

Using Reports - 3 Year Agency Summary Report


Introduction:

The 3 Year Agency Summary report provides a holistic view of an agency's budget, including Positions, Expenditures, and Funds. This detail may be filtered by Adjustment Status to produce individual reports for different levels of adjustment approval (e.g., Draft, Released, etc...), and users may filter down to the individual Unit or Program level to identify funding levels within agency subdivisions. This report is useful by also showing differences across fiscal years.

Step 1:

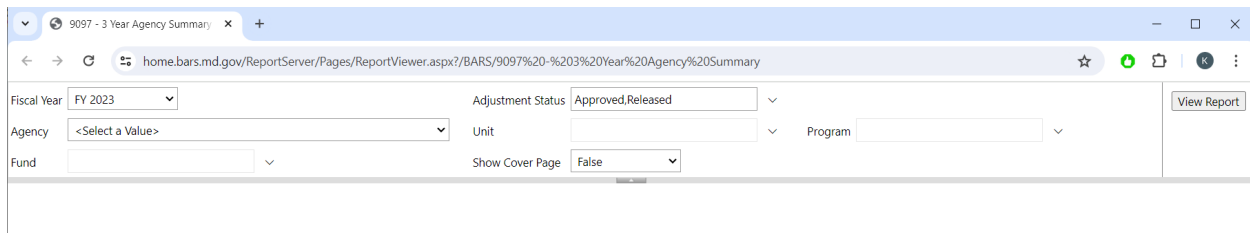
Log into BARS Production

Step 2:

From the **BARS** Homepage/Worktray, select the **Reports** button at the top of the page. In the **Reports** page, click on the expand icon  for "Operational Reports" and select **3 Year Agency Summary**. Users may be required to input their log-in information again in order to access the report.

Step 3:

Users accessing this report will see the following data selectors to create a custom report:



The screenshot shows a web browser window with the URL `home.bars.md.gov/ReportServer/Pages/ReportViewer.aspx?/BARS/9097%20-%203%20Year%20Agency%20Summary`. The interface includes several data selectors:

- Fiscal Year:** A dropdown menu currently set to "FY 2023".
- Adjustment Status:** A dropdown menu currently set to "Approved,Released".
- Agency:** A dropdown menu currently set to "<Select a Value>".
- Unit:** A dropdown menu currently set to "<Select a Value>".
- Program:** A dropdown menu currently set to "<Select a Value>".
- Fund:** A dropdown menu currently set to "<Select a Value>".
- Show Cover Page:** A dropdown menu currently set to "False".
- View Report:** A button located to the right of the selectors.

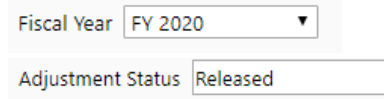
From this screen, users have access to run the 3 Year Agency Summary report from a variety of stages and statuses available to the specific user.

Note: All of the above data selectors must be used in order to create a report successfully.

Step 4:

For the purpose of observing the FY 2020 Governors Allowance, agencies should select the following:

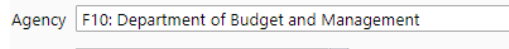
Select "FY 2020" in **Fiscal Year**.



The screenshot shows the "Fiscal Year" dropdown menu set to "FY 2020" and the "Adjustment Status" dropdown menu set to "Released".

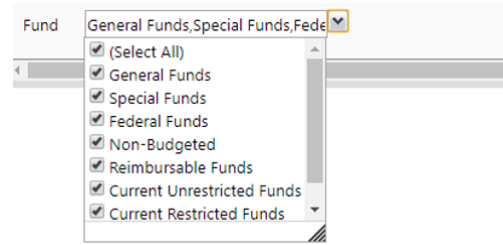
Select "Released" in **Adjustment Status**.

Select your desired **Agency**.



The screenshot shows the "Agency" dropdown menu set to "F10: Department of Budget and Management".

Confirm that all Fund types are checked (fund types not included in the budget will not be shown)



Upon selecting your **Agency**, the **Unit** and **Program** selectors will autofill and autoselect each subdivision within the agency. These may be checked on or off to exclude certain pieces of the agency as desired.

Step 5:
Click on **View Report**. Users will see the following screen:

Fiscal Year: Adjustment Status:

Agency: Unit: Program:

Fund: Show Cover Page:

Navigation:

3 Year Agency Summary Report
Agency : F10 - Department of Budget and Management
Fund : [GF,SF,FF,NB,RF,CUR,CR,FFA]


	2018 - Actuals			2019 - Current			2020 - Budget				
	FMIS	Agency Actuals	Budget Book Actuals	Leg. Appr	Agency Working	Working Additional	Budget Book Working	Target	Agency Request	OTTR/RED	Allowance
Positions											
Number of Authorized Positions			332.00				334.00				322.00
Number of Contractual Positions			34.31				32.00				33.00
Expenditure											
00 Unallocated			-				-				-
01 Salaries, Wages and Fringe Benefits			29,294,843				35,196,401				261,288,940
02 Technical and Special Fees			1,236,157				1,162,688				1,264,281
03 Communications			2,122,565				1,478,859				1,763,200
04 Travel			34,548				75,250				87,250
06 Fuel and Utilities			502				-				-
07 Motor Vehicle Operation and Maintenance			8,183				11,700				11,855
08 Contractual Services			7,613,797				13,143,289				17,479,473
09 Supplies and Materials			182,302				180,000				195,000
10 Equipment - Replacement			239,754				160,000				195,000
12 Grants, Subsidies, and Contributions			-				-				8,000,000
13 Fixed Charges			747,229				815,192				850,009
Total Expenditure			41,479,880				52,223,379				291,155,008
Funds											
General Funds			17,170,631				21,298,392				205,837,829
Special Funds			15,229,409				16,104,252				51,925,993
Parliamentary Funds			-				222,735				16,212,286

The resulting report shows data filtered for the specific Status that was selected in the data selector portion of the Reports screen. The report will show final data for each stage from the agency budget process, with the gray Stages columns indicating data corresponding directly to the FY 2018, FY 2019, and FY 2020 columns Budget Book pages.

Using this report, agencies have access to Positions, Expenditures, and Fund detail. Positions contains PINs (“Number of Authorized Positions”) and Contractual positions and can be expanded

to show PINs by class code within each Program. Expenditures displays individual Objects, and can be expanded to show the sums for each Comptroller Subobject agency-wide. Funds displays Total Funds by fund type, and can be expanded to show individual fund sources as submitted for each Stage.

Step 6:

Users may export the report to Excel, PDF, and a variety of different file formats to download and file the information provided by clicking on the  icon.