**How to Request or Change BEN Reports Access Status**

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<th>STEP-BY-STEP INSTRUCTIONS</th>
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| Navigate to Penn eForms ([http://www.upenn.edu/computing/da/eforms/index.html](http://www.upenn.edu/computing/da/eforms/index.html)) | • 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 link with the appropriate form name to begin your request. | You will be prompted for your PennKey and PennKey password unless you already have a Penn WebLogin session open. |
| Indicate in the Privilege Change area (§2 on page 2) whether you’re requesting a new account, or change to/termination of an existing account. |  
• Requestor info (Name, title and contact info) is auto populated into the form using Penn ID. (See §1 on page 2)  
• Radio buttons: New ID, Change privs, and Remove privs.  
• Expiration Date should be entered for consultant/temporary accounts. |
| Identify your Supervisor by PennKey, name, or Penn ID using the [Find Supervisor] button (§3). | Once completed and submitted by the requester, the form will be routed to the supervisor for review and approval. |
| Use the [Find org] button (§4) to identify the organization(s) to which you are requesting access. |  
• Access to some data collections and systems is secured by organization.  
• If a parent ORG exists for the organizations you wish, select that parent ORG.  
• NOTE: ORG and the GL form are just one example of a level of access you may be asked to indicate. Some forms don’t have ORGs or have other things instead like PIs, school, division. |
| Indicate your acceptance of the confidentiality agreement by checking the “I will abide by this policy” box. (§5) | REQUIRED! |
| Click the [Submit] button (§6) in the Form Routing section. |  
• The form status (visible at the top right corner of the form screen) will change to 'ENROUTE' once the form has been submitted.  
• It first gets routed to your supervisor. |

**Notes:** If you wish to include a comment as you submit the form, enter it in the Note area (§7) in the Form Routing section and click the [Save] button.
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BEN Reports Access Request Form: General Ledger Data

Requester Information:

Please complete the fields below, and then click the submit button to initiate your request. Fields with an asterisk (*) are required. By default, the form will be initiated for the person creating the request. To initiate a request on behalf of another person, use the Find Person button to select that individual.

NOTE:
- If you already have access to General Ledger data in the Data Warehouse or BEN Financials, you are automatically able to access Financial reports via BEN Reports, and should not complete this form.
- If you do not have and will not be getting access to BEN, specify level of access desired by selecting OGS in the fields provided below. Chart of Accounts training is the prerequisite for users without access to BEN Financials.

1. On behalf of Penn ID (auto filled from above)
   - 10051662
   - Find person

2. Privilege change:
   - New access
   - Change priv

3. Expiration date (yyyy-MM-dd)
   - [Input]
   - [Input]

4. Supervisor Penn ID (auto filled from above)
   - [Input]
   - Find supervisor

Please specify level of access desired by selecting OGS in the fields provided below.

5. Org
   - [Input]
   - [Input]

6. Supervisor Action:

   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.

7. Implementation Notes:

   For internal IUC use only. The following implementation actions are complete:

Certified training attendance
BEN Reports access