Process ID

APP_FAC_PRF_01-Requestors

Process Name

Planning Request Form – For Requestors

General Description

This documentation describes functionality relevant to the requestor (general end-user) role in the Planning Request Form application. This includes submitting and managing requests within the application.

Related Documents

APP_FAC_PRF_02-Approvers

APP_FAC_PRF_03-ProjectManagers

APP_FAC_PRF_04-Admins

Access the Planning Request Form Application

1. Navigate to apps.kennesaw.edu and login with your NetID and password. (See Figure 1)

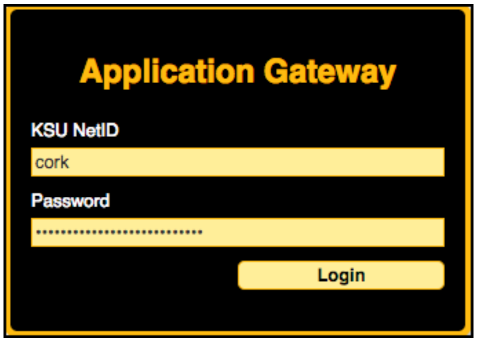

Figure 1 - Application Gateway login

2. In the top right navigation bar, click on the "All Applications" icon. (See Figure 2)

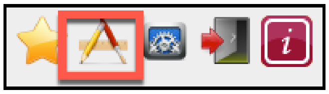

Figure 2 - All Applications icon

3. Click the **View** link next to "APP – FACL – Planning Request Form". (See Figure 3)

Figure 3 - View link

Create a New Planning Request

You can create a new request or submit a request on behalf of another employee. (See Step 3)

1. In the main menu, select the option to submit a "New Planning Request". (See Figure 4)

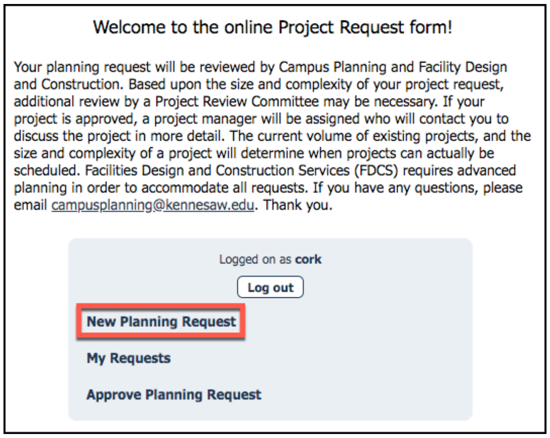

Figure 4 - Submit New Planning Request Form

2. Select the appropriate option for the new request and click **Next**. (See Figure 5)

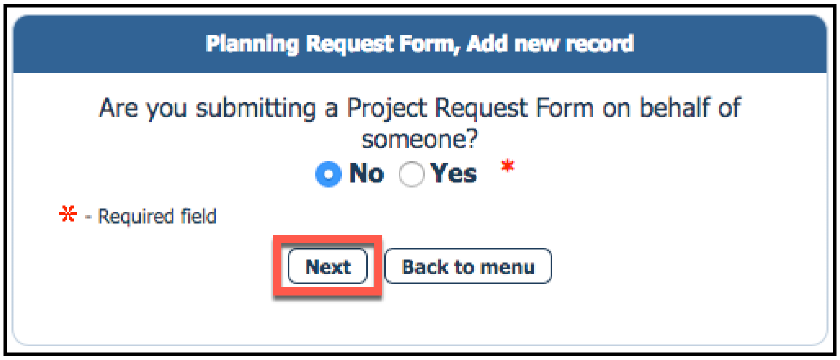

Figure 5 - Submission option

3. *Requestor Information* will auto-populate your employee information. Verify and continue to fill out the form (Note: Fields marked with a red asterisk are required).

   a. If you would like to come back to finish filling out the form for a later time, select the Action dropdown item **Save for Later** Submission and click **Save** (See Figure 7).

      i. After clicking **Save**, a message will inform you to go back to your requests to complete the submission. (See Figure 6) The status will update as "Pending User Submission".

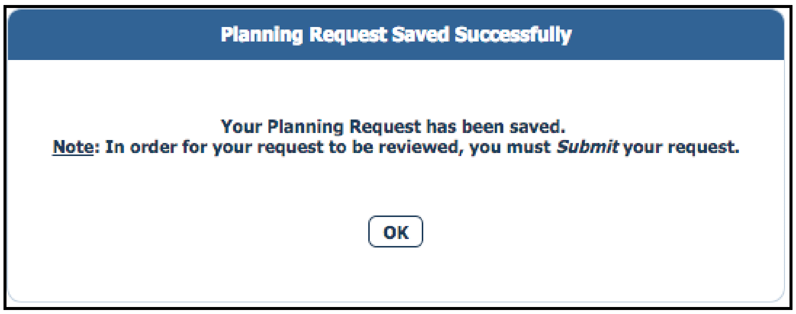

Figure 6 - Save request

      ii. Select "My Requests" to review your pending requests. (See Figure 7).

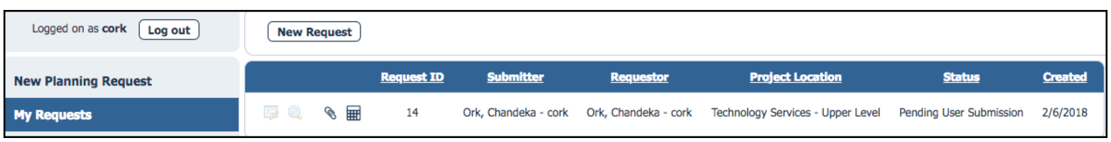

Figure 7 - My Requests

b. If you have completed the form and would like to send the request to the supervisor for approval, for the Action dropdown select **Send to Approver** and click **Save**. (See Figure 8)

   Note: If your project will eliminate any instructional space, the Vice President for Academic Affairs must approve the request before your department approves

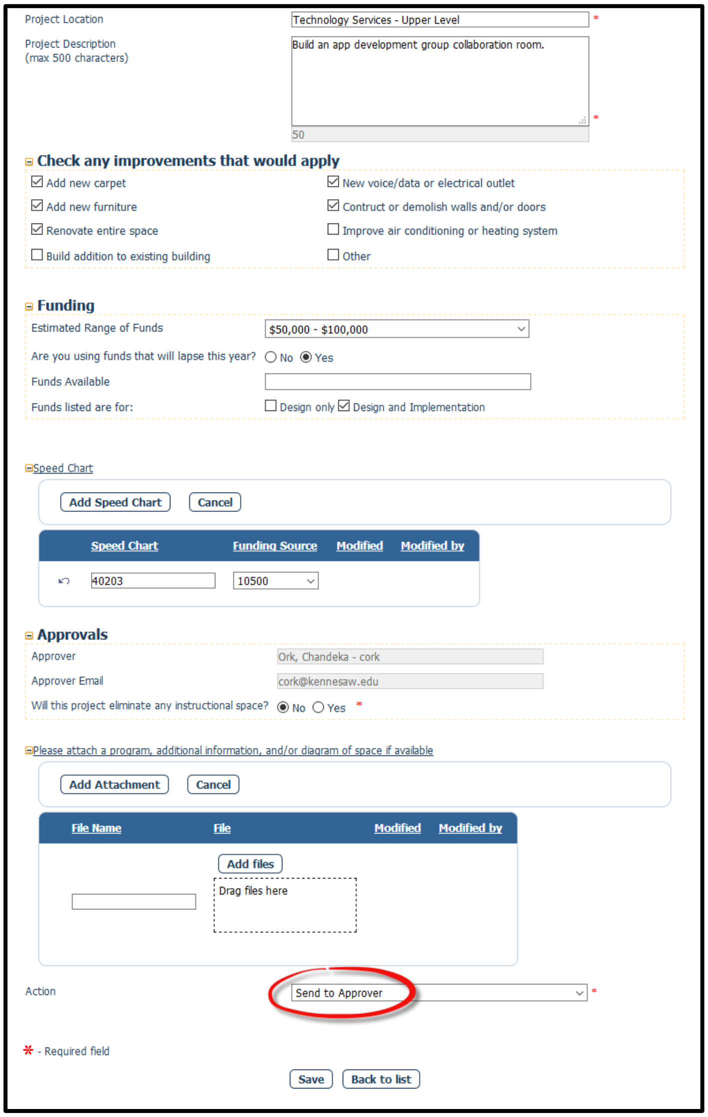

Figure 8 - Planning Request Form

4. Once complete, you will get a message stating a successful submission that will send an automated email for your planning request. (See Figure 9)

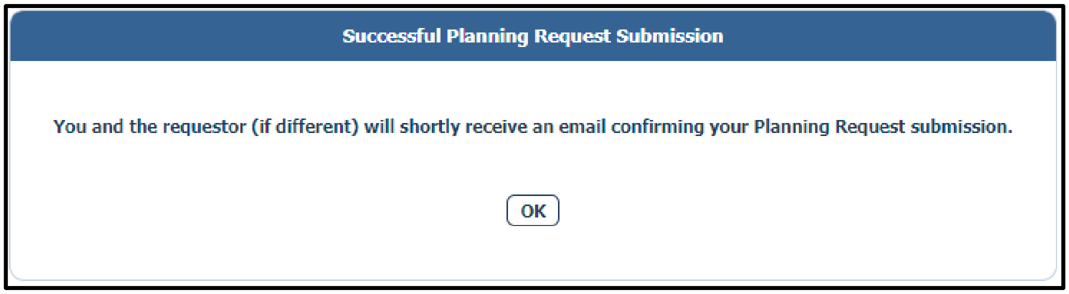

Figure 9 - Submission complete

5. Check your email to ensure you received an email for the request. (See Figure 10) The supervisor will also receive an email to approve your request. The status will update as "Pending Department Approval".

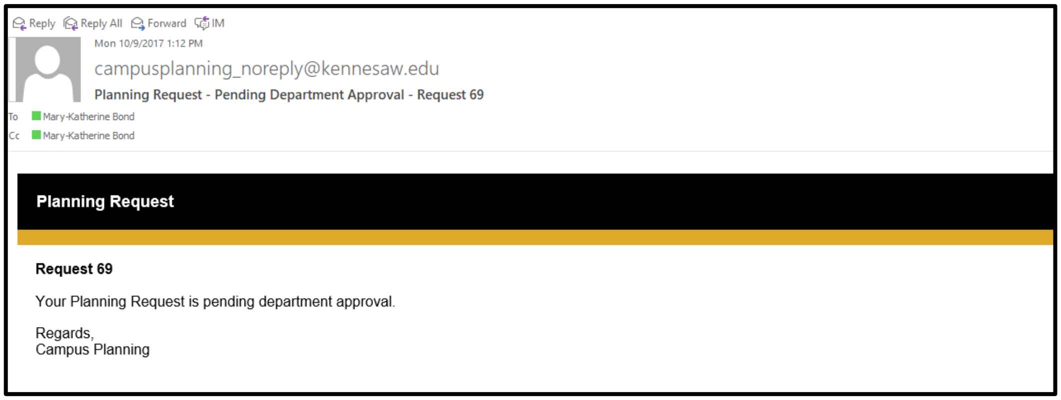

Figure 10 - Email confirmation

Manage My Requests

Each request submitted will display varying statuses to determine which stage the request may be in. Statuses that require action from the user are:

- ***Pending User Submission*** – a submission has been saved, but not submitted
- ***Need More Information*** – a submission requires additional information from the Campus Planning administrators, and you will need to go through the approval process again

1. After logging back into the system, click on "My Requests" to review all submitted requests from the main menu. (See Figure 11)

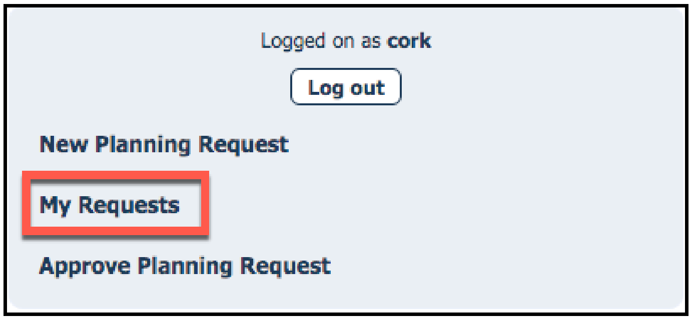

Figure 11 - My Requests

2. Click the 'edit' icon in the list page of requests next to the submission that requires additional action.

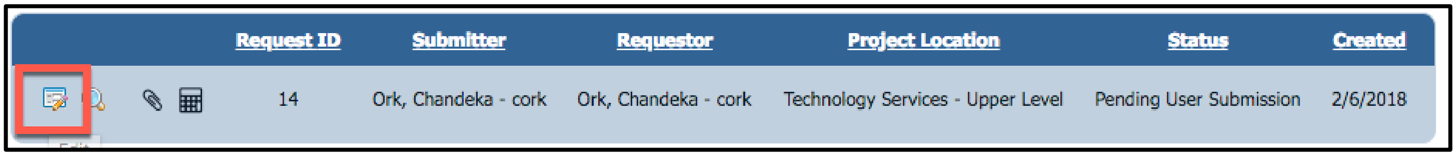

Figure 12 - Edit request

3. Review the request, make any edits necessary and change the Action dropdown to **Send to Approver** and click **Save**. This will notify your supervisor for approval and update the status to "Pending Department Approval". (See Figure 13)

Figure 13 - Submit request for approval