

Overview

Review and approval of access requests take place fully electronically within PennERA. The review consists of the following:

- Assignee Supervisor (chosen in the request form)
- School/Center Access Administrator
- Module Administrator for the specified request (PD/PT, Routing Assignment, HSM, LAM)
- The PennERA Security Administration team

Reviewing and Approving an Access & Routing Request

The review for a request takes place in the Review Dashboard, similar to a proposal review.

- Once a request is submitted for review, a notification is sent to the first reviewer. This notification is received 3 ways: an email to the individual's UPenn address inbox (as identified in their PennERA profile), an internal notification to their PennERA Messages, and from their PennERA Assignments list. All methods contain a link to the Review Dashboard.
- The review is linear and subsequent steps will not send out notifications until the current step has completed.

Review Dashboard

- During the review process, the reviewer may make changes to the request by clicking the link to the form in the dashboard.

Access Request - Access Request

Number: [62](#)

Title: New Access Request Created for CHRISTIAN BITTO on 2/20/2020 10:08:53 AM

Submitted: 20-Feb-2020 10:12:44 AM

Form/Document	Document Type	Submitted	
Module Access & Routing Assignment Request	Access Request	20-Feb-2020 10:12:44 AM	PDF

- Once in the form, users can edit by unchecking the ☒ Lock Form button. The button should be re-checked once any edits are completed.
Note: Information on the functionality of the form can be found in the Quick Reference Guide for Creating and Submitting an Access & Routing Assignment Request, available on our reference website.
- On the "Review" tab of the dashboard, users can make comments and select a decision. Previous comments appear on the right side of the screen.

Add Comments:

To be shared with everyone

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Select a decision:

My Review Complete - Move Forward

Return to Requester

Comments I can see...

Posted By: CHRISTIAN BITTO

12-Mar-2020 3:07:47 PM

During my review, I have corrected the ORG for the PD request.

- To move the request forward in the review path, please click the "My Review Complete – Move Forward" button. This will alert the next step and complete your review.
- To stop the review, please click the "Return to Requester" button. This will alert the individual for whom the access is requested that the review has been cancelled and will unlock the form for them to make edits or delete the request. Any new review will begin at the first step.
- The current route status can be found on the "Route" tab of the dashboard.

For assistance, please contact PennERA Help PennERAhelp@lists.upenn.edu.