

## APPROVAL MANAGEMENT

### Approval processes are:




- Integrated, Intuitive & Event driven
- Linked SLA's that trigger compliance
- Multi-stage / Multi-branching
- ITIL verified

### Approval Processes

- Approvals are used by some of the ticketing forms in ESS (Requisitions, RFCs, Change Tasks and Problem tickets).
- To use approvals the appropriate settings must be made in the Application Configuration record for that ticket type, appropriate Status and Status Transition values defined, and the Approvals tab and workflow must exist on the ticket form.
- Tickets may have one or many approvals linked to them that can be processed in parallel, or may utilize approval process definitions that chain multiple approvals together in a sequential chain.



### APPROVAL PROCESSES

Mission Statement		
Approvals are used by some of the ticketing forms in ESS (Requisitions, RFCs, Change Tasks and Problem tickets).		
Templates	Success Factor	Performance
 <p>Each Approval Process Template consists of a number of records in the Approval Process form defining the process steps that are linked by the common Process Name value.</p>	 <p>Approval process can be configured to <u>automatically</u> move from one step to another based on values from the ticket the approval is linked to.</p>	 <p>It is possible to link SLA records to Approval processes in order to use the notification and escalation functionality of the SLA process to make sure approvals are completed on time.</p>

# SLAs & Approvals – Emergency Approvals



## SLAs and Approvals

It is possible to link SLA records to Approval processes in order to use the notification and escalation functionality of the SLA process to make sure approvals are completed on time. To specify which SLA to apply to an approval process, choose the SLA name from the menu in the 'Default SLA' field of the approval step.

**Note:** that it is only necessary to specify the SLA to use in the first step of the approval process, unless you wish to change the SLA being used at a particular step.

Not all of the Notification events in a normal SLA designed to be used with tickets are relevant to an Approval process – if you check the 'Approvals SLA' checkbox on the **Notification record**, the events not relevant to the Approval Process will be changed to read-only.

## Emergency Approvals

Emergency Change Approvals use another feature of the "Emergency Change Ticket Approval Process".

Setting the field 'Cancel All Other Approvals' to "Yes" on the Approved step will set any other outstanding approvals linked to the same ticket to a status of "Approval Not Required".

This is used in an emergency approval process where there is not time to complete the normal full approval processes, and the single **Emergency approval overrides all other approval requirements**.

## Interaction between Approvals and Parent Ticket Records

There are various fields on the *Approval Process* form that control interaction between the Approval process step and the ticket the Approval is linked to, as follows:

- ⌚ **'Set Ticket Status'** field – values of No or Yes. If set to “Yes”, the ticket the Approval is linked to will be changed to the Status value selected. Choose a form in the 'Sample Form' field to allow you to choose from available statuses for that form.

Normally the Initial step of an approval process will set the ticket Status to “Awaiting Approval”, and the Rejected step will set the ticket Status to “Cancelled” or its equivalent.

**Note:** The **Approved** step will normally be used to set the ticket Status to “Approved”, but workflow on the ticket form will check for other approvals linked to the ticket, and this change to the ticket Status will only take place if there are no other outstanding approvals.

## Team and Individual Approval Limits

Team Approval limits are defined in the Team Name record for approval groups where the 'Application' field is set to “Approval”. Individual Approval limits are defined in the Team Membership records of members of Approval Teams (where the 'Application' field is set to “Approval”)

## Alternative Approvers

Each Team Member can have an alternative approver defined in their Team Membership record for Approval Groups. If the staff member is a member of more than one approval group, the alternative needs to be defined separately for each approval group and can be a different person in each case.

## Requester not allowed to approve own requests

The Requester of the ticket that an approval is linked to is not allowed to complete the approval, even if they are a member of the correct Approval Group. The approval must be completed by another member of that group.

- **Approval Group for Overall Ticket Approval**
- **Approvals and Tickets in Draft Status**

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