

## **BEN FINANCIALS Access Instructions**

Administrative personnel hired by Departments/Centers and who are generally required to perform procurement activities as part of their job duties should obtain access to certain responsibilities in BEN Financials, the University's accounting and primary purchasing system. Administrators are eligible to obtain the following responsibilities in BEN:

- Requisitioner

This access is intended for administrative and support staff of the University who will need the ability to submit office or lab orders through the Penn Marketplace, as well as the ability to place custom, service, and special request orders.

- Invoice Inquiry

This access is intended for administrative and support staff of the University who require access to BEN Financials for researching invoices, payments, and supplier information.

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

This access is intended for administrative and support staff of the University who are responsible for the creation and management of Non-PO Payment Requests (formerly PDA Forms).

### **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:

- Requisitioner

Click on the “Add” button. As a Requisitioner, you will need a default approver who will review each requisition you submit. This approver is a member of the regional business office that oversees your department and is provided to you by the Manager of Administration and Finance. 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\***

- Invoice Inquiry

*Click on the “Add” button.*

### **Requested Access-BEN Pays**

**Invoice Inquiry**  Add  Remove  Clear

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

*Click on the “Add” button. Please insure you click the Add button next to Preparer and NOT in the Approver line.*

### **Requested Access-Penn Marketplace Non-PO Payment Requests**

*Non-PO Payment Request and Credit Memo Request Access:*

**Preparer**  Add  Remove  Clear

**Approver**  Add  Remove  Change Org List  Clear