

Approving, Rejecting, Editing from your “APPROVAL NEEDED” Email

When you are assigned an “Approver” role by a Funding Change Request Submitter you will receive an email like the one below. The email has two links. Each link will take you to a different place in the Funding Change Request

- 1.The first link takes you to where you can access the Approve/Reject buttons
- 2.The second link takes you to where you can review and edit the Funding Change

This job aid will cover each link separately starting on the next page.

Subject: CSS HR/APS Request APPROVAL NEEDED - [Subject] (Case [Number])

Body:

Hello,

A request has been routed to you by [Submitter] for approval. Please review the request details in ServiceNow and provide your decision as soon as possible so we can begin working on the request.

Approvals must be entered directly into ServiceNow. To view the case to do this as well as add additional comments, use the links below:

Click here to view Approval Request: LINK ([Link 1](#))

Click here to view or edit HR Case : LINK ([Link 2](#))

APPROVALS

Approver 1: [Approver 1] ([Approver 1 name will be here](#))

Approver 2: [Approver 2] ([Approver 2 name will be here](#))

Please note: If you "reply" to this email and type your "approval", it does not register.

If you have any questions, please call us at [510-664-9000](tel:510-664-9000), option 3. We are happy to help.

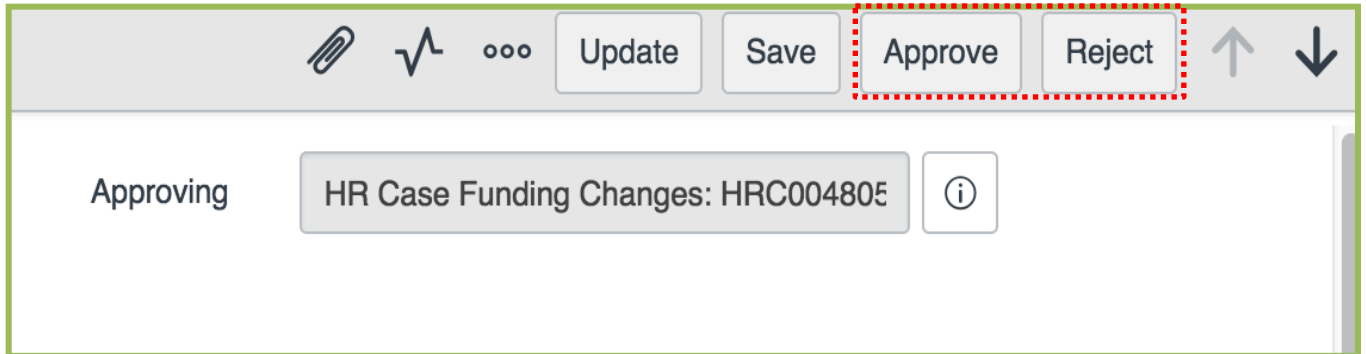
Thank you,

Campus Shared Services Human Resources/Academic Personnel Support (CSS HR/APS)

ServiceNow for CSS HR/APS

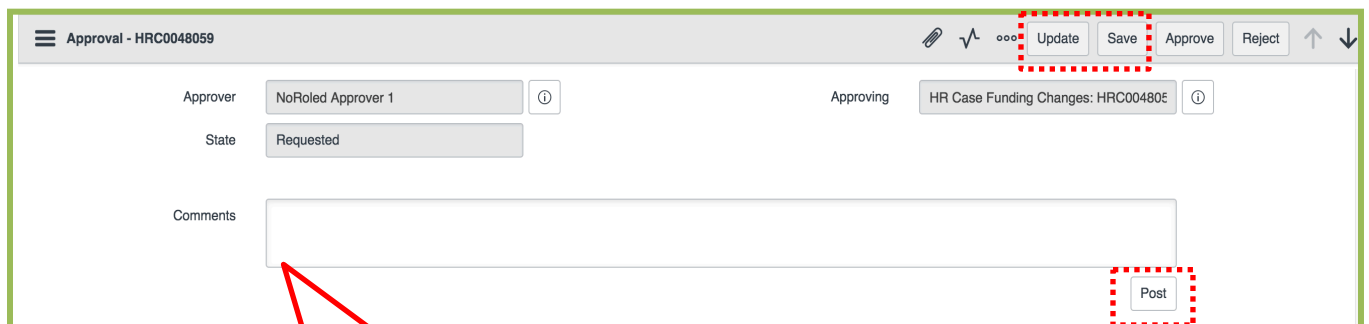
Approving from your Home Page
(continued)

Link 1 will open the case with a summary review and the action buttons. You may Approve or Reject the case by clicking on the appropriate button located in the upper right section of the window. A picture of the buttons is below.



The screenshot shows the top navigation bar with icons for attachments, a line graph, and a menu. Below these are buttons for 'Update', 'Save', 'Approve', and 'Reject'. The 'Approve' and 'Reject' buttons are highlighted with a red dashed box. Below the navigation bar, the case summary section shows the word 'Approving' and a box containing 'HR Case Funding Changes: HRC004805' with an information icon.

You may also communicate back to the case submitter (and Approver 1 if you are Approver 2) by adding text to the **Comments** text field and click the **Post**, then **Save**, or **Update** button. An email will be sent to the request submitter (or Approver 1 if you are Approver 2) indicating you have posted a comment in the case. The submitter can open the case, read your comments, and take appropriate action.



The screenshot shows the case details section for 'Approval - HRC0048059'. It includes fields for 'Approver' (NoRole Approver 1), 'State' (Requested), and 'Comments'. The 'Comments' field is a large text area. Below the 'Comments' field is a 'Post' button, which is highlighted with a red dashed box. The top navigation bar also shows 'Update', 'Save', 'Approve', and 'Reject' buttons, with 'Update' and 'Save' highlighted by a red dashed box.

The Comments box allows individuals (and CSS) to communicate back and forth with each other within the case.

Be sure to press the Update or Save button before logging out of ServiceNow to save any actions, or comments added to the case.

Review/Edit an EDC

Link 2 will open the HR Case Funding Changes widow.

To review/edit an EDC:

Scroll down to the **Funding Changes** section of the window (pictured below, several sections down). If this is a EDC for an individual with up to 8 chartstrings, you can review the:

- Start/End Dates
- New Chartstring
- Distribution %
- Budgeted FTE
- Earnings Code
- Friendly Name (if there is a Friendly Name) for accuracy.

Note: for certain requests such as

- An EDC with more than 8 chartstrings
- A request to change chartstrings for multiple employees
- A request that contains both an EDC and PET instructions

Check the attachments section of the case to review the appropriate documentation.

Funding Changes

PET Priority

Not Applicable

Funding Change Type

Earnings Distribution Change Only

Number of Lines

Record Number

0

PAN Confirmation Emails

-

+

Reflect Change in Position Management

Yes

Position Number

123456

Update

Save

Earnings Distribution Details

Go to

Start Date

Search

1 to 1 of 1

HR Funding Items

	Start Date	End Date	New Chartstring	Distribution %	Budgeted FTE	Earn Code	Friendly Name
	2016-12-08		1-51231-07427-10004-72	49		REG	

Actions on selected rows...

1 to 1 of 1

If you have no changes and want to Approve or Reject the case, click the back arrow to return to the previous window and click the appropriate button.

ServiceNow for CSS HR/APS

Reviewing and Editing an EDC (continued)

If you wish to make changes to any of this data, click on the date in the Start Date column. Clicking the date will take you to the **HR Funding Items** window (screenshot on next page) where you can make edits.

Funding Changes

PET Priority

Not Applicable

Funding Change Type

Earnings Distribution Change Only

Number of Lines

Record Number

0

PAN Confirmation Emails

-

+

Reflect Change in Position Management

Yes

Position Number

123456

Update Save

Earnings Distribution Details

Go to

Start Date

Search

1

to 1 of 1

	HR Funding Items						
	Start Date	End Date	New Chartstring	Distribution %	Budgeted FTE	Earn Code	Friendly Name
<input type="checkbox"/>	<div><div>2016-12-08</div></div>		1-51231-07427-10004-72	49		REG	
<input type="checkbox"/>	Actions on selected rows...						

1

to 1 of 1

Continued on
next page

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Reviewing and Editing an EDC (continued)

You may make edits in this window to **Dates, Distribution %, Budgeted FTE, Friendly Name, New Chartstring, and Earn Code** fields by clicking directly into the field and editing.

After you have made edits click on the **Update** button to save your work and return to the previous window.

HR Funding Items - HRFI0001626

Number: HRFI0001626

Start Date: 2016-11-01

End Date: 2017-12-31

Distribution %: 100

Budgeted FTE:

Friendly Name:

* HR Case Funding Changes: HRC0048063

New Chartstring: 1-51210-69799-32477-72-AZ_SVN-

Earn Code: REG

Activity: Lyle Hendricksen (2016-10-25 09:24:01)

Update Save

Next, scroll down to the *Additional comments* field in the *Notes* section and document why you made the edits to the EDC Request (if you made edits).

Notes

Additional comments

Post

Click on the **Update** button located in the upper right corner of the window to save your work and return to the Window containing the Approve/Reject buttons. You may approve, reject the request at this time or log out of Service now if you want to take action later.

Review/Edit a PET

Link 2 will open the HR Case Funding Changes widow.

To Review/Edit a PET scroll down to the **Funding Changes** section of the window (pictured below, several sections down). You can review the:

- PET Priority
- Number of Lines
- PAN Confirmation Emails

Funding Changes

PET Priority

90 Day Deadline

Number of Lines

25

PAN Confirmation Emails

– +

can put SPA account here

If you have no changes and want to Approve or Reject the case, click the back arrow to return to the previous window and click the appropriate button.

ServiceNow for CSS HR/APS

Reviewing and Editing a PET (continued)

If you wish to review the detail in the Excel PET form and make changes to any of the data, click on the PET Attachment located in the File Name column of the Attachments section. This will download the Excel PET for you to open and edit in Excel.

File name	Content type	Size bytes	Created by	Created
PET 5302 standard form WIP 2016 09 29 (a...	application/vnd.openxmlformats-officedoc	780288	noroled_approver1	2016-11-06 12:55:20

After you have made your edits to the Excel PET form and saved the new version you will need to attach it to the case by clicking the New button in the Attachments section (screenshot below) and uploading the new PET form to the case. After you upload the new PET form will appear in the attachments section.

File name	Content type	Size bytes	Created by	Created
PET 5302 standard form WIP 2016 09 29 (a...	application/vnd.openxmlformats-officedoc	780288	noroled_approver1	2016-11-06 12:55:20
PET 5302 Training Example.xlsx	application/vnd.openxmlformats-officedoc	780552	noroled_approver1	2016-11-06 13:37:04

New pet Form Attachment

After attaching the modified PET form, scroll up to the Additional comments field in the Notes section in this window and document why you made the edit(s) to the PET.

Notes

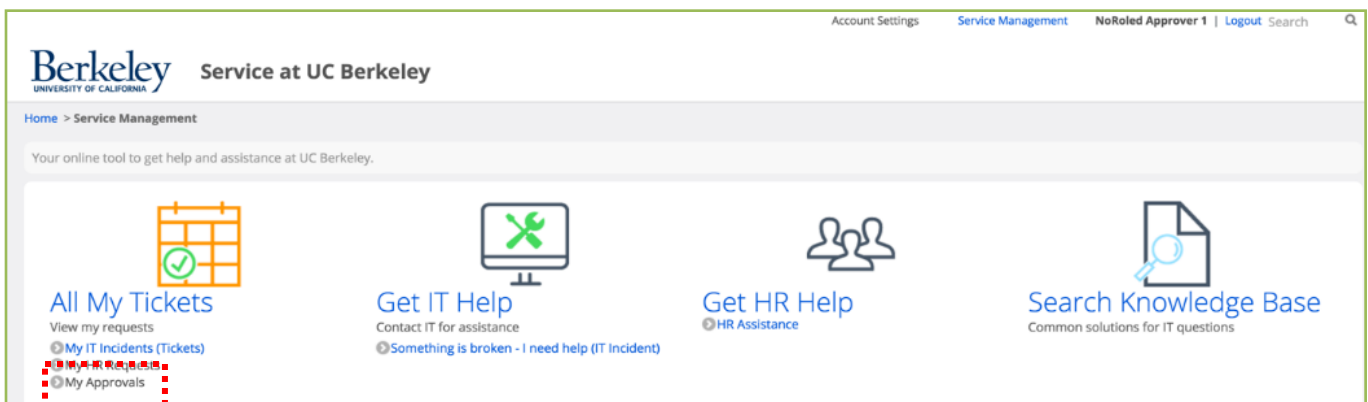
Additional comments

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Reviewing and Editing a PET (continued)

Click on the **Update** button located in the upper right corner of the window to save your work and return to the window containing the Approve/Reject buttons. You may approve or reject the request at this time.

You may also review and edit a Funding Change request by accessing the specific case through your “My Approvals” link located on your CSS ServiceNow Home Page



Additional job aids are located on the *ServiceNow for CSS HR/APS* homepage
<http://sharedservices.berkeley.edu/hr-aps-sn-resources>