HP Propel

Software Version: 2.00
CentOS Operating System

Policies Help

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Contents

Policies

Concepts

An HP Propel policy controls the approval requirements for orders placed by consumers in the HP Propel Portal.

The HP Propel administrator uses the **Policies** application to manage approval policies.

There are three policy types in HP Propel:

- "User Context" below

- "Named" below

- "Group" below

User Context

The approver is a manager of an HP Propel consumer that ordered the service. The **Level** property specifies how many managers are involved in the approval process. For example, if the **Level** is set to 2, two levels of managers must approve the order. Managers are asked for approval in successive steps. All required managers must approve an order. (One denial results in a rejection of the order.)

Group

The approver is an LDAP group of users that can collectively approve an order for catalog items by an HP Propel consumer. You can specify an LDAP group for the approval group. All users in the specified group are asked for approval and the following properties affect the approval process:

- The **Minimum required approvals** property specifies how many approvals are enough to authorize an order. If set to 0, all members in the group must approve the order.

- The **Minimum denials** property specifies how many denials result in rejection of the order. If set to 0, this property is ignored.

Named

The approver is a group of users that can collectively approve an order for catalog items by an HP Propel consumer. You can add individual users to the approval group. All users in the specified group are asked for approval and the following properties affect the approval process:

- The **Minimum required approvals** property specifies how many approvals are enough to authorize an order. If set to 0, all members in the group must approve the order.

- The **Minimum denials** property specifies how many denials result in rejection of the order. If set to 0, this property is ignored.

Tasks

Available tasks:

- "View Policy Details" below

- "Create Policy" on the next page

- "Edit Policy Details" on page 8

- "Delete Policy" on page 9

View Policy Details

Concepts

An HP Propel policy controls the approval requirements for orders placed by consumers in the HP Propel Portal.

The HP Propel administrator can view policies in HP Propel.

Tasks

To view the details of a policy:

1. From the Launchpad in HP Propel, click the **Policies** application. The **Policies** view is displayed.

2. To search the list of policies that are displayed in the **Policies** view, type the search criteria in the **Search Policies** field. Only the policies that meet the search criteria are displayed.

3. To view the details of a policy, click the policy in the main list. The details of the policy are displayed, including **Name**, **Description**, **Type**, **Approvers**, **Minimum required approvals**, **Minimum denials**, and **Decide Automatically** properties.

Related Tasks

- "Create Policy" below – Instructions to create a new policy.

- "Edit Policy Details" on the next page – Instructions to edit a policy's properties.

- "Delete Policy" on page 9 – Instructions to delete a policy.

Create Policy

Concepts

An HP Propel policy controls the approval requirements for orders placed by consumers in the HP Propel Portal.

The HP Propel administrator can create new policies in HP Propel.

Tasks

To create a new policy:

1. From the Launchpad in HP Propel, click the **Policies** application. The **Policies** view is displayed.

2. In the **Policies** view, click **Create Policy**.

3. In the **New Approval Policy** dialog, fill in and select the necessary fields in the **New Policy** dialog:

    a. Select the new policy **Type**. For details of the policy types, see "Policies" on page 5.

    b. Type a **Name** for the new category.

    c. Type a **Description** for the new policy.

4. Click **Create Policy** in the **New Approval Policy** dialog to finish and save your changes.

The new policy and its properties are displayed. To edit additional properties of the new policy, see "Edit Policy Details" on the next page.

Related Tasks

- – Instructions to edit a policy's properties.

- – Instructions to delete a policy.

- – Instructions to view a policy's properties.

Edit Policy Details

Concepts

An HP Propel policy controls the approval requirements for orders placed by consumers in the HP Propel Portal.

The HP Propel administrator can edit the properties of a policy in HP Propel.

Tasks

To edit the properties of a policy:

1. From the Launchpad in HP Propel, click the **Policies** application. The **Policies** view is displayed.

2. In the **Policies** view, click the policy you want to edit.

3. In the **Details** view, click **Edit**.

4. In the **Details** dialog, make your changes. You can revise the following properties:
   - Type a new **Name**.

   - Type a new **Description**.

   - Add an approver by clicking **Add approver**.

   - Select the **Level** that is required for approval. This property specifies how many managers are involved in the approval process. It is applicable to only user-context policies.

   - Select the **Minimum required approvals**. This property specifies how many approvals are enough to authorize an order. If set to 0, all members in the group must approve the order. It is only applicable to group and named policy types.

- Select the **Minimum denials**. This property specifies how many denials result in rejection of the order. If set to 0, this property is ignored. It is only applicable to group and named policy types.

- Select whether to **Decide automatically**.

5. To finish and save your changes, click **Save**.

The revised properties for the policy are displayed in the **Details** view.

Tip: For details of the types of policies, see "Policies" on page 5.

Related Tasks

- "Create Policy" on page 7 – Instructions to create a new policy.

- "Delete Policy" below – Instructions to delete a policy.

- "View Policy Details" on page 6 – Instructions to view a policy's properties.

Delete Policy

Concepts

An HP Propel policy controls the approval requirements for orders placed by consumers in the HP Propel Portal.

The HP Propel administrator can delete policies in HP Propel.

Tasks

To delete a policy:

1. From the Launchpad in HP Propel, click the **Policies** application. The **Policies** view is displayed.

2. In the **Policies** view, for the policy you want to delete, click ⋮ and select **Remove**. A confirmation dialog to delete the policy is displayed.

3. Confirm the policy deletion.

The policy is deleted from HP Propel.

Related Tasks

- "Create Policy" on page 7 – Instructions to delete a policy.

- "Edit Policy Details" on page 8 – Instructions to edit a policy's properties.

- "View Policy Details" on page 6 – Instructions to view a policy's properties.

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