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.

- 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.
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Table of Contents

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

A) Requesting Access with a RACFID................................................................. 3

B) Requesting Access without a RACFID............................................................. 7

How Do You Approve Another User’s Access Request?........................................... 8

How Do You Modify Another User’s Access Request?

A) During the Initial Access Request....................................................................... 10

B) After the Initial Request Has Been Approved..................................................... 12
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.
6. Click on the Access Details tab. From the drop-down menu, select your requested role.

7. Once you have selected your role, a grid will appear below.

8. Click on the blue highlighted cell in the first row of the grid.

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

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](http://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.**

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.
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 work tray for an Agency Approver.

2. Click **Claim** in order to view the item.

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

![Access Details Tab](image)

5. Proceed to the **Workflow** tab.

![Workflow Tab](image)

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

![Workflow Transition Menu](image)

7. **Submit**.

![Submit Button](image)

8. 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.

![Reject Request](image)

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.

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

![Submit](image)
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.