

## BEARS Adjustment Groups

This lesson will provide a conceptual overview of the Managing Adjustment Groups (BDEMAG) and Endorse Adjustments (BDEEND) modules in the BEARS system.

### Key Notes:

- Adjustment groups allow agencies the ability to organize a large number of adjustments into smaller, more easily managed sets. Each set can be sent up and down the workflow as one single item. This process is referred to as endorsing an adjustment group.
- This function will be most useful during the budget request and work program phases, when multiple adjustments are sent as a single package.
  - During the base request phase, an agency can assign all cost increases, reductions, and base adjustments to one group, “FY18 Budget Request”, in order to make the budget submission process simpler.
- For agency BEARS users, only the Agency Approvers have the authority to create and endorse (send) adjustment groups.
- It is recommended that only one user per agency creates and endorses (sends) groups so as to minimize the overriding of data. Other users can run reports based on those adjustment groups, but only one user should be managing them.
- An adjustment can only exist in one group at any given time.
- Creating an adjustment group and assigning adjustments to it must be done in two steps. BEARS will not recognize the newly-created group in the system until the change is processed.
- Multiple adjustment groups can be created at the same time.
- Adjustment groups cannot be deleted; they can only be disabled.
- Adjustment groups cannot be renamed. If you don't like the name of an adjustment group, you can disable it and create a new one.
- All adjustments in a group must be at the Central Office step in the workflow before they can be endorsed to the F&A step in the workflow. If some adjustments are at the Delegate step, endorse (send) them all to the Central Office step first. Then you can endorse them all to F&A.
- Keep a log of the BDEEND Adjustment Group number (similar to the Adjustment Number) to search for a read-only view of the budget request as it was submitted.

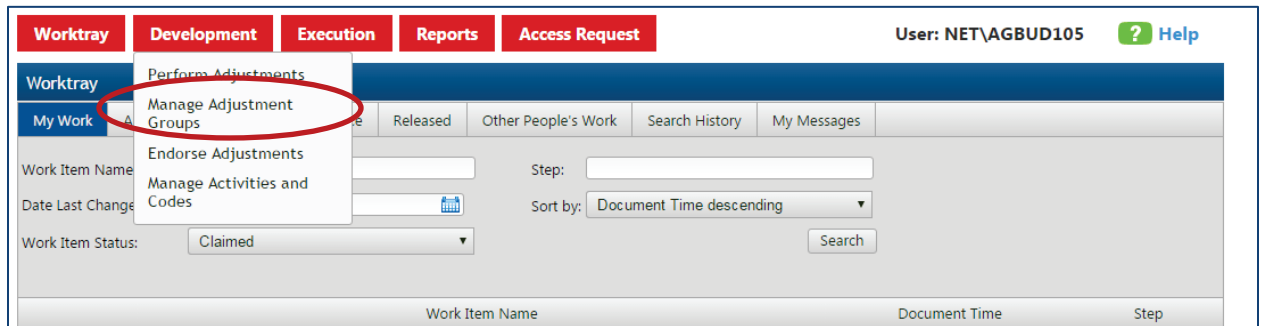
# BEARS Adjustment Groups

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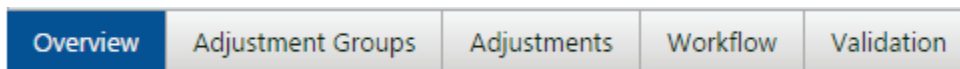
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## How Do You Create An Adjustment Group?

1. Under the **Development** tab, click **Manage Adjustment Groups (BDEMAG)**. **Make sure your pop-up blocker is turned off.**



On the **Overview** tab:



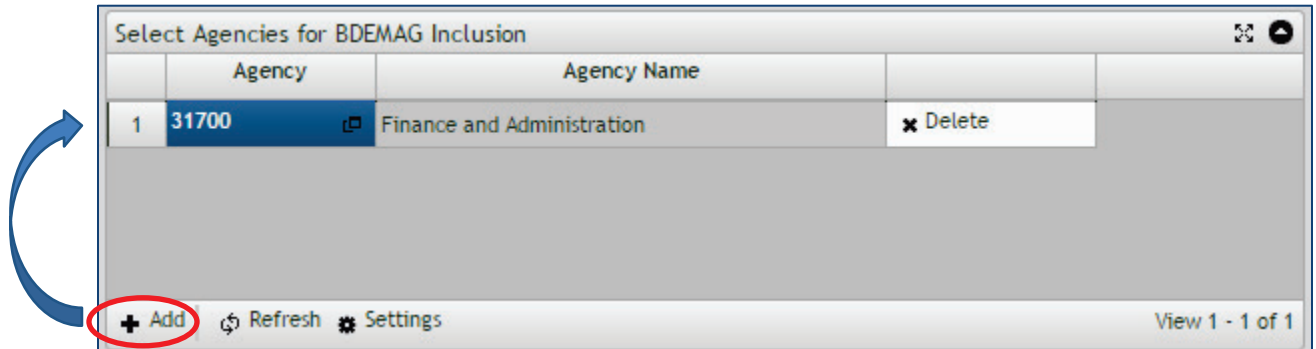
2. Select the Budget Year from the drop-down menu. For the FY18 Budget Request, select "FY2018".
3. Enter a Description. The description should be the action you will be completing with this group, e.g. "Creating [Agency] FY18 Budget Request".

*Note: This description will not be the title of the group. The title will be entered in step #9. This description will appear in the worktray.*

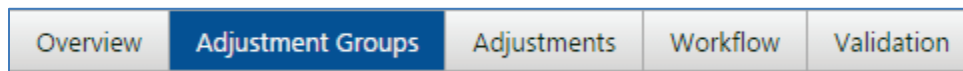
The screenshot shows the 'BDEMAG - Start' form. At the top, there are three buttons: 'Save', 'Validate', and 'Submit'. Below these are navigation tabs: Overview, Adjustment Groups, Adjustments, Workflow, and Validation. The 'Overview' tab is selected. The form fields are:
 

- Budget Year:** A dropdown menu showing 'FY2017'.
- Description:** A text input field containing 'Creating 31700 FY17 Budget Request'.
- Include All Agencies:** An unchecked checkbox.

- On the first grid, select **+Add** to insert a blank row.
- Choose your agency from the pop-up window.

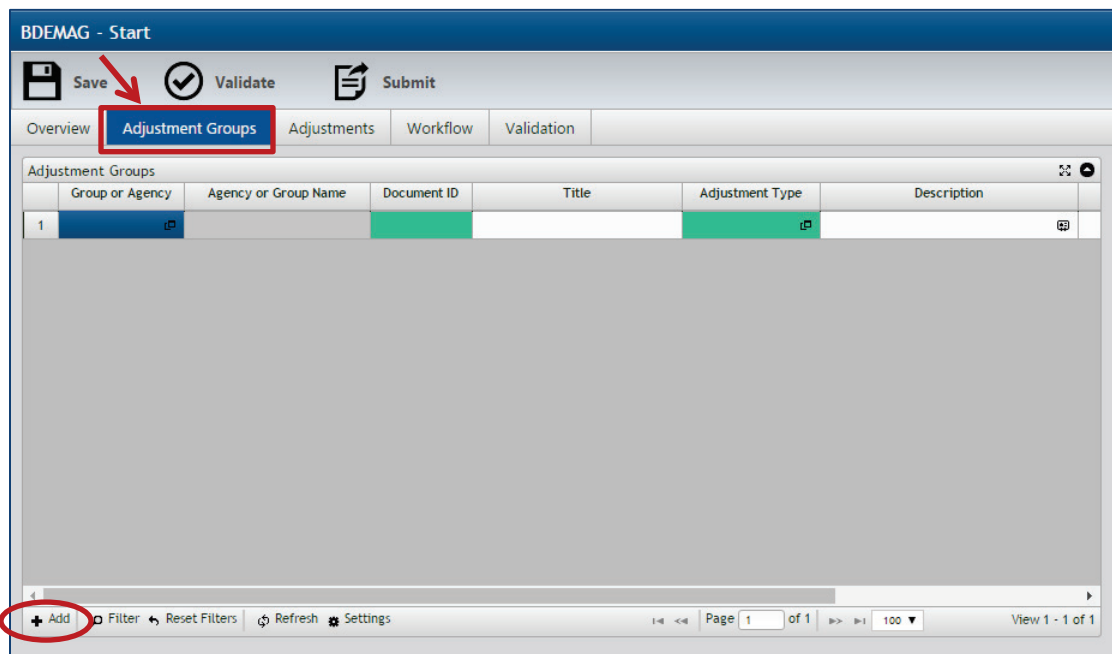


- You don't need to choose an adjustment classification or load adjustments to create groups, so move directly to the **Adjustment Groups** tab.



- Click **+Add** at the bottom left corner to add a blank row.

*Note: The green fields will auto-populate and are not editable.*



- Click in the “Group or Agency” cell to select your agency. The column “Agency or Group Name” will populate automatically.



- Enter a title for the group.

*Note: For your FY18 Budget Request, please use the title: “XXXXX FY18 Budget Request”, where XXXXX is the department ID.*

Adjustment Groups						
	Group or Agency	Agency or Group Name	Document ID	Title	Adjustment Type	Description
1	31700	Finance and Administration		31700 FY17 Budget Request	Parent Adjustmen...	Submitting F&A's FY17 Budget Request.

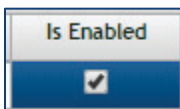
- Enter a description for the adjustment group.

- Select the appropriate phase.

*Note: The phase corresponds to the step in the budget process.*

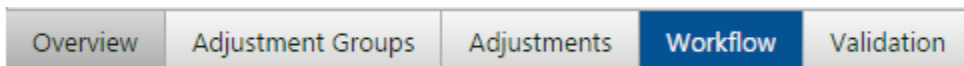
Phase	Description
Appropriation	Work Program Phase
Budget Request	Budget Request Phase
Recommended	Final Governor’s Recommended Budget

- Make sure to check the box in the “Is Enabled” column. This will activate the group.



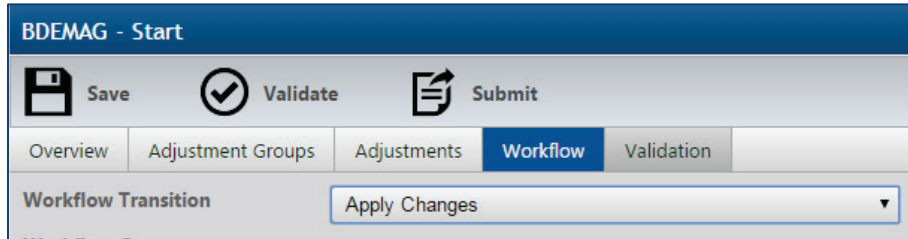
*Note: If you wish to disable the group later (after it has been enabled and processed in BEARS), simply uncheck the box and apply changes again.*

- Skip the **Adjustments** tab and go directly to your **Workflow** tab.



14. For Workflow Transition, select **Apply Changes**.

*Note: You will need to process the creation of the group before you can link any adjustments to it. Until it is processed, the group technically does not exist in BEARS.*



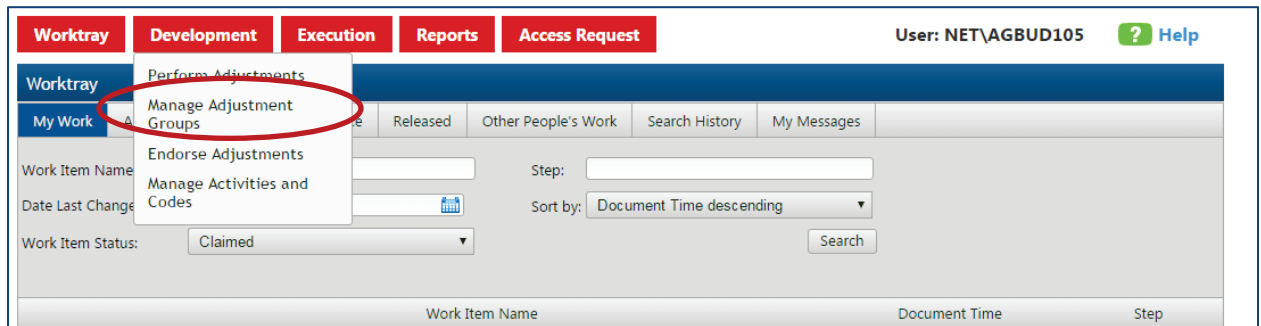
15. Press **Validate**. Then **Submit** when all of the validation checks are successful.



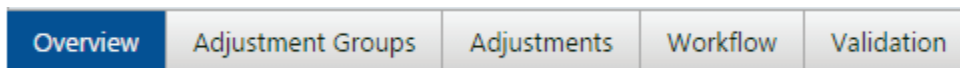
## How Do You Assign Adjustments to Groups?

Now that an adjustment group has been created, you are able to assign individual adjustments to it.

1. Under the **Development** tab, click **Manage Adjustment Groups (BDEMAG)**. **Make sure your pop-up blocker is turned off.**



On the **Overview** tab:



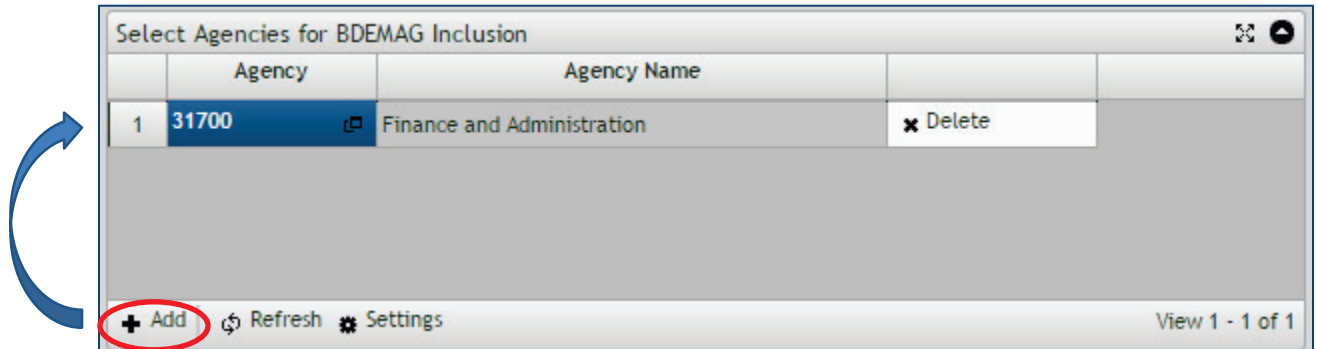
2. Select the Budget Year from the drop-down menu. For the FY18 Budget Request, select FY2018.
3. Enter a Description. The description should be the action you will be completing with this group, i.e. "Assigning BR Adjustments to a Group", or "Grouping Work Program Adjustments".

*Note: This description will not be the title of the group. This description will appear in the worktray.*

The screenshot shows the 'BDEMAG - Start' form. At the top, there are three buttons: 'Save', 'Validate', and 'Submit'. Below the buttons, there are navigation tabs: 'Overview', 'Adjustment Groups', 'Adjustments', 'Workflow', and 'Validation'. The 'Overview' tab is selected. The form contains the following fields:

- Budget Year:** A dropdown menu with 'FY2017' selected and an information icon.
- Description:** A text input field containing 'Assigning 31700 BR Adjustments to a Group'.
- Include All Agencies:** A checkbox that is unchecked, with an information icon.

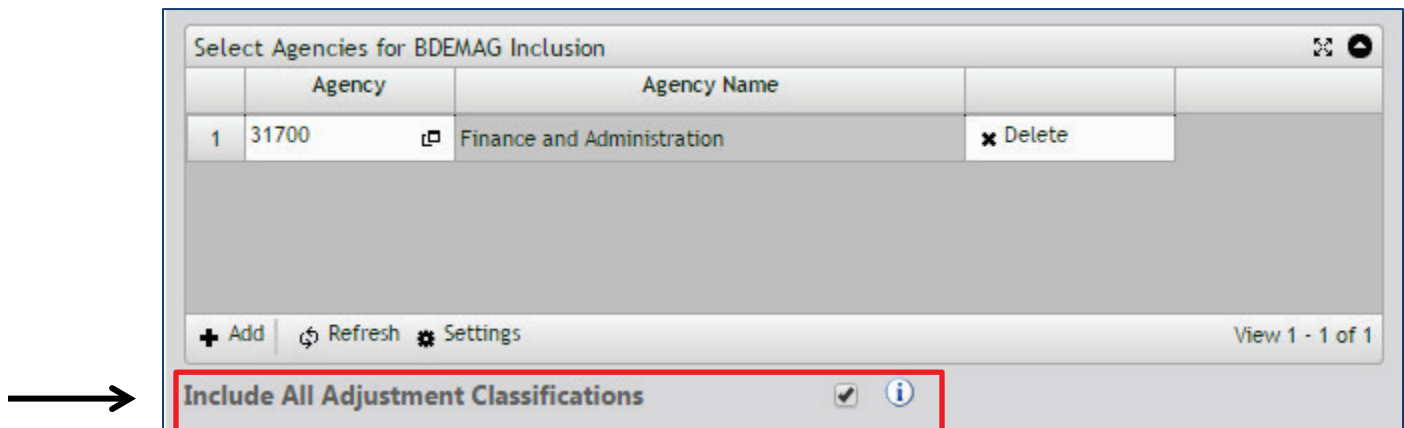
4. On the first grid, select **+Add** to insert a blank row.
5. Choose your agency from the pop-up window.



6. Underneath the first grid, check the box next to “Include All Adjustment Classifications”.

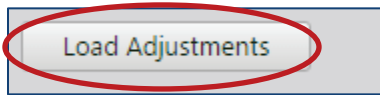
*Note: This will bring up all adjustments for the selected agency, regardless of the classification type.*

EXAMPLE: A budget request can include many different adjustment classification types, including cost increases, reductions, and/or base adjustments.

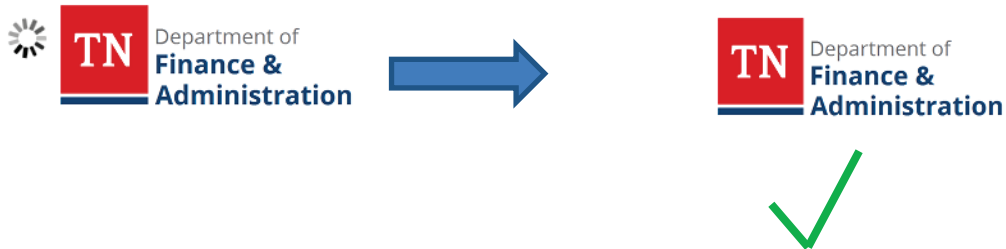




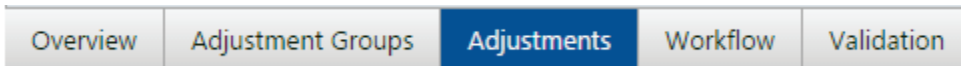
7. Click **Load Adjustments**.



8. BEARS will begin to load your agency's adjustments. This may take a few minutes, especially for agencies with a large number of adjustments.



9. Once the spinner disappears, you may move to the **Adjustments** tab in BEARS.



*Note: All adjustments that have been created for your agency should be visible in the grid, regardless of their availability in the workflow.*

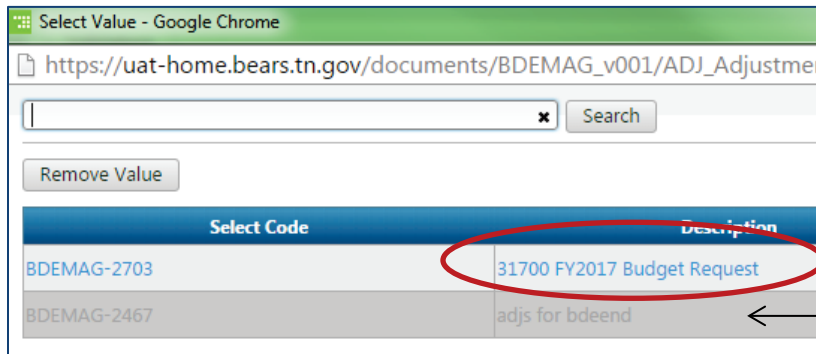
Adjustments							
	Agency	Group Name	Agency Name	Document ID	Title	Adjustment Type	Adjustment Group
1	31700	General Government	Finance and Administration	BDEADJ-2660	Reorganization - Transfer Functions	Reorganization	BDEMAG-2703
2	31700	General Government	Finance and Administration	BDEADJ-2667	Cost Increase - Legal Counseling Po	Cost Increase	BDEMAG-2703
3	31700	General Government	Finance and Administration	BDEADJ-2696	31702 - Allocate Activities	Activity Allocati...	BDEMAG-2703
4	31700	General Government	Finance and Administration	BDEADJ-2697	Reduce Operational Expenditures	Base Budget Re...	BDEMAG-2703
5	31700	General Government	Finance and Administration	BDEADJ-2722	Establish New Legal Positions	Cost Increase	BDEMAG-2703

Filter Reset Filters Refresh Settings Page 1 of 1 100 View 1 - 5 of 5

*Note: The gray boxes cannot be edited.*

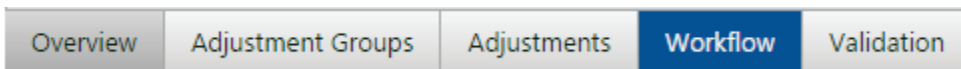
10. Click in the “Adjustment Group” cell to select your desired group for that adjustment.

*Note: The “Ungrouped” adjustment group serves as a “catch-all” for all adjustments that are not assigned to another group.*



The grayed-out group has been disabled, therefore it cannot be chosen.

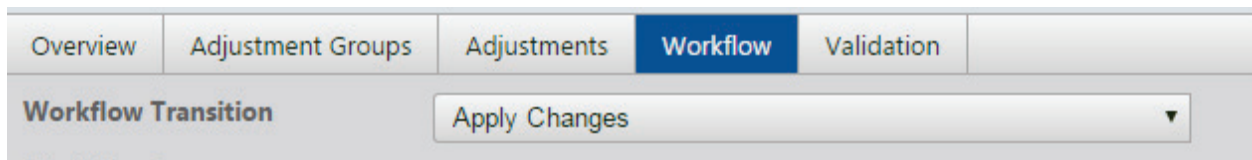
11. Once all of your adjustments have been grouped, proceed to the **Workflow** tab.



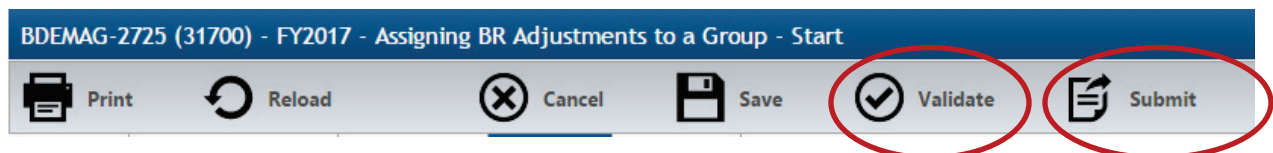
*Note: Remember the Adjustment Group number; this will be important for sending your group up and down the workflow.*

Agency	Group Name	Agency Name	Document ID	Title	Adjustment Type	Adjustment Group
1 31700	General Government	Finance and Administration	BDEADJ-2660	Reorganization - Transfer Functions	Reorganization	BDEMAG-2703
2 31700	General Government	Finance and Administration	BDEADJ-2667	Cost Increase - Legal Counseling Po	Cost Increase	BDEMAG-2703
3 31700	General Government	Finance and Administration	BDEADJ-2696	31702 - Allocate Activities	Activity Allocati...	BDEMAG-2703
4 31700	General Government	Finance and Administration	BDEADJ-2697	Reduce Operational Expenditures	Base Budget Re...	BDEMAG-2703

12. For Workflow Transition, select **Apply Changes**.



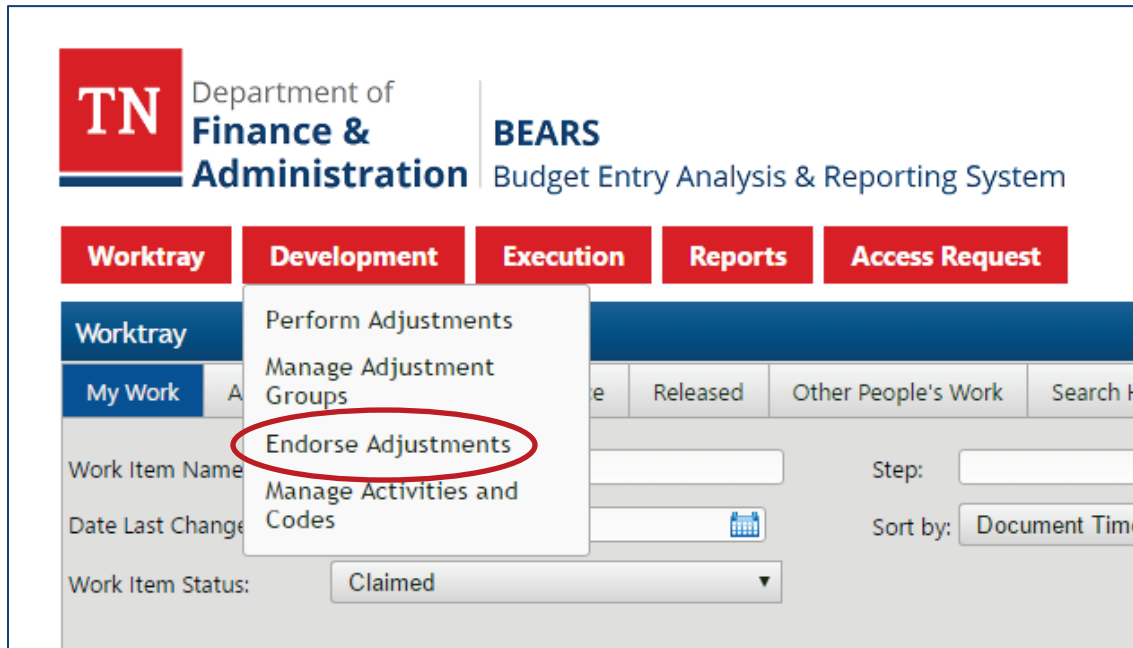
13. **Validate and Submit.**



## How Do You Submit Your Budget Request to F&A?

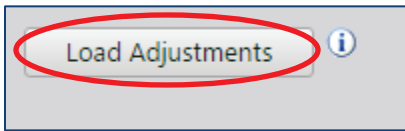
Once Agency Approvers have entered and/or reviewed all adjustments and assigned those adjustments to a group for their budget request, BEARS allows all adjustments to be sent to your F&A Budget Analyst in one step. This process is called “Endorsing an Adjustment Group”.

1. Under the **Development** tab, select **Endorse Adjustments (BDEEND)**.

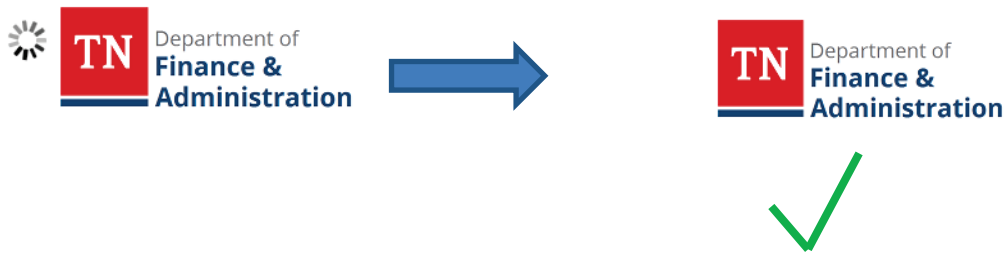


2. On the **Overview** tab of the Endorse Adjustments screen, select the Budget Year and enter a Description. The description entered will be the title that appears in the worktray.

- Once you have entered a description click the **Load Adjustments** button.

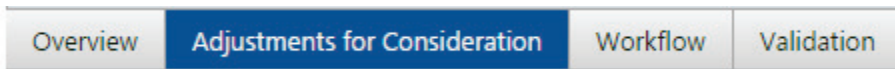


BEARS will begin to load your agency's adjustment groups. This may take a few minutes, especially for agencies with a large number of adjustments. Once the spinner disappears, you may move to the **Adjustments for Consideration** tab in BEARS.

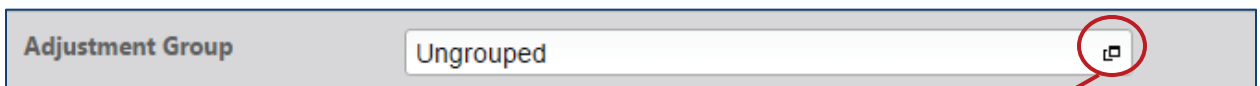


*Note: **Load Adjustments** will load every adjustment that is available at your security level, regardless of who created the adjustment or which step in the workflow the adjustment sits.*

- When the adjustments have loaded, move to the **Adjustments for Consideration** tab.



On this tab you will be able to filter by the groups that you have created (see page 3 for more information on how to create groups).



Will open a pop-up with a listing of every group that was created for your agency.

- To move forward in the process of submitting your budget request, select the “[Agency] FYXX Budget Request” group. This will load only the adjustments in that group.

Select Code	Description
Ungrouped	Ungrouped
31700 FY17 Budget Request	Submitting F&A's FY17 Budget Request

*Note: If an adjustment is claimed by another user, that adjustment will be highlighted in red. You will be unable to submit the group to F&A if any adjustment is claimed.*

- Any adjustment within the group can be viewed before you submit. Simply click on the **View** button.

Adjustments						
	*	Group Code	Agency	Document ID	Claimed By	Title
1	<input type="button" value="View"/>	G1	31700	BDEADJ-3354	Unclaimed	Cost Increase - Example Adjustment
2	<input type="button" value="View"/>	G1	31700	BDEADJ-3355	Unclaimed	Reduction - Example Adjustment
3	<input type="button" value="View"/>	G1	31700	BDEADJ-3356	Unclaimed	Reorganization -- Example Adjustment



**BDEADJ-3354 (31700) - Cost Increase - Example Adjustment (Cost Increase) - Central Office**

✕ Cancel

**Overview**

Expenditures

Revenues

Positions

Workflow

Validation

**Budget Year** FY2017 ▼ **Agency** 31700 🔒 Finance and Administration

**Adjustment Classification** Cost Increase 🔒

**Adjustment Name** Cost Increase - Example Adjustment

**Description** Cost Increase - Example Adjustment

*Note: This will be a read-only file. If edits need to be made to a particular adjustment you must make those changes through the Perform Adjustments (BDEADJ) module. See the training guide **BEARS: Entering Adjustments** for more detail.*

7. To submit your group, you must choose which workflow step you want to send it to. This is done through the Group Action drop-down menu.

The screenshot shows the 'Adjustment Group' form for '31700 FY17 Budget Request'. The 'Group Action' dropdown menu is open, showing options: '-- Please Select --', 'Delegate', 'Central Office', and 'F&A'. The 'F&A' option is circled in red. Below the dropdown is a table of adjustments.

	*	Group Code	Agency	Document ID	Claimed By	Title
1	View	G1	31700	BDEADJ-3354	Unclaimed	Cost Increase - Example Adjustm

*Note: All adjustments must be at the "Central Office" workflow step before they can be endorsed to the "F&A" workflow step. If you have some adjustments at the "Delegate" step, first endorse (send) the group to the "Central Office". Once the adjustment group has been endorsed to "Central Office", you can then send it to "F&A".*

8. The group action that is selected will appear in the "Action" column of the grid.

The screenshot shows the 'Adjustment Group' form for '31700 FY17 Budget Request'. The 'Group Action' dropdown is set to 'F&A'. Below it is a table of adjustments with an 'Action' column.

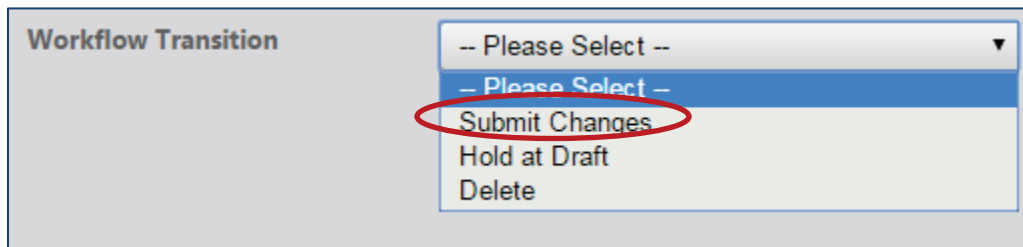
	*	Group Code	Agency	Document ID	Claimed By	Title	Action	Status
1	View	G1	31700	BDEADJ-3354	Unclaimed	Cost Increase - Example Adjustment	F&A	Pending
2	View	G1	31700	BDEADJ-3355	Unclaimed	Reduction - Example Adjustment	F&A	Pending
3	View	G1	31700	BDEADJ-3356	Unclaimed	Reorganization -- Example Adjustment	F&A	Pending

9. Once you have chosen your desired workflow step, move to the **Workflow** tab.

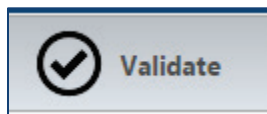
The screenshot shows a navigation bar with four tabs: 'Overview', 'Adjustments for Consideration', 'Workflow', and 'Validation'. The 'Workflow' tab is highlighted in blue, indicating it is the active tab.

10. Select your desired workflow transition.

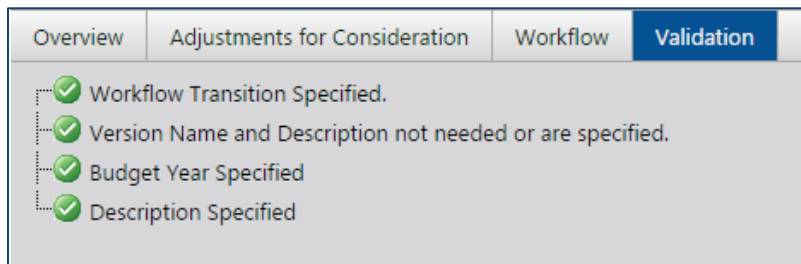
- **Submit Changes** – Endorses (sends) the group to the workflow step that was selected in the Adjustments for Consideration tab.
- **Hold at Draft** – Holds the adjustment at the draft stage.
- **Delete** – Deletes the endorsement. This will not delete the adjustment group or any of the individual adjustments contained in the group.



11. Click **Validate**.



The **Validation** tab will show green checks (✔) if everything is correct or red X's (✘) if there are any errors. All errors will need to be fixed before clicking **Submit**.



12. When your endorsed adjustment has validated, click **Submit**.



Remember to record the BDEEND number assigned upon submission for future reference.

