

Utilizing the Search Function

Introduction

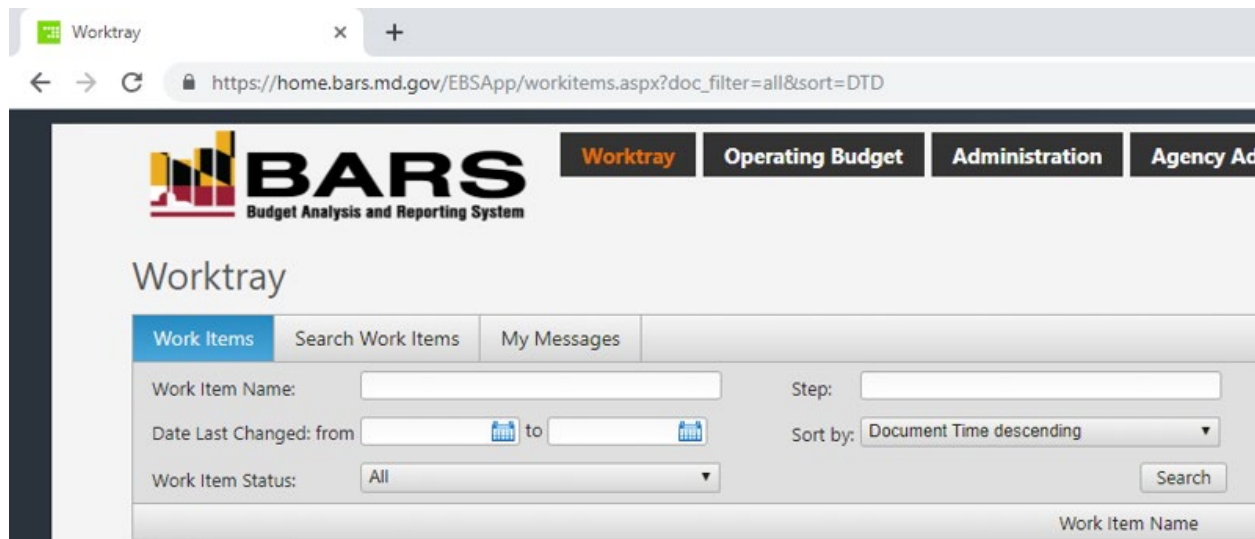
The Search function in the Worktray page of BARS is an indispensable feature that allows users to find adjustments quickly and easily, even if there are thousands of adjustments created for a specific agency. This guide describes different uses of the Work Items Tab and the Search Work Items Tab search bars within the Worktray page. Users should utilize the Work Items Tab as the primary search tool to find the most up-to-date versions of individual adjustments that are available to the specific user, whereas the Search Work Items Tab is used to find all historic versions of past and current Stages for individual adjustments as well as hyperlinks to access “Read Only” versions of adjustments without claiming them.

Step 1:

Log into BARS Production

Step 2:

Navigate to the **BARS** Homepage/Worktray, by clicking the **Worktray** button at the top left of the screen.



The screenshot shows a web browser window with the URL https://home.bars.md.gov/EBSApp/workitems.aspx?doc_filter=all&sort=DTD. The page header includes the BARS logo (Budget Analysis and Reporting System) and navigation tabs for Worktray, Operating Budget, Administration, and Agency Ad. The main content area is titled "Worktray" and features three tabs: Work Items, Search Work Items, and My Messages. The "Work Items" tab is active, displaying search filters: "Work Item Name" (text input), "Date Last Changed" (range selector with calendar icons), "Work Item Status" (dropdown menu set to "All"), "Step" (text input), and "Sort by" (dropdown menu set to "Document Time descending"). A "Search" button is located at the bottom right of the filter section. Below the filters, a table header is partially visible with the text "Work Item Name".

Step 3:

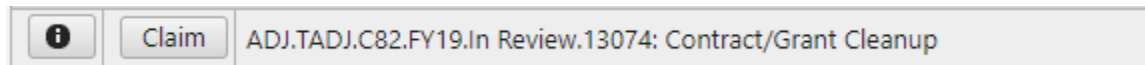
On the Worktray page, the user will find a variety of available features, as well as the Work Items Tab and Search Work Items Tab where search parameters may be entered:

Work items: displays those items that you currently have claimed and all adjustments that are available to you.

Search: allows you to search items from the Worktray.

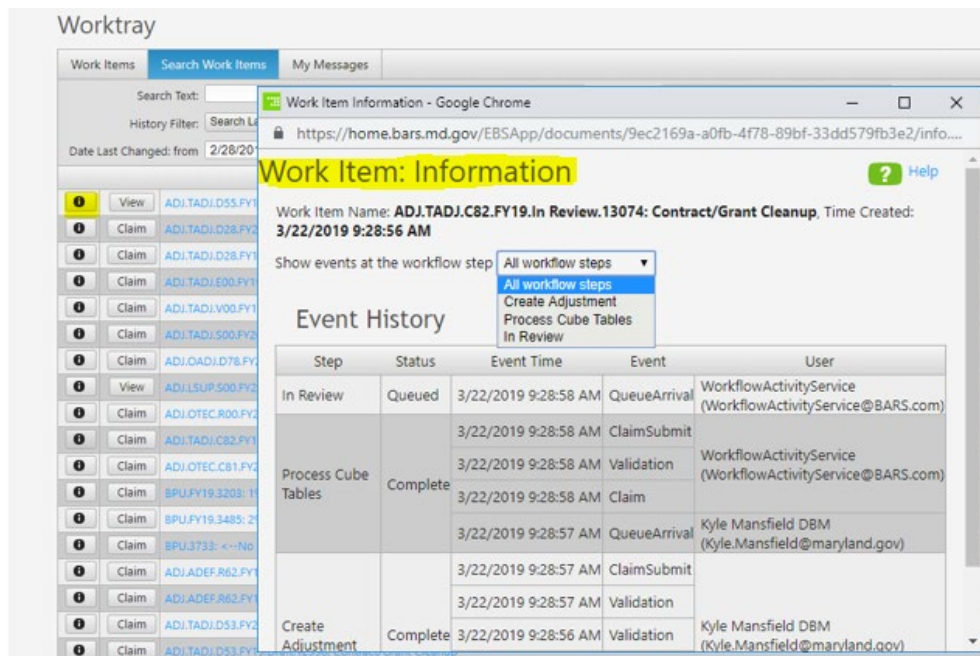
List of Available Work Items: shows all work items that are available to you, the user. These can be “Claim” meaning the user may take this adjustment and submit it to another Stage or Status, “Open” if the adjustment is open or has been saved and may be continued and completed the same user, or “View” if the adjustment is only in “Read Only” mode and in-use by another user.

Work Item Name: Includes a name granted by the creator of the adjustment and specific data that is uniquely identifiable to that adjustment. BARS automatically creates a portion of each Work Item’s name in the Worktray. This consists of several parts, as shown in the example below:



- **ADJ:** The type of Work Item (Adjustment)
- **TADJ:** The type of Adjustment (Technical Adjustment)
- **C82:** The Agency Code
- **FY19:** The Fiscal Year
- **In Review:** The Status of the Work Item
- **13074:** The unique ID for the Work Item
- **“Contract/Grant Cleanup”:** The name given by a user

Information Icon: Brings up a window that displays “Work Item: Information” about the process of a particular adjustment.



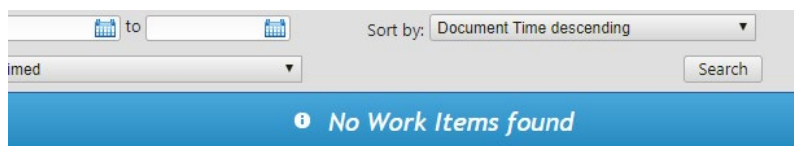
Step	Status	Event Time	Event	User
In Review	Queued	3/22/2019 9:28:58 AM	QueueArrival	WorkflowActivityService (WorkflowActivityService@BARS.com)
Process Cube Tables	Complete	3/22/2019 9:28:58 AM	ClaimSubmit	WorkflowActivityService (WorkflowActivityService@BARS.com)
		3/22/2019 9:28:58 AM	Validation	WorkflowActivityService (WorkflowActivityService@BARS.com)
		3/22/2019 9:28:58 AM	Claim	
Create Adjustment	Complete	3/22/2019 9:28:57 AM	QueueArrival	Kyle Mansfield DBM (Kyle.Mansfield@maryland.gov)
		3/22/2019 9:28:57 AM	ClaimSubmit	
Create Adjustment	Complete	3/22/2019 9:28:57 AM	Validation	
		3/22/2019 9:28:56 AM	Validation	Kyle Mansfield DBM (Kyle.Mansfield@maryland.gov)

Work Items Tab

From the Work Items Tab of the Worktray page, users will find the “Work Item Name”, “Step”, “Date Last Changed: from & to”, “Sort by”, and “Work Item Status.” Each of these selectors can be used to narrow down the existing Worktray into a specific subset of adjustments.

1. **Work Item Name:** Provides the ability to search for specific text within the adjustment Name, including any of the above Worktray item codes. This is an *extremely* powerful tool that allows the user to choose multiple strings of characters to search from. For example:
 - “AADJ”: brings up all “Agency Adjustment” work items that are available to the user.
 - “C82”: brings up all adjustments and work items for agency C82 within the set parameters.
 - “AACT C82”: brings up all C82 Agency Actuals adjustments within the set parameters.
 - “Contract”: brings up all adjustments with “Contract” in the title of the adjustment that are available to the user.
 - “FY20”: brings up all adjustments against FY 2020 within the set parameters.
 - “C82 AACT FY18 Contract”: brings up all C82 Agency Actuals adjustments for FY 2018 that include the word “Contract” in the title.
2. **Step:** Provides the ability to search for adjustments with a specific Step; e.g., searching “Draft” will find all adjustments at *Draft*, while searching “Review” will find all adjustments at both *In Review* and *Reviewed* steps.
3. **Date Last Changed:** Provides the ability to search for adjustments within a specific date range.
4. **Sort by:** Provides the ability to narrow down search results according to “Document Time”, “WorkItem Name”, and “Step Name.”
5. **Work Item Status:** Provides the ability to search for adjustments by Status, specifically “Claimed”, “Available”, and “Read Only.”

*Note: Occasionally, the user might see an empty Worktray when there should be content. If the user sees this (similar to the following screenshot), it can be fixed by clicking the **Worktray** button at the top of the screen.*



Search Work Items Tab

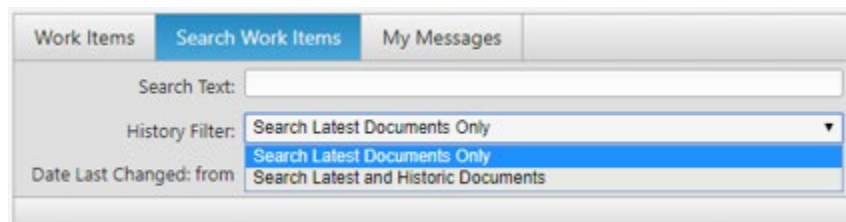
From the Search Work Items Tab of the Worktray page, users will find the “Search Text”, “Status”, “History Filter”, “Sort by”, and “Date Last Changed: from & to.” Adjustments within this tab will be highlighted in [blue](#) to indicate that they are hyperlinked to individual adjustments. Users may click on these hyperlinks in lieu of clicking “Claim” or “View” in order to view a Read Only view of the adjustment. Users may export grids from these Read Only views of adjustments, but certain features, such as grid loading buttons, will not be available.

Again, each of these selectors can be used to narrow down all available historical adjustments into a specific subset of adjustments.

1. **Search Text:** Provides the ability to search for specific text. This is also a very powerful tool, but works slightly different from the search bar of the Work Items Tab. The “Search

Text” field allows users to search for text *within* the text fields of specific adjustments (such as the Description field of an adjustment’s Overview Tab) rather than just the title of the adjustment. These text searches can be combined with the character string search guidance shown above for the “Work Item Name” field.

2. **Status:** Provides the ability to search for adjustments with a specific Status.
3. **History Filter:** Provides the ability to choose from “Search Latest Documents Only”, which brings up the most recent iteration of the individual adjustment, or “Search Latest and Historic Documents”, which allows the user to see all iterations of the adjustment for which the user has the authority to see.



The screenshot shows a web interface with three tabs: "Work Items", "Search Work Items" (which is active), and "My Messages". Below the tabs, there is a "Search Text:" input field. Underneath that is a "History Filter:" dropdown menu with three options: "Search Latest Documents Only" (selected), "Search Latest Documents Only", and "Search Latest and Historic Documents". Below the dropdown is a "Date Last Changed: from" input field.

4. **Sort by:** Provides the ability to choose from “Last Changed ascending” and “Last Changed descending” as a method to sort search results chronologically.
5. **Date Last Changed:** Provides the ability to search for adjustments within a specific date.

Reconfirm Your Dates: If you are having trouble finding a specific adjustment that you believe you should be seeing, make sure to reconfirm the dates are correct. In the Search Work Items Tab, the systems will automatically set the date range to the last 30 days.

Step 4:

Once the parameters have been set, press the “Search” button within the given Worktray tab.