

# BARS Workshop

15<sup>th</sup> November 2011

Guidelines for users

# Progress Reports

Login to BARS with your username and password. You will be greeted with this screen:

The screenshot shows the BARS user area dashboard. At the top, there is a navigation bar with links for User Area, Action Plans, Status & Trends, Targets & Outcomes, Actions & Impacts, News, Help & Information, and Logout. The date 27 October 2011 is displayed. The BARS logo and the text 'Biodiversity Action Reporting System' are prominent. Below the navigation bar, the user is logged in as Steven Hannah. There are two buttons: 'Edit my actions' and 'Edit my action plans'. The main content area is divided into several sections: 'BARS data entry application' with a description and a link to go to the application; 'Biodiversity action maps' with a link to view actions on a map; 'Custom reports' with a link to search the database; 'My LBAP partnership(s)', 'My organisation(s)', 'My national plans', 'My country strategies', and 'My actions', each with a 'View reports >' link; 'My contact details' with a link to manage details; and 'BARS admin' with a link to go to admin and a list of tasks for co-ordinators and administrators.

From here you can access any plans that you are a named contact on, as well as start to produce various reports for these plans.

To view the Scottish Borders LBAP click on [Go to BARS data entry application >](#). You will then be presented with this screen:

The screenshot shows the 'Welcome to the BARS data entry application' screen. On the left, there is a navigation tree with icons for BARS, Edinburgh Biodiversity Partnership, Scottish Borders Local Biodiversity..., The Wildlife Information Centre, and My actions. The main content area contains a welcome message and instructions: 'Each of the icons on the left represents a National plan or LBAP partnership to which you have been granted access rights. Click on any of the icons in the tree view to access data on plans, targets and actions. Click the My Actions icon at the bottom of the tree to go straight to ALL of your actions. This application is primarily for entering and editing your own data. To generate reports from your data, or to view the information entered by others, return to your user area and select from the 'Custom reports' options. A series of information notes can be found under the Help menu at the top left of the screen. Before first using the BARS application, please read the relevant information notes below'. A list of notes is provided: 'Using the BARS application', 'Priorities for data entry', 'Recommended data entry sequence for LBAP co-ordinators', 'Recommended data entry sequence for lead partners', and 'Recommended data entry sequence for other BARS users'.

This is the main screen of the data entry application. LBAP Co-ordinators can edit the main plan from here, but most users will use this screen to create progress reports on actions for each Habitat Action Plan (HAP).

Click on My actions in the toolbar on the left hand side. This will then open a list containing all actions which have been assigned to you. Click on an action and you will see a window similar to this:

**Action code: WS1**  
This is an example action for the BARS Workshop.  
Plan name: Workshop

**Action goals** | **Links & labels** | **Resources** | **Progress reports** | **Comments**  
**Details** | **Action species & habitats** | **Action locations** | **Organisations / contacts** | **Status**

**Action code:** WS1  High priority action  
**BARS code:** {78E57C18-5A77-4BB8-9410-402BEEA469F2} **Current status:** Not started  
To edit click status tab

**Action start and end dates (dd/mm/yyyy):** 27/10/2011 28/10/2012  No end date  Archive action (excludes action from searches and reports)  Repeat action every - Select -

**Action text:**  
This is an example action for the BARS Workshop.

**Action category 1:** Communication - advisory  
**Action category 2:** Provide advice / develop guidelines for key groups (e.g. decision makers, farmers, land owners)  
Last updated by Steven Hannah  
27 October 2011 at 13:31

Save Cancel OK

**Action code:** The code assigned to this particular action. In the Borders LBAP the code is an abbreviation of the HAP name followed by a number.

**Start and End date:** This is when the action started and when it is expected to/when it did end. Some actions are marked with no end date where an action is continuous or has no listed end date as yet.

**Action text:** A description of the action.

**Action Category 1:** BARS categorises all actions into 1 of 13 possible broad categories. Each action must fall into one of these categories.

**Action Category 2:** A further sub-category to help classify the action. Not necessary if the action does not fall into any of these headings.

The actions for the Borders LBAP have already been entered into the system and so data entry for these will be unnecessary. To create a progress report click on the Progress Reports tab at the top of that screen, then click on the Add progress report button. This window will then pop up:

The screenshot shows a web browser window titled "Add progress report - Mozilla Firefox". The address bar shows the URL "https://ukbars.defra.gov.uk/registered/app/action\_plan\_action\_progress\_add.as". The form contains the following fields and options:

- Reporting organisation:** A dropdown menu with "The Wildlife Information Centre" selected. A "Help ?" button is to the right.
- Contact:** A dropdown menu with "Hannah, Steven (GIS & Data officer)" selected.
- Start and end dates of reporting period (dd/mm/yyyy):** Two date input fields, both containing "27/10/2011". A checkbox labeled "Confidential progress report" is to the right and is unchecked.
- Progress summary:** A large, empty text area.
- Locations relevant to this progress report:** A checkbox labeled "Scottish Borders" is checked. To its right is a dropdown menu with "Unitary Authority (Scotland)" selected.
- References to publications:** A large, empty text area.
- Upload full report:** A text input field with the label "Title for uploaded report:". Below it is a "Browse..." button.
- At the bottom right of the form, there are "OK" and "Cancel" buttons.

**Reporting organisation:** The name of the organisation for this report. This will automatically be filled in with your organisations name, but can be changed if you are entering the data on behalf of someone else.

**Contact:** The name of the contact for this report. This will automatically be filled in with your organisations name, but can be changed if you are entering the data on behalf of someone else.

**Start and end dates of reporting period:** The period for which the progress report covers. This is not necessarily the same as the start and end dates of the action.

**Progress summary:** A brief summary of the progress made so far. Does not need to be overly detailed, especially if you are attaching a document to this report.

**References to publications:** Any publications referenced in this progress report.

Upload full report: You can upload word documents, excel spreadsheets, PDFs and powerpoint presentations as part of the progress report. Give the uploaded document a title, then click browse to navigate to the files location on your computer. Double click the file you wish to upload.

Once these fields have been entered, click OK to submit the progress report. If the report is to mark the completion of an action, the status of the action will be updated by one of the LBAP co-ordinators.

## Additional Reporting

BARS has a powerful reporting facility which allows the user to create various kinds of reports. This guide will illustrate how to create a report detailing the actions assigned to an organisation as an example. Returning to the main page, click on [My LBAP Partnerships](#), then select Scottish Borders LBAP Partnership. You will then come to this screen:

**BARS user area**

28 October 2011

Home > [BARS user area](#) > Display reports for my LBAP partnership(s)

**Display reports for my LBAP partnership(s)**

You are reporting on **Scottish Borders Local Biodiversity Action Plan**  
Use the radio buttons below to change the LBAP partnership you wish to report on.

Edinburgh Biodiversity Partnership  
 Scottish Borders Local Biodiversity Action Plan

**Partnership reports**

- [Partnership habitats and species](#)  
Habitats and species identified as local priorities for this partnership, including latest assessment of status and trends.
- [Habitats and species worked on by the partnership](#)  
Use this report to display a summary of the number of targets and actions for each of the habitats and species worked on by the partnership.
- [Threats](#)  
Factors causing decline of habitats and species in the partnership area.
- [Loss events for habitats and species](#)  
Actual losses recorded for habitats and species by the partnership.
- [Newsworthy reports](#)  
Use this option to find overview reports for plans that have been labelled as "newsworthy".

**Plan-level reports**

- [Complete action plan](#)  
A complete output of all fields for the highlighted action plan, including targets and actions.
- [Plan overview reports](#)  
Most recent overview reports for each plan.
- [Constraints to plans](#)  
Plan-level constraints identified in the overview reports, summarised for all plans.

**Target-based reports**

- [Target progress across plans](#)  
Latest assessment and progress report for targets in each plan.
- [Progress towards target goals](#)  
Progress towards numeric target goals, including relevant data from actions.
- [Targets linked to actions](#)  
This report provides an overview of progress with those actions specifically linked to plan targets. This report will not be relevant to all LBAPs.

**Action-based reports**

- [Plan action progress summary](#)  
Number of actions in each status category for each plan.
- [Organisation action progress summary](#)  
Number of actions in each status category for each organisation.
- [Action status report](#)  
An overview of the status of each action for either a selected plan or an organisation.
- [Action progress report](#)  
An overview of the recent progress reports for each action for the highlighted plan.
- [Progress towards action goals](#)  
Latest progress towards quantitative action goals.

**Resource reports**

- [Plan resource report](#)  
Resource report for each plan: funding, staff and volunteer time.
- [Action expenditure](#)  
Resource expenditure for actions showing shortfalls and excesses.
- [Organisation expenditure](#)  
Allocated and actual resource expenditure by organisations.

**Audit reports**

- [Updates to Targets and Actions](#)  
Use this report to see which partnership targets and actions have or have not been updated since a given date.
- [BARS usage](#)  
Use this report to see when members of the partnership last logged in.
- [Partnership address book](#)  
View details for members of the partnership.
- [Work planning chart](#)  
Use this report to generate charts showing the timetable for starting and completing actions.

Under the heading of Action-based reports, click on [Action Status Report](#). Select [Organisation Report](#) and press the Select options button. Choose the organisation you wish to report on, and a location if you wish, and then press the View report button. You will be taken to a screen similar to this:

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### Action status report

**Search criteria specified:** Scottish Borders Local Biodiversity Action Plan  
The Wildlife Information Centre  
All locations

**Organisation:** The Wildlife Information Centre

Plan name(s)	Action code	Action description	Location	Start date	End date	Status	Contacts (lead in bold)
Workshop	WS1	This is an example action for the BARS Workshop.	Scottish Borders	27/10/2011	28/10/2012	Not started	<b>The Wildlife Information Centre</b> <b>(Steven Hannah)</b>

This report was generated on 28/10/2011 using the Biodiversity Action Reporting System (BARS) © 2004-2011

Open this report using [Microsoft Excel](#)

Open this report using [Microsoft Word](#)

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You can then export the report into Word or Excel for further manipulation.