Creating Requests

1. To begin creating a new request, select the type of request in the Start a New Request section on the home page and click Start.
2. Scroll through the form and enter information as needed into the appropriate fields.
3. Click Create Request.
4. Add pertinent information and click Save.

Deleting Requests

Requests can only be deleted by the request creator before the request has been assigned.

To delete a newly created request, select Delete from the More Actions drop-down menu.

Once the request is deleted, no further changes are allowed.

My Requests Inbox

The My Requests Inbox displays details of any request forms awaiting some action on the part of the user (e.g., which were created and not yet assigned or which have been assigned to the user or to a group to which the user belongs).
• By default, requests will be sorted by the date assigned
• To sort by a different value, click any of the column header links
• The arrow symbol appears next to the selected column header indicating how results are being sorted (e.g., ascending or descending order)
• To filter requests, type a keyword into any of the text boxes below the column headers or select a value from one of the available drop-down menus
• To hide the filter options, click **Hide Filters**
• To reset filters to the original values, click **Clear Filters**

![Request Form]

- By default, the first 20 requests will be listed. To view more requests on a single page, choose a larger value from the **Requests per page** drop-down menu
- If there are multiple pages of requests, click **Previous** or **Next** to page through the results

**My Requests**

The **My Requests** page displays details of any request forms created by the user or which were create on the user’s behalf.

- By default, requests will be sorted by status
- To sort by a different value, click any of the column header links
- Arrow symbol appears next to the selected column header indicating how results are being sorted (e.g., ascending or descending order)
- To filter requests, type a keyword into any of the text boxes below the column headers or select a value from one of the available drop-down menus
- To hide the filter options, click **Hide Filters**
- To reset filters to the original values, click **Clear Filters**
By default, the first 20 requests will be listed. To view more requests on a single page, choose a larger value from the Requests per page drop-down menu.

If there are multiple pages of requests, click Previous or Next to page through the results.

Requests Search

Not all users will see the Search link in the Navigation Menu nor will all users be authorized to access the Search page.

Authorizations
Access to the request form search page is limited to university employees who are assigned to a desk that is linked to an authorization view with command authorization view status for the command or electronic document in question.

To search for request forms:

1. Select a specific request type from the Search drop-down menu
2. Select a search criteria from the by drop-down menu
3. Type a search value in the for field
4. Click Search

- By default, search results will be sorted by Request ID
- To sort by a different value, click any of the column header links
- Arrow symbol 🔄 appears next to the selected column header indicating how results are being sorted (e.g., ascending or descending order)
- To filter requests, type a keyword into any of the text boxes below the column headers or select a value from one of the available drop-down menus
To hide the filter options, click **Hide Filters**
To reset filters to the original values, click **Clear Filters**
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**My Requests Profiles**

The **My Requests Profiles** page allows users to pre-select people or groups to which forms will be assigned in the future. Once saved, profiled assignees can make assigning forms simpler and easier.

**To profile an assignee:**

1. Select a specific request type from the drop-down menu
2. Check **UT EID** or **Group**
3. Type in or search for the UT EID of the assignee or type in or search for the group name
4. Click **Add to Profile**

To make the UT EID or group the default assignee, check **Make Default** before clicking **Add to Profile**. Making an individual or group the default means that forms will automatically be assigned to the person or group selected.

Once a default assignee or group is chosen, to select a different assignee or group, click **Make Default** on the **Default Profile** column. If the update was successful, the page will automatically refresh showing the updated information.
To remove an assignee or group from the default list, click the X in the Delete column. If the update was successful, the page will automatically refresh showing the updated information.

**Assign**

Once a request form is created it can be assigned to one or more people or groups depending on the department’s ad hoc assignment process.

Whenever additional information or further action is required on a request, it should be assigned according to departmental assignment rules.

Assigning a request to a person or group is not the same as approving an electronic document and routing it forward as in *DEFINE or on UT Direct.

**A request can be assigned in one of two ways:**

1. Click **Save and Assign** at the top of the request form
2. Click the **Assign** tab at the top of the request form page
Either of the two above methods will take the user to the Travel Authorization Request: Assign page. Once there, if a default assignee has been selected, the name and UT EID or group name of the assignee will automatically be displayed in the Assign to field.

1. To select a different assignee, select **Enter UT EID** or **Enter Group**
2. Type in or search for the UT EID of the assignee or type in or search for the group name
3. To add the assignee to the user’s profile, check **Add to Profile**
4. Any **Assignment Notes** entered will appear in the notification email sent to the assignee
5. Click **Assign**
If the request has been assigned to a group, clicking the **Assign to Me** button will allow an individual administrator to take further action on the request such as updating, declining, or finalizing the request.

**Note**: At this time, there is no **recall** action for requests as in *DEFINE or UT Direct. If a user wishes to make changes to a request he or she has already assigned to another person or group, the user will have to contact the assignee to request that it be assigned back to the user. However, departmental administrators, those with command authorization update or higher, do have the ability to assign forms to themselves.

### Decline

If someone to whom a request is assigned wishes to refuse the request for some reason, the request can be declined.

Declining the request means that no further changes can be made to the form.

**If the request form simply requires additional information, it should not be declined; instead, it should be reassigned.**
A request can be declined in one of two ways:

1. Select **Save and Decline** from the drop-down menu of options on the request page
2. Click the **Decline** tab at the top of the request form page
3. The user will be required to enter a **Reason for Declining**
4. Click **Decline**

Once the request is declined, an email notification is sent to the person who created the request to let him/her know that the form was declined.

**Once the request is declined, no further changes can be made.**
Once all the necessary information has been added to the request form and it has followed the departmental ad hoc approval process, the next step is to finalize it. Finalizing the request will either generate the associated electronic document (such as a *DEFINE VE5 for Travel Authorization Requests) or send an email notification to a particular department (such as facilities Services) that additional steps are now required.
A request can be finalized in one of two ways:

1. Select **Save and Finalize** from the drop-down menu of options on the request page
2. Click the **Finalize** tab at the top of the request form page
3. The user may be required to enter additional information on the finalize page (this will vary depending on the type of request)
4. Click **Finalize**

For those requests that generate electronic documents, the finalize page is the only time when the user will be asked to select a Creator Desk.

**Once the request is finalized, no further changes can be made.**

**History**

The **History** tab displays the history of actions taken on a particular request form. Information on this page includes: what action was taken, by whom, and the date and time the action was taken.
In addition to the updatable request form, there is an additional version of the request which is available to users who might not be directly connected with it but which still allows employees the ability to view information without making updates.

The View Only page will display to a user if the request was created on the user’s behalf.