

# Direct Access User Roles and Functions

## Overview

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**Introduction** This guide provides the procedures for **requesting, removing, and withdrawing** User Roles and Functions in Direct Access (DA).

For procedures to **recertify** Roles, see the Recertifying DA User Roles and Functions user guide.

**Allow 24 hours after PPC approval to see any requested changes to Roles.**

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**Direct Access Functional User Roles** DA Functional User Roles are position based. It is important to **review the requirements** of each User Role and Function to ensure all criteria is met, such as appropriate Approval Authority and/or a Designation Letter uploaded with the request. For a list of DA Functional User Roles and the requirements associated with each role, refer to PPC’s website at: <https://www.dcms.uscg.mil/ppc/da/functionalroles/>.

The below User Roles require a **Designation Letter** that must be uploaded within the User Role request:

- CG Educational Services Officer
  - CG Passport Acceptance Agent
  - CG Recruiter in Charge (see “Recruiter in Charge” on next page)
  - CG Training Officer
  - CG Urinalysis Coordinator
- 

**Pending Requests** It is important to follow up with the Approver. If the User Access Request is not approved within 30 days, **DA will automatically terminate the request and email the submitter to submit a new request.**

Once the Approver approves the request, it will be sent to PPC for final approval.

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**Termination of Roles** If a Command requires termination of User Roles prior to transfer or separation, notify PPC Customer Care. Include the member’s Employee ID number and the User Role(s) and Function(s) to be revoked.

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### Contents

Topic	See Page
<a href="#">Requesting New User Roles</a>	3
<a href="#">Removing User Roles</a>	9
<a href="#">Withdrawing a User Roles Request</a>	13

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*Continued on next page*

## Overview, Continued

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**Recruiter In Charge** For those requesting the **CG Recruiter In Charge** role and the member's position data in Direct Access does **NOT** indicate Recruiter In Charge, a Designation Memo is required and **MUST** be submitted to PPC Customer Care prior to submitting a User Roles Request (see the [Understanding Job Data](#) user guide for reviewing a member's position data in DA).

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**Mobilization Roles** **CG Mobilization Administration:** Provides access to Mobilization setup tables, components, reports, and the ability to approve and cancel Mobilization requirements. This role is intended only for DOL, AREA, PSC, and District personnel in charge of surge staffing and is approved on a case by case basis. This role **requires** the User Roles Request to be sent separately to PSC, with justification listed.

**CG Mobilization Approver:** Provides access to Mobilization components, reports, and the ability to approve and cancel Mobilization requirements.

**CG Mobilization Processor:** Provides access to Mobilization components, reports, and the ability to approve Mobilization requirements.

**CG Mobilization Resume Endorser:** Provides access to endorse Mobilization resumes.

**CG Mobilization View Only:** Provides view only access to the Mobilization components.

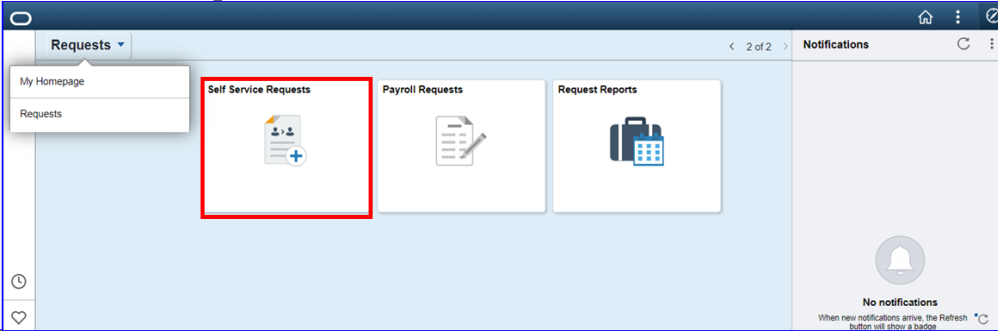
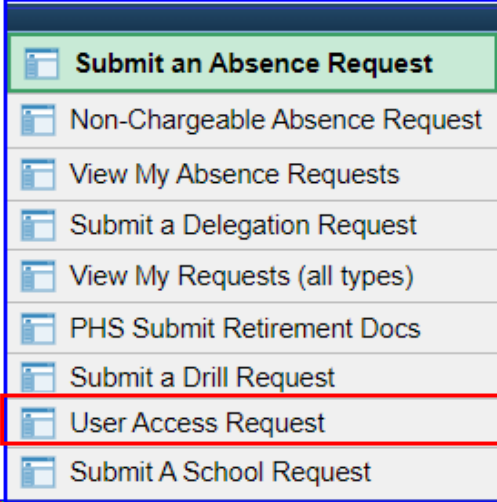
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# Requesting New User Roles

**Introduction** This section provides the procedures for requesting new User Roles and Functions in Direct Access (DA).

**Allow 24 hours after PPC approval to see any requested changes to Roles.**

**Procedures** See below.

Step	Action
<p><b>1</b></p>	<p>After selecting <b>Requests</b> from the My Homepage drop-down, click on the <b>Self Service Requests</b> tile.</p>  <p>The screenshot shows a web interface with a 'Requests' dropdown menu open. The menu options are 'My Homepage' and 'Requests'. The 'Requests' option is selected, and a sub-menu is displayed with three tiles: 'Self Service Requests' (highlighted with a red border), 'Payroll Requests', and 'Request Reports'. The 'Self Service Requests' tile features an icon of two people and a plus sign.</p>
<p><b>1.5</b></p>	<p>Select the <b>User Access Request</b> option.</p>  <p>The screenshot shows a list of request options. The options are: 'Submit an Absence Request', 'Non-Chargeable Absence Request', 'View My Absence Requests', 'Submit a Delegation Request', 'View My Requests (all types)', 'PHS Submit Retirement Docs', 'Submit a Drill Request', 'User Access Request' (highlighted with a red border), and 'Submit A School Request'. Each option is preceded by a folder icon.</p>

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# Requesting New User Roles, Continued

Procedures,  
continued

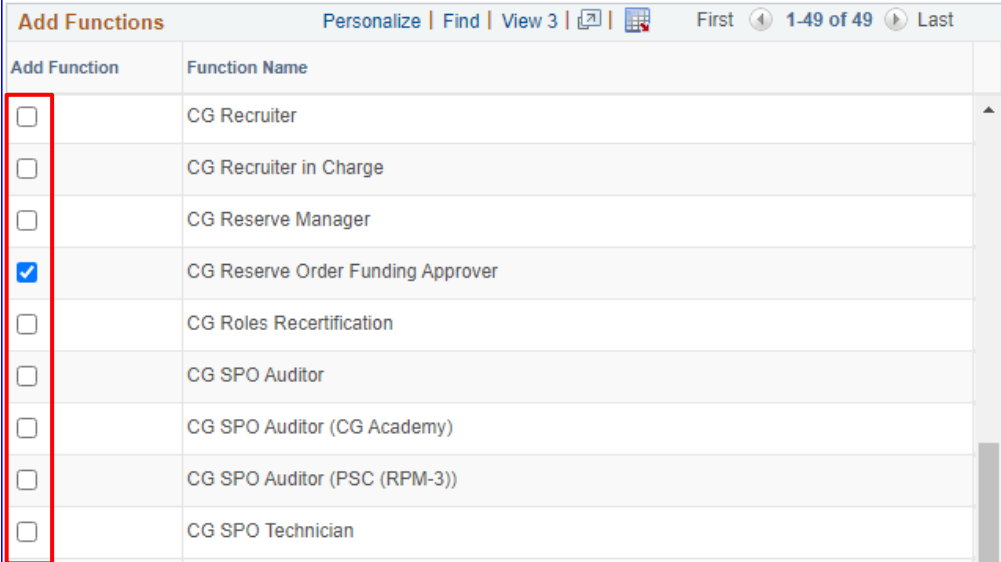
Step	Action																								
2	<p>The User Access Request page will display. Click <b>Initiate Request</b>.</p> <div data-bbox="359 443 1369 824" style="border: 1px solid blue; padding: 5px;"> <p><b>User Access Request</b></p> <p>This page is used to request user access to the Direct Access system. This page can be used to add additional roles or delete existing roles. The request must be approved by appropriate authority.</p> <p>User ID: 1234567 Kaywinnett L. Frye</p> <p style="text-align: center;"><b>Initiate Request</b></p> <p>Many of these roles either require special routing or additional documents in order for the role to be granted. Review the Personnel and Pay Procedures Manual, PPCINST M1000.2 (series), Chapter 2, for additional guidance.</p> </div>																								
3	<p>Any <b>Current Roles</b> and <b>Current Functions</b> for the member will display. Click <b>View All</b> (if necessary) to view the entire list of Current Roles and Current Functions.</p> <p><b>NOTE:</b> When members PCS, their User Roles are reset to Self Service only.</p> <div data-bbox="359 1048 1369 1563" style="border: 1px solid blue; padding: 5px;"> <p><b>User Access Request</b></p> <p><b>Request Details</b></p> <p>User Access Request For: 1234567 Kaywinnett L. Frye</p> <p>Request ID: Request Status:</p> <p><b>Current Roles</b> Personalize   Find <b>View All</b> First 1-3 of 3 Last</p> <table border="1" data-bbox="359 1243 1369 1444"> <thead> <tr> <th>Keep Role</th> <th>Remove Role</th> <th>Role Name</th> <th>Role Description</th> <th>Role Details</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGSSCIV</td> <td>CG Self Service Civilian</td> <td><a href="#">Role Details</a></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CG_SECURITY_ADMIN</td> <td>CG_SECURITY_ADMIN</td> <td><a href="#">Role Details</a></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CG_SS_MBR_RET2</td> <td>RET2 Member Self Service</td> <td><a href="#">Role Details</a></td> </tr> </tbody> </table> <p><b>Current Functions</b> Personalize   Find <b>View All</b> First 1 of 1 Last</p> <table border="1" data-bbox="359 1489 1369 1563"> <thead> <tr> <th>Function Name</th> <th>Function Description</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> </tr> </tbody> </table> </div>	Keep Role	Remove Role	Role Name	Role Description	Role Details	<input type="checkbox"/>	<input type="checkbox"/>	CGSSCIV	CG Self Service Civilian	<a href="#">Role Details</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CG_SECURITY_ADMIN	CG_SECURITY_ADMIN	<a href="#">Role Details</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CG_SS_MBR_RET2	RET2 Member Self Service	<a href="#">Role Details</a>	Function Name	Function Description		
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4	<p>Under the <b>Add Functions</b> section, click <b>View All</b>.</p> <div data-bbox="359 1630 1369 1839" style="border: 1px solid blue; padding: 5px;"> <p><b>Add Functions</b> Personalize   Find <b>View All</b> First 1-3 of 40 Last</p> <table border="1" data-bbox="359 1668 1369 1839"> <thead> <tr> <th>Add Function</th> <th>Function Name</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>CG Admin Supervisor</td> </tr> <tr> <td><input type="checkbox"/></td> <td>CG Admin Technician</td> </tr> <tr> <td><input type="checkbox"/></td> <td>CG Assignment Officer (EPM)</td> </tr> </tbody> </table> </div>	Add Function	Function Name	<input type="checkbox"/>	CG Admin Supervisor	<input type="checkbox"/>	CG Admin Technician	<input type="checkbox"/>	CG Assignment Officer (EPM)																
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# Requesting New User Roles, Continued

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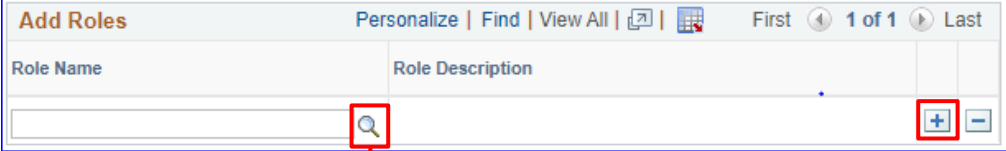
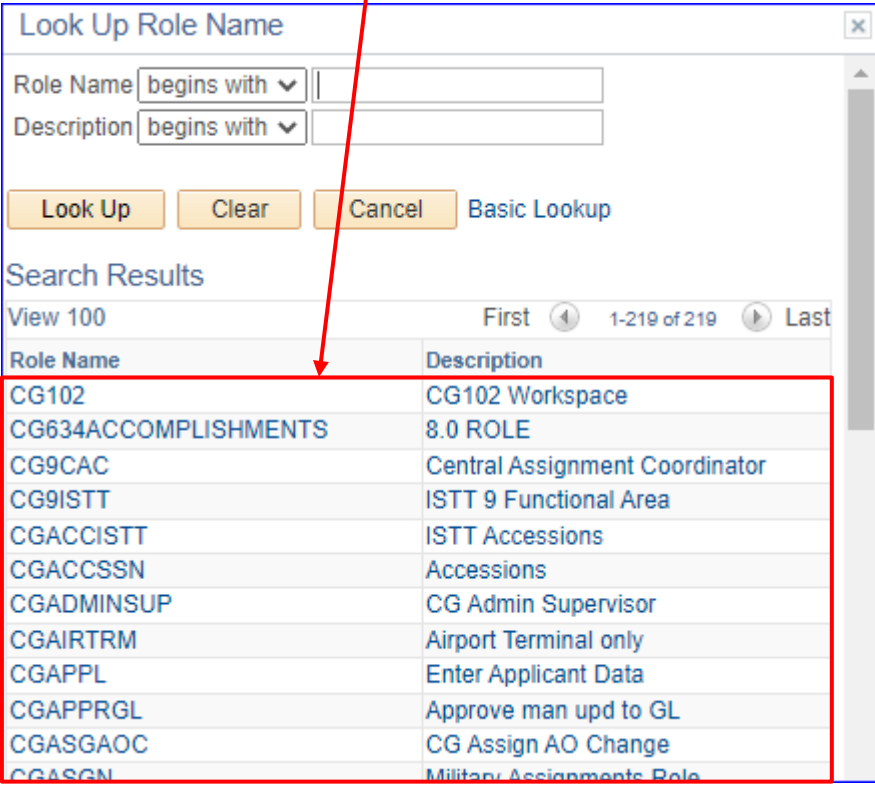

Procedures,  
continued

Step	Action																				
5	<p>Scroll through and <b>select</b> the Functions the position requires.</p> <p><b>NOTE:</b> It is important to <b>review the requirements</b> of each User Role and Function to ensure all criteria are met, such as appropriate Approval Authority and/or a Designation Memo provided to PPC. See the <a href="#">DA Functional Roles</a> webpage for a list of requirements.</p>  <table border="1" data-bbox="357 658 1361 1218"> <thead> <tr> <th data-bbox="360 712 536 739">Add Function</th> <th data-bbox="536 712 1358 739">Function Name</th> </tr> </thead> <tbody> <tr> <td data-bbox="360 757 536 792"><input type="checkbox"/></td> <td data-bbox="536 757 1358 792">CG Recruiter</td> </tr> <tr> <td data-bbox="360 810 536 846"><input type="checkbox"/></td> <td data-bbox="536 810 1358 846">CG Recruiter in Charge</td> </tr> <tr> <td data-bbox="360 864 536 900"><input type="checkbox"/></td> <td data-bbox="536 864 1358 900">CG Reserve Manager</td> </tr> <tr> <td data-bbox="360 918 536 954"><input checked="" type="checkbox"/></td> <td data-bbox="536 918 1358 954">CG Reserve Order Funding Approver</td> </tr> <tr> <td data-bbox="360 972 536 1008"><input type="checkbox"/></td> <td data-bbox="536 972 1358 1008">CG Roles Recertification</td> </tr> <tr> <td data-bbox="360 1025 536 1061"><input type="checkbox"/></td> <td data-bbox="536 1025 1358 1061">CG SPO Auditor</td> </tr> <tr> <td data-bbox="360 1079 536 1115"><input type="checkbox"/></td> <td data-bbox="536 1079 1358 1115">CG SPO Auditor (CG Academy)</td> </tr> <tr> <td data-bbox="360 1133 536 1169"><input type="checkbox"/></td> <td data-bbox="536 1133 1358 1169">CG SPO Auditor (PSC (RPM-3))</td> </tr> <tr> <td data-bbox="360 1187 536 1223"><input type="checkbox"/></td> <td data-bbox="536 1187 1358 1223">CG SPO Technician</td> </tr> </tbody> </table>	Add Function	Function Name	<input type="checkbox"/>	CG Recruiter	<input type="checkbox"/>	CG Recruiter in Charge	<input type="checkbox"/>	CG Reserve Manager	<input checked="" type="checkbox"/>	CG Reserve Order Funding Approver	<input type="checkbox"/>	CG Roles Recertification	<input type="checkbox"/>	CG SPO Auditor	<input type="checkbox"/>	CG SPO Auditor (CG Academy)	<input type="checkbox"/>	CG SPO Auditor (PSC (RPM-3))	<input type="checkbox"/>	CG SPO Technician
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# Requesting New User Roles, Continued

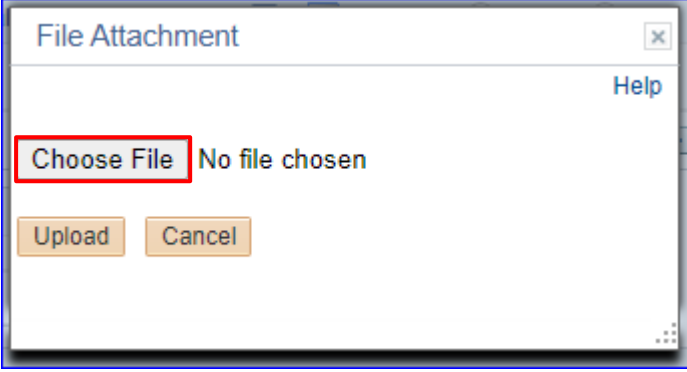
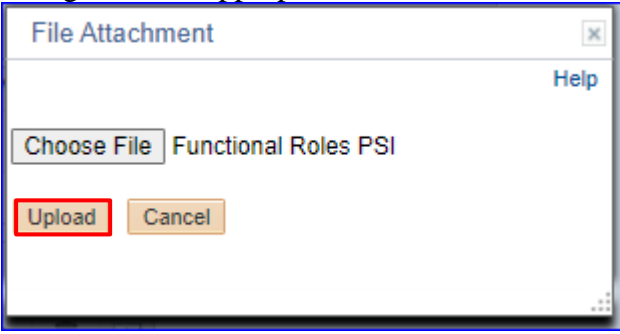

Procedures,  
continued

Step	Action
6	<p>If a specific User Role or Function is not listed: under <b>Add Roles</b>, use the <b>Lookup</b> to locate the <b>Role Name</b>, then select the appropriate role.</p> <p>Click the (+) button to add additional Roles as appropriate.</p>  
7	<p>If a role requires a Designation Letter, you must add it to the request, otherwise you will get an error. Click the <b>Add Attachment</b> icon.</p> 

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# Requesting New User Roles, Continued

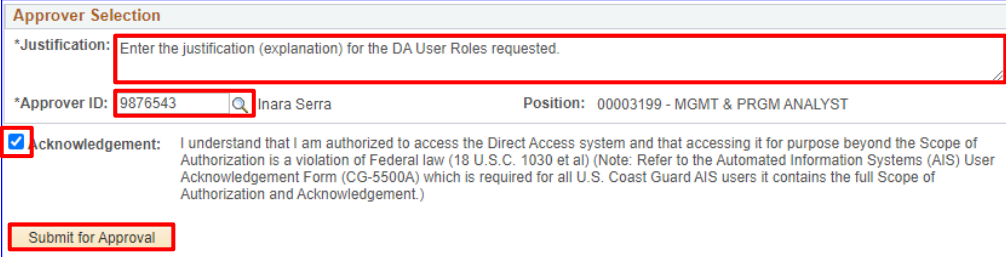
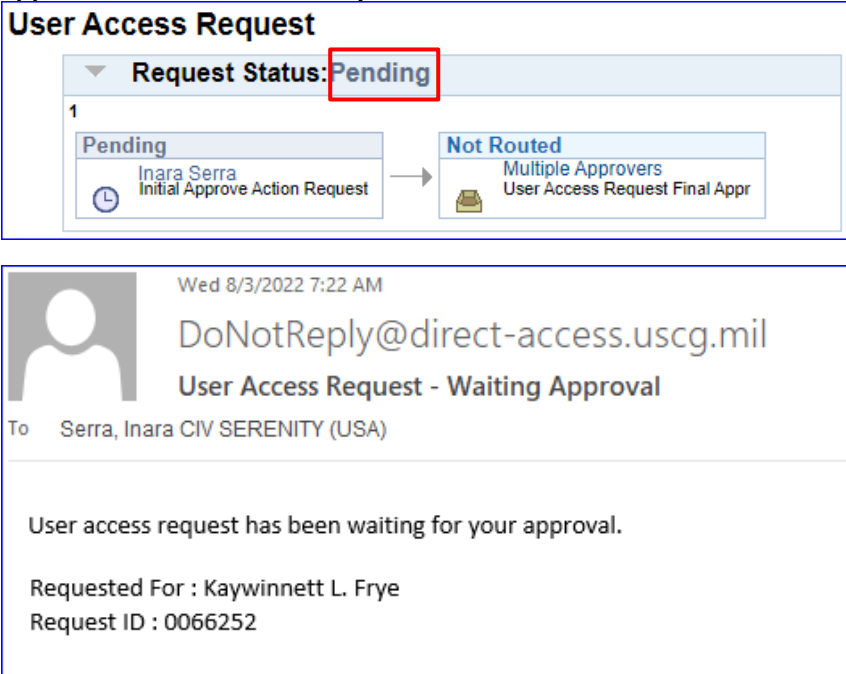
Procedures,  
continued

Step	Action																					
<p><b>8</b></p>	<p>Click <b>Choose File</b>.</p> <p><b>NOTE:</b> The document cannot be in Excel and it cannot exceed 400 KB.</p> 																					
<p><b>9</b></p>	<p>Navigate to the appropriate document/file and select it. Click <b>Upload</b>.</p> 																					
<p><b>10</b></p>	<p>The uploaded <b>File Name</b> will display. If more Designation Letters are required, click the <b>Plus</b> button and repeat Steps 7-9, otherwise continue to Step 11.</p>  <table border="1" data-bbox="357 1435 1366 1552"> <thead> <tr> <th colspan="2">Designation Letters (400 KB Limit)</th> <th>Personalize</th> <th>Find</th> <th>First</th> <th>1 of 1</th> <th>Last</th> </tr> <tr> <th>File Name</th> <th>Uploaded By</th> <th>Uploaded On</th> <th></th> <th></th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Functional Roles PSI.docx</td> <td>1234567</td> <td>03/02/2023 9:43AM</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Designation Letters (400 KB Limit)		Personalize	Find	First	1 of 1	Last	File Name	Uploaded By	Uploaded On					Functional Roles PSI.docx	1234567	03/02/2023 9:43AM				
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# Requesting New User Roles, Continued

Procedures,  
continued

Step	Action
<p><b>11</b></p>	<p>In the Approver Section, enter the <b>Justification</b> for requesting the User Role(s)/Function(s) (required). Enter the <b>Approver ID</b> (approver’s Employee ID number) or use the Lookup to locate the approver’s Employee ID number.</p> <p>Review the statement and check the <b>Acknowledgement</b> box. Click <b>Submit for Approval</b>.</p> 
<p><b>12</b></p>	<p>Once submitted, the request will be placed in a Pending status and email notification will be sent to the Approver. It is important to follow up with the Approver. If the User Roles request is <b>not approved within 30 days of submission, DA will automatically terminate the request</b> and email the submitter to submit a new request.</p> <p><b>NOTE:</b> Once the Approver approves the request, it will be sent to PPC for final approval. The submitter will receive email notification upon final approval or denial of the request.</p> 



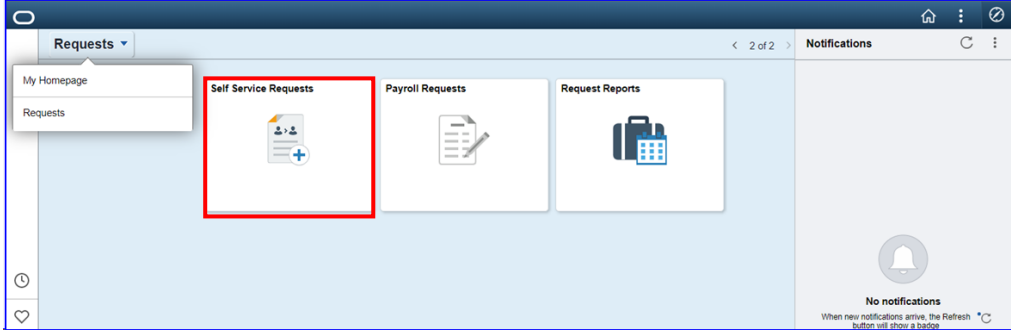
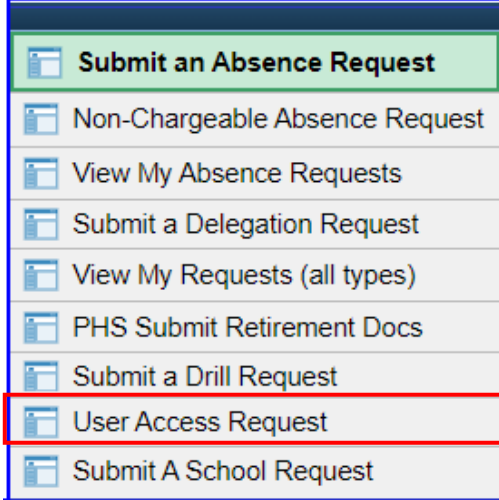
# Removing User Roles

**Introduction** This section provides the procedures for removing User Roles and Functions in Direct Access (DA).

**Allow 24 hours after PPC approval to see any requested changes to Roles.**

**Termination of Roles** If a Command requires termination of User Roles prior to transfer or separation, notify PPC Customer Care. Include the member’s Employee ID number and the User Role(s) and Function(s) to be revoked.

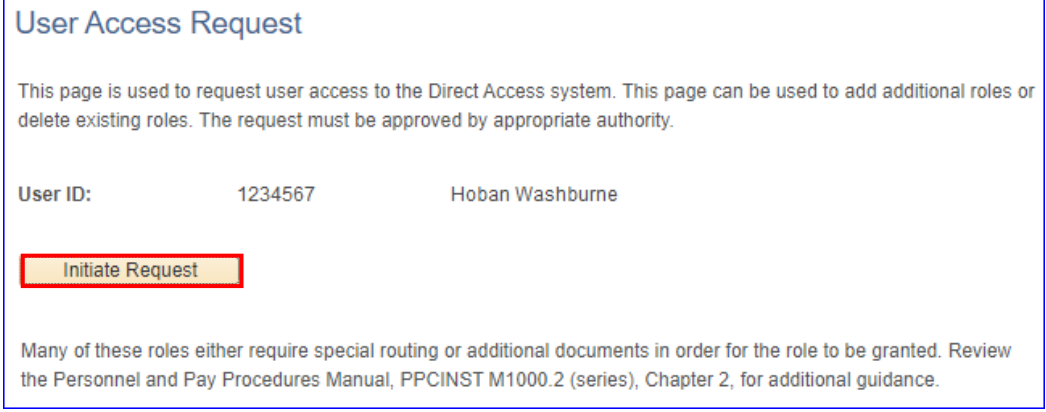
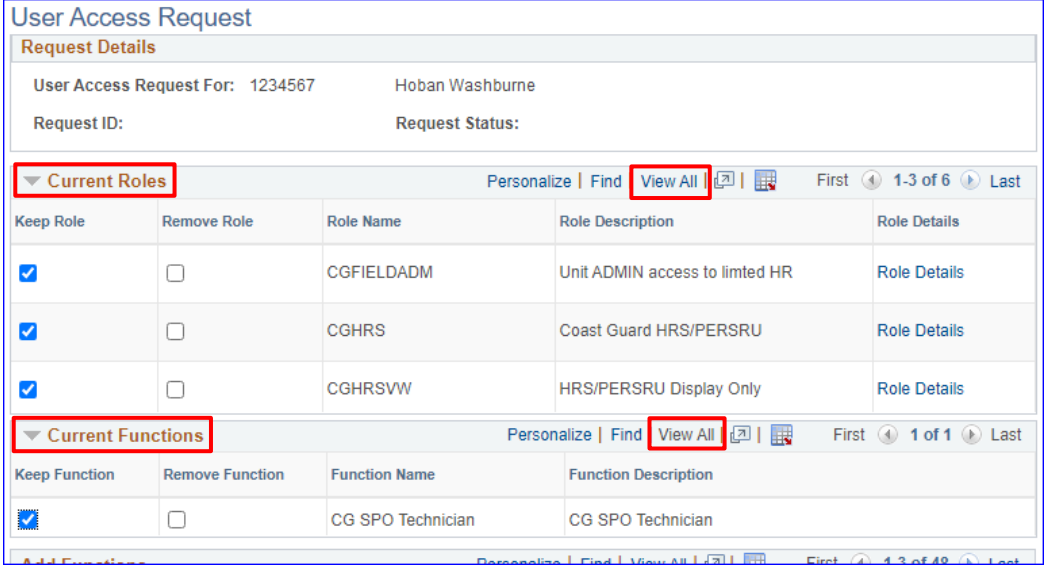
**Procedures** See below.

Step	Action
<p><b>1</b></p>	<p>After selecting <b>Requests</b> from the My Homepage drop-down, click on the <b>Self Service Requests</b> tile.</p> 
<p><b>1.5</b></p>	<p>Select the <b>User Access Request</b> option.</p> 

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# Removing User Roles, Continued

Procedures,  
continued

Step	Action
2	<p>The User Access Request page will display. Click <b>Initiate Request</b>.</p> 
3	<p>Any <b>Current Roles</b> and <b>Current Functions</b> for the member will display. Click <b>View All</b> (if necessary) to view the entire list of Current Roles and Current Functions.</p> 

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## Removing User Roles, Continued

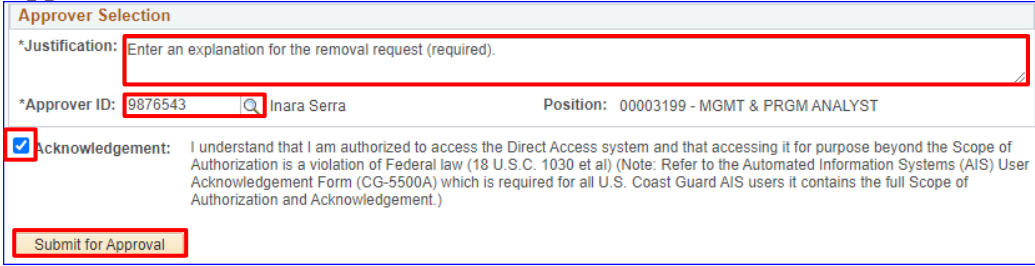
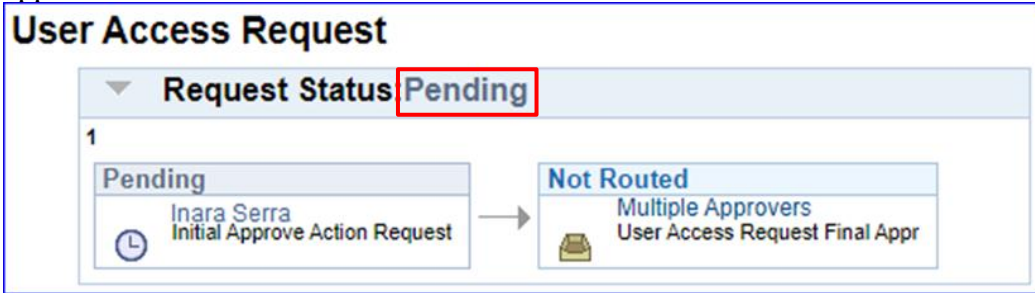
Procedures,  
continued

Step	Action																																											
4	<p>Check the <b>Remove Role</b> box for each Role and/or Function to be removed. <b>DO NOT REMOVE THE CGROWSEC_CGAD ROLE.</b></p> <p><b>NOTE:</b> For information on adding User Roles and Functions, see the <a href="#">Requesting New User Roles</a> section.</p> <div data-bbox="331 618 1369 1361" style="border: 1px solid black; padding: 5px;"> <p>User Access Request</p> <p><b>Request Details</b></p> <p>User Access Request For: 1234567      Hoban Washburne</p> <p>Request ID:      Request Status:</p> <hr/> <p><b>Current Roles</b>      Personalize   Find   View 3   [Print] [Grid]      First 1-6 of 6 Last</p> <table border="1"> <thead> <tr> <th>Keep Role</th> <th>Remove Role</th> <th>Role Name</th> <th>Role Description</th> <th>Role Details</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGFIELDADM</td> <td>Unit ADMIN access to limited HR</td> <td><a href="#">Role Details</a></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>CGHRS</td> <td>Coast Guard HRS/PERSRU</td> <td><a href="#">Role Details</a></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGHRVW</td> <td>HRS/PERSRU Display Only</td> <td><a href="#">Role Details</a></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGROWSEC_CGAD</td> <td>CG Active Duty Row Security</td> <td><a href="#">Role Details</a></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGSSCMD</td> <td>CG Self Service Command</td> <td><a href="#">Role Details</a></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGSSMBR</td> <td>CG Self Service Member</td> <td><a href="#">Role Details</a></td> </tr> </tbody> </table> <hr/> <p><b>Current Functions</b>      Personalize   Find   View All   [Print] [Grid]      First 1 of 1 Last</p> <table border="1"> <thead> <tr> <th>Keep Function</th> <th>Remove Function</th> <th>Function Name</th> <th>Function Description</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>CG SPO Technician</td> <td>CG SPO Technician</td> </tr> </tbody> </table> <p><b>Add Functions</b>      Personalize   Find   View All   [Print] [Grid]      First 1-3 of 48 Last</p> </div>	Keep Role	Remove Role	Role Name	Role Description	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGFIELDADM	Unit ADMIN access to limited HR	<a href="#">Role Details</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CGHRS	Coast Guard HRS/PERSRU	<a href="#">Role Details</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGHRVW	HRS/PERSRU Display Only	<a href="#">Role Details</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGROWSEC_CGAD	CG Active Duty Row Security	<a href="#">Role Details</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGSSCMD	CG Self Service Command	<a href="#">Role Details</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGSSMBR	CG Self Service Member	<a href="#">Role Details</a>	Keep Function	Remove Function	Function Name	Function Description	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CG SPO Technician	CG SPO Technician
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## Removing User Roles, Continued

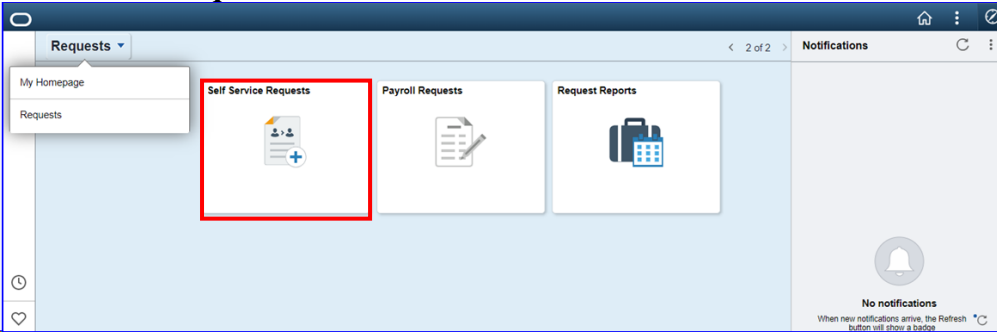
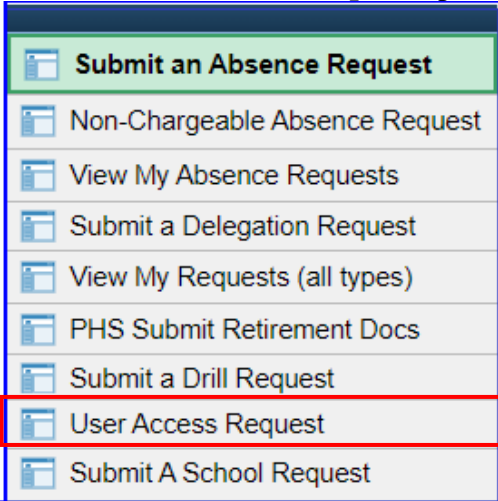
Procedures,  
continued

Step	Action
5	<p>Scroll to the bottom of the page and enter the <b>Justification</b> for removing the User Role/Function (required). Enter the <b>Approver ID</b> (approver's Employee ID number) or use the Lookup to locate the approver's Employee ID number.</p> <p>Review the statement and check the <b>Acknowledgement</b> box. Click <b>Submit for Approval</b>.</p> 
6	<p>Once submitted, the request will be placed in a <b>Pending</b> status and email notification will be sent to the Approver. It is important to follow up with the Approver. If the User Access Request is <b>not approved within 30 days, DA will automatically terminate the request</b> and email the submitted to submit a new request.</p> <p><b>NOTE:</b> Once the Approver approves the request, it will be sent to PPC for final approval.</p> 

# Withdrawing a User Roles Request

**Introduction** This section provides the procedures for withdrawing a User Roles Request in Direct Access (DA) in the event the Approver becomes unavailable (transferred, separated, TDY, etc.).

**Procedures** See below.

Step	Action
<p><b>1</b></p>	<p>After selecting <b>Requests</b> from the My Homepage drop-down, click on the <b>Self Service Requests</b> tile.</p>  <p>The screenshot shows a user interface with a 'Requests' dropdown menu open. The menu options are 'My Homepage' and 'Requests'. The 'Requests' option is selected, and a sub-menu is displayed with three tiles: 'Self Service Requests' (highlighted with a red border), 'Payroll Requests', and 'Request Reports'. The 'Self Service Requests' tile features a calendar icon with a plus sign. The background shows a notification area with a bell icon and the text 'No notifications'.</p>
<p><b>1.5</b></p>	<p>Select the <b>User Access Request</b> option.</p>  <p>The screenshot shows a vertical list of request options. The options are: 'Submit an Absence Request' (highlighted in green), 'Non-Chargeable Absence Request', 'View My Absence Requests', 'Submit a Delegation Request', 'View My Requests (all types)', 'PHS Submit Retirement Docs', 'Submit a Drill Request', 'User Access Request' (highlighted with a red border), and 'Submit A School Request'. Each option is preceded by a small document icon.</p>

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## Withdrawing a User Roles Request, Continued

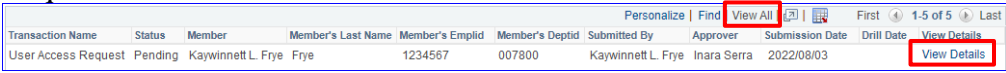
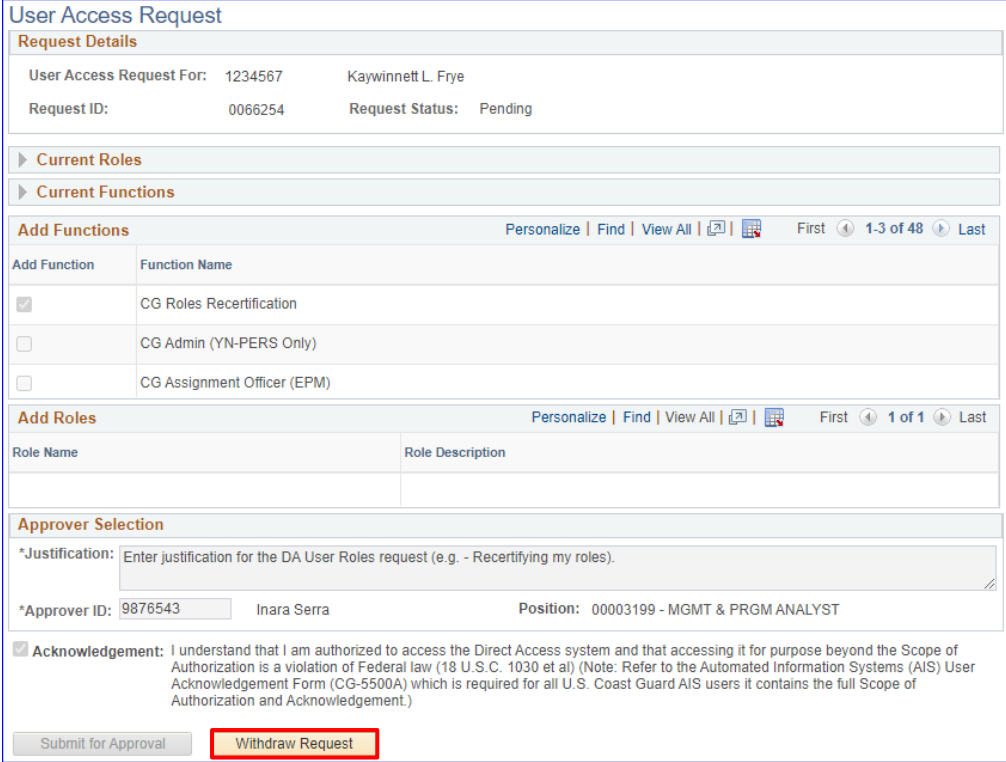
Procedures,  
continued

Step	Action
2	<p>The View My Action Requests page will display. Ensure the <b>My Submitted Requests</b> button is selected. The <b>Transaction Name</b> will default to All Transactions and the <b>Transaction Status</b> will default to Pending. Click <b>Populate Grid</b>.</p> <div data-bbox="357 551 1359 1171" style="border: 1px solid black; padding: 10px;"> <p><b>View My Action Requests</b></p> <hr/> <p>Kawinnett L. Frye</p> <ol style="list-style-type: none"> <li>1. 'My Submitted Requests' allows member to bring up only their Action Requests.</li> <li>2. 'Requests I am Approver For' allows approver to bring up only those Action Requests submitted to them.</li> <li>3. 'All Requests' allows the approver to pull up their Action Requests and those submitted to them.</li> <li>4. Transaction Name field allows user to select a particular transaction (i.e., Absence Request, Delegation, etc.)</li> <li>5. Refresh button clears the grid and defaults it back to 'My Submitted Requests' and Transaction Status of 'Pending'.</li> <li>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.</li> </ol> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <input checked="" type="radio"/> <b>My Submitted Requests</b>                  <input type="radio"/> Requests I am Approver For                  <input type="radio"/> All Requests         </div> <p>Transaction Name: <input type="text" value="All Transactions"/></p> <p>Transaction Status: <input type="text" value="Pending"/></p> <p>Submission From Date: <input type="text" value=""/> </p> <p>Submission To Date: <input type="text" value=""/> </p> <div style="text-align: right; margin-top: 5px;"> <input type="button" value="Populate Grid"/>                  <input type="button" value="Refresh"/> </div> </div>

*Continued on next page*

# Withdrawing a User Roles Request, Continued

Procedures,  
continued

Step	Action
3	<p>All pending requests will be listed. It may be necessary to click <b>View All</b> to see all pending requests. Scroll through the list and locate the User Access Request. Click <b>View Details</b>.</p> 
4	<p>The User Access Request will open in a new tab. Click <b>Withdraw Request</b>.</p> 
5	<p>The <b>Request Status</b> will update from <b>Pending</b> to <b>Terminated</b>. 'X' out of the tab to return to View My Requests (all types).</p> <p>A new User Access Request will need to be submitted (see the <a href="#">Requesting New User Roles</a> section for assistance).</p> 