# Authorized Signatory Internet Portal (AS Portal) Reference Guide v2.0

#### 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.
- 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 <u>not</u> need to print the application form shown on this page. A paper application is <u>not</u> 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.



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# 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:

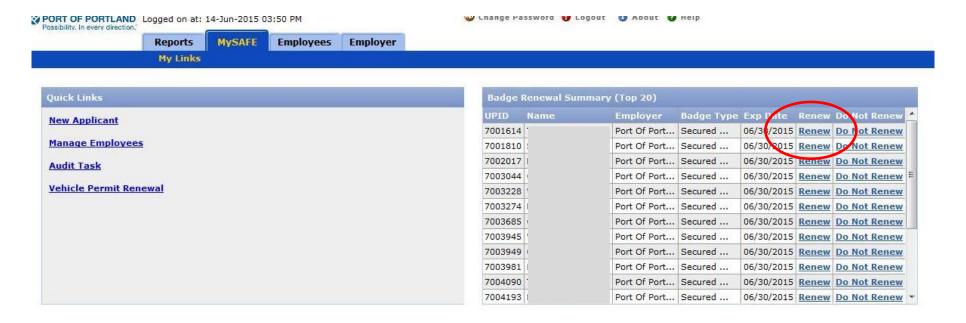
- a. Log into SAFE.
- b. Using the **Employees** tab, search for and select the employee's record.
- c. If you see the text "Security Check Complete" or "Ready to Badge" in the banner area on the employee's record this means the employee's security check is complete. See screen print below for an example 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.



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# How to renew a security badge:

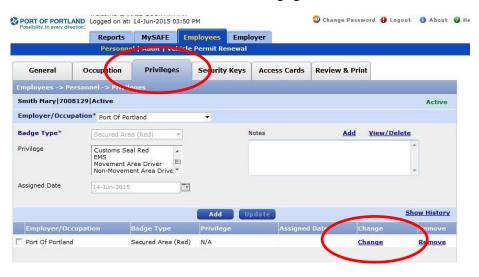
- Log into AS Portal.
- 2. From the main dashboard screen after login, a list of badgeholders who are due for badge renewal will be listed in the upper right-hand box labeled "Badge Renewal Summary (Top 20)".
- 3. Click on "Renew" next to the name of the badgeholder you are authorizing to renew. By clicking "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 not print the application form shown on this page.* A paper renewal application is not 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.



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

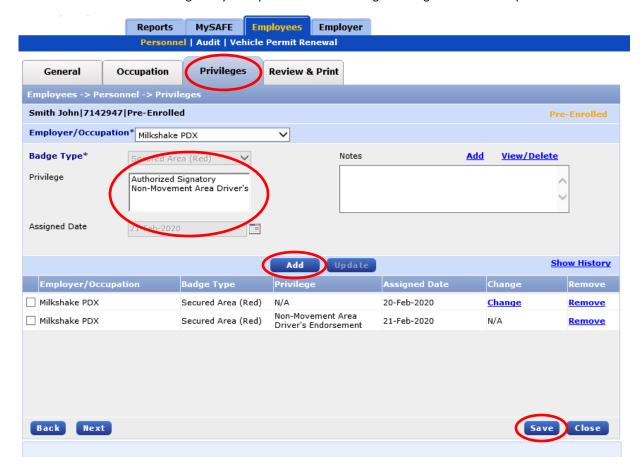
- 1. Log into AS Portal.
- 2. Using the **Employees** tab, search for and select the employee's record.
- 3. Click on the **Privileges** tab of the employee (see below).
- 4. Locate the line displaying the current Badge Type and click on the "Change" link (see below).
- 5. A box will appear where you 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.



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# How to add a privilege (example: Non-Movement Area Driver's Endorsement):

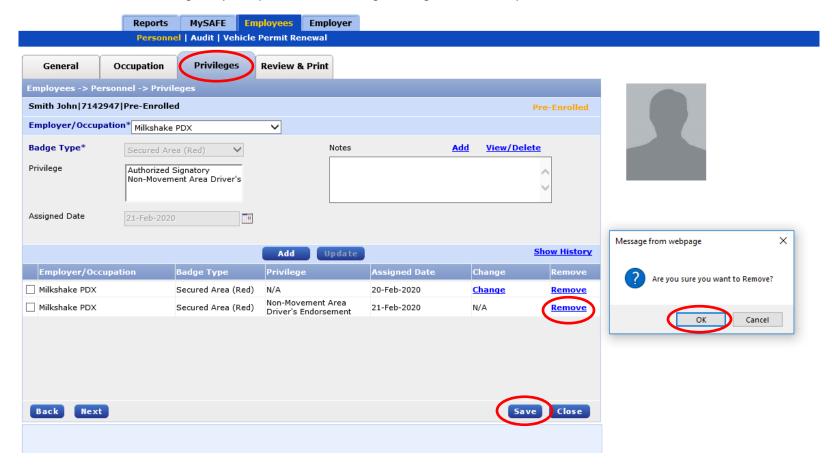
- 1. Log into AS Portal.
- 2. Using the **Employees** tab, search for and select the employee's record.
- 3. Click on the **Privileges** tab of the employee (see below).
- 4. Locate the box showing available privileges, select the privilege you would like to add, select the add button, then save the record (see below).
- 5. You have now completed your electronic approval for adding a privilege to a badgeholder's badge. No Authorized Signatory signature is required.
- 6. Next steps in the process:
  - a. The badgeholder may be required to take training related to their new privilege. The badgeholder or Authorized Signatory must contact the Badging Office to schedule an appointment for the required training to be completed.
  - b. Some trainings require a hands-on portion that must be scheduled after the computer-based portion is complete.
  - c. The Authorized Signatory is responsible for informing the badgeholder how to proceed with the next steps.



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# How to remove a privilege (example: Non-Movement Area Driver's Endorsement):

- 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).
- Locate the privilege you would like to remove from the current privileges and select the remove option (see below).
- 5. A box will appear asking if you would like to remove the privilege, select ok, then save the record. No Authorized Signatory signature is required.
- 6. The Authorized Signatory must direct the employee to come to the Badging Office to have their badge reprinted.
  - a. The Authorized Signatory is responsible for informing the badgeholder how to proceed.



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#### 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:

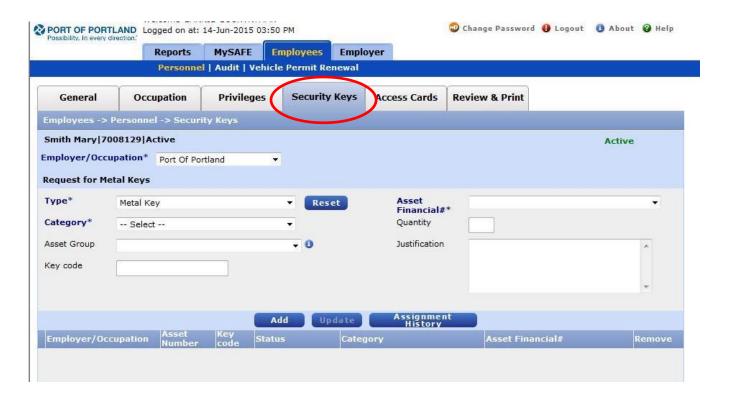
- 1. Log into AS Portal.
- 2. Using the **Employees** tab, search for and select the employee's record.
- 3. On the General tab of the employee: Change the 'Occupation Status' field to 'Terminated'. (see screen print below)
- 4. Click the 'Save' button at the bottom of the page.
- 5. Collect the employee's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



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# How to order a metal key through the AS Portal:

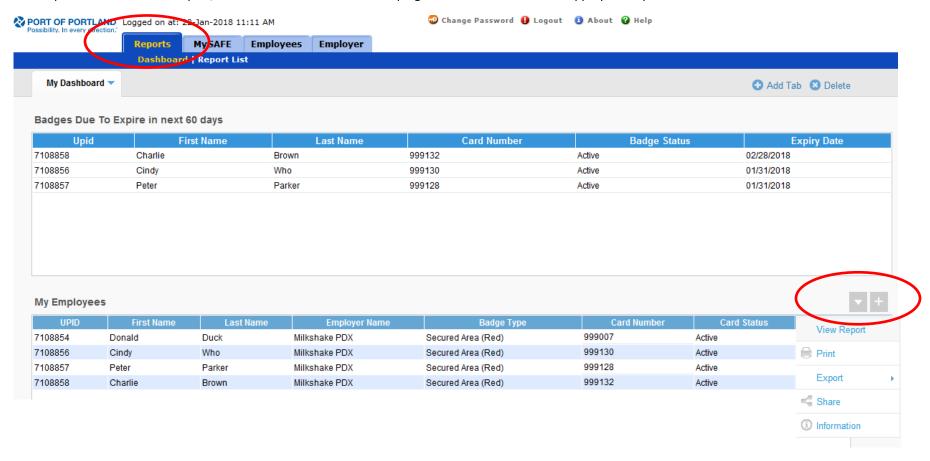
- 1. If your company is authorized for metal keys you can use the AS Portal to request keys.
- Log into AS Portal.
- 3. Using the **Employees** tab, search for and select the employee's record who needs a key.
- 4. Click on the **Security Keys** tab of the employee (see below).
- 5. Select the Category, 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.



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# How to run an active badge report:

- 1. Log into AS Portal.
- 2. Click on the Reports tab, active badges will be listed under My Employees.
- 3. To print or download the report, click on the down arrow at the top right of the list and select the appropriate option.



# How to get help on using the AS Portal:

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

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