

## **BEN FINANCIALS Access Instructions**

Regional Business Office personnel hired by Business Operations are generally required to perform multiple activities as part of their job duties and should obtain access to certain responsibilities in BEN Financials, the University's accounting and primary purchasing system. Business officers are eligible to obtain the following responsibilities in BEN:

- PO Manager

Create, manage, or approve the purchase of goods and services from approved suppliers.

- Non-PO Payment Request and Credit Memo Request - Preparer

Create and manage Non-PO Payment Requests (formerly PDA Forms) for suppliers not approved in the PO system.

- Non-PO Payment Request and Credit Memo Request – Approver

Approve Non-PO Payment Requests (formerly PDA Forms).

- Web ADI TEM Maintenance

Assign/edit default reviewers and default funding sources in Concur for students, faculty and staff; assign Level approvers to funding sources; add new account combinations.

- Accounting responsibilities (for general financial management)

- Journal Entry – General, Special, G&C, Budget
- GL Inquiry
- GL Reporting
- Freeze and/or Freeze/Unfreeze Grant

### **How to obtain access**

All BEN responsibilities described above require the successful completion of either on-site or online training. Please consult the document “Financial-Training-and-System-Access-Requirements” for information regarding the list of required training courses.

After completion of the required training, you may submit a BEN Financials eForm to obtain access to the system. You can complete a form for each training you complete or wait until all training is completed and request all access at once. ***Please note that you must submit the access form within 60 days of completing the training or you may be required to re-take the course(s).***

[Click here to submit your eForm after training](#)

Follow the instructions in the following pages ...

Once you are on the Penn Eforms webpage, click on the + sign to the left of BEN Financials and Penn Marketplace:

- BEN Financials and Penn Marketplace
- Data Warehouse
- Knowledge Link (LMS)
- OpenData APIs
- Research Reports (formerly known as BEN Reports)

Click on BEN Financials Access Request eForm:

- BEN Financials and Penn Marketplace
  - eForms
    - [BEN Financials Access Request eForm](#) (and Penn Marketplace Non-PO Payment Requests and Web ADI TEM Maintenance eForm)
    - [BEN Financials ID/Name Change Request eForm](#)
    - [BEN Financials Printer Registration eForm](#)
    - [CREF-PI Mapping](#)

Fill out the Requester Information (note: some of it is prepopulated once you log in with your Pennkey) and request access as follows:

- PO Manager

Click on the “Add” button. Fill in the dollar limit approval authority (provided to you by your supervisor). As a PO Manager, you will need a default approver who will review each PO you submit and/or approve. This approver is also a member of the regional business office and is also provided to you by your supervisor. After you obtain the name, click on “Find Default Approver” and select it by using the search box.

### **Requested Access-BEN Buys**

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**PO Manager**  Add  Remove  Clear *(Includes Requisitioner Responsibility)*

**Dollar Limit Approval Authority \$\***

*If PO Manager responsibility is being deleted, please provide a user name to which purchasing alerts will be sent*

**User Name**

**Requisitioner**  Add  Remove  Clear

**Default Approver Penn ID\***

- Non-PO Payment Request and Credit Memo Request – Preparer

*Click on the “Add” button.*

- Non-PO Payment Request and Credit Memo Request – Approver

*Click on the “Add” button. A section will appear to list the orgs you will be the approver for. Please list the parent org associated with your business office.*

<b>Business Office</b>	<b>Parent Org (s)</b>
Advancement	EXTA
Chemistry	CHEB
CAJS	CAJS
Cohen Hall	LOGN
DRL	DRLB
Fisher-Bennett	FBBA
Grad Division	GRAD
LDC	LDCB
Life Sciences	BIOB, PSYC
Market Street	PCED
McNeil	MCNL
Netter Center	0155
SAS Finance	DEAP, DEAA
Williams Hall	WLMS

*Select Non-PO Approver level (\$5K; if you are the Manager also add \$50K)*

- Web ADI TEM Maintenance

*Click on the “Add” button.*

- Journal Entry – General, Special, G&C Cost Transfers

*Click on the “Add” button.*

- Journal Entry – Budget; GL Inquiry; GL Reporting; Freeze/Unfreeze Grants

*Click on the “Add” button. A section will appear to list the orgs you will be the approver for. Please list the parent org associated with your business office. **Note: you may also request access to the business office org if approved by your supervisor; if so, he/she will let you know the numeric org value to list in addition to the parent.***