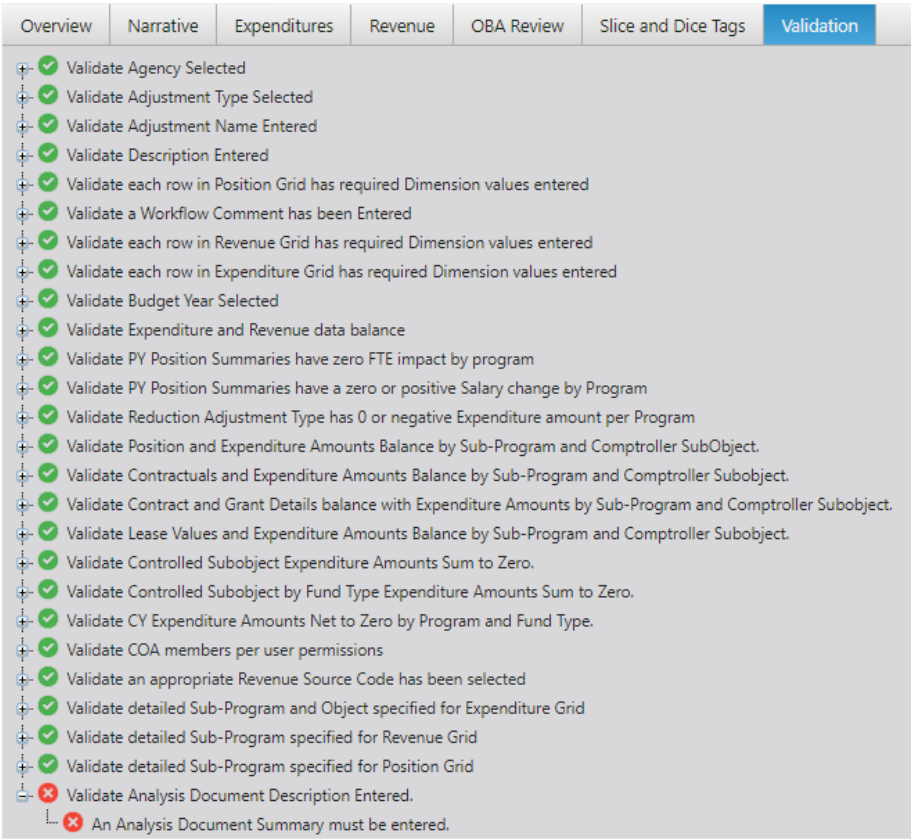
Adjustment Validations

Introduction:

Within BARS, all adjustments have specific requirements in order to be successfully submitted. These specific requirements, call "Validations", enable users to ensure that the data created by an adjustment is correct and complete. The following is a summary of the validations that users may run into over the course of their work of using adjustments.



Validation Rules Overview:

BARS contains a series of data validation rules which help aid users in entering the correct data needed to submit an adjustment. There are two different validations indicated by the system:

Fail Validations

Fail validations appear as red circles . These validations occur when information is missing and/or data between tabs is imbalanced. A user will be unable to complete an action or submit an adjustment until the information is entered accurately.

Pass Validations

Pass validations appear as green circles . These validations occur when all required information is entered accurately. There are no necessary steps required once these validations appear.

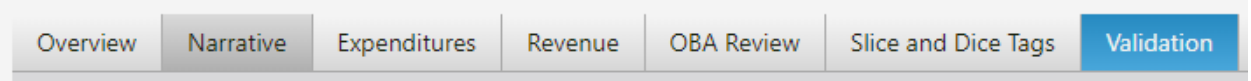
Validation Warnings vs. Errors

There are also validation *warnings* which appear as yellow triangular icons . Warnings alert users that BARS notices certain information should be validated or included before continuing. However, users will be able to submit a document and complete actions without making any changes based on the suggested information.

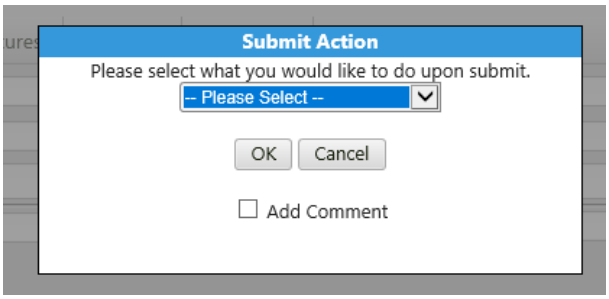
Errors prevent users from submitting altogether. Errors show up as fail or pass validations depending on whether requirements have been met.

Validation Tab vs. Submit:

Every adjustment in BARS has a **Validation Tab**. Clicking on that **Validation Tab** will show you a list of warnings, fail validations, and pass validations in the adjustment as-is. However, there are some validations that only hit upon submitting so clicking on that tab might not give the user a holistic view of where the adjustment stands regarding validations.



In order to get a holistic preview of where the adjustment stands regarding validations, users can click **Submit for Program Review** then do not click **Add Comment**. This will ensure that the adjustment does not actually submit (as it will hit that Add Comment validation) and show the user a list of all validations as they currently stand. This list will populate on that same **Validation Tab** by submitting.



Once a user is done with their work in an adjustment and submits the item, if they pass all validations then the **Validation Tab** will not even display. Instead, they will be taken back to the Worktray and a blue ribbon at the top of the screen will confirm the successful submission.

List of Validations:

The following includes the validations for most errors within standard adjustments, based on the tab the validation applies to:

1. Overview Tab

Failed Validation Text	Explanation	Action to Resolve
Validate Agency Selected - Please select an Agency before continuing.	All adjustments must have an agency selected so BARS knows what data to load and adjust.	Return to the Overview tab and select an agency at the top.
Validate Adjustment Type Selected - Please select an Adjustment Type before continuing	All adjustments must have a Type selected, as this guides workflow and what years can be adjusted.	Return to the Overview tab and select an Adjustment Type at the top.
Validate Adjustment Name Entered - Please enter an Adjustment Name before continuing.	All items in BARS must have names to help users understand what action is being taken.	Return to the Overview tab and type in an Adjustment Name at the top.
Validate Stage Selected - Please select a Budget Stage before continuing	All adjustments must have a Budget Stage selected so BARS knows what data to load and adjust.	Return to the Overview tab and select a Budget Stage at the top.
Validate Budget Year Selected - A Budget Year must be selected before continuing.	All adjustments must have a Budget Year selected so BARS knows what data to load and adjust. Budget Year also determines what kinds of adjustments can be used.	Return to the Overview tab and select a budget year at the top.
Validate COA members per user permissions - Please specify unit and/or program according to user permissions.	This applies to certain agency personnel who are given access to submit portions of their agency.	Users with those settings must return to the Overview tab and select a Unit and/or Program that they can access per permissions.
Validate Description Entered - Please enter a Description before continuing	The Description field must have some text in it. This field is useful for other users to understand why the adjustment is being made and to track changes made by different users.	Return to the Overview tab and enter text in to the Description field.

2. Narrative Tab

Failed Validation Text	Explanation	Action to Resolve
Validate Impact Entered - Please enter an Impact before continuing.	This validation is specific to Deficiencies, Reductions, and Over the Targets. For those adjustment types, users must add text to this field on the Narrative Tab, explaining the Impact of the actions in the adjustment.	Return to the Narrative Tab and add text in the Impact field.
Validate Justification Entered - A Justification must be entered before continuing.	This validation is specific to Deficiencies, Reductions, and Over the Targets. For those adjustment types, users must add text to this field on the Narrative Tab, explaining the Justification for the actions in the adjustment.	Return to the Narrative Tab and add text in the Justification field.

3. Positions Tab

Failed Validation Text	Explanation	Action to Resolve
Validate Position Subprogram Filter Selected - Please make a selection in the Position Sub-Program Filter before attempting to load Position data.	This occurs on the tab itself, and happens if the user clicks Load PIN Data without first selecting subprograms in the Position Sub-Program Filter.	Click the magnifying glass next to Positions Sub-Program Filter, select subprograms, click Accept Selection, then click Load PIN Data.
Validate an Action is Specified for Each Row in the Positions Grid - Please specify an Action for each row in the Positions Grid.	The Positions Grid (lower grid on the Positions Tab) has a row missing an Action (Add, Move, Change, Abolish, Unchanged). Every Position needs an action to ensure that BARS knows what to do with that Position in the adjustment.	Access the Positions Tab and ensure that every row has an Action.
Validate each row in Position Grid has required Dimension values entered - At least one row in the Position Grid is missing either a Subprogram, Class, FTE Number, Retirement System Code, or PIN.	The Positions Grid (lower grid on the Positions Tab) has a row missing a data point.	Access the Positions Tab and ensure that every row has all required data.

4. Prior Year Position Counts Tab – Specific to Actuals Adjustments

Failed Validation Text	Explanation	Action to Resolve
Validate PY Position Program Filter Selected - Please make a selection in the PY Position Program Filter before attempting to load Position data.	This occurs on the tab itself, and happens if the user clicks Load PY Summary without first selecting subprograms in the PY Position Program Filter.	Click the magnifying glass next to PY Position Program Filter, select subprograms, click Accept Selection, then click Load PY Summary.
Validate PY Position Summaries have zero FTE impact by program - PY Position Summaries has a value of (XXX) for (0) where it is expected to be zero.	FTE adjustments on the PY Position Summaries Tab must net to zero.	Return to the PY Position Summaries Tab and ensure that the FTE adjustments net to 0 (FY 20XX FTE Adjustment column).
Validate PY Position Summaries have a zero or positive Salary change by Program - PY Position Summaries has a value of (XXXXX) for (0) where it is expected to be Zero or an Increase.	Salary adjustments on the PY Position Summaries Tab must be net $0 or positive.	Return to the PY Position Summaries Tab and ensure that the FTE adjustments net to $0 or positive (FY 20XX Salary Adjustment column).

5. Contractual Positions Tab

Failed Validation Text	Explanation	Action to Resolve
Validate Contractual Filter Selected - Please make a selection in the Contractual Expenditure Filter before attempting to load Contractual Position data	This occurs on the tab itself, and happens if the user clicks Load Contractual Positions without first selecting subprograms in the Contractual Expenditure Filter.	Click the magnifying glass next to Contractual Expenditure Filter, select subprograms, click Accept Selection, then click Load Contractual Positions.
Validate Contractuals and Expenditure Amounts Balance by Sub-Program and Comptroller Subobject - Expenditures has a value of $XX for (XX) and Contractual Positions has a value of XX.	Contractual salaries on the Contractual Positions tab must match 0220 values on the Expenditure tab by subprogram and fund type.	Either (a) access the Contractual Positions tab and click Populate Expenditures so the Expenditure data matches the Contractual data or (b) tweak the Contractual Positions data so it matches what is on the Expenditures tab.

**Note – there is a separate validation ensuring that there is a 1 FTE/$20,000 contractual salary ratio in the contractual positions data (prorated), but this validation hits in the Budget Request Submission module not in adjustments.

6. Contract/Grant Tab

Failed Validation Text	Explanation	Action to Resolve
Validate Contract/Grant Subprogram Filter Selected - Please make a selection in the Contract/Grant Subprogram Filter before attempting to load Contract/Grant Expenditure data.	This occurs on the tab itself, and happens if the user clicks Load Contract/Grant Expenditures without first selecting subprograms in the Contracts Sub-Program Filter.	Click the magnifying glass next to Contracts Sub-Program Filter, select subprograms, click Accept Selection, then click Load Contract/Grant Expenditures.
Validate Contract and Grant Details balance with Expenditure Amounts by Sub-Program and Comptroller Subobject - Expenditures has a value of $XX for (XXX) and Contracts/Grants has a value of (XXXX).	Contract/grant amounts on that tab must match all objects 08 and 12 values on the Expenditure tab by subprogram, subobject, and fund type.	Either (a) access the Contract/Grant tab and click Populate Expenditures so the Expenditure data matches that data or (b) tweak the Contract/Grant data so it matches what is on the Expenditures tab.
Validate Contract/Grant Name Entered for each row in the Contract/Grant Grid - Please enter a Contract/Grant Name for each row in the Contract/Grant grid before attempting to update Contract/Grant details.	Every row in the Contract/Grant Details grid needs a Contract/Grant Name (first column) so BARS knows what details to edit.	In the Contract/Grant Details grid, find the row(s) without data in that first column and enter in a Contract/Grant Name.
Validate Contract Selected for each row in the Contract/Grant Details Grid - Please select a Contract/Grant for each row in the Contract/Grant Details grid before continuing.	Every row in the Contract/Grant Details grid needs a Contract/Grant Name (first column) so BARS knows what details to edit.	In the Contract/Grant Details grid, find the row(s) without data in that first column and enter in a Contract/Grant Name.
Validate Subprogram Selected for each row in the Contract/Grant Details Grid - Please select a Subprogram for each row in the Contract/Grant Details grid before continuing.	Every row in the Contract/Grant Details grid must have a subprogram selected (and the rest of the Chart of Accounts must be filled out as well).	Access the Contract/Grant Details grid and ensure that the Chart of Accounts is filled out for every row.

7. Real Estate Leases Tab

Failed Validation Text	Explanation	Action to Resolve
Validate Real Estate Sub-Program Filter Selected - Please make a selection in the Real Estate Sub-Program Filter before attempting to load Lease Values grid.	This occurs on the tab itself, and happens if the user clicks Load Lease Expenditures without first selecting subprograms in the Real Estate Sub-Program Filter.	Click the magnifying glass next to Real Estate Sub-Program Filter, select subprograms, click Accept Selection, then click Load Lease Expenditures.
Validate Lease Values and Expenditure Amounts Balance by Sub-Program and Comptroller Subobject - Expenditures has a value of $XX for (XXXX) and Lease Values has a value of (XXXX).	Real Estate Leases amounts on that tab must match 1301 values on the Expenditure tab by subprogram, and fund type.	Either (a) access the Real Estate Leases tab and click Populate Expenditures so the Expenditure data matches that data or (b) tweak the Real Estate Leases data so it matches what is on the Expenditures tab.

8. Expenditures Tab

Failed Validation Text	Explanation	Action to Resolve
Validate Program Selected - Please make a selection in the Expenditure Sub-Program Filter before attempting to populate appropriation data.	This occurs on the tab itself, and happens if the user clicks Load Sub-Program Expenditures without first selecting subprograms in the Expenditure Sub-Program Filter.	Click the magnifying glass next to Expenditure Sub-Program Filter, select subprograms, click Accept Selection, then click Load Sub-Program Expenditures.
Validate Controlled Subobject Expenditure Amounts Sum to Zero - Expenditures has a value of $XX for (XX, XXXX) where it is expected to be zero.	Users cannot change controlled subobjects at the agency/fund type level. They can only realign them within agency/fund type.	Access the Expenditure grid and change the adjustment so that the impact to the controlled subobject nets to $0 by fund type.
Validate each row in Expenditure Grid has required Dimension values entered - At least one adjusted row in the Expenditure Grid is missing a required field (unit, program, Subprogram, object, etc.).	All rows in the grid must have every component of the Chart of Accounts filled out (unit, program, subprogram, object, subobject, and fund type).	Access the Expenditure Financials grid and ensure that the Chart of Accounts is filled out for every row.

9. Revenue Tab

Failed Validation Text	Explanation	Action to Resolve
Validate Expenditure and Revenue data balance - Expenditures has a value of $X.00 for (XXXX) and Revenue has a value of $X.00 for (XXXX).	The Expenditure and Revenue data must match by program and fund type.	Either (a) return to the Expenditure tab, click Populate Revenue so the two match, then access the Revenue tab and specify fund sources or (b) return to the Revenue tab and tweak the data so it matches the Expenditure tab data by program and fund type.
Validate an appropriate Revenue Source Code has been selected - At least one adjusted program is missing a specific Fund Source selection on the Revenue Tab.	Every non-General Fund data point on the Revenue tab (excluding CUR and CR) must have a fund source specified rather than use of a generic fund type (i.e. Special Funds, Federal Funds, etc.).	Return to the Revenue tab, find the generic fund source, and change it to a specific fund source.
Validate each row in Revenue Grid has required Dimension values entered - At least one row in the Revenue Grid is missing a required field (program, fund type, etc.)	At least one row in the Revenue Grid is missing a required field (program, fund type, fund source, etc.)	Access the Revenue tab, identify the row missing data, and add the data.

10. Submit

Failed Validation Text	Explanation	Action to Resolve
Validate Submit action - When submitting a work item, you must select a submit action before clicking the 'OK' button.	Every time users Submit in BARS, they must choose where that submission is to go, whether it is just to continue working or to advance the item along workflow.	Select a submit action before clicking the 'OK' button.
Validate a Workflow Comment has been Entered - Please enter a Workflow Comment before submitting.	Every time users Submit in BARS, they must enter a Workflow Comment explaining to others why they made changes to the item or what they want the reviewer to look at.	Click the Submit button, select a submit action, click the Workflow Comment toggle, and enter in some explanatory text before clicking the 'OK' button.