



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)

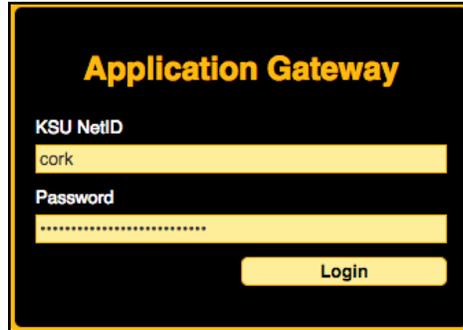


Figure 1 - Application Gateway login

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

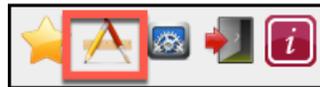


Figure 2 - All Applications icon

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)

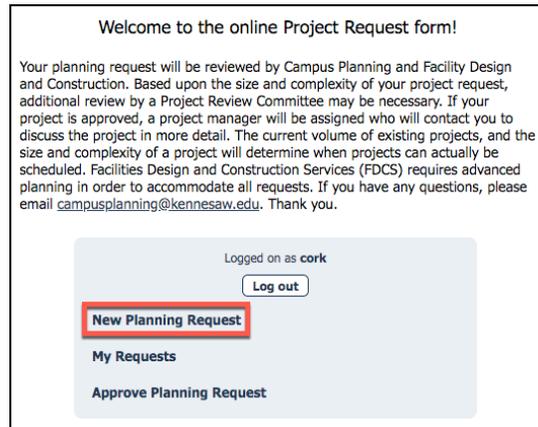


Figure 4 - Submit New Planning Request Form

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

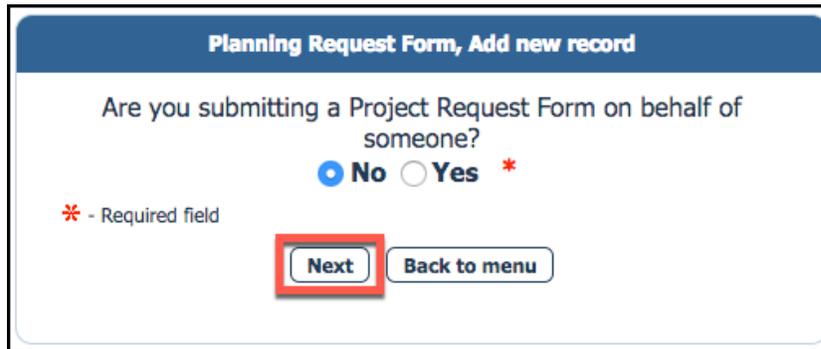
A screenshot of a web form titled "Planning Request Form, Add new record". The main question is "Are you submitting a Project Request Form on behalf of someone?". There are two radio button options: "No" (selected) and "Yes". A red asterisk is next to the "Yes" option. Below the question is a legend: "* - Required field". At the bottom, there are two buttons: "Next" (highlighted with a red box) and "Back to menu".

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”.

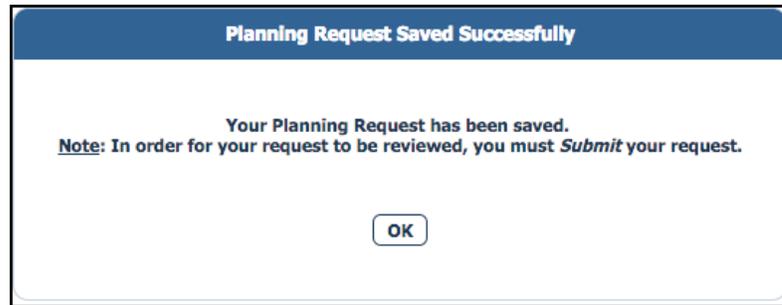


Figure 6 - Save request

- ii. Select “My Requests” to review your pending requests. (See Figure 7).

| Logged on as cork Log out | New Request | | | | |
|---|-----------------------------|----------------------|-----------------------------------|-------------------------|----------|
| New Planning Request | | | | | |
| My Requests | | | | | |
| Request ID | Submitter | Requestor | Project Location | Status | Created |
| 14 | Ork, Chandeka - cork | Ork, Chandeka - cork | Technology Services - Upper Level | Pending User Submission | 2/6/2018 |

Figure 7 - My Requests

Planning Request Form – For Requestors

- 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

The screenshot displays the Planning Request Form with the following details:

- Project Location:** Technology Services - Upper Level
- Project Description (max 500 characters):** Build an app development group collaboration room.
- Check any improvements that would apply:**
 - Add new carpet
 - Add new furniture
 - Renovate entire space
 - Build addition to existing building
 - New voice/data or electrical outlet
 - Construct or demolish walls and/or doors
 - Improve air conditioning or heating system
 - Other
- Funding:**
 - Estimated Range of Funds: \$50,000 - \$100,000
 - Are you using funds that will lapse this year? No Yes
 - Funds Available: [Empty field]
 - Funds listed are for: Design only Design and Implementation
- Speed Chart:** Add Speed Chart button, Cancel button, and a table with columns: Speed Chart, Funding Source, Modified, Modified by. Row 1: 40203, 10500.
- Approvals:** Approver: Ork, Chandela - cork; Approver Email: cork@kennesaw.edu; Will this project eliminate any instructional space? No Yes
- Attachments:** Add Attachment button, Cancel button, and a table with columns: File Name, File, Modified, Modified by. Includes an "Add files" button and a "Drag files here" area.
- Action:** Send to Approver (highlighted with a red circle)
- Legend:** * - Required field
- Buttons:** Save, Back to list

Figure 8 - Planning Request Form

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

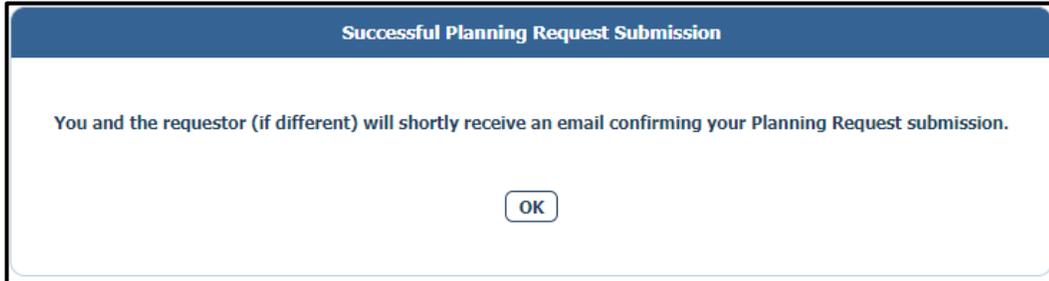


Figure 9 - Submission complete

- 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".

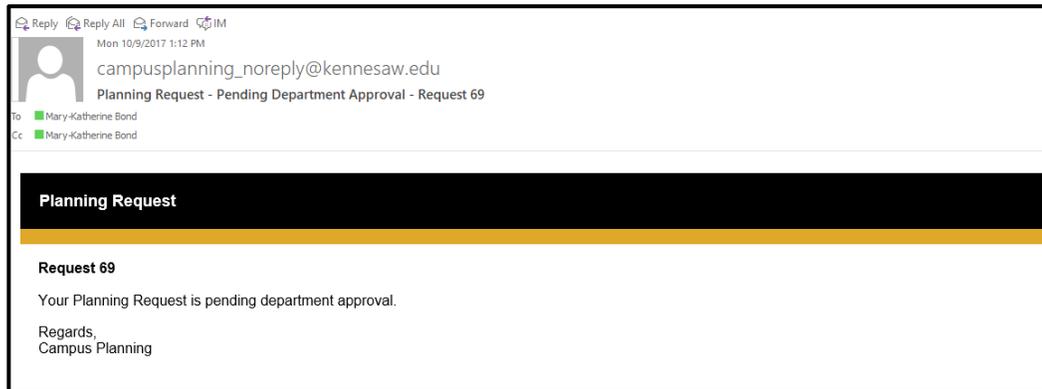


Figure 10 - Email confirmation

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)

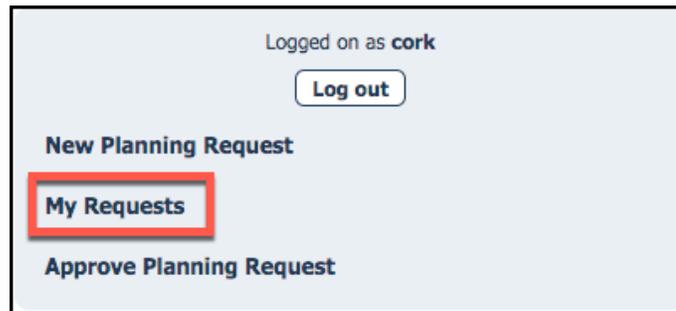


Figure 11 - My Requests

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

| | Request ID | Submitter | Requestor | Project Location | Status | Created |
|---|------------|----------------------|----------------------|-----------------------------------|-------------------------|----------|
|  | 14 | Ork, Chandeka - cork | Ork, Chandeka - cork | Technology Services - Upper Level | Pending User Submission | 2/6/2018 |

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)



The screenshot shows a form section with the label "Action" on the left. To its right is a dropdown menu with the text "Send to Approver" and a small downward arrow on the right side. A red arrow points from the left towards the dropdown menu. Below the dropdown menu, there is a red asterisk followed by the text "- Required field". At the bottom of the form section, there are two buttons: "Save" and "Back to list". The "Save" button is highlighted with a mouse cursor.

Figure 13 - Submit request for approval