ServiceNow for CSS HR/APS

Berkeley Campus Shared Services

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.

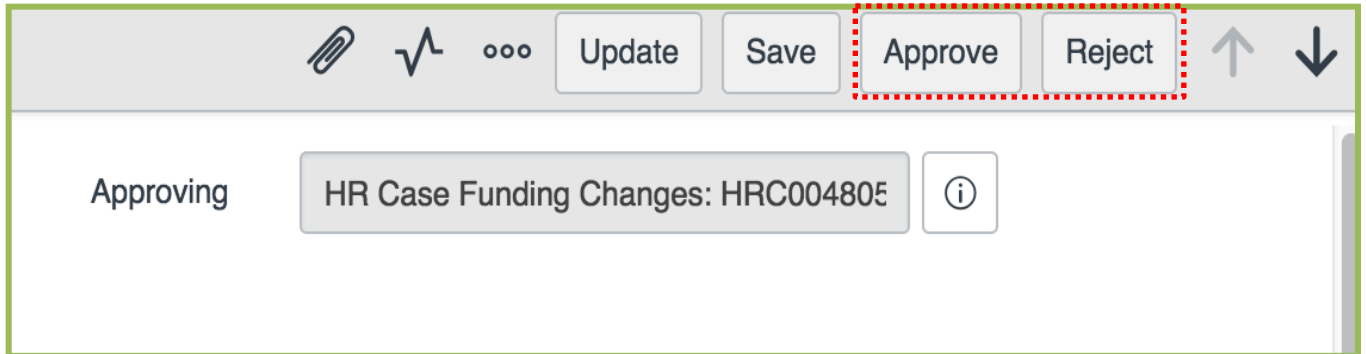If you have any questions, please call us at 510-664-9000, option 3. We are happy to help.

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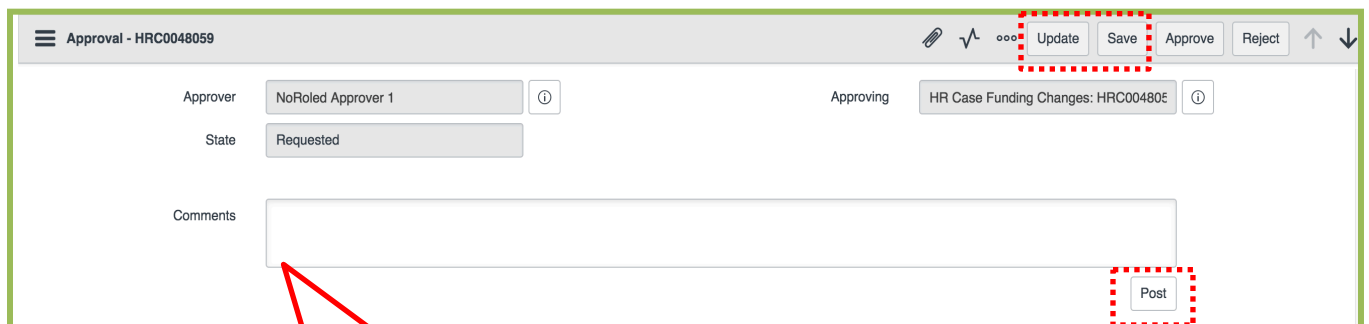

ServiceNow for CSS HR/APS

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.

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 Approve 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 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.

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.

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
Number of Lines	
PAN Confirmation Emails	− +

Funding Change Type	Earnings Distribution Change Only
Record Number	0
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   ▶ ▶▶

Continued on next page

4

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.

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).

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.

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.

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.

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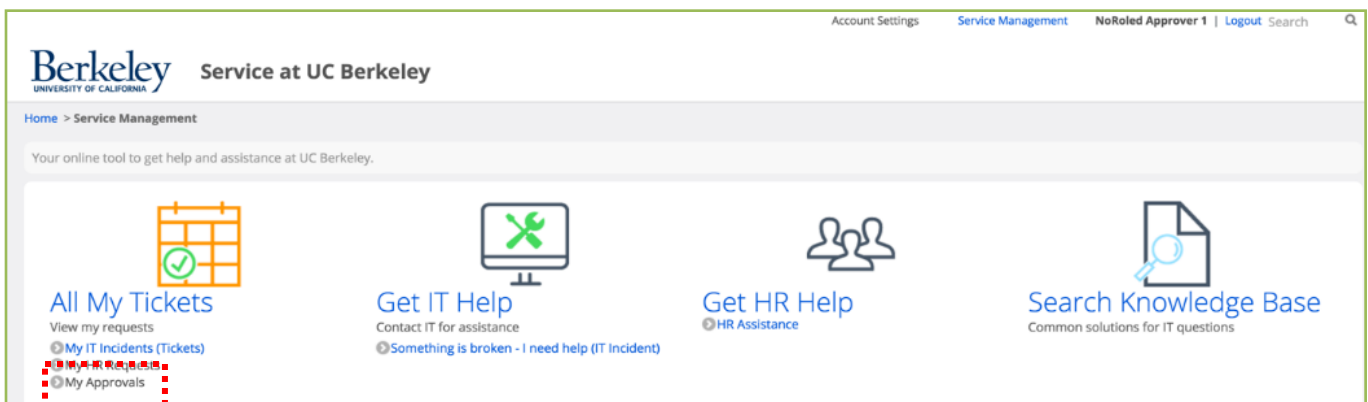
Click on the **Update** button located in the upper right corner of the window to save your work and return to the window containing the Approve/Reject buttons. You may approve or reject the request at this time.

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