**BEARS: Navigating the System**

This lesson provides an overview of the layout of the BEARS system.

**Key Notes:**

- To log in to BEARS, go to [home.bears.tn.gov](http://home.bears.tn.gov)
- The modules and tasks in BEARS are organized by budget phase.

<table>
<thead>
<tr>
<th>BEARS Navigation</th>
<th>Description</th>
<th>Budget Phase</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Development</td>
<td>Preparation of the budget before the fiscal year begins</td>
<td>Budget Request, Budget Analysis, Work Program</td>
<td>Cost Increases, reductions, transfer, expansions, etc.</td>
</tr>
<tr>
<td>Execution</td>
<td>Revisions to the budget after the start of the fiscal year</td>
<td>Ongoing, however adjustments only affect the current fiscal year</td>
<td>Journals, closing adjustments</td>
</tr>
</tbody>
</table>
BEARS: Navigating the System

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How Do You Navigate Within BEARS?

The navigation buttons are the main tools used to access each module in BEARS. For easier use, they are sorted by budget phase. Please note that not all of these modules are visible to all users. For example, Agency Analysts will not see Endorse Activities because they do not have security access to it.

![Navigation Buttons](image)

*Note: The circled modules may be used for the FY18 budget request.*

**Worktray**

Serves as the BEARS home page and displays all items in the workflow.

**Development**

Contains four modules that are used during the development of a proposed budget and work program.

- **Perform Adjustments**
  - Used to create all budget adjustments and activity allocations.

- **Manage Adjustment Groups**
  - Used to create groups of adjustments for easier submission.

- **Endorse Adjustments**
  - Used to submit groups of adjustments to F&A.

- **Manage Activities and Codes**
  - Used to create and modify budget activities.
Execution

Contains four modules that can be used throughout the execution of the approved budget, including modules that affect the current fiscal year.

Position Inventory

Used to compare and make changes to position information in the budget vs. position information in Edison

Budget Revision Adjustment

Used to create budget journals.

Monthly Variance Reporting

Used to monitor and make changes to the budget on a monthly basis.

Agency Review

Used to monitor an agency’s financials.

Reports

Contains various ad-hoc reports. For more detail on reports, see the BEARS: Reports training guide.

Access Request

Used to request and modify user access.
What Is The Worktray?

- The worktray serves as the home page each time you log in to the BEARS system.
- All work items that have been created, including all claimed and unclaimed adjustments, appear in the worktray.
- There are methods for filtering the work items to alleviate clutter.
- The items that appear in the worktray are automatically filtered by security level. A BEARS user cannot see items that are in the workflow at steps higher than his/her security level.
  
  Example: An Agency Approver can view and claim items at the Delegate and Central Office steps, but cannot view and claim items at the F&A step.
- BEARS will automatically assign each adjustment its own, unique number. It is recommended that you keep a log of each adjustment number and a description of the adjustment it refers to so that it is easier to search for an individual adjustment.
- The Search feature is a helpful tool when looking for one adjustment in particular. You can search by the adjustment name, number, classification, or date.
- After submitting an adjustment to the F&A step, an agency can use the Search feature to check on its approval status.
A) **Sorting Through the Worktray**

There are two ways to sort items that appear in the worktray. Sorting items can be very useful as an item moves through the workflow.

1) The tabs featured at the top of the worktray serve as a shortcut for filtering commonly-used parameters.
2) The filter below the tabs can be used to utilize more specific parameters.

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**Descriptions of Worktray Tabs**

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>My Work</strong></td>
<td>Shows all items that you have claimed and all items that you have created but have not yet submitted to the workflow. Only you have the ability to modify these items.</td>
</tr>
<tr>
<td><strong>All Available Items</strong></td>
<td>Shows all items that are available to be claimed. This includes items at every workflow step but is restricted by security levels. A user can see items at and below their security level, but cannot see items above their security level.</td>
</tr>
<tr>
<td><strong>Central Office</strong></td>
<td>Shows all items at your assigned step in the workflow. In the case of an Agency Approver, this tab will show all items at the Central Office workflow step. For an Agency Analyst, this tab will show all items at the Delegate workflow step.</td>
</tr>
<tr>
<td><strong>Released</strong></td>
<td>Shows all items that have been approved at every workflow step and have been included in the recommended budget. For the budget request phase, adjustments won’t appear in the Released tab until the budget is published.</td>
</tr>
<tr>
<td><strong>Other People’s Work</strong></td>
<td>Shows all items that you could normally see because of your security access but are currently claimed by another user. These items are available for viewing in a read-only format.</td>
</tr>
</tbody>
</table>
Version 3.0

Search History

Allows a user to search for a work item by name, number, classification, status, or date. When using the search feature to find documents that have been sent to F&A, be sure to change the History Filter to show “Search Latest and Historic Documents”.

My Messages

This feature has not yet been developed in BEARS.

Descriptions of Worktray Filters

<table>
<thead>
<tr>
<th>Filter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Item Name:</td>
<td>Can be used to search for a work item by name and is available to be used within a chosen tab as a second method of filtering.</td>
</tr>
<tr>
<td>Step:</td>
<td>Can be used to search for a work item by current workflow step and is available to be used within a chosen tab as a second method of filtering.</td>
</tr>
<tr>
<td>Date Last Changed:</td>
<td>Can be used to filter the items by the creation date.</td>
</tr>
<tr>
<td>Sort by:</td>
<td>Can be used to modify the order the items appear in the workflow.</td>
</tr>
<tr>
<td>Work Item Status:</td>
<td>Can be used to filter the items by availability. This is the same filter used for the tabs.</td>
</tr>
</tbody>
</table>
B) **Understanding Items in the Worktray**

- **Claim**
  - Allows you to claim an item to edit or view it. This button may say “Claim”, “Open”, or “View” depending on the item’s status and whether or not another user has already claimed it.

- **BDEADJ**
  - Describes the module in which the work item was created. See below for a full list of acronyms.

- **-3471**
  - Displays the unique classification number that is assigned by BEARS for each individual work item. Keeping a log of these numbers will make it easier to search for individual adjustments later.

- **(39900)**
  - Describes the agency affected by the work item.

- **Computer Replacement Schedule**
  - Displays the adjustment name that was entered in the **Overview** tab for each individual item.

- **(Cost Increase)**
  - Describes the adjustment classification type.

- **6/28/2016 5:20:06 PM**
  - Displays the time the item was last modified.

- **Central Office**
  - Displays the workflow step in which the item is located.
Descriptions of Adjustment Acronyms

<table>
<thead>
<tr>
<th>Budget Development (BDE)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BDEADJ</td>
<td>Perform Adjustment – Occurs in the Development stage and would be attached to a single adjustment.</td>
</tr>
<tr>
<td>BDEMAG</td>
<td>Managing Adjustment Groups – Occurs in the Development stage and would identify groups of adjustments you have created.</td>
</tr>
<tr>
<td>BDEEND</td>
<td>Endorsement - Occurs in the Development stage and would identify groups that have been endorsed and sent to F&amp;A.</td>
</tr>
<tr>
<td>BDEBRT</td>
<td>Budget Reversion Target – Reversion monitoring</td>
</tr>
<tr>
<td>BDEBRA</td>
<td>Revision/Journal Adjustments – Where current year journals would be created.</td>
</tr>
<tr>
<td>BDEBRM</td>
<td>Budget Review and Monthly Allocations</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Budget Execution (BEX)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEXPOS</td>
<td>Position Inventory – Occurs in the Execution stage and would identify an adjustment made in the position inventory/personnel file.</td>
</tr>
<tr>
<td>BEXMVR</td>
<td>Monthly Revision Adjustment</td>
</tr>
<tr>
<td>BEXECA</td>
<td>End of Year Closing Adjustments</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Security Access (ACS)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACSREQ</td>
<td>Access Requests</td>
</tr>
</tbody>
</table>

Note: The acronyms in gray are used for the FY18 Budget Request.

C) Claiming Items in the Worktray

1. Work items that need your review or approval will be listed in the All Available Items worktray. Click on the tab to view the list.
2. When you click the “Claim” button next to a work item, you have claimed that item and it opens for you to review, update, or submit to its next workflow step.

*Note: If you claim an item, it will now be listed in “My Work”.*

*Note: Once a work item is claimed, no other users may edit that item.*

<table>
<thead>
<tr>
<th>Work Item Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Claim</td>
</tr>
<tr>
<td>BDEADJ-2697 (31700) - Reduce Operational Expenditures</td>
</tr>
</tbody>
</table>

3. The item will open to the **Overview** tab and you will be able to make changes and review it.

4. When you have finished working with the item, go to the **Workflow** tab.

5. Under Workflow Transition, use the dropdown menu to select your desired workflow transition.

   - **Send to Delegate** – Sends to the Delegate step and allows Agency Analysts the ability to review.
   - **Send to Central Office** – Sends to the Central Office step and allows Agency Approvers the ability to review.
   - **Send to F&A** – Sends to the F&A step and allows Budget Analysts the ability to review.
   - **Delete** – Select this option to delete the Budget Adjustment.

6. Submit the item to send it back to the workflow.
How Do You Navigate Inside a Claimed Work Item?

Action Buttons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Print Icon]</td>
<td>Print</td>
<td>Prints the current page.</td>
</tr>
<tr>
<td>![Reload Icon]</td>
<td>Reload</td>
<td>Erases all changes made to any adjustment since the last time it was claimed from the workflow.</td>
</tr>
</tbody>
</table>
| ![Cancel Icon] | Cancel | Removes any updates or data entered to an item. Clicking the Cancel button releases work items from your claim, discards changes, and returns the item to the All Available Items tab of the worktray.  

*Note: If the item is newly-created and has not been sent to the workflow at any point, clicking Cancel will delete the item.* |
| ![Save Icon] | Save | Saves data entered in a work item. The BEARS system does use auto-save, but saving frequently is still important. |
| ![Validate Icon] | Validate | Checks data entered in a work item against validation and budget rules. Validating ensures all data requirements are completed, i.e. expenditures and revenues balance. Any validation errors will be displayed in the Validation tab with details of the specific error message. |
| ![Submit Icon] | Submit | Submits a work item to the workflow. The item can be sent up and down the workflow depending on the chosen workflow transition.  

*Note: Clicking the Submit button automatically validates the data entered.* |
| ![Help Icon] | Help | Displays a user guide or other help information for the current screen. |
What Does BEARS Look Like When You Log In Away From the State Network?

Since BEARS is an internet-based program, it is feasible to access the system from any computer.

Logging in to BEARS while at work will bring you directly to your worktray, which will serve as the home page. However, if you log in to BEARS away from the network, you will have to complete the following visual response test before gaining access.