# HP Propel

Software version 2.10

# Policies Help

Documentation release date: December 2015

Software release date: December 2015

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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
- "Group" below
- "Named" on the next page

## User Context

The approver is a manager of an HP Propel consumer that ordered the service. The **Number of levels** property specifies how many managers are involved in the approval process. For example, if the **Number of levels** 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 **Minimal 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 **Minimal 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 **Minimal 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 **Minimal Denials** property specifies how many denials result in rejection of the order. If set to 0, this property is ignored.

For all policy types, if **Automatic Approval** is selected, its fields are used as follows: if the wait time for an order is exceeded, then the automatic response (approved or denied) is executed.

After an approval policy is created, it can be applied to an HP Propel catalog or catalog item. When applying an approval policy to a catalog, all catalog items in the catalog have the approval policy; however, the HP Propel administrator can assign different approval policies to various catalog items in a catalog. Refer to the *Catalogs* and *Catalog Items* online help for more information about applying approval policies.

## Tasks

Available tasks:

- "View Policy Details" below
- "Create Policy" on the next page
- "Edit Policy Details" on page 7
- "Delete Policy" on page 8

> **Tip:** Click here for the latest English version of the HP Propel Policies Help, and enter your HP Passport credentials (user ID and password). Alternatively, go to the HP Software Support site at https://softwaresupport.hp.com/group/softwaresupport. Enter your HP Passport credentials and then click **Sign In**. Enter **Propel Policies Help** in the search text box. In the results section, select the help PDF you are interested in that has the most recent date.

## 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**, **Type**, and **Policy Attributes**, which can include the **Number of levels**, **Minimal Approvals**, **Minimal Denials**, **Approvers**, and **Automatic Approval** 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 8 – 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 4.

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

   c. Depending on the new type of policy:
      - For a new *Named* or *Group* policy type, enter values for the **Minimal Approvals** and **Minimal Denials** fields, and select the list of **Approvers**. The **Minimal Approvals** property specifies how many approvals are enough to authorize an order. If set to 0, all approvers must approve the order. The **Minimal Denials** property specifies how many denials result in rejection of the order. If set to 0, this property is ignored

- For a new *User Context* policy type, enter a value for the **Number of levels** field, which indicates the number of managerial levels needed for approval.

  d. If **Automatic Approval** is specified, then the number of days must be entered in **Wait Time for Automatic Approval** and an **Automatic Response** must be selected. The rules for the **Automatic Approval** fields are: if the wait time for an order is exceeded, then the automatic response (approved or denied) is executed.

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

The new policy and its properties are displayed.

## 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. Depending on the type of policy, you can revise the following properties:
   - Type a new **Name** for the policy.

   - For *User Context* types of policies, you can change the **Number of levels**, which is the number of managerial levels needed for approval.

   - For *Named* and *Group* types of policies, you can enter values for the **Minimal Approvals** and **Minimal Denials** fields, and select the list of **Approvers**. The **Minimal Approvals** property specifies how many approvals are enough to authorize an order. If set to 0, all approvers must approve the order. The **Minimal Denials** property specifies how many denials result in rejection of the order. If set to 0, this property is ignored.

- If **Automatic Approval** is selected, then the number of days must be entered in **Wait Time for Automatic Approval** and an **Automatic Response** must be selected. If the wait time for an order is exceeded, then the automatic response (approved or denied) is executed.

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 4.

## Related Tasks

- "Create Policy" on page 6 – Instructions to create a new policy.
- "Delete Policy" below – Instructions to delete a policy.
- "View Policy Details" on page 5 – 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 6 – Instructions to delete a policy.
- "Edit Policy Details" on the previous page – Instructions to edit a policy's properties.
- "View Policy Details" on page 5 – Instructions to view a policy's properties.

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