



California
DEPARTMENT OF TECHNOLOGY
Office of Technology Services

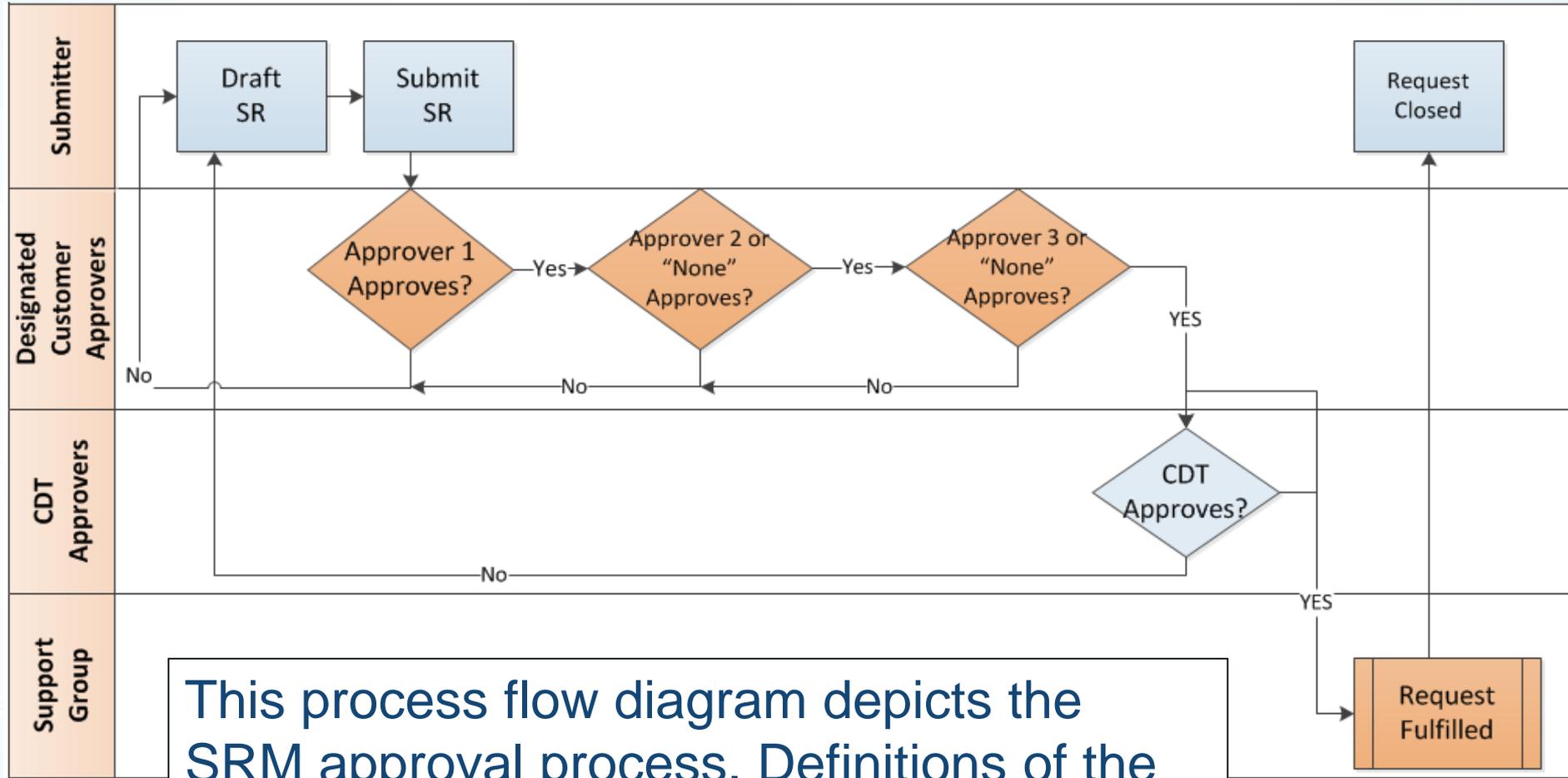
SRM Approval Process

Module Objectives

- **Lesson 1: Approval Process Overview**
- **Lesson 2: How to Submit an SR to Receive Approval**
- **Lesson 3: How to Check the Approval Status**
- **Lesson 4: How to Handle a Rejected SR**

Lesson 1

Approval Process Overview



This process flow diagram depicts the SRM approval process. Definitions of the swim lanes are included on the next slide.

Lesson 1

Approval Process Overview



Swim Lane Definitions

Submitter: This represents the customer that is requesting service from a CDT business or technical unit.

Designated Customer Approvers: This represents the designated approvers and their alternates for the Submitter's Department.

CDT Approvers: This represents the CDT approvers (e.g., Service Supervisor, Security, Financials, etc).

Support Group: This represents the CDT group that supports the service requested.

Lesson 1

Approval Process Overview

Each department can have an unlimited list of Approvers in SRM. Each service request can have between one and three approvers as designated by their department.

Other - Internal [X]

Requested By: Christine Blake Phone: 1 916 431-5538 [Edit]
Requested For: Christine Blake Email: christine.blake@state.ca.gov

Required Completion: [] []

Attachments: [+] [+] [+]

Billing Prefix * [] [v]
Account Code: []

Approver * [] [v]
Second Approver * [] [v]
Third Approver * [] [v]

Do you wish to expedite this request? No Yes

Are you requesting a cost estimate? * Yes No - Does not require a cost estimate
 No - I have received a cost estimate

What is the nature of your request? * [] [v]
What is your approved budget amount? []
Depending on what you are requesting, a budget amount may be required. (Examples: New server or software license). Leaving this blank may result in delays or rejection of this request.

I understand that OTech will charge my department the applicable rates and/or pass-through charges for the services being requested. * Yes
Please check our [rates](#).

Fund: []
Reporting Unit: []
Expenditure Code: []
Cost Center Code: []

[Summary] [Add To Cart] [Save As Draft] [Submit]

Lesson 2

How to Submit an SR to Receive Approval



Approver *

Second Approver *

Third Approver *

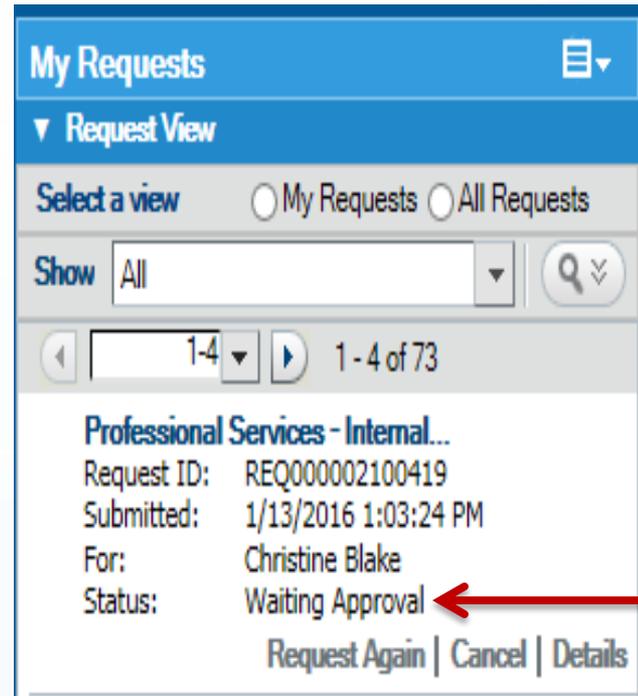
When completing the service request, the submitter will select or populate their management in hierarchal order, with their immediate manager/supervisor as the first Approver, and the next level of management for the Second and Third Approver. If the request only requires one or two approvers the submitter can select “None” in place of a specific member of management. As a best practice, the submitter should not select the same approver more than once.

Lesson 2

How to Submit an SR to Receive Approval



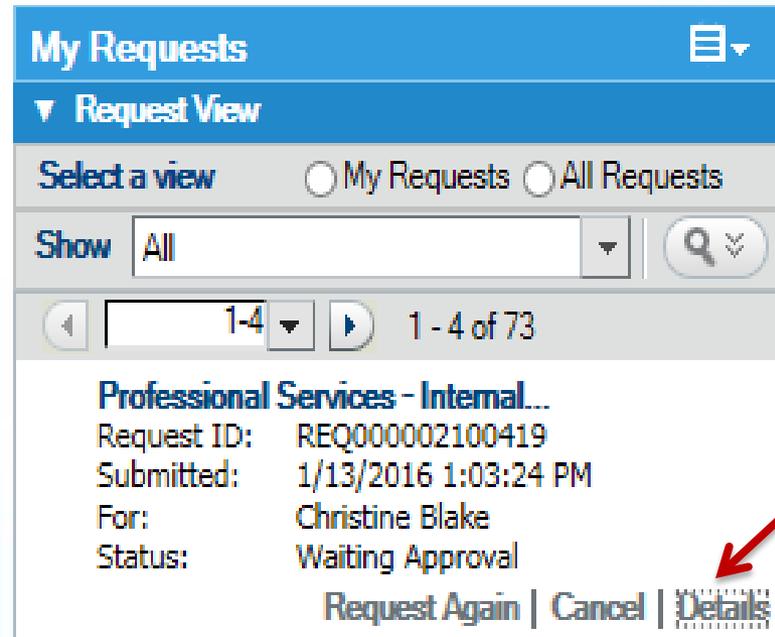
Once the request is submitted, it will be displayed in the “My Requests” console. The submitter can then see when the request is in “Waiting Approval” status.



Lesson 3

How to Check the Approval Status

Click the “Details” link in order to identify who has and has not approved the request.



My Requests 

▼ Request View

Select a view My Requests All Requests

Show All 

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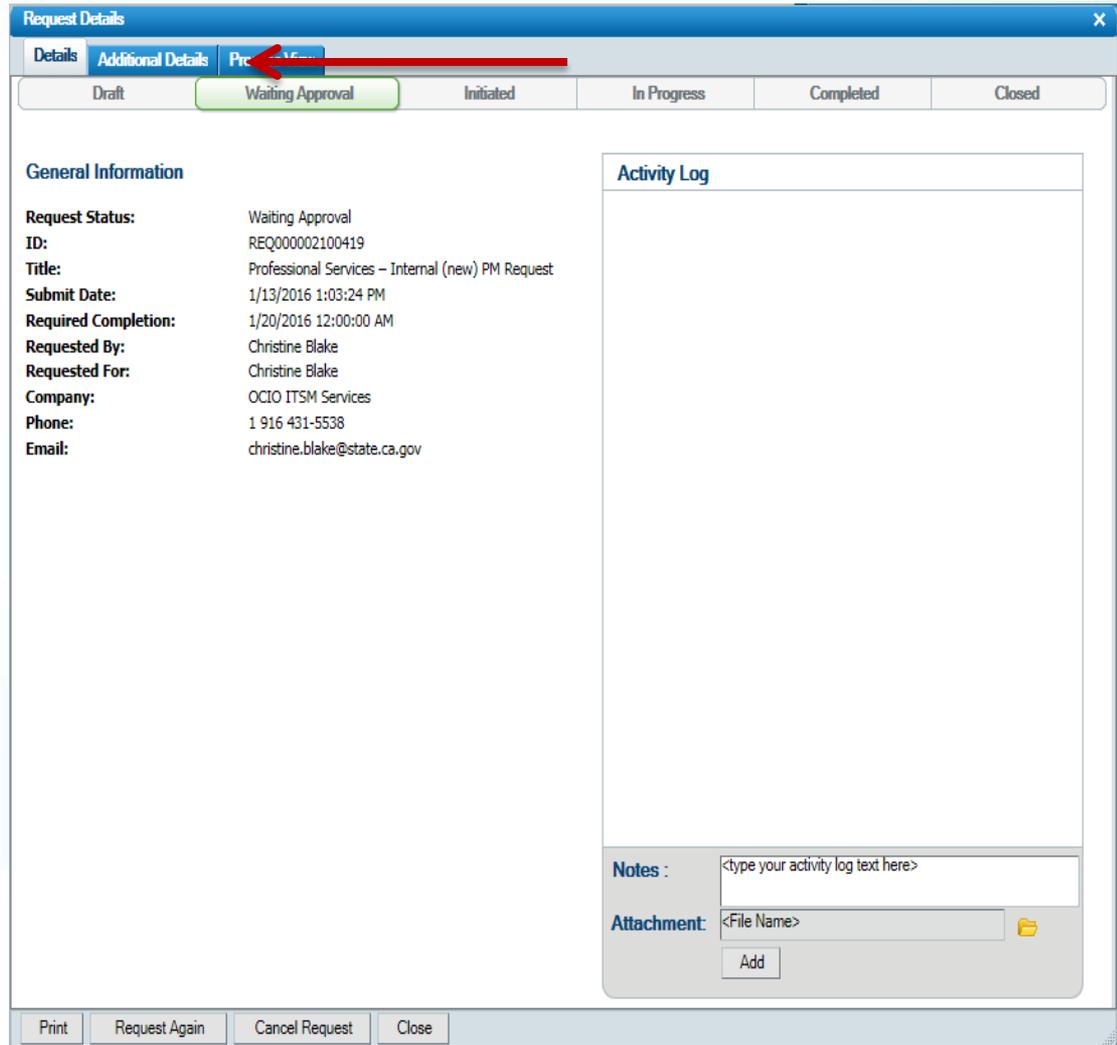
Professional Services - Internal...
Request ID: REQ000002100419
Submitted: 1/13/2016 1:03:24 PM
For: Christine Blake
Status: Waiting Approval

[Request Again](#) | [Cancel](#) | [Details](#)

Lesson 3

How to Check the Approval Status

After selecting the “Details” link, the submitter can select “Additional Details” to identify which approvers queue the request is in.



Request Details

Details Additional Details **Waiting Approval** Initiated In Progress Completed Closed

General Information

Request Status:	Waiting Approval
ID:	REQ00002100419
Title:	Professional Services – Internal (new) PM Request
Submit Date:	1/13/2016 1:03:24 PM
Required Completion:	1/20/2016 12:00:00 AM
Requested By:	Christine Blake
Requested For:	Christine Blake
Company:	OCIO ITSM Services
Phone:	1 916 431-5538
Email:	christine.blake@state.ca.gov

Activity Log

Notes : <type your activity log text here>

Attachment: <File Name> 

Add

Print Request Again Cancel Request Close

Lesson 3

How to Check the Approval Status

The Approval History will display each approver, the status, the approver's electronic signature, and the date and time of the approval.

Once the request is approved by all of the selected approvers, the request status will change to "Initiated" or "In Progress."

Approval History	
Approver: Kami Dudley	Status: Approved
Signed By: kadudley	Date: 7/29/2015 3:57:44 PM
Justification:	
<hr/>	
Approver: Approver Not Required	Status: Approved
Signed By: dccd40	Date: 7/30/2015 8:10:22 AM
Justification:	
<hr/>	
Approver: Approver Not Required	Status: Approved
Signed By: dccd40	Date: 7/30/2015 8:10:42 AM
Justification:	

Lesson 3

How to Check the Approval Status



Once the service request is approved by your department the CDT approval process will begin. Depending on the service request form chosen, your SRD may have to receive additional approval from CDT Security and Financial approvers. Specific requests for services are automatically routed to the appropriate service area for approval.

Approval History

Approver:

Louis Arredondo

Status:

Approved

Signed By:

carri.stokes

Date:

1/21/2016 2:28:21 PM

Justification:**Approver:**

Anthony Lewis;Kary Marshall;Sahana Ayer

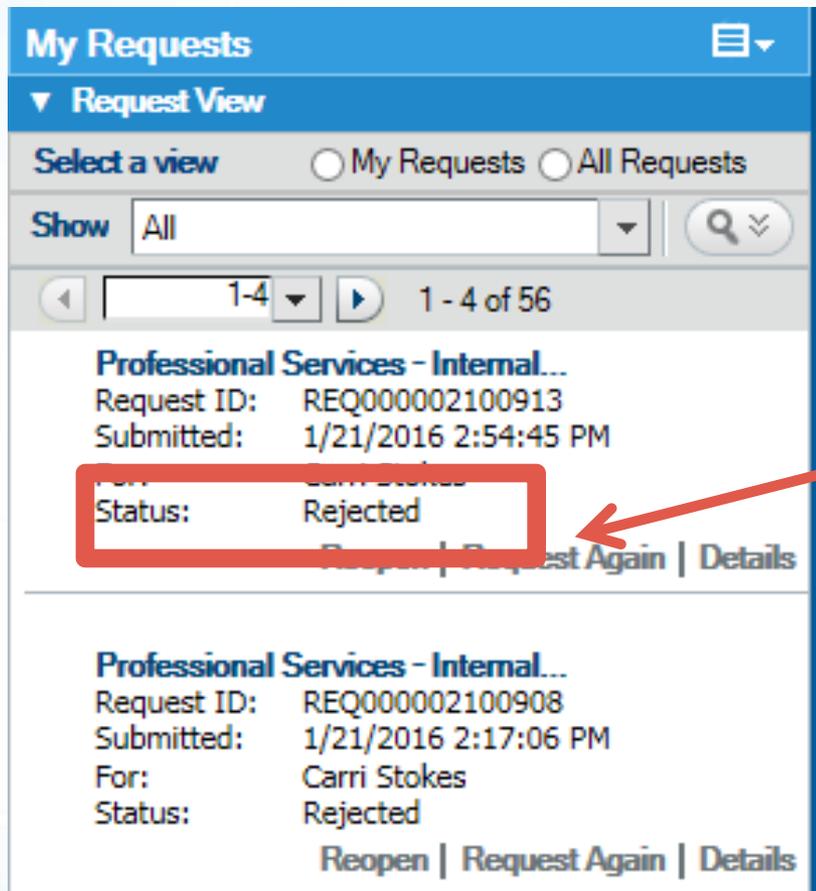
Status:

Pending

Signed By:**Date:****Justification:**

Lesson 4

How to Handle a Rejected SR



My Requests

Request View

Select a view My Requests All Requests

Show All

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Professional Services - Internal...
Request ID: REQ000002100913
Submitted: 1/21/2016 2:54:45 PM
Status: Rejected
Reopen | Request Again | Details

Professional Services - Internal...
Request ID: REQ000002100908
Submitted: 1/21/2016 2:17:06 PM
For: Carri Stokes
Status: Rejected
Reopen | Request Again | Details

Once the request is approved or rejected, the status of the request will change to show the submitter the most recent action.

Lesson 4

How to Handle a Rejected SR

Request Details

Details Additional Details Process View

Question Responses

Billing Prefix * :	DC
Account Code :	
Approver * :	Louis Arredondo
Second Approver * :	None
Third Approver * :	None
Do you wish to expedite this request? :	No
Are you requesting a cost estimate?* :	No - Does not require a cost estimate
What is your approved budget amount? :	
I understand that OTech will charge my department the applicable rates and/or pass-through charges for the services being requested. * :	Yes

Approval History

Approver:
Louis Arredondo

Status:
Rejected

Signed By:
carri.stokes

Date:
1/21/2016 2:56:31 PM

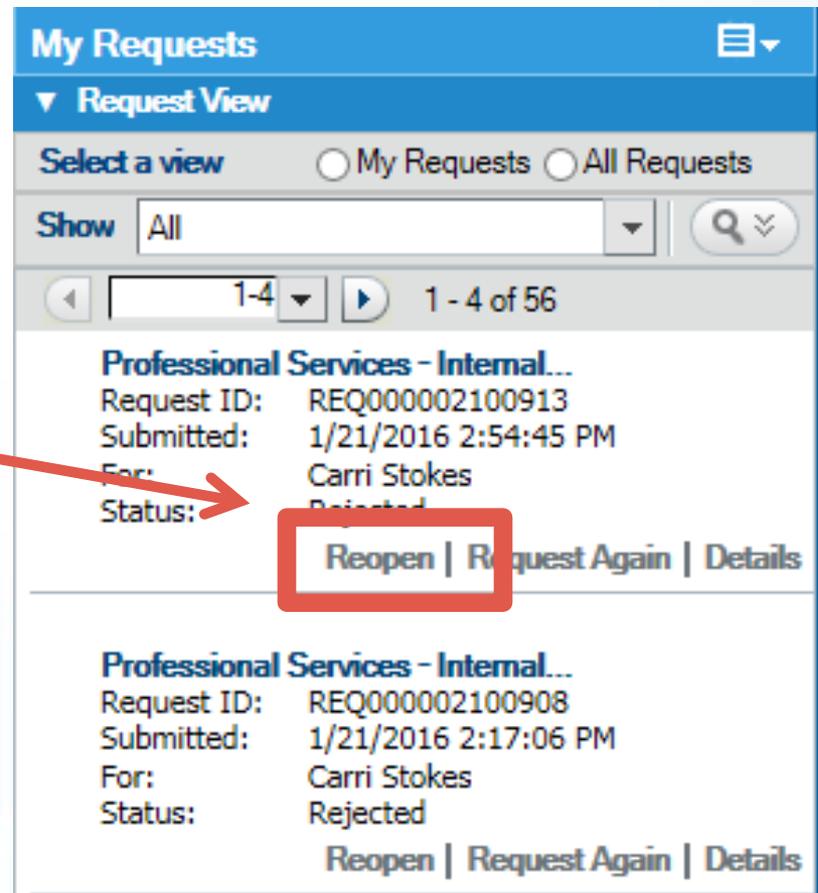
Justification:
Insufficient information included for this request. Please fill out the form completely.

To locate the rejection justification, click on the Additional Details tab from the Request Details screen, then view the Approval History.

Lesson 4

How to Handle a Rejected SR

If the request has been rejected there will be a “Reopen” option below the status. This allows the submitter to add or attach any additional information needed and resubmit the request for approval.



My Requests 

▼ Request View

Select a view My Requests All Requests

Show All 

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Professional Services - Internal...
Request ID: REQ000002100913
Submitted: 1/21/2016 2:54:45 PM
For: Carri Stokes
Status: Rejected
Reopen | Request Again | Details

Professional Services - Internal...
Request ID: REQ000002100908
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