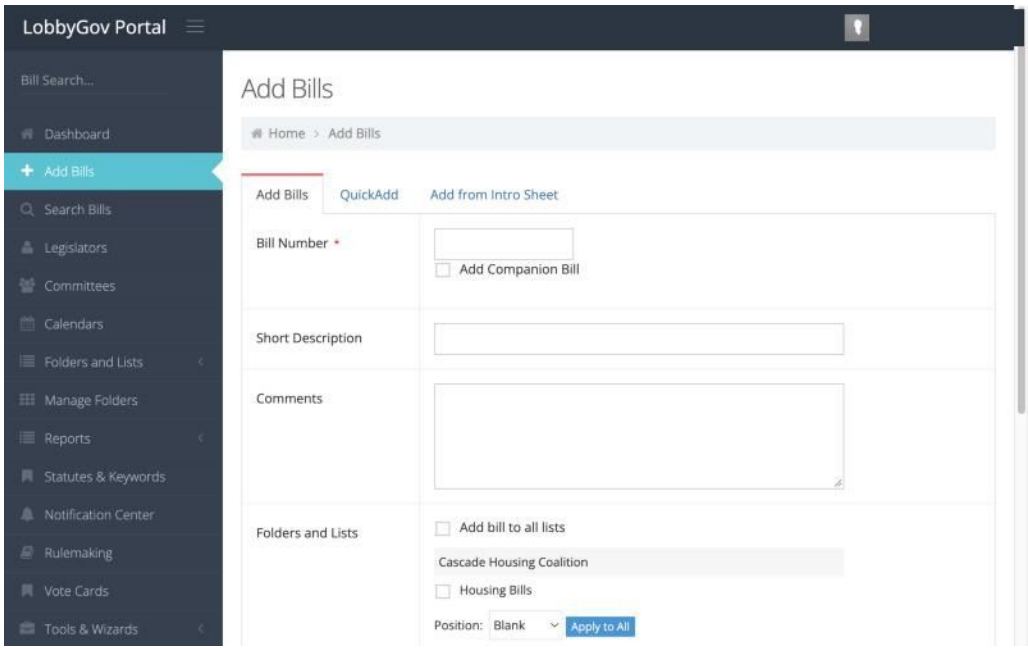
Add bills from the results

- To add one bill, click **+ Add** on its row.
- To add several, tick their boxes and click **Add Selected Bills**.

To be emailed when new bills match a word or phrase, save it as a keyword under **Statutes & Keywords**.

Add bills to a tracking list

The **Add Bills** page adds bills to one or more tracking lists. It has three tabs: **Add Bills** for one bill, **QuickAdd** for several, and **Add from Intro Sheet** for bills on a daily introduction sheet. Regular users need the Add Bills permission.



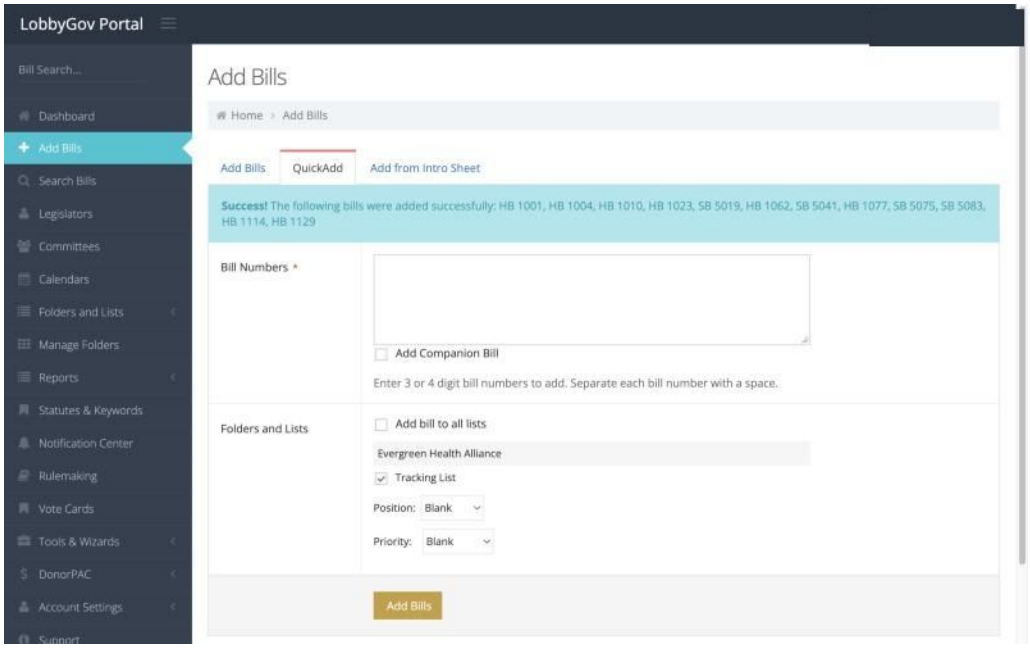
Add one bill

1. Click **Add Bills** in the menu.
2. Type the **Bill Number**. LobbyGov checks it as you type and tells you if the number is invalid, if several bills share it, or if the bill is already on one of your lists.
3. Optionally tick **Add Companion Bill**, and fill in **Short Description** and **Comments**.
4. Under **Folders and Lists**, tick each list you want the bill on. **Add bill to all lists** ticks every list; in a folder that has a primary list, only the primary list is ticked.
5. Set **Position** and **Priority** for each folder. **Apply to All** copies your choice to the other folders.
6. Click **Add Bills**.

Add several bills with QuickAdd

1. Click the **QuickAdd** tab.
2. In **Bill Numbers**, enter 3 or 4 digit bill numbers separated by spaces. For example: `1001 1004 5019`.
3. Tick the lists and set **Position** and **Priority**, as above.
4. Click **Add Bills**. The page lists the bills it found for those numbers.
5. Tick the bills you want and click **Add Bills** again.

A green message lists the bills that were added. Bills already on a chosen list are skipped.



Add bills from an intro sheet

This tab appears in states that publish daily introduction sheets.

1. Click the **Add from Intro Sheet** tab.
2. Choose the **Chamber**, then the sheet under **Select Intro Sheet**.
3. Under **Select Entry Mode**, choose one of:

- One set of tracking lists for every bill you select. This is faster.
- Different tracking lists, short descriptions, positions, priorities and categories for each bill.

4. Tick the bills, then click **Add Bills**.

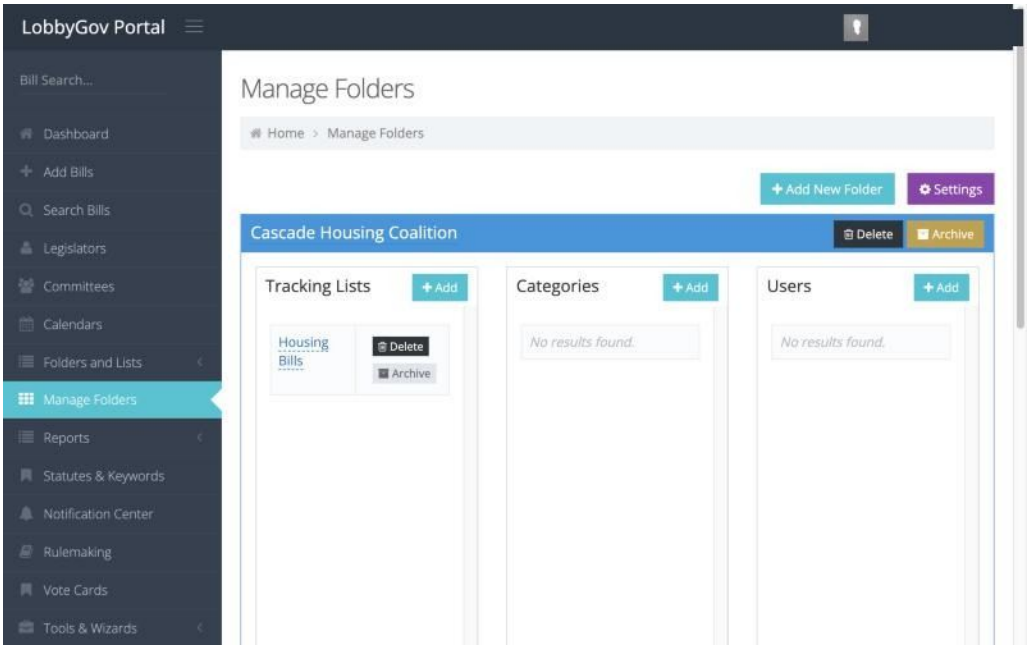
Set defaults for new bills

To pre-fill the position, priority, short description, comments or companion bill each time, go to **Account Settings > Preferences > Adding and Editing Bills**.

Create and manage folders and tracking lists

A **folder** holds tracking lists and decides who can see them. A **tracking list** is a list of bills for one state. Many accounts use one folder per client or issue area. Your account may use a different word for "folder", such as "Client".

You manage both on the **Manage Folders** page. You need the Manage Folders permission, and only super users can create folders.



Create a folder

1. Click **Manage Folders** in the menu.
2. Click **+ Add New Folder**.
3. Enter a **Short Description**. This is the folder's name. **Long Description** is optional.
4. Leave **Create a new tracking list** ticked to start the folder with a list called "Tracking List".
5. Click **Save**.

Create a tracking list

1. In the folder's **Tracking Lists** panel, click **+ Add**.

2. Choose the **State**, if your account covers more than one, and enter a **Name**.

Your plan sets how many active tracking lists the account can have. At the limit you'll see "The account … has created the max number of lists allowed by the service plan." Archive or delete a list, or contact LobbyGov about your plan.

Rename, archive or delete

- **Rename:** click the folder's or list's name and edit it in place.
- **Archive:** an archived list is kept but can't be opened, and it doesn't count toward your list limit. Archiving a whole folder stops reports and updates for it until you unarchive it.
- **Delete:** click **Delete** and type **DELETE** to confirm. Deleting a folder deletes all of its lists. This can't be undone.
- **Mark as Primary:** one list per folder can be primary. It is the list that **Add bill to all lists** picks in that folder.

Add categories

In the folder's **Categories** panel, click **+ Add** and enter a name. Categories group the bills on that folder's lists, for example by issue. Categories depend on your plan.

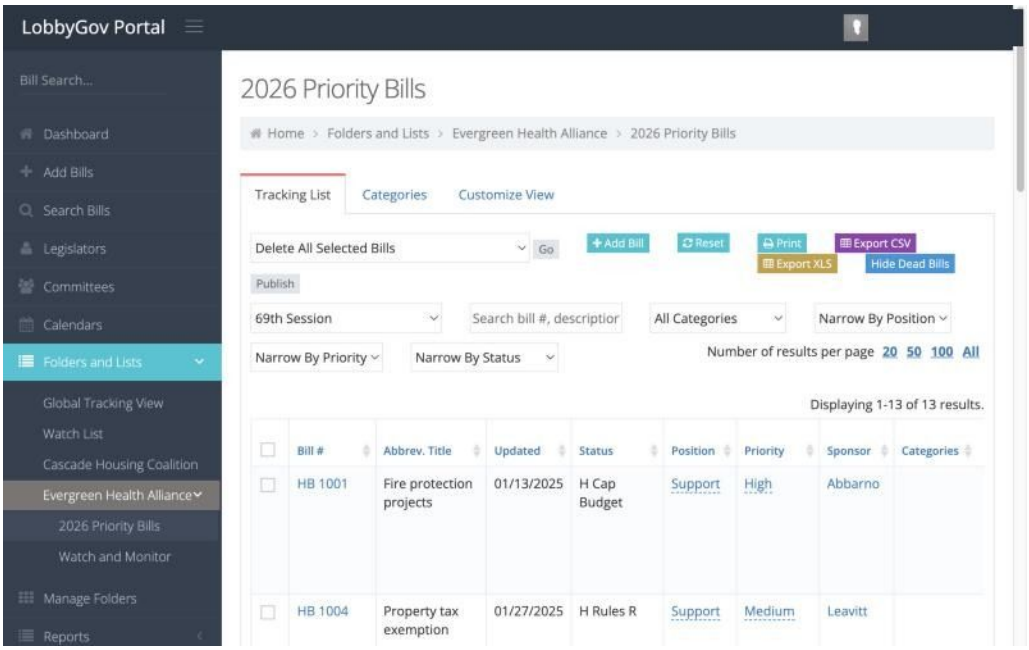
Share a folder

1. In the folder's **Users** panel, click **+ Add** and tick the people to share with. Only people already on your account with the Regular User role appear.
2. Click the gear icon next to a person and choose **Full Access**, **View** or **Add/Edit/Delete**.

To take access away, click **Remove Access**.

Work with a tracking list

Open a tracking list from **Folders and Lists** in the menu. The page has three tabs: **Tracking List**, **Categories** and **Customize View**.



Toolbar and filters

- **+ Add Bill:** add a bill without leaving the list. You need edit access.
- **Reset:** clear your filters.
- **Print**, **Export CSV** and **Export XLS**.
- **Hide Dead Bills** / **Show Dead Bills**.
- **Publish:** create a public, read-only copy of the list.

Below the toolbar you can filter by session, bill number or description, category, **Narrow By Position**, **Narrow By Priority** and **Narrow By Status**, and choose 20, 50, 100 or All results per page.

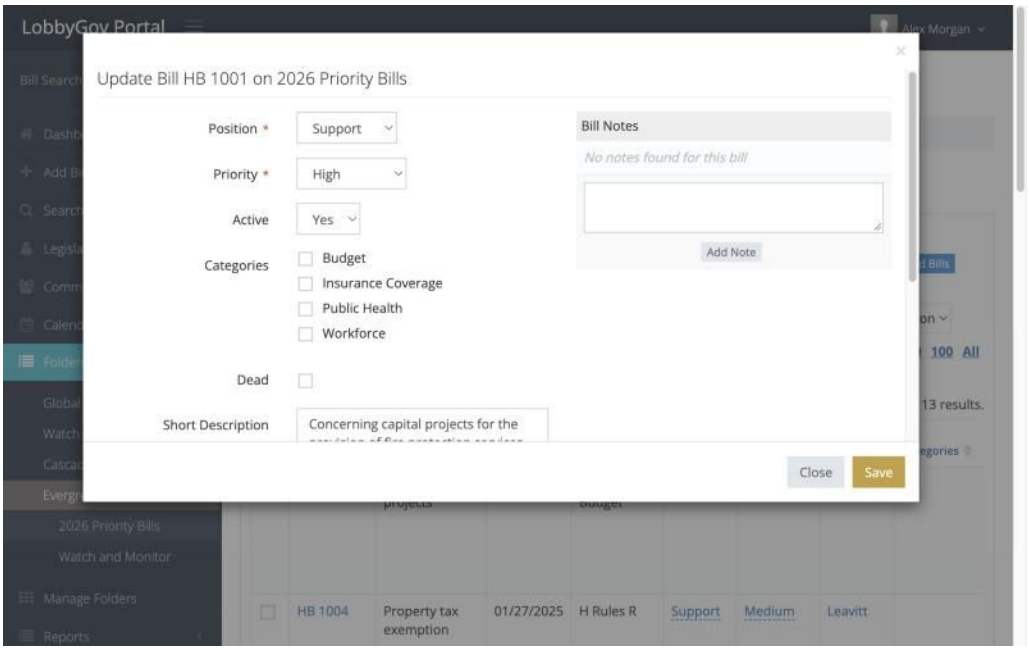
If a bill you know is on the list doesn't appear, check the session filter. A list can hold bills from more than one session.

Change a position or priority

Click the value in the **Position** or **Priority** column, choose a new one, and it saves straight away.

Edit a bill

Click the purple **Edit Bill** button at the right of the bill's row.



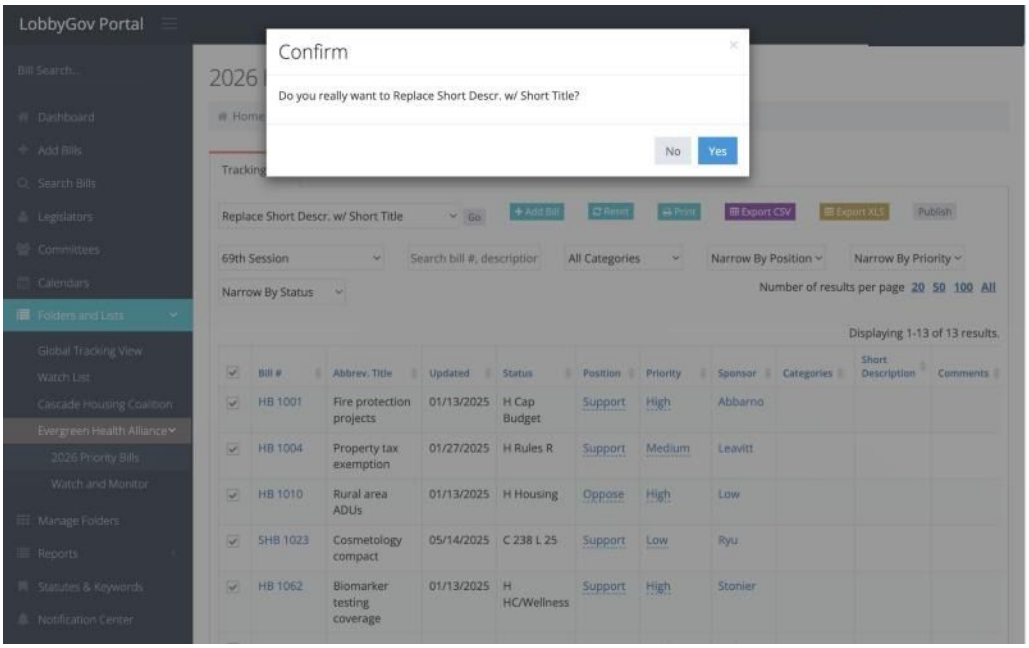
You can set:

- **Position** and **Priority** (both required).
- **Active** (Yes or No) and **Dead**.
- **Categories**.
- **Short Description** and **Comments**. Tick **Apply to same bill in other tracking lists** to copy your text to the same bill on your other lists.
- **Bill Notes:** type a note and click **Add Note**. Click the trash icon to delete a note.

Click **Save**.

Change several bills at once

1. Tick the bills. The box in the header row ticks every bill on the page.
2. Choose an action from the dropdown at the top left.
3. Click **Go**, then **Yes** to confirm.



The actions are:

- **Delete All Selected Bills**
- **Mark Selected Bills as Dead** / **Mark Selected Bills as Alive (Uncheck Dead)**
- **Add Selected Bills to Watch List**
- **Change All Selected to Inactive** / **Change All Selected to Active**
- **Replace Short Descr. w/ Short Title**
- **Replace Comments with Digest**
- **Clear Position Values** or **Change Position to …**
- **Clear Priority Values** or **Change Priority to …**

Depending on your account, the list may also include copying bills to other lists and adding bills to a category.

Choose your columns

1. Click the **Customize View** tab.
2. Drag the column names into the order you want.
3. Untick **Show on List** for any column you want to hide.
4. Save. To use the same layout on every list, tick **Apply to all lists** first.

The layout is personal to you. Other people on the account keep their own.

Publish a list

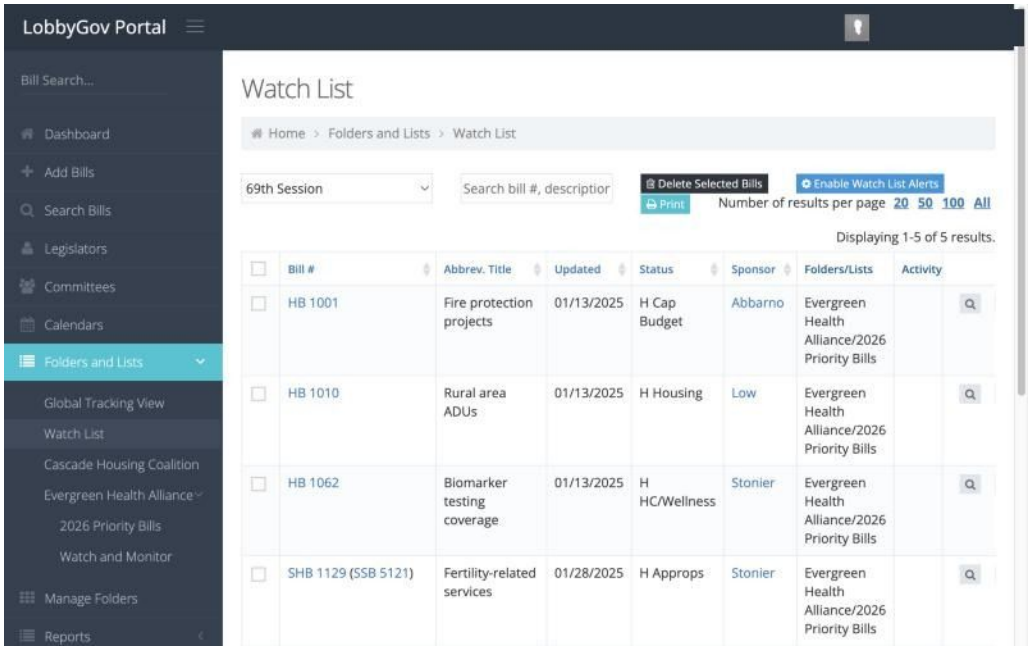
Click **Publish** and switch it on to get a **URL for Sharing** and **Code for embedding** on a website. Anyone with the link can see the published list without signing in. Switch it off to stop sharing.

Use the Watch List and Global Tracking View

Both views are under **Folders and Lists** in the menu. The **Watch List** is your personal short list of bills. The **Global Tracking View** shows every bill on every list you can see.

Watch List

Each user has their own Watch List. It has no positions or priorities, and you can get email alerts about the bills on it.



Add bills to your Watch List

- On a tracking list or the Dashboard, click the star on a bill's row.
- On a tracking list, tick several bills, choose **Add Selected Bills to Watch List** and click **Go**.
- In the Global Tracking View, tick **Include in Watch List** when you edit a bill.

Remove bills

Tick the bills and click **Delete Selected Bills**. This removes them from your Watch List only; they stay on your tracking lists.

Turn on alerts

Click **Enable Watch List Alerts** to get an email when a new event is added to any bill on your Watch List. You can also turn Watch List alerts on or off in the **Notification Center**.

Global Tracking View

This view lists every bill on the lists you can read, for the session you choose. The **Folders/Lists** column shows where each bill is tracked.

Change a bill on every list

1. Type the number in **Enter Bill #** and click **Edit**.
2. Change the position, priority, active or dead status, short description or comments.

3. Tick **Apply these changes to all the Lists** and save.

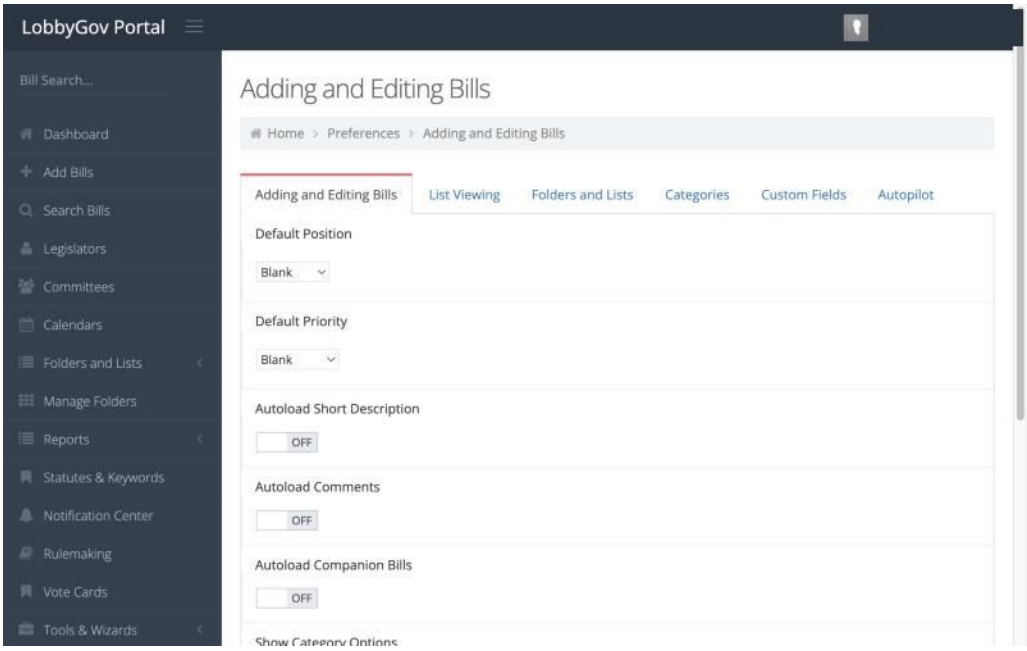
Mark several bills dead or inactive everywhere

1. Tick the bills.
2. Choose an action from **Select Action for Selected Bills**: dead or alive across all lists, or inactive or active across all lists.
3. Click **Go**.

Lists you can't edit are marked "(No Permission)" and are not changed.

Set your bill tracking preferences

Account Settings > Preferences controls the defaults for adding bills, how lists are displayed, and your categories and custom fields. The page has six tabs.



Adding and Editing Bills

These defaults apply each time you add a bill:

- **Default Position** and **Default Priority**.
- **Autoload Short Description**, **Autoload Comments** and **Autoload Companion Bills:** fill these in for you when you add a bill.
- **Show Category Options:** show the categories when you add a bill.
- **Automatically check apply changes to other lists option:** pre-ticks "Apply to same bill in other tracking lists" when you edit a bill.

List Viewing

- **Number of Bills Per Page:** 20, 50, 100 or All.
- **Sort Column** and **Sort Direction**.

- **Show Active Column**, **Show Dead Column**, **Show Companion Column** and **Show Date Added Column**.
- **Tracking List Start Page:** the list you land on after signing in, instead of the Dashboard.

Folders and Lists

Tick which folders appear in your menu. Hidden folders are still available to you; they are only removed from the menu.

Categories

Categories group bills on a list, for example by issue area. Click **+ Add**, enter a name and choose whether it applies to the whole account, one folder or one list. Click a category's name to rename it. Categories depend on your plan.

Custom Fields

This tab manages three things. Each can apply to the whole account, a folder or a list, and each depends on your plan.

- **Custom Fields:** extra information to record for each bill. The types are Text Field (Max 255 Chars), Large Text Box, Date, Dropdown, Checkboxes and Hyperlink. Click **Show on Tracking List** to add the field as a column.
- **Custom Positions:** replace Support, Oppose, Neutral and Concerns with your own labels.
- **Custom Priorities:** replace High, Medium, Low and Monitoring with your own labels.

Before you add your first custom position or priority: doing so clears the existing position or priority values on bills in that scope for the current session. You are asked to confirm first.

Autopilot

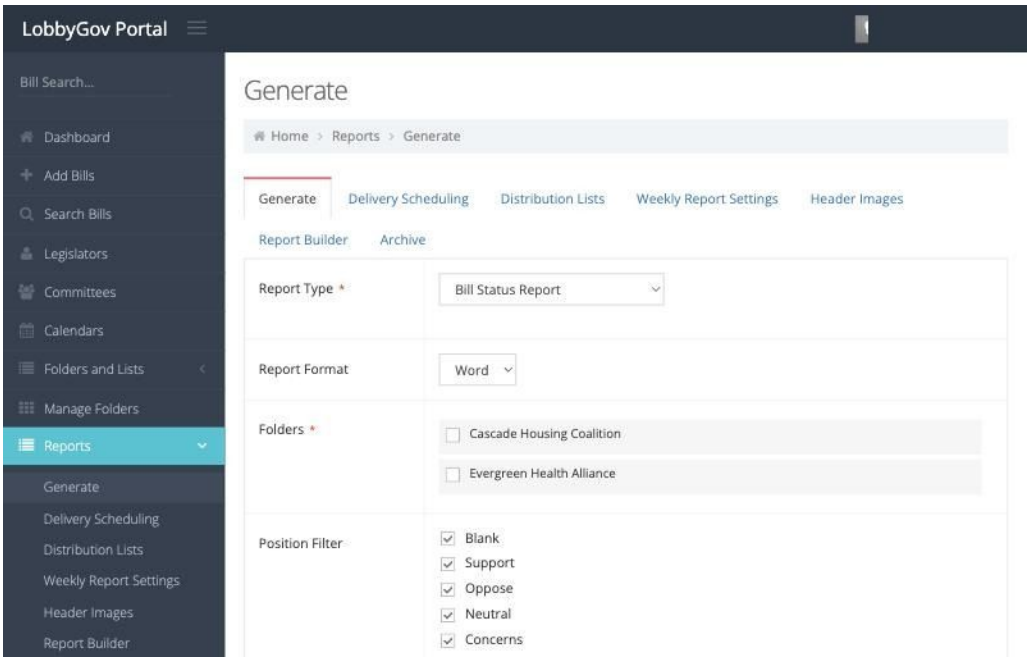
Super users can switch on account-wide automation, then click **Save**:

- Automatically add companion bills to tracking lists when they're missing.
- Automatically keep bill comments updated.
- Automatically keep bill short descriptions updated.

Reports

Generate a report

The **Reports** menu produces Word, Excel, HTML and PDF reports from your tracking lists. To generate reports, regular users need the Generate Reports permission.



Generate a report

1. Go to **Reports > Generate**.
2. Choose a **Report Type**. The options for that type appear below.
3. Choose a **Report Format**. Each type offers some of Word, Excel, Html and PDF.
4. Tick the **Folders**, and the lists within them, that the report should cover.
5. Set the filters and sorting you want. See the list below.
6. Choose how to receive it: download it straight away, or have it emailed to you, to a distribution list, or to another address.
7. Click **Generate Report(s)**.

Standard report types

- Bill Status Report
- Bill Status Report w/ Upcoming Events
- Detail Report
- Detail Report w/ Upcoming Events
- Full Report w/ Upcoming Events, Bill Status, and Details
- Global Bill Status Report

- Global Upcoming Events Report
- Legislature Roster
- Upcoming Events Report
- Weekly Report

Reports your account built in Report Builder appear under **Custom Reports** in the same list.

Filters and sorting

Depending on the report type, you can set:

- **Position Filter** and **Priority Filter:** untick the values to leave out.
- **Sort Bills By:** Category, Priority, Position, Bill Number, Priority with Dead Bills Last, or Priority with Inactive Bills Last.
- **Enacted Filter:** all bills, only enacted bills, or exclude enacted bills.
- **Dead/Alive Filter**, **Active/Inactive Filter** and **Biennium Filter**.

Save your settings

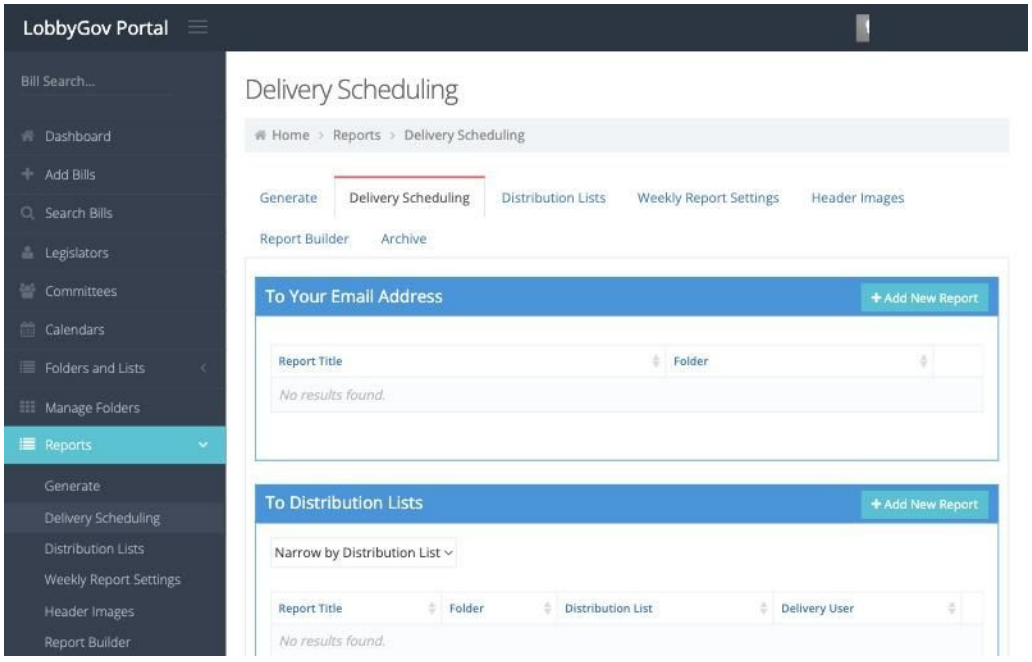
If you run the same report often, click **Save Selections for Future Use** and give the settings a name. Next time, pick them from **Select Saved Report Settings**.

Find a report you already generated

Reports > Archive lists your generated reports with their type, format, date and status (**Pending** or **Completed**). Click **Download** to get a completed report again, or **Delete** to remove it.

Schedule reports and manage distribution lists

LobbyGov can email a report automatically on the days you choose, to you, to a client mailing list, or to one other person.



Schedule a report

1. Go to **Reports > Delivery Scheduling**.
2. Click **+ Add New Report** in the panel you want: **To Your Email Address**, **To Distribution Lists** or **To Another Recipient**.
3. For a distribution list, choose the list. For another recipient, enter the **Recipient Name** and **Recipient Email**.
4. Choose the **Report Type** and its options. These are the same as on the Generate tab.
5. Tick each **Delivery Day** and choose a **Delivery Time**.
6. Save.

The delivery times are:

- Early Morning (5–7am)
- Morning (7–10am)
- Midday (10am–2pm)
- Afternoon (2–5pm)
- Evening (5–8pm)
- Late Evening (8–11pm)

Each schedule can be switched **Active** or **Inactive**, edited or deleted. The distribution list and other recipient panels need the Manage Report Scheduling permission.

Create a distribution list

A distribution list is a mailing list for one folder, such as a client's staff. You need the Manage Distribution Lists permission.

1. Go to **Reports > Distribution Lists**.
2. Choose the folder in **Select Folder**, then click **+ Add New**.
3. Fill in **Description**, **From Name**, **From Email**, **Email Subject** and **Email Message**. All are required.
4. Save, then click **Members** and use **+ Add** to enter each person's **Member Name** and **Member Email**.

Lists and members can be switched **Active** or **Inactive**, edited or deleted.

Change how the weekly report looks

Reports > Weekly Report Settings sets the weekly report's title, subtitle, header image, and which sections and bills it includes. You can set defaults, or different settings for one folder. Upload header images under **Reports > Header Images** (GIF, JPG, PNG or BMP, up to 1 MB).

Customize the weekly report and build custom reports

Three tabs under **Reports** control how your reports look: **Weekly Report Settings**, **Header Images** and **Report Builder**. The first two need the Generate Reports permission. Report Builder needs its own permission and a plan that includes it.

Weekly Report Settings

These settings shape the Weekly Report. Use the dropdown at the top to edit the **Default Settings**, or choose a folder to give it its own settings.

- **Report Settings:** the **Report Title** and **Subtitle**, a **Header Image** (**Select Image** or **Remove Image**), its justification, and whether the date and folder name appear in the header.
- **Filters:** hide dead bills, hide inactive bills, show only bills active in the current year of the biennium, or show only enacted bills.
- **Sections:** Generic Report Comments, Upcoming Events, Bill Tracking Overview and Detailed Bill Summary. Each section has its own heading, options and **Save** button.

Click **Save** in a section, or **Save All** at the top right.

Header Images

Header images are logos or banners that appear at the top of a report.

1. Go to **Reports > Header Images** and click **+ Add New**.
2. Choose the folder the image is for. Super users can choose all folders.
3. Enter a **Short Description**.
4. Select and upload the image. GIF, JPG, PNG and BMP files up to 1 MB are accepted.

Click **Edit** to resize, crop or replace an image. **Remove From Reports** stops using an image without deleting it. **Delete** removes it.

Report Builder

Report Builder creates your own report types. They appear under **Custom Reports** in the Report Type list on the Generate tab.

1. Go to **Reports > Report Builder** and click **+ Add New** under **Your Reports**.
2. Enter a **Short Description**.
3. Choose whether to start from an existing report type or build a report from scratch.
4. Choose a **Report Style**: **Spreadsheet** or **Document**.
5. Choose a **Scope**: where the report is available.
6. Optionally let other people on the account generate the report.
7. Save, then click **Edit** on the report to set its contents.

Each report can be switched **Active** or inactive, edited or deleted.

Text Blocks, on the same tab, are reusable pieces of formatted text, such as an introduction or disclaimer, that you can include in custom reports.

Subusers and Sharing

Create subusers

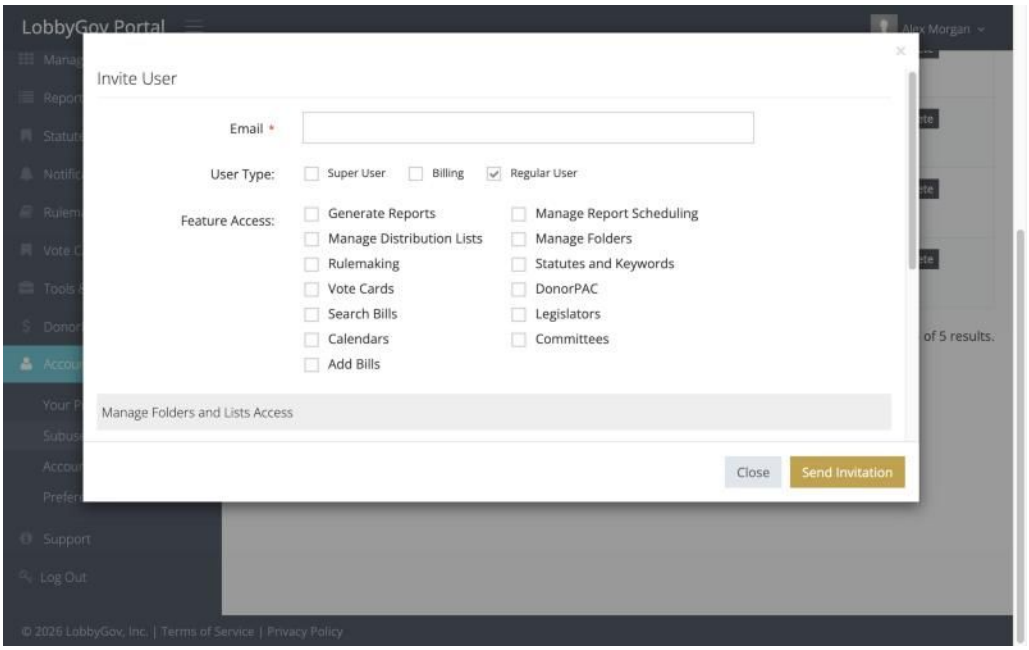
Depending on your plan, you can give other people their own login to your LobbyGov account. These people are called subusers. A subuser signs in with their own username and password, which keeps your login private and lets them set their own preferences.

Account owners typically create subusers when:

- An assistant or coordinator needs full Super User access to the account.
- A billing person only needs the billing and payment pages.
- A client should see only certain bill tracking information.
- A policy analyst or other staff member tracks bills in their own subject area.

Create a subuser

1. Go to **Account Settings > Subusers & Sharing**. Only super users can open this page.
2. Click **+ Invite New User** and enter the person's email address.
3. Choose the user type:
   - **Super User:** full access to your account.
   - **Billing:** access to the account's billing information.
   - **Regular User:** access to the features, folders and tracking lists you choose.
4. For a Regular User, tick the features under **Feature Access**. Most subusers need Generate Reports, Manage Report Scheduling, Manage Distribution Lists, and Statutes and Keywords.
5. Under **Manage Folders and Lists Access**, tick **Full Access** next to each folder the person should work in, or **View** if they should see it without making changes.
6. Click **Send Invitation**.



LobbyGov emails the person an invitation to create their own username and password. The link in it works for 7 days.

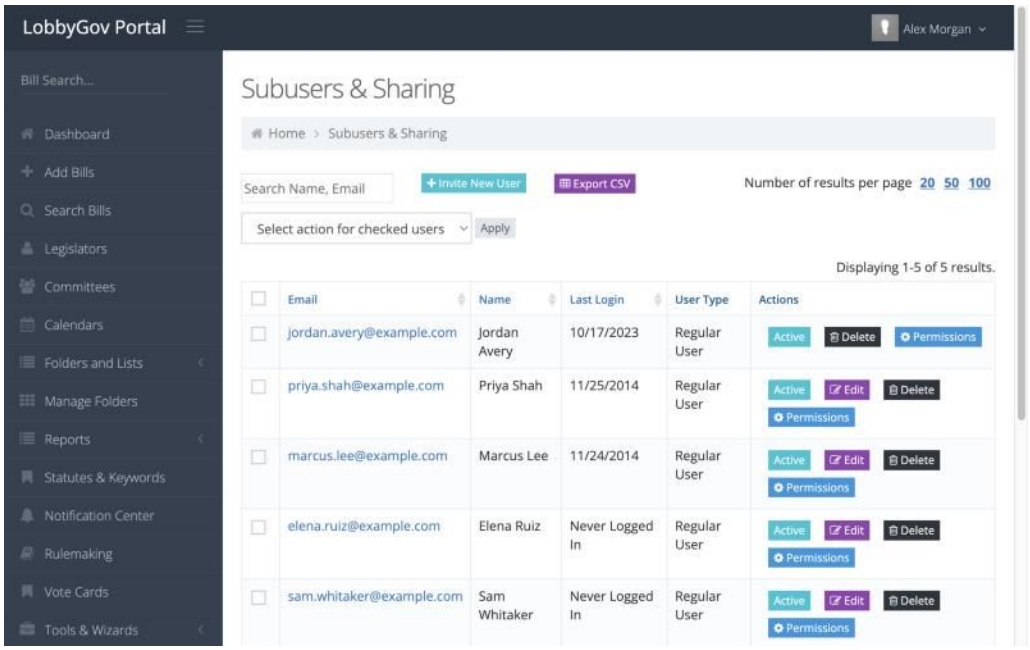
Change or remove a subuser

Come back to **Subusers & Sharing** at any time. Click **Permissions** on a person's row to change what they can do, **Active** to switch their access off without removing them, or **Delete** to remove their access.

Questions? Email support@lobbygov.com.

Invite users and set their permissions

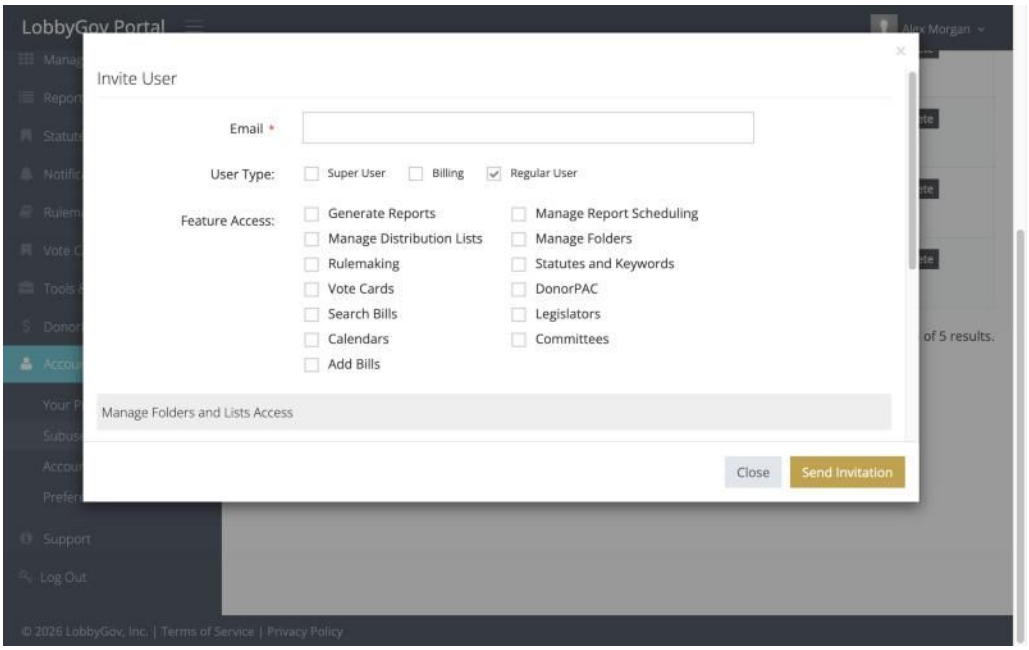
Super users add people to the account and decide what each person can see and do. This is done on **Account Settings > Subusers & Sharing**, which only super users can open.



The list shows each person's email, name, last login and user type. People who haven't accepted their invitation yet show as pending. Your plan sets how many users the account can have, and pending invitations count toward the limit.

Invite a user

1. Click **+ Invite New User**.
2. Enter the person's **Email**.
3. Choose a **User Type**:
   - **Super User:** can do everything, including managing users.
   - **Billing:** can see billing information, invoices and payments.
   - **Regular User:** can use the features and folders you choose.
4. For a Regular User, tick each item under **Feature Access** the person should have.
5. Under **Manage Folders and Lists Access**, choose **Full Access**, **View** or **Add/Edit/Delete** for each folder or list.
6. Click **Send Invitation**.



The person gets an email titled "LobbyGov Invitation from …". The link works for 7 days. If it expires, click **Resend Invite** on their row.

Feature Access options

- Generate Reports, Manage Report Scheduling, Manage Distribution Lists
- Manage Folders
- Rulemaking, Statutes and Keywords, Vote Cards
- DonorPAC, if your plan includes it
- Search Bills, Legislators, Calendars, Committees, Add Bills

A menu item is hidden from anyone who doesn't have its permission.

Change someone's permissions

Click **Permissions** on the person's row, change the user type, feature access or folder access, and save.

To give several people the same access, tick them, choose **Copy regular user permissions** from **Select action for checked users**, pick the person to copy from, and click **Apply**.

Turn off or remove access

- **Active:** click it to make the person inactive. They can't sign in to your account, and you can switch them back on later.
- **Delete:** removes the person's access to your account.
- **Edit:** change the person's name, email or other details.

Use **Export CSV** to download the user list.

Vote Cards

Count votes with a vote card

A vote card records where each legislator stands on a bill or issue and keeps a running count. Regular users need the Vote Cards permission.

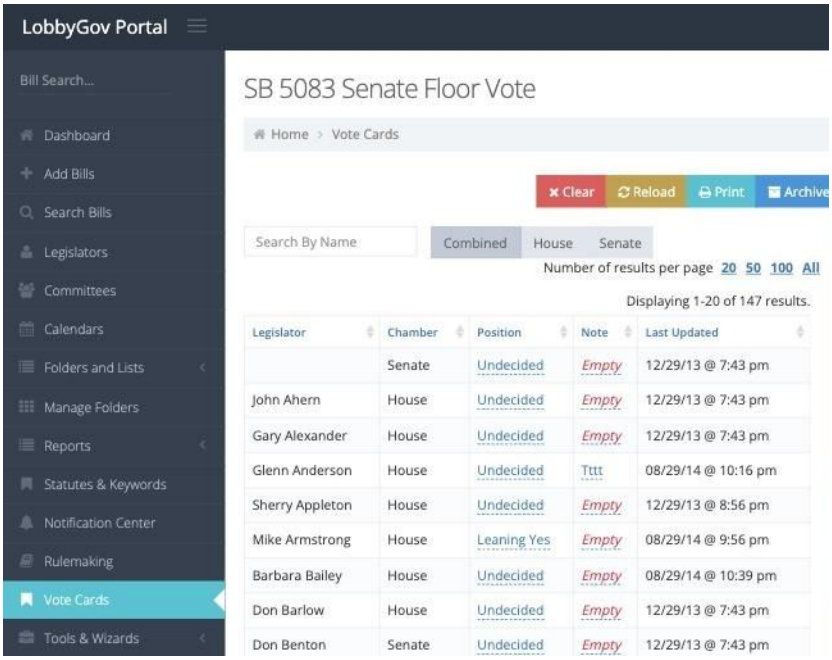
Create a vote card

1. Click **Vote Cards** in the menu, then **+ New Card**.
2. Enter a **Title**. **Description** is optional.
3. Choose the **Chamber**: both chambers combined, or one chamber.
4. Optionally tick colleagues under **Share with**.
5. Save.

The Vote Cards page shows each card with its totals for Yes, No, Leaning Yes, Leaning No and Undecided. Use the **Combined**, **Senate** and **House** tabs on a card to see the count for each chamber.

Record positions

1. Click **Detail** on the card.
2. Find the legislator. Use **Search By Name** or the chamber buttons to narrow the list.
3. Click the value in the **Position** column and choose **Yes**, **No**, **Leaning Yes**, **Leaning No** or **Undecided**.
4. Click the **Note** column to add a note, such as who you spoke with.



The totals update as you go.

Card buttons

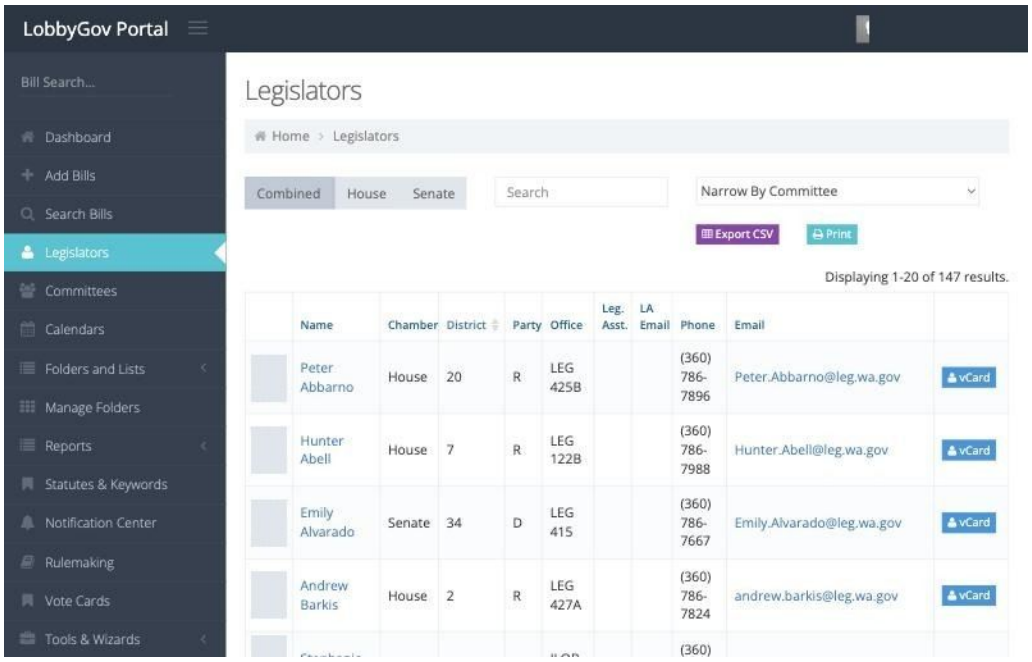
- **Clear:** erases every position and note on the card.
- **Reload:** refreshes the card.
- **Print**
- **Archive:** hides the card without deleting it.
- **Rename**
- **Delete**

To share a card after creating it, tick people in the **Sharing** panel on the card's detail page and click **Save**. Only the card's owner can share, rename or archive it.

Legislators

Find legislators

The **Legislators** page is a directory of the current legislature, with each member's chamber, district, party, office, phone and email. Regular users need the Legislators permission.



Find a legislator

- Click **Combined**, **House** or **Senate** to choose the chamber.
- Type a name in **Search**.
- Choose a committee in **Narrow By Committee** to list its members.

See a legislator's details

Click the legislator's name. Their page shows their offices, their committees and the bills they sponsor.

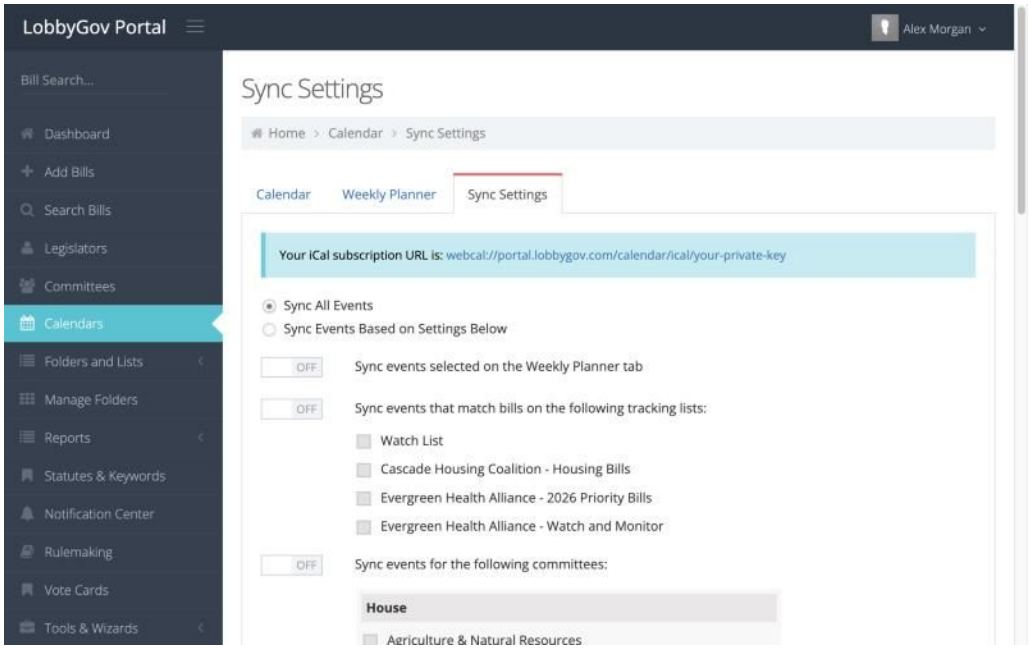
Take the information with you

- **vCard:** downloads one legislator's contact details to add to your address book.
- **Export CSV:** downloads the list as a spreadsheet.
- **Print**

Committees and Calendars

Subscribe to your LobbyGov Legacy calendar feed

LobbyGov gives you a personal calendar feed that you can subscribe to on your phone, tablet or computer. Your calendar app checks the feed regularly, so hearings and other committee events appear and update on their own.



Step 1: Choose what the feed includes

1. Sign in at https://portal.lobbygov.com and click **Calendars** in the menu, then the **Sync Settings** tab.
2. Choose **Sync Events Based on Settings Below**. **Sync All Events** is not recommended, because it includes every legislative committee event.
3. Switch on the options you want:
   - Events you marked as attending on the Weekly Planner tab.
   - Events that match bills on the tracking lists you tick, including your Watch List.
   - Events for the committees you tick. Most people choose the handful of committees they regularly attend.
4. Click **Save Changes** near the bottom of the page.

Step 2: Subscribe

- **On the device you're using now:** click the link after **Your iCal subscription URL is**. Your calendar app asks whether to subscribe.

- **On another device:** right-click the link (or Control-click on a Mac) and choose Copy. Email the link to yourself, open the email on your phone or tablet, and tap the link to add the calendar.

The feed works with Apple Calendar, Outlook and other apps that accept calendar subscriptions. Google Calendar is not recommended because it refreshes subscribed calendars slowly; see Google Calendar is not updating my LobbyGov Legacy calendar feed.

Keep the link private. Anyone who has it can see your feed.

Use the Calendar and Weekly Planner

The **Calendars** page shows hearings and other committee events. It has three tabs: **Calendar**, **Weekly Planner** and **Sync Settings**. Regular users need the Calendars permission.

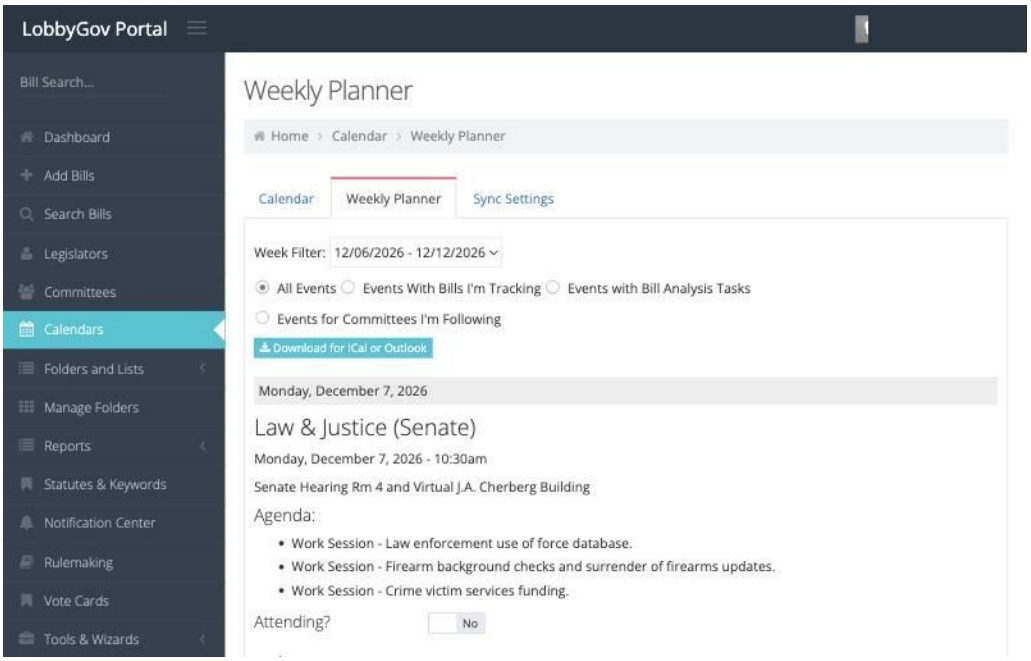
Calendar

The Calendar tab opens on the current week. Use **today**, **month**, **week** and **day** to change the view, and click an event to see its details.

Times on this tab are shown in Pacific time, whatever time zone is set in your profile.

Weekly Planner

The Weekly Planner lists a week's events with their agendas, so you can decide which to attend.

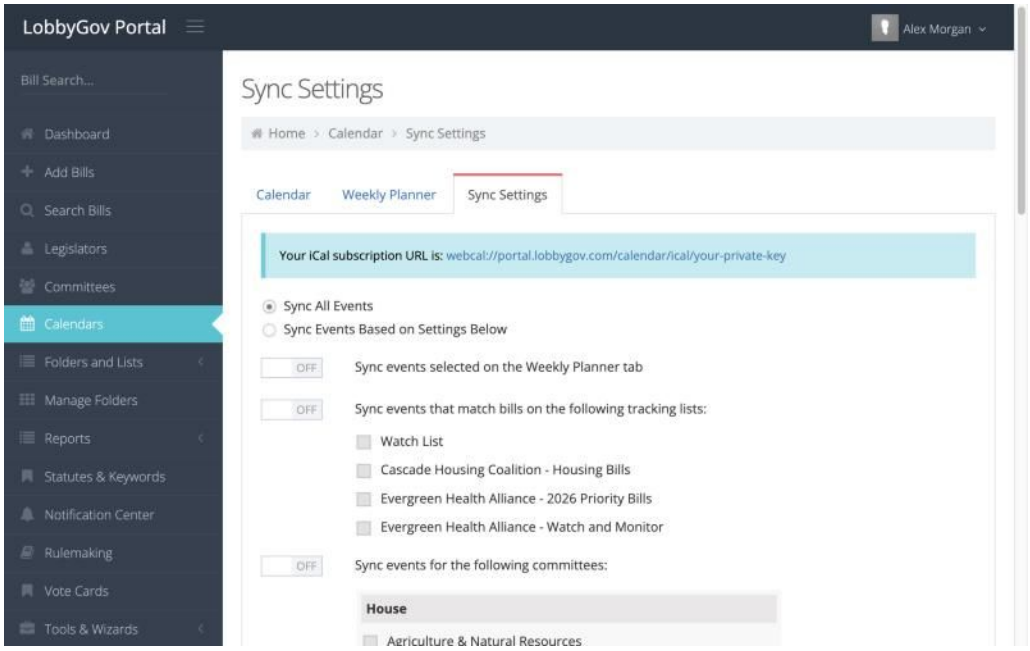


1. Choose the week in **Week Filter**.
2. Choose which events to list:
   - **All Events**
   - **Events With Bills I'm Tracking**
   - **Events for Committees I'm Following**

3. For each event you plan to attend, switch **Attending?** to **Yes**.
4. Click **Download for iCal or Outlook**. The file contains that week's events marked as attending. Open it to add them to your calendar app.

Sync Settings

Sync Settings gives you a personal subscription link that your calendar app checks regularly, so new events appear on their own.



1. Choose **Sync All Events**, or **Sync Events Based on Settings Below** and switch on any of:
   - Events selected on the Weekly Planner tab.
   - Events that match bills on the tracking lists you tick, including your Watch List.
   - Events for the committees you tick.
2. Click **Save Changes**.
3. Copy the **iCal subscription URL** at the top of the tab and add it as a subscribed calendar in Apple Calendar, Outlook or Google Calendar.

Keep the link private. Anyone who has it can see your feed.

Single events

Wherever you see an **iCS** button, such as on the Dashboard's Upcoming Events panel and the Committees page, it downloads that one event as a calendar file.

Google Calendar is not updating my LobbyGov Legacy calendar feed

From time to time we receive support requests from customers who are experiencing problems with Google Calendar not updating the "LobbyGov Events" subscription calendar feed.

Unfortunately, Google Calendar does not allow users to force a refresh of the calendar feed nor does it let users set a refresh interval. Because of this limitation, LobbyGov does not recommend using Google Calendar to subscribe to calendar feeds. During legislative sessions, the committee schedules change much more frequently than Google updates, limiting the value of the calendar feed subscription when doing so through Google.

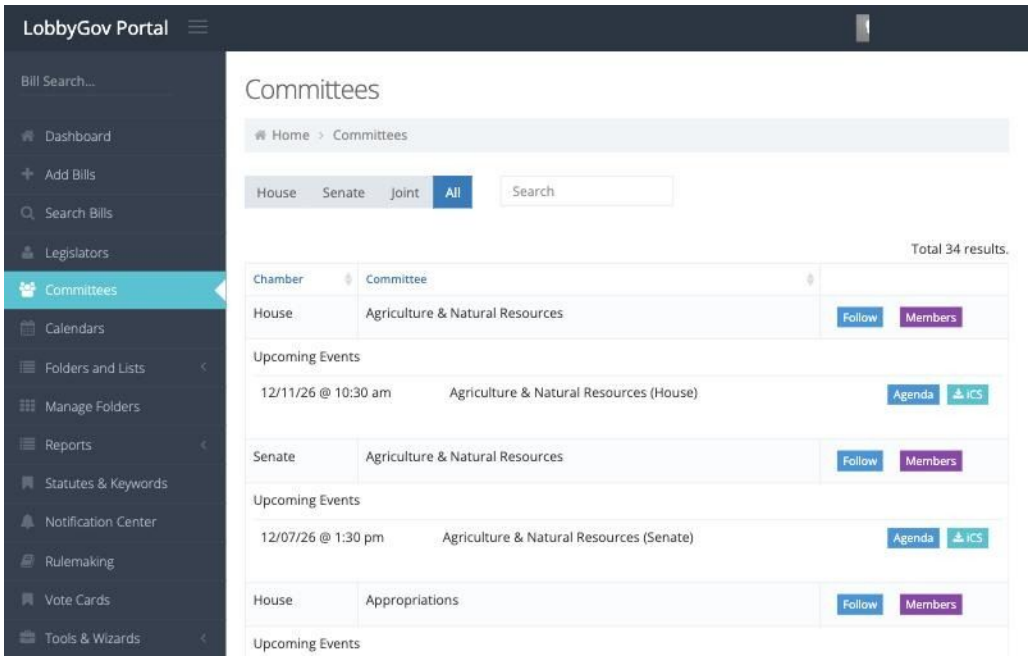
Google also does not publicly report a refresh rate. Some of our customers have reported updates very quickly while others report days or even a week going by before updates occur.

There are other ways to subscribe to the LobbyGov Events subscription calendar feed, however. You can subscribe to the feed on your phone and tablet directly, in Outlook or with iCal on a Mac. These options usually work better, and you can specify the refresh interval. This puts you in more control.

If you have specific questions or concerns about using Google Calendar, please contact us at support@lobbygov.com.

Follow committees and their events

The **Committees** page lists each committee with its upcoming events. Regular users need the Committees permission.



Find a committee

Click **House**, **Senate**, **Joint** or **All**, or type in **Search**.

See who is on a committee

Click **Members** on the committee's row.

See an event's agenda

Each committee's upcoming events are listed under it with the date and time. Click **Agenda** to see what is scheduled, or **iCS** to download the event to your calendar app.

Follow a committee

Click **Follow** on a committee's row. Following a committee adds an **Events for Committees I'm Following** option to the Weekly Planner on the Calendars page, so you can see just those events.

Using the Outlook Sync Tool (no longer supported)

LobbyGov no longer supports the Outlook Sync Tool. We've replaced it with a modern subscription calendar feed function. This information is available for those still opting to use the Sync Tool.

This tool allows you to keep legislator contacts and committee calendar events synced with Microsoft Outlook without the hassle of entering them all in by hand. Follow the steps below to download and install the tool.

The sync tool will sync calendar events based on your preferences on the LobbyGov Portal's Calendars page.

Step 1.	**Make sure your computer meets the necessary system requirements.** Windows 8 or newer is recommended to operate the sync tool. Microsoft Outlook 2013 or newer is also recommended. The sync tool may work on previous versions of Windows or Outlook, but we do not guarantee it or provide technical support.
Step 2.	**Uninstall any older versions of the LobbyGov Sync Tool. To do this, go to your computer's Control Panel, find the Add/Remove Programs option and remove the LobbyGov Sync Tool from the list.**
Step 3.	**Download the Installer** Click here to download. When prompted, save the installer to your desktop.
Step 4.	**Make sure you close Microsoft Outlook before installing.** After the download is complete, double-click the installer that is saved to your desktop. Click "run" or "yes" to any security warnings that may appear. When the

	program launches, follow the on-screen instructions. This will begin the installation. Continue through the installation prompts.
Step 5.	**When the installation is complete, launch Microsoft Outlook.** You should see a small LobbyGov icon on your computer's system tray near the clock. If it is not there, it might be hidden, so click the arrow to show all icons. Right-click the icon and choose "LobbyGov Options". Enter your LobbyGov username and password and click "Test Credentials". When that is successful, check the boxes to synchronize contacts and calendars. Click the "..." buttons for each to select the appropriate contacts and calendar folders. Click the "Advanced >>" button to specify additional preferences.
Step 6.	**The sync tool is now ready to go.** The preferences for which calendar events to sync are managed on the LobbyGov Account Control Panel website. Log in with your username and password and click "Committee Calendars" under the Account Menu. Then click the "Outlook Sync Settings" tab to set your preferences.

Still have questions? Send LobbyGov Support an email.

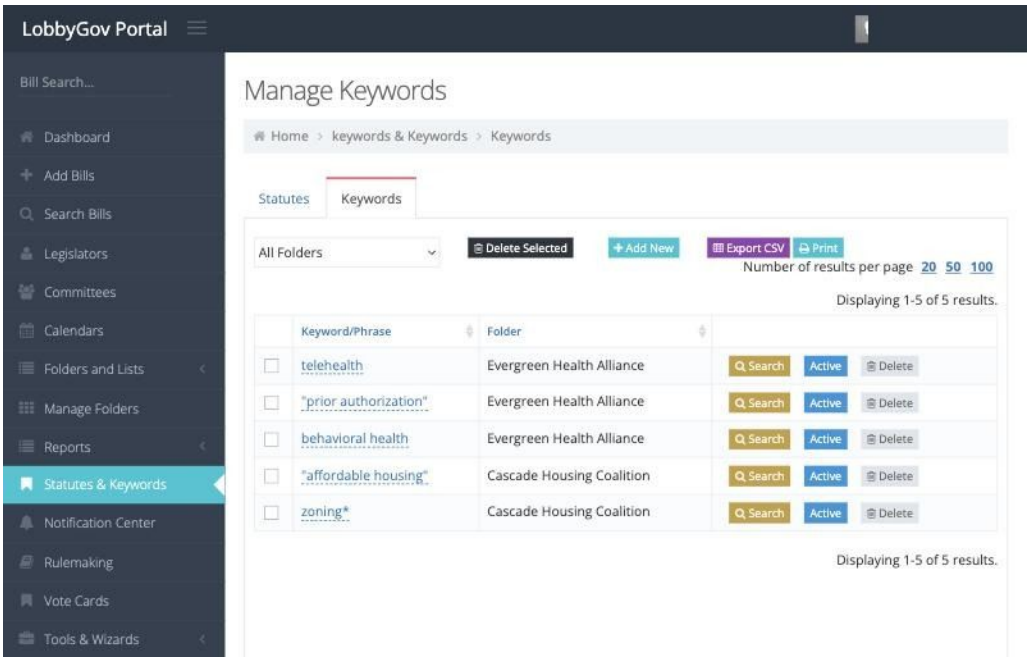
Statute and Keyword Tracking

Track keywords and statutes

Statutes & Keywords watches new bill text for the words and statute citations you care about. Regular users need the Statutes and Keywords permission. In states without statute tracking, the menu item is called **Keyword Tracking**.

Track a keyword

1. Click **Statutes & Keywords** in the menu, then the **Keywords** tab.
2. Click **+ Add New**.
3. Enter a **Keyword/Phrase**. Put quotes around an exact phrase, such as `"prior authorization"`, and use an asterisk as a wildcard, such as `zoning*`.
4. Tick the folders the keyword applies to and save.



On each row:

- **Search** runs a bill search for the keyword now.
- **Active** turns matching off and on without deleting the keyword.
- **Delete** removes it.

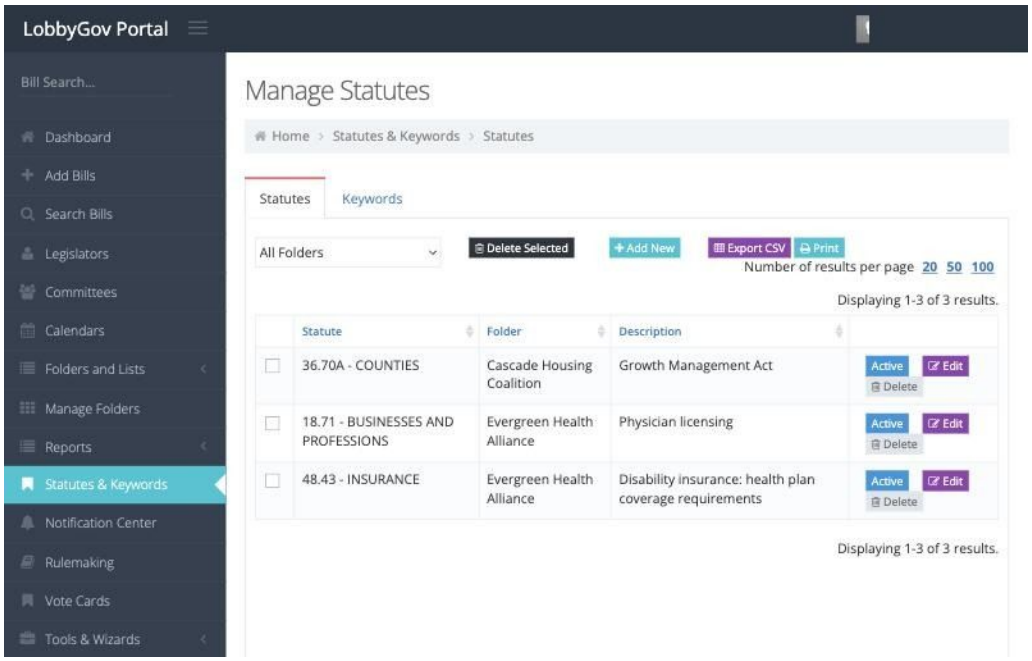
Click a keyword to edit it.

Track a statute

Statute tracking is available in states that support it.

1. On the **Statutes** tab, click **+ Add New**.
2. Choose the title, and optionally enter a **Chapter** and **Section**.

3. Tick the folders it applies to and add a **Description**.



Use **Export CSV** or **Print** to take the list out of LobbyGov.

Get an email when something matches

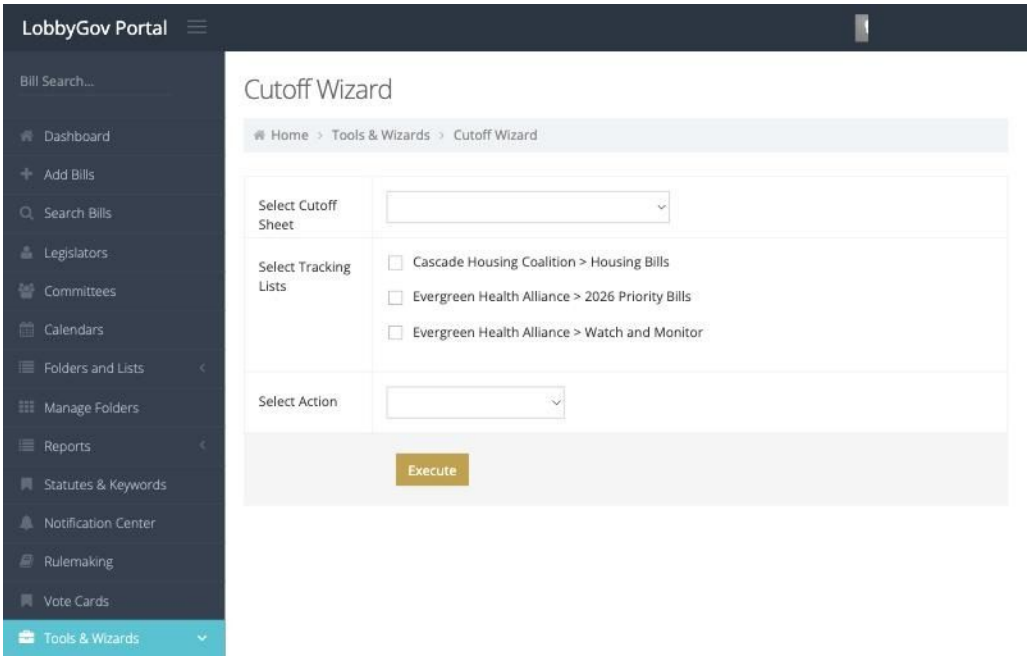
Matches are emailed only if you switch them on. Go to **Notification Center** and turn on **Keywords** and **Statutes** for each folder you want to hear about, then click **Save**.

Tools and Wizards

Update your lists after a cutoff with the Cutoff Wizard

There are a series of "cutoffs" during each legislative session. Bills, except those deemed necessary to implement the budget, must reach a certain point in the legislative process before each cutoff date to stay alive. For the cutoff rules and the latest cutoff calendar, refer to the Washington Legislature's website.

Within a few days of each cutoff, the Legislature's Legislative Information Center releases a list of bills that made the cutoff, and LobbyGov imports it into the **Cutoff Wizard**. The wizard then updates the bills on your tracking lists that failed to make the cutoff, marking them dead, inactive, or another value you choose.



Run the Cutoff Wizard

1. Go to **Tools & Wizards > Cutoff Wizard**.
2. Choose the cutoff under **Select Cutoff Sheet**.
3. Under **Select Tracking Lists**, tick each list you want to update.
4. Under **Select Action**, choose what to do with bills that failed to make the cutoff. Most people mark them as dead.
5. Click **Execute**.

Check the results

The Cutoff Wizard gets its data from the Legislature. Sometimes a bill on the Legislature's list is, in your experience, still alive. In that case, open the tracking list, click **Edit Bill** on the bill, and untick

Dead (or undo whichever value was applied). Every bill's dead and active settings can be edited by hand at any time.

Bring bills back with the It's Alive! Tool

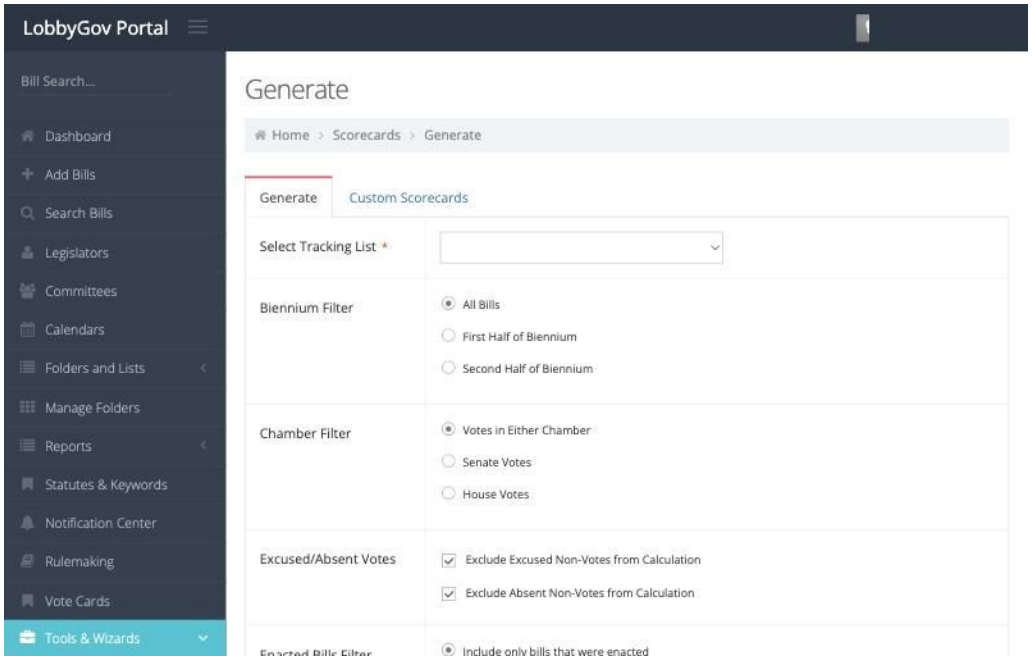
The **It's Alive! Tool** complements the Cutoff Wizard. Once bills start to move again after a cutoff, it finds any old bill on your lists that has started moving and updates it for you.

1. Go to **Tools & Wizards > It's Alive! Tool**.
2. Under **Select Tracking Lists**, tick the lists to check.
3. Choose what to do with revived bills under **Select Action**.
4. Click **Execute**.

Both tools are available in states where LobbyGov offers them.

Create a scorecard report

The **Scorecards** tool generates a spreadsheet with a percentage score for each legislator. It helps you see which legislators are most aligned with your client's or organization's positions. Find it under **Tools & Wizards > Scorecards**.



Create a standard scorecard

A standard scorecard includes every bill on the tracking list you choose that passed the legislature and has a position of Support or Oppose. The position is how LobbyGov calculates the score. If a bill you expect is missing from the report, check that its position is set on the tracking list.

1. On the **Generate** tab, choose the list under **Select Tracking List**.
2. Under **Biennium Filter**, choose **All Bills**, **First Half of Biennium** or **Second Half of Biennium**. Bills from both years are included by default.
3. Under **Chamber Filter**, choose votes in either chamber, Senate votes or House votes.

4. Under **Excused/Absent Votes**, choose whether excused and absent non-votes are left out of the calculation. By default they don't count against a legislator's score.
5. Choose the delivery method: download it immediately or have it emailed.
6. Click **Generate**.

The last final passage vote on each bill is included automatically. To use different votes, create a custom scorecard.

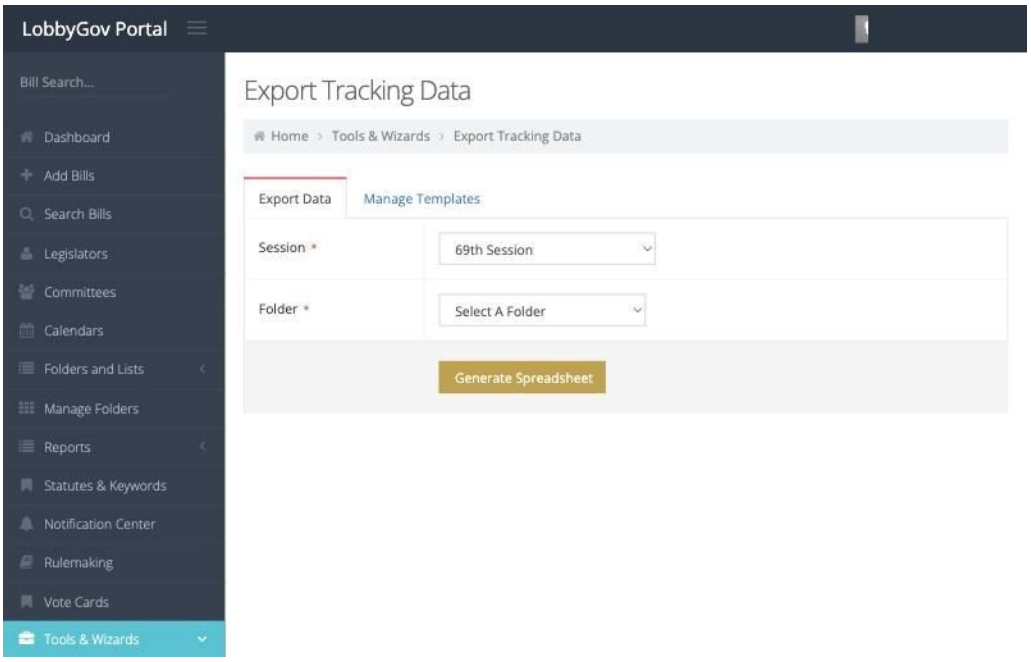
Create a custom scorecard

A custom scorecard lets you choose which bills and floor votes count, and change the label and point value of each vote. Before you start, make sure every bill you want is on your tracking list.

1. Click the **Custom Scorecards** tab, then **+ Add New**.
2. Enter a short description, choose the tracking list and click **Save**.
3. Click **Manage Bills** on the new scorecard. A window lists every bill on the tracking list that has one or more votes, whatever the bill's outcome.
4. Click the **+** next to each bill you want. Its recorded floor votes appear.
5. Tick each vote to include. You can enter your own label and change the point value. Click **Save** as you go.
6. When you've chosen all the votes, click **Save** once more, then **Close**.
7. Go back to the **Generate** tab and choose the tracking list. A **Select Card** option appears with "Default" selected. Change it to your custom scorecard.
8. Set the excused and absent vote options and the delivery method, then click **Generate**.

Export tracking data to Excel

Export Data downloads the bills on your tracking lists as a spreadsheet, with the columns you choose. You set the columns up once as a template, then reuse it.



Step 1: Create a template

1. Go to **Tools & Wizards > Export Data** and click the **Manage Templates** tab.
2. Click **+ Add New** and enter a **Short Description**.
3. Choose the folder and list the template applies to, or leave it available for all.
4. Choose whether to **Include Header Row**.
5. Click **+ Add Column** for each column you want. Give each a **Column Label** and choose the field it shows.
6. Save.

Step 2: Export

1. On the **Export Data** tab, choose the **Session** and the **Folder**.
2. Tick the lists to include and choose your **Template**.
3. Click **Generate Spreadsheet**. A file named `Bill-Tracking-Data.xls` downloads.

If the export doesn't start

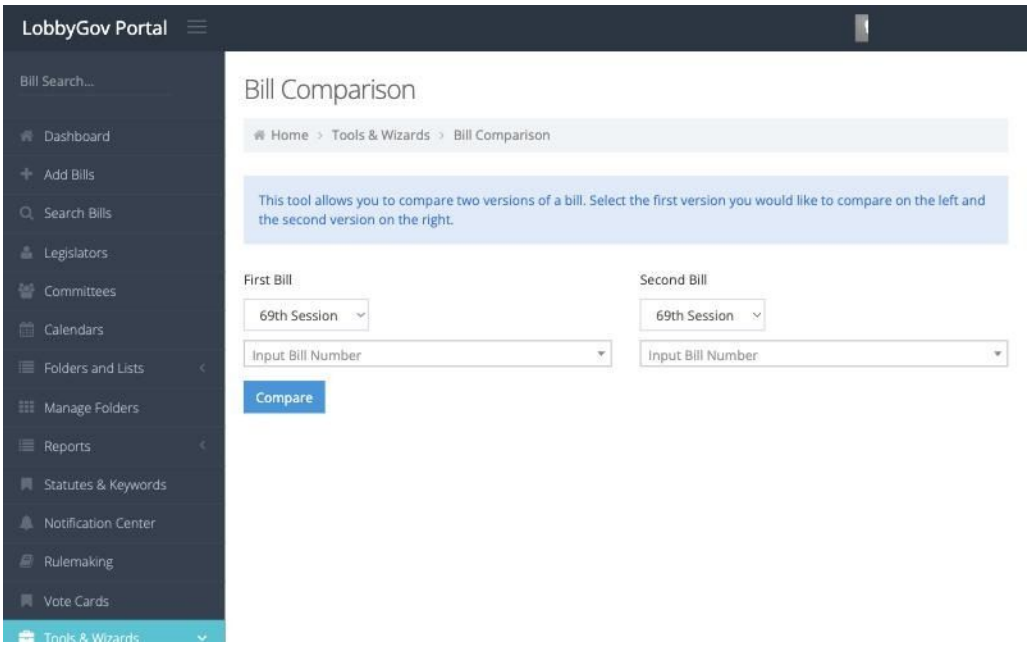
- **"Please create a template on the Manage Templates page before exporting."** Do step 1 first.
- **"You have to check at least a list!"** Tick one or more lists.
- **"No data available for exporting for this State"** The lists have no bills for the session you chose.

Other ways to export

- On a tracking list, click **Export CSV** or **Export XLS**.
- On the Dashboard, click **Export** on the Bill Tracking Overview or Upcoming Events panel.
- On the Legislators, Keywords and Subusers & Sharing pages, click **Export CSV**.

Compare two versions of a bill

Bill Comparison shows two bill documents side by side so you can see what changed between versions, or how two bills differ.



1. Go to **Tools & Wizards > Bill Comparison**.
2. Under **First Bill**, choose the session and type the bill number. Pick the version you want from the list that appears.
3. Do the same under **Second Bill**.
4. Click **Compare**.

Messages you may see

- **"The second bill is the same as the first bill."** Choose a different version or bill on one side.
- **"No document found for this bill."** The legislature hasn't published text for that bill or version yet.

Rulemaking

Track agency rulemaking

Rulemaking lets you search state agency rulemaking filings and get notified about the agencies, code sections and phrases you follow. It is available in states where LobbyGov tracks rulemaking, and regular users need the Rulemaking permission.

Click **Rulemaking** in the menu. The page has four tabs.

Search Filings

1. Choose a register, or leave **All Registers**.
2. Choose an agency, or leave **All Agencies**.
3. Type your search words and click **Search**.

Click **Start Over** to clear the search.

Agencies

Click **Add Agency to Follow** and choose the agency. For each agency you follow, **View Filings** lists its filings and **Stop Following** removes it.

Codes

Follow a part of the administrative code. Click **Add New** and enter the code. **View Filings** lists filings that affect it. Switch a code **Active** or **Inactive**, or **Delete** it.

Phrases

Follow a word or phrase in filings. Click **Add New**, enter the phrase and tick the folders it applies to. A phrase needs one folder or more.

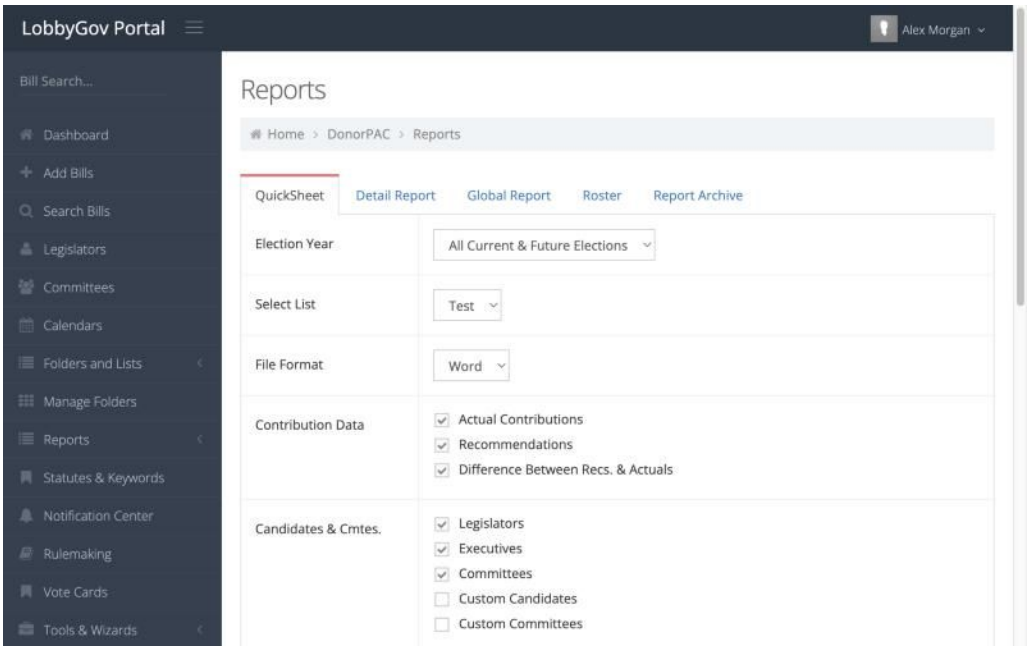
Get rulemaking emails

In the **Notification Center**, turn on **Rulemaking** for the folders you want, and turn on **New Rulemaking Register** to hear when a new register is published. Click **Save**.

DonorPAC

Generate DonorPAC reports

DonorPAC includes several reports on your recommendations and contributions. They work much like the bill tracking reports. Go to **DonorPAC > Reports** in the menu.



Generate a report

1. Click the tab for the report you want: **QuickSheet**, **Detail Report**, **Global Report** or **Roster**.
2. Choose the **Election Year**. The default, "All Current & Future Elections", usually covers this year's races and the next even-year election, so Senate candidates who aren't up until then are included.
3. For a QuickSheet or Detail Report, choose the contribution list under **Select List**.
4. Choose the **File Format**. Some reports come in Word and Excel, others in only one.
5. Under **Contribution Data** and **Candidates & Cmtes.**, tick what to include. Use the other filters to include or leave out candidates.
6. Choose the delivery method: download the report now, or send it to an email address you enter.
7. Click **Generate Report**. The report is usually ready within a few minutes.

The **Report Archive** tab lists reports you generated before, to download again or delete.

The report types

- **QuickSheet:** a Word or Excel report of contributions and recommendations, with candidate and campaign names, for one contribution list.

- **Detail Report:** a Word report of contributions and recommendations with candidate details (name, campaign name, address, and tax ID number if available) for one contribution list.
- **Global Report:** an Excel report of contributions or recommendations across all of your contribution lists.
- **Roster:** an Excel report of candidate names, addresses, contact information, tax ID numbers and other available details.

Track contributions with DonorPAC

DonorPAC helps a political action committee plan and record campaign contributions. You keep one or more **contribution lists**, record what you plan to give (**recommendations**) and what you gave (**actual contributions**), and run reports on the results.

DonorPAC appears in the menu if your plan includes it and you have the DonorPAC permission. Super users have it automatically.

The DonorPAC menu

- **Overview:** upcoming campaign events and your recent activity.
- **Campaigns:** the candidates and committees for your state, under **Legislature**, **Executive**, **Committees** and **Custom**.
- **Contribution Lists: Manage Lists**, plus an entry for each list.
- **Reports** and **Analytics**.

Create a contribution list

1. Go to **DonorPAC > Contribution Lists > Manage Lists** and click **Add New**.
2. Enter a **Name**. Optionally add the **Organization** and a contact name, phone and email.
3. Save.

Your plan limits how many lists you can create.

Record a recommendation or contribution

1. Open the list from the DonorPAC menu.
2. Choose a tab: **Legislature**, **Executive**, **Committees**, **Custom Candidates** or **Custom Committees**.
3. Find the candidate or committee. You can filter by election, by incumbent or challenger, by committee and by group.
4. Click **Add Rec** to record a planned amount, or **Add Contrib** to record a contribution you made.
5. Enter the **Election**, **Amount**, **Date** and any **Notes**. A recommendation also needs a **Short Description**. For a contribution, choose an **Associated Rec** to link it to a recommendation.

The list shows each candidate's recommended (**Rec'd $**) and actual (**Act $**) amounts for the primary and general elections.

Groups

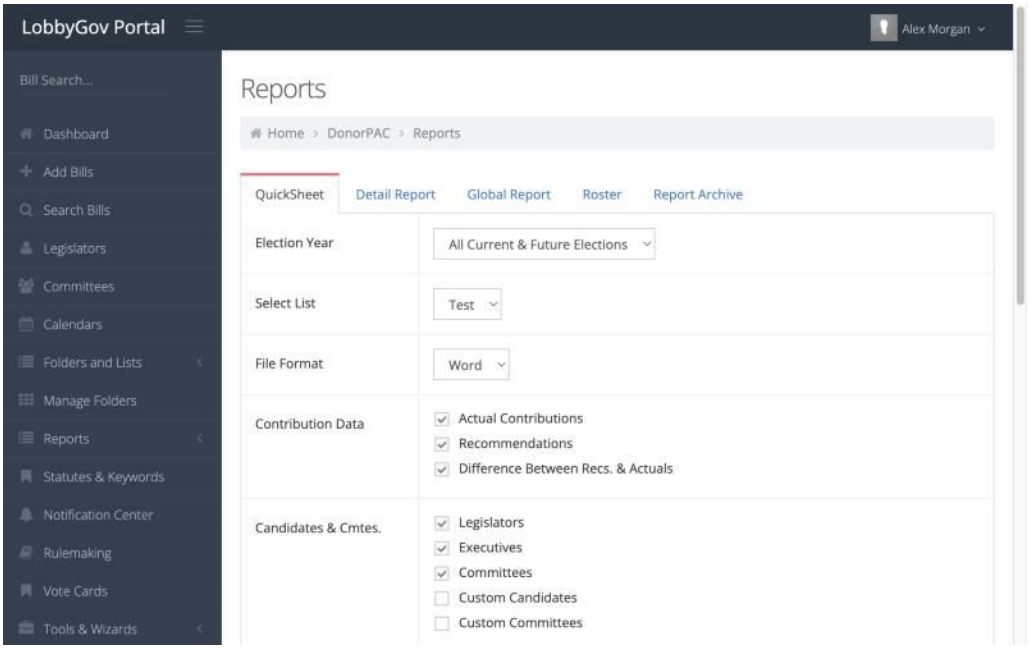
Groups let you bundle candidates, for example "Health Committee members". On a list's **Groups** tab, click **Add New** and give the group a name and election. Then click **Manage Groups** on a candidate's row to add them.

Custom candidates and committees

If a candidate or committee isn't in LobbyGov's data yet, add it on the **Custom Candidates** or **Custom Committees** tab. When the official record appears later, use **Merge** to move your recommendations, contributions and notes onto it.

Reports and analytics

DonorPAC > Reports has five tabs: **QuickSheet**, **Detail Report**, **Global Report**, **Roster** and **Report Archive**.



1. Choose the **Election Year**, the list and the **File Format**.
2. Under **Contribution Data**, tick actual contributions, recommendations, and the difference between them.
3. Under **Candidates & Cmtes.**, tick who to include.
4. Choose to download the report now or have it emailed, then click **Generate Report**.

DonorPAC > Analytics charts your totals, the party breakdown, winners and losers, and contributions over time, for the elections and lists you choose under **Data Filters**.

Who can see a list

The person who creates a list has full access to it. Super users set everyone else's access to each list (**Full Access**, **View** or **Add/Edit/Delete**) under **Account Settings > Subusers & Sharing > Permissions**.

DonorPAC candidate data updates

The LobbyGov DonorPAC campaign contribution tracking tool is a great way to track recommendations and actual contributions for your clients. We understand that updated candidate data is important to you. Unfortunately there isn't a good central data source we can capture candidate data from. This means that the near realtime legislative data updates that you're used to during session doesn't happen with candidate data. In fact, nearly all of the candidate data has to be retrieved and entered by hand.

Here's additional information about our update practices and some advice:

Candidate Data is Updated Regularly

Candidate data is updated once a month. If we're made aware of clerical errors or other missing data, we'll try to get that fixed as soon as possible without necessarily waiting for the next scheduled update.

Where We Get the Candidate Data

We retrieve candidate data from two sources: the party campaign committee websites and the Secretary of State's official filing roster. This means that before the filing deadline, our candidate data may be incomplete or not 100% correct as caucuses tend to be inconsistent in their updates. The filing roster serves as the authoritative source on the candidates actually running.

Candidate Data Before the Filing Deadline

The Washington Secretary of State certifies candidate filings on or around May 20 of each election year. Until our next regularly scheduled data update following certification, not all candidates will necessarily be in our database. Before the candidate filing list is finalized, we rely on the campaign committees for candidate names and data. This means in some cases a candidate you know is running will not be in our database because the respective campaign committee hasn't listed them.

We Don't Independently Verify Data

LobbyGov is a data aggregation service. This means that the candidate data we provide is only as good as the source we retrieve it from at the time we retrieve it. We're unable to make inquiries to individual candidates and campaigns to get data that isn't published (like tax ID numbers). We do our best to update addresses, campaign staff, emails, phone numbers, tax ID numbers, etc. but cannot guarantee the validity of this data. Some candidates and campaign committees are better than others at making data publicly available and keeping it up to date. If a candidate is not associated with a caucus or listed on a caucus website, our data will most likely be the bare minimum (name, email, mailing address, phone).

Last Minute Pre-Freeze Contributions

Candidates sometimes close their PO Box or change their mailing address once the campaign is over. If this happens, they may not update this information publicly until their official campaign kickoff for the next election or until the next session ends. If you're making last minute contributions outside of the normal election campaign cycle, please verify addresses with the campaign directly.

Let Us Know if Something Isn't Right

If you come across candidate information that you know isn't right or has changed, please let us know. There's often a disconnect between what lobbyists know and what the campaign data may reflect. Send all DonorPAC-related issues to support@lobbygov.com and we'll investigate.

Enterprise User Guides

Getting Started for Enterprise Account Administrators

Applies to: Enterprise accounts

This checklist takes a new Enterprise Admin from an empty account to the first completed bill analysis. Everything is under **Bill Analysis**, **Configuration** in the left menu.

1. Decide how your organization will work

Open **Settings**, **General Settings** and make three decisions first:

- **Organization Bill Analysis Mode**: a separate analysis per reviewer, one per department, or one for the whole organization.
- **Require Liaisons to Assign Bills to Reviewers** and **Require Liaisons to Approve Bill Analysis/Review**: how much the liaison controls.
- **Approver Mode**: whether you need approval levels above the liaison.

Also set **Department Name** if your organization uses another word, and the default due days.

2. Create your departments

Open **Departments** and add each one, with a contact and, if you like, an associated tracking list.

3. Write your questions

Open **Questions & Templates**. Add the questions reviewers should answer, put them in a group, and mark the usual ones as default. Build templates if different kinds of bills need different forms.

4. Add your people

Open **Liaisons/Reviewers**. Add each person, choose their user type and put them in their departments. Use **Import Users** for a long list.

5. Set what each role can do

On the role settings tab, choose what liaisons and reviewers may do and which pages they can see.

6. Turn on email

On **Communication Settings**, switch on **Email Alert System** and the alerts you want.

7. Run a test bill

1. Click **Add Bills**, enter a bill and tick a department and its questions.
2. Open **Awaiting Assignment** and assign it to a reviewer.
3. Use **Switch Users** to become that reviewer, complete the review, then switch back.
4. Open **Needs Approval** and approve it.

8. Add the extras when you are ready

- **Triggers** and **Position Sync** to keep tracking lists up to date.
- **Custom Fields** for your own data on each task.
- **Dashboard Manager** and **Custom Views** for tailored pages.
- **Hearings Manager** to assign committee hearings.
- Single sign-on.

Bill Analysis overview: roles, departments and stages

Applies to: Enterprise accounts

Bill Analysis is how an organization with several departments reviews legislation: bills are sent to the departments they affect, staff answer a set of questions and recommend a position, and a liaison approves the result.

The pieces

- **Task**: a bill, an amendment, a new bill version or a custom task that needs analysis.
- **Department**: a group inside your organization. Each task is assigned to one or more departments, and one can be the lead. Your account may use another word, such as Office.
- **Review**: a reviewer's answers to the questions or template, plus a recommended position and priority.

Roles

Role	What they do
Enterprise Admin	Sets up departments, users, questions and settings. Can see and manage every task.
Liaison	Assigns their department's bills to reviewers and approves the reviews.
Reviewer	Analyzes the bills assigned to them.
Approver	An extra approval level above the liaison. Only in Approver Mode.
View Only User	Reads analysis without changing it.

Stages of a task

1. **Awaiting Assignment**: sent to a department, no reviewer yet.
2. **Analysis Pending**: reviewers are working on it.
3. **Needs Approval**: the review is done and waits for the liaison. In Approver Mode there are three approval stages: Needs Liaison Approval, Needs Approval and Needs Final Approval.
4. **Completed**: the analysis is final.

Depending on your settings, a task can skip a stage. For example, if liaison approval is not required, a finished review goes straight to Completed.

Your menu

- Reviewers have **To-do List**, **Bills Assigned to You** and **Hearing Tasks** at the top of the left menu.
- Liaisons and approvers have the stage pages under **Bill Analysis**.
- Enterprise Admins also have **All Tasks**, **Reassign**, **Deleted** and **Configuration**.

What you see depends on your role and on the settings your Enterprise Admin chose, so your menu may be shorter than the one in these articles.

Bill Analysis Demonstration Video

Watch the video: https://vimeo.com/145998316

Linking a Custom Bill Analysis Task with a Bill or Amendment

Open the step-by-step walkthrough:
https://scribehow.com/shared/Linking_a_Custom_Bill_Analysis_Task_with_a_Bill_or_Amendment__pFL7hiHAT0qJV5GJCla_ng

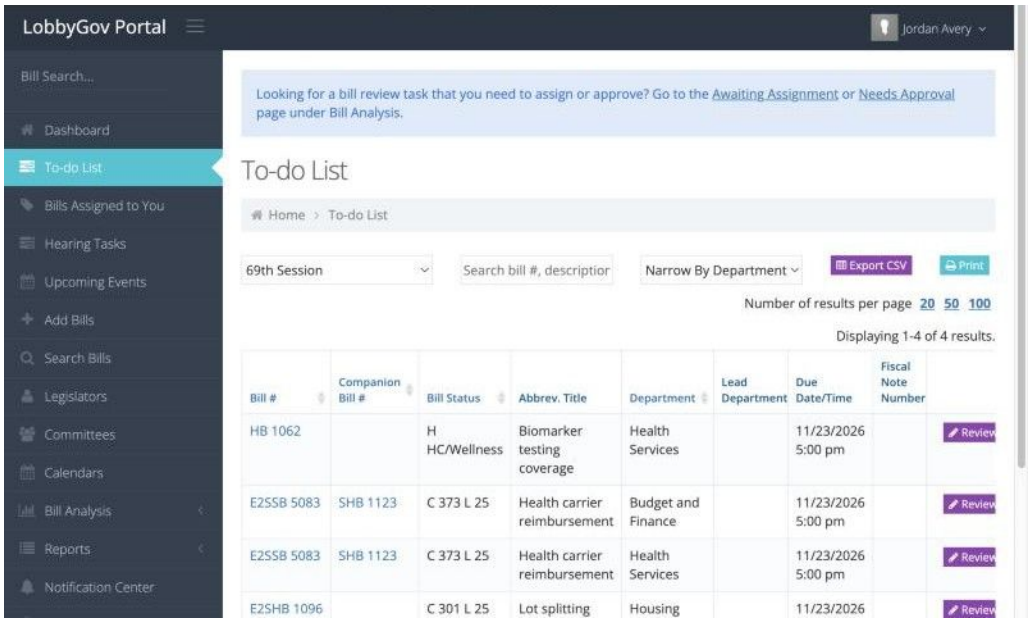
Reviewers: complete a bill analysis review

Applies to: Enterprise accounts

If you are a reviewer, bills assigned to you appear on your To-do List. This article shows how to analyze one and send it on.

Find your tasks

1. Sign in and click **To-do List** at the top of the left menu. It lists the reviews you still have to finish, with the department and the due date.
2. **Bills Assigned to You** lists everything assigned to you, including finished reviews.

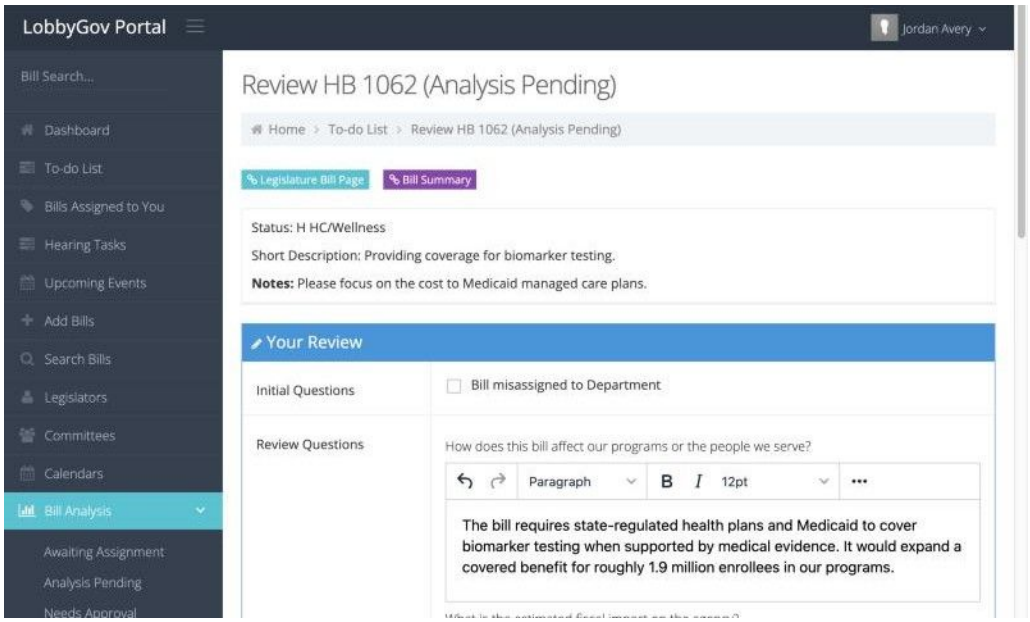


Claim the task, if asked

If the task was offered to several reviewers, you see a **Claim** button. Click it and confirm to take responsibility for the analysis. If a colleague got there first you will see "This task has been claimed by other reviewer."

Fill in the review

1. Click **Review** on the task.
2. Read the bill. **Legislature Bill Page** and **Bill Summary** open it, and any notes from the person who assigned it are shown under the status.
3. Under **Initial Questions**, tick **Bill misassigned to Department** if the bill does not belong to your department, or the No Organization Impact box if it does not affect your organization. These boxes appear only if your admin allows them.
4. Answer each of the **Review Questions**. Your answers save automatically as you type.
5. Choose a **Recommended Position** and **Recommended Priority**, and add an explanation if the box is shown.
6. Under **Attached Files**, click **Upload** to add supporting documents (up to 10 MB each).



Finish

1. At the bottom, set **Is your review complete?** to **Yes**.
2. Click **Save**.

Leave it on **No** and click **Save** to keep a draft and come back later. A position and priority are required to complete the review, unless you marked the bill misassigned or as having no impact.

After you finish

- The review goes to your liaison for approval, or straight to Completed if your department does not require approval.
- If the liaison rejects it, you get an email with their explanation and the task returns to your To-do List.
- **Download PDF** gives you a copy of your review.

Messages you may see on the form

- "The review is in approval processes." The form may be read-only.
- "Liaison has already completed their final review."
- "The task has been closed."

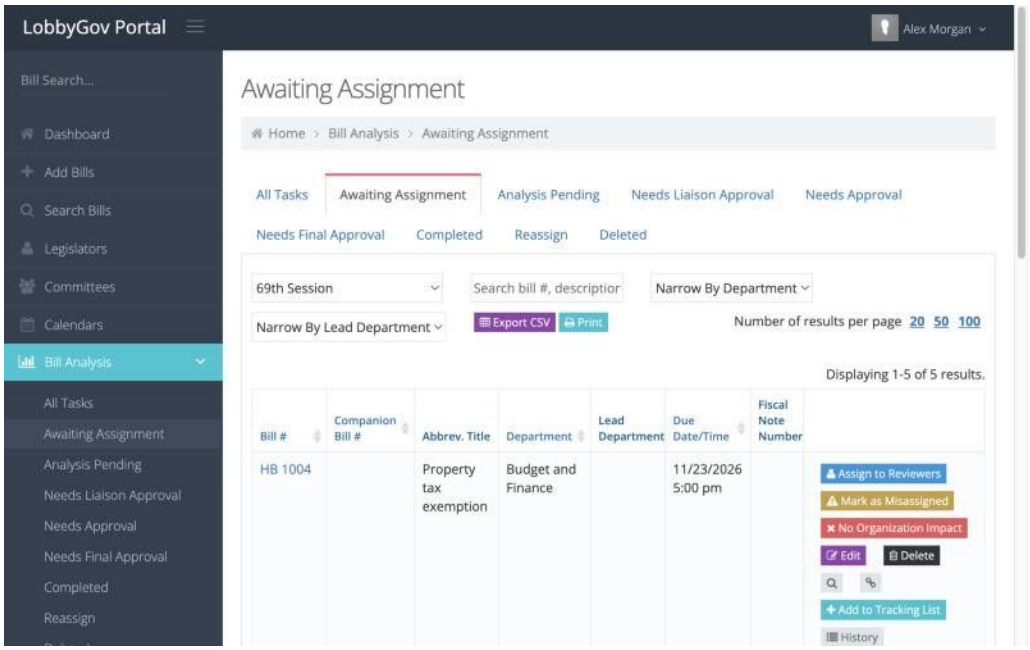
Liaisons: assign a bill to reviewers

Applies to: Enterprise accounts

When a bill is sent to your department, it waits for you to decide who should analyze it.

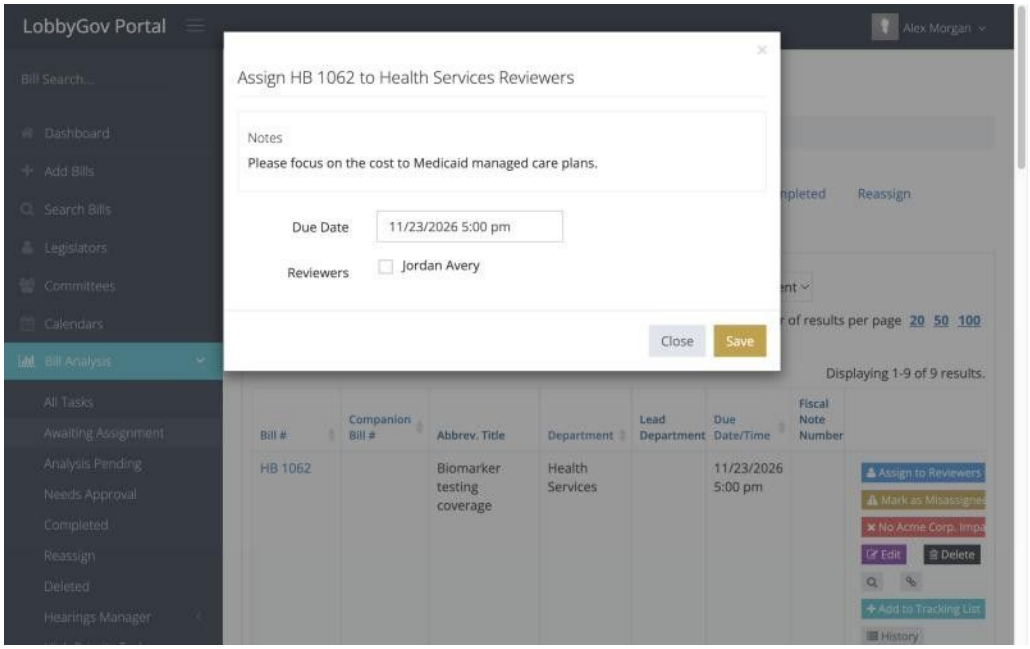
Open Awaiting Assignment

In the left menu, open **Bill Analysis**, then **Awaiting Assignment**. If email alerts are on, you also get a "New Bill Needs Assignment" email with a link.



Assign reviewers

1. Click **Assign to Reviewers** on the task.
2. Read any **Notes** from the person who sent the bill.
3. Check the **Due Date** and change it if you need to (and are allowed to).
4. Tick one or more **Reviewers**.
5. Click **Save**.



The task moves to **Analysis Pending** and the reviewers are emailed.

Extra options you may see

- **First to Claim**: with two or more reviewers ticked, the first to claim the task owns it.
- **Lead Reviewer**: if your organization writes one shared analysis, choose who can mark it complete.
- **Assign the task to sub-departments**: pass it down to a sub-department.
- **Custom Approver Flow**: in Approver Mode, add approval steps for this task only.

If the bill is not for your department

- **Mark as Misassigned**: tells the admins the bill belongs somewhere else.
- **No Organization Impact**: closes the task with no analysis because the bill does not affect your organization. Your account may word this button differently.

Both buttons appear only if your admin has allowed liaisons to use them.

Change your mind later

On **Analysis Pending**, click **Change Reviewers** to add or remove people. If a reviewer you remove has started work, you choose whether to copy their analysis to another reviewer or delete it. If they had finished, you choose whether to keep it.

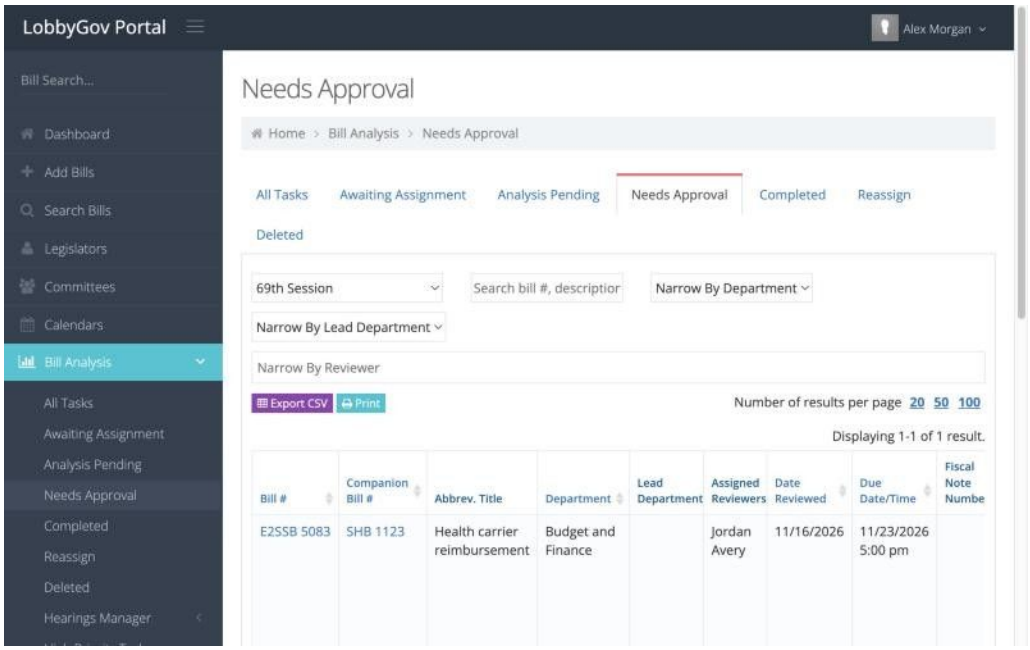
Liaisons and approvers: approve or reject a bill analysis review

Applies to: Enterprise accounts

When a reviewer finishes, the review comes to you. You read it, add your department's final recommendation and either approve it or send it back.

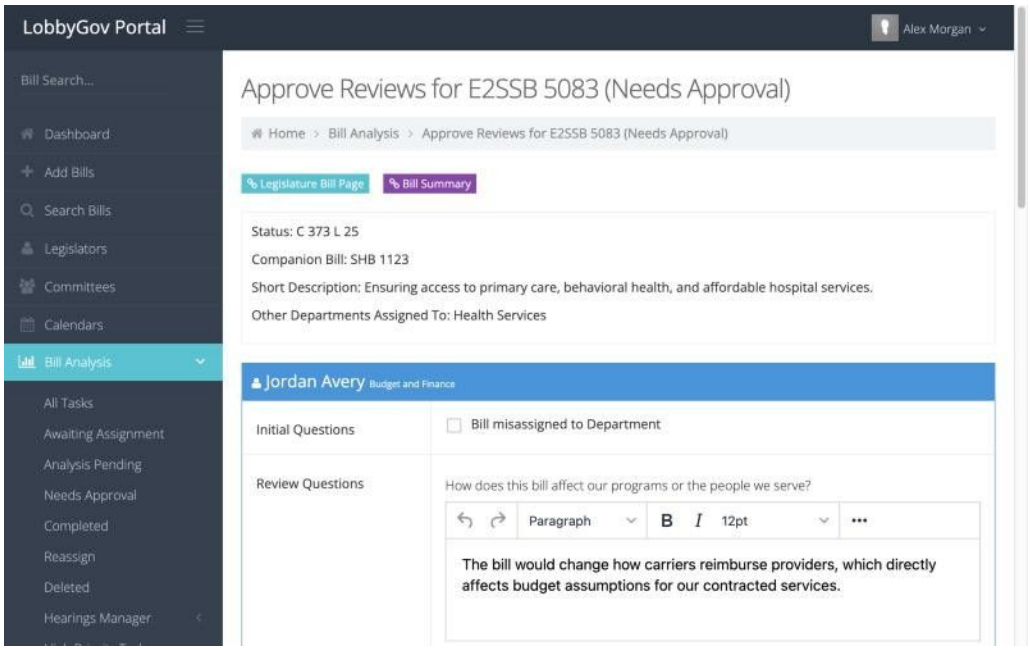
Open the reviews waiting for you

In the left menu, open **Bill Analysis**, then **Needs Approval**. In Approver Mode, liaisons use **Needs Liaison Approval** and approvers use **Needs Approval** or **Needs Final Approval**.



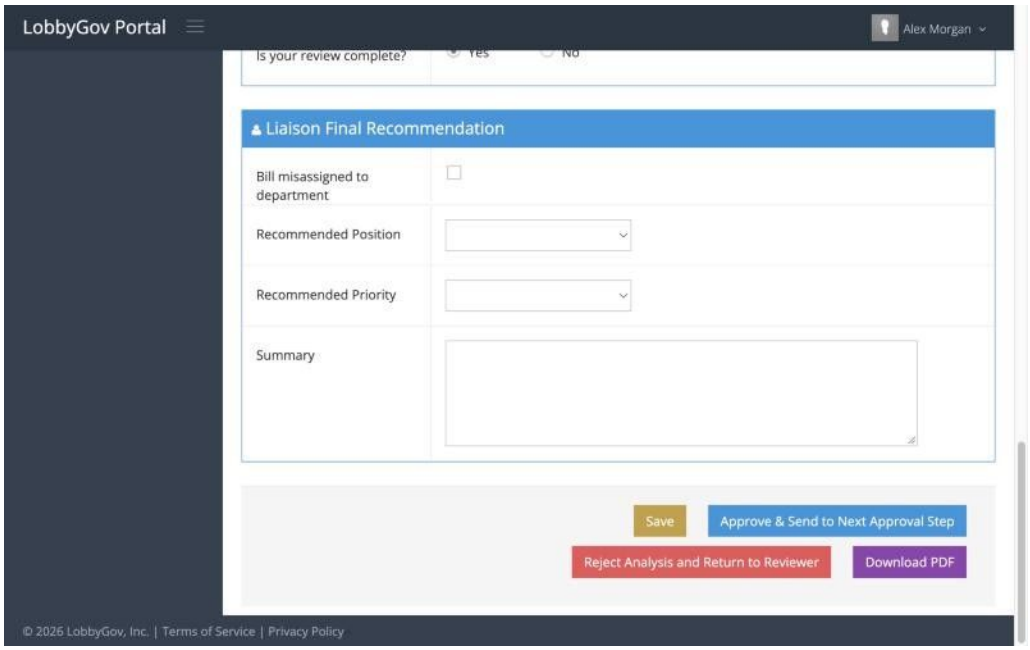
Read the review

1. Click **Approve Reviews** on the task.
2. Each reviewer has a panel showing their answers, recommended position and priority, and attached files. You can correct an answer if you need to.



Add the final recommendation

Scroll to **Liaison Final Recommendation** and choose the **Recommended Position** and **Recommended Priority** for your department. Add a **Summary** if the box is shown.



Choose what happens next

Button	What it does
Save	Keeps your work without approving, so you can come back.
Mark as Complete & Submit Review as Final	Approves the analysis. The task moves to Completed.
Approve & Send to Approver or **Approve & Send to Next Approval Step**	In Approver Mode, approves your step and passes the task up the approval route.
Reject Analysis and Return to Reviewer	Sends it back. You must type an **Explanation** (up to 900 characters). The reviewer is emailed and the task returns to Analysis Pending.
Download PDF	Downloads the analysis.

After final approval

- The task appears under **Completed**, where you can still use **Edit Reviews**, **View**, **Download PDF** and **Change to Not Complete**.
- If your admin set up triggers or Position Sync, the bill may be added to a tracking list and its position updated automatically.

Why is nothing waiting for me?

Your department may not require liaison approval, or may require it only for certain recommended positions or priorities. In those cases reviews are completed without you.

Work in more than one account as a Bill Analysis user

Applies to: Enterprise accounts

One login can belong to several LobbyGov accounts. For example, you might be a reviewer for one agency and a regular user in another account. If at least one of your accounts uses Bill Analysis, you work in one account at a time.

See which account you are in

The top bar shows **Account:** followed by the account you are working in. Everything on screen belongs to that account: the dashboard, folders and lists, reports, your menus and roles, and your bill analysis tasks.

Change account

1. Click **Account:** in the top bar.
2. Choose another account. You go to your home page in that account.

Good to know

- LobbyGov remembers the account you used last and opens it the next time you sign in.
- Opening a task from an email switches you to the right account automatically.
- You can have a different role in each account, so your menu may change when you switch.
- Your profile, password and sign-in settings are the same in every account.
- If an account has lapsed or is locked for an unpaid balance, it is listed only for the people who can fix that.

I do not see "Account:"

That is normal if you belong to only one account, or if none of your accounts uses Bill Analysis.

Enterprise Configuration and Management

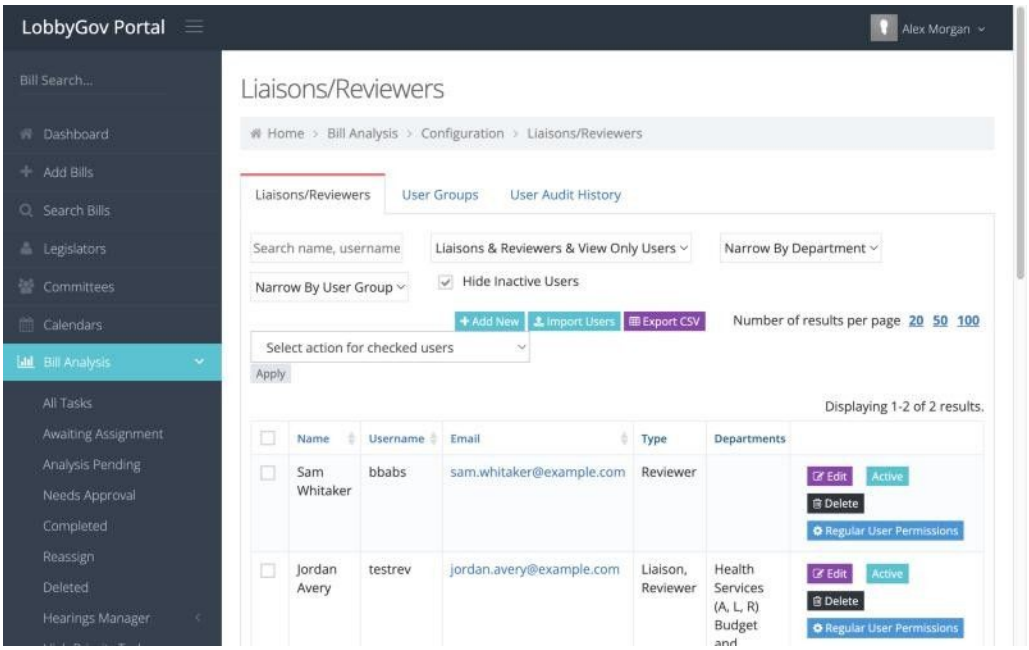
Enterprise User Management: add and manage liaisons, reviewers and approvers

Applies to: Enterprise accounts

Enterprise Admins manage everyone who takes part in bill analysis from the Liaisons/Reviewers page.

Open the page

In the left menu, open **Bill Analysis**, then **Configuration**, then **Liaisons/Reviewers**.



User types

- **Reviewer**: answers the analysis questions for bills assigned to them.
- **Liaison**: assigns bills to reviewers in their department and approves the reviews.
- **Approver**: an extra approval level, available in Approver Mode.
- **View Only User**: can read analysis but not change it.
- **Regular User**: also has the normal bill tracking features.

One person can hold more than one role, and a different role in each department. In the Departments column, the letters after a department show the roles: A for approver, L for liaison, R for reviewer.

Add a user

1. Click **Add New**.
2. Enter the person's name, email and username, and choose the **User Type**.
3. Choose their **Departments** and the role they have in each.
4. Optionally add them to **Groups**.
5. Click **Save**.

If the person already has a LobbyGov login, enter their email and click **Save**. The form shows who it is. Choose their roles, departments and groups and click **Save** again. Their name, username and password stay as they are.

New users count toward your plan's user limit.

Find users

Search by name or username, filter by user type, **Narrow By Department** or **Narrow By User Group**, and untick **Hide Inactive Users** to see everyone. **Export CSV** downloads the list.

Bulk actions

Tick the users, pick an action in **Select action for checked users** and click **Apply**. You can:

- Make users active or inactive, or delete them.
- Add or remove the liaison, reviewer or view-only role, or regular user permissions.
- **Copy access settings from another user**.
- Assign users to, or remove them from, a user group or a department.

Deactivating someone who has open tasks

When you deactivate or delete a user with open tasks, LobbyGov asks what to do with each one: **Remove user from the bill analysis task** or **Mark user's analysis as complete**.

Other tabs

- **User Groups**: create groups such as "Policy Directors" and manage their members. Groups are used by workflows and for filtering.
- **User Audit History**: shows who changed which user, and when.
- **Import Users** (button): add many users at once from a file.

Single sign-on accounts

If your account uses SAML single sign-on, each user also has **Allow Password Access**, which lets that person sign in with a LobbyGov password as well.

Single Sign-On (SSO) for Enterprise accounts

Applies to: Enterprise accounts

With single sign-on, your staff sign in to LobbyGov through your organization's identity provider (for example Microsoft Entra ID) and do not need a separate LobbyGov password. LobbyGov uses the SAML standard.

Set it up

1. Ask LobbyGov support to enable SSO and an enterprise subdomain for your account.
2. Sign in as a super user. In the left menu, open **Account Settings**, then **Subusers & Sharing**, and click the **SAML Configuration** tab.
3. Enter your identity provider's details and save. You will see "Configuration Updated Successfully!".

One identity provider can be set up per account. For a step-by-step example, see the Microsoft Entra ID setup article.

Settings that work with SSO

Setting	Where	What it does
Allow Password Access	On each user, under Liaisons/Reviewers or Subusers & Sharing	Lets that person also sign in with a LobbyGov password. Useful for an admin who must get in if your identity provider is down, or for outside users who are not in your directory.
Alert Email Links Should Trigger SSO Login	Bill Analysis, Configuration, Settings, Communication Settings	Links in bill analysis emails open your SSO sign-in page. Requires an enterprise subdomain.

Tips

- Keep password access on for at least one admin until you have tested SSO with a regular user.
- A user's email in LobbyGov must match the email your identity provider sends.
- If sign-in fails after setup, contact LobbyGov support with the time of the attempt and the user's email.

Custom Workflows: approval routes and notifications in Approver Mode

Applies to: Enterprise accounts with Approver Mode

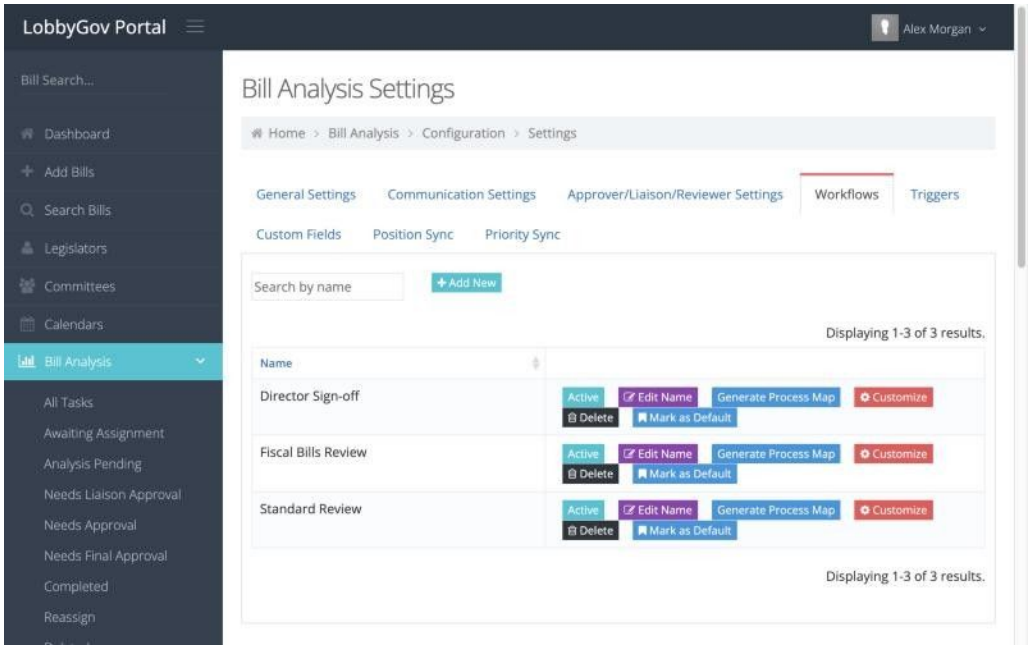
A workflow decides who is notified about a bill analysis task and which approval steps it goes through after the reviewer finishes. You can have different workflows for different templates, departments, or lead and non-lead assignments.

Before you start

Workflows need **Approver Mode**. Turn it on under **Bill Analysis**, **Configuration**, **Settings**, **General Settings**. The **Workflows** tab then appears.

Create a workflow

1. Open **Bill Analysis**, **Configuration**, **Settings** and click the **Workflows** tab.
2. Click **Add New**, type a name and click **Save**.
3. Click **Customize** next to the new workflow.



Workflow Customizer options

Section	Choices
Workflow Tasks	**All Tasks**, or only tasks that use **The Following Templates**.
Applicable Departments	**All Departments**, or **The Following Departments** (sub-departments can be ticked separately).
Lead/Non-lead	Apply the workflow when the department is the **Lead**, **Non-Lead**, or **Either**.
After a task is assigned to a reviewer	**Do Nothing**, or **Send Notifications** to all liaisons in the reviewer's department, all approvers in the reviewer's department, or people in the department who belong to the user groups you tick.
After reviewer completes a task	Notify liaisons, approvers, other reviewers in the same department assigned to the bill, other reviewers assigned to the bill in any department, or people in the user groups you tick.

Approval routes

Click **Add Approval Route** to describe who approves the analysis.

1. Enter an **Approval Route Description**.
2. Under **Applies to**, choose **All Tasks**, or tasks with certain recommended priorities or positions. This lets a High priority or Oppose recommendation take a longer route than a routine one.
3. Click **Add Approval Step** for each step. A step can go to all approvers in the reviewer's department, approvers in the department who belong to certain user groups, all liaisons in the department, or liaisons in certain user groups.
4. Under "After the task receives all necessary approvals", choose **Do nothing** or pick who to notify.
5. Click **Save**.

If a workflow has several routes, the first route whose conditions match the task is used.

Other actions

- **Mark as Default**: flags the workflow as your default.
- **Generate Process Map**: opens a PDF diagram of the saved workflow. Save your changes first.
- **Active**: click to switch the workflow off without deleting it.
- **Edit Name** and **Delete**.

Related settings

- **Allow custom approver flows** lets the person assigning a task build a one-off route for that task.
- **Liaisons Approve in Absence of Approver Unless Custom Workflow Exists** covers departments that have no approvers.
- User groups are managed under **Configuration**, **Liaisons/Reviewers**, **User Groups**.

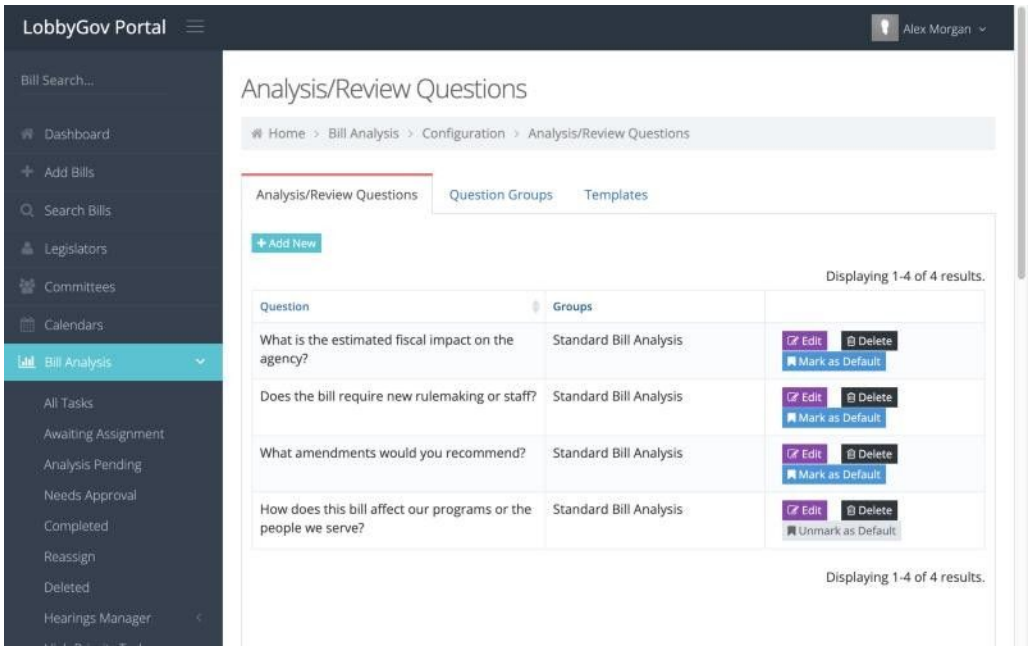
Bill Analysis Questions, Question Groups and Templates

Applies to: Enterprise accounts

Questions and templates are the forms your reviewers fill in. You decide what is asked, and you can ask different things for different kinds of bills.

Open Questions & Templates

In the left menu, open **Bill Analysis**, then **Configuration**, then **Questions & Templates**. The page has three tabs.



Analysis/Review Questions

These are single free-text questions, up to 255 characters each.

1. Click **Add New**, type the question and choose the groups it belongs to.
2. Click **Save**.

Mark as Default pre-ticks a question when someone adds a bill for analysis. **Unmark as Default** reverses it.

Question Groups

A group is a set of questions you can pick with one tick, for example "Standard Bill Analysis". A group can be available to all departments or to one department.

Templates

A template is a complete form that you design. Use templates when different work needs a different layout, for example a "Fiscal Impact Review" and a "Policy Analysis".

1. Open the **Templates** tab, click **Add New**, name the template and save.
2. Click **Customize** to build the form.
3. Choose whether the template shows the No Organization Impact checkbox, the "mark as misassigned" checkbox, the position select box and the priority select box.
4. Click **Mark as Default** on the template that should be selected automatically.

Where they are used

- When a bill is added for analysis, the person adding it ticks a template, a question group or individual questions for each department under **Select Bill Analysis Questions/Template**. They can also type a **One-time Question** for that bill only.

- Template fields and questions can be shown as columns in Dashboard Manager panels and Custom Views.
- In Approver Mode, a workflow can apply only to tasks that use certain templates.

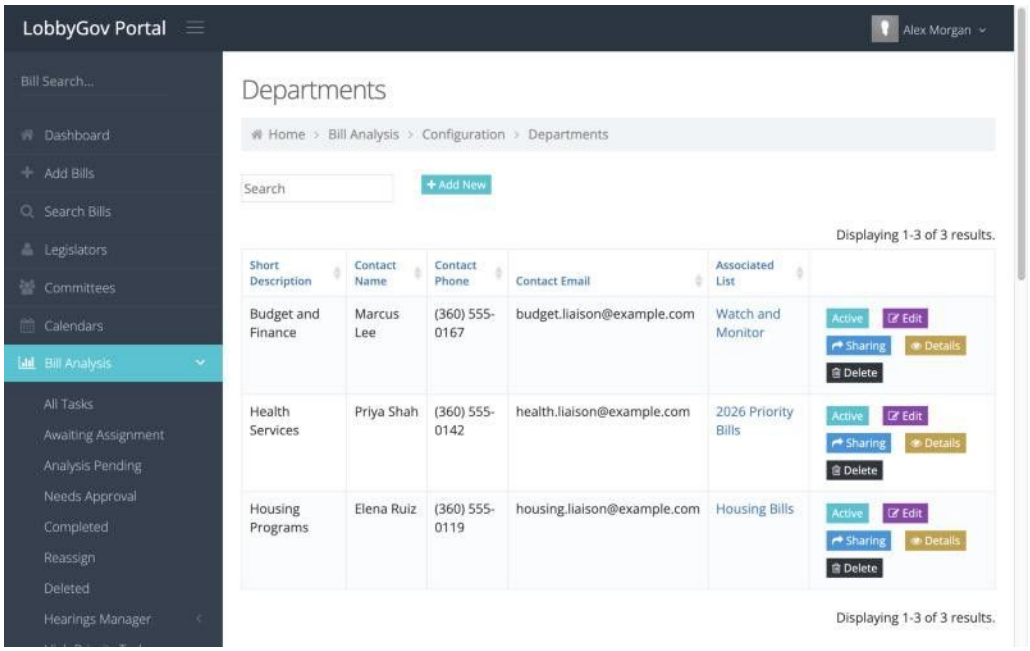
Managing Departments for Bill Analysis

Applies to: Enterprise accounts

Departments are the groups inside your organization that analyze bills. Every bill analysis task is assigned to one or more departments, and each department has its own liaisons and reviewers. Your account may call them something else, such as Offices or Divisions.

Add a department

1. In the left menu, open **Bill Analysis**, then **Configuration**, then **Departments**.
2. Click **Add New**.
3. Fill in the form (see the fields below) and click **Save**.



Department fields

Field	What it is for
Short Description	The department's name as it appears on task lists and forms.
Contact Name, **Contact Phone**, **Contact Email**	The person to contact about this department's analysis.
Associated List	The tracking list linked to this department. Triggers and Position Sync can add or update bills on it.

Field	What it is for
This is a sub-department of	Makes the department a sub-department of another one.
Allow this Department to view all other Departments	Lets this department's users see the analysis of every other department.

Buttons on each department

- **Active**: click to make the department inactive so it can no longer be chosen for new tasks.
- **Edit**: change the fields above.
- **Sharing**: choose which other departments can see this department's analysis.
- **Details**: open the department page, with its task counts, its task list and its own **Settings** panel.
- **Delete**: remove the department.

Put people in a department

People are added to departments from **Configuration**, **Liaisons/Reviewers**. Edit a user and choose their departments and their role in each (liaison, reviewer or approver).

Rename "Department"

To use a different word across the portal, change **Department Name** under **Configuration**, **Settings**, **General Settings**.

Custom Tasks: assign analysis work that is not a bill

Applies to: Enterprise accounts

A custom task sends any piece of work through your bill analysis process: a draft bill, a budget proviso, a rule, a request from leadership. It is assigned, reviewed and approved exactly like a bill.

Who can add one

Enterprise Admins, liaisons and approvers.

Add a custom task

1. In the left menu, open **Bill Analysis**, then **Add Custom Task**.
2. Enter a **Short Description**. This is the task's name on every list.
3. Choose the **State Session**.
4. Optionally search for a **Related Bill or Amendment** to link the task to it.
5. Tick the **Task Review Departments**, and choose the questions or template for each.
6. Fill in any custom fields your account uses.
7. Check the **Task Review Due Date/Time**, and choose a **Lead Department** if your account tracks them.

8. Under **Attached Files**, click **Upload** to add documents. You can also tick **Send attachments with alert email**.
9. Click **Add Task**. You will see "The task was added successfully".

What happens next

The task appears in **Awaiting Assignment** (or goes straight to the reviewers you chose) and then follows the normal stages: Analysis Pending, Needs Approval and Completed.

Link a custom task to a bill later

See "Linking a Custom Bill Analysis Task with a Bill or Amendment" in this help center.

Creating and Managing Bill Analysis Tasks

Applies to: Enterprise accounts

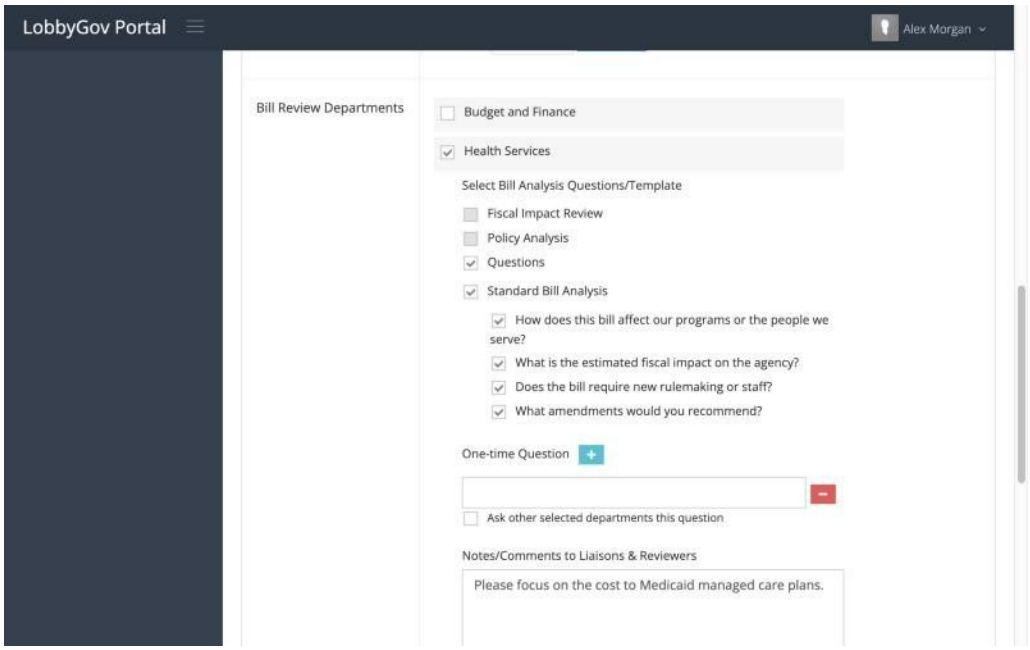
A bill analysis task asks one or more departments to review a bill. This article covers creating a task and managing it through each stage.

Who can create tasks

- Enterprise Admins.
- Liaisons, if "Allow Liaisons to Add Bills for Review" is on.
- Approvers, if "Allow Approvers to Add Bills for Review" is on.

Send a bill for analysis

1. Click **Add Bills** in the left menu and enter the bill number. You can also start from **+ Add** or **BA Add** on a search result or list.
2. Under **Bill Review Departments**, tick each department that should analyze the bill. If your account tracks lead departments, choose the **Lead**.
3. For each department, tick the template, question group or questions under **Select Bill Analysis Questions/Template**. Add a **One-time Question** if you need one.
4. If reviewer selection is shown, choose the reviewers. Otherwise the department's liaison will assign them.
5. Type any **Notes/Comments to Liaisons & Reviewers**.
6. Check the **Bill Review Due Date/Time** and submit.

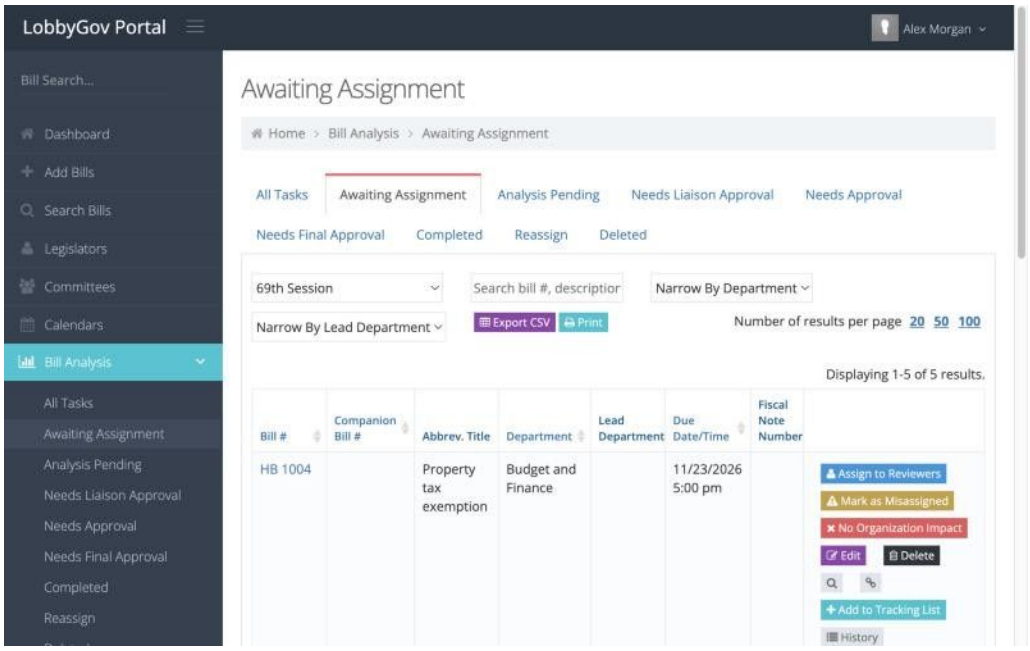


The stages of a task

Stage	Meaning
Awaiting Assignment	No reviewer has been chosen yet.
Analysis Pending	Reviewers are working on it.
Needs Approval	The review is finished and waits for a liaison. In Approver Mode this becomes Needs Liaison Approval, Needs Approval and Needs Final Approval.
Completed	The analysis is final.

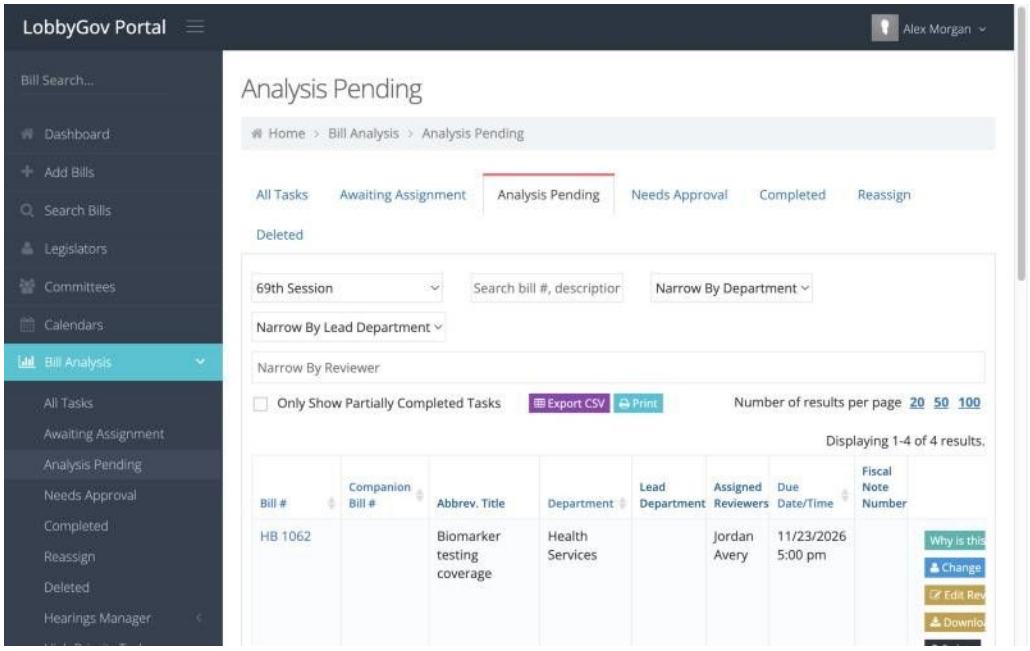
Each department's assignment moves through the stages on its own, so one bill can be Completed for one department and Analysis Pending for another.

Awaiting Assignment



- **Assign to Reviewers**: choose reviewers and a due date.
- **Mark as Misassigned**: the bill does not belong to this department. Admins then find it under **Reassign**.
- **No Organization Impact**: complete the task with no analysis.
- **Edit**, **Delete**, **Add to Tracking List** and **History**.

Analysis Pending



- **Why is this pending?**: shows which reviewers have not finished.

- **Change Reviewers**: add or remove reviewers. If a removed reviewer had started, you choose whether to copy their analysis to someone else or delete it.
- **Edit Reviews** and **Download PDF**.
- **Close Task and Mark as Complete** (admins): finish the task without waiting for the remaining reviews.

Completed

Completed tasks have **Edit Reviews**, **Download PDF**, **View** and **Change to Not Complete**, which reopens the task.

All Tasks, Reassign and Deleted

- **All Tasks** lists every task with filters for session, department, lead department, reviewer and active or inactive bills. Click the plus sign on a row to see each department's assignment.
- **Reassign** lists tasks that were marked misassigned so an admin can move them to the right department.
- **Deleted** lists deleted tasks, which an admin can restore.

Most lists have **Export CSV** and **Print**.

Common messages

- "You have to at least check one department!"
- "You have to select a Bill Analysis Template or Questions for this department!"
- "The bill(s) ... has/have already been assigned to ..."
- "Duedate cannot be blank."

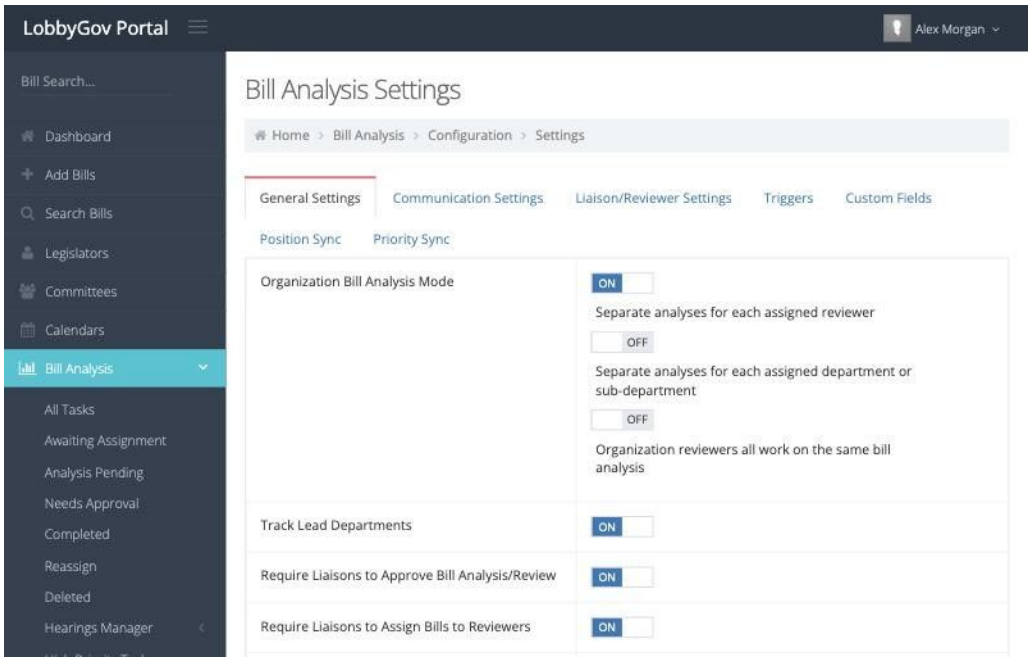
Bill Analysis General Settings: every option explained

Applies to: Enterprise accounts

General Settings control how bill analysis works across your whole account: how reviews are organized, who assigns and approves them, what happens when a bill changes, default due dates and the wording your users see. Only Enterprise Admins can change them.

Open General Settings

1. In the left menu, open **Bill Analysis**, then **Configuration**, then **Settings**.
2. Stay on the **General Settings** tab.
3. Change the options you need, then click **Save** at the bottom of the tab. You will see "Success! Changes saved!".



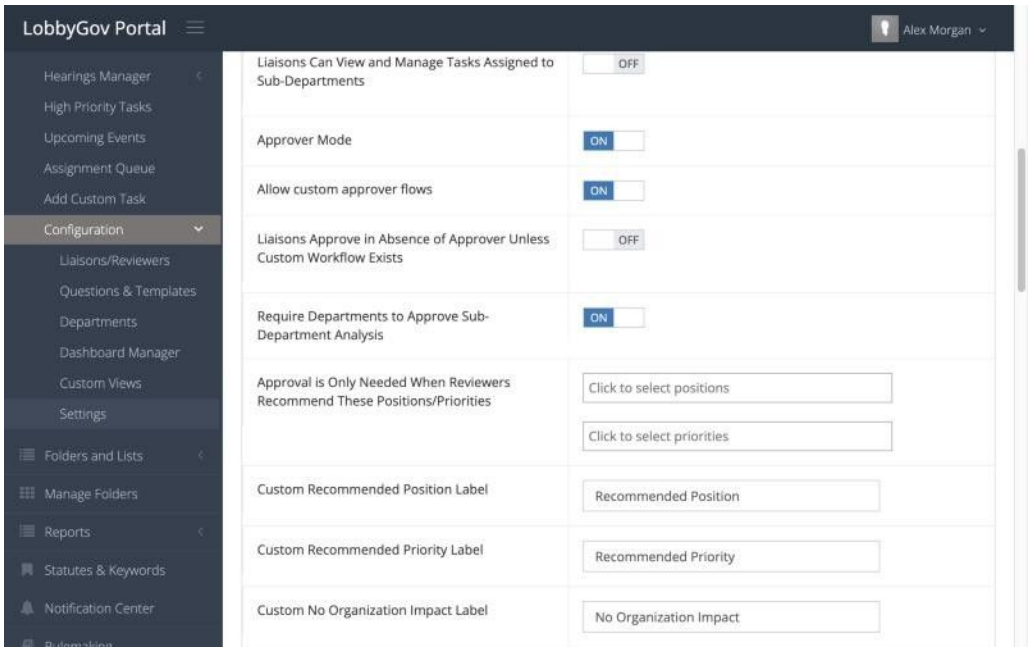
How analysis is organized

Setting	What it does
Organization Bill Analysis Mode	Choose one of three modes. **Separate analyses for each assigned reviewer**: every reviewer fills in their own form. **Separate analyses for each assigned department or sub-department**: the reviewers in a department share one form. **Organization reviewers all work on the same bill analysis**: one form for the whole organization, and only the lead reviewer can mark it complete.
Track Lead Departments	Lets you name one department as the lead for each task. Adds the Lead Department column and filter to task lists. Position Sync and Priority Sync options that rely on the lead department need this on.
Liaisons Can View and Manage Tasks Assigned to Sub-Departments	Gives a department's liaisons access to tasks that belong to its sub-departments.
Show All Tasks Page to All Bill Analysis Users	Off: only Enterprise Admins see **All Tasks**. On: liaisons, approvers and reviewers see it too.

Assignment

Setting	What it does
Require Liaisons to Assign Bills to Reviewers	On: when a department has liaisons, the person adding the bill cannot pick reviewers. The task waits in **Awaiting Assignment** until a liaison assigns it. Off: reviewers can be chosen when the bill is added.
First to Claim	Sets the default for new assignments. When a task goes to two or more reviewers, the first one to click **Claim** owns the analysis. It is not available where reviewers share one form.

Approval



Setting	What it does
Require Liaisons to Approve Bill Analysis/Review	On: a completed review moves to **Needs Approval** and a liaison must approve it. Off: the task goes straight to **Completed** when the reviewer finishes (unless Approver Mode is on).
Approver Mode	Adds the Approver role and splits approval into three stages: **Needs Liaison Approval**, **Needs Approval** and **Needs Final Approval**. It also adds the **Workflows** tab and the Approver column of role settings.
Allow custom approver flows	Shown with Approver Mode. Lets the person

Setting	What it does
	assigning a task build a one-off approval route for that task.
Liaisons Approve in Absence of Approver Unless Custom Workflow Exists	Shown with Approver Mode. If a department has no approvers, its liaisons do the approver step.
Require Departments to Approve Sub-Department Analysis	After a sub-department finishes, its parent department must approve the analysis as well.
Approval is Only Needed When Reviewers Recommend These Positions/Priorities	Leave both boxes empty to require approval every time. If you pick positions or priorities, only reviews that recommend one of them wait for approval. All other reviews are approved automatically.

Wording and labels

Setting	What it does
Department Name	The word your account uses for departments, for example Office, Division or Agency. It replaces "Department" on menus, pages and emails.
Custom Recommended Position Label and **Custom Recommended Priority Label**	Rename the two recommendation fields on review forms and task lists.
Custom No Organization Impact Label	Rename the "No Organization Impact" checkbox and button, for example "No Agency Impact".
Ask for position/priority recommendation explanation	Adds an Explanation box next to the position and priority on the review form.
Custom Watch Bills Description	The name of the watch page in the Bill Analysis menu when bill watching is on.

New bill versions and amendments

Setting	What it does
Automatically Create Separate Tasks for New Bill Versions	When a bill you are analyzing gets a new version, LobbyGov creates a new task for it.
Automatically Import Prior Bill Analyses on Task Creation	Carries the earlier version's analysis into the new task so reviewers do not start from a blank form.

Setting	What it does
Place New Bill Versions in Assignment Queue	Used when automatic tasks are off. New versions wait in **Assignment Queue**, where you choose **Assign** or **Dismiss**.
Automatically Create New Tasks for Proposed Amendments, **Automatically Import Prior Bill Analyses on Amendment Task Creation**, **Place New Bill Amendments in Assignment Queue**	The same three choices for proposed amendments.

Due dates

Setting	What it does
Default Days for Bill Review/Analysis	How many days (0 to 30) after a bill is added the review is due. The due date can still be changed on each task.
Days Should Exclude Weekends	Count working days only.
Default Due Date Time	The time of day the review is due, for example 5:00 pm.

Extra features

Setting	What it does
Allow Bills to be Watched Without Analysis Assignment	Adds the option **Watch and Do Not Assign for Analysis** when adding a bill, and a watch page in the Bill Analysis menu.
Enable Hearings Manager	Turns on Upcoming Hearings, Past Hearings, Needs Approval and Templates under **Hearings Manager**.

Contact details shown to your users

Responsible Office/Dept. Name, **General Contact Name**, **Email** and **Phone**, and **Tech Contact Name**, **Email** and **Phone** appear in the support information window that Bill Analysis users can open. Fill them in so liaisons and reviewers know who inside your organization to ask for help.

Settings a department can override

Several settings (liaison approval, liaison assignment, First to Claim, alerts and the role permissions) can be set differently for one department. A department override wins over the account setting, so if a change here does not seem to take effect, check that department's **Settings** panel.

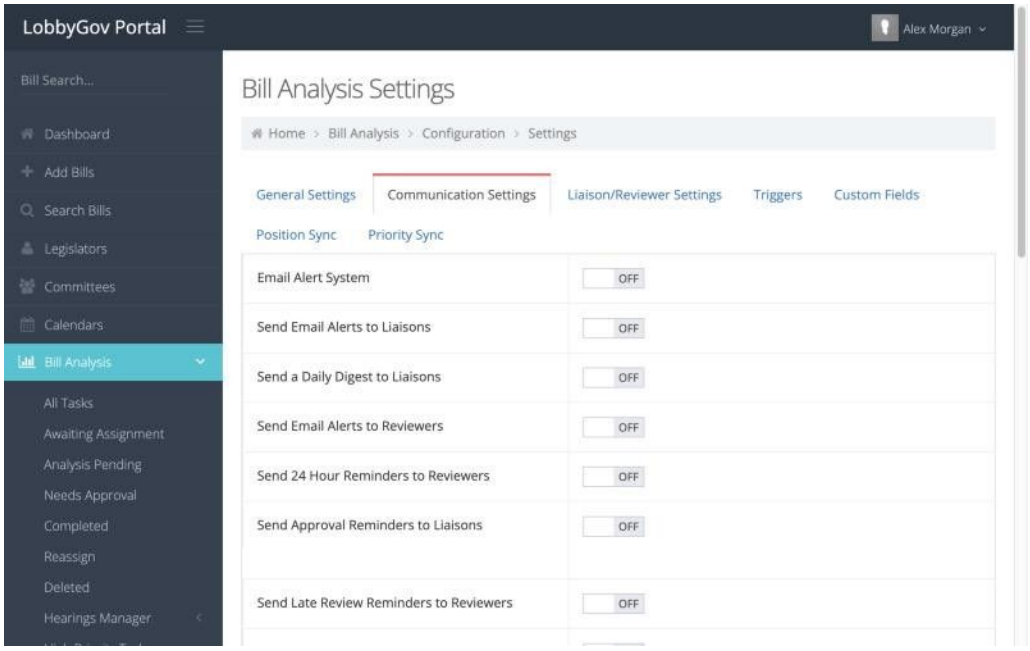
Bill Analysis Communication Settings and email alerts

Applies to: Enterprise accounts

Communication Settings decide which bill analysis emails LobbyGov sends, who gets them and what they say. Only Enterprise Admins can change them.

Open Communication Settings

1. In the left menu, open **Bill Analysis**, then **Configuration**, then **Settings**.
2. Click the **Communication Settings** tab.
3. Switch the alerts on or off, then click **Save**.



The master switch

Email Alert System turns all bill analysis email on or off. If it is off, none of the alerts below are sent, whatever their own switches say. Turn it on first.

Alerts to liaisons

Setting	What it does
Send Email Alerts to Liaisons	Emails a department's liaisons when a new bill needs assignment and when a review needs their approval.
Send a Daily Digest to Liaisons	Sends liaisons a daily summary email.
Send Approval Reminders to Liaisons (and Approvers, in Approver Mode)	Reminds them about reviews that are still waiting for approval.

Alerts to reviewers

Setting	What it does
Send Email Alerts to Reviewers	Emails reviewers when they are assigned a task ("New Bill Review Task").
Send 24 Hour Reminders to Reviewers	Reminds reviewers the day before a review is due.
Send Late Review Reminders to Reviewers	Reminds reviewers when a review is past its due date.

Review complete alerts

Setting	What it does
Send Review Complete Alerts	Tick the Enterprise Admins who should be emailed when a department finishes its review of a bill.
Send Alerts to Above Recipients When Each Reviewer Completes their Analysis	Also emails those people each time one reviewer finishes. It applies when each reviewer has a separate analysis.

Hearings Manager alerts

Setting	What it does
Hearing Manager Task Complete Alerts	Emails the people you tick when a hearing monitoring task is completed.
Hearing Manager Task Change Alerts	Emails the assigned reviewer and the admins you tick when a hearing task changes.

Single sign-on links

Alert Email Links Should Trigger SSO Login makes the links in alert emails open your single sign-on page. It only works if your account has an enterprise subdomain and SSO is set up.

Custom subjects and messages

You can write your own subject line and opening message for the three main alerts:

- **New Bill Assigned** subject and message (to reviewers)
- **New Bill Needs Assignment** subject and message (to liaisons)
- **Review Needs Approval** subject and message, one for liaisons and, in Approver Mode, one for approvers

Leave a box empty to use the standard LobbyGov wording.

Emails LobbyGov can send

When	Who gets it
A task needs assignment	Department liaisons
A reviewer is assigned a task	The reviewer
A reviewer is removed from a task	That reviewer
A First to Claim task is claimed	The other reviewers and the person who assigned it
A reviewer finishes	Review complete recipients, or the workflow's recipients
A review needs approval	Liaisons, approvers or the workflow step's approvers
A review is rejected	The reviewer and earlier approvers
A bill is watched without analysis	Department liaisons

Good to know

- Alerts to reviewers and liaisons can be switched on or off for a single department from that department's **Settings** panel.
- In Approver Mode, a workflow can replace the standard recipients with its own notification rules.

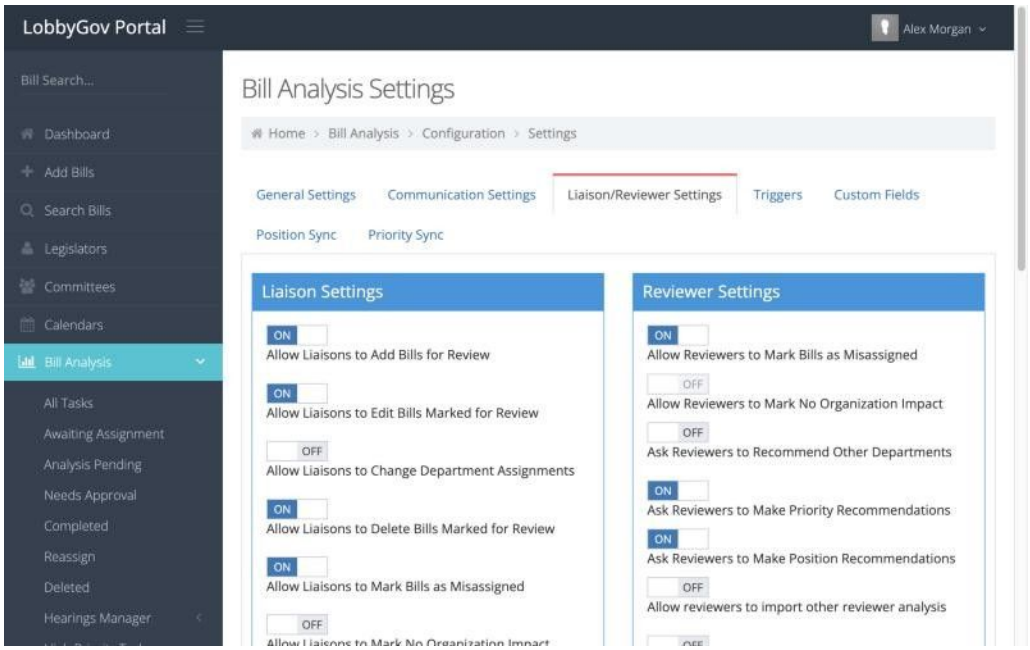
Liaison, Approver and Reviewer Settings: what each role is allowed to do

Applies to: Enterprise accounts

This tab sets what liaisons, approvers and reviewers can do in Bill Analysis, and which pages of the portal they can see. Enterprise Admins can always do everything.

Open the role settings

1. In the left menu, open **Bill Analysis**, then **Configuration**, then **Settings**.
2. Click the **Liaison/Reviewer Settings** tab. With Approver Mode on, the tab is called **Approver/Liaison/Reviewer Settings** and has a third column for approvers.
3. Switch options on or off, then click **Save**.



Liaison Settings

Setting	When it is on
Allow Liaisons to Add Bills for Review	Liaisons can send bills for analysis from Add Bills.
Allow Liaisons to Edit Bills Marked for Review	Liaisons see the **Edit** button on tasks.
Allow Liaisons to Change Department Assignments	When editing a task, liaisons can change which departments it is assigned to.
Allow Liaisons to Delete Bills Marked for Review	Liaisons see the **Delete** button on tasks.
Allow Liaisons to Mark Bills as Misassigned	Liaisons can flag that a bill does not belong to their department. Admins then see it under **Reassign**.
Allow Liaisons to Mark No Organization Impact	Liaisons can close a task with no analysis because the bill does not affect the organization.
Ask Liaisons to Recommend Other Departments	Liaisons can suggest other departments that should look at the bill.
Ask Liaisons to Make Bill Priority Recommendations and **Position Recommendations**	The liaison's final recommendation includes a priority and a position.
Include Summary Textbox for Liaison When	Adds a Summary box to the Liaison Final

Setting	When it is on
Approving	Recommendation.
Allow Liaisons to Assign Hearings	Liaisons can assign hearing monitoring tasks in Hearings Manager.
Do not allow liaisons to adjust the due date/time for task assignments	Liaisons must keep the due date that was set when the bill was added.

Approver Settings (Approver Mode only)

Approvers have the same family of switches as liaisons: add, edit and delete bills marked for review, mark misassigned, mark No Organization Impact, recommend other departments, make priority and position recommendations, include a summary textbox when approving, and assign hearings.

Reviewer Settings

Setting	When it is on
Allow Reviewers to Mark Bills as Misassigned	The review form has a "Bill misassigned to Department" checkbox.
Allow Reviewers to Mark No Organization Impact	The review form has a No Organization Impact checkbox.
Ask Reviewers to Recommend Other Departments	Reviewers can suggest other departments.
Ask Reviewers to Make Priority Recommendations and **Position Recommendations**	The review form asks for a recommended priority and position. They are then required to complete the review.
Allow reviewers to import other reviewer analysis	Reviewers get an **Import** button to copy another reviewer's answers into their own form.
Allow assigned reviewers to continue to make edits after the bill analysis is approved or completed	Reviewers can keep editing their answers after approval. When off, the form becomes read-only once it enters approval.

Hide pages

For each role you can hide pages that are not part of their job: **Upcoming Events**, **Search Bills**, **Legislators**, **Committees**, **Reports** and **Tools & Wizards**. Reviewers do not have a Reports option. Hidden pages disappear from that role's left menu.

Different rules for one department

Most of these switches can be overridden for a single department. Open **Configuration**, then **Departments**, click **Details** on the department and use its **Settings** panel.

Your account may use different words for "Department" and "No Organization Impact". Admins can rename both under General Settings.

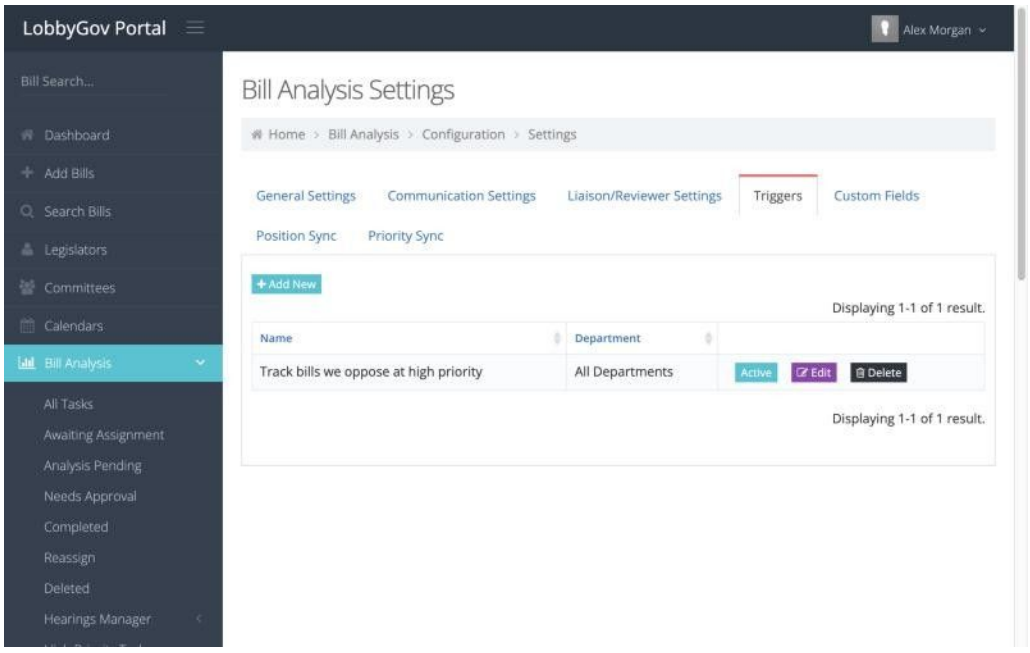
Triggers: add analyzed bills to tracking lists automatically

Applies to: Enterprise accounts

A trigger watches for finished bill analysis and, when the recommendation matches your conditions, puts the bill on a tracking list for you. For example: every bill a department opposes at high priority goes on your "Priority Bills" list.

Create a trigger

1. In the left menu, open **Bill Analysis**, then **Configuration**, then **Settings**.
2. Click the **Triggers** tab, then **Add New**.
3. Enter a **Trigger Name** that says what it does.
4. Choose a **Department** to limit the trigger to one department, or leave it on all departments.
5. Under "When a liaison submits bill analysis that meets one or more of the following conditions", tick the recommended positions and priorities that should set it off.
6. Under "Add the bill to one or more of these tracking lists", choose a named tracking list, or choose the department's associated tracking list.
7. Click **Save**.



When a trigger runs

A trigger runs when the final analysis is submitted, that is when a liaison (or the last approver) completes the review. It does not run while a review is still pending or waiting for approval.

Manage triggers

- **Active**: click to switch a trigger off without deleting it. Click again to switch it back on.
- **Edit**: change the name, department, conditions or lists.
- **Delete**: remove the trigger. Bills it already added stay on their lists.

Tips

- To use "the department's associated tracking list", first set an **Associated List** on each department under **Configuration**, then **Departments**.
- Triggers add bills to lists. To copy the recommended position or priority onto the list as well, use Position Sync and Priority Sync.

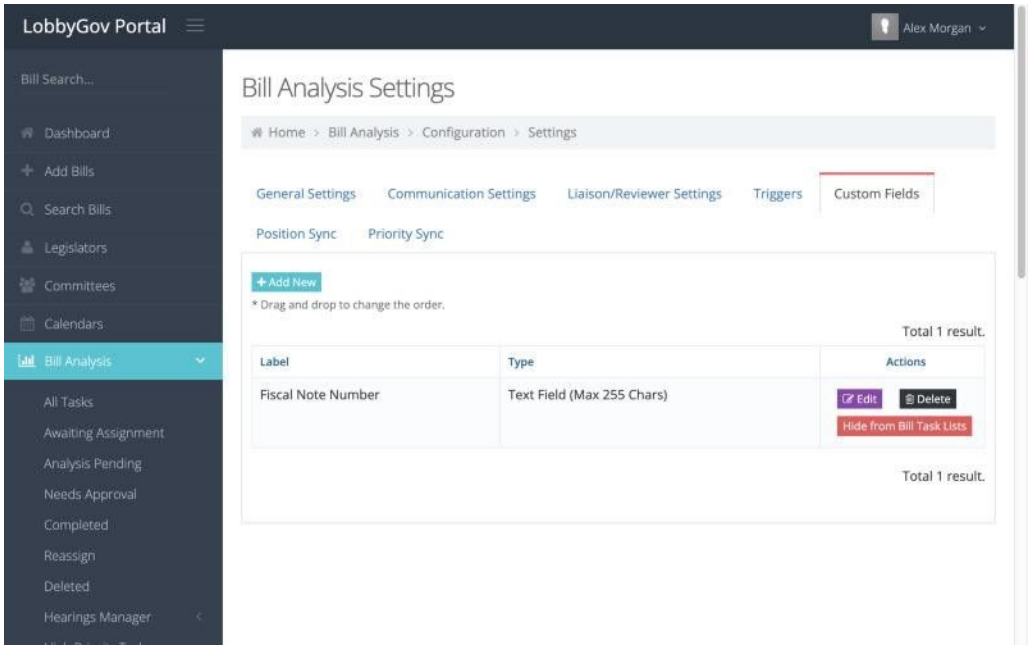
Bill Analysis Custom Fields

Applies to: Enterprise accounts

Custom fields let you record your own information on every bill analysis task, such as a fiscal note number, an internal tracking ID or the staff member responsible.

Add a custom field

1. In the left menu, open **Bill Analysis**, then **Configuration**, then **Settings**.
2. Click the **Custom Fields** tab, then **Add New**.
3. Enter the **Label** and choose a **Type**.
4. Choose the options you want (see below) and click **Save**.



Field types

- **Text Field (Max 255 Chars)**: a short single line.
- **Large Text Box**: longer notes.

- **Date**
- **Dropdown**: pick one value from a list you define.
- **Checkboxes**: pick several values.
- **Hyperlink**: a web link.
- **Department Single Selection** or **Multiple Selection**: pick from your departments.
- **Bill Analysis User Single Selection** or **Multiple Selection**: pick from your Bill Analysis users.

Options

Option	What it does
Show on Bill Task Lists	Adds the field as a column on All Tasks, Awaiting Assignment, Analysis Pending and the other task lists. Use **Hide from Bill Task Lists** on the tab to remove the column later.
Allow this setting to be set and managed at the Department level	Each department keeps its own value for the field.
Field value applies to all tasks for the same bill	The value is shared by every task for that bill, including tasks for new versions.

Where the fields appear

- On Add Bills and Add Custom Task, so the value can be entered when the task is created.
- On task lists, if you chose to show them.
- As columns you can add to Dashboard Manager panels and Custom Views.

Reorder, edit or delete

Drag and drop rows on the tab to change the order. Use **Edit** to change a field and **Delete** to remove it.

These fields belong to Bill Analysis tasks. They are separate from the custom fields on tracking lists.

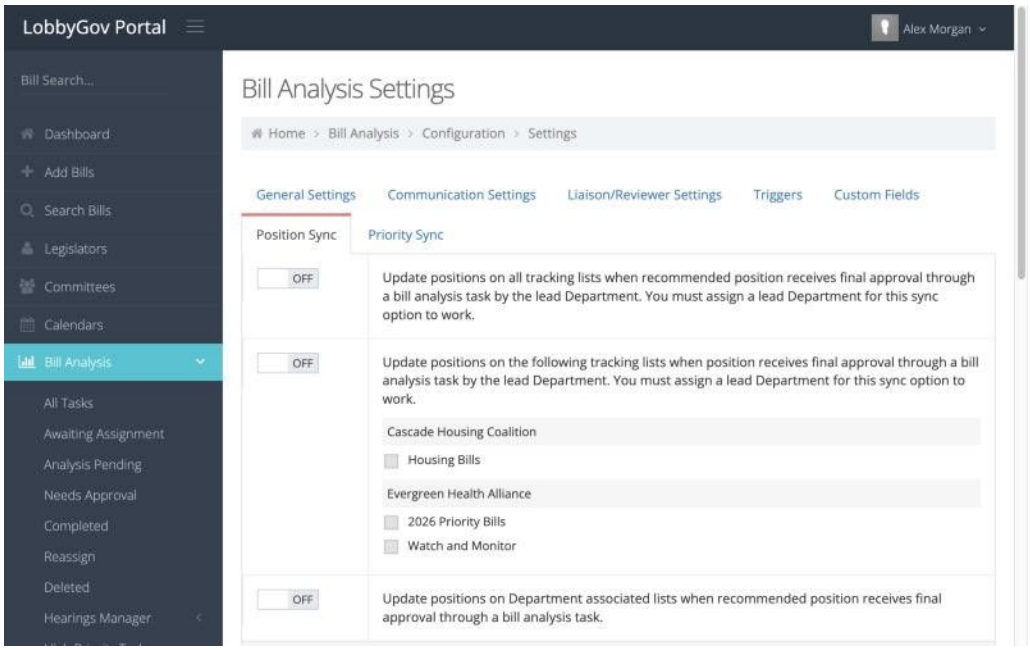
Position Sync and Priority Sync: copy approved recommendations to tracking lists

Applies to: Enterprise accounts

When a bill analysis receives final approval, Position Sync can copy the recommended position onto your tracking lists, so the lists and reports always show the position your organization approved. Priority Sync does the same for the recommended priority.

Open the sync settings

1. In the left menu, open **Bill Analysis**, then **Configuration**, then **Settings**.
2. Click the **Position Sync** tab (or **Priority Sync**).



The three options

Option	What it does	Needs a lead department?
Update positions on **all tracking lists**	When the lead department's analysis gets final approval, the position is updated on every tracking list that contains the bill.	Yes
Update positions on **the following tracking lists**	The same, but only on the lists you tick.	Yes
Update positions on **Department associated lists**	When any department's analysis gets final approval, the position is updated on that department's associated list.	No

Switch on the option you want and click **Save**. The Priority Sync tab has the same three options for priorities.

Sync Now

Syncing happens from then on as analyses are approved. Click **Sync Now** to apply the rule to analyses that were already approved. The tab shows when it was last synced.

Before you start

- For the first two options, turn on **Track Lead Departments** under General Settings and choose a lead department on each task. Without a lead department, nothing is synced.
- For the third option, give each department an **Associated List** under **Configuration**, then **Departments**.

- Sync updates the position or priority of bills already on a list. To add bills to a list automatically, use Triggers.

Hearings Manager: assign legislative hearings as tasks

Applies to: Enterprise accounts

Hearings Manager lets you ask a staff member to monitor a committee hearing and report back using a template you design.

Turn it on

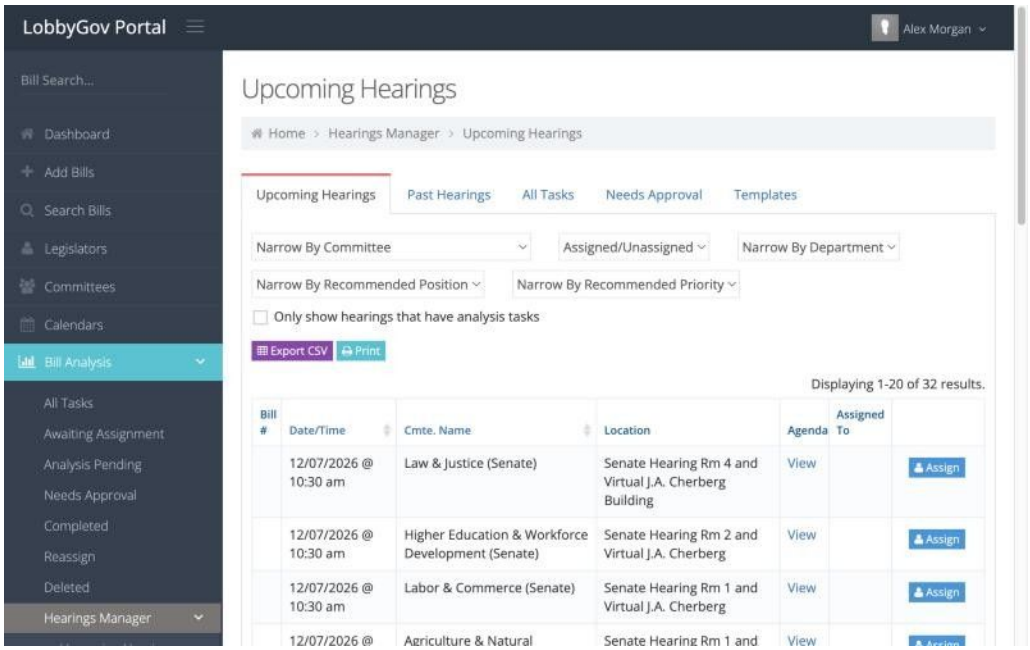
Open **Bill Analysis**, **Configuration**, **Settings**, **General Settings**, switch on **Enable Hearings Manager** and click **Save**. The **Hearings Manager** menu then shows Upcoming Hearings, Past Hearings, All Tasks, Needs Approval and Templates.

Create a hearing template

1. Open **Hearings Manager**, then **Templates**.
2. Click **Add New**, name the template and save.
3. Click **Customize** to build the form the reviewer will fill in.

Assign a hearing

1. Open **Hearings Manager**, then **Upcoming Hearings**.
2. Use the filters to find the hearing: committee, assigned or unassigned, department, recommended position or priority, or **Only show hearings that have analysis tasks**.
3. Click **Assign** on the hearing.
4. Choose the reviewer under **Select Reviewer**, the template under **Select Template** and the **Due Date/Time**.
5. Tick **Require Approval** if someone should approve the report.
6. Under **Select Specific Agenda Items**, tick the bills to cover, add any **Comments** and save.



Who can assign hearings

Enterprise Admins always can. Liaisons and approvers can if **Allow Liaisons to Assign Hearings** or **Allow Approvers to Assign Hearings** is on in the role settings.

Doing and approving the task

1. The reviewer opens **Hearing Tasks** in their menu and clicks **Review**.
2. If approval is required, the task appears under **Hearings Manager**, **Needs Approval**. The approver chooses **Mark as Complete & Submit Review as Final** or **Reject Analysis and Return to Reviewer**.

Email alerts

Under Communication Settings, **Hearing Manager Task Complete Alerts** and **Hearing Manager Task Change Alerts** choose who is emailed about hearing tasks.

Messages you may see

- "You must select a reviewer."
- "You must select a template."
- "You must select at least one agenda item."
- "Invalid Due Date/Time." The due date cannot be in the past.

Customizing Position and Priority Options for Bill Analysis

Applies to: Enterprise accounts

Reviewers and liaisons recommend a position (for example Support, Oppose, Neutral, Concerns) and a priority (for example High, Medium, Low, Monitoring) on each bill. You can change both the choices in those lists and what the two fields are called.

Change the choices in the lists

1. In the left menu, open **Account Settings**, then **Preferences**.
2. Find **Custom Positions** or **Custom Priorities**.
3. Click the add button to create a new option, or use **Edit** and **Delete** on an existing one.
4. Use the up and down arrows to set the order the options appear in.

The same positions and priorities are used on tracking lists and in Bill Analysis, so a change here shows up in both places.

Rename the fields

1. Open **Bill Analysis**, **Configuration**, **Settings**, **General Settings**.
2. Type your wording in **Custom Recommended Position Label** and **Custom Recommended Priority Label**, for example "Agency Position".
3. Click **Save**.

Decide who recommends them

On the role settings tab, switch these on or off for each role:

- **Ask Reviewers to Make Position Recommendations** and **Priority Recommendations**
- **Ask Liaisons to Make Bill Position Recommendations** and **Priority Recommendations**
- The same pair for approvers, in Approver Mode

A template can also hide the position or priority box for the work it covers.

Ask for an explanation

Turn on **Ask for position/priority recommendation explanation** under General Settings to add an Explanation box beside the recommendation.

What the recommendations drive

- **Approval is Only Needed When Reviewers Recommend These Positions/Priorities** can skip approval for routine recommendations.
- Triggers add bills to tracking lists based on the recommended position or priority.
- Position Sync and Priority Sync copy the approved recommendation onto tracking lists.

Switch Users: see LobbyGov Legacy as one of your users sees it

Applies to: Enterprise accounts

Switch Users lets you use the portal as another person in your account. It is the fastest way to help someone who says "I can't see that bill" or "the button is missing", because you see exactly what they see.

Who can switch

- Enterprise Admins can switch to any Bill Analysis user in the account.
- Liaisons can switch to their own reviewers.

Switch to a user

1. Click your name in the top-right corner and choose **Switch Users**.
2. Search for the person and click **Switch**.

A bar across the top of every page says "You are using LobbyGov as" followed by the person's name.

Switch back

Click **Click here** in the bar at the top to return to your own login.

Things to keep in mind

- While switched, anything you do is done as that user. If you complete a review, it is their review that is completed.
- Use it to check menus, lists and forms after you change role settings, hide pages or move someone to another department.
- You do not need the person's password, and their password does not change.

New bill versions and amendments: automatic tasks and the Assignment Queue

Applies to: Enterprise accounts

Bills change after you analyze them. LobbyGov can create a new analysis task automatically when a bill gets a new version or a proposed amendment, or hold the change in a queue so you decide what to do with it.

Choose how new versions are handled

1. Open **Bill Analysis**, **Configuration**, **Settings**, **General Settings**.
2. Set the options below and click **Save**.

Setting	Result
Automatically Create Separate Tasks for New Bill Versions on	A new task is created for each new version of a bill you are analyzing, with no action from you.
Place New Bill Versions in Assignment Queue on (and automatic tasks off)	New versions wait in **Assignment Queue** until someone assigns or dismisses them.
Both off	Nothing happens when a new version appears. Add it for analysis yourself if you need to.
Automatically Import Prior Bill Analyses on Task Creation on	The earlier version's analysis is carried into the new task, so reviewers update it and do not start again.

Proposed amendments have the same three settings: **Automatically Create New Tasks for Proposed Amendments**, **Place New Bill Amendments in Assignment Queue** and **Automatically Import Prior Bill Analyses on Amendment Task Creation**.

Work the Assignment Queue

1. In the left menu, open **Bill Analysis**, then **Assignment Queue**. The menu item appears only when one of the queue settings is on. Reviewers do not see it.
2. For each new version or amendment, choose **Assign** to create a task, or **Dismiss** if no new analysis is needed.

The **Already Added** tab shows what was assigned and the **Dismissed** tab shows what was dismissed, so nothing is lost.

Which setting should we use?

- Use automatic tasks if every new version must be analyzed.
- Use the queue if someone should decide case by case. It avoids flooding reviewers with small changes.

Dashboard panels and custom views have a filter, **Only Show the Most Recent Bill Version**, to keep older versions out of the way.

How Bill Analysis and Bill Tracking work together

Applies to: Enterprise accounts

Bill tracking and bill analysis are two halves of the same job. Tracking lists hold the bills your organization follows and its official position on each. Bill analysis is how your departments work out what that position should be.

The difference

	Bill Tracking	Bill Analysis
What it holds	Bills on tracking lists, with a position, priority, notes and categories	Tasks assigned to departments, with reviewers' answers and recommendations
Who uses it	Regular users, typically your government affairs team	Liaisons, reviewers and approvers in your departments
Output	Reports, vote cards, email alerts	An approved analysis with a recommended position and priority

Four ways to connect them

1. Add to Tracking List

Every task has an **Add to Tracking List** button. Use it to put the bill on a list by hand.

2. Associated lists

Each department can have an **Associated List**, set under **Configuration**, **Departments**. It is the tracking list that belongs to that department.

3. Triggers

A trigger adds a bill to a tracking list automatically when the final analysis recommends a position or priority you chose, for example every bill opposed at high priority.

4. Position Sync and Priority Sync

When an analysis gets final approval, the recommended position and priority can be copied onto tracking lists, so reports show the approved position without retyping.

Starting analysis from a tracked bill

From a search result or a tracking list, use **BA Add** to send a bill for analysis. On the Dashboard, the **Bill Analysis** icon on a bill opens its analysis.

Watching without analysis

If **Allow Bills to be Watched Without Analysis Assignment** is on, you can flag a bill for a department to keep an eye on with no review required.

Identifying Upcoming Events for Bill Analysis Tasks

Applies to: Enterprise accounts

Upcoming Events shows the committee hearings and other scheduled events for bills that have analysis tasks, so you can make sure the analysis is finished before the bill is heard.

Open Upcoming Events

In the left menu, open **Bill Analysis**, then **Upcoming Events**. Enterprise Admins see events for all tasks. Reviewers have their own **Upcoming Events** item at the top of the menu, showing events for the bills assigned to them.

Use it to set priorities

- Compare the hearing date with the task's due date. If the hearing is sooner, open the task and use **Edit** to bring the due date forward.
- Check **Analysis Pending** for the same bill and use **Why is this pending?** to see who still has to finish.
- If you use Hearings Manager, **Upcoming Hearings** has a tick box, **Only show hearings that have analysis tasks**, and lets you assign someone to monitor the hearing.

Show events in dashboards and views

Dashboard Manager panels and Custom Views can include an **Upcoming Events** column and a **Hearing Scheduled** filter. A view filtered to tasks with a hearing scheduled is a handy "what is coming up" page for liaisons.

Hide the page from a role

If liaisons, approvers or reviewers do not need this page, hide it with the **Upcoming Events** switch in the hide pages section of the role settings tab.

Generating Bill Analysis Reports, PDFs and exports

Applies to: Enterprise accounts

There are several ways to get bill analysis out of LobbyGov, depending on whether you need one analysis, a list of tasks or a whole session.

One analysis as a PDF

On Analysis Pending, Needs Approval or Completed, click **Download PDF** on the task. The PDF contains the bill details, each reviewer's answers, the recommended position and priority and the liaison's final recommendation. Reviewers can also download a PDF of their own review.

A task list as a spreadsheet

Every task list (All Tasks, Awaiting Assignment, Analysis Pending, Needs Approval, Completed) has **Export CSV** and **Print**. Set the filters first (session, department, lead department, reviewer) and the export contains only what is on screen.

A custom table of exactly the columns you want

Build a custom view under **Bill Analysis**, **Configuration**, **Custom Views**. Choose columns such as bill number, status, recommended position, custom fields and answers to individual questions, add filters, and then use **Export CSV** on the view. Dashboard panels built in **Dashboard Manager** export to Excel.

A whole session as an archive

1. Open **Tools & Wizards**, then **BA Archive Tool**.
2. Click **Add New**, enter a **Short Description**, and choose the **Session** and the departments.
3. Wait for the email telling you it is ready, then click **Download**.

The archive is a zip file with one PDF for each bill analysis that has at least one finished review, plus an index file listing them.

Bill analysis report types under Reports

Open **Reports**, then **Generate**. If your account has bill analysis report types, choosing one adds extra options: pick the departments (and lead departments) to include, and filter by recommended position or priority, by answers to template questions, or by dropdown and checkbox custom fields. The report types available depend on your account. Contact LobbyGov support if you need one added.

Bill tracking reports that include positions

If you use Position Sync or Triggers, approved positions and priorities flow onto your tracking lists. You can then use **Reports**, **Generate** to produce the usual tracking reports with those positions.

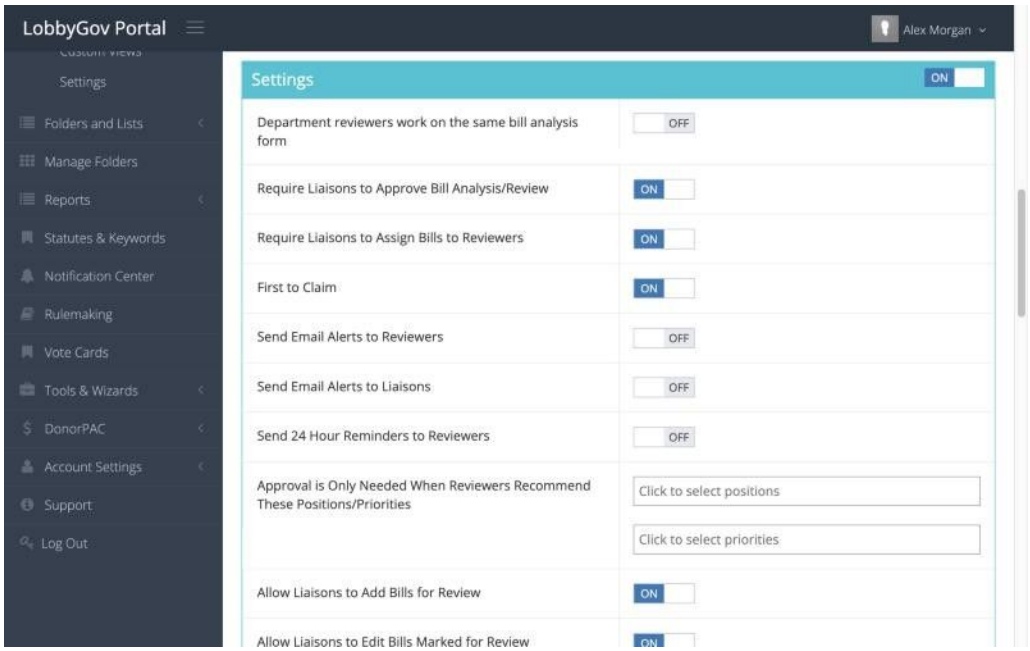
Use different Bill Analysis settings for one department

Applies to: Enterprise accounts

Account settings apply to every department. If one department works differently, for example it does not need liaison approval, or its reviewers should not see Search Bills, give it its own settings.

Turn on department settings

1. In the left menu, open **Bill Analysis**, then **Configuration**, then **Departments**.
2. Click **Details** on the department.
3. Scroll to the **Settings** panel and switch it **ON** with the switch in the panel's title bar. A message confirms "These settings will override account settings for this department."
4. Change the switches you need. Each change saves as you click.



What a department can override

- **Department reviewers work on the same bill analysis form** (shown when the account gives each reviewer a separate analysis)
- **Require Liaisons to Approve Bill Analysis/Review**
- **Require Liaisons to Assign Bills to Reviewers**
- **First to Claim**
- **Send Email Alerts to Reviewers**, **Send Email Alerts to Liaisons** and **Send 24 Hour Reminders to Reviewers**
- **Approval is Only Needed When Reviewers Recommend These Positions/Priorities**
- The liaison, approver and reviewer permissions: add, edit and delete bills, mark misassigned, mark No Organization Impact, recommend other departments, and make position and priority recommendations
- The hide pages switches for liaisons and reviewers

How overrides behave

- While the panel is **ON**, the department uses its own values for everything in the panel, and later changes to the account settings do not reach it.

- Switch the panel **OFF** and the department follows the account settings again.
- When you first switch the panel on, it starts as a copy of the account settings at that moment.

If an account setting seems to be ignored

This is the most common cause. For example, you turn on **Require Liaisons to Approve Bill Analysis/Review** for the account, but one department's reviews still go straight to Completed. Open that department's **Details** page: its Settings panel is on and still has approval switched off. Switch it on there, or switch the whole panel off.

Choose an Organization Bill Analysis Mode

Applies to: Enterprise accounts

Organization Bill Analysis Mode decides how many analysis forms are filled in for each bill. It is the first setting on **Bill Analysis**, **Configuration**, **Settings**, **General Settings**, and it shapes everything else.

The three modes

Mode	How it works	Good for
Separate analyses for each assigned reviewer	Every reviewer assigned to the bill answers the questions on their own form. The liaison sees all of them side by side and writes the final recommendation.	Organizations that want independent views from several subject experts.
Separate analyses for each assigned department or sub-department	All reviewers in a department work on one shared form for that department.	Departments that produce a single agreed analysis.
Organization reviewers all work on the same bill analysis	There is one form for the whole organization. A lead reviewer is chosen when the task is assigned, and only the lead reviewer can mark it complete.	Small teams that write one analysis together.

Change the mode

1. Open **Bill Analysis**, **Configuration**, **Settings**.
2. Under **Organization Bill Analysis Mode**, switch on the mode you want. Only one can be on.
3. Click **Save**.

Mixing modes

If the account uses a separate analysis for each reviewer, an individual department can still share one form. Open the department's **Details** page, switch its **Settings** panel on, and turn on **Department reviewers work on the same bill analysis form**.

Side effects to know about

- **First to Claim** only makes sense when reviewers have separate analyses. It is switched off for departments that share a form.
- **Send Alerts to Above Recipients When Each Reviewer Completes their Analysis** applies to the separate-per-reviewer mode.
- Choose the mode before you start a session. Changing it while tasks are in progress can confuse reviewers who have already started.

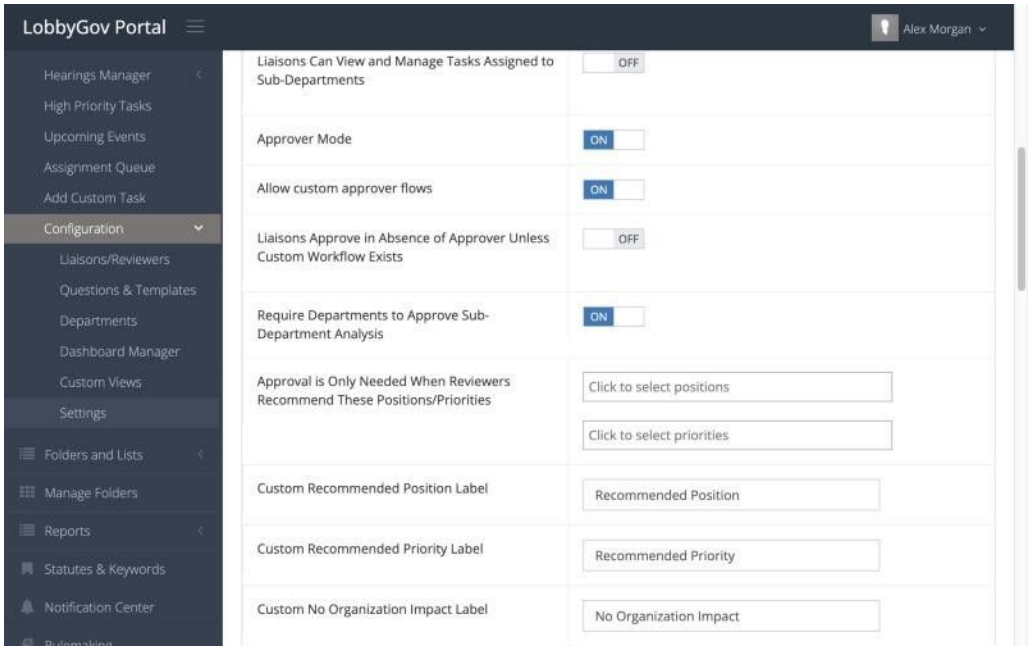
Approver Mode: add approval levels above the liaison

Applies to: Enterprise accounts

In the standard setup a reviewer completes the analysis and a liaison approves it. Approver Mode adds a third role, the approver, for organizations where a director or executive must sign off as well.

Turn Approver Mode on

1. Open **Bill Analysis**, **Configuration**, **Settings**, **General Settings**.
2. Switch on **Approver Mode** and click **Save**.



What changes

- The single **Needs Approval** stage becomes three: **Needs Liaison Approval**, **Needs Approval** (the approver's step) and **Needs Final Approval**.
- You can give users the **Approver** role in a department.

- The role settings tab becomes **Approver/Liaison/Reviewer Settings** and gains an Approver column.
- A **Workflows** tab appears, where you design approval routes and notifications.
- Communication Settings gain a separate "Review Needs Approval" subject and message for approvers.
- The liaison's button changes to **Approve & Send to Approver** or **Approve & Send to Next Approval Step**.

Two extra switches

Setting	What it does
Allow custom approver flows	When assigning a task, the liaison or admin can add approval steps just for that task.
Liaisons Approve in Absence of Approver Unless Custom Workflow Exists	If a department has no approvers, its liaisons carry out the approver step so tasks do not get stuck.

After turning it on

1. Give the right people the Approver role under **Configuration**, **Liaisons/Reviewers**.
2. Review the Approver column of the role settings.
3. Create at least one workflow, or mark one as default, on the **Workflows** tab.

Turning it off

Switch **Approver Mode** off and save. The three stages return to a single Needs Approval stage and the Workflows tab is hidden. Your workflows are kept in case you turn it on again.

Require liaison approval, or skip approval for routine recommendations

Applies to: Enterprise accounts

Two settings decide whether a finished review must be approved by a liaison before it counts as complete.

Require Liaisons to Approve Bill Analysis/Review

1. Open **Bill Analysis**, **Configuration**, **Settings**, **General Settings**.
2. Switch **Require Liaisons to Approve Bill Analysis/Review** on or off and click **Save**.

Setting	What happens when a reviewer finishes
On	The task moves to **Needs Approval**. A liaison reads it, adds the final recommendation and approves or rejects it.
Off	The task moves straight to **Completed**. The

Setting	What happens when a reviewer finishes
	reviewer's recommendation is final.

Approval only for certain positions or priorities

You may want a liaison to look only at the bills that matter most. Under **Approval is Only Needed When Reviewers Recommend These Positions/Priorities**:

- Leave both boxes empty and every review needs approval.
- Click **Click to select positions** or **Click to select priorities** and choose, for example, Oppose and High. Now only reviews recommending Oppose, or a High priority, wait for approval. Everything else is approved automatically.

Different rules for one department

Both settings can be overridden per department. Open **Configuration**, **Departments**, click **Details** and use the department's **Settings** panel.

Troubleshooting: a review skipped Needs Approval

Check these in order:

1. Is **Require Liaisons to Approve Bill Analysis/Review** on for the account?
2. Does the department have its own Settings panel switched on, with approval off? A department override wins over the account setting.
3. Are positions or priorities selected under "Approval is Only Needed When"? If the reviewer recommended something else, the review was approved automatically.

To send a completed task back, open **Completed** and click **Change to Not Complete**.

First to Claim: let the first available reviewer take a task

Applies to: Enterprise accounts

With First to Claim, you offer a task to several reviewers and the first one to claim it becomes responsible for the analysis. It suits a pool of analysts who share a workload.

How it works

1. A task is assigned to two or more reviewers with **First to Claim** switched on.
2. Each of them sees the task on their To-do List with a **Claim** button.
3. The first reviewer to click **Claim** confirms that they take responsibility for the analysis. The task is now theirs.
4. Anyone who clicks afterwards sees "This task has been claimed by other reviewer."

If email alerts are on, the other reviewers and the person who assigned the task are told who claimed it.

Make it the default

1. Open **Bill Analysis**, **Configuration**, **Settings**, **General Settings**.

2. Switch on **First to Claim** and click **Save**.

New assignments then start with First to Claim ticked. The person assigning can still untick it for a task where every reviewer should write their own analysis.

Use it on a single task

When adding a bill or using **Assign to Reviewers**, choose two or more reviewers and turn on **First to Claim** for that assignment.

Limits

- It needs at least two reviewers on the task.
- It is not available where reviewers share one analysis form.
- A department can have its own First to Claim default in its **Settings** panel.

Set default due dates for bill analysis

Applies to: Enterprise accounts

Every bill analysis task has a due date and time. Three settings fill it in automatically so the person adding the bill does not have to work it out.

Set the defaults

1. Open **Bill Analysis**, **Configuration**, **Settings**, **General Settings**.
2. Set the three options below and click **Save**.

Setting	What it does	Example
Default Days for Bill Review/Analysis	Days from the day the task is created to the due date. From 0 to 30.	5
Days Should Exclude Weekends	Counts working days only, so Saturdays and Sundays are skipped.	On
Default Due Date Time	The time of day on the due date.	5:00 pm

With the example values, a bill added on a Monday is due the following Monday at 5:00 pm.

Change the due date on one task

- When adding the bill, edit **Bill Review Due Date/Time**.
- When assigning reviewers, edit **Due Date** in the Assign window.
- Later, click **Edit** on the task.

Stop liaisons changing due dates

On the role settings tab, turn on **Do not allow liaisons to adjust the due date/time for task assignments**. Liaisons then keep the due date set when the bill was added.

Reminders tied to the due date

On Communication Settings, **Send 24 Hour Reminders to Reviewers** emails reviewers the day before, and **Send Late Review Reminders to Reviewers** emails them once a review is overdue.

Rename Department, Position, Priority and No Organization Impact

Applies to: Enterprise accounts

LobbyGov can use your organization's own vocabulary. If you say "Office" where LobbyGov says "Department", or "Agency Position" where it says "Recommended Position", change the labels once and they change everywhere.

Change the labels

1. Open **Bill Analysis**, **Configuration**, **Settings**, **General Settings**.
2. Edit the fields below and click **Save**.

Field	Standard wording	Where your wording appears
Department Name	Department	Menus, the Departments page, task lists, forms, filters and emails. Sub-departments follow it too.
Custom Recommended Position Label	Recommended Position	Review forms, the liaison's final recommendation and task list columns.
Custom Recommended Priority Label	Recommended Priority	The same places, for priority.
Custom No Organization Impact Label	No Organization Impact	The checkbox on review forms and the button on Awaiting Assignment. For example "No Agency Impact".
Custom Watch Bills Description	Watch Bills	The watch page in the Bill Analysis menu, when bill watching is on.

Good to know

- Type the singular form for Department Name. LobbyGov adds the plural where it needs one.
- Help center articles use the standard wording, so tell your users which words you changed.
- These labels rename the fields. To change the choices inside the position and priority lists, use **Account Settings**, **Preferences**, **Custom Positions** and **Custom Priorities**.

Watch bills without assigning them for analysis

Applies to: Enterprise accounts

Some bills are worth a department's attention but do not need a written analysis. Bill watching lets you flag a bill for a department with no review, no due date and no approval.

Turn bill watching on

1. Open **Bill Analysis**, **Configuration**, **Settings**, **General Settings**.
2. Switch on **Allow Bills to be Watched Without Analysis Assignment**.
3. Optionally type your own name for the page in **Custom Watch Bills Description**, for example "Monitor Only".
4. Click **Save**.

Watch a bill

1. Click **Add Bills** and enter the bill.
2. Tick the departments that should watch it.
3. Choose **Watch and Do Not Assign for Analysis** and submit.

If email alerts are on, the department's liaisons receive a "New Watch Bill" email.

See watched bills

Open **Bill Analysis** and click the watch page (called **Watch Bills** unless you renamed it). From there you can edit or remove a watched bill and see its history.

Watched bills in dashboards and views

Dashboard Manager panels and Custom Views have a **Bill (Watch)** filter, so you can build a page that shows only watched bills, or leaves them out.

Watching compared with the Watch List

This feature belongs to Bill Analysis and is about a department's attention. The **Watch List** under Folders and Lists is a personal bill tracking list and works separately.

Hide pages from liaisons, approvers and reviewers

Applies to: Enterprise accounts

Department staff often need only their task list. You can remove pages they do not use from their left menu so the portal is simpler for them.

Pages you can hide

Page	Liaisons	Approvers	Reviewers
Upcoming Events	Yes	Yes	Yes
Search Bills	Yes	Yes	Yes

Page	Liaisons	Approvers	Reviewers
Legislators	Yes	Yes	Yes
Committees	Yes	Yes	Yes
Reports	Yes	Yes	Not offered
Tools & Wizards	Yes	Yes	Yes

Hide pages for the whole account

1. Open **Bill Analysis**, **Configuration**, **Settings**.
2. Click the **Liaison/Reviewer Settings** tab (**Approver/Liaison/Reviewer Settings** in Approver Mode).
3. Scroll to the bottom of each role's column and tick the pages to hide.
4. Click **Save**.

Hide pages for one department only

1. Open **Configuration**, **Departments** and click **Details** on the department.
2. Switch the **Settings** panel on.
3. Use the switches such as **Hide Search Bills from Reviewers** or **Hide Reports from Liaisons**.

Check the result

Use **Switch Users** (click your name, top right) to view the portal as one of the affected users and confirm the menu looks right.

Good to know

- Enterprise Admins always see every page.
- People who also have regular user permissions keep their bill tracking pages.
- To show or hide the **All Tasks** page, use **Show All Tasks Page to All Bill Analysis Users** under General Settings.

Dashboard Manager: build custom dashboard panels for Bill Analysis users

Applies to: Enterprise accounts

Dashboard Manager lets Enterprise Admins design the panels that liaisons, approvers and reviewers see on their Dashboard. Each panel is a table of bill analysis tasks with the columns and filters you choose.

Create a panel

1. In the left menu, open **Bill Analysis**, then **Configuration**, then **Dashboard Manager**.
2. Click **Add New** and enter a **Short Description**. This is the panel's title.

3. Choose whose answers to show: **Display all answers regardless of Department**, or **Display only answers from reviewers within the selected Departments**.
4. Choose the columns and save.

A new panel starts hidden. Click **Currently Hidden** to change it to **Currently Displaying**.

Columns you can use

- **General**: Bill #, Companion Bill #, Abbrev. Title, Status, Sponsor, Created Date, Due Date, Stage, recommended position and priority, Lead and Other Departments, Assigned Templates, Assigned Reviewers, Summary, Upcoming Events.
- **Buttons**: BA, Tracking, Add to Tracking List, Legislature Page Link.
- Your Bill Analysis **custom fields**.
- Fields from each active **template**, and individual **analysis questions**, so answers appear right in the table.

Click the gear icon in the **Columns** box to add or remove columns. Drag rows to change their order.

Filters

Under **Filters**, add one or more rows of field, operator and value, joined with AND or OR, then click **Save**. Filters include Any Task, Assigned Templates (Lead or Non-Lead), Bill (Watch), Hearing Scheduled, Lead Department, Other/Non-Lead Department, Recommended Position, Recommended Priority, Stage, Bill (Tracking list), Bill (Category) and **Only Show the Most Recent Bill Version**.

Choose who sees the panel

- Under **Users**, tick **Enterprise Administrators**, **Liaisons**, **Reviewers** and, in Approver Mode, **Approvers**.
- Under **Departments**, tick **All Departments** or specific ones.

A person sees the panel if their role is ticked and their department matches. Ticks save as you click.

Other buttons

- **Preview**: opens the panel in a new tab.
- **Delete**: removes the panel.
- Click the panel's name to rename it.

What users see

The panel appears on the Dashboard with a session filter, a bill search, Narrow By filters, **Export** (an Excel file) and **Print**. For Bill Analysis users without regular user permissions, shared panels are the whole Dashboard.

For a full page under the Bill Analysis menu, and one you can publish with a link, use Custom Views.

Custom Views: build and publish your own Bill Analysis pages

Applies to: Enterprise accounts

A custom view is a full-page table of bill analysis tasks that appears as its own item in the **Bill Analysis** menu, for example "High Priority Tasks". You choose the columns, the filters and who can see it. You can also publish a view so people outside LobbyGov can see it.

Create a view

1. In the left menu, open **Bill Analysis**, then **Configuration**, then **Custom Views**.
2. Click **Add New** and enter the name. It becomes the menu item.
3. Choose the columns and save.
4. Click **Currently Hidden** so it reads **Currently Displaying**.

Columns and filters

Custom Views work the same way as Dashboard Manager. Click the gear icon in the **Columns** box to pick columns: general bill and task details, action buttons, your custom fields, template fields and individual analysis questions. A **Short Title** column is also available. Drag rows to reorder them.

Under **Filters**, combine conditions such as Stage, Recommended Position, Recommended Priority, Lead Department, Hearing Scheduled, Bill (Tracking list), Bill (Category) and **Only Show the Most Recent Bill Version**, then click **Save**.

Choose who sees it

Tick the roles under **Users** (Enterprise Administrators, Liaisons, Reviewers, and Approvers in Approver Mode) and the departments under **Departments**. A person sees the view if their role is ticked and their department matches.

What users see

The view has a session filter, a search box, Narrow By filters, a filter by assigned reviewers, **Export CSV** and **Print**.

Publish a view

1. Click **Publish** on the view.
2. Copy the **URL for Sharing**, or the **Code for embedding** to place the view on your own website or intranet.

Before you publish, keep in mind:

- Anyone with the link can see the view without signing in, and can download it as CSV.
- The view shows data as your account's primary user sees it.
- Only include columns you are happy to share. Leave out internal analysis answers if the audience is public.
- To stop sharing, switch publishing off. The link stops working.

BA Archive Tool: download a session's bill analyses

Applies to: Enterprise accounts

The Bill Analysis Archive Tool packages a whole session's analyses into one download. Use it at the end of session for your records, or to answer a records request.

Request an archive

1. In the left menu, open **Tools & Wizards**, then **BA Archive Tool**.
2. Click **Add New**.
3. Enter a **Short Description** so you can recognize the request later.
4. Choose the **Session**. You can pick the whole session or one part of it, such as a special session or one half of the biennium.
5. Choose all departments or specific ones, and save.

Wait for it to be built

The request shows as **Pending** while the archive is built. This can take from a few minutes to an hour or more for a busy session. LobbyGov emails you when it is ready, and a **Download** button appears next to the request.

What is in the archive

- A zip file with one PDF for each bill analysis that has at least one finished review.
- An index file (index.csv) listing the analyses.
- If you chose particular departments, each PDF holds only those departments' reviews.
- If you chose one part of a session, the archive holds the analyses whose tasks were created during that part.

Statuses

Status	Meaning
Pending	Still being built.
Complete	Ready. Click **Download**.
Not Available	Nothing matched the session and departments you chose.
Failed	The archive could not be built. Contact LobbyGov support.

Use **Delete** to remove a request you no longer need.

Set the internal support contacts shown to Bill Analysis users

Applies to: Enterprise accounts

When a liaison or reviewer needs help, the best person to ask is usually someone in your own organization: the office that runs bill analysis. You can show that office's contact details inside LobbyGov.

Enter the contacts

1. Open **Bill Analysis**, **Configuration**, **Settings**, **General Settings**.
2. Scroll to the bottom of the tab and fill in the fields below.
3. Click **Save**.

Field	Use it for
Responsible Office/Dept. Name	The office that oversees your LobbyGov account, for example "Office of Government Relations".
General Contact Name, **Email**, **Phone**	Who to ask about assignments, deadlines and process.
Tech Contact Name, **Email**, **Phone**	Who to ask about logins and technical problems.

Where users see them

Bill Analysis users see these details in the support information window, with a line saying which office oversees your LobbyGov account. Regular questions then go to your team first.

Tips

- Use a shared mailbox, not one person's address, so the details stay right when staff change.
- Each department also has its own contact name, phone and email under **Configuration**, **Departments**.

User Groups for Bill Analysis

Applies to: Enterprise accounts

A user group is a named set of people that cuts across departments, such as "Policy Directors" or "Fiscal Analysts". Groups make it easy to find people and to route approvals and notifications to the right ones.

Create a group

1. In the left menu, open **Bill Analysis**, then **Configuration**, then **Liaisons/Reviewers**.
2. Click the **User Groups** tab.
3. Click **Add New**, type the name and click **Save**.

Add people to a group

- On the User Groups tab, click **Manage Group Members** on the group.
- Or, on the Liaisons/Reviewers tab, tick several users, choose **Assign selected users to** the group in the bulk action list and click **Apply**.
- Or edit one user and tick the group under **Groups**.

Groups can include every user type in your Enterprise account.

Where groups are used

- **Workflows** (Approver Mode): send an approval step, or a notification, to the approvers or liaisons in a department who belong to a group. For example, fiscal bills go to the Fiscal Analysts group for approval.
- **Liaisons/Reviewers**: filter the user list with **Narrow By User Group**.

Manage groups

- **Active**: click to make a group inactive.
- **Edit Name**: rename it.
- **Delete**: remove the group. The users themselves are not deleted.

Frequently Asked Questions

LobbyGov Legacy sign-in and account troubleshooting

Find the message you see below for what it means and what to do.

Signing in

Message	What to do
Incorrect username or password.	Check that you entered your username, not your email address. If you've forgotten either, use the links on the login page.
Your account has been temporarily locked due to too many failed login attempts. Please try again after 15 minutes.	Wait 15 minutes, or ask your account's super user to click **Unlock User** for you on Subusers & Sharing.
Your email address hasn't been verified!	Click the link in the message to get a new "Please Verify Your Email Address" email, then click the link in that email.
Your user account is inactive.	Your login has been switched off. Ask your account's super user, or contact LobbyGov support.
We couldn't find an active account associated with your username…	None of the organizations your login belongs to has an active subscription. Contact your organization's LobbyGov contact.
Your account is temporarily offline. Please ask the primary account holder to contact us.	Your organization's account is locked because of an unpaid balance. A billing user can fix it under **Account Settings > Account Details**.
This user can only login with SAML	Click **SAML Login** on the login page instead of entering a password.
This code is invalid	Verification codes expire quickly. Open the Authy app for a fresh code, or click **request via SMS**.

Links in emails

Message	What to do
Invalid or expired Key!	Password reset links last 24 hours and work once. Request a new one from the login page.
The invitation is invalid or expired.	Invitations last 7 days. Ask the person who

Message	What to do
	invited you to click **Resend Invite**.

Passwords

My new password is rejected. Passwords must be 7 to 20 characters. If your organization uses advanced password security, the minimum is 10 characters, with a number, upper- and lower-case letters and a special character.

Missing features

A menu item described in the help center isn't in my menu. What you see depends on your account's plan, the states it covers, and the permissions your super user gave you. Ask your super user to check your **Permissions** on Subusers & Sharing.

A bill I added isn't on my tracking list. Check the session filter at the top of the list. It may be set to a different session or half of the biennium.

I can't create another tracking list or invite another user. Your plan sets a limit on active lists and on users. Archive a list or remove a user, or contact LobbyGov about your plan.

Still stuck?

Email support@lobbygov.com or submit a request.

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