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:

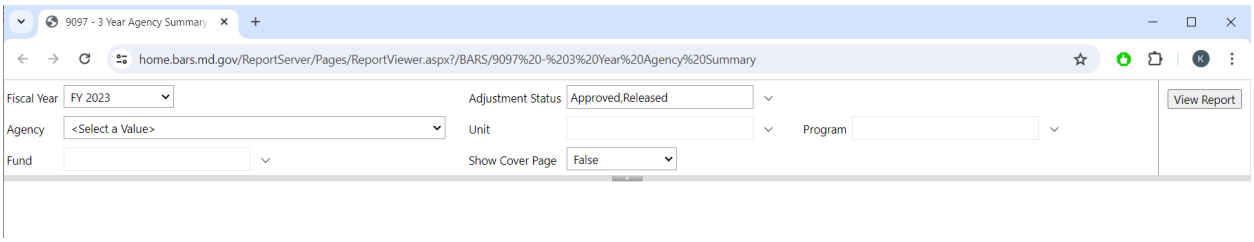
Log into BARS Production

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:



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.

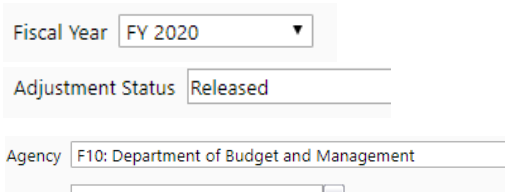
Step 4:

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

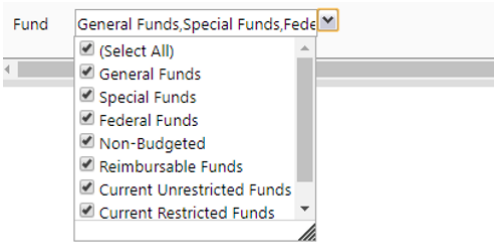
Select "FY 2020" in **Fiscal Year**.

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

Select your desired **Agency**.



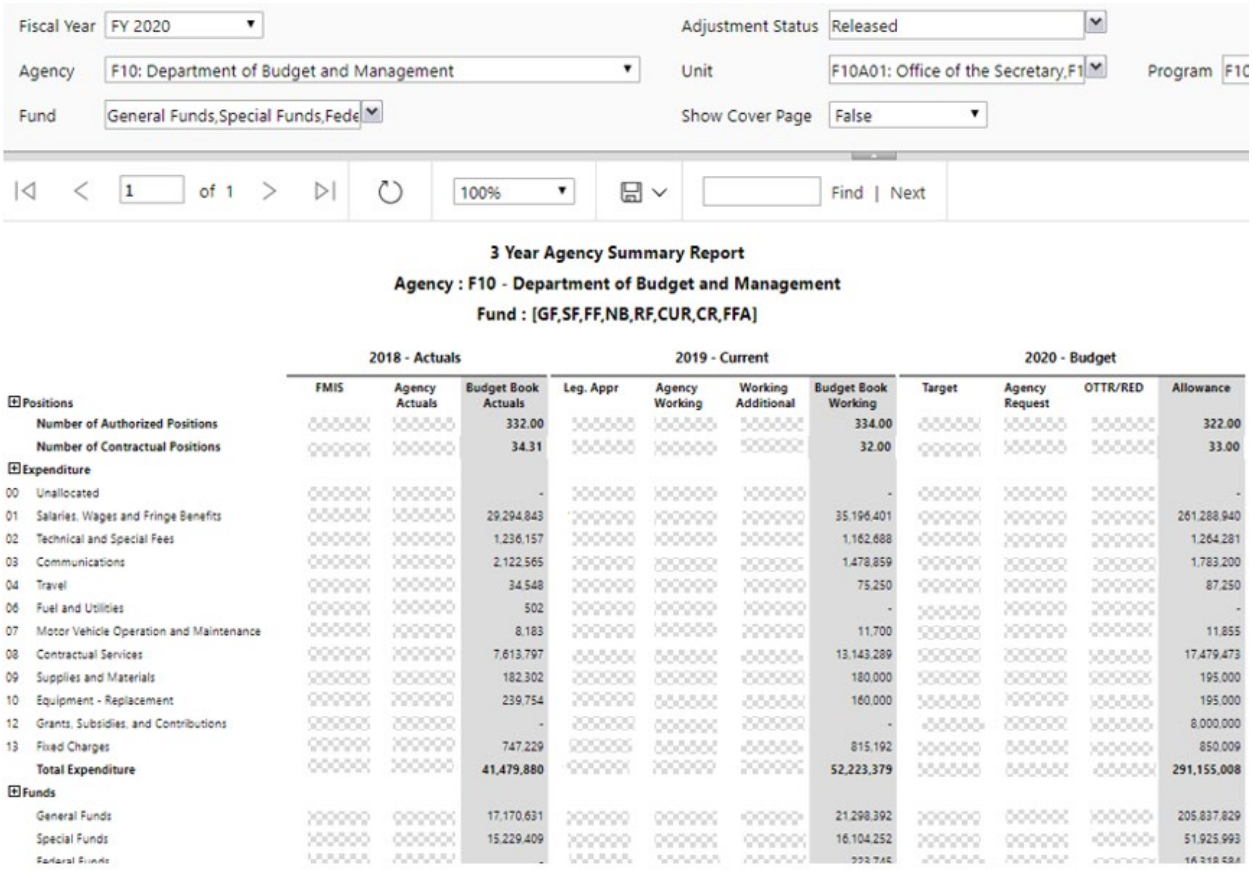
Confirm that all **Fund** types are checked (fund types not included in the budget will not be shown)



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:



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.