

# Utilizing the Search Function

## Introduction

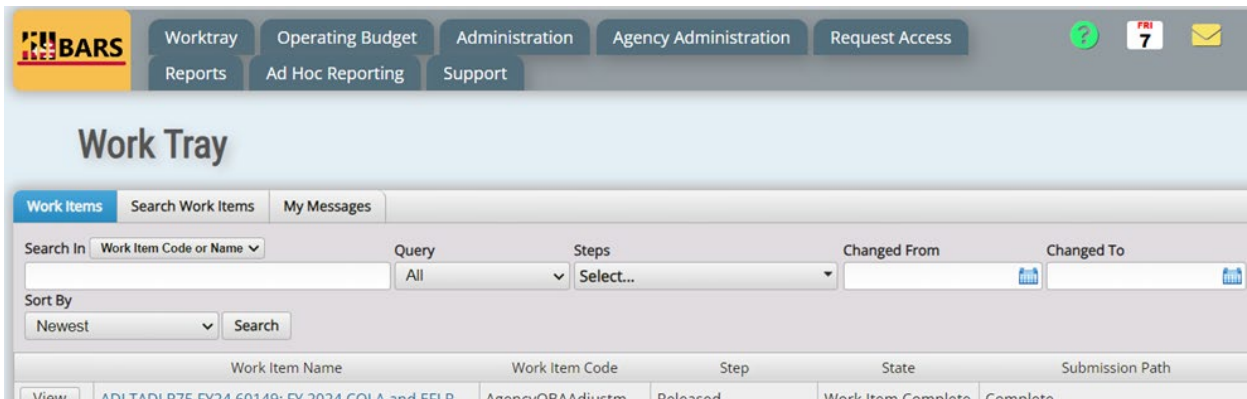
The search function in BARS has gotten slightly easier to use. Before the recent BARS update, there were two search tabs - Work items and Search Work Items. These two tabs still exist; however, users can now search directly in the 'Work items' tab instead of needing to utilize the 'Search Work items' tab. If a user does navigate to the 'Search Work' items tab, they will notice that it defaults to query all work items 'Created by Me'.

### 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 the BARS Work Tray interface. At the top, there is a navigation bar with buttons for Worktray, Operating Budget, Administration, Agency Administration, Request Access, Reports, Ad Hoc Reporting, and Support. Below this is the 'Work Tray' header. The main content area has tabs for 'Work Items', 'Search Work Items', and 'My Messages'. The 'Work Items' tab is active, showing a search bar with a dropdown menu for 'Search in' (set to 'Work Item Code or Name'), a 'Query' dropdown (set to 'All'), a 'Steps' dropdown (set to 'Select...'), and 'Changed From' and 'Changed To' date pickers. Below the search bar is a 'Sort By' dropdown (set to 'Newest') and a 'Search' button. At the bottom, there is a table with columns for 'Work Item Name', 'Work Item Code', 'Step', 'State', and 'Submission Path'. The first row of the table shows a work item with the name 'ADJ TADLR75 FY24 60149: FY 2024 COLA and FFL R', code 'AgencyORAadjustm', step 'Released', state 'Work Item Complete', and submission path 'Complete'.

### Step 3: Searching for a work item by Work Item Code or Name

On the Work tray page, the user will find a search bar at the top of the page with several search options available. Next to 'Search in', you will see a dropdown menu that includes 'Work Item Code' and 'Name'.

**Work Item Code:** This field is for the BARS-generated work item ID which is created after a work item has been submitted or saved.

**Name:** This field allows the user to search for any part of a Work Item's name which includes the abbreviations for document type (Ex: Adj for Adjustment), Adjustment Type (Ex: AADJ for Agency Adjustment), Agency Code (if a user has access to multiple agencies), the fiscal year (ex: FY26), the adjustment number (generated by BARS after the submission of an adjustment), and the adjustment name (created by the user)

#### Step 4: Utilizing the other search features

Users will also notice additional search features on the Work Items tab. These features include the following:

##### Query Dropdown Menu Items

**Available to claim:** Work items sitting at the 'Available' state. The work item has either been submitted or saved and can be continued or completed by users

**Claimed by me:** The work item is claimed by the user performing the search

**Claimed by someone else:** The work item is claimed by another user

**In progress:** The work item is any work item that is not completed (i.e. Available, In Use, Claimed)

**Completed:** Any work item that is sitting at the complete step ('Step Complete', Work item Complete')

**All:** All the work items available in the work tray

##### Steps Dropdown

This dropdown allows users to filter work items to include various steps available to users (based on their security level) in the work tray.

##### Changed From Fields

These fields allow users to set a search range for adjustments that may have been archived and cannot be found readily in the work tray.

*Note: If users are having trouble finding a specific adjustment, please make sure that the dates are correct. The system automatically sets a date range to the last 30 days. Increasing the date range will help users find the adjustments.*

##### Sort By

This allows users to search for adjustments based on the following:

**Newest:** This displays the items in the work tray by showing the newest work items (by time created) at the top of the list

**Work Item ASC:** Displays the adjustments in order from oldest to most recent adjustments in the work tray

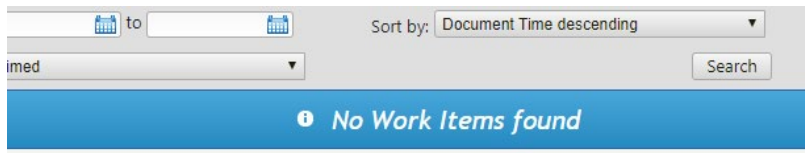
**Work Item Desc:** Displays the adjustments in order from most recent to oldest adjustments in the work tray

**Step Name ASC:** Displays the adjustments based on ascending order of the step name. The step names will appear in alphabetical order starting from A - Z

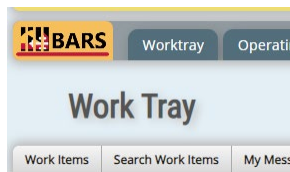
**Step Name Desc:** Displays the adjustments based on descending order of the step name. The step names will appear in reverse alphabetical order starting from Z - A.

*\*Note: The user must click the 'search' button for the filters to be applied*

*\*Note: Occasionally, the user might see an empty Work tray when there should be content. If the user sees this (similar to the following screenshot)*





*This can be fixed by clicking the BARS icon at the top of the screen.*



### Step 5: Understanding the difference between claim and view

Adjustments may have either 'View' or 'Claim' next to them on the left-hand side on the work tray. If the adjustment displays 'claim', this indicates that the adjustment is available to claim. If the adjustment lists as 'view', it means that the document is not available to claim as it is already claimed by another user.

	Work Item Name
 Claim	<a href="#">ACM.D60.59791: Add new contracts</a>
View	<a href="#">ACM.D60.59791: Add new contracts</a>
 View	<a href="#">ACM.D60.59791: Add new contracts</a>
Claim	<a href="#">ADJ.ARED.K00.FY26.59767: 1890 test</a>
Claim	<a href="#">ADJ.OADJ.L00.FY26.59790: OBA adjustment test - Position and expenditure balance</a>
View	<a href="#">ADJ.OADJ.L00.FY26.59790: OBA adjustment test - Position and expenditure balance</a>

*\*Note: Users also can view adjustments (whether they are available for claim or viewing) by selecting the work item hyperlink which will open the adjustment in a separate window. When a user hovers over the work item, the adjustment ID will become underlined which indicates that the adjustment is available to view in another window. This will allow users to view an adjustment without claiming it and export grids but will ensure that no changes can be made to the adjustment.*

Open	<a href="#">ADJ.OTEC.L00.FY23.Draft.39237: Test</a>
Open	<a href="#">BRS.39126: &lt;--No Title o</a> <a href="#">ADJ.OTEC.L00.FY23.Draft.39237: Test</a>

### Step 6: Understanding the way work items are named

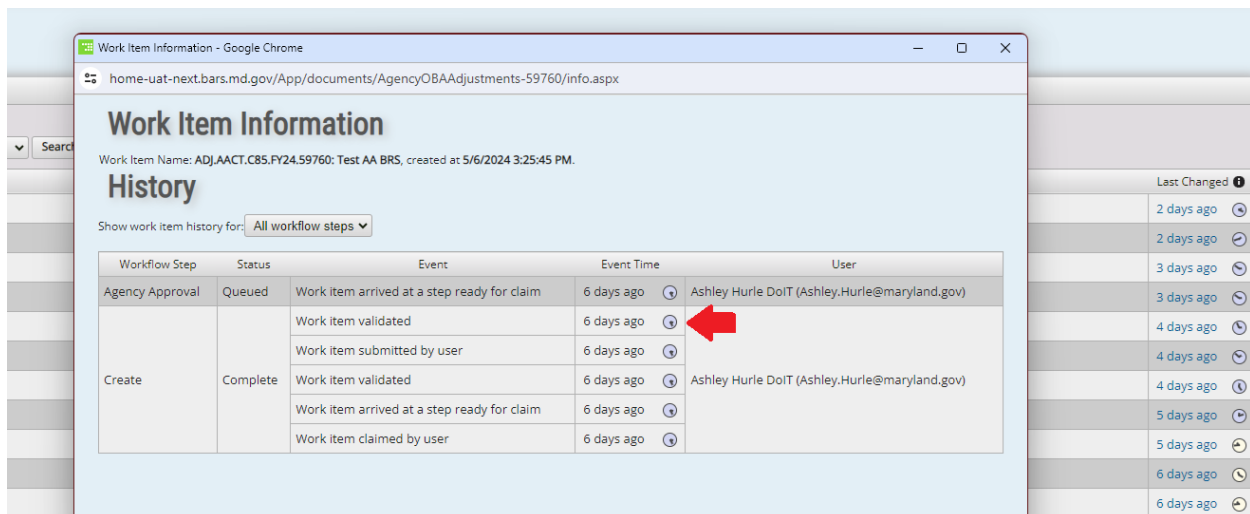
**Work Item Name:** Includes a name entered by a user when creating an adjustment and specific data that is uniquely identifiable to that adjustment. BARS automatically creates a portion of each Work Item's name in the Work tray. This consists of several parts, as shown in the example below:

Claim	ADJ.AADJ.E17.FY26.59778: RF BRS	AgencyOBAAdjustments-59778	Agency Approval	Available
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- **ADJ:** The type of Work Item (Adjustment)
- **OADJ:** The type of Adjustment (Agency Over The Target Requests)
- **E17:** The Agency Code
- **FY26:** The Fiscal Year
- **59778:** The unique ID for the Work Item
- **Agency Approval:** The Status of the Work Item
- **"RF BRS":** The adjustment name created by the user

### Step 7: Viewing the work item history

Historically, there was an information icon on the left-hand side of the screen. However, now there is a clock icon on the right-hand side of the screen under the 'Last Changed' column. Brings up a window that displays "Work Item: Information" about the process of a particular adjustment. This history will detail who created, made changes to, or submitted the adjustment.



Work Item Information - Google Chrome  
 home-uat-next.bars.md.gov/App/documents/AgencyOBAAdjustments-59760/info.aspx

### Work Item Information

Work Item Name: ADJ.AACT.C85.FY24.59760: Test AA BRS, created at 5/6/2024 3:25:45 PM.

### History

Show work item history for:

Workflow Step	Status	Event	Event Time	User
Agency Approval	Queued	Work item arrived at a step ready for claim	6 days ago	Ashley Hurle DoIT (Ashley.Hurle@maryland.gov)
		Work item validated	6 days ago	Ashley Hurle DoIT (Ashley.Hurle@maryland.gov)
		Work item submitted by user	6 days ago	Ashley Hurle DoIT (Ashley.Hurle@maryland.gov)
Create	Complete	Work item validated	6 days ago	Ashley Hurle DoIT (Ashley.Hurle@maryland.gov)
		Work item arrived at a step ready for claim	6 days ago	Ashley Hurle DoIT (Ashley.Hurle@maryland.gov)
		Work item claimed by user	6 days ago	Ashley Hurle DoIT (Ashley.Hurle@maryland.gov)

Last Changed

- 2 days ago
- 2 days ago
- 3 days ago
- 3 days ago
- 4 days ago
- 4 days ago
- 4 days ago
- 5 days ago
- 5 days ago
- 6 days ago
- 6 days ago