

How to Track an Access Request's Status as a Requestor

| Step-by-Step Instructions | HINTS |
|---|---|
| Navigate to Penn eForms (https://provider.www.upenn.edu/computing/da/eforms/index.html) | <ul style="list-style-type: none"> ▪ eForms consist of several sections for Requester Information, Supervisor Action, Form Routing, etc. ▪ As the form progresses along its routing paths, various fields will become editable or complete. |
| Click the [My eForms status] link to access the list of all eForms you have submitted. (FIGURE 1, #1) | Forms, represented by their unique [Document/Notification ID] , are displayed (most recently submitted appear first), along with their current status and creation date. |
| Check Route Status column for quick request status information. | FIGURE 1, #3. |
| Click on the appropriate [Document / Notification ID] number for request details. (FIGURE 1, #2) | <ul style="list-style-type: none"> • This enables you to view the form in its entirety, with fields as they currently stand. • It does NOT allow you to edit any fields; this is for viewing only. |
| Click the icon in the [Route Log] column. (FIGURE 1, #4), | <p>On the [Route Log] screen (FIGURE 2), you can view the routing history for the form, including:</p> <ul style="list-style-type: none"> • Actions taken (with status, person by whom the action was taken, and when it occurred; FIGURE 2, #1) • Pending Action Requests (the action that is pending, the person or routing level of whom it is requested, and when it was routed to that person or level; FIGURE 2, #2) |
| <p>Notes:</p> <ul style="list-style-type: none"> • You may use the fields at the top of the My eForms Status page to narrow the list by date submitted (From/To), type of form, or even a particular document ID (FIGURE 1, #5, green highlighted area). • There are Export Options for the list of your submitted requests (FIGURE 1, #6). Please use the 'Spreadsheet' option only. Note: The column 'Route Log' in the results is not helpful. • If you are an approver for or have view access to an eForm, you may also view the status of other individuals' requests <ul style="list-style-type: none"> - The steps are the same as those noted above, but since the [My eForms status] link defaults to showing your own requests, you'll need to alter the search fields to look for another initiator (by PennKey); search for form to which you have access by date (From/to), etc. | |

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FIGURE 1: [My eForms status] page.

Document Lookup ? ▼ * required field

Type:

Initiator:

Document/Notification Id:

Date Created From:

Date Created To:

Name this search (optional):

3 items found. Please refine your search criteria to narrow down your search.

3 items retrieved, displaying all items.

| Document/Notification Id | Type | Route Status | Initiator | Date Created | Route Log |
|--------------------------|--------------------------|--------------|---|---------------------|-----------|
| 3959 | LMS access | ENROUTE | Janet C. Smith (smithjc, 10051662) (active) Service Provider - Isc-Ait (also: Alumni) | 02/28/2011 11:30 AM | |
| 3823 | General Ledger access | CANCELED | Janet C. Smith (smithjc, 10051662) (active) Service Provider - Isc-Ait (also: Alumni) | 02/18/2011 01:04 PM | |
| 3811 | Salary Management access | CANCELED | Janet C. Smith (smithjc, 10051662) (active) Service Provider - Isc-Ait (also: Alumni) | 02/16/2011 04:23 PM | |

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

FIGURE 2: [Route Log] for one request.

Route Log refresh

ID: 3959 hide

| Title | Routing Document Type 'lmsAccessForm' | |
|--------------|---|-----------------------------------|
| Type | LMS access | Created 11:30 AM 02/28/2011 |
| Initiator | Janet C. Smith (smithjc, 10051662) (active) Service Provider - Isc-Ait (also: Alumni) | Last Modified 11:33 AM 02/28/2011 |
| Route Status | ENROUTE | Last Approved |
| Node(s) | supervisorNode | Finalized |

1 hide Actions Taken

| Action | Taken By | For Delegator | Time/Date | Annotation |
|--|---|---------------|---------------------|------------|
| <input type="button" value="show"/> COMPLETED | Janet C. Smith (smithjc, 10051662) (active) Service Provider - Isc-Ait (also: Alumni) | | 11:33 AM 02/28/2011 | |

2 hide Pending Action Requests

| Action | Requested Of | Time/Date | Annotation |
|---|---|---------------------|------------|
| <input type="button" value="show"/> IN ACTION LIST | Amy A. Miller (milleraa, 10094590) (active) Staff - Isc - Ait & Data Admin - Sr It Project Leader | 11:33 AM 02/28/2011 | |