How to Approve an Access Request as a Supervisor or Access Administrator

STEP-BY-STEP INSTRUCTIONS	HELPFUL HINTS
Navigate to **Penn eForms** (https://provider.www.upenn.edu/ computing/da/eforms/index.html).	Supervisors and other approvers such as Access Administrators can also access forms that need their approval by following the links on individual **eForms** notification emails.
Click on **[eForms action list]** in the left navigation bar. For Supervisors and Administrators ▸ eForms action list ▸ Approving access requests ▸ Tracking request status	You will be prompted for your PennKey and PennKey password unless you already have a Penn WebLogin session open.
Select the form **[Type]** (*FIGURE 1, #2*) you want to review by clicking its **[Id]** number (*FIGURE 1, #3*) in the first column.	• You can click on the **[Log]** icon in the last column to view the routing of the request to date. (*FIGURE 1, #4*) • **Note** the navigation area directly above the table of requests and make sure you are aware of multiple pages of requests. (*FIGURE 1, #1*)
Review the form(s) individually for accuracy and appropriateness of access level(s) requested (e.g., ORGs, Principal Investigators, responsibilities, etc.)	
Select the appropriate school or center, using the drop down list in the **Supervisor Action** area of the form. (*FIGURE 2, #1*)	**Supervisors (If approving):** • A School/Center Access Administrator must be selected before approving the eForm. ———————————————————— **Supervisors & Access Administrators (If not approving):** • **[disapprove]** button rejects the request permanently and routes the form back to the Requester. Once the form has been disapproved, the form can no longer be modified and the Requester will need to submit a new form. • **[return to previous]** button allows the current approver (Supervisor or Access Administrator) to route it back to a previous level for further action. • **Supervisors** may use the **[return to previous]** button to route the form back to the Initiator. • **Access Administrators** may use the **[return to previous]** button to route the form back to the Supervisor or the Initiator. • **Note** that for both of these actions (**Disapprove** and **Return to Previous**), it is important to save a comment/note explaining your concern. Enter the comment in the **Create Note** area and click the **[save]** button.

If all is in order, click the **[approve]** button in the **Form Routing** section (*Figure 2, #3*).	**Supervisors:** • This routes the form to the appropriate School/Center Access Administrator. **Access Administrators:** • This routes the form to the next approver. [i.e.: for BEN Financials Access Request form, if a PO responsibility was requested, the form would route to the PO System Administrators for approval. If only non-PO responsibilities are being requested, the form, once approved by the Access Administrator, would route to the Financial Systems group for processing.] • *FIGURE 2, #3* shows location of **approve/disapprove/return to previous** buttons.

Notes:
- Summary information about the request can be seen in the upper right corner of the request form. (*above FIGURE 2, to the right*)
- The data in the **Requestor Information** at the top of the eForm is **NOT editable** by approvers.
- If you wish to include a note as you review the form, enter it in the **Note** area and click the **[Save]** button. The form and note will be saved, and then you can click the appropriate button to advance it in the workflow. (*FIGURE 2, #2*)
- You may review the form status by returning to your action list and clicking the link for the **[Outbox]** (*FIGURE 1, #5*) or by clicking on the **[Log]** icon. (*FIGURE 1, #4*)

FIGURE 1: **Action List screen, selected from the left navigation bar link**.

Action List | Outbox ⑤

3 items retrieved, displaying all items. ①

#1 – Check here to see if there are multiple screens of items.

Id	Type ②	Route Status	Action Requested	Initiator	Delegator	Date Created	Group Request	Log
5884	GAR access	EXCEPTION	COMPLETE	Thomas A Davis (Tad) (davist, 10033223) (active) Staff - Isc Administrative Systems Tools And Technologies - Data Warehouse Architect		10:47 AM 12/14/2011	kualiSuperUsers	🔍
5885	GAR access	EXCEPTION	COMPLETE	Thomas A Davis (Tad) (davist, 10033223) (active) Staff - Isc Administrative Systems Tools And Technologies - Data Warehouse Architect		11:10 AM 12/14/2011	kualiSuperUsers	🔍
5989	BEN Financials Access Request Form	ENROUTE	APPROVE	Janet C. Smith (smithjc, 10051662) (active) Staff - Vice Provost For Research - Director Of Research Compliance Education (also: Alumni)		01:15 PM 02/09/2012		🔍

③ **#3** -- Click the Id number of the form type that you need to approve. This opens the eForm so that you can review all the details.

④ **#4** – Review the form status by clicking here or on the Outbox (#5 above).

Summary info can be seen here in upper right of the eForm screen.

Form name:	BEN Financials Access Request Form
Form status:	ENROUTE
Create date:	12:08 PM 02/08/2012
Document ID:	8896

Figure 2: BEN Financials Access eForm ready for approvals.

BEN Financials Access Request Form

Requester Information

This form must be completed by the person requesting access to BEN Financials. Supervisors may submit a form to 'Delete a Logon ID' on behalf of their former employee. **Note to Supervisors:** To initiate a request on behalf of another person, use the Find Person Button to select that individual. Please complete the fields below, and then click the submit button to initiate your request. Fields with an asterisk (*) are required.

On behalf of Penn ID*   10051662

On behalf of* (auto filled from above)   Janet C. Smith (smithjc, 10051662) (active) Staff - Vice Provost For Research - Director Of Research Compliance Education (also: Alumni)

Affiliation Type*   ● Employee ○ Consultant

Request*   ● New Logon ID ○ Delete Logon ID ○ Change Application Access

Department*

#1 -- Supervisors must select the appropriate School/Center Administrator with this drop down.

Supervisor Action

For Supervisor use only. Please select the appropriate School/Center Access Administrator from the list.

School/Center Access Administrator*   (19) Annenberg Center

Form Routing

To add a comment to your request or approval action, enter it in the Note field provided and click the **save** button.
Click the appropriate button (**submit, approve, disapprove**, etc.) to submit the form for continued processing in the workflow.

Create Note			
Author	Date	Note	Action
Debra L Doll (convery, 10254696) (active) Staff - Administrative Information Technology And Data Admin - Programmer Analyst (also: Student)	02/09/2012		save

[approve] [disapprove] [return to previous] [Initiator ▼]

Implementation Notes

are complete:

Partially Met ☐   See T

#3 – The buttons to approve or not. Note the addition of a **[return to previous]** button as well!

#2 – Additional approver notes can be added here. Make sure to click **[save]!**

ID Assigned (PennKey)   smithjc

Contact Information

Financial Systems
BEN Helps 6-HELP or 215-746-4357

Figure 3: Screen to review the form status by looking at the Route Log (clicking on Figure 1, #4).

Route Log   refresh

ID: 5989   ▾ hide

Title	Routing Document Type 'benFinancialsAccessRequestForm'		
Type	BEN Financials Access Request Form	Created	01:15 PM 02/09/2012
Initiator	Janet C. Smith (smithjc, 10051662) (active) Staff - Vice Provost For Research - Director Of Research Compliance Education (also: Alumni)	Last Modified	01:25 PM 02/09/2012
Route Status	ENROUTE	Last Approved	
Node(s)	financialSystemsNode	Finalized	

Actions Taken   ▾ hide

	Action	Taken By	For Delegator	Time/Date	Annotation
▸ show	COMPLETED	Janet C. Smith (smithjc, 10051662) (active) Staff - Vice Provost For Research - Director Of Research Compliance Education (also: Alumni)		01:17 PM 02/09/2012	
▸ show	APPROVED	Debra L Doll (convery, 10254696) (active) Staff - Administrative Information Technology And Data Admin - Programmer Analyst (also: Student)		01:23 PM 02/09/2012	
▸ show	APPROVED	Gary W Delson (gdelson, 23091843) (active) Staff - Information Systems & Computing - Executive Director - Finance, Planning & Hr		01:25 PM 02/09/2012	

Pending Action Requests   ▾ hide

	Action	Requested Of	Time/Date	Annotation
▸ show	IN ACTION LIST APPROVE	financialSystemsImplementors	01:25 PM 02/09/2012	