

APPROVING IT SERVICE PORTAL REQUESTS

GENERAL GUIDELINES -

- All requests that require approval will be sent to the approvers via email.
- Only one approval is necessary.
- Approvers can select **approve** or **reject** by clicking on the link within the email notification. Or an approver can go the [IT Service Portal](#) to view all pending approvals.
- The procedural steps outline the process for approving a request via the IT Service Portal or directly through the ServiceNow application. Users will be directed to the appropriate location based on their role.

Need Assistance?

If you require assistance while submitting a request, please contact the ITS help desk at **203.432.9000** or email helpdesk@yale.edu.

Proceed to the [START Retirement Crosswalk](#) page to find a listing of the previous START requests, where they moved to and when applicable, the new form links within the IT Service Portal.

APPROVING THE REQUEST VIA EMAIL NOTIFICATION

1. Approver receives and email indicating a request was submitted that requires approval.



2. Click one of the following links:

- **Click here to view Approval Request and other approvers Link** – You are brought to the IT Service Portal, proceed to [Approving the Request VIA IT Service Portal](#) section for further instructions.
- **Click here to view Requested Item: LINK** - You are brought to the IT Service Portal, proceed to [Approving the Request VIA IT Service Portal](#) section for further instructions.

When a request is rejected, the requester will receive the following:



The screenshot shows an email notification from the IT Service Desk. The header includes the sender 'IT Service Desk' and the recipient 'to me'. The time is '8:48 AM (2 minutes ago)'. The main body of the email features the Yale Information Technology Services logo and a short description: 'Add or remove users to ServiceNow'. It provides two links: 'Click here to view Approval Request: LINK' and 'Click here to view Requested Item: LINK'. Below this, the priority is listed as '4 - Normal', and the category is 'Comments:'. A section titled 'The following comments were given by Approver: Claire' is followed by a list of comments. The first comment, dated '2017-06-16 08:47:33 EDT - Claire', states 'Test approval rejection'. The second comment, dated '2017-06-15 10:44:55 EDT - Claire', is a 'test note from the portal' from 'Information Technology Services, Yale University'.

APPROVING THE REQUEST VIA IT SERVICE PORTAL

1. Click the [IT Service Portal Link](#) and the *Yale IT Service Portal* screen displays.

The screenshot shows the Yale IT Service Portal interface. At the top, there are navigation tabs: 'YALE ITS', 'SERVICES & REQUESTS', and 'HELP DESK'. Below these, the user's name 'PATRICIA BROUSSEAU' is displayed. The main header area contains 'Yale IT Service Portal', 'APPROVALS 0' (highlighted with a red box), and 'MY TICKETS 0'. The main content area has a heading 'Manage Your Tickets and Requests in the Yale IT Service Portal' and a welcome message. Two main action boxes are visible: 'START Crosswalk' and 'ITS Service Catalog', each with a corresponding button.

2. Click **APPROVALS > View All Approvals**. A screen displays, listing all request(s) that require approvals in the **MY APPROVALS** section.

The screenshot shows the 'MY APPROVALS' section. A request titled 'RITM0212541 - Express Shipping' is listed with the requestor 'Claire'. Below the request title, there are links for 'Request Details' and 'Requester'. To the right of the request, there are two buttons: 'Approve' (highlighted with a red box) and 'Reject' (highlighted with a red box). The request details include 'Requested By: Claire', 'Ordering For: Myself', and 'Supervisory Organization: Campus Community Technologies - ITS Service Management (di M)'. The 'Request Type' is 'Add' and 'Previously Excluded' is 'true'.

The screenshot shows the 'APPROVAL HISTORY' section. It lists three requests with their status:

- RITM0212530 - Ethernet Request: Rejected (red box)
- RITM0212528 - Cell Phone Request: Approved (green box)
- RITM0212513 - Cell Phone Request: Approved (green box)

 Each request entry includes the request ID, title, requestor name, and a link to 'Request Details'. The 'Cell Phone Request' entries also show a price of \$77.00 and \$546.99 respectively.

NOTE - Requests that have been approved or rejected display in the **APPROVAL HISTORY** section. When a request is approved by someone other than yourself, you will see orange box that states **Completed by another approver** (someone within the approval group).

3. Click request link to view additional information and the following screen displays.

APPROVAL REQUEST FOR REQUESTED ITEM RITM0212524

Generate Pin
Opened by Claire [redacted]

^ Request Details

Requested By
 Claire [redacted]

Ordering For
 Single User

Requested For
 Claire [redacted]

NetID
 cl [redacted]

Email
 claire.l [redacted]@yale.edu

Phone
 +1 (2 [redacted])

Supervisory Organization
 Office of the CIO - Vendor Management ([redacted])

Requested Start Date
 2017-06-22

Business Reason
 test

By checking this box, you are stating that you have confirmed the person requesting a PIN is the rightful owner of the NETID the PIN is being used for.

true

THIS REQUESTED ITEM REQUIRES YOUR APPROVAL

State
 Requested
 Created
 3h ago

Approve
Reject

APPROVER ACTIONS

Correct COA

ACTIVITY STREAM 📎

Type your message here... Send

S

System
 ⌚ 3h ago
 Created

Start

NOTE - You can also click the Request Details link to view the additional details and click the **Approve** or **Reject** box.

4. Review the request, including the COA (when applicable).
5. Is the COA correct? **NOTE** – Not all requests will require a COA.
 - **YES** – Proceed to step #6
 - **NO** –
 - i. Click the **Correct COA** box. The *Correct COA* screen displays.



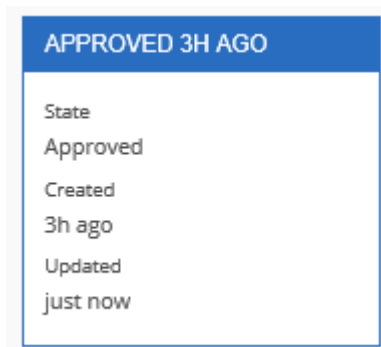
- ii. Select the appropriate **COA Type** from the drop-down list. The **New COA** field will display.



- iii. Input the **NEW COA**.
- iv. Input **Comments** indicating why the COA was corrected.
- v. Click **Submit**.

6. Click one of the following boxes:

- **Approve** – The approve and reject box changes to the following:



- **Reject** –
 - i. The *Rejection Comment* screen displays.

Rejection Comment

Explain why this request is being rejected.

Cancel OK

- ii. Input the reason for rejection in the **Explain why this request is being rejected** field.
- iii. Click **OK**.