Authorizing Orders

Once an order is submitted by an end user, a manager or supervisor must review and authorize the service from the Order Management module. Order Management module enables you to :

- Track and review all your open and completed requests, including the ones that are submitted on behalf of other people.

- Order for yourself or on behalf of others by copying an unsubmitted requisition.

- Track and review all the authorization requests assigned to your or queues that you have access to.

Note   If Authorizations option does not appear in your Order Management navigation bar, it is because you do not have the privilege to review or authorize service requests.

A service request may require authorization by one or more persons before it can be delivered. A service may also be subject to a review by one or more persons.

- An Authorization task allows the service delivery process to progress to the next task only when the service is authorized. If the service is rejected, the entire delivery process stops and the service is not delivered.

- A Review is an "information only" task. Only when a service is reviewed the service delivery process progresses to the next task. Reviewers cannot reject a service request.

This chapter contains the following sections:

Types of Authorizations and Reviews

Authorization and reviews are required for service request or product to move forward. Lack of authorization by an assigned approver stops the service delivery process. Service requisitions can be subject to two kinds of authorization:

- Departmental Authorization: Business units authorize service/product requests based on need and departmental budget.

- Financial Authorization: Financials group authorizes based on overall company policies and budget. At most sites, the financials authorization is required only for more expensive requests.

Typically, the person from the business unit who authorizes requests is a manager or supervisor.

Adding Information to a Task

Dependent on the system settings, authorization task information may appear in the same browser window or in a separate popup window when clicking the requisition number of a particular task on the Authorization tab. This setting is configured by your application administrator in the Administration module.

Task displayed in a Popup Window

When the authorization task is for a service, the Task Data section appears upon landing the page. You may enter any additional information required for the task, and then click Update to save your changes.

When the authorization task is for a requisition, the Task Details section appears instead:

Task Details	Provides the Task name and the Due On. Due On indicates the date after which this task is late.
Requisition header	Customer and initiator information, status of the requisition, and create/submit dates.
Task Information	Requisition status and key dates for the Review task.
Services in the Requisition	The name the service in the requisition, along with its current status, standard duration, and cost information. Click the service name to view/edit the task data.

Task displayed on Authorization Tab

When the task popup option is disabled, the Services section appears upon landing the page. To view/edit the task data of any of the services included in the authorization task, click the service name within the Services section.

In addition to reviewing or authorizing a task, you can add comments and attachments associated with your approval/review.

Comments and History

The Comments and History section displays the comments of reviewers, authorizers, and performers who work on the service request. It also displays a history of actions, such as automated email and task completions, that are logged by the system.

To add a comment to a requisition:

1 In the page navigator, click **Comments and History**.

2 In the Add Comment field, enter a comment, and then click **Add**.

Your comment will be visible to all users who can view the requisition.

Attachments

The Attachments section enables you to view and attach documents associated with the requisition.

To attach a document to the requisition:

1 In the page navigator, click **Attachments**.

2 Click **Browse** to locate and choose the file you wish to attach to the requisition.

Ad-Hoc Tasks

An Ad-Hoc Task is a one-time task that you create for a service performer or queue. After the Ad-Hoc task is created, it appears in the performer's My Work view if it is assigned to a person, or in the Available Work if assigned to a queue.

To create an Ad-Hoc task:

1 In the page navigator, click **Ad-Hoc Tasks**.

2 Click **Search** next to the Performer box to search for a person or queue.

3 Search for and choose the person or queue you wish to assign to the task.

4 Enter an Expected Duration and any necessary instructions.

5 Check or uncheck the Pause current task until this ad-hoc task completes check box, and then click **Start Ad-Hoc Task**.

Authorizing a Service

Service Group authorizations are performed on a single service. You can view information about the requisition, as well as review information about the particular service.

To approve or reject a service:

Step 1 Choose **Order Management > Authorizations**.

Step 2 Click the requisition number to add any additional Comments and History or file Attachments as necessary to support your approval/rejection. You can also create an Ad-Hoc Tasks.

Step 3 If necessary, review any authorization task information. For more information on viewing and adding information to a task, see Adding Information to a Task.

Step 4 Click **Approve** or **Reject** as appropriate.

To communicate with the requisition customer:

• Click the Customer E-Mail address in the requisition header to open a preaddressed email to the customer in your default email client.

OR

- Use the Comments and History section to enter a comment that will be visible to all users who can view the requisition.

Authorizing a Requisition

Financial authorizations and departmental authorizations enable you to authorize or reject an entire requisition, or individual services within a requisition. To reject one or more services in a requisition:

Step 1 Choose **Order Management > Authorizations**.

Step 2 Click the requisition number to add any additional Comments and History or file Attachments, if necessary, to support your rejection.

Step 3 In the page navigator, click **Task Details**.

Step 4 Check the check boxes next to the services you want to reject.

Step 5 Click **Reject**.

Step 6 Click **Approve Requisition** to approve the remaining services in the requisition.

Approving an Entire Requisition

To approve or reject an entire requisition:

Step 1 Choose **Order Management > Authorizations**.

Step 2 Click the requisition number to add any additional Comments and History or file Attachments, if necessary, to support your rejection.

Step 3 In the page navigator, click **Task Details**.

Step 4 Click **Approve Requisition** or **Reject Requisition** as appropriate.

Reviewing a Service

Service Group Reviews are performed on a single service. To review a service:

Step 1 Choose **Order Management > Authorizations**.

Step 2 Click the requisition number to add any additional Comments and History or file Attachments necessary to support your approval/rejection. You can also create an Ad-Hoc Tasks.

Step 3 In the page navigator, click **Task Details**.

Step 4 Click **Done** to indicate that you have completed your review of the requisition.

Reviewing a Requisition

Departmental Reviews enable you to review all of the services in a requisition. To review a requisition:

Step 1 Choose **Order Management > Authorizations**.

Step 2 Click the requisition number to add any additional Comments and History or file Attachments as necessary to support your approval/rejection. You can also create an Ad-Hoc Tasks.

Step 3 In the page navigator, click **Task Details**.

Step 4 Click **Done** to indicate that you have completed your review of the requisition.