Authorized Signatory Internet Portal (AS Portal) Reference Guide v1.0

How to enter and authorize a new security badge:

- 1. Log into AS Portal.
- 2. From the main dashboard screen after login, click on "New Applicant" which is located in the upper left-hand box labeled "Quick Links". See below.
- 3. The system will automatically direct you to another screen. Enter the information for the employee in the fields listed on this page. Refer to the "Data Entry Template" (available from the Badging Office) for instructions and to assist you in gathering the required information from your employee. Enter the information accurately. Data entry errors may delay badge issuance.
- 4. After all required fields have been completed on this page, click the "Next" button located on the bottom left-hand portion of this screen.
- 5. Using the drop-down list next to "Badge Type", select the badge type for this employee. Then, click the "Add" button.
- 6. If the employee is to be provided a "Privilege" in addition to their badge, click on the privilege and then click the "Add" button.
- 7. After the "Badge Type" and "Privileges" have been selected, click the "Submit" button at the bottom of the page.
- 8. Enter your PIN number in the box that appears and click the "Authenticate" button. By clicking "Authenticate" you are certifying that the individual is employed by your company and has a business need for a PDX Security Badge.
- 9. The system will automatically direct you to a screen with a form/application. Note: You do not need to print the application form shown on this page. A paper application is not required.
- 10. You have now completed your electronic approval for this new badge applicant. No Authorized Signatory signature is required.
- 11. Next steps in the application process:
 - a. If the AS Portal was used to enter the new applicant, the Authorized Signatory is <u>not</u> required to review the applicant's identity documents. However, the applicant must present their identification documents to the Badging Office.
 - b. The Authorized Signatory is responsible for informing the applicant how to proceed with the next steps in the application process. This will be done by providing the applicant with a document called "Electronic Security Badge Instructions (New Badge)". This document has step-by-step instructions for the applicant to follow for completing the badging process. The document can be obtained from the Badging Office.

	Reports	MySAFE	Employees	Employer								
	My Links											
Quick Links					Badge	Renewal Summ	iary	(Top 20)				
New Applicant)				UPID	Name		Employer	Badge Type	Exp Date		Do Not Rene
new reppiredite					7001614			Port Of Port	Secured	06/30/2015	Renew	Do Not Rene
Маназа Енирноуее	5				7001810			Port Of Port	Secured	06/30/2015	Renew	Do Not Ren
Audit Task					7002017			Port Of Port	Secured	06/30/2015	Renew	Do Not Ren
					7003044			Port Of Port	Secured	06/30/2015	Renew	Do Not Ren
Vehicle Permit Re	newal				7003228			Port Of Port	Secured	06/30/2015	Renew	Do Not Ren
					7003274			Port Of Port	Secured	06/30/2015	Renew	Do Not Ren
					7003685			Port Of Port	Secured	06/30/2015	Renew	Do Not Ren
					7003945			Port Of Port	Secured	06/30/2015	Renew	Do Not Ren
					7003949			Port Of Port	Secured	06/30/2015	Renew	Do Not Ren
					7003981		3	Port Of Port	Secured	06/30/2015	Renew	Do Not Ren
					7004090			Port Of Port	Secured	06/30/2015	Renew	Do Not Ren
					7004193			Port Of Port	Secured	06/30/2015	Renew	Do Not Ren

How to find out if a new employee's background check has been completed:

1. Background check information can be checked via the AS Portal:

To check if an employee's background has cleared:

- a. Log into SAFE.
- b. Using the **Employees** tab, search for and select the employee's record.
- c. If you see the text "Security Check Complete" or "Ready to Badge" in the banner area on the employee's record this means the employee's security check is complete. See screen print below for an example of the banner area text.
- d. When the background check is complete, the Authorized Signatory is responsible for notifying the employee and guiding them through the remainder of the badging process.

PORT OF PORTLANE	Logged on at:	14-Jun-2015	03:50 PM		🚭 Change Password Logout 🔞 Abou	t 🕜 He
	Reports	MySAFE	Employees	Employer		
	Personne	Audit V	ehicle Permit Re	newal		
General Occupation Privile			Review 8	& Print		
Employees -> Perso	onnel -> Gener	al				
Test Test 7018598	Pre-Enrolled				Security Check Complete	e i
General Details				Updated By : 9	SAFE Administrator, Jun 14 2015 6:40PM	
UPID	7018598			Additional Contact		
Last Name*	Test		<u>Alias</u>	SSN	*****1111	
First Name*	Test			Date of Birth*	**-***- 1982	
Middle Name				Place of Birth*	United States of America	
Occupation Status*	Pre-Enrolled	*		State (if USA)	California	
Application Date	14-Jun-2015			Citizenship*	United States of America	

How to renew a security badge:

- 1. Log into AS Portal.
- 2. From the main dashboard screen after login, a list of badgeholders who are due for badge renewal will be listed in the upper right-hand box labeled "Badge Renewal Summary (Top 20)".
- 3. Click on "Renew" next to the name of the badgeholder you are authorizing to renew. By clicking "Renew" you are certifying that the individual is employed by your company and continues to have a business need for a PDX Security Badge.
- 4. The system will automatically direct you to another screen. At the bottom of this screen click the button "Renew Employee Application".
- 5. Enter your PIN number in the box that appears and click the "Authenticate" button. Note: You do <u>not</u> print the application form shown on this page. A paper renewal application is <u>not</u> required.
- 6. You have now completed your electronic approval for the renewal of this badgeholder. No Authorized Signatory signature is required.
- 7. Next steps in the renewal process:
 - a. If the AS Portal was used to authorize the renewal of the badgeholder, the Authorized Signatory is <u>not</u> required to review the badgeholder's identity documents. However, the badgeholder must present their identification documents to the Badging Office.
 - b. The Authorized Signatory is responsible for informing the badgeholder how to proceed with the next steps in the renewal process. This will be done by providing the badgeholder with a document called "Electronic Security Badge Instructions (Renewal)". This document has step-by-step instructions for the badgeholder to follow for completing the renewal of their security badge. The document can be obtained from the Badging Office.
- 8. If "Do Not Renew" is selected instead of "Renew" in step #3 above, the badgeholder's name will disappear from the dashboard list, but the badge will not be deactivated.

PORT OF PORTLAND Possibility. In every direction.	Logged on at:	14-Jun-2015 0	3:50 PM		w change Pa	sswora 😈 Logout	About U	негр			
	Reports	MySAFE	Employees	Employer							
	My Links										
Quick Links					Badge I	Renewal Summary	(Top 20)				
New Applicant					UPID	Name	Employer	Badge Type	Exp Pate	Renew	Do Not Renew
new Applicant					7001614		Port Of Port	Secured	06/30/2015	Renew	Do Not Renew
Manage Employees					7001810		Port Of Port	Secured	06/30/2015	Renew	Do Not Renew
Audit Task					7002017	ĥ	Port Of Port	Secured	06/30/2015	Renew	Do Not Renew
Augur Tusk					7003044		Port Of Port	Secured	06/30/2015	Renew	Do Not Renew
Vehicle Permit Rene	ewal				7003228	1	Port Of Port	Secured	06/30/2015	Renew	Do Not Renew
					7003274		Port Of Port	Secured	06/30/2015	Renew	Do Not Renew
					7003685	5	Port Of Port	Secured	06/30/2015	Renew	Do Not Renew
					7003945		Port Of Port	Secured	06/30/2015	Renew	Do Not Renew
					7003949	1	Port Of Port	Secured	06/30/2015	Renew	Do Not Renew
					7003981	1	Port Of Port	Secured	06/30/2015	Renew	Do Not Renew
					7004090		Port Of Port	Secured	06/30/2015	Renew	Do Not Renew
					7004193	1	Port Of Port	Secured	06/30/2015	Renew	Do Not Renew

How to request to change a badgeholder's Badge Type (example: Secured to Sterile):

- 1. Log into AS Portal.
- 2. Using the **Employees** tab, search for and select the employee's record.
- 3. Click on the **Privileges** tab of the employee (see below).
- 4. Locate the line displaying the current Badge Type and click on the "Change" link (see below).
- 5. A box will appear where you will be required to enter:
 - a. The new Badge Type you are requesting for the employee.
 - b. The justification or reason for the change in Badge Type.
 - c. Your PIN to authorize the change.
- 6. You have now completed your electronic approval for the change in Badge Type. No Authorized Signatory signature is required.
- 7. Next steps in the process:
 - a. The badgeholder will be required to take Security Training related to their new Badge Type and they must present their identification documents to the Badging Office.
 - b. The Authorized Signatory is responsible for informing the badgeholder how to proceed with the next steps. Since the Badge Type change process is very similar to the badge renewal process, this can be done by providing the badgeholder with the "Electronic Security Badge Instructions (Renewal)". This document has step-by-step instructions for the badgeholder to follow for completing the process to schedule Security Training and present their identification documents to the Badging Office.

PORT OF PORTLA	ND Logged on a	t: 14-Jun-2015 0	3:50 PM			😳 Change Passwor	d 🚯 Logout	About Ø
	Reports	MySAFE	Employees	Employer				
	Person	102 Auurt Ma	ticle Permit Re	enewal				
General	Occupation	Privilege	5 Security	y Keys Acc	cess Cards	Review & Print		
Employees -> Per	rsonnel -> Pn.	leges		i.				
Smith Mary 7008	129 Active							Active
Employer/Occup	ation* Port Of P	ortland	•					
Badge Type*	Secured A	ea (Red)	*	Notes		Add V	/iew/Delete	
Privilege	Customs S EMS Movement Non-Mover	eal Red Area Driver	* E) *					*
Assigned Date	14-Jun-201	5						
			Add	Update			<u>Sł</u>	<u>iow History</u>
Employer/Occi	upation	Badge Type	Privileg	ge	Assigned	Datr Chai	nge	emove
Port Of Portland		Secured Area (Red) N/A			<u>Cha</u>	nge	Remove

How to report a badge Lost or Stolen:

Lost and stolen badges must be immediately reported to the Badging Office at (503) 460-4500 during regular business hours, or to the PDX Communication Center at (503) 460-4747 if after-hours.

How to request a replacement badge for a lost or stolen security badge:

Replacement badges for lost or stolen badges cannot be done through the AS Portal. Contact the Badging Office for information on the correct procedures for approving a replacement badge.

How to deactivate (or terminate) a security badge:

- 1. Log into AS Portal.
- 2. Using the **Employees** tab, search for and select the employee's record.
- 3. On the General tab of the employee: Change the 'Occupation Status' field to 'Terminated'. (see screen print below)
- 4. Click the 'Save' button at the bottom of the page.
- 5. Collect the employee's security badge and return it to the Badging Office.
- 6. If an employee has been issued a security key, collect the key and return it to the Badging Office.

	Reports	MySAFE E	mployees Em	ployer		
	Personne	l Audit Vehicle	e Permit Renewa	l.		
General	Occupation	Privileges	Security Keys	Access Cards	Review & Print	
imployees -> Perso	omel -> Gener	al				
Smith John 700731	6 Active					Activ
General Details				Updated By : SA	FE Administrator, Jun	14 2015 6:49PM
UPID	7007316		A	dditional Contact		
Last Name*	Smith	Alias	S	SN	*****1111	
First Name*	John		D	ate of Birth*	**-***- 1975	
Middle Name			P	lace of Birth*	United States of America	a
Occupation Status*	Active	-	S	tate (if USA)	Massachusetts	
Application Date	Active Suspended		c	itizenship*	United States of America	a
End Date	Fortimated		E	thnicity*	White	0
Email			I	Unknown, Please Specify)		

How to order a metal key through the AS Portal:

- 1. If your company is authorized for metal keys you can use the AS Portal to request keys.
- 2. Log into AS Portal.
- 3. Using the **Employees** tab, search for and select the employee's record who needs a key.
- 4. Click on the **Security Keys** tab of the employee (see below).
- 5. Select the Category, Asset Group, Asset Financial# and Quantity and then click the "Add" button.
- 6. Click the "Save" button at the bottom of the screen.
- 7. The system will update the key status to assigned when the key is ready for pickup in the Badging office.

	Reports	MySAFE	Employees	Employer	•		
	Personne	Audit Veh	icle Pranie Re	incare l			
General	Occupation	Privileges	Security	Keys A	ccess Cards	Review & Print	
nployees ->	Personnel -> Secur	ity Keys					
mith Mary 70	008129 Active						Active
nployer/Occ	upation* Port Of Po	rtland	•				
equest for Me	etal Keys						
ype*	Metal Key		Res	et	Asset Financial#*		•
ategory*	Select		*		Quantity		
sset Group			• 0		Justification		*
ey code							
							-
		_					
			Add Up	date	History	<u> </u>	
	Asset	Key		and a strength of the local division of the		Contract Contractor 14	Romour

How to get help on using the AS Portal:

Contact the Security Badging Office by phone at (503) 460-4500 or by email at PDXBadgingLostandFound@portofportland.com.