Building Enterprise Access Request System (BEARS)

Access Coordinator User Guide

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Using this guide

To navigate easily through this guide, hold the Ctrl button and click on a heading in the Table of Contents. The BEARS system is configured for each user based on their agency and ordering needs, so some information may not be relevant to your situation.

Capitol Security contact information

Contact Information

DES Capitol Security
(360) 902-3560
DESAccessControl@des.wa.gov

Badge Pickup Location

Capitol Court Building
Suite 250
Olympia, WA 98504

Purpose of the system

The purpose of the BEARS system is to provide Access Coordinators with an intuitive and efficient system that streamlines the badge ordering process. DES Capitol Security is able to configure Access Coordinator user profiles so that only relevant options are able to be selected during the badge request and order process, which will reduce confusion and expedite the fulfillment process.

Accessing the system

At this time, the BEARS system is available only on computers, not mobile devices. Active Directory users must be connected by LAN (docked at your work desk) or connected to VPN in order to use BEARS.

Browsers

Please use one of the following browsers to access the BEARS System: Chromium Edge (new Edge), Google Chrome, Firefox. BEARS may not function as intended in Internet Explorer or Microsoft Edge (old Edge).

Links

Production BEARS: https://apps.des.wa.gov/BEARS
QA BEARS (used for testing only): https://qaapps.des.wa.gov/BEARS

Obtaining access to the BEARS system

To gain access to the BEARS system, contact DES Capitol Security. Some initial information will be collected so that your user account can be established and appropriately configured.

Authentication

When you first access the BEARS website at the link above, you will be prompted to authenticate with a Single Sign On (SSO) screen, which will contain a number of selections.
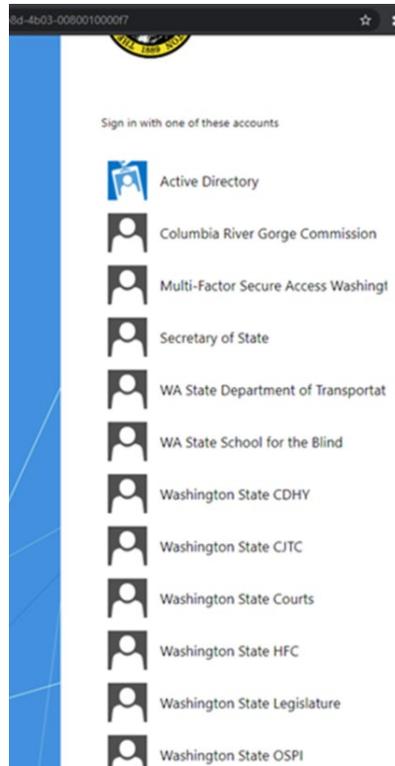
This screen may not appear every time you access BEARS. If Active Directory or an agency option pertains to you, please select that option. Upon successful entry of your credentials, you will be routed to the BEARS home screen. If you are unable to authenticate into the system successfully, please contact Capitol Security, as they may need to obtain some additional information to set up your account, prior to you being able to successfully log in.

Users that do not have a selection on the SSO screen must get a **Secure Access Washington with Multifactor Authentication** (MFA-SAW) account. To obtain a MFA-SAW account, please access the [SAW website](#) and sign up for an account using the email address that you use for work, and to where you will receive BEARS system notifications. Once you have a SAW account, navigate to the BEARS website and you will be presented with the SSO screen (as seen above) again. Select Multi-Factor Secure Access Washington, and you will be routed to the SAW website where you will be prompted to add Multi-factor Authentication to your SAW account, if you do not already have it. Once you have added MFA to your SAW account, or you enter your MFA-SAW credentials if you already had an account established, you will be routed back to the BEARS website.

Please note that your session in BEARS will expire after 20 minutes. After that time, you will need to refresh your browser.

Navigation, Tooltips, Tables, and Required Fields

Navigation

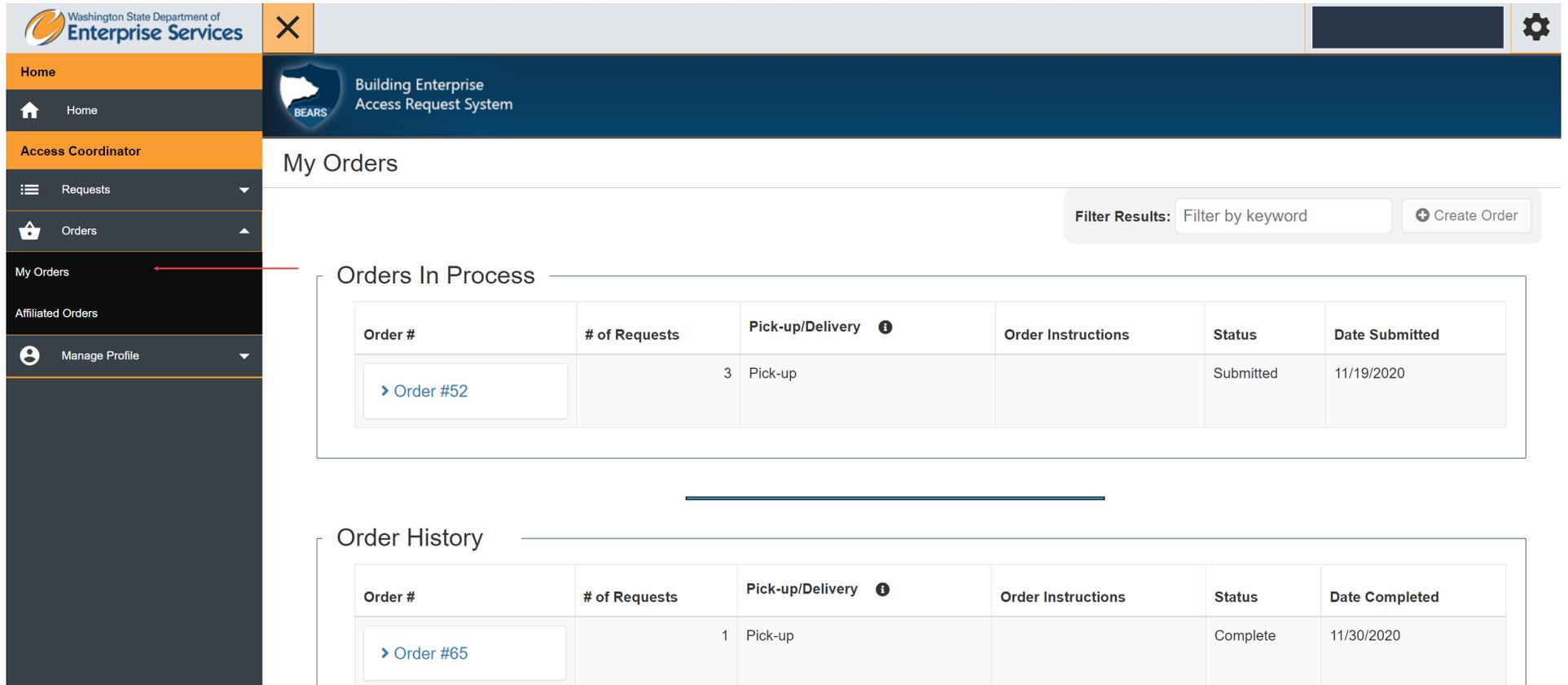To navigate throughout the system, use the left-hand navigation menu:
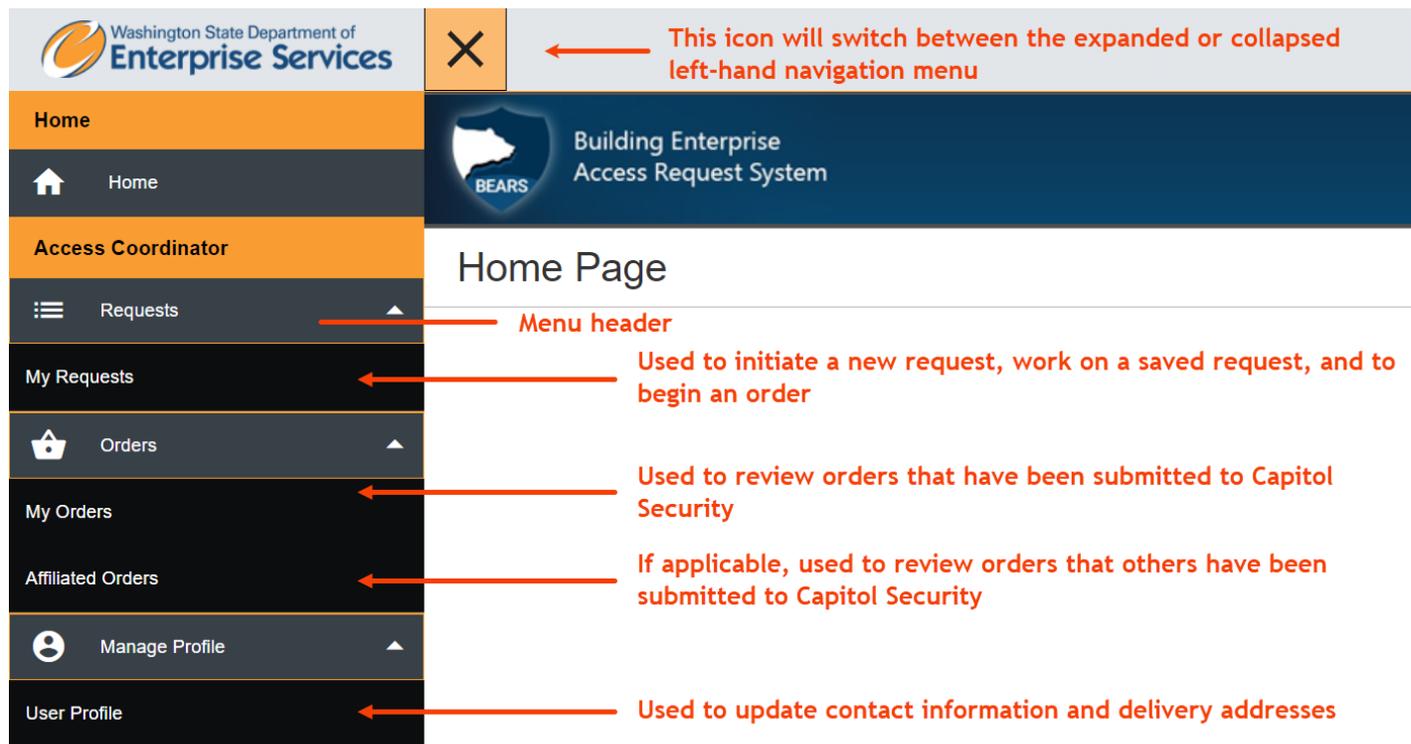
To expand the menu, click the ☰ icon. To collapse the menu, click the ✕ icon.

- The **Requests** > **My Requests** menu option will direct you to a screen where you can initiate a new request, review, edit, and delete saved requests (requests that have not yet been submitted with an order). The order process can begin from this screen if there are requests that are ready for order, having met the required field criteria.
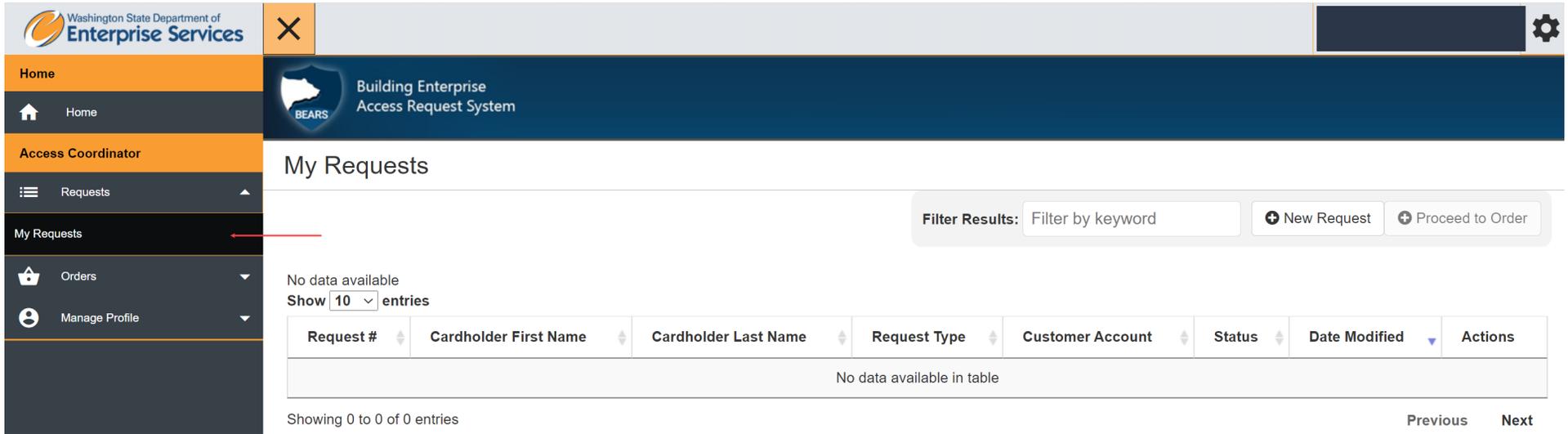
- The **Orders** > **My Orders** menu option will direct you to a screen that contains two tables:
  - The **Orders in Process** table displays orders that have been submitted to Capitol Security, and are in the process of being processed and/or fulfilled.
  - The **Order History** table shows your completed and cancelled orders.

- The **Orders** > **Affiliated Orders** menu option will direct you to a screen that displays orders that other Access Coordinators, who share a Customer-Account with you, have submitted to Capitol Security. This option may not pertain to all users.

- The **Manage Profile** > **User Profile** menu option will direct you to a screen where you can manage your contact information and delivery addresses.

Fields in BEARS

Throughout the BEARS system, you will see the tooltip icon 🛈 . Hovering over this icon will give you more information about the field.

Required fields are indicated with an asterisk *****.

Tables in BEARS

There are many tables in the BEARS system, and they function in a consistent manner. To filter the information in a table, begin typing in the "Filter by keyword" text box in the upper right-hand corner of the screen, for example:

Filter Results: [Filter by keyword]   ⊕ New Request

⊕ Create Order

You can sort the information by any column in a table by clicking on the arrows next to the column title. Click again to reverse the sort order. Hold *shift* and click on the column headers to sort by multiple columns at once.

Show [10 ⌄] entries

| Request # ▾ | Cardholder I |

<u>Show # entries</u>: Just above the table, you have the ability to change the number of entries that you can see in the table.
<u>Previous and Next Pages</u>: Use these buttons to navigate through the entries in the table, if you have more than one page of entries.

Managing the User Profile

To navigate to your User Profile, click the **User Profile** menu option in the left-hand navigation menu under the **Manage Profile** menu title. Just under the User Profile heading, you should see your name and email address displayed. This information comes from Active Directory or SAW and cannot be changed by the users in BEARS.

User Info

The User Info section contains information about your BEARS account:

Phone*: Required field; please enter the phone number at which you would like to be contacted for BEARS-related content, such as questions about your badge requests.

Extension: Enter an extension to your phone number, if you have one. If not, leave blank.

Request Type(s): These are the types of requests that you can make in the BEARS system, and are configured to your specific ordering needs. Please contact Capitol Security if you have questions about your Request Type(s).

Cardstock: Cardstock is the specific material used for a badge, and this field is configured to your specific ordering needs. Please contact Capitol Security if you have questions about Cardstock.

Customer-Account(s): Customer-Accounts are part of the DES billing system. If applicable, during the Request process, you will select the Customer-Account to be charged. Many users will have only one Customer-Account.

Default Delivery Address: Once you have entered mailing addresses in the Manage Address section of the User Profile, your Default Delivery Address will display here. The default delivery address is where fulfilled orders will be sent by default, unless you change your Delivery Address at the time of your Order.

Manage Addresses

Clicking the *Manage Addresses* button, then the *Add New Address* button will allow you to add a new address, or edit an existing address, to be used when you order through the BEARS system:

Default Address: Selecting this option will make this address default when you are placing an Order. You can only have one Default Delivery Address. You can select a different delivery address at the time of your Order.

Address Type - Mailstop: If this box is checked, only the Alias, Delivery Recipient, and Address Line 1 fields will be available to accommodate Mailstop addresses.

Alias*: Required field; this field will help you identify the correct address when making a selection for your Order.

Delivery Recipient*: Required field; name of the person to whom the badges will be mailed.

Address Line 1*: Required field; first line of the address. Or, if Mailstop was selected, the Mailstop number should be entered here.

Address Line 2: Optional; second line of the address.

City*: Required for non-Mailstop addresses.

State*: Required for non-Mailstop addresses; defaults to WA.

Zip Code*: Required for non-Mailstop Addresses.

Manage Delivery Addresses

[Add New Address] [Save]

Set As Default

☐ Default Address ← *You can have one default Delivery Address. Your address can be changed at the time of your order*

Address Type

☐ Mailstop ← *If you select "Mailstop", only the fields needed for mailstop deliveries will be available*

Alias*

Delivery Recipient*

Address Line 1*

Address Line 2

City* | **State*** WA | **Zip Code*** #####

No data available

Your list of saved addresses will appear here. Use the buttons under "Actions" to manage them

Show [10 ⌄] entries

Alias ▲	Address ⇅	Actions ⇅
No data available in table		

Showing 0 to 0 of 0 entries   Previous   Next

Once you have entered the required address information, click the *Save* button to save your entry. Prompts will appear for missing required fields or fields filled out incorrectly. A successfully entered address will display in your list of saved addresses below the form. Using the buttons in the Actions column of the address list will allow you to Edit or Delete a saved address. To add another address, click the *Add New Address* button.

Saving your profile information

To save the changes that you made to your User Info, click the *Update Profile* button beneath the User Info section.

Requests & Orders

Request and Order Overview

The process for ordering badges is a two-part process: 1) creating one or more Requests, and 2) submitting your Order to be processed by Capitol Security. Both parts of the process must be completed for Capitol Security to receive your information. Once your Order is submitted to Capitol Security, they will process each Request, then change the Order status to Complete. Here is a simplified version of the process that you will follow when ordering through the BEARS system:
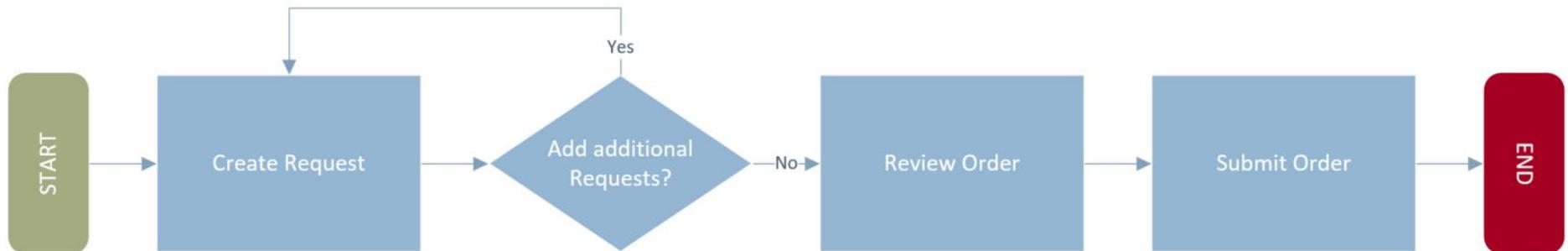

My Requests

The **My Requests** screen is the location to begin a new Request, review your list of Requests that have not yet been submitted to Capitol Security, and to proceed to your Order. To access the My Requests screen, click the **Requests** heading in the left-hand menu, then click **My Requests:**
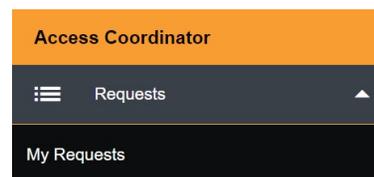
Initiating a new Request

To begin a new Request, click the *New Request* button in the upper right-hand corner of the **My Requests** screen:
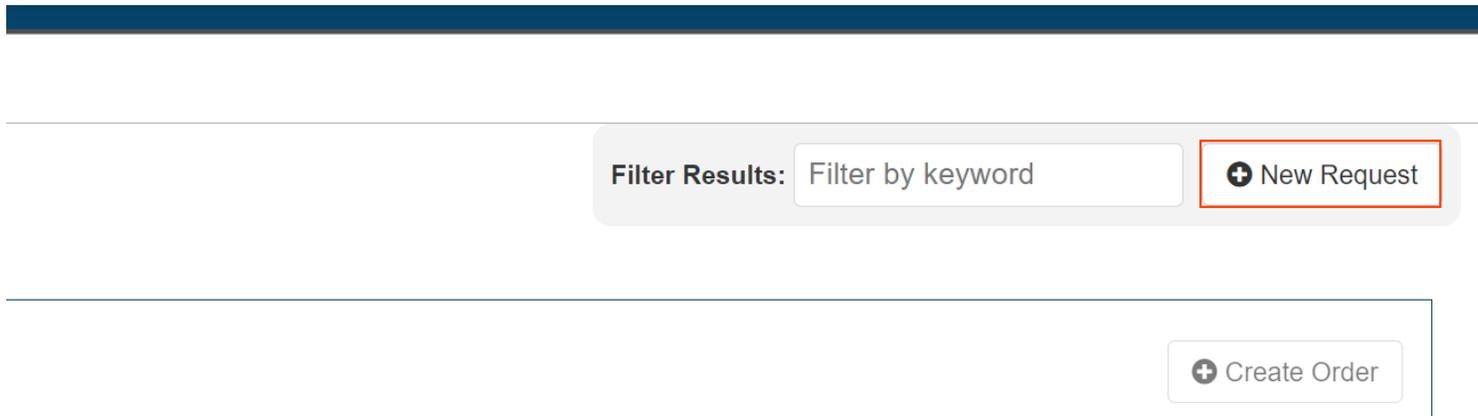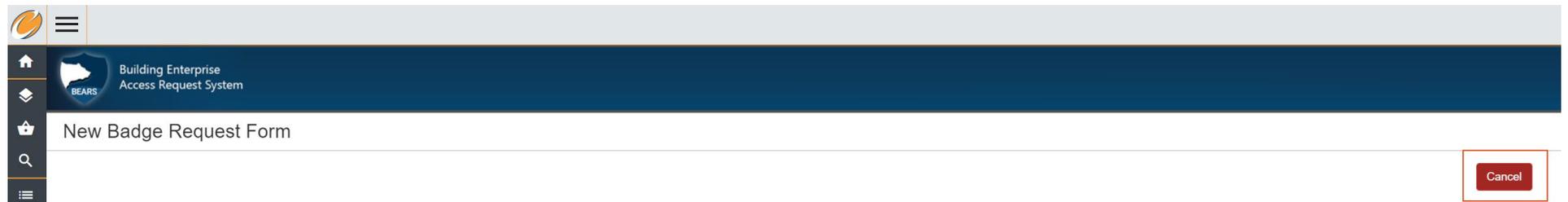

Then, select your Request type from the popup.
NOTE: Your available Request Types are configured by Capitol Security, and pertain to your individual ordering needs. If you have questions about the options displayed, please contact Capitol Security.

The Request form is broken into two different sections: 1) The General Info section, and 2) the Badge Detail section. Fields in the General Info section can vary by the options configured for you by Capitol Security, and pertain to your individual ordering needs. It is important to note that the fields available for your Request are configured behind the scenes, based on what is required to process your Request. **Not all of the fields listed below will be available for every Request.**

Navigation on the Request screen
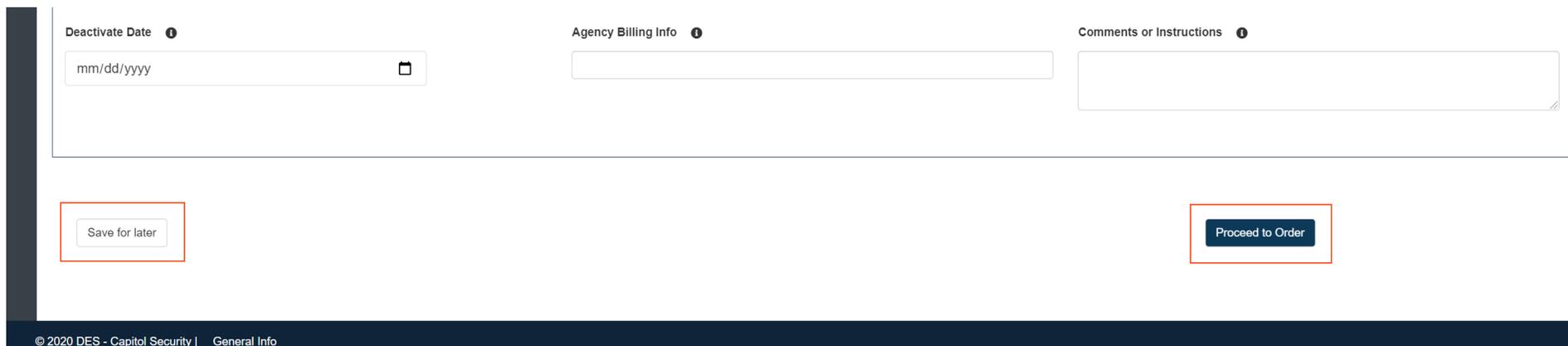
Washington State Department of
Enterprise Services

Deactivate Date ⓘ	Agency Billing Info ⓘ	Comments or Instructions ⓘ
mm/dd/yyyy		

Save for later   Proceed to Order

<u>Cancel</u>: Displays in the upper right-hand corner of the screen; cancels changes made in the form. Clicking this button will return you to the **My Requests** screen.

<u>Save for later</u>: Displays in the lower left-hand corner of the screen; saves your Request **without validating the information entered**. Use this button if you need to save your place and return to the Request at a later time. Clicking this button will return you to the My Requests screen, where you will see your request on the **My Requests** screen in the Saved for Later table.

<u>Proceed to Order</u>: Displays in the lower right-hand corner of the screen; this button will **validate the information** and take you to the Order Review screen. If information has been entered incorrectly, or required fields are missing, you will receive an error notification that will direct you to correct the information.

Request - General Info section

Here are some of the fields that you may encounter in the General Info section; **not all of the fields listed below will be available for each Request**:

<u>Customer-Account Name*</u>: If you have multiple Customer-Account Names, it is crucial that you select the correct option, as **this field determines where the Request is billed.** If you are unsure what to select, please contact Capitol Security prior to including this Request in an Order.

<u>Badge Template</u>: A Badge Template is the design of your badge. Once selected, if an image of the template is available, it will show to the right of the Badge Template field.

<u>Cardstock</u>: Cardstock is the material on which your badge will be printed.

<u>Quantity</u>: Some badges are able to be ordered in a quantity greater than 1. If that option is available for your selected Badge Template, you will be able to increase the Quantity.

<u>Access Level(s)*</u>: These are the standard Access Level(s) available for the Customer-Account that you selected. If you do not see the necessary Access Level in this field, enter your Access Level needs in the Other Access field. If these fields are available, you must complete either the Access Level(s) **and/or** the Other Access field to proceed.

Use Previous Access Levels: This field is available for replacement badges only; check this field if you would like Capitol Security to replicate the Access Levels that the Cardholder had prior to needing a replacement badge.

Other Access*: This is a freeform field to describe Access Level needs that are not available in the Access Level(s) field. **Please leave this field blank if the Access Level(s) field satisfies the access needs for the Cardholder.**

Replace Reason*: For replacement badges; select a reason that this badge needs to be replaced.

Deactivation Reason*: For badge deactivations:

Temporary: Cardholder's badge needs to be turned off for a period of time with the option to be restored at a later date, cardholder still employed

I.e., Current badge needs to be deactivated until a replacement order has been placed, seasonal employees expected to return, Contractors or Vendors who likely will return but are not actively working.

Permanent: Cardholder is no longer employed or contracted with the State, cardholder profile and badge can be turned off. If you select this option, you will need to submit a Request for a replacement badge.

Request - Badge Details section

Here are some of the fields that you may encounter in the General Info section; **not all of the fields listed below will be available for each Request.** Whether or not these fields are required or optional is based on the selected Badge Template:

Cardholder First Name: First name of the Cardholder.

Cardholder Last Name: Last name of the Cardholder.

Employee ID: This is the employee ID that follows an employee through their state career. This number helps Capitol Security identify the specific employee in the access control system.

Company Name: List the Cardholder's company.

Email: Enter the Cardholder's email address.

Phone Number: Enter the Cardholder's phone number.

Deactivate Date: This field is required for badge deactivations. Use this field if you know when a Cardholder's access should expire; otherwise, leave it blank.

Agency Billing Info: This field is available for you to enter accounting coding information that will display on the invoice for your Accounts Payable staff. The information you enter here will display in the Item Description for this specific Request. Each Request is a single line item on the invoice.

Employee Ref. #1: Custom field option for your agency.

Employee Ref. #2: Custom field option for your agency.

Cardholder Previous Name: Enter the Cardholder's previous name as it was displayed on their badge.

Additional Comments and Instructions: Enter any additional comments or instructions for this Request.

Cardholder Picture: This field allows you to browse your computer for a picture of the Cardholder that will display on their badge. The maximum file size if 5MB, and the allowed file extensions are .PNG, .JPEG, and .JPG.

My Requests tables

If you have completed Requests that have not yet been submitted, you will see them in the Ready to Submit table. If you have Requests that need more information before being submitted to Capitol Security, you will see them in the Saved for Later table.

My Requests

Filter Results: Filter by keyword   ⊕ New Request

Ready to Submit

⊕ Create Order

Show 10 ⌄ entries

Request #	Cardholder First Name	Cardholder Last Name	Request Type	Customer Account	Date Modified	Actions
211			New	DES - FPM Facilities	01/04/2021	☑ Edit 🗑 Delete

Showing 1 to 1 of 1 entries   Previous 1 Next

Saved for Later

Show 10 ⌄ entries

Request #	Cardholder First Name	Cardholder Last Name	Request Type	Customer Account	Date Modified	Actions
210			New	DES - FPM Facilities	01/04/2021	☑ Edit 🗑 Delete

Showing 1 to 1 of 1 entries   Previous 1 Next

Components of the My Requests tables

<u>Request #</u>: Each Request has a unique Request #, it will display here

<u>Cardholder First Name</u>: If your Badge Template has a Cardholder First Name, and you entered a name, it will display here. Otherwise, this field will remain blank.

<u>Cardholder Last Name</u>: If your Badge Template has a Cardholder Last Name, and you entered a name, it will display here. Otherwise, this field will remain blank.

<u>Request Type</u>: The type of Request that has been initiated

<u>Customer Account</u>: This is the billing account that has been selected for that Request

<u>Date Modified</u>: The most recent date that the Order has been saved or validated.

<u>Actions</u>:

<u>Edit</u>: Click this button to edit your Request

<u>Delete</u>: Click this button to delete your Request. **Deleted Requests cannot be retrieved**.

Clicking the *Create Order* button will take you to the **Order Review** screen with the Requests that are ready to submit.

Filter Results: | Filter by keyword | ⊕ New Request

⊕ Create Order

Order Review

The Order Review screen compiles Requests that meet the validation requirements of the system (e.g., required fields are completed). Each Request is displayed with pertinent information, but the information displayed on this screen will vary depending on the Badge Template selected for the Request.

Navigation on the Order Review screen

New Request: Displays in the upper right-hand corner of the screen; this button will begin a new Request. **This button does not submit your Order**. You will need to return to the Order Review screen to submit the Order.

Return to My Requests: Displays in the lower left-hand corner of the screen; this button returns you to the My Requests screen. **This button does not submit your Order**. You will need to return to the Order Review screen to submit the Order.

Submit Order: Displays in the lower right-hand corner of the screen; this button submits your Order with the Requests that are on the Order Review screen. **Please be sure that you have reviewed all Requests on the screen prior to clicking this button**. Required fields on this screen must be completed prior to this button being clicked. Once the button is clicked, you will be redirected to your My Orders screen.

> NOTE: Once your Order has been submitted, you will receive an Order confirmation email to the email address associated with your BEARS account.

Components of the Order Review screen

Each individual Request has the following options:

> Remove Request button: Click the Remove Request red [x] icon to remove this Request from the Order. This button returns the Request to the **My Requests** screen Ready to Submit table, and excludes it from this Order. From the My Requests screen, the Request can be edited or submitted with a different Order.
>
> View Details: Clicking the "View Details" button will display a popup with key information about the Request. If you need to make changes to the Request, click the "Remove Request" button, which will return it to the **My Request** screen Ready to Submit table, where it can be edited.

The options for the entire Order are as follows:

> Order Instructions: Optional; enter any additional information about your Order in this field.
>
> Select Delivery Method: Required; select the method by which you would like to obtain your badge(s).
>
> > Delivery (address or Mailstop): Select this option to have your Order mailed to a mailing address or Mailstop. By default, your selected Default Delivery Address will display.
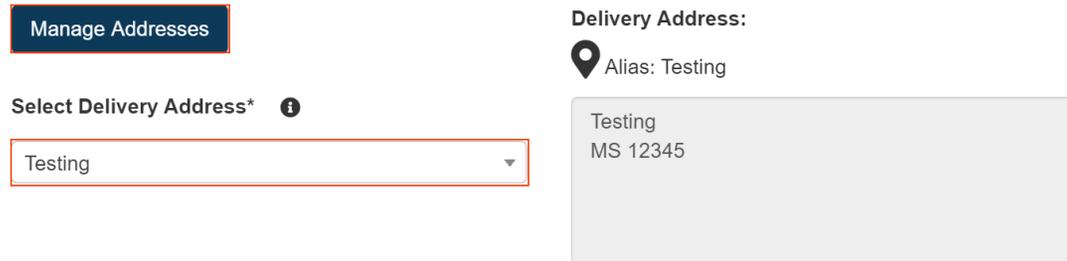
Manage Addresses		Delivery Address:
Select Delivery Address* ⓘ		📍 Alias: Testing
Testing ▼		Testing MS 12345

- Click the "Manage Addresses" button to add a new address or manage your saved addresses. This button will not navigate you from this screen; it will display a popup that presents the same options as the Manage Addresses function in your User Profile.
- Click the dropdown in the "Select Delivery Address" field to select from a list of your saved addresses.

> Pick-up: Select this option if you would like to pick your Order up from the Capitol Security office:

Badge Pickup Location:
Capitol Court Building

Suite 250
Olympia, WA 98504

Once you submit your Order, you will receive a confirmation email to the email address that you have in your [User Profile](#). You will also receive an email when Capitol Security has completed the processing of your Order, or if your Order has been cancelled.
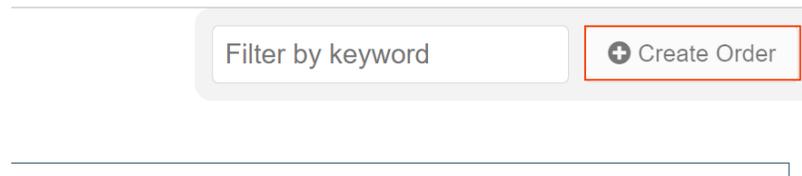
Orders

My Orders

To access the **My Orders** screen, click the *Orders* heading in the left-hand menu, then click *My Orders*:
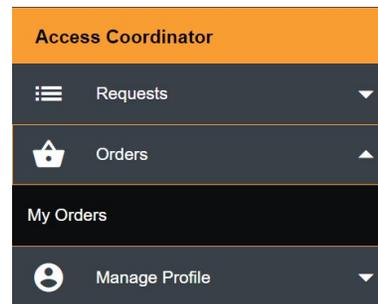
From the **My Orders** screen, you can create another Order if you have completed and system validated Requests. Click the *Create Order* button, in the upper right-hand corner of the screen, to begin the Order process:

My Orders tables

There are two tables on the My Orders screen: Orders in Process (if there are any) and Order History:

- *Orders in Process:* Displays Orders submitted to Capitol Security, but not yet processed

- *Order History*: Displays submitted Orders that have been:
  - Cancelled, *or*
  - Complete

Components of the My Orders tables

The columns on the two tables are nearly identical, with the exception of the date column. It will display the Date Submitted for the Orders in Process table, and the Date Completed for the Order History table.

Order #: This is the assigned Order number
# of Requests: Displays the count of the Requests contained in the Order
Pick-up/Delivery: Displays the selected Delivery Method
Order Instructions: The instructions that were provided for the Order
Status: The current status of the Order
Date Submitted: In the Orders in Process table, displays the date that you submitted the Order
Updated On: In the Order History table, the most recent date in which the Order was updated
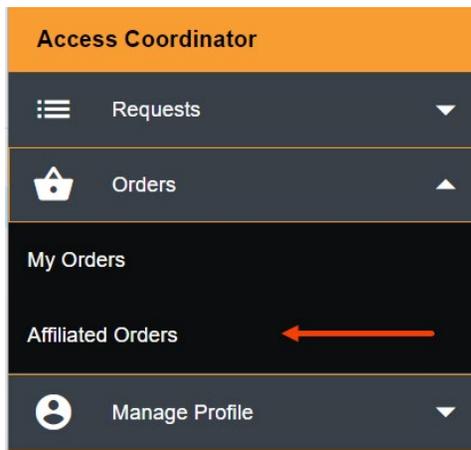
To view more details about an Order (e.g., Request details), click the Order Number in the Order # column, which will expand to show a list of Requests included in that Order. To view more details about a Request contained within the Order, click the title of the Request.

Clicking on a Request will display the details of that Request. If an Order is submitted, but not yet completed, and you need changes made to a Request, contact Capitol Security. If Capitol Security removes a Request from an Order, that Request will be available in your My Requests table for changes to be made. If a Request has been completed with an error, contact Capitol Security. The correction to a completed Request will be determined by the details of that Request, and the remedy can vary based on the circumstances of the correction needed.

Affiliated Orders

Affiliated Orders are Orders made by other Access Coordinators with whom you share a Customer-Account. Not all users will have the Affiliated Orders option. If you have this option, click the *Orders* heading in the left-hand menu, then *Affiliated Orders* to navigate to the screen.

Order History table

The Affiliated Orders screen contains an Order History table with the following columns:

Order #: This is the assigned Order number
# of Requests: Displays the count of the Requests contained in the Order
Pick-up/Delivery: Displays the selected Delivery Method
Access Coordinator: Displays the Access Coordinator that submitted the Order
Order Instructions: The instructions that were provided for the Order
Status: The current status of the Order
Updated On: The most recent date in which the Order was updated

To view more details about an Order (e.g., Request details), click the Order Number in the Order # column, which will expand to show a list of Requests included in that Order. To view more details about a Request contained within the Order, click the title of the Request.

Clicking on a Request will display the details of that Request.