

BEARS Requesting Access

This lesson will provide a conceptual overview of the Access Request (ACSREQ) function in the BEARS system.

Key Notes:

- To log in to BEARS, go to home.bears.tn.gov
- BEARS contains various user roles with differing security levels.
 - **Reporting User** – Has access to reports, but cannot edit or submit data; has visibility over the entire department. (As of July 2016 training, this user role has not been set up in BEARS. Please check with your F&A Budget Analyst before submitting an access request for this type of user.)
 - **Agency Analyst** – Can create and submit adjustments, but does not have the ability to approve adjustments; can restrict visibility to one allotment code. This user corresponds to the “Delegate” step in the workflow.
 - **Agency Approver** – Top-level BEARS user within an agency; can create, approve, and send adjustments to F&A (Budget Office); has visibility over entire department. This user corresponds to the “Central Office” step in the workflow.
- **Budget Analyst** – Can create, review, and edit adjustments for assigned agencies. This user corresponds to the “F&A” step in the workflow.
- **Budget Coordinator** – Can create, review, and edit adjustments for an assigned group of agencies.
- **Senior Budget Coordinator** – Can review all data in the system; responsible for modeling scenarios and endorsing the recommended budget.
- **Administrator** – Has full control of the system; should not be submitting adjustments.

Agency

Division of Budget

- An agency can have multiple users in each role, depending on the hierarchy of the agency. If you are unsure of your BEARS role, contact your Fiscal Director or your F&A Budget Analyst for assistance and clarification.
- The process for requesting access is different for users who are part of the Active Directory (with a RACFID) and for users who are not part of the Active Directory (without a RACFID).
 - Users who are part of the Active Directory will have a @tn.gov email address.
- You only need to get approved for access once. After that, logging in to BEARS will take you directly to the home page.
- You can log in to BEARS while you’re away from the state network, however you will be required to complete a visual-response test in order to gain access.

BEARS Requesting Access

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How Do You Gain Access to BEARS So That You Can See Your Agency's Budget Data?




A) Requesting access for BEARS with a RACFID

1. Open your web browser and navigate to: home.bears.tn.gov. *Note: Make sure your Pop-Up Blocker is turned off.*
2. A pop-up will appear asking for your credentials. Enter your RACFID and password. This will take you into the BEARS system.
3. Click the **Access Request** button on the upper navigation bar.










4. BEARS will use your State login to auto-populate some details (your RACFID, name, email, and desk phone number).
5. Complete the remaining fields. *Note: Cell phone is not required, but please be sure to enter your Manager's Name.*

Access Request

 Save
 Validate
 Submit

User Details
Access Details
Workflow
Validation

System User Name	<input type="text" value="NET\agbud014"/> 
Full Name	<input type="text" value="John Doe"/> 
Email Address	<input type="text" value="John.Doe@TN.gov"/> 
Managers Name	<input type="text"/> 
Desk Phone	<input type="text" value="615-401-1111"/> 
Cell Phone	<input type="text"/> 
Language	<input type="text" value="English (United States)"/> 

- Click on the **Access Details** tab. From the drop-down menu, select your requested role.

The screenshot shows the 'Access Request' interface with the 'Access Details' tab active. A dropdown menu for 'Requested Role' is open, displaying a list of roles: Agency Analyst, Agency Approver, Budget Analyst, Budget Coordinator, Administrator, Senior Budget Coordinator, System Administrator, and Reporting. Below the dropdown is an empty table for 'Requested Organizational Access'. At the bottom of the interface, there are filter and refresh controls, and a message that says 'No records to view'.

- Once you have selected your role, a grid will appear below.
- Click on the blue highlighted cell in the first row of the grid.

The screenshot shows the 'Access Request' interface with the 'Requested Role' dropdown set to 'Agency Approver'. The 'Requested Organizational Access' table now contains one row with a blue highlight on the first cell. The table has a header row and one data row with the number '1' in the first column. Action buttons for 'Copy' and 'Delete' are visible next to the row.

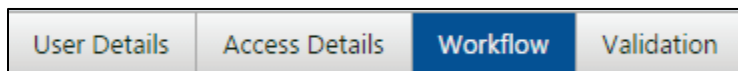
*Note: If there is no blank row visible in the grid, click the **+Add** button in the bottom left-hand corner to add one.*

This is a close-up screenshot of the bottom left corner of the 'Access Request' interface. The '+ Add' button is circled in red, indicating where to click to add a new row to the grid.

9. A pop-up window will appear. You may browse through the groups or use the search bar above to select your appropriate allotment code/agency.

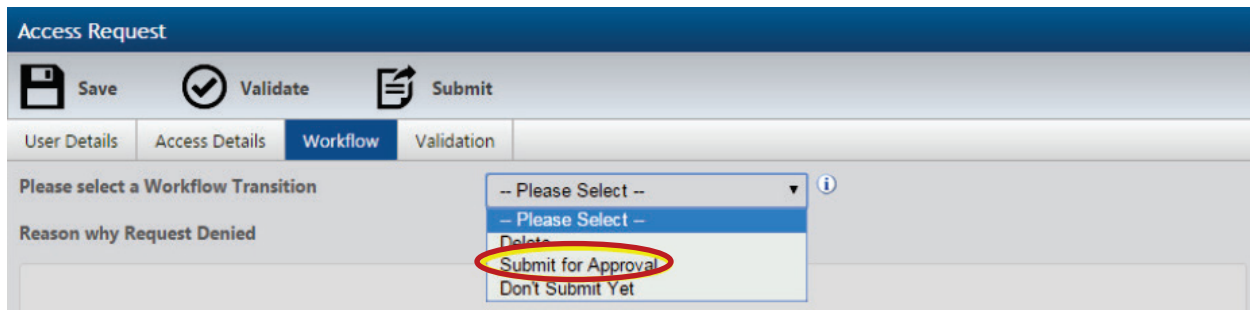
The screenshot shows the 'Access Request' application interface. The 'Access Details' tab is active, displaying a 'Requested Role' dropdown set to 'Agency Analyst'. Below this is a table for 'Requested Organizational Access' with one row. A pop-up window titled 'Select Value - Google Chrome' is overlaid on the table, showing a search interface with a search bar, a 'Search' button, and a 'Help' link. Below the search bar are buttons for 'Expand All', 'Collapse All', and 'Remove Value'. A list of organizational codes is shown: G1 - General Government, G2 - Education and THDA, G3 - Health and Social Services, G4 - Resources, Regulation, Business and Transportation, G5 - Law, Safety and Correction, and G6 - Capital Budget. The background application shows tabs for 'User Details', 'Access Details', 'Workflow', and 'Validation'.

10. If you are responsible for two or more allotment codes/agencies, you may add rows to the grid by clicking the **+Add** button.
11. When you have added all necessary codes/agencies to the grid, proceed to the **Workflow** tab.

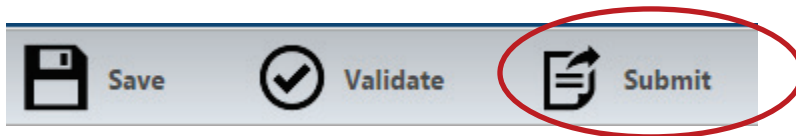


12. Select your desired workflow transition.

- **Submit for Approval** – Select this option to submit your Access Request for approval.
- **Don't Submit Yet** – Select this option if you are not ready to submit, e.g. you need to speak with your F&A Budget Analyst or Agency Approver to clarify your proper Access Details.
- **Delete** – Select this option to delete the Access Request.



13. Click **Submit** to enact your request.



Note: Your request will be approved, denied, or edited by your supervisor in the BEARS system. For example, an Agency Approver will approve an Agency Analyst's request. The access request can be sent back and forth between users for editing before final approval.

Note: An Agency Approver must be approved in the BEARS system in order to approve Agency Analyst requests. For that reason, please have all Agency Approvers request access first. Those requests will be approved by the F&A Budget Analyst.

B) Requesting access for BEARS without a RACFID

Note: If you do not have a RACFID, it may be likely that you already have a username and password that the Budget Office established manually in BEARS. It's recommended that you contact your F&A Budget Analyst before requesting access if you have not received a BEARS username.

1. Open your web browser and navigate to: home.bears.tn.gov. **Make sure your Pop-Up Blocker is turned off.**
2. When you are accessing BEARS from outside the state network, click the **Sign Up** button in the bottom left-hand corner. *Note: You will not be able to access BEARS inside the state network until you get a BEARS username. Typically users who are not part of the TN active directory will be outside the state network.*

<h3>Sign Up</h3> <p>If you are a user who is authorized and has business with the State Budget Office, such as authoring or approving budget submissions, but you do not have a State login, you may register for access to BEARS.</p> <p><input type="button" value="Sign Up »"/></p>	<h3>Contact Help Desk</h3> <p>If you would like more information on BEARS or need support, you can email or call the help desk.</p> <p><input type="button" value="Contact HelpDesk »"/></p>
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3. Complete the form fields appearing below and click the **Apply for Access** button to submit your request. Once submitted, you will be contacted by an F&A Budget employee to assist you in setting up your new username and password.

Welcome to the State of Tennessee Budget Entry and Analysis System (BEARS). If you are a State of Tennessee Active Directory User, you will already have access to the BEARS. Simply return to the login page and use your username and password.

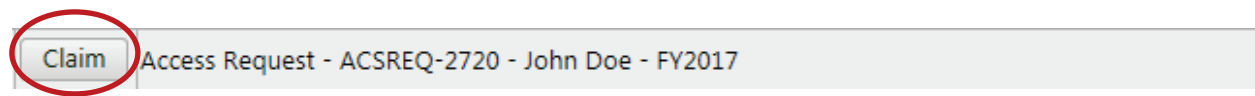
If you are not a State of Tennessee Active Directory User, you can apply for access to the BEARS by filling out the form below and clicking Submit. A member from the Finance and Administration team will contact you shortly.

First Name	<input type="text"/>	Last Name	<input type="text"/>
Email	<input type="text"/>	Your Role	<input type="text"/>
Agency	<input type="text"/>	Manager's Role	<input type="text"/>
Manager's Name	<input type="text"/>		
Manager's Email	<input type="text"/>		

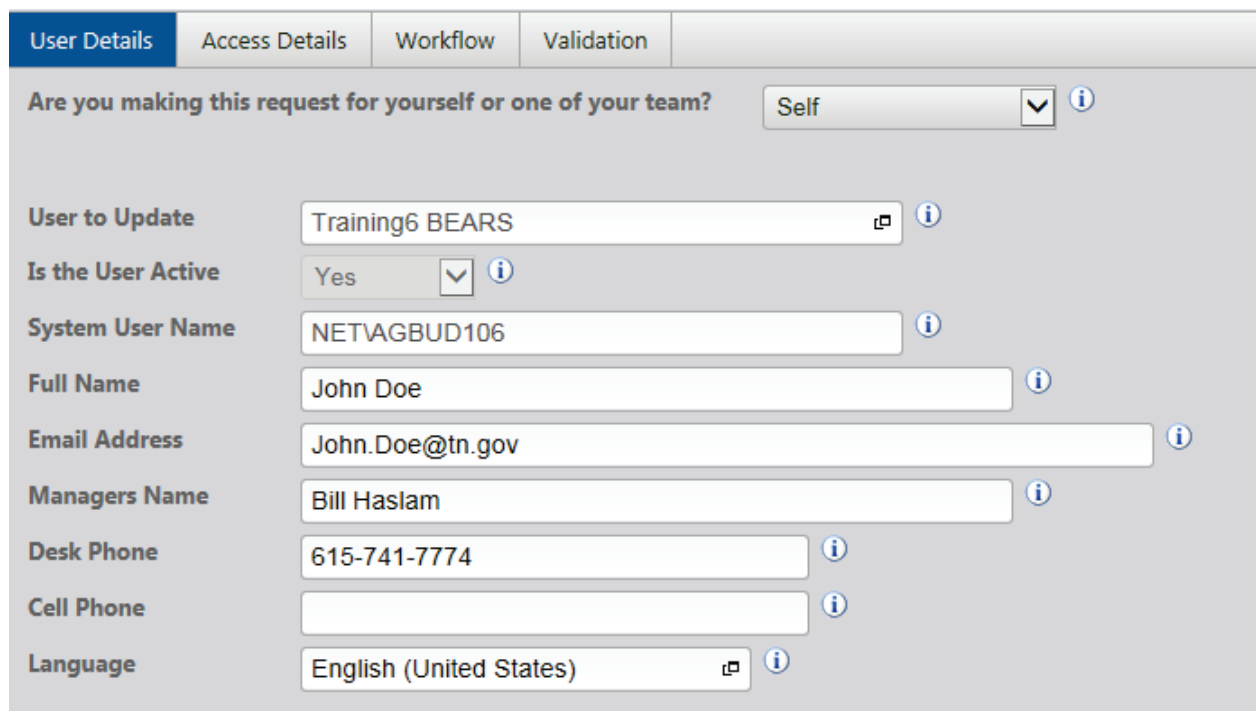
How Do You Approve Another User's Access Request?

All Agency Analysts will be approved for access to BEARS by an Agency Approver. An Agency Approver must first be approved for access by an F&A Budget Analyst before approving any Agency Analyst's request.

1. Once an Agency Analyst submits a request for access, a work item will appear in the **All Available Items** tab in the worktray for an Agency Approver.
2. Click **Claim** in order to view the item.



3. Review the information under the **User Details** tab.

A screenshot of the "User Details" tab in a system interface. The tab is highlighted in blue. Below the tab are several fields for user information. At the top, there is a question "Are you making this request for yourself or one of your team?" with a dropdown menu set to "Self" and an information icon. Below this are the following fields:

- User to Update:** Training6 BEARS (with a dropdown arrow and information icon)
- Is the User Active:** Yes (with a dropdown arrow and information icon)
- System User Name:** NETVAGBUD106 (with an information icon)
- Full Name:** John Doe (with an information icon)
- Email Address:** John.Doe@tn.gov (with an information icon)
- Managers Name:** Bill Haslam (with an information icon)
- Desk Phone:** 615-741-7774 (with an information icon)
- Cell Phone:** (empty field with an information icon)
- Language:** English (United States) (with a dropdown arrow and information icon)

- Review the information under the **Access Details** tab.

User Details | **Access Details** | Workflow | Validation

Requested Role: Agency Analyst

Requested Organization Access

	Requested Organization Access	
1	31702	Copy Delete

+ Add | Filter | Reset Filters | Refresh | Settings

- Proceed to the **Workflow** tab.

User Details | Access Details | **Workflow** | Validation

- Using the drop-down menu for Workflow Transition, select **Approve Request**.

Please select a Workflow Transition

Reason why Request Denied

Please Select
Approve Request
Reject Request

- Submit.**

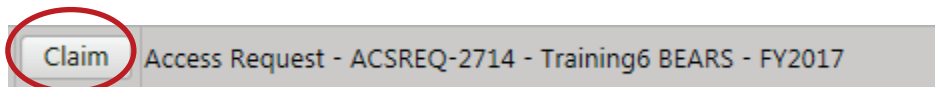
Submit

- The newly-approved user will now receive an automatically-generated email informing them of their approved access.

How Do You Modify Another User's Access Request?

A) During the Initial Access Request

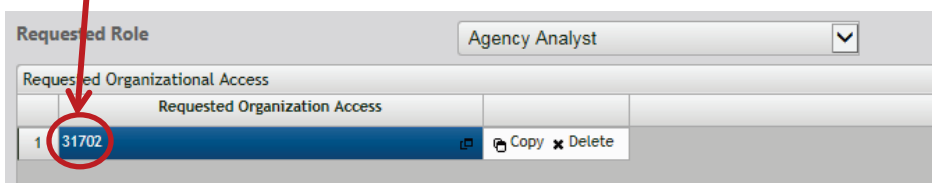
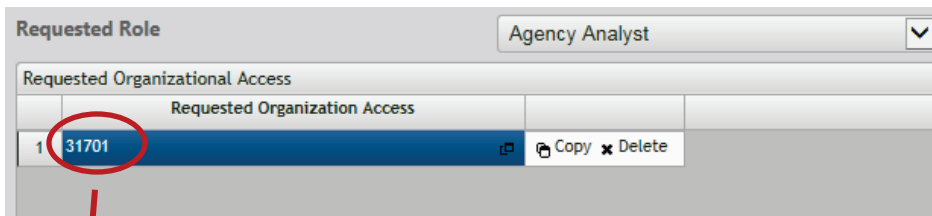
1. If an access request was submitted incorrectly, the Agency Approver has the ability to a) edit the request and then approve or b) send back to the Agency Analyst for editing.
2. Claim the request from the **All Available Items** tab in the worktray.



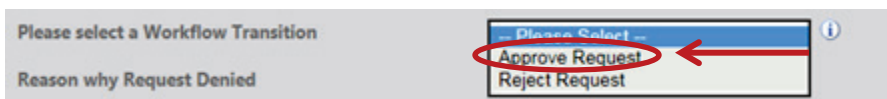
3. Review the **User Details** and **Access Details** tabs.

- a) To edit the request and then approve:

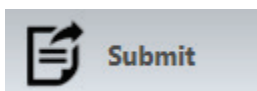
Make the appropriate changes.



Proceed to the **Workflow** tab and choose **Approve Request**.



Submit.



b) To send back to the Agency Analyst for editing:

Do not make the appropriate changes.

Proceed to the **Workflow** tab and choose **Reject Request**.

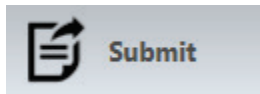
In the text box below workflow transition, explain the reason for denying the request.

Please select a Workflow Transition **Reject Request**

Reason why Request Denied

Incorrect allotment code.

Submit.



The user will now be able to see the access request item in the **All Available Items** tab in their worktray. The item will be at the "Draft" step.

	Work Item Name	Document Time	Step
<input type="button" value="Open"/>	Access Request - ACSREQ-2718 - Training6 BEARS - FY2017	6/9/2016 3:23:12 PM	Draft

Once the user has made the correct changes, they will submit the modified adjustment the same way they submitted it originally.

Please select a Workflow Transition **Submit for Approval**

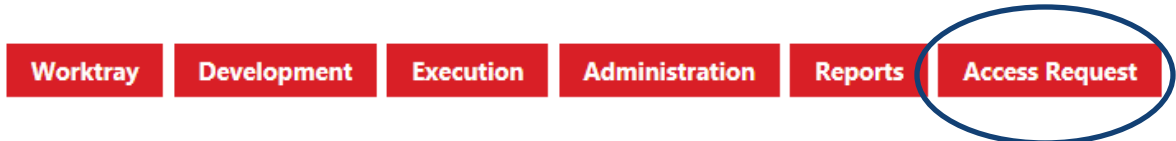
Reason why Request Denied

Incorrect allotment code.

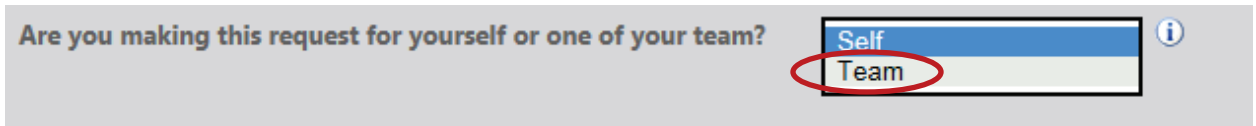
B) After the Initial Request Has Been Approved

If a current user's access needs to be modified for any reason, (e.g. leaving the workplace, transferring roles, etc.), their immediate BEARS supervisor has the ability to enact the changes.

1. As an Agency Approver, you can modify access for any Agency Analyst in your department.
2. Click on the **Access Request** tab.



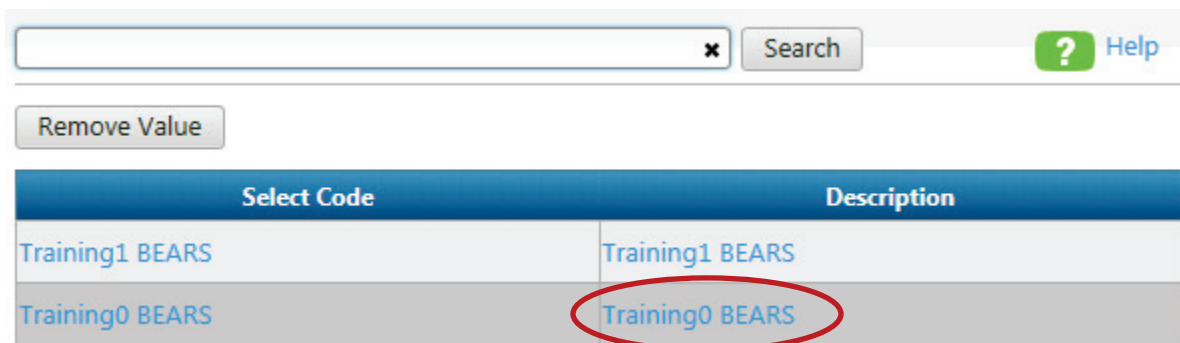
3. Under the drop-down menu for "Are You Making This Request for Yourself or One of Your Team?" click **Team**.



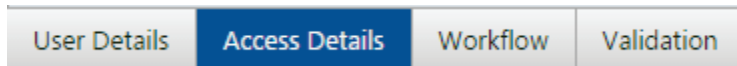
4. Click on the box for **User to Update**.



5. A pop-up will appear displaying all the users you are able to modify. Select the correct user.



6. Proceed to the **Access Details** tab.



7. Modify as needed.

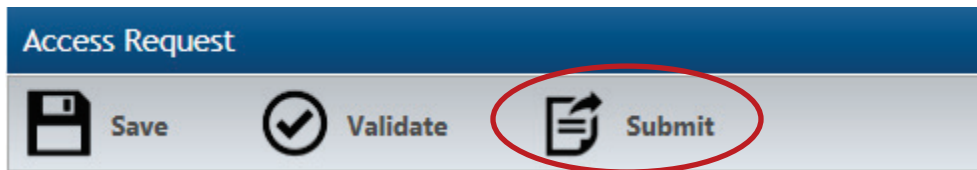
*Note: If you need to delete a user entirely, select 'No' for "Is This User Active?" in the **User Details** tab.*



8. Go to the **Workflow** tab and select **Submit for Approval**.



9. **Submit.**



10. At this point, the user's access modification request has been submitted, but has yet to be approved and enacted. In order to enact the changes, follow the "How Do You Approve Another User's Access Request?" module.