



California
DEPARTMENT OF TECHNOLOGY
Office of Technology Services

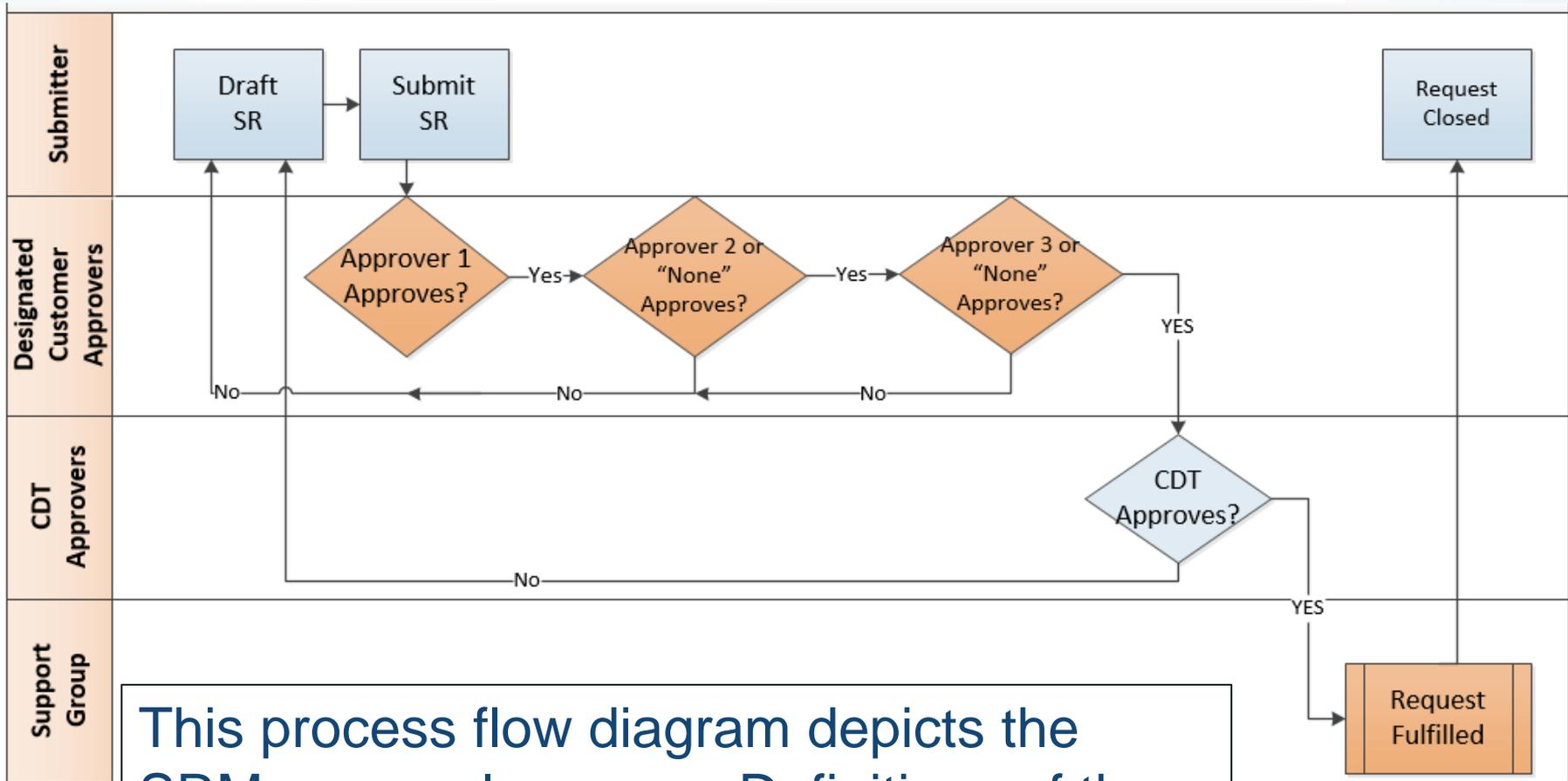
SRM Approval Process for Approvers/Alternates

Module Objectives

- Lesson 1: Approval Process Overview
- Lesson 2: How to Approve/Reject SR's
- Lesson 3: How to Set Up Alternate Approvers

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.

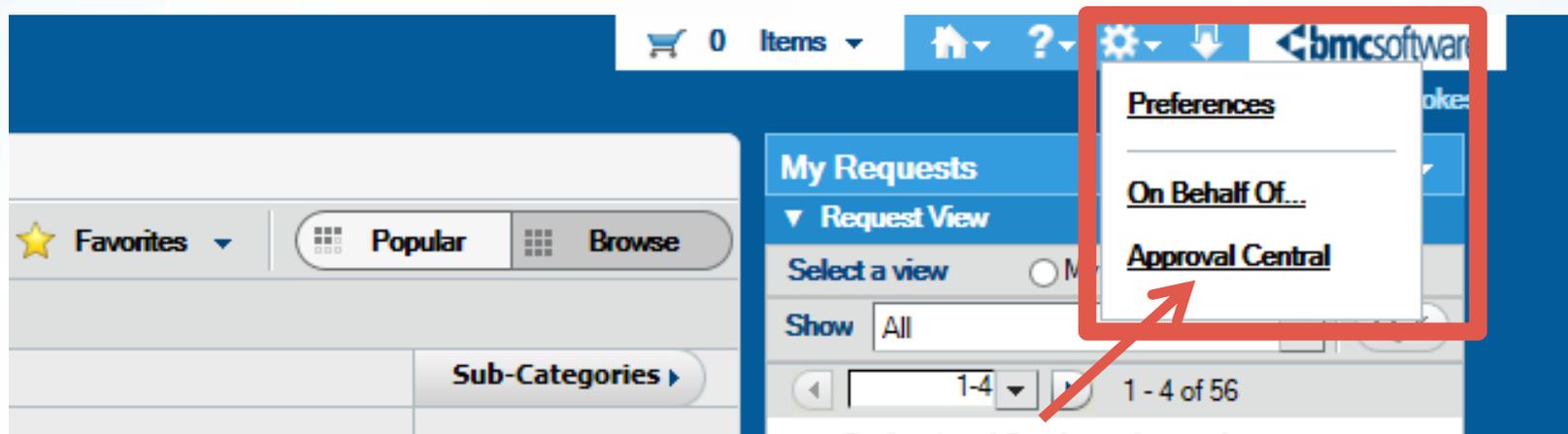
I understand that OTech will charge my department the applicable rates and/or pass-through charges for the services being requested. * Yes
Please check our [rates](#).

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

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

Lesson 2

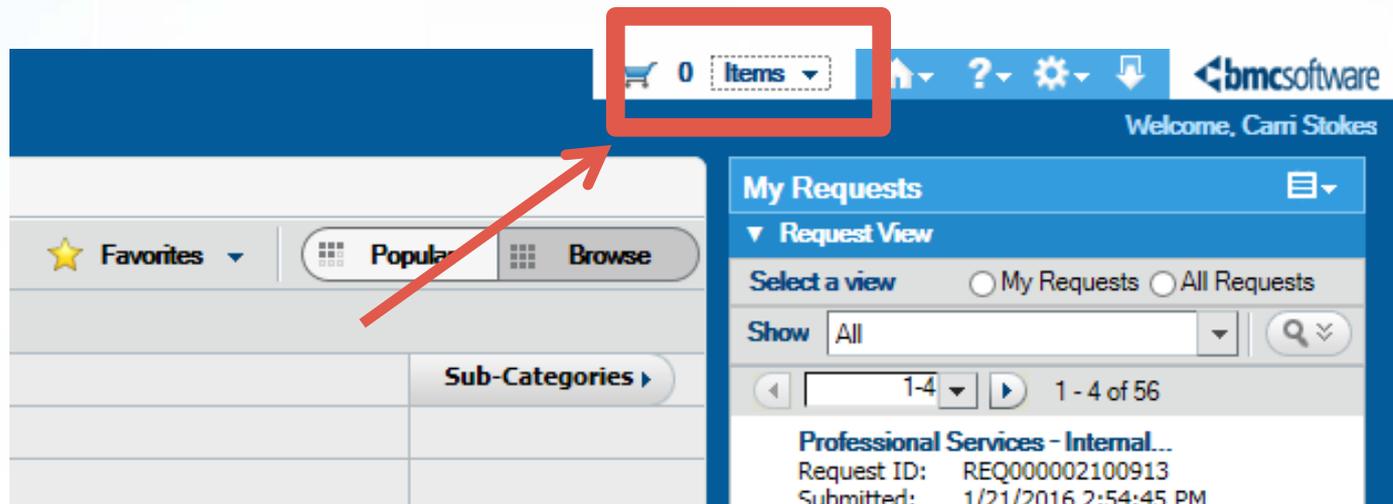
How to Approve/Reject SR's



To view, approve, or reject a service request, access Approval Central by clicking the Settings icon, then select Approval Central.

Lesson 2

How to Approve/Reject SR's



If there are approvals in queue a notification will be displayed to the right of the shopping cart located on the Menu Bar.

Lesson 2

How to Approve/Reject SR's

Approval Search Result

Approve Selected Reject Selected Hold Selected

Showing 1 - 5 of 54 Preferences ▾ Refresh

<input type="checkbox"/>	Alert	Action Date	Summary	Requester	Acting As	Priority	Application	Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>			Other - Internal (ne tervin			Normal	SRM:Request	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>			Other - Internal (new george.vargas			Normal	SRM:Request	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>			Other - Internal michael.todd			Normal	SRM:Request	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>			Other - Internal sherry.barandas			Normal	SRM:Request	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>			Professional Service david.langston			Normal	SRM:Request	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Approvers and their designated alternate approvers use Approval Central to access request details and approve requests. Approvers can approve, reject, or view the details of a request by using the appropriate buttons.

Lesson 2

How to Approve/Reject SR's

Approval Search Result

Approve Selected Reject Selected Hold Selected

Showing 1 - 5 of 57 Preferences Refresh

<input type="checkbox"/>	Alert	Action Date	Summary	Requester	Acting As	Priority	Application	Status						
<input type="checkbox"/>			Other - Internal (new tervin			Normal	SRM:Request	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>			Other - Internal (new david.wood			Normal	SRM:Request	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>			Other - Internal (new george.vargas			Normal	SRM:Request	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>			Other - Internal	michael.todd		Normal	SRM:Request	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>			Other - Internal	shery.harandas		Normal	SRM:Request	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Justification For Rejection :

Request Details

Request ID: [REQ000002083202](#) Price: 0.00 USD

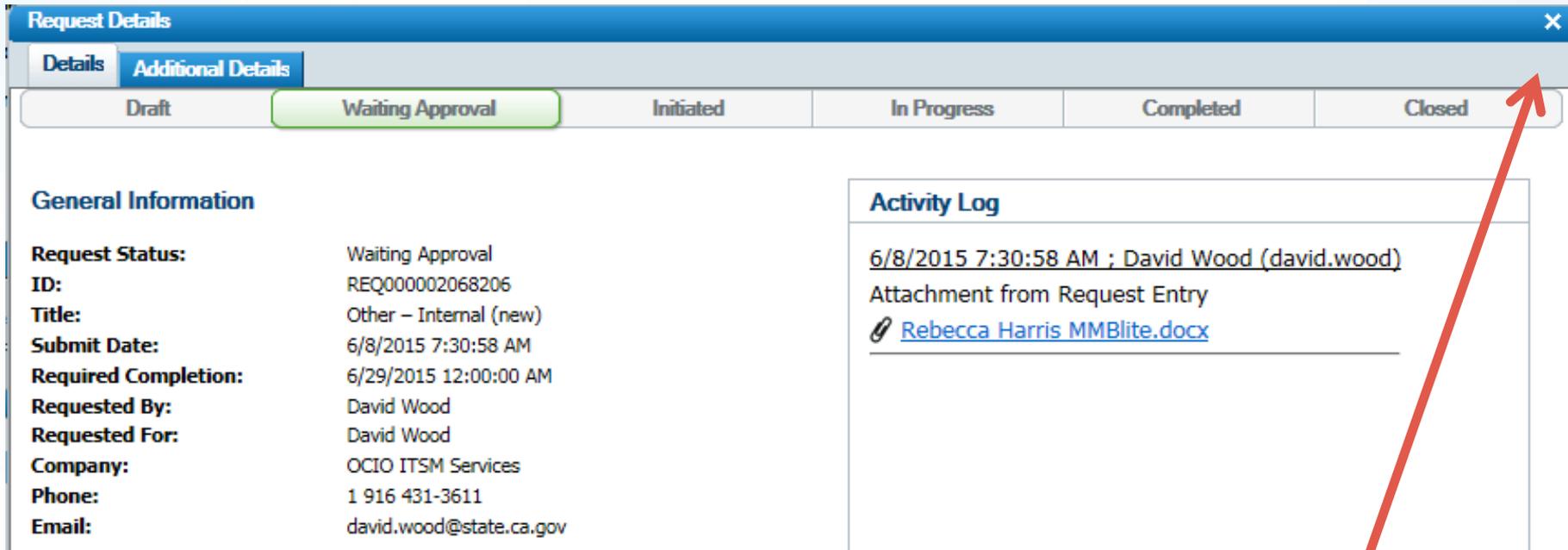
Action Date: Request Date: 8/26/2015 1:00:59 PM

Priority: Normal

To view the details of a submitted service request, click on the service request that you want to view in order to have it display below. Once displayed, click on the Request ID hyperlink to view the request in detail.

Lesson 2

How to Approve/Reject SR's



The screenshot shows a web application window titled "Request Details" with a close button (X) in the top right corner. The window has two tabs: "Details" and "Additional Details". Below the tabs is a progress bar with six stages: "Draft", "Waiting Approval" (highlighted in green), "Initiated", "In Progress", "Completed", and "Closed". A red arrow points from the bottom right towards the close button. The main content area is divided into two sections: "General Information" on the left and "Activity Log" on the right.

General Information	
Request Status:	Waiting Approval
ID:	REQ000002068206
Title:	Other – Internal (new)
Submit Date:	6/8/2015 7:30:58 AM
Required Completion:	6/29/2015 12:00:00 AM
Requested By:	David Wood
Requested For:	David Wood
Company:	OCIO ITSM Services
Phone:	1 916 431-3611
Email:	david.wood@state.ca.gov

Activity Log
6/8/2015 7:30:58 AM ; David Wood (david.wood)
Attachment from Request Entry
Rebecca Harris MMBlite.docx

After clicking the Request ID hyperlink it will bring you to the details of the service request where you can validate that the request was completed properly. When you are finished reviewing the request, exit it by clicking the “X” at the top right.

Lesson 2

How to Approve/Reject SR's

Approval Search Result

Approve Selected Reject Selected Hold Selected

Showing 56 - 57 of 57 Preferences Refresh

<input type="checkbox"/>	Alert	Action Date	Summary	Requester	Acting As	Priority	Application	Status						
<input type="checkbox"/>			windows Hosting Se stacylong			Normal	SRM:Request	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>			Other - Internal (new david.wood			Normal	SRM:Request	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Justification For Rejection :

To approve a single request, select the request and a checkmark will display on the left. Once the request is selected click the green Approve button displayed on the right, or the Approve Selected button at the top.

Lesson 2

How to Approve/Reject SR's

The Approval History will display each approver, the status, the approvers 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 2

How to Approve/Reject SR's



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

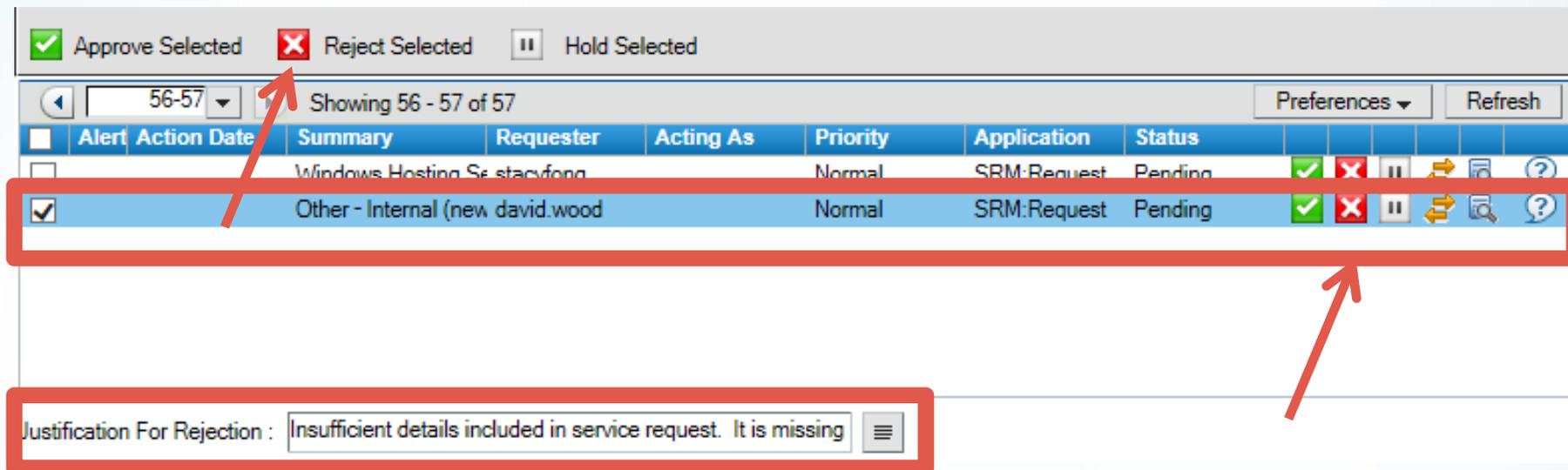
Signed By:

Date:

Justification:

Lesson 2

How to Approve/Reject SR's



The screenshot displays a service request management interface. At the top, there are three buttons: "Approve Selected" (with a green checkmark), "Reject Selected" (with a red X), and "Hold Selected" (with a pause icon). Below these is a search bar showing "56-57" and "Showing 56 - 57 of 57". A table of requests is shown with columns: Alert, Action Date, Summary, Requester, Acting As, Priority, Application, and Status. The second row is highlighted in blue and contains the text "Other - Internal (new david.wood)", "Normal", and "SRM:Request". To the right of this row are icons for approve (green checkmark), reject (red X), hold (pause), and other actions. Below the table is a "Justification For Rejection" box containing the text "Insufficient details included in service request. It is missing".

Alert	Action Date	Summary	Requester	Acting As	Priority	Application	Status					
<input type="checkbox"/>		Windows Hosting Se stacy.forn			Normal	SRM:Request	Pending	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>		Other - Internal (new david.wood			Normal	SRM:Request	Pending	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Justification For Rejection :

To reject a single request, select the request and populate the Justification for Rejection box. Be sure to include a clear description of what the request is missing and why you are rejecting the request. Once completed click the red Reject button displayed on the right, or the Reject Selected button at the top.

Lesson 2

How to Approve/Reject SR's

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

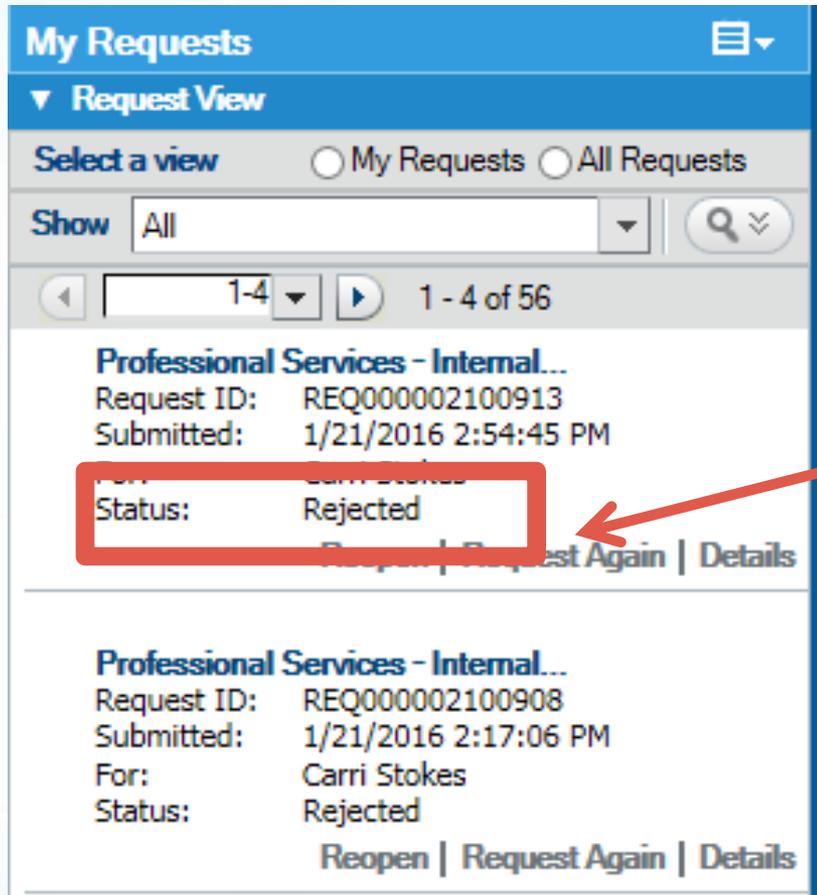
Justification:
Insufficient information included for this request. Please fill out the form completely.



Once rejected, the submitter will be able to view the reason for rejection when they access their request and click on the Additional Details tab from the Request Details screen, then view the Approval History.

Lesson 2

How to Approve/Reject SR's



My Requests 

▼ **Request View**

Select a view My Requests All Requests

Show All 

1-4 1 - 4 of 56

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

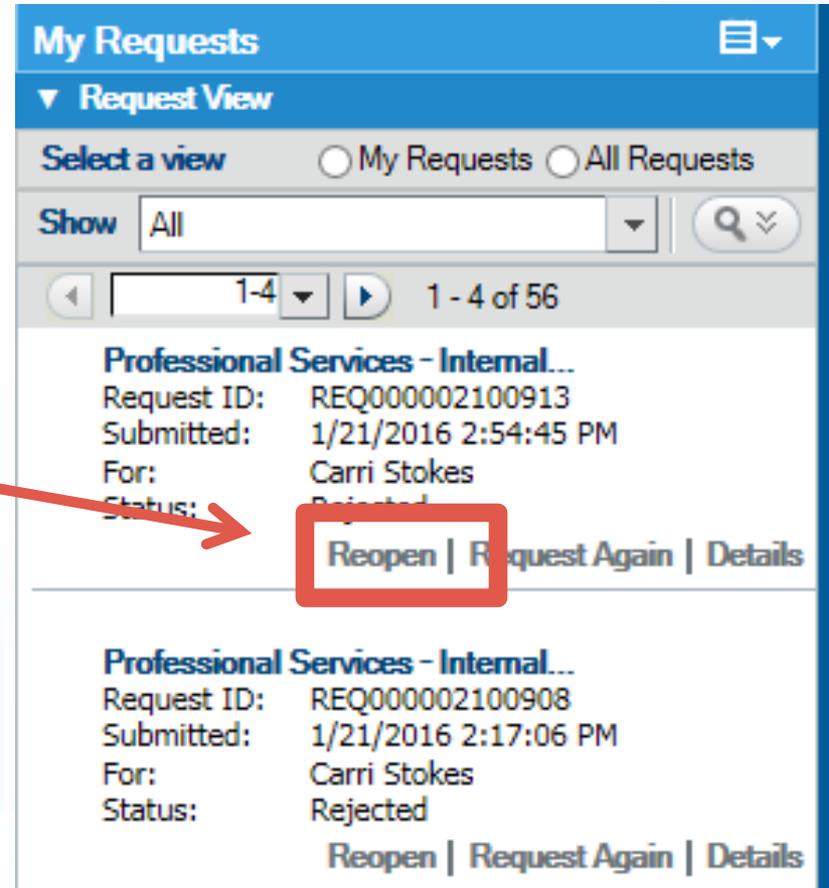
Professional Services - Internal...
Request ID: REQ000002100908
Submitted: 1/21/2016 2:17:06 PM
For: Carri Stokes
Status: Rejected
[Reopen](#) | [Request Again](#) | [Details](#)

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

Lesson 2

How to Approve/Reject SR's

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

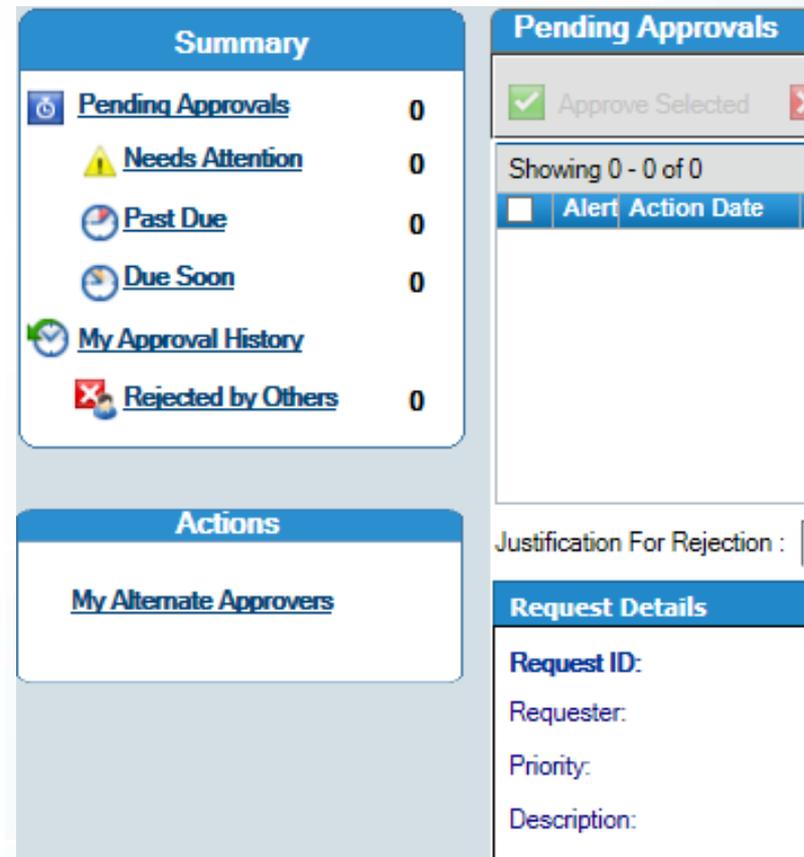


The screenshot displays the 'My Requests' interface. At the top, there is a blue header with the title 'My Requests' and a menu icon. Below the header, there is a 'Request View' section with a dropdown menu set to 'Request View'. Underneath, there are radio buttons for 'My Requests' and 'All Requests', and a 'Show' dropdown menu set to 'All'. A search icon is also present. The main content area shows a list of requests. The first request is titled 'Professional Services - Internal...' with the following details: Request ID: REQ000002100913, Submitted: 1/21/2016 2:54:45 PM, For: Carri Stokes, and Status: Rejected. Below the status, there are three links: 'Reopen', 'Request Again', and 'Details'. A red box highlights the 'Reopen' link, and a red arrow points from the text on the left to this link. The second request in the list has the same title and details, but its status is 'Rejected' and it also has 'Reopen', 'Request Again', and 'Details' links.

Lesson 3

How to Set Up Alternate Approvers

There are times when a designated approver will be temporarily unavailable, and an alternate approver will need to be set up in their place. Only the designated approver can set up their alternate in SRM.



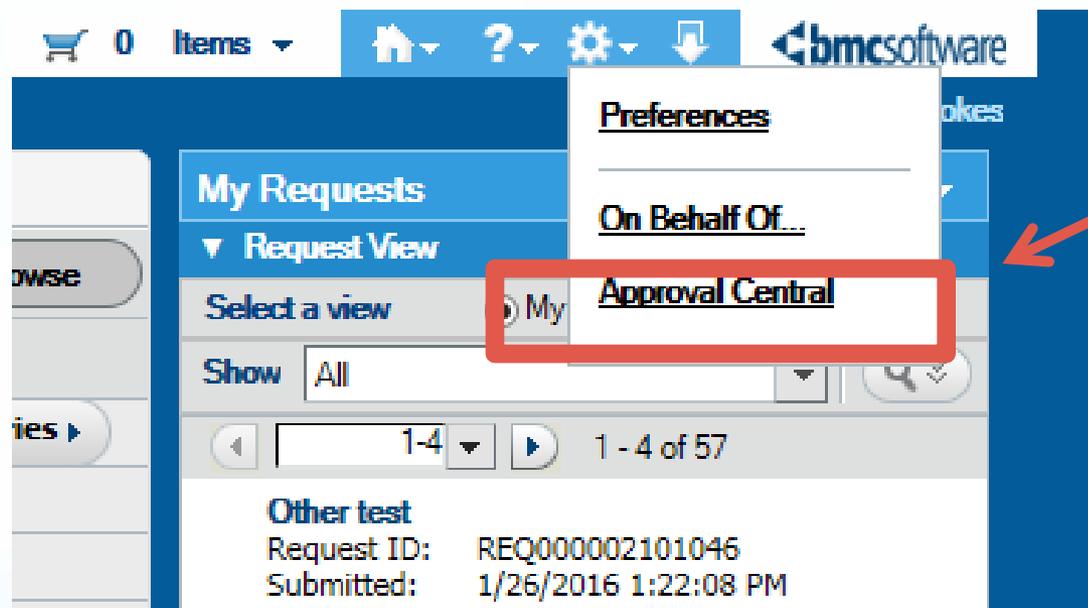
The screenshot displays the SRM interface with the following sections:

- Summary:** A list of metrics with icons and counts:
 - [Pending Approvals](#) 0
 - [Needs Attention](#) 0
 - [Past Due](#) 0
 - [Due Soon](#) 0
 - [My Approval History](#)
 - [Rejected by Others](#) 0
- Actions:** A section containing the link [My Alternate Approvers](#).
- Pending Approvals:** A section with a green checkmark icon and the text "Approve Selected", a "Showing 0 - 0 of 0" indicator, and a table header with "Alert" and "Action Date" columns. The table is currently empty.
- Request Details:** A section with a blue header and the following fields:
 - Request ID:
 - Requester:
 - Priority:
 - Description:
- Justification For Rejection:** A text input field.

Lesson 3

How to Set Up Alternate Approvers

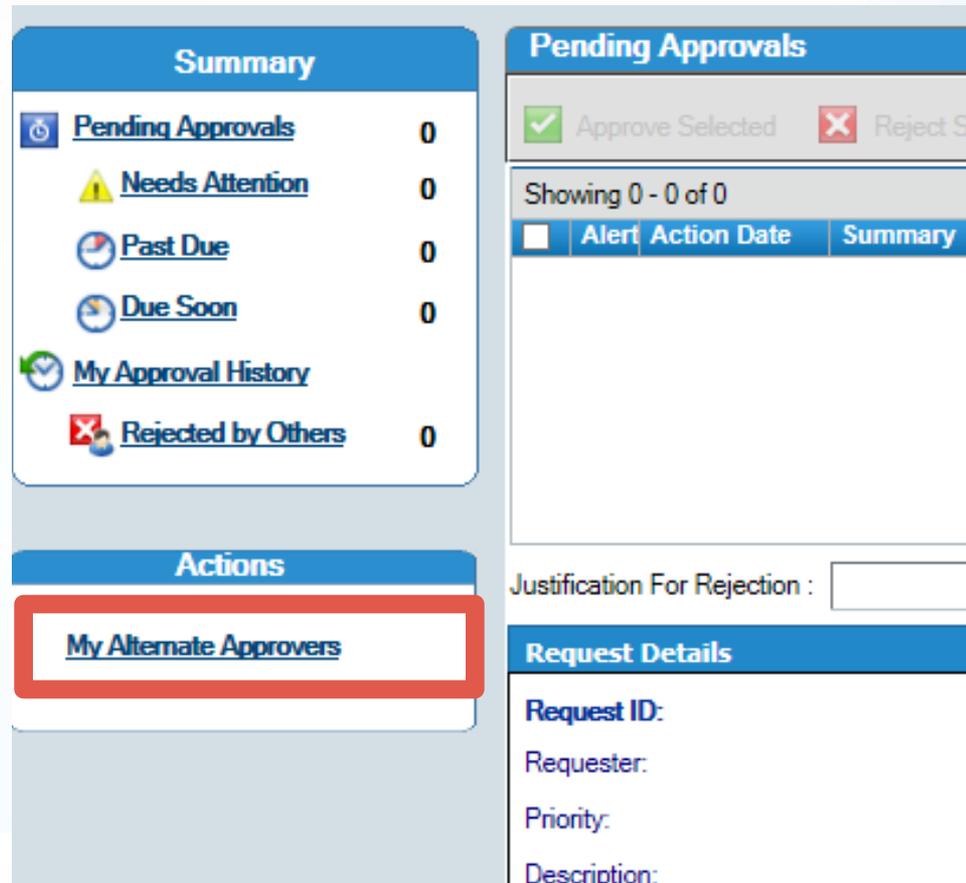
To set up your alternate approver, access Approver Central from the SRM menu bar.



Lesson 3

How to Set Up Alternate Approvers

Next click on My Alternate Approvers, located at the bottom left of the Approval Central screen.



The screenshot displays the 'Approval Central' interface. On the left, a 'Summary' panel shows various approval metrics: Pending Approvals (0), Needs Attention (0), Past Due (0), Due Soon (0), My Approval History, and Rejected by Others (0). Below this is an 'Actions' panel with a red-bordered box around the 'My Alternate Approvers' link. On the right, a 'Pending Approvals' panel shows 'Approve Selected' and 'Reject Selected' buttons, a table with columns for Alert, Action Date, and Summary, and a 'Justification For Rejection' field. At the bottom right, a 'Request Details' panel lists fields for Request ID, Requester, Priority, and Description.

Lesson 3

How to Set Up Alternate Approvers

Search New search New request My Reports Logout Home

AR SYSTEM - Approval Server

Alternate Approver

Alternate Information Administrative Information

Alternate*	<input type="text"/>	▼	Notify Alternate*	<input type="text"/>	▼
For*	carri.stokes	☰	Covering*	<input type="text"/>	▼
Start Date*	<input type="text"/>	📅	Process	<input type="text"/>	▼
End Date*	<input type="text"/>	📅	Process Instance Id	<input type="text"/>	
Assignee Group	<input type="text"/>	▼ ☰	Status	<input type="text"/>	▼

Click on New Request to add a new alternate approver.

Lesson 3

How to Set Up Alternate Approvers

Alternate Approver

Alternate Information Administrative Information

Alternate*	Olga Padilla-Abad		Notify Alternate*	Yes	
For*	carri.stokes		Covering*	All	
Start Date*	1/28/2016 12:00:00 AM		Process		
End Date*	12/27/2016 12:00:00 AM		Process Instance Id		
Assignee Group	Public		Status	Future	

Save Close

Current/Active Alternates

1 entries returned - 1 entries matched Refresh

Alternate	Start Date	End Date	Covering	Process Name
jamie.capps	1/28/2016 12:00:00 AM	12/27/2016 12:00:00 AM	All	

Complete the highlighted fields above including the alternate's name, and the start and end date of the designation, then click Save.