Oracle Software Configuration Service Request & Approval Stepper

This stepper will provide instructions on how to enter an Oracle Software Configuration service request and how to complete the associated approval processes.

How to enter a Service Request

District users can enter a software configuration service request for the Oracle system. These requests will be reviewed and clarified by a designated District Information Technology resource. Upon finalization of the request, the designated District Information Technology resource will submit the service request for approval to the Chief of the identified corresponding area.

Only designated District leaders will create and assign Tasks to technicians.

Accessing the Service Request Form

- 1. To create an Oracle Software Configuration Service Request, click on the I.T. Help Desk icon on your employee portal using your single sign-on.
- 2. From the left navigation menu, click on *Request a Service*.
- 3. From the listed categories, click on *Employee Portal Applications*.





4. This will display a listing of available service request forms. Click on the *Oracle Software Configuration Change* request form.

Categories > Employee Portal Applications Categories Categories	Serv	rice Requests
Categories	Categor	ies > Employee Portal Applications
Oracle Software Configuration Change Please complete this form to request an Oracle ERP/HCM software configuration change.	Categor	ies 🔻
· · · · · · · · · · · · · · · · · · ·	*	Oracle Software Configuration Change Please complete this form to request an Oracle ERP/HCM software configuration change.

Entering the Service Request Form

- 1. The form will display with your email and name listed as the requestor.
- 2. Customer Contact Information fields: the Current Location field is required. Contact Phone Number and CC: Email are optional.

Service Request			
Gracle So	ftware Configuration Change		
Please comp	lete this form to request an Oracle ERP/HCM softwa	are configuration change.	
Request for Edit / Self			
Email	sc	Requested By	St
Customer Contact Contact Phone Number Current Location (Regu CC Email	: Information ; ivea)		
		Submit Cancel	

- 3. Moving down in the form is the Service Request Details section.
- 4. Select the appropriate Oracle Module, please note initially only the ERP module will be available. The HCM module will be added when appropriate.
- 5. Select the appropriate ERP or HCM area from the available drop down value listing.
- 6. The Configuration Request Details section is a free form text field and it is in this field that you will document all of the details for your request.
- 7. If applicable you can add attachments
- 8. Click *Submit* when all details have been recorded.

rvice Request	Please select an ERP Area (Required)
Oracle Software Configuration Change	✓None Fixed Assets Inventory
Service Request Details Please select an Oracle Module (Required)	Accounting Cash Management
ERP v	Procurement Budget
Please select an ERP Area (Requires) -None- V	Contracts
Configuration Request Details (Required)	
Attachments	
Add Attachments	
Submit Cano	el

Oracle Software Configuration Request Processing

- 1. All Oracle Software Configuration service requests will be reviewed and sent to the appropriate Chief for approval.
- 2. You may be contacted to provide additional information during the initial review and approval process.
- 3. Once the service request has been approved, configuration changes will be completed.
- 4. Upon completion of the configuration changes, the Requestor will be notified to complete user testing regarding the requested change.
- 5. The Requestor will need to provide a system approval ensuring the changes were implemented correctly.
- 6. The Service Request Approval Stepper explains the approval process.

Approval Process

Some I.T. Help Desk ticketing system Service Requests may require one or multiple approval levels. This stepper provides the system steps required to approve or reject a service request.

- Not all Service Requests will require an approval.
- Some Service Requests may require an approval by a designated District leader before any development or action can be taken on the request.
- Some Service Requests may require the Customer to provide an approval, after they have completed system testing to confirm the request was completed accurately.
- Anyone designated as an approver for a Service Request will receive an email notification when an approval is required, which will include a link to the systems approval page.

Approver Roles

There are currently two different approval levels identified in the system.

Level 1 Approver: This level is normally designated for a District leader who will need to review the Service Request and determine whether the request should be approved or rejected. Work associated with the Service Request will not begin unless the Service Request receives a Level 1 approval status.

Level 2 Approver: This level is normally designated for the Customer who has requested the Service Request. The Service Request will contain instructions for the Customer as to what actions need to be taken, in most cases it would be for them to test/validate the request has been completed accurately.

<u>NOTE:</u> While the Service Request is "pending approval" from the Level 1 or Level 2 designated approver, the Service Request is "locked" and no additional changes or updates can be made.

After reviewing the Service Request or completing the requested testing the approver can either Approve or Reject the request. When approving or rejecting the service request, the approver has the ability to add a comment pertaining to the Approval or Rejection action.

For example: The Level 2 approver could reject the request and state that testing of the requested change failed and provide details of how it failed the testing. The technician can then review the change, fix the issue and re-send back to the Level 2 approver to re-test and approve/reject.

Approval - Email Notification

The assigned technician will determine when a Service Request needs to be sent for approval. The designated approver will receive an email advising a service request has been submitted that requires their action/approval. The email will also contain a link which will direct the approver to the Self-Service portal to the "Manage Approvals" screen where they can review the request details and either approve or reject the request. An additional link to this stepper will also be provided for reference if needed.

	for Service Request #00074212 Inbox ×
•	Za 2:13 PM (11 minutes ago) ☆ ↔ : to me ◄ A Oracle Software Configuration Change Service Request has been submitted that requires your action/approval.
	YOU MUST CLICK THE FOLLOWING LINK TO REVIEW THE SERVICE REQUEST DETAILS AND APPROVE OR REJECT THE REQUES' Service Request 00074212 If you need more instruction on how to navigate the approval screens you can access the Service Request Approval Stepper HERE.
	If you feel you have received this email in error, please contact the IT Help Desk.

Self-Service Portal Approval Screen

Clicking the link from the Service Request Approval email notification will bring the approver to the following system screen and list any pending approvals.

	Submit a Ticket	>	Pending Approvals
١.	View Self Help Articles	>	Today ▼ 00074269 Service Request
			1:25 PM Submitter Adam McNamee Assigned To Zain Khan Date Submitted 01/30/2024
	Looking for existing tickets and requests? View in My Activity		Reassign Approve / Reject Approval History Show Record

The approver can also access any Service Requests pending their approval by going directly to the I.T. Help Desk Self-Service Portal and clicking on the "Manage Approvals" section.

Each Service Request requiring approval will be listed. The designated approver can view more details pertaining to each Service Request by

IT Help Desk

clicking on the "Show Details" or "Show Record" buttons. This will display all viewable data fields associated with the Service Request.

=	Submit a Ticket	>	Pending Approvals Hor	ne >
8	Request a Service	>	Internet Clear All Select All Ression Annue / Reject	_
Ç	View Self Help Articles	>		
•	Manage Approvals	>	10.43 AM Submitter Adam McNamee	
6	View My Assets	>	Assigned To Sharon Connelly Date Submitted 01/31/2024 Show Details]
	Looking for existing tickets		Reassign Approve / Reject Approval Histor Show Record	

<u>NOTE</u>: All request details will be documented in the Description Field of the request.

Request	a Service	>	61 31/2024				Select All		Approve / Reject
View Sel	Approvals	>	<u>r</u> è	00074276 Se	ervice Req	luest			
View My	Assets	>	10.43 AM	Assigned To Date Submitted	Sharon (01/31/20	Connelly 124			Hide Details
Looking an	for existing tickets d requests?			Description Opened Date Client Name Category Account	Configur 1/31/202 Sharon O ERP Fin IT Staff	ation Request I 94 10:23 AM Connelly ance	Details: test 1/3	1/24	
View	in My Activity		Reassign Approve / F	Reject App	roval History	Show Record	1		

After reviewing the description of the service request, the approver can click on the "Approve / Reject" button located directly under the Service Request, or the approver can "check" the selected Service Request(s), which will then activate the orange "Approve / Reject" button located on the top right of the screen that can be clicked.

	Submit a Ticket	>	Pending Approvals	Home >
 <th>Request a Service View Self Help Articles</th><th>></th><th>Clear All Select All Reassign</th><th>Approve / Reject</th>	Request a Service View Self Help Articles	>	Clear All Select All Reassign	Approve / Reject
0	Manage Approvals	>	10.43 AM 0074276 Service Request	
Ø	View My Assets	>	Assigned To Sharon Connelly Date Submitted 01/31/2024	Show Details
	Looking for existing tickets and requests?		Reassign Approve / Reject upproval History Show Record	

After clicking either of the "Approve/Reject" buttons, a pop up window will display providing the approver the option to select either "Approve" or "Reject". A comment field is available, but not required, it is suggested that a comment be provided whenever a request has been rejected, to provide the technician appropriate details.

Approval Request: 00074276								
Add Note								
Comment				4				
	Cancel	Approve	Reject					

Once the approver has approved or rejected a Service Request the request will no longer be visible on the "Manage Approvals" screen. The technician will receive email notification that the service request has either been approved or rejected.

Recalling an Approval Request

There may be instances where a designated approver receives an email notification to approve a specific service request, however before the approver actually approves or rejects the request, the technician determines additional work/details need to be added to the request. The technician can "Recall" the request, make the necessary updates and resubmit for approval. The approver will receive an email notification advising the request has been recalled and no action is required at this time. The approver will no longer be able to access the approval screens for the recalled item. A new email notification will be sent to the approver, when the request has been re-submitted for approval, providing access to the request again.



Service Request Completed

The customer who requested the service request will receive an email notification when all tasks associated with the request have been completed and the technician has closed the request.