# How to Request or Change Data Warehouse 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.  
• If you're requesting change/termination of an existing account, please enter the account ID (e.g., Data Warehouse Oracle ID).  
• Expiration Date should be entered for consultant/temporary accounts. |
| Indicate the type of access. | • See #3 on page 2 - Business Objects = InfoView AND Webi; InfoView only; Other  
• NOTE: Types of access offered vary with type of form. |
| Identify your Supervisor by PennKey, name, or Penn ID using the [Find Supervisor] button (#4). | Once completed and submitted by the requester, the form will be routed to the supervisor for review and approval. |
| Use the [Find org] button (#5) 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.  
• If you have a BEN Financials ID, add it here too.  
• 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. (#6) | REQUIRED! |
| Click the [Submit] button (#7) 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 (#8) in the Form Routing section and click the [Save] button.
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Access Request Form: Data Warehouse General Ledger Collection

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.

1. Find person
2. Privilege change
3. Type of access
4. Find supervisor

Access to General Ledger collection will be granted with the same organization access as F&I Financials. Please fill in your F&I Financials ID in the following field. OR, if you do not have an ID and will not be getting access to F&I, specify level of access desired by selecting ORID in the fields provided below. Chart of Accounts training is the prerequisite for users without access to F&I Financials.

5. Find org
6. I will abide by this policy

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

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.

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