ITSM APPROVALS
MANAGING APPROVALS

NAVIGATING THE APPROVAL CENTRAL

The Approval Central is ITSM's "approval console".
It allows you to see all your approval requests in one place, and approve or reject them from that same screen. To get there:

1. On the **Applications** fly-out menu, choose **Quick Links**

2. Select **Approval Central**

3. The Approval Central shows a list of requests waiting for your approval. These can be infrastructure change requests or service requests.

4. The Approval Central displays some basic information about the request selected form the list. Notice that the request ID is a link. Clicking on this link will display more details about the change request (CRQ #) or service request (REQ #).

Note: To view ALL details about a change request, copy the CRQ# and search for the change request on the infrastructure change form.

5. The "Summary" Section to the left of the screen gives an "at-a-glance" view of your approvals.

6. Clicking on one of the items will refresh the list (example: "click on 'Need attention' to show approvals requiring attention).

7. The Approval Central displays all **pending**

Show Pending ⌄ (Type keywords here ⑦ 🔍 ⑧ **Advanced Search**

approvals **assigned to you** by default. However you can refine your search by using the basic search capability and changing the status and/or typing in keywords.

8. Click on '**Advanced Search**' to get more criteria.

Approval Search ⑧

Application		⌄	Status	Pending	⌄	Action Date		📅
Process		⌄	Requester		☰	Priority		⌄
Acting As	MySelf	⌄	Summary		☰	Modified Date		📅
User	PA36961	☰				Request ID		☰

APPROVING OR REJECTING ON THE APPROVAL CENTRAL

You can approve, reject, or place approvals on hold directly from the approval central. Change approvals can also be done within the Infrastructure Change ticket. See next page for how to.

9. Click on the check box, red 'x' or gray 'pause' signal to approve, reject or place an approval on hold.

Showing 1 - 4 of 4   Preferences ⌄   Refresh

☐	Alert	Actio...	Summary	Requester	Acting As	Priority	Application	Status			
☐			CRQ000000000705	Patrick Bourbon		Normal	CHG:Infrastructure Change	Pending	✅ ⑨ ⏸ 🔍
☐			CRQ000000002301	PA36961test		Low	CHG:Infrastructure Change	Pending	✅ ❌ ⏸ 🔍
☐			LAN/Remote Access	KA36649		Normal	SRM:Request	Pending	✅ ❌ ⏸ 🔍
☑			LAN/Remote Access	KA36649		Normal	SRM:Request	**Approved**	✅ ❌ ⏸ 🔍

10. Alternately, you can select multiple approvals and elect the "approve selected", "Reject selected" or "Hold Selected" buttons at the top of the list to take action on several requests at once.

Pending Approvals

✅ Approve Select ⑩ ❌ Reject Selected   ⏸ Hold Selected

Showing 1 - 4 of 4

☐	Alert	Actio...	Summary	Requester	Acting As
☑			CRQ000000000705	Patrick Bourbon	
☑			CRQ000000002301	PA36961test	
☑			LAN/Remote Access	KA36649	
☐			LAN/Remote Access	KA36649	

Tip: to avoid restarting a request's lifecycle when information is missing or questions are being answered, you can "hold" the approval instead of rejecting it. Then you can approve it later.

Note: Service Requests must be approved from the Approval Central. There is no option to approve from the service request form.

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11. When electing to 'Reject' the Request or Change a Justification should be provided in the pop up window to advise the submitter why the Request or Change has been rejected so they can update the ticket accordingly.

The approval process is configured to require user to specify a justification for rejection. Please enter the reason for the rejection in the box specified below.

Justification

OK   Cancel

MANAGING ALTERNATE APPROVERS

You can manage alternate approvers from the Approval Central.

12. First, click on the "My Alternate Approvers" link to the left of the screen.

Actions

My Alternate Approvers

13. The alternate approvers form opens. To add an alternate approver, type your alternate approver info and hit 'Save'.

Alternate Information	Administrative Information

Alternate*: AA23456   Notify Alternate*: Yes
For*: BB12345   Covering*: All
Start Date*: 1/22/2015 12:00:00 AM   Process:
Date: 1/28/2015 12:00:00 AM   Process Instance Id:
Assignee Group: Public   Status: Future

Save   Close

14. To cancel an alternate approver, select "New Search" at the top, type in your login ID in the "For*" field and hit "search".

Search   Close

15. Select the approver you wish to cancel and select "cancel alternate".

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Cancel Alternate

16. Select '**Close**' to return to Approval Central.

Note: You must know your alternate approver's login ID to add an alternate approver.

APPROVAL EMAILS

If your profile is configured to receive approval notifications, you will receive an email when you have an approval pending.

17. The email contains key information about the service or infrastructure change request in question.

18. For a Change approval you can click on the CRQ number to view it in ITSM

19. For Change or Request approvals, at the bottom of the email, you can click on "Launch Approval Central" to view your list of pending approvals.

Note: Do not reply to the approval email.

From: ■ Remedy   @ Bell Aliant <DO_NOT_REPLY@bellaliant.ca>
To:
Cc:
Subject: Change Request CRO000000000705 requires your approval. TEST Change Template (temporary)

Approval Notification

Request Details:

Infrastructure Change ID: CRQ000000000705
Service CI: Application Management
Summary: TEST Change Template (temporary)

Launch Approval Central

ITSM APPROVALS
MANAGING CHANGE APPROVALS

APPROVING OR REJECTING ON THE INFRASTRUCTURE CHANGE

You can also approve or reject within the Infrastructure Change.

1. On the infrastructure change, "Work Details" Tab, your approvals for the current phase of the change request are listed at the bottom.

2. Click on the "**show**" menu to change the criteria used to display the approvals.

3. To approve the change, select your approval, and click on the "**Approve**" button.

4. To reject the change double click on your approval signature

5. In the Change Signature window select Rejected for the Approval Status.

6. Add the Justification to advise the submitter why the Change has been rejected so they can update the ticket accordingly.

7. Save

> **Note:** You can only approve or reject when the approval is in "**Pending**" status.

AD-HOC APPROVERS

The Change Coordinator or Change Manager can add Ad-Hoc approvers to the infrastructure change request.

1. Click on the "Add" button below the list of approvals.

2. Specify the group or individual approver that you want to add.

3. Select the approval phase to add the approver to.

4. Click save.

AD-HOC APPROVERS CONTINUED

> ⭐ *Tip: Only current approvers or ad-hoc approvers can be deleted from a change. If a future default approver needs to be deleted it can be done when the change moves to the approval phase that the approver is defaulted to.*

> **Note:** All Approvals except Change Management should be added to the **Business approval phase**. If the change is already in Implementation Approval you'll only be able to add them to that phase.

DELETING APPROVERS

Only Ad-Hoc or current approval phase approvers can be deleted from the infrastructure change request.

1. Select the approver to delete and click on the "Delete" button below the list of approvals.

   🔍 View Notification   👥Add   ⛔Delete   ✅ Approve   ❌ Reject

2. To view any approvers that have been deleted change the 'Show' menu to

   Show   Cancelled ▾
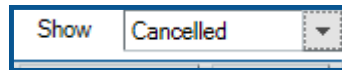
> **Note:** If the Delete button is grayed out that means it's a future approval and cannot be deleted until the change moves to approval phase the approver will be added to.

NOTIFY APPROVERS

Sometimes approvers are mapped as Notify only, this can only be done through approval mappings not as part of adding ad-hoc approvers. Notify approvers can be viewed on a change by following these steps:

1. Click on the "View Notifications" button below the list of approvals.

   ① 🔍 View Notification 👥Add ⛔Delete ✅ Approve ❌ Reject

2. Change the Status to "Pending" or "Notified'

3. The approvers will show in the list, depending on the approval phase they may show as Pending or Notified
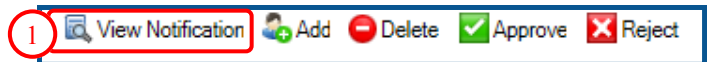
   Non-Approver Notifications

Notification For*	Individual ▾
First Name	
Last Name+	

   Add   Clear

   Status   Pending ▾
   ②   Notified / Pending
   (clear)

   0 entries returned - 0 entries matched

Status	Approval Phase Name	Display Name

   1 entries returned - 1 entries matched

Status	Approval Phase Name	Display Name
Notified ③	Business Approval	Cynthia Best

> **Note:** The Non-Approver (Notify) Notifications won't go out until the last approval on the Business Approval Phase has been completed

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