

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
- The modules and tasks in BEARS are organized by budget phase.

BEARS Navigation	Description	Budget Phase	Examples
Development	Preparation of the budget before the fiscal year begins	Budget Request Budget Analysis Work Program	Cost Increases, reductions, transfer, expansions, etc.
Execution	Revisions to the budget after the start of the fiscal year	Ongoing, however adjustments only affect the current fiscal year	Journals, closing adjustments

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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.

The screenshot shows the BEARS interface. At the top left is the TN Department of Finance & Administration logo. To its right is the text 'BEARS Budget Entry Analysis & Reporting System'. Below this is a navigation bar with five buttons: 'Worktray', 'Development', 'Execution', 'Reports', and 'Access Request'. An arrow points to the 'Worktray' button. To the right of the navigation bar, the user is identified as 'User: NET\AGBUD105' with a 'Help' link. Below the navigation bar is the 'Worktray' section, which includes tabs for 'My Work', 'All Available Items', 'Central Office', 'Released', 'Other People's Work', 'Search History', and 'My Messages'. Below the tabs are search filters for 'Work Item Name', 'Date Last Changed', 'Work Item Status', and 'Step'. A 'Search' button is also present.

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?

TN Department of Finance & Administration | BEARS Budget Entry Analysis & Reporting System
 User: NET\AGBUD105 ? Help

Worktray | Development | Execution | Reports | Access Request

Worktray | My Work | All Available Items | Central Office | Released | Other People's Work | Search History | My Messages

Work Item Name: Step:
 Date Last Changed: from to
 Work Item Status: Sort by:

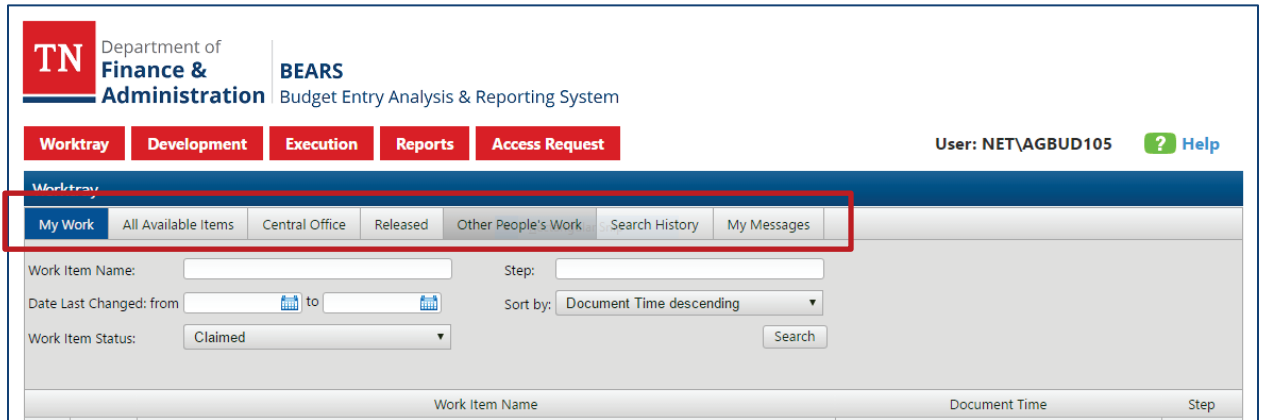
Work Item Name	Document Time	Step
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- The worktray serves as the home page each time you log in to the BEARS system.
- All work items that have been created, including all claimed and unclaimed adjustments, appear in the worktray.
- There are methods 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.

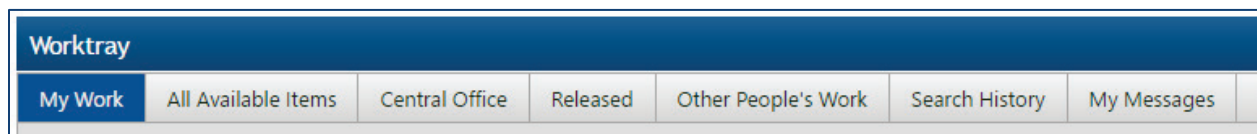
A) Sorting Through the Worktray

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



The screenshot shows the BEARS (Budget Entry Analysis & Reporting System) interface. At the top, there is a header for the Department of Finance & Administration. Below this, there are navigation tabs: Worktray, Development, Execution, Reports, and Access Request. The user is identified as NET\AGBUD105. A red box highlights the Worktray sub-navigation tabs: My Work, All Available Items, Central Office, Released, Other People's Work, Search History, and My Messages. Below the tabs, there are search filters for Work Item Name, Date Last Changed, Work Item Status, and Step. A blue arrow points from the highlighted tabs area to a zoomed-in view below.



This is a zoomed-in view of the Worktray navigation tabs. The tabs are: My Work, All Available Items, Central Office, Released, Other People's Work, Search History, and My Messages. The 'My Work' tab is currently selected and highlighted in blue.

Descriptions of Worktray Tabs

My Work	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.
All Available Items	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.
Central Office	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.
Released	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.
Other People's Work	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.

<p>Search History</p>	<p>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”.</p>
<p>My Messages</p>	<p>This feature has not yet been developed in BEARS.</p>

BEARS
 Budget Entry Analysis & Reporting System

Worktray Development Execution Reports Access Request User: NET\AGBUD105 Help

Worktray
 My Work All Available Items Central Office Released Other People's Work Search History My Messages

Work Item Name: Step:
 Date Last Changed: from to Sort by: Document Time descending
 Work Item Status: Claimed Search

Work Item Name Document Time Step

Work Item Name: Step:
 Date Last Changed: from to Sort by: Document Time descending
 Work Item Status: Claimed Search

Descriptions of Worktray Filters

<p>Work Item Name:</p>	<p>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.</p>
<p>Step:</p>	<p>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.</p>
<p>Date Last Changed:</p>	<p>Can be used to filter the items by the creation date.</p>
<p>Sort by:</p>	<p>Can be used to modify the order the items appear in the workflow.</p>
<p>Work Item Status:</p>	<p>Can be used to filter the items by availability. This is the same filter used for the tabs.</p>

B) Understanding Items in the Worktray

Work Item Name		Document Time	Step
Claim	BDEADJ-3471 (39900 - Computer Replacement Schedule (Cost Increase)	6/28/2016 5:20:06 PM	Central Office

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	
Budget Development (BDE)	
BDEADJ	Perform Adjustment – Occurs in the Development stage and would be attached to a single adjustment.
BDEMAG	Managing Adjustment Groups – Occurs in the Development stage and would identify groups of adjustments you have created.
BDEEND	Endorsement - Occurs in the Development stage and would identify groups that have been endorsed and sent to F&A.
BDEBRT	Budget Reversion Target – Reversion monitoring
BDEBRA	Revision/Journal Adjustments – Where current year journals would be created.
BDEBRM	Budget Review and Monthly Allocations
Budget Execution (BEX)	
BEXPOS	Position Inventory – Occurs in the Execution stage and would identify an adjustment made in the position inventory/personnel file.
BEXMVR	Monthly Revision Adjustment
BEXECA	End of Year Closing Adjustments
Security Access (ACS)	
ACSREQ	Access Requests

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.

Worktray

My Work **All Available Items** Central Office Released Other People's Work Search History My Messages

Work Item Name: Step:

Date Last Changed: from to

Sort by: Document Time descending ▼

Work Item Status: Available ▼

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.

Work Item Name	
Claim	BDEADJ-2697 (31700) - Reduce Operational Expenditures

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?

BDEADJ-3472 (39900) - Computer Replacement (Cost Increase) - Start

Print Reload Cancel Save Validate Submit

Overview Expenditures Revenues Positions Workflow Validation








Budget Year: FY2017 Agency: 39900 BEARS

Adjustment Classification: Cost Increase

Adjustment Name: Computer Replacement

Description: Create a computer replacement schedule

Action Buttons

Icon	Button	Description
	Print	Prints the current page.
	Reload	Erases all changes made to any adjustment since the last time it was claimed from the workflow.
	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. <i>Note: If the item is newly-created and has not been sent to the workflow at any point, clicking Cancel will delete the item.</i>
	Save	Saves data entered in a work item. The BEARS system does use auto-save, but saving frequently is still important.
	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	Submits a work item to the workflow. The item can be sent up and down the workflow depending on the chosen workflow transition. <i>Note: Clicking the Submit button automatically validates the data entered.</i>
	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.


State Government of Tennessee - Budget Entry, Analysis and Reporting System (BEARS)

[Login](#) [Sign Up](#) [Contact HelpDesk](#)

Welcome to the State of Tennessee Budget Entry and Analysis System (BEARS). If you are a State of Tennessee Active Directory User, regardless of whether you have previously used BEARS, please login with your username and password. If you are an external user please click on the "Sign Up" link if you believe you should be authorized to use the system to request access.

If you are an existing user, please complete the verification image task below and then enter your username and password and click the "Login Now" button.

Click the Bear's left eye



Username

Password

Login Now »

