

# CA Automation Suite for Clouds

## Approving Manager Guide

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## CA Technologies Product References

This documentation set references the following CA Technologies products and components:

- CA Service Catalog
- CA Process Automation
- CA Embedded Entitlements Manager (CA EEM)
- CA Business Intelligence
- CA Server Automation
- CA IT Client Manager

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# Chapter 1: Introduction

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This guide describes Approving Manager responsibilities. The Approving Manager is required to:

- Monitor and manage the reservation requests
- Approve or reject requests
- Access and run reports
- Review reservation requests





# Chapter 2: Monitor and Manage Reservation Requests

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This chapter describes the Approving Managers tasks to manage reservation requests from Service Consumers. As an Approving Manager, you approve or reject requests for virtual resources from Service Consumers.

To understand how requests affect business requirements and priorities, you review reservation requests for yourself and other Approving Managers. You also can generate reports of the resource usage and availability, which are useful for verifying Service Level Agreements.

The Self-Service Portal allows you to monitor and manage reservation requests.

## Approve or Reject Requests

As an Approving Manager, you are responsible for reviewing the requests that you receive from a Service Consumer. A request is automatically assigned to you based on the user that opened the reservation. Requests automatically appear in the portal as Requests Pending My Action. You can view all requests and can approve or reject the requests.

You can perform other tasks on reservations such as transfer or delegate requests. For more information, click Help and see the topics under Handle Requests Pending Action.

### Follow these steps:

1. Log in to CA Service Catalog.
2. Click Requests.  
The Available Services list appears.
3. Click Pending, in the Request Lookup section.  
The requests that await review and approval or rejection appear.
4. Click Actions for a request, then click Approve/Reject.  
The Approve Request page opens.
5. Click Show Details and review the reservation details.
6. Select Approved or Rejected from the Item Status drop-down list.

7. Click Save.

A confirmation dialog appears.

8. Click Yes.

The Request Details page opens showing the updated status of the request.

After you approve the application request, CA Automation Suite for Clouds fulfills the request. The Service Consumer who opened the reservation request receives an email notification.

## Access and Run Reports

Reports can assist with request approvals by giving you a picture of resource usage and availability. You also can generate service accounting reports and query data within a range to generate reports for stakeholders or verify the compliance with Service Level Agreements.

You can run available reports from InfoView directly from CA Service Catalog.

### Follow these steps:

1. Log in to CA Service Catalog.
2. Click Administration, Report Builder, InfoView.  
The BusinessObjects InfoView page opens.
3. Click Document List and navigate to Public Folders, CA Reports, CA SLCM.

The CA SLCM folder contains two folders:

#### Admin Reports

Provides reports of interest to Approving Managers and Service Providers.

#### User Reports

Provides reports of interest to service consumers, such as the User Requests report. This report provides details about requests that were opened, approved, or fulfilled within specific time periods.

**Note:** Your access to folders and reports depends on your access privileges.

4. Double-click a report.  
The Prompt dialog opens.
5. Type specific parameters to generate the report.
6. Click Run Query.  
The report generates and opens.

## Review Reservation Requests

As an Approving Manager, understand how requests affect business requirements and business priorities. Understand the options available to process requests and what users are requesting. By reviewing the requests that service consumers generate, you can understand better the business requirements and business priorities.

Reviewing the reservation requests also helps you to create effective policies for automatically assigning tasks in the request lifecycle to users. Policies are commonly used to expedite requests and assign a specific approver to a specific service or service option. You can also assign approval or rejection duties to users other than the manager of the requester.

### **Follow these steps:**

1. Log in to CA Service Catalog.
2. Click Requests.
3. In the Request Lookup pane, select one of the following options:
  - Open to review all outstanding requests for approving managers.
  - Completed to review recently processed requests.
  - Pending to review requests that you are responsible for processing or delegating.
4. Review requests with the on-screen navigation options.
5. (Optional) Click Home to return to the CA Service Catalog home page.

You can view requests pending action for all approving managers.