

Delegation Requests

Overview

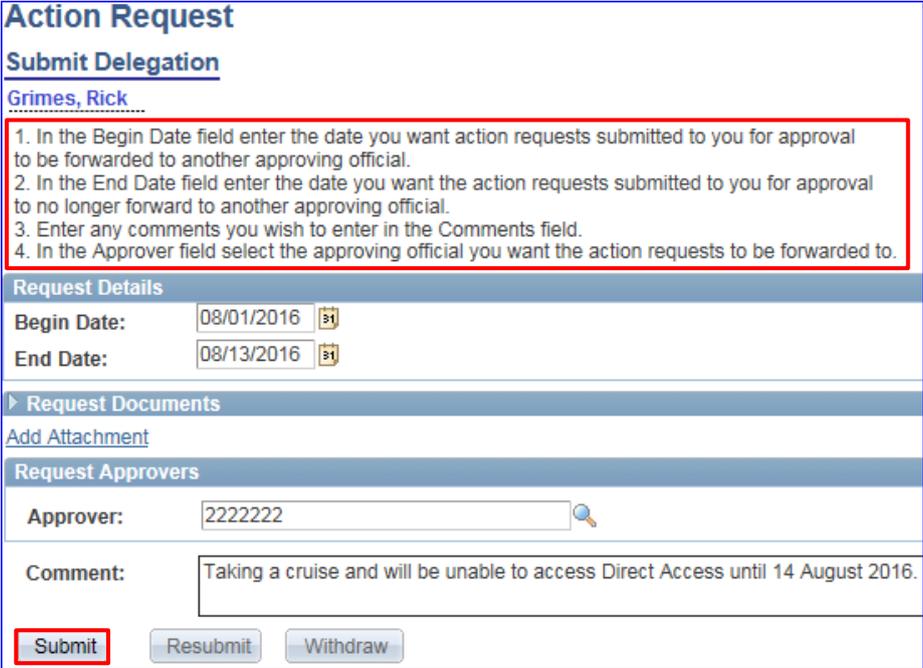
Introduction A Delegation Request in Direct Access allows an Approving Official (AO) to delegate approving authority to another Approving Official in their absence.

Contents

Topic	See Page
Submitting a Delegation Request	2
Accessing a Submitted Delegation Request	3
Changing an Approved Delegation Request	6
Delegation Request Statuses	8
Email Notifications	9

Submitting a Delegation Request

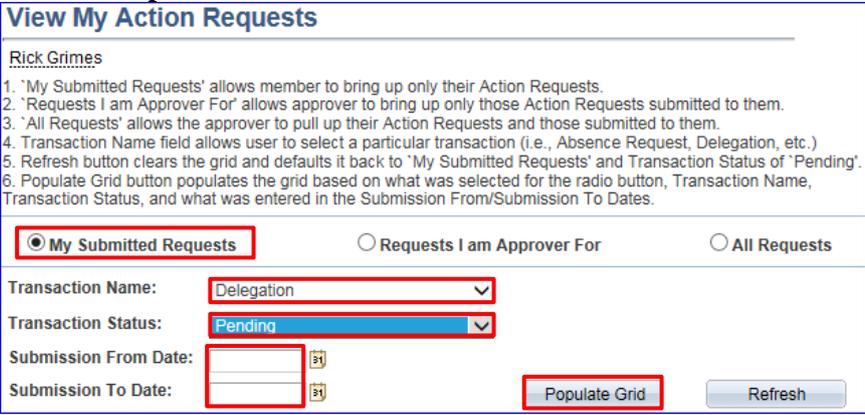
Procedure See below.

Step	Action
1	<p>From the Requests tab, select the Submit a Delegation Request link from the Self Service Requests pagelet.</p> 
2	<p>Follow the directions on the Submit Delegation page and click the Submit button.</p>  <p>The request will be in a Pending status and sent to the delegated approver for approval. An email will be sent to notify the approver of the request by the system.</p>

Accessing/Changing/Withdrawing a Submitted Delegation Request

Introduction This guide provides the procedures for accessing a submitted delegation request as well as procedures for changing or withdrawing a pending or denied request.

Procedure See below.

Step	Action
1	<p>From the Requests tab, select the View My Requests (all types) link from the Self Service Requests pagelet.</p> 
2	<p>The View My Action Requests page will display and the My Submitted Requests radio button will be selected, the Transaction Name will show All Transactions from the drop down, and the Transaction Status will show Pending from the drop down. The Submission From/To Dates may be filled in to narrow the search results. Change the Transaction Name to Delegation. Click the Populate Grid button.</p>  <p>View My Action Requests</p> <p>Rick Grimes</p> <p>1. 'My Submitted Requests' allows member to bring up only their Action Requests. 2. 'Requests I am Approver For' allows approver to bring up only those Action Requests submitted to them. 3. 'All Requests' allows the approver to pull up their Action Requests and those submitted to them. 4. Transaction Name field allows user to select a particular transaction (i.e., Absence Request, Delegation, etc.) 5. Refresh button clears the grid and defaults it back to 'My Submitted Requests' and Transaction Status of 'Pending'. 6. Populate Grid button populates the grid based on what was selected for the radio button, Transaction Name, Transaction Status, and what was entered in the Submission From/Submission To Dates.</p> <p><input checked="" type="radio"/> My Submitted Requests <input type="radio"/> Requests I am Approver For <input type="radio"/> All Requests</p> <p>Transaction Name: <input type="text" value="Delegation"/></p> <p>Transaction Status: <input type="text" value="Pending"/></p> <p>Submission From Date: <input type="text"/></p> <p>Submission To Date: <input type="text"/></p> <p><input type="button" value="Populate Grid"/> <input type="button" value="Refresh"/></p> <p>Transaction Statuses:</p> <ul style="list-style-type: none"> • Pending – Delegation Requests that have been submitted but not approved by the delegated approver. • Approved – Delegation Requests approved by the delegated approver. • Withdrawn – Delegation Requests that were withdrawn by the requesting official prior to being approved by the delegated approver. When this option is selected, the status of the request will show Terminated. • Denied – Pending or approved Delegation Requests denied by the delegated approver. • All Statuses – All of the above.

Continued on next page

Accessing/Changing/Withdrawing a Submitted Delegation Request, Continued

Procedure,
continued

Step	Action
3	<p>Click on the View Details link on the Delegation Request row you want to view. A new window will open with the submitted request page.</p>  <p>NOTE: Depending on the status of the request will determine if the requesting official can update/change or withdraw the request. If the request is in a pending or denied status, the requesting official can only change/update the request. If withdrawing the request, the status must be in the pending status.</p>
4	<p>To update/change a request at least one of the following must be changed:</p> <ul style="list-style-type: none"> • Begin Date • End Date • Comments- a reason for the change must be annotated within this block before it can be resubmitted. <p>Click the Resubmit button.</p> 

Continued on next page

Accessing/Changing/Withdrawing a Submitted Delegation Request, Continued

Procedure,
continued

Step	Action										
5	<p>To withdraw a request, click the Withdraw button.</p> <div data-bbox="352 573 1241 1211" style="border: 1px solid blue; padding: 5px;"><p>Action Request <u>Delegation</u> <u>Grimes, Rick</u></p><ol style="list-style-type: none">1. In the Begin Date field enter the date you want action requests submitted to you for approval to be forwarded to another approving official.2. In the End Date field enter the date you want the action requests submitted to you for approval to no longer forward to another approving official.3. Enter any comments you wish to enter in the Comments field.4. In the Approver field select the approving official you want the action requests to be forwarded to.<table border="1"><thead><tr><th colspan="2">Request Details</th></tr></thead><tbody><tr><td>Begin Date:</td><td>08/01/2016 </td></tr><tr><td>End Date:</td><td>08/15/2016 </td></tr></tbody></table><p>Request Documents</p><table border="1"><thead><tr><th colspan="2">Request Approvers</th></tr></thead><tbody><tr><td>Approver:</td><td>2222222 Daryl Dixon</td></tr></tbody></table><p>Comment: <input type="text" value="Cruise cancelled due to tropical storm."/></p><p><input type="button" value="Submit"/> <input type="button" value="Resubmit"/> <input style="border: 2px solid red;" type="button" value="Withdraw"/></p></div> <p>If the Delegation Request was sent to the wrong approver, then the request must be withdrawn and a new request submitted. The original approver will be notified via email that the request was withdrawn.</p>	Request Details		Begin Date:	08/01/2016 	End Date:	08/15/2016 	Request Approvers		Approver:	2222222 Daryl Dixon
Request Details											
Begin Date:	08/01/2016 										
End Date:	08/15/2016 										
Request Approvers											
Approver:	2222222 Daryl Dixon										

Changing an Approved Delegation Request

Introduction There will be time when the requesting official will need to change dates on an approved request or a delegated approver can no longer be the delegated approver. Once a Delegation Request has been approved, the only way to change it is to have the delegated approving official DENY the request so that the requesting official can make changes and resubmit.

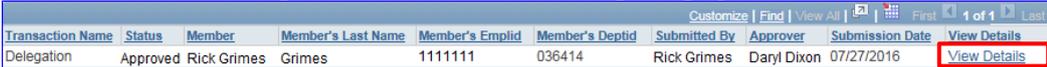
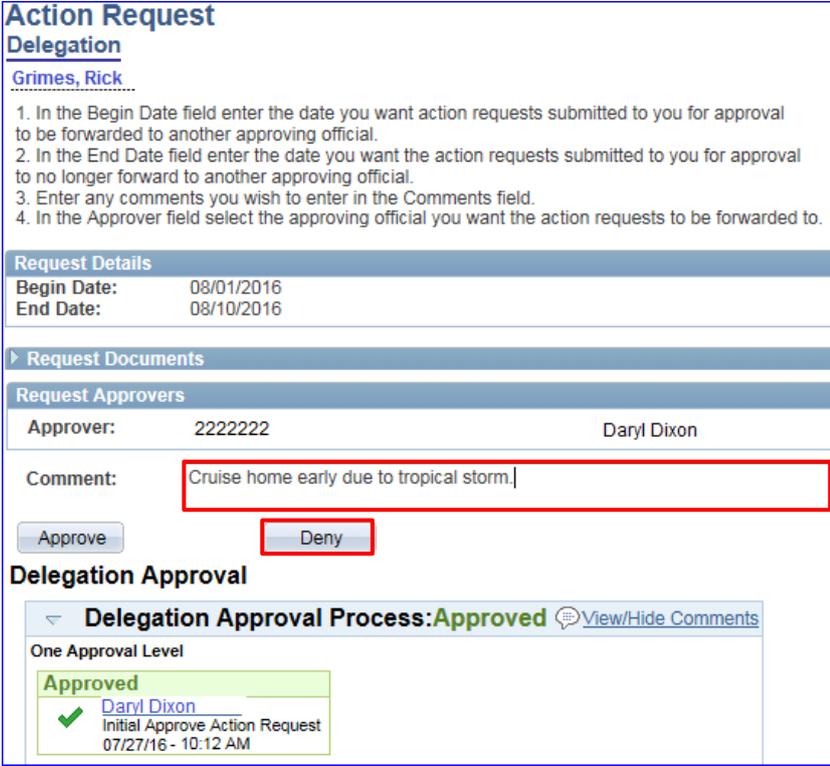
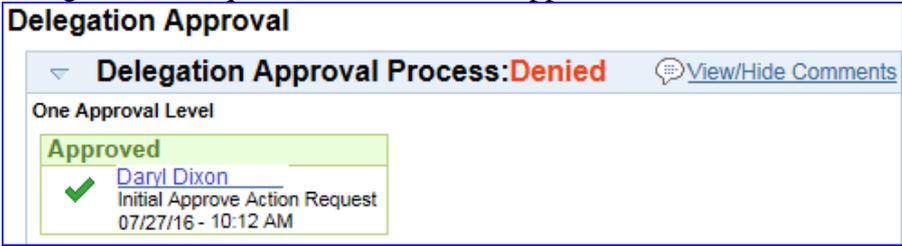
Procedure See below.

Step	Action
1	Notify the approving official via email, phone or in person that the request needs to be changed.
2	<p>The delegated approver will log into Direct Access, select the Requests tab, and click on the View My Request (all types) link in the Self Service Requests pagelet.</p> 
3	<p>Select the Requests I am Approver For radio button. Change the Transaction Name to Delegation. Change the Transaction Status to Approved. The Submission From/To Dates may be filled in to narrow the search results. Click the Populate Grid button to display results.</p> 

Continued on next page

Changing an Approved Delegation Request, Continued

Procedure,
continued

Step	Action
4	<p>Click on the View Details link on the Delegation Request row you want to view. A new window will open with the submitted request page.</p> 
5	<p>In the Comments section enter the reason for the change and click the Deny button.</p> 
6	<p>The request will now show as Denied and the delegation requester can make any changes to the request and resubmit for approval.</p> 

Delegation Request Statuses

Information Once a Delegation Request is submitted it will always be in one of the following statuses:

Status	Description	User	In this status, the user
Pending	Has been submitted by the Requester but has not yet been approved	Requester	CAN change details and then resubmit. The original request will be Terminated and a new request will be submitted with the changes.
			CAN withdraw the request and status changes to Terminated
		Delegated Approver	CAN approve the request. Status changes to Approved.
			CAN deny the request. The status changes to Denied.
Terminated	Has been withdrawn by the Requester	Requester	CAN view the details, comments and approver but CANNOT make changes to the request.
		Delegated Approver	CAN view the details, comments and approver but CANNOT make changes to the request.
Approved	Has been approved by the Delegated Approver	Requester	CAN view the details, comments and approver but CANNOT make changes to the request.
		Delegated Approver	CAN view the details, comments and approver.
			CAN deny the request (will need to provide comments before it can be saved). Status changes to Denied and Requesting official can make changes to the Denied request.
Denied	Has been denied by the Delegated Approver	Requester	CAN change details and then resubmit. The original request will be terminated and a new request will be submitted with the changes.
		Delegated Approver	CAN view the details, comments and approver but CANNOT make changes to the Request.

Email Notifications

Information Email notifications will occur for the following instances:

User	Action	Email sent to
Requester	Submits a Delegation Request to the Approver	Approver/ Delegated Approver
	Makes a change to their pending Delegation Request	
	Withdraws their pending Delegation Request	
	Makes a change to their denied Delegation Request	
Delegated Approver	Approves a pending Delegation Request	Requester/ Approver
	Denied a pending Delegation Request	
	Denies an approved Delegation Request	
