BEARS Position Inventory

This lesson will provide a conceptual overview of the Position Inventory (BEXPOS) module in the BEARS system.

Key Notes:

- With the old Microsoft Access Budget Request system, agencies were asked to submit an Excel file containing all departmental personnel information, known as the "Personnel File". This file was used to confirm funding availability for payroll for all state employees.
- With BEARS, the confirmation of funding for all employees will take place in the Position Inventory module.
- The Personnel File was only updated once each year, however the Position Inventory allows for the *ongoing* monitoring and updating of personnel information throughout the entire fiscal year process.
- The Position Inventory provides a comparison between three data sources: BEARS (Position Inventory), Edison, and the Budget.
- <u>The Position Inventory module is not directly linked with Edison.</u> Adjustments to personnel will need to be done through Edison and DOHR for official changes.
- <u>The Positon Inventory module and the Perform Adjustments module (the Budget) are not directly linked.</u> Adjustments with positions that are submitted in the Perform Adjustments module will need to be done as additional adjustments in the Position Inventory module for those positions to appear in the BEARS Position Inventory data.
- If you are requesting position changes/additions/reductions in your Budget Request, please do not create those adjustments in the Position Inventory until those changes have been approved and included in the Governor's Recommended Budget.
- Once those Budget Request adjustments are approved, you can make those changes in the Position Inventory to check that those adjustments are completed in Edison.
- There are five types of adjustments that you can make in the Position Inventory module:
  - ***Change****: Changes detailed information attached to a position, e.g. salary, insurance type, retirement rate, etc.*
  - ***Move****: Moves a position to another agency, allotment code, or activity.*
  - ***Abolish****: Abolishes a position in the BEARS Position Inventory. This position will remain in the Position Inventory until it is abolished and removed from Edison.*
  - ***Reinstate****: Reestablishes a position that has been marked for abolishment in the Position Inventory. This will only work if the position has not been abolished in Edison.*
  - ***New****: Creates a new position in the Position Inventory that has not yet been created in Edison. For example, if ten new positions are approved in the budget, creating a similar adjustment in the BEARS Position Inventory gives an agency a better idea of their salary and benefits costs before Edison updates with that new position information.*
  - ***Copy from EDISON****:* Copies the current EDISON data over the position.

- You will no longer have to provide a deliverable document with your budget request submission. You only need to confirm within the Position Inventory that 1) the authorized position count is greater than the established position count and 2) the payroll budget can adequately fund all personnel for a full fiscal year.
- While overlaps were accounted for in the personnel file, they do not appear in the BEARS Position Inventory. Since overlaps are meant to be temporary, they are not typically included in the equity calculation, however, please keep overlaps in mind when determining adequate funding availability.
- Before any adjustments are created and approved in the Position Inventory, the Position Inventory will equal the data in Edison. Once adjustments are created and approved in the Position Inventory, those data sets may be different.
- The Position Inventory works as a great tool for opening up dialogue between an agency and F&A Division of Budget. Since each user can see the same data in the Position Inventory module, there is ample opportunity for back-and-forth communication to discuss any issues.

BEARS Position Inventory

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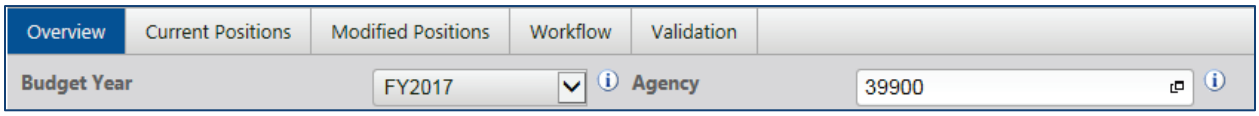
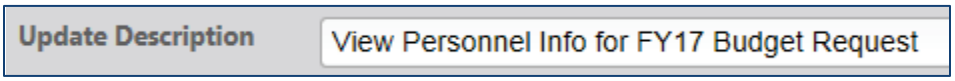
How Do You View Your Agency's Data in the Position Inventory?

1. Go to the **Execution** tab and select **Position Inventory.**

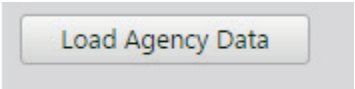
2. On the **Overview** tab of the Position Inventory, select the budget year and agency. Select the year in which you are currently operating. This will be one FY behind the Budget Request FY.



3. Enter a brief description of the update you will be making. *Note: The description entered into this field will be displayed in the worktray.*



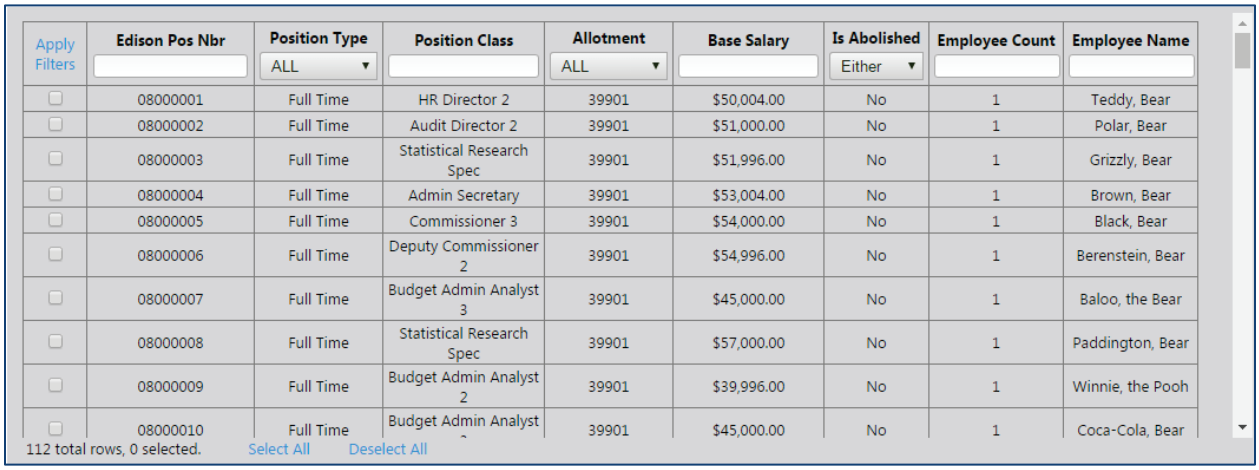
4. Once you have entered your description, click the **Load Agency Data** button to load your agency's position data.



5. BEARS will begin to load your agency's position data. Once the spinner disappears and the page refreshes, you may move to the **Current Positions** tab in BEARS.

6. The Current Positions tab consists of three grids: Agency Positions, Recommended and Established Positions, and Total Budget.

The top grid lists all positions within the selected agency, sorted by the Edison Position Number. From this grid, you can select positions to edit.

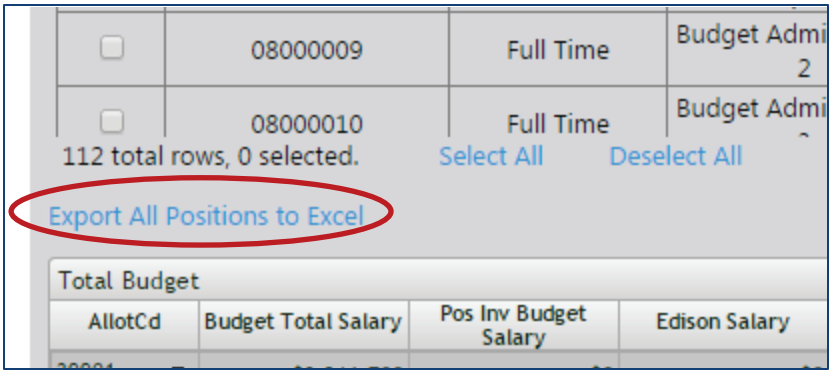


Apply Filters	Edison Pos Nbr	Position Type	Position Class	Allotment	Base Salary	Is Abolished	Employee Count	Employee Name
		ALL		ALL		Either		
	08000001	Full Time	HR Director 2	39901	$50,004.00	No	1	Teddy, Bear
	08000002	Full Time	Audit Director 2	39901	$51,000.00	No	1	Polar, Bear
	08000003	Full Time	Statistical Research Spec	39901	$51,996.00	No	1	Grizzly, Bear
	08000004	Full Time	Admin Secretary	39901	$53,004.00	No	1	Brown, Bear
	08000005	Full Time	Commissioner 3	39901	$54,000.00	No	1	Black, Bear
	08000006	Full Time	Deputy Commissioner 2	39901	$54,996.00	No	1	Berenstein, Bear
	08000007	Full Time	Budget Admin Analyst 3	39901	$45,000.00	No	1	Baloo, the Bear
	08000008	Full Time	Statistical Research Spec	39901	$57,000.00	No	1	Paddington, Bear
	08000009	Full Time	Budget Admin Analyst 2	39901	$39,996.00	No	1	Winnie, the Pooh
	08000010	Full Time	Budget Admin Analyst	39901	$45,000.00	No	1	Coca-Cola, Bear

112 total rows, 0 selected. Select All Deselect All

Note: The Agency Positions grid shows a maximum of 1,000 positions per page.

Note: To export all data from this grid (along with additional data that does not appear in this grid, including Edison values), please select the ***Export All Positions to Excel*** *button.*



2

The middle grid is "Established and Recommended Positions." This grid gives a comparison of position counts and is broken down by allotment code and class code. Variances between recommended and established positions will be highlighted in red.

Established and Recommended Positions

AllotCd	Class Code	Class Name	Recommended Full Time Positions	Recommended Part Time Positions	Recommended Seasonal Positions	Established Full Time Positions	Established Part Time Positions	Established Seasonal Positions
39901	002322	Student Intern	1	0	0	1	0	0
39901	002943	Admin Secretary	1	0	0	1	0	0
39901	073121	Admin Assistant 1	1	0	0	1	0	0
39901	073122	Admin Assistant 2	1	0	0	1	0	0
39901	073162	Admin Services Assistant 2*	1	0	0	1	0	0
39901	073163	Admin Services Assistant 3	1	0	0	1	0	0
39901	073164	Admin Services Assistant 5	1	0	0	1	0	0
39901	073166	Admin Services Assistant 4	2	0	0	2	0	0
			112	0	0	112	0	0

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Recommended Full Time Positions	The total number of full-time positions in the Position Inventory, broken down by class code.
Recommended Part Time Positions	The total number of part-time positions in the Position Inventory, broken down by class code.
Recommended Seasonal Positions	The total number of seasonal positions in the Position Inventory, broken down by class code.
Established Full Time Positions	The total number of full-time positions established in Edison, broken down by class code.
Established Part Time Positions	The total number of part-time positions established in Edison, broken down by class code.
Established Seasonal Positions	The total number of seasonal positions established in Edison, broken down by class code.

3 The “Total Budget” grid gives a comparison by allotment code of the Budget, BEARS Position Inventory, and Edison.

Total Budget

AllotCd	Budget Total Salary	Pos Inv Budget Salary	Edison Salary	Difference Salary	Budget Total Benefits	Pos Inv Budget Benefits	Edison Benefits	Difference Benefits	Budget Total Positions	Edi
39901	$3,216,700	$2,912,988	$2,912,988	$303,712	$1,105,900	$1,033,695	$1,035,212	$72,205	45	
39902	$3,447,800	$2,916,960	$2,916,960	$530,840	$1,248,200	$1,132,836	$1,137,245	$115,364	50	
39903	$533,100	$1,107,996	$1,107,996	$-574,896	$213,500	$306,599	$306,668	$-93,099	8	
39904	$500,100	$384,996	$384,996	$115,104	$197,600	$135,081	$134,990	$62,519	7	
	$7,697,700	$7,322,940	$7,322,940	$374,760	$2,765,200	$2,608,210	$2,614,115	$156,990	110	

Refresh Settings View 1 - 4 of 4

Budget Total Salary	The total amount budgeted in 70100 (Salaries) by allotment code. For your Budget Request, this number will tie to your baseline (Recurring Work Program).
Pos Inv Budget Salary	The total cost to fund all 70100 (Salaries) in the Position Inventory by allotment code.
Edison Salary	The total cost to fund all 70100 (Salaries) in Edison by allotment code.
Difference Salary	The difference between Position Inventory Budget Salary (70100) and Budget Total Salary (70100), broken down by allotment code.
Budget Total Benefits	The total amount budgeted in 70200 (Benefits) by allotment code. For your Budget Request, this number will tie to your baseline (Recurring Work Program).
Pos Inv Budget Benefits	The total cost to fund all 70200 (Benefits) in the Position Inventory by allotment code.
Edison Benefits	The total cost to fund all 70200 (Benefits) in Edison by allotment code.
Difference Benefits	The difference between Position Inventory Budget Benefits (70200) and Budget Total Benefits (70200), broken down by allotment code.
Budget Total Positions	The total number of positions approved by the Governor in the recommended budget. For your Budget Request, this number will tie to your baseline (Recurring Work Program).
Pos Inv Budget Postions	The total number of positions in BEARS position inventory. Any new positions or positions marked for abolishment will affect this count.
Edison Positions	The total number of positions established in Edison by allotment code.
Differences Positions	The difference between Position Inventory Budget Positions and Budget Total Positions.

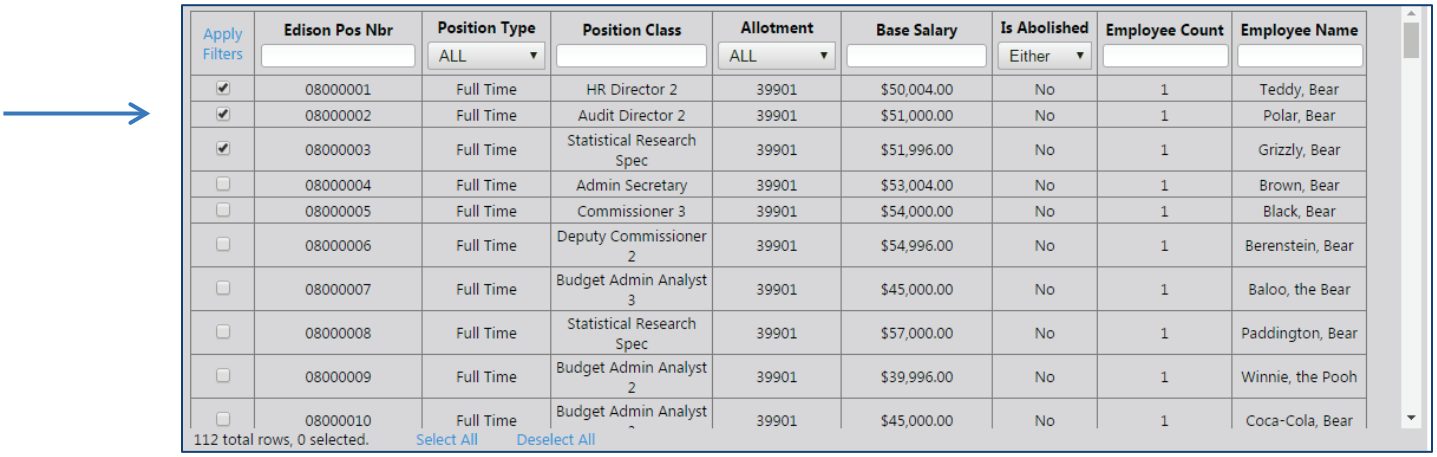
How Do You Modify Positions in the Position Inventory?

In order to modify positions in the Position Inventory data set, you must first select positions in the **Current Positions** tab and move them over to the **Modified Positions** tab. You will make the actual changes in the **Modified Positions** tab and then submit those changes through the workflow.

A) Selecting Positions to Modify

The data on the **Current Positions** tab cannot be edited. In order to edit a position, you must first select it on the **Current Positions** tab and move it to the **Modified Positions** tab.

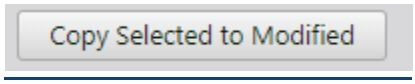
1. On the top grid, Agency Positions, select positions for modification by checking the box in the far left column.



Apply Filters	Edison Pos Nbr	Position Type	Position Class	Allotment	Base Salary	Is Abolished	Employee Count	Employee Name
		ALL		ALL		Either		
☑	08000001	Full Time	HR Director 2	39901	$50,004.00	No	1	Teddy, Bear
☑	08000002	Full Time	Audit Director 2	39901	$51,000.00	No	1	Polar, Bear
☑	08000003	Full Time	Statistical Research Spec	39901	$51,996.00	No	1	Grizzly, Bear
☐	08000004	Full Time	Admin Secretary	39901	$53,004.00	No	1	Brown, Bear
☐	08000005	Full Time	Commissioner 3	39901	$54,000.00	No	1	Black, Bear
☐	08000006	Full Time	Deputy Commissioner 2	39901	$54,996.00	No	1	Berenstein, Bear
☐	08000007	Full Time	Budget Admin Analyst 3	39901	$45,000.00	No	1	Baloo, the Bear
☐	08000008	Full Time	Statistical Research Spec	39901	$57,000.00	No	1	Paddington, Bear
☐	08000009	Full Time	Budget Admin Analyst 2	39901	$39,996.00	No	1	Winnie, the Pooh
☐	08000010	Full Time	Budget Admin Analyst	39901	$45,000.00	No	1	Coca-Cola, Bear

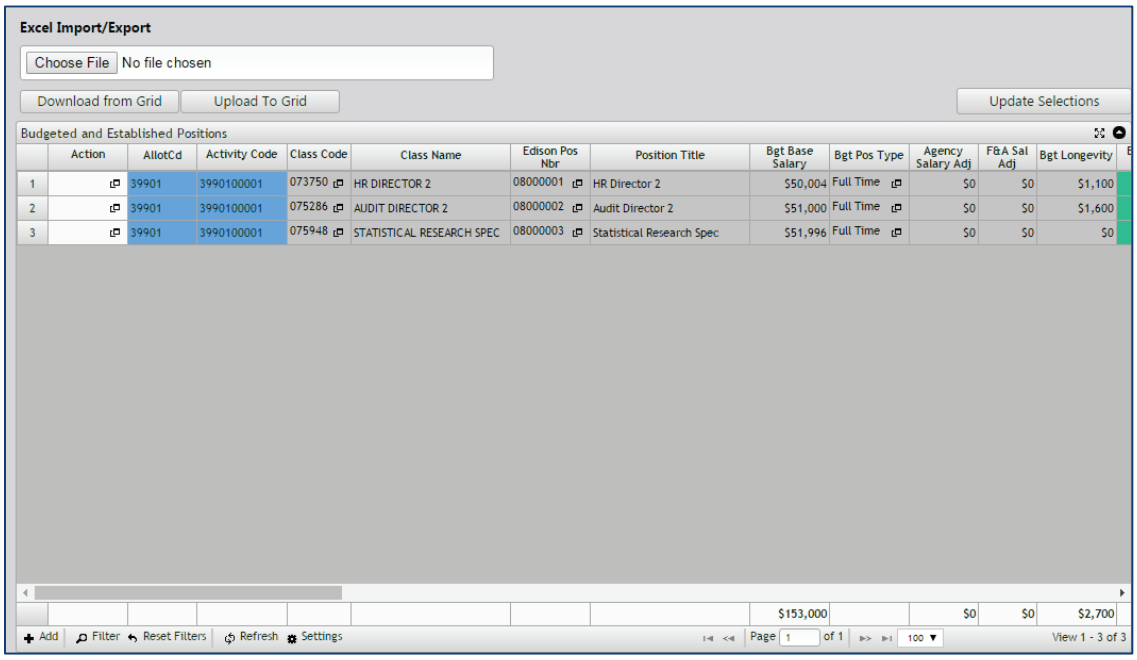
112 total rows, 0 selected. Select All Deselect All

2. Once you have chosen positions to edit, click the **Copy Selected to Modified** button.



3. Now move to the **Modified Positions** tab.

4. All of the positions you selected on the **Current Positions** tab will now appear on the **Modified Positions** tab.



B) Filtering Positions in the **Current Positions** Tab

You will have the ability to filter by each of the columns in the grid. Positon Inventory also allows you to filter by a combination of several columns.

Each filter requires a specific type of entry into the field to pull the desired results.
Note: Hovering over the white field will give details on the type of entry required for each field.

Edison Pos Nbr	Enter part of any term to match.
Position Type ALL	Select value from drop-down list. Only values present for your agency will appear.
Position Class	Enter part of any term to match.
Allotment ALL	Select value from drop-down list.
Base Salary	Enter one of the following operators followed by the desired value: [=] value must exactly equal [<>] value must not equal [>] greater than [<] less than [>=] greater than or equal [<=] less than or equal [~] approximately (within 5%)
Is Abolished Either	Select value from drop-down list.
Employee Count	Enter one of the following operators followed by the desired value: [=] value must exactly equal [<>] value must not equal [>] greater than [<] less than [>=] greater than or equal [<=] less than or equal [~] approximately (within 5%)
Employee Name	Enter part of any term to match.

2. After you have entered the desired values into the filters, you will need to click the **Apply Filters** button.

Apply Filters	Edison Pos Nbr	Position Type	Position Class	Allotment	Base Salary	Is Abolished	Employee Count	Employee Name
		Full Time		39902	>50000	No		
	08000001	Full Time	HR Director 2	39901	$50,004.00	No	1	Teddy, Bear
	08000002	Full Time	Audit Director 2	39901	$51,000.00	No	1	Polar, Bear
	08000003	Full Time	Statistical Research Spec	39901	$51,996.00	No	1	Grizzly, Bear
	08000004	Full Time	Admin Secretary	39901	$53,004.00	No	1	Brown, Bear
	08000005	Full Time	Commissioner 3	39901	$54,000.00	No	1	Black, Bear
	08000006	Full Time	Deputy Commissioner 2	39901	$54,996.00	No	1	Berenstein, Bear
	08000008	Full Time	Statistical Research Spec	39901	$57,000.00	No	1	Paddington, Bear
	08000011	Full Time	Programmer/Analyst 3	39901	$60,000.00	No	1	Fozzie, Bear
	08000012	Full Time	Information Officer	39901	$60,996.00	No	1	Ted, Bear
	08000016	Full Time	Statistical Research Spec	39901	$65,004.00	No	2	Boo Boo, Bear
	08000017	Full Time	Information Systems	39901	$66,000.00	No	1	Koala, Bear

112 total rows, 0 selected. Select All Deselect All

Once the filter is applied you will see that only the positons fitting the desired filters appear in the grid.

Apply Filters	Edison Pos Nbr	Position Type	Position Class	Allotment	Base Salary	Is Abolished	Employee Count	Employee Name
		Full Time		39902	>50000	No		
	08000049	Full Time	Loan Officer 2	39902	$98,004.00	No	1	Bungle, Bear
	08000050	Full Time	Admin Assistant 1	39902	$99,000.00	No	1	Buttons, the Bear
	08000056	Full Time	Assistant Commissioner 2	39902	$105,000.00	No	1	Barney, Bear

3. Once you have applied your filter, you have the option to click the **Select All** button to select all items that are part of the applied filter.

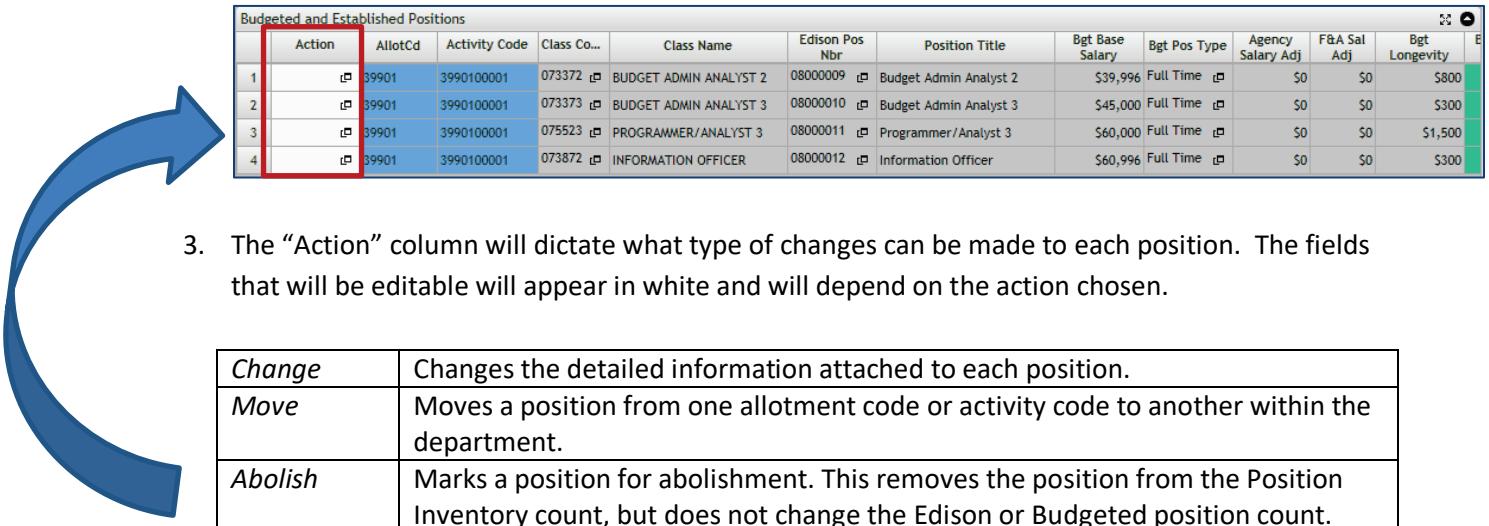
4. You have to ability to run multiple filters and make various selections before moving to the **Modified Positions** tab. To change a filter you simply modify what you have in those filter fields and click the **Apply Filters** button again. To reset all filters, select the **Clear Filters** button under the grid.

*Note: Resetting or changing a filter will NOT deselect positions that you want to modify. You must manually deselect each position separately, or click the **Deselect All** button.*

C) Modifying Positions in the **Modified Positions** Tab

1. Once you have selected the positions you wish to edit in the **Current Positions** tab, move to the **Modified Positions** tab.

2. The **Modified Positions** tab will have the same "Budgeted and Established Positions" grid as the **Current Positions** tab; however, it will only contain the positions you have marked for edit.



Budgeted and Established Positions

	Action	AllotCd	Activity Code	Class Co...	Class Name	Edison Pos Nbr	Position Title	Bgt Base Salary	Bgt Pos Type	Agency Salary Adj	F&A Sal Adj	Bgt Longevity
1		39901	3990100001	073372	BUDGET ADMIN ANALYST 2	08000009	Budget Admin Analyst 2	$39,996	Full Time	$0	$0	$800
2		39901	3990100001	073373	BUDGET ADMIN ANALYST 3	08000010	Budget Admin Analyst 3	$45,000	Full Time	$0	$0	$300
3		39901	3990100001	075523	PROGRAMMER/ANALYST 3	08000011	Programmer/Analyst 3	$60,000	Full Time	$0	$0	$1,500
4		39901	3990100001	073872	INFORMATION OFFICER	08000012	Information Officer	$60,996	Full Time	$0	$0	$300

3. The "Action" column will dictate what type of changes can be made to each position. The fields that will be editable will appear in white and will depend on the action chosen.

Change	Changes the detailed information attached to each position.
Move	Moves a position from one allotment code or activity code to another within the department.
Abolish	Marks a position for abolishment. This removes the position from the Position Inventory count, but does not change the Edison or Budgeted position count.
Reinstate	Reinstates a position that has been abolished in BEARS Position Inventory but had not been abolished in Edison or in the Budget.
Copy to EDISON	Copies the current EDISON data over the position.

Note: The Position Inventory module is not connected to the Perform Adjustment module. ***Adjustments made in the Position Inventory DO NOT count as cost increases, reductions, reorganizations, etc.***

The Position Inventory module does not send information to Edison or DOHR. ***Adjustments made in the Position Inventory DO NOT affect the data in Edison.***

1) Change

1. To make a change to a position, choose **Change** from the drop-down box under the "Action" column.

Select Code	Description
Change	Make changes to the existing position
Move	Moves a position to a new allotment, activity or agency
Abolish	Abolishes a given position
Reinstate	Reinstates an abolished position to your inventory
Copy EDISON	Copies the current EDISON data over the position

2. Once **Change** is selected, the following columns will turn white and can be edited as needed:

   Class Code; Edison Pos Nbr; Bgt Base Salary; Bgt Pos Type; Agency Salary Adj; Bgt Longevity; Budget Ins Covg; Bgt Ret Plan; GF State%; Ded State%; Federal Rev%; Other Rev%; and Edison EE ID.

Budgeted and Established Positions

	Action	AllotCd	Activity Code	Class Co...	Class Name	Edison Pos Nbr	Position Title	Bgt Base Salary	Bgt Pos Type	Agency Salary Adj	F&A Sal Adj	Bgt Longevity
1	Change	39901	3990100001	073372	BUDGET ADMIN ANALYST 2	08000009	Budget Admin Analyst 2	$39,996	Full Time	$0	$0	$800
2		39901	3990100001	073373	BUDGET ADMIN ANALYST 3	08000010	Budget Admin Analyst 3	$45,000	Full Time	$0	$0	$300
3		39901	3990100001	075523	PROGRAMMER/ANALYST 3	08000011	Programmer/Analyst 3	$60,000	Full Time	$0	$0	$1,500
4		39901	3990100001	073872	INFORMATION OFFICER	08000012	Information Officer	$60,996	Full Time	$0	$0	$300

3. For positions that are overlapped, BEARS will automatically choose the person with the earliest start date as the incumbent and populate the cells in the Budgeted and Established Positions grid with that person's information. To manually change the incumbent, click in the "Edison EE ID" column

   Note: A position with multiple people in it is represented by a value >1 in the "Employee Count" column in the Budgeted and Established Positions grid.

2) Move

1. If you are wishing to move a position to a new allotment code or activity, select **Move** from the "Action" column.

   Note: This function is restricted based on your security level. If you only have access to one allotment code, you will not be able to move a position out of that code. Please contact your Agency Approver (Central Office) for assistance.

Select Code	Description
Change	Make changes to the existing position
Move	Moves a position to a new allotment, activity or agency
Abolish	Abolishes a given position
Reinstate	Reinstates an abolished position to your inventory
Copy EDISON	Copies the current EDISON data over the position

The only fields that you will be able to edit when moving positions are "New Agency," "New AllotCd," and "New Activity."

New Agency	New AllotCd	New Activity

Use the pop-ups that appear for each cell to fill in the new agency, allotment code, and/or activity for the selected position.

Note: All three fields must have values in order for the adjustment to successfully validate. Each field must be filled in, even if the field is not changing.

Example: If you are moving a position to a new allotment code within your department, you will simply select your department the "New Agency" column.

3) Abolish

1. To mark a position to be abolished within the BEARS Position Inventory, select **Abolish** in the "Action" column.

Select Code	Description
Change	Make changes to the existing position
Move	Moves a position to a new allotment, activity or agency
Abolish	Abolishes a given position
Reinstate	Reinstates an abolished position to your inventory
Copy EDISON	Copies the current EDISON data over the position

By doing so, the row will turn red and no other changes can be made.

Budgeted and Established Positions

	Action	AllotCd	Activity Code
1	Abolish	39901	3990100001

Positions that are abolished in the Position Inventory will stay in the system (marked as *Yes* in the "Abolished" column on the **Current Positions** tab in the "Budgeted and Established Positions" grid) until they are abolished in Edison, but will reduce the Pos Inv Budget Positions count. Marking a position for abolishment in Position Inventory, does not reduce the Budgeted Position Count until it has been reduced and fully approved through the Perform Adjustments module.

4) Reinstate

1. If a position has been abolished within the BEARS Position Inventory, it can be reinstated by choosing **Reinstate** in the "Action" column.

Select Code	Description
Change	Make changes to the existing position
Move	Moves a position to a new allotment, activity or agency
Abolish	Abolishes a given position
Reinstate	Reinstates an abolished position to your inventory
Copy EDISON	Copies the current EDISON data over the position

Note: When reinstating a position, no other changes can be made. Once a position has been fully approved for reinstatement, changes can be made via another adjustment with the "change" action.

5) Copy to EDISON

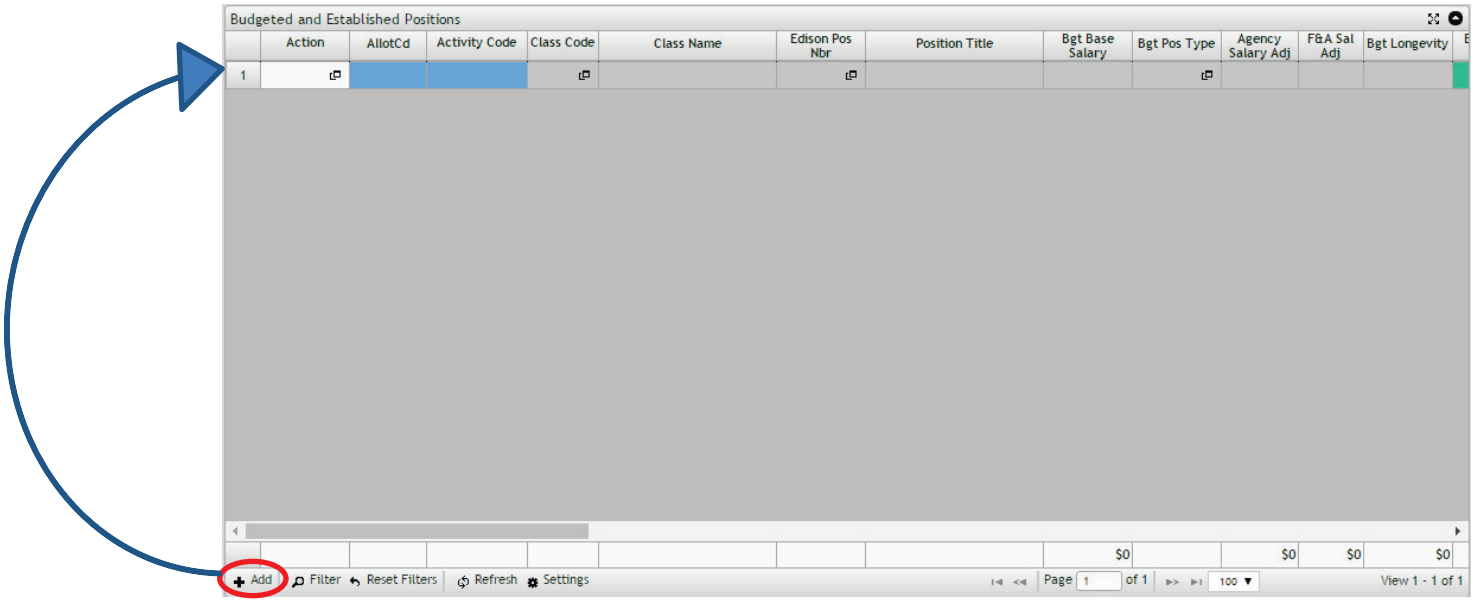
1. If a position has been changed within the BEARS Position Inventory, it can be reverted back to EDISON data by choosing **Copy EDISON** in the "Action" column.

Select Code	Description
Change	Make changes to the existing position
Move	Moves a position to a new allotment, activity or agency
Abolish	Abolishes a given position
Reinstate	Reinstates an abolished position to your inventory
Copy EDISON	Copies the current EDISON data over the position

How Do You Add Positions in the Position Inventory?

The BEARS system allows agencies to add new positions to the Position Inventory that have been authorized in the Budget but have not yet been established in Edison. This will provide a way for agencies to view the overall impact of their authorized position count before Edison has fully processed the establishment of the positions. Once the positions are established in Edison and the monthly reload has processed in BEARS, agencies will be able to link the newly-created Position Inventory position via the Edison Position Number.

1. To add a new positon to the Position Inventory, go to the **Modified Positions** tab. In the bottom grid, click the **+Add** button to add a new row.



2. In the "Action" column, select **New**.

Select Code	Description
New	Adds a new position to your inventory

This will allow you to enter the desired information into the following fields:

Class Code; Edison Pos Nbr; Bgt Base Salary; Bgt Pos Type; Agency Salary Adj; Bgt Longevity; Budget Ins Covg; Bgt Ret Plan; New Agency; New AllotCd; New Activity; GF State%; Ded State%; Federal Rev%; Other Rev%; and Edison EE ID

3. To assign a new position to an allotment code or activity, you must enter values in the “New Agency,” “New AllotCd,” and “New Activity” fields.

New Agency	New AllotCd	New Activity

Note: All three fields must be filled out in order for the adjustment to successfully validate.

Note: You must fill out the fields from left at right to generate the filtered information for your agency.

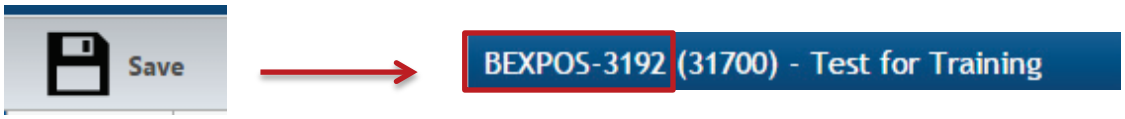
4. Once a position is created in Edison, you will need to link that position to the newly created Position Inventory position.

Note: The Position Inventory module is not connected to the Perform Adjustment module. ***Adjustments made in the Position Inventory DO NOT count as cost increases, reductions, reorganizations etc.***

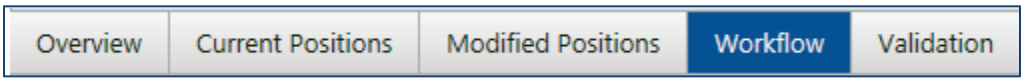
Note: The Position Inventory module does not send information to Edison or DOHR. ***Adjustments made in the Position Inventory DO NOT affect the data in Edison.***

How Do You Submit Position Inventory Adjustments?

1. Before you get ready to submit your adjustment into the workflow, click the **Save** button at the top to generate an adjustment number for your records. Remember to keep record of the adjustment number

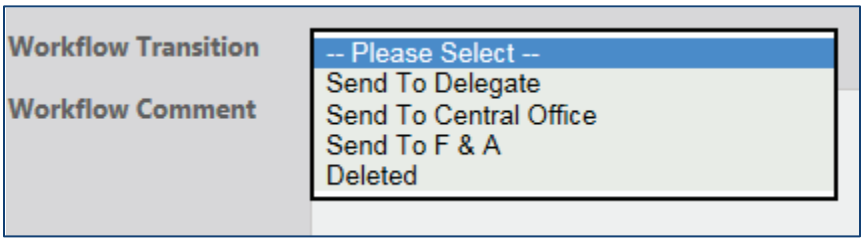


2. Go to the **Workflow** tab.



3. Under Workflow Transition, use the drop-down menu to select your desired workflow transition.
   - ***Send to Delegate*** – Sends to the Delegate step and allows Agency Analysts the ability to claim, edit, and review.
   - ***Send to Central Office*** – Sends to the Central Office step and allows Agency Approvers the ability to claim, edit, and review.
   - ***Send to F&A*** – Sends to the F&A step and allows F&A Budget Analysts the ability to claim, edit, and review.
   - ***Delete*** – Select this option to delete the Position Inventory Adjustment.

   *Note: Sending an adjustment to your own security level will hold it at that step. For example, an Agency Approver that selects **Send to Central Office** will send it to the workflow at the Central Office step and allow other Agency Approvers the ability to review.*



4. You can also add a comment to the adjustment by typing in the text box and clicking **Add Comment**. *Note: Comments travel with the adjustment as it moves through the workflow.*

5. Next, you will click the large icon for **Validate** to make sure everything balances.

6. If there are validation errors, there will be red X's (), and you will need to go back and review your adjustment.

   Once the errors are corrected, your validation screen should show all green check marks.

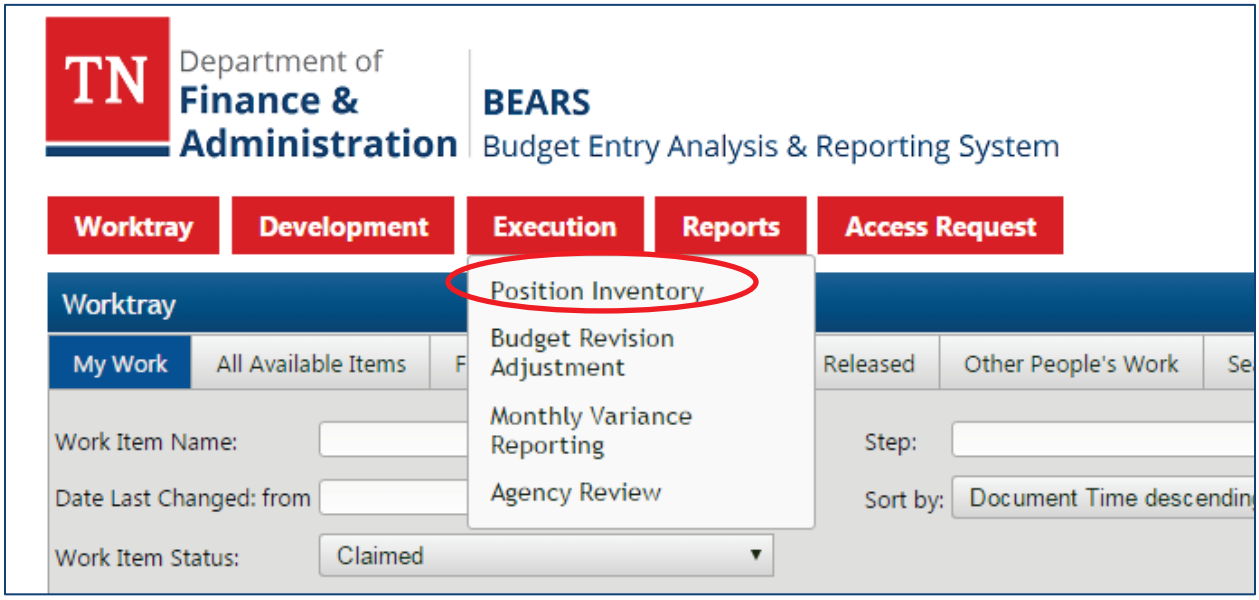
7. When your adjustment has validated click **Submit**.

Once your adjustment has been approved by your F&A Budget Analyst, the changes will appear the next time you start a Position Inventory adjustment without reloading from Edison.

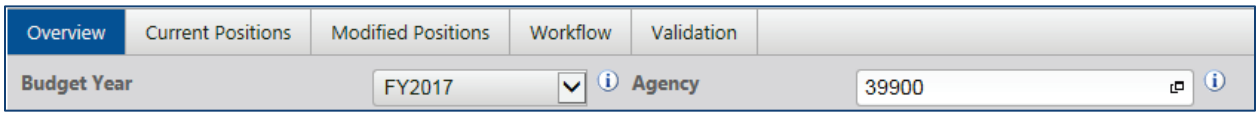
How Do You Use an Excel File to Update Position Inventory?

Position Inventory can also be updated by uploading an Excel file into BEARS with the positions you wish to modify. Despite any modifications you may have made in your Excel file, only the fields that are valid for the selected "Action" will be uploaded to BEARS.

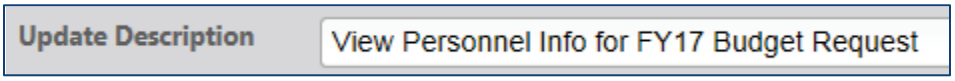
1. Go to the **Execution** tab and select **Position Inventory.**



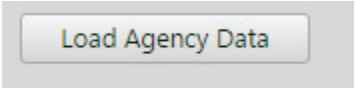
2. On the **Overview** tab of the Position Inventory, select the budget year and agency. Select the year in which you are currently operating. This will be one FY behind the Budget Request FY.



3. Enter a brief description of the update you will be making. *Note: The description entered into this field will be displayed in the worktray.*



4. Once you have entered your description, click the **Load Agency Data** button to load your agency's position data.



5. BEARS will begin to load your agency's position data. Once the spinner disappears and the page refreshes, you may move to the **Current Positions** tab in BEARS.

6. Below the Positions grid there will be a blue link to **Export All Positions to Excel.**

This will generate an Excel file containing all positions for your agency with both Budget and EDISON information.

Note: You will only be able to modify the Budget columns of the Excel file. EDISON information can only be modified through changes processed by DOHR.

Note: ***DO NOT CHANGE ANY OF THE COLUMN HEADERS OR THE ORDER OF THE COLUMNS IN YOUR EXCEL FILE.***

7. For the positions you are modifying, type the Action type in the "Action" column (reference pg. 12 for Action types), and reference the appropriate section of **Modifying Positions in the Modified Positions Tab** of this guide (beginning on pg. 12) to know which columns can be modified.

8. You will only need to upload the positions that have changes made to them. **DO NOT TRY TO UPLOAD THE ENTIRE EXCEL FILE.**

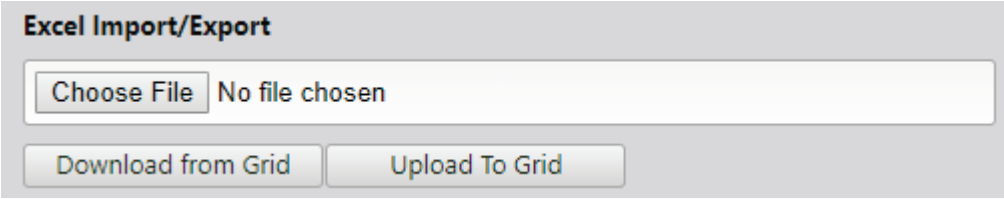
9. Copy the modified changes into a new Excel file and save that file. BEARS will recognize hidden rows so you must copy modified positions into a separate spreadsheet.

   Note: Also copy over the column headers when copying modified positions into a separate spreadsheet.

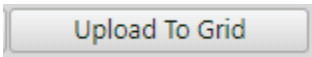
Note: BEARS can only upload 200 rows at a time. If you have more than 200 rows to modify you will need to do multiple adjustments.

10. When you are ready to upload a file, move to the **Modify Positions** tab.

11. To upload a file, click the **Choose File** button and select your file.



12. Once your file has uploaded click the **Upload to Grid** button. This will load your positions into BEARS and may take a few moments to load.



13. Review information that has been uploaded. BEARS will only upload allotment codes and activities that already exist within BEARS.

14. When you are ready to submit, refer to the **How Do You Submit Position Inventory Adjustments?** of this guide (pg. 19)