

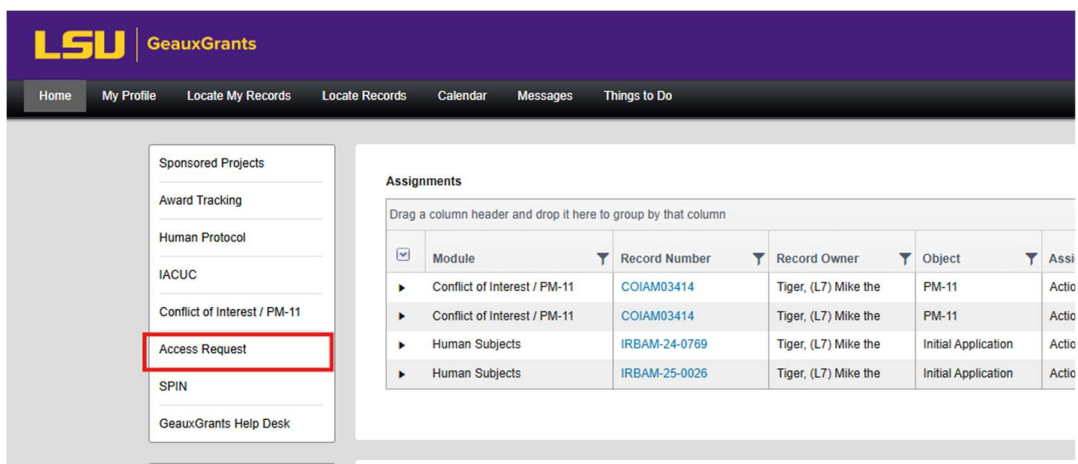
# Initiating a Delegation Request

# Overview

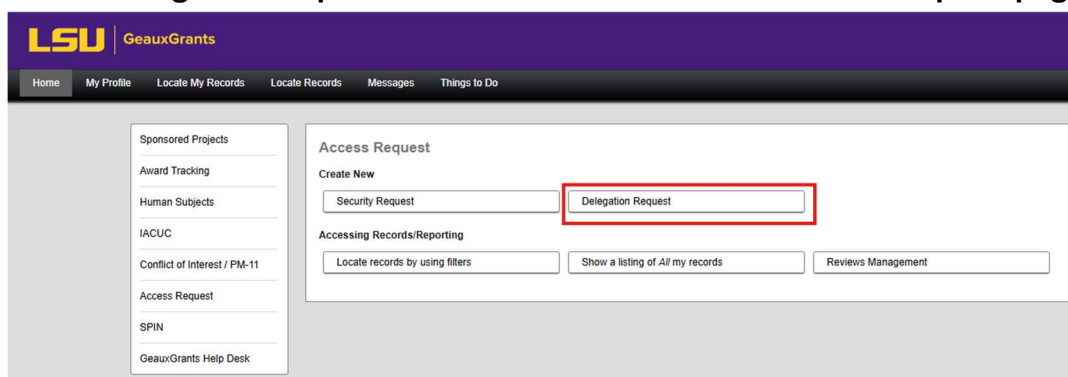
By default, LSU faculty and staff can access GeauxGrants. However, this access is limited to records for which a user is the principal investigator (PI). Users requiring expanded access/roles in GeauxGrants to complete their job duties can request this access via the Access Request module, available in GeauxGrants.

## Creating and Submitting the Delegation Request Form

1. Select “Access Request” on the left sidebar of the GeauxGrants portal.



2. Select “Delegation Request” under Create New on the Access Request page.



3.


4. To see the recipient's current security access, you may select the checkbox next to "Show Recipient's security?"

The screenshot shows the LSU Security Access Requests interface. On the left is a navigation menu with options: ROLES AND RESPONSIBILITIES, SECURITY ACCESS REQUESTS, ALL PAGES, and MANAGEMENT RECORD. The main content area is titled 'ROLES AND RESPONSIBILITIES' and features a checkbox labeled 'Show Recipient's security?' which is checked and highlighted with a red box. Below this is a 'Security Information' section containing a table with three columns: Function, System, and Scope. The table lists three entries: 'Access Module' with 'Access Request' and 'Louisiana State University'; 'Investigator' with 'Access Request' and an empty scope; and another 'Investigator' with 'Access Request' and 'Louisiana State University'. Below the table is a 'Delegation Information' section with a 'Delegate' field.

Function	System	Scope
Access Module	Access Request	Louisiana State University
Investigator	Access Request	
Investigator	Access Request	Louisiana State University

5. Select the appropriate response if you are requesting access on behalf of another individual. If "yes," then select the appropriate recipient. If "no," then you should populate into the recipient field.

The screenshot shows the 'RECIPIENT INFORMATION' section. It contains the question: 'Are you requesting access on the behalf of another individual?' followed by two radio buttons: 'Yes' (checked and highlighted with a red box) and 'No'. Below this is a prompt: 'Please select the appropriate person for whom you are requesting access for:'. There are two input fields: 'Recipient: Tiger, (L7) Mike the' (with a pencil icon and highlighted with a red box) and 'Supervisor:'.

6. Select the appropriate module and selection for "Add/Remove." By selecting "Remove All," you are indicating that all delegates for this user should be removed for the selected module. No additional information is required if selecting "Remove All."
7. Select the  symbol to add a new delegate request into the form. Multiple delegates can be requested for the recipient by clicking the + symbol. Select the trash can symbol to remove a delegate request from the form.
8. Select the appropriate user to receive delegated access (Delegate) using the pencil icon. The selected user would receive the ability to view and/or act upon behalf of the recipient of the request as configured with the options below.
9. Once completed, click "Complete" then "Submit." A window will appear with the approval route, select "Submit" on this page to complete the process.

## Review Process Overview

Upon submission, the request will be sent to the first reviewer following the applicable process below. This notification is received 3 ways: an email to the individual's LSU inbox, an internal notification to their GeauxGrants Messages, and from their GeauxGrants Assignments list. All methods contain a link to the Review Dashboard. The review is linear, and subsequent steps will not send out notifications until the current step is completed.

## Delegation Approval Process

