Approvals

Approvals

An approval, via email, by a supervisor or manager can be set up as a policy for infrastructure provisioning requests made by end users. Approvals allows your administrator to give visibility to supervisors and to manage exceptions often needed to meet business policies while automatically provisioning infrastructure. Your administrator can define two approval groups (primary and secondary). Primary or secondary approvers must approve the service request at the first or second level. Your administrator can also specify if approval is required from all users. Once a service request is created, a service request notification email is sent to the approvers. You can view all requests that require your approval, or your service requests that are pending approval from either primary or secondary approvers on the **Approvals** screen. Once the service request is approved, the next step, infrastructure provisioning, is initiated.

The **Approvals** screen displays all approved, pending, and rejected service requests and the following information for each service request:

- Service Request ID
- Request Type
- Initiating User

• Group

• Catalog Name

• Initiator Comments

• Request Time

• My Comments

• My Approval Status

You can view additional details about a service request by clicking the row with the service request and clicking **View Details**.

Permissions Required for Approvals

The following table shows a list of the available approval actions and permissions required:

Task	End User Permissions
Viewing Service Request Details, on page 2	Default
Approving a Service Request, on page 3	Default
Rejecting a Service Request, on page 3	Default
Canceling a Service Request, on page 4	Default
Resubmitting a Service Request, on page 4	Default
Archiving a Service Request, on page 5	Default
Adding Notes to a Service Request, on page 5	Default
Rolling Back a Service Request, on page 5	Default

Viewing Service Request Details

You can view the details for service requests that require your approval. The available service request details depend on the type of service request and parameters defined by your administrator.

Step 1   Choose **Approvals**.

Step 2   Click the row with the service request that you want to view.

Step 3   Click **View Details** to view the following information about the service request:

• Current Status for the Service Request—Displays the progress of the service request and the workflow steps.

- Overview—Includes information such as the Request ID, Request Type, Workflow Name, Workflow Version Label, Request Time, Request Status, and Comments.

- Ownership—Includes information such as Customer Organization and Initiating User.

Approving a Service Request

If you are assigned as an approver for your VDC, pending service requests that require your approval appear on the **Approvals** screen.

Step 1	Choose **Approvals**.
Step 2	Click on the row with the pending service request that you want to approve.
Step 3	Click **Approve**.
Step 4	On the **Service Request** screen, add any necessary comments to the **Comment** field.
Step 5	Click **Approve**.
	On the **Approvals** page, the **Approval Status** for the service request changes to Approved once the service request completes.

Rejecting a Service Request

Rejecting a pending service request in your approval list denies the request, and the request appears in your approval list as rejected.

Step 1	Choose **Approvals**.
Step 2	Click on the row with the pending service request that you want to reject.
Step 3	Click **Reject**.
Step 4	On the **Service Request** screen, add any necessary comments to the **Comment** field.
Step 5	Click **Reject**.
	On the **Approvals** page, the **Approval Status** for the service request changes to Rejected. On the **Service Requests** page, the **Request Status** for the service request changes to Failed.

Canceling a Service Request

You can cancel a pending or approved service request. Canceling the request denies the request and removes it from your approval list. The workflow for a pending approval stops in a failed state at the approval task. You can cancel an approved service request that you may want to resubmit later. If you resubmit a service request for a cancelled request that was previously approved, the workflow starts from the approval task.

Step 1 Choose **Approvals**.

Step 2 Click the row with the service request that you want to cancel.

Step 3 Click **Cancel**.

Step 4 Click **Submit**.
The service request is removed from the **Approvals** page. On the **Service Requests** page, the **Request Status** for the service request changes to Canceled.

Resubmitting a Service Request

You can resubmit a rejected or failed service request. A service request can fail for the following reasons:

- Budget limit (if defined by your administrator) is exceeded for the group under which the VM is being provisioned.

- Resource limits (if defined by your administrator) are exceeded for the group under which the VM is being provisioned.

- Provisioning could fail if relevant information is not provided when creating a service request.

When a service request is resubmitted, you can choose the task in the workflow from which you want to start the service request. For example, if a service request fails in the Resource Allocation workflow, you can resubmit the service request to start from this step.

Step 1 Choose **Approvals**.

Step 2 Click on the row with the service request that you want to resubmit.

Step 3 Click **Resubmit Request**.

Step 4 On the **Resubmit Service Request** screen, choose the task from which you want to start the service request, from the **Resubmit Step** drop-down list.

Step 5 Click **Submit**.
On the **Approvals** page, the **My Approval Status** for the service request changes to Pending.

What to Do Next

On the **Approvals** page, choose and approve the service request.

Archiving a Service Request

You can archive a service request for future use. Archiving a service request removes it from your approval list. Once you archive a service request, contact your administrator if you want to reinstate the service request.

Step 1	Choose **Approvals**.
Step 2	Click the row with the service request that you want to archive.
Step 3	Click **Archive**.
Step 4	On the **Archive Request** screen, click **Archive**. The service request is removed from the **Approvals** page.

Adding Notes to a Service Request

You can add notes to a service request, to provide information for yourself, the requestor, or other approvers.

Step 1	Choose **Approvals**.
Step 2	Click on the row with the service request to which you want to add notes.
Step 3	Click **Add Notes**.
Step 4	On the **Add Notes** screen, add any necessary information to the **Notes** field.
Step 5	Click **Submit**.

Rolling Back a Service Request

You can undo all or part of an executed workflow by rolling back a service request. You can roll back tasks that executed successfully. Exceptions include:

- Some tasks are designed such that they cannot be rolled back.

- Rollback can be disabled for a task within a particular workflow.

Any changes made by tasks that are not selected to be rolled back are not undone. For example, if the task for creating virtual resources is not selected, virtual resources are not removed when the service request is

rolled back. If you choose to roll back an entire successful service request, all of its workflow tasks are rolled back with the exceptions of those that are disabled.

Step 1	Choose **Approvals**.
Step 2	Click on the row with the service request that you want to roll back.
Step 3	Click **Rollback Request**.
Step 4	On the **Rollback Service Request** screen, verify that the tasks you want to roll back are checked. By default, all of the tasks are checked.
Step 5	Click **Submit**. On the **Approvals** page, the **Approval Status** for the service request changes to Pending.

What to Do Next

On the **Approvals** page, choose and approve the service request.