

Berkeley **Campus Shared Services**

**Your Guide to**  
**Using ServiceNow**  
**for CSS HR/APS**  
**(Human Resources/Academic**  
**Personnel Support)**

*For Campus Clients Nov 30, 2015 Go-Live*

11/23/2015

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## Chapter 1 – Introduction

### 1.1 Overview

This guide is meant for individuals and departments that utilize Campus Shared Services Human Resources/Academic Personnel Support (CSS HR/APS). Beginning November 30, 2015, ServiceNow is your tool to request, monitor and report on requests CSS HR/APS performs on your behalf. This is the fastest way to have questions answered, problems solved, and services completed.

Anyone with a UC Berkeley CalNet ID and passphrase can submit a request by visiting the CSS HR/APS website (<http://sharedservices.berkeley.edu/human-resources/>) and following the instructions provided there. Alternatively, you can enter ServiceNow directly at <https://berkeley.service-now.com/ess>. Campus users may already be familiar with ServiceNow if you have requested service from Campus Shared Services Information Technology (CSS IT).

ServiceNow offers an improved experience compared to previous CSS HR/APS ticketing services. Using this tool, you're able to see, monitor, and generate reports on the work CSS HR/APS performs for you. Need a way to keep track of the work another employee in your department or unit creates? Use the Watch List, described in more detail later in this guide. ServiceNow's easy-to-use interface provides easy access.

Communications options inside ServiceNow include email notifications, ad-hoc emails, and direct contact inside your requests. Any attached materials are name- and date-stamped, so you see the information CSS HR/APS is using to fulfill your request.

In addition, CSS HR/APS now offers three service types: HR Questions, HR Problems and Service Requests. When you need information or aren't sure what to do, feel free to Ask an HR Question. When you think something is wrong, Report an HR Problem. If you need a specific service request (e.g., recruiting a new team member), choose the applicable category of service request.

ServiceNow enhancements are ongoing throughout 2015 and 2016. Contact your CSS HR/APS Service Director, HR Manager, or HR Partner with ideas for improvements.

## 1.2 Your Request Status

All requests within ServiceNow will have a “status” describing the current state of the case and when email notifications will be sent to you.

| Request Status                  | What Does it Mean?  | Will an Email be Sent? |
|---------------------------------|---|------------------------|
| <b>Requested</b>                | All newly submitted requests within ServiceNow are received in this status. This status means that work has not yet begun on your request.  | Yes                    |
| <b>Work In Progress</b>         | CSS HR/APS has begun work and is currently working to fulfill your request.   | No                     |
| <b>Pending HR System Update</b> | CSS HR/APS cannot continue working on your case until one of the HR Systems that CSS uses (such as HCM or PPS) updates. Once the update has completed and work can begin again, CSS will change the status of your request back to Work in Progress.  | No                     |
| <b>Pending Partner Update</b>   | CSS HR/APS needs information or is waiting for work to be completed by a Campus Partner (such as Central HR or Central Payroll). Work is still being performed on your request.   | No                     |
| <b>Pending Vendor Update</b>    | CSS HR/APS needs information or is waiting for work to be completed by an external vendor (such as Fidelity or a banking institution). CSS will periodically follow up with the external vendor until CSS can continue working on your request.   | No                     |
| <b>Pending Client Update</b>    | CSS HR/APS needs more information from you or your department before work can continue being performed on your request. If you see your request in this status, please check your request and follow up as soon as possible. CSS HR/APS cannot continue working on this request until the needed information is received. | Yes                    |
| <b>Client Updated</b>           | Any time you add a comment in your request or respond to an email notification sent to you by ServiceNow regarding your request, the status of the request will automatically change to “Client Updated.”   | No                     |
| <b>Work Completed</b>           | CSS HR/APS has completed work on your request. If you feel like your request has not been fulfilled, you have five business days to reopen your request.  | Yes                    |
| <b>Reopened</b>                 | Once a request has been in <b>Work Completed</b> status, if the request has still not been fulfilled then the request can be reopened. This status occurs when you reopen a request or CSS HR/APS Staff reopens a request on your behalf.   | Yes                    |
| <b>Closed</b>                   | After your request has been in <b>Work Completed</b> status for five business days, it will automatically close. A request in this status cannot be reopened.   | No                     |

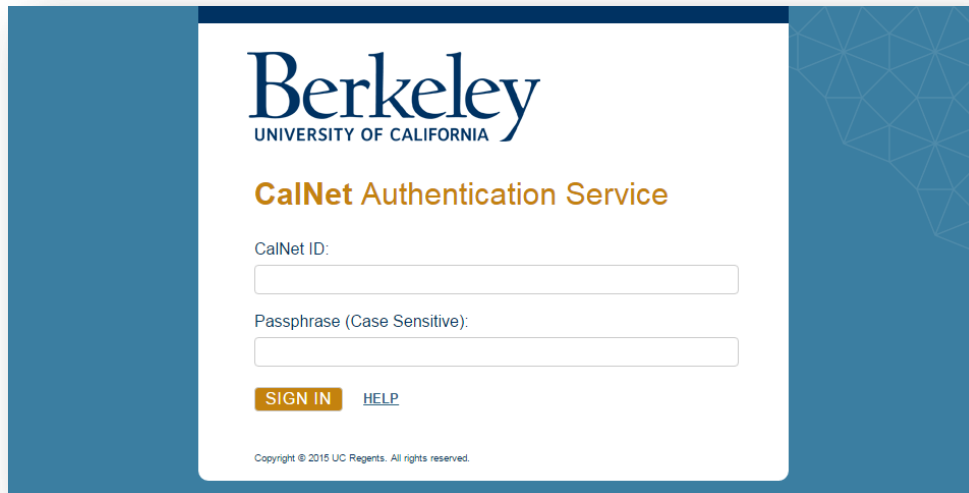
## Chapter 2 – Getting Started

### 2.1 Logging In

You can log in to ServiceNow to create new requests or to monitor your existing requests.

To log into ServiceNow:

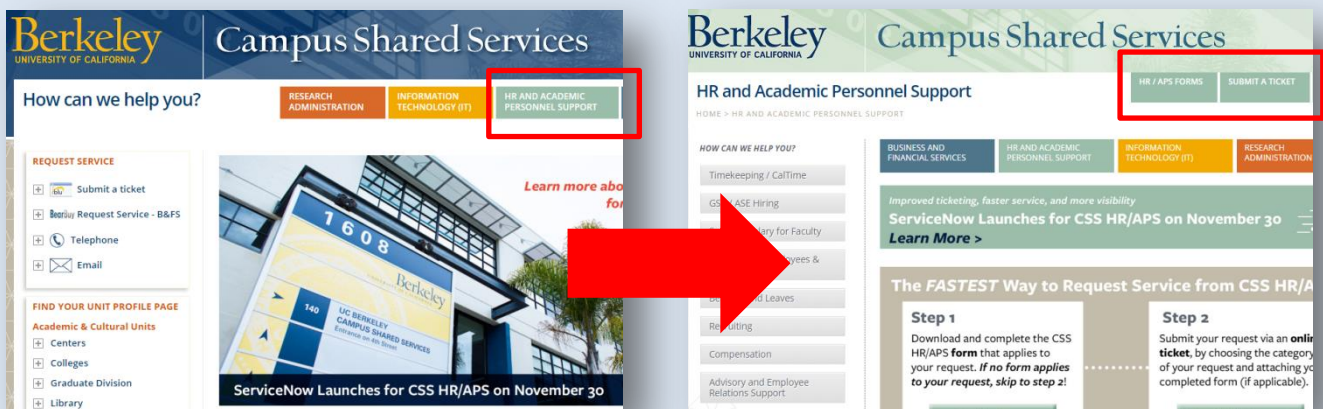
1. Go to [berkeley.service-now.edu/ess](https://berkeley.service-now.edu/ess).
2. Log in with your CalNet ID and passphrase.



That's it! You can now navigate through ServiceNow.

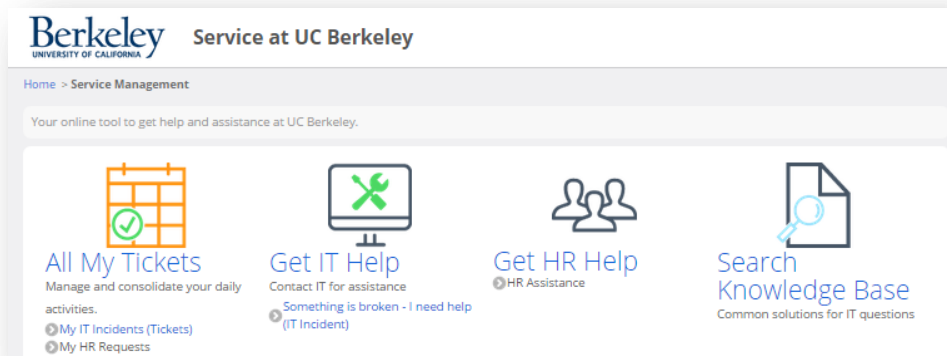
#### Quick Tip: Submitting a New Request

You can also submit a new request (and download the applicable request form) directly from the Campus Shared Services Website: [sharedservices.berkeley.edu](https://sharedservices.berkeley.edu). Just click the **HR and Academic Personnel Support** tab in the top right; from there, **click HR/APS Forms** to download the applicable request form then click **Submit a Ticket** to be taken to the Shared Services Webforms to submit your request!



## 2.2 Your Homepage

As a CSS HR/APS client, your view into ServiceNow provides the information you need to create, monitor, and report on requests. When you log into ServiceNow, you are shown the following page:



This page allows you to create, update, and check the status of any request you have submitted to either CSS IT or CSS HR/APS. Your requests within ServiceNow are often called “cases” or “tickets.”

There are four icons in this page:

### 1. **All My Tickets**

The first icon is **All My Tickets**. Clicking on the icon will take you to a queue of all of your requests within ServiceNow, broken down by department (CSS IT, CSS HR/APS, IST, etc.). To go to a queue of only your IT requests, you can click **My IT Incidents (Tickets)**. To go to a queue of only your HR requests, you can click **My HR Requests**.

### 2. **Get IT Help**

The second icon focuses on CSS IT. Clicking either the **Get IT Help** icon or the **Something is broken – I need help (IT Incident)** link will take you to a form where you can submit an IT request.

### 3. **Get HR Help**

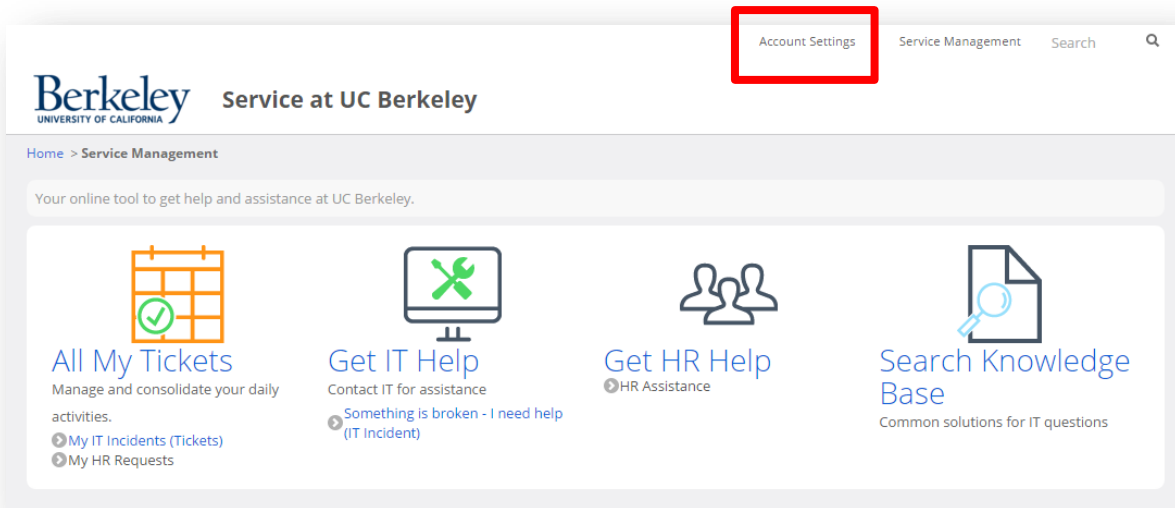
The third icon focuses on CSS HR/APS. Clicking either the **Get HR Help** icon or the **HR Assistance** link will take you to the Shared Services Webforms, where you can create an HR request.

### 4. **Search Knowledge Base**

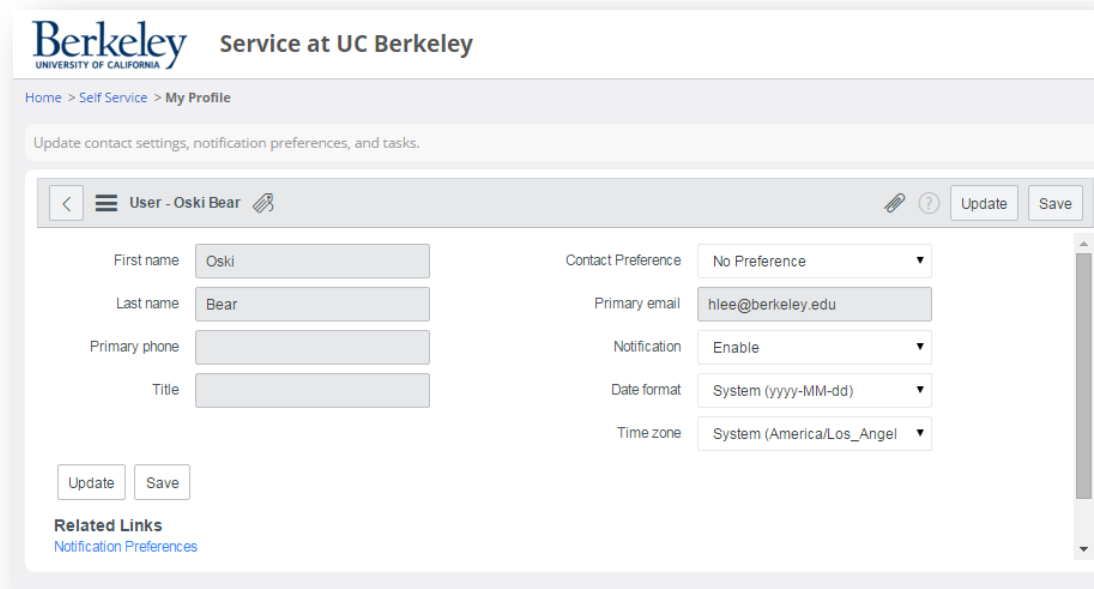
The fourth icon is a link to the ServiceNow Knowledge Base, which is currently populated with articles about CSS IT, IST, HAAS and more. CSS HR/APS currently does not have any articles in the ServiceNow Knowledge Base.

## 2.3 Changing Your Settings

In order to change your settings within ServiceNow, click on **Account Settings** in the top-right corner.



This will take you to your settings page:



In this page, you can make personal changes, such as setting your contact preference or your date format. The grayed-out fields are not editable. To learn how to update your notification preferences, see Section **2.4 Changing Your Email Notification Settings**. Once you make all of the changes you wish to make, click **Save**.

**NOTE:** If you wish to update your phone number or email address, you cannot do so within ServiceNow. Please update your directory listing at [directory.berkeley.edu](http://directory.berkeley.edu) and the change will be reflected in ServiceNow within 24 hours.

## 2.4 Changing Your Email Notifications Settings

Outside of ServiceNow, email notifications are the best way to track the status of and receive updates regarding your requests. However, if you prefer to log in to ServiceNow and track the status of your requests that way, you can turn off email notifications.

To change your email settings, click on **Account Settings** in the top-right corner (as shown in **2.3 Changing Your Settings**). This will take you to your settings page. At the bottom of your settings page, under the **Related Links** section, click **Notification Preferences**.

Berkeley Service at UC Berkeley

Home > Self Service > My Profile

Update contact settings, notification preferences, and tasks.

User - Oski Bear

First name: Oski

Last name: Bear

Primary phone:

Title:

Contact Preference: No Preference

Primary email: hlee@berkeley.edu

Notification: Enable

Date format: System (yyyy-MM-dd)

Time zone: System (America/Los\_Angeles)

Update Save

Update Save

Related Links

Notification Preferences

This will take you to a page that will list all of the email notifications that you can currently turn on or off. **NOTE:** These emails are only sent to you when you are the “submitter” of these requests or if you are on the “watch list” for these requests.

Berkeley Service at UC Berkeley

Home > Self Service > My Profile

Update contact settings, notification preferences, and tasks.

Notification Preferences

New Device Cancel Save

Primary email +

|                                      |                                     |
|--------------------------------------|-------------------------------------|
| HR Add to Watchlist                  | <input checked="" type="checkbox"/> |
| HR Case opened                       | <input checked="" type="checkbox"/> |
| HR Case work completed               | <input checked="" type="checkbox"/> |
| HR Service Request AQ/RP -> SR       | <input checked="" type="checkbox"/> |
| HR Service Request opened            | <input checked="" type="checkbox"/> |
| HR Service Request waiting on client | <input checked="" type="checkbox"/> |
| HR Service Request work completed    | <input checked="" type="checkbox"/> |
| Incident Commented                   | <input checked="" type="checkbox"/> |
| Incident Commented, Caller           | <input checked="" type="checkbox"/> |



ServiceNow allows complete customization when it comes to which types of email notifications you wish to turn on and off. You can choose to turn all email notifications on/off, or you can choose to only turn specific email notifications on/off, depending on which part of Campus Shared Services is handling your request (CSS HR/APS or CSS IT) or what type of HR/APS request it is (an Ask a Question/Report a Problem case type or a Service Request case type).

Email notifications that begin with **HR** refer to any emails that are sent out when you create a CSS HR/APS request. Within HR notifications, anything referring to **HR Case** indicates an “Ask a Question” or “Report a Problem” case type. Anything referring to **HR Service Request** indicates a Service Request case type.

Email notifications that begin with **Incident** refer to any emails that are sent out when you create a CSS IT request.

There are six major types of email notifications that are sent out for CSS HR/APS:

- **Opened:** These email notifications are automatically sent out when a request is first submitted, either by you or on your behalf. It confirms that CSS HR/APS has received your request and provides you with your request number and a link into your request in ServiceNow.
- **Waiting on Client:** These email notifications are sent when CSS HR/APS needs more information from you. Turning off this notification is highly discouraged and could cause delays in service; CSS HR/APS will only send this email notification if work cannot continue without your input.
- **Add to Watchlist:** These email notifications are sent when you are added to the Watch list of a request when the request is first submitted.
- **Work Completed:** These email notifications are sent when CSS HR/APS has completed work on your request. If you feel like your request has not been fulfilled, you have five business days from the day you receive this email notification to reopen your request.
- **Reopened:** These email notification are sent when either you or a CSS HR/APS Staff Member reopens your case.
- **Cancelled:** These email notifications are sent when you ask CSS HR/APS to cancel your request. It confirms that the request has been cancelled and provides instructions for further follow-up, if desired.

By default, all of your email notifications will be turned on. To turn off a specific email notification type (for example, “HR Add to Watchlist”), click the green toggle icon on the right side of that email notification to cause it to toggle off (it should then become gray).

The screenshot shows the Berkeley Service at UC Berkeley notification preferences page. The page title is "Berkeley Service at UC Berkeley" and the breadcrumb is "Home > Self Service > My Profile". The main heading is "Notification Preferences" with buttons for "New Device", "Cancel", and "Save". Below the heading is a "Primary email" section with a "+" icon. The list of notification preferences includes:

| Notification Type                    | Status     |
|--------------------------------------|------------|
| HR Add to Watchlist                  | Off (Gray) |
| HR Case opened                       | On (Green) |
| HR Case work completed               | On (Green) |
| HR Service Request AQ/RP -> SR       | On (Green) |
| HR Service Request opened            | On (Green) |
| HR Service Request waiting on client | On (Green) |
| HR Service Request work completed    | On (Green) |
| Incident Commented                   | On (Green) |
| Incident Commented, Caller           | On (Green) |
| Incident Opened                      | On (Green) |

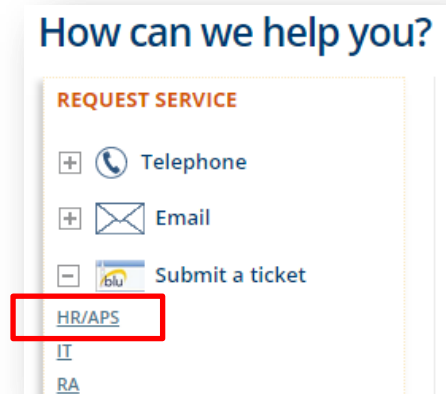
#### TECHNICAL TIP: WHY ARE SOME EMAIL TYPES NOT VISIBLE?

In order to turn off a specific type of email notification, that email notification must be triggered at least once. After that email notification is sent to you for the first time, the email notification can then be turned off in this page. For example, the **Reopened** email notification does not appear in the above list. This means that the user in the above example has not yet had a request reopened. However, if they then proceed to reopen one of their requests, the **Reopened** email notification will be triggered and sent out; once this happens, the **Reopened** email notification will show up on this list and can then be turned off.

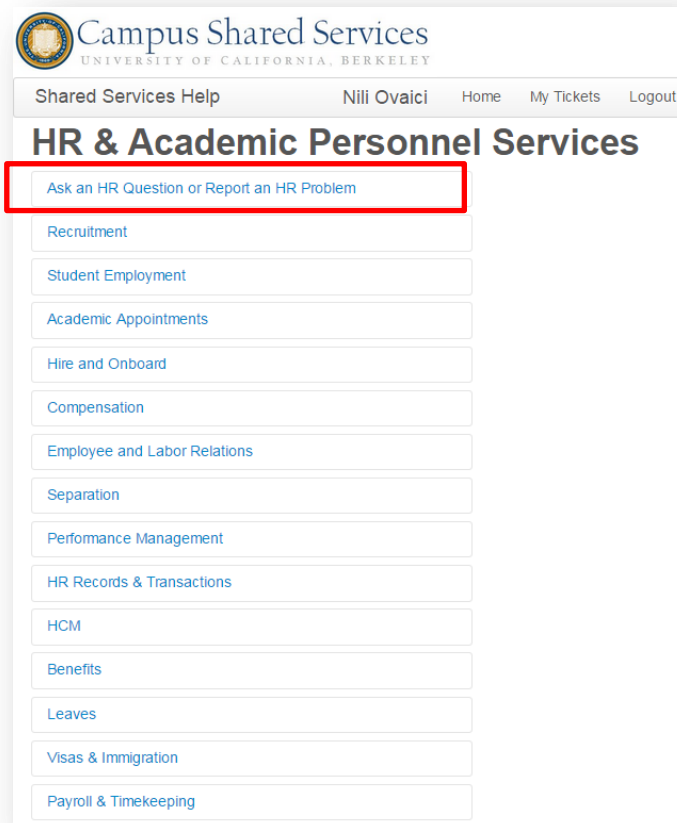
## Chapter 3 – Submitting and Managing Your Requests (Cases)

### 3.1 Creating a New Case: Ask a Question or Report a Problem

CSS HR/APS encourages you to submit your own requests. You can use the webforms to make requests via the Shared Services site ([shareservices.berkeley.edu](http://shareservices.berkeley.edu)). Click on **Submit a Ticket** in the left sidebar, and then click on **HR/APS**.



Clicking this link will take you to the Shared Services Webforms. All types of requests are available via these forms, including **Ask an HR Question or Report an HR Problem**:



Clicking this link takes you to the **Ask an HR Question or Report an HR Problem** request form in ServiceNow.

**Berkeley** Service at UC Berkeley  
UNIVERSITY OF CALIFORNIA

Home > Service Management > Ask an HR Question or Report an HR Problem

Ask an HR Question or Report an HR Problem

General HR questions will be answered as soon as possible (e.g., "Who is my HR Partner?", or "I would like more information about my benefits options.") HR problems will be immediately escalated (e.g., "I am missing a paycheck", or "I've had a lapse in benefits coverage.")  
For a complete list of services, visit the URL: <http://sharedservices.berkeley.edu/human-resources/>

\* How may we assist you? NOTE: Email notifications will be sent to you as the "submitter."  
 More information  
 Ask a question  
 Report a Problem

\* What is your preferred contact method for this request?  
 More information  
 UC Berkeley Email  
 UC Berkeley Phone

\* Who is the person affected by this request? (Email notifications are sent to you, the "submitter".)  
 More information  
 Me  
 Someone else (inside UC Berkeley)

\* Provide a subject line for this request (character limit 80):

\* Provide a full description for this request:

When you submit a request, you will be taken to your queue within ServiceNow, and there will be a confirmation message highlighted in blue at the top of the queue that will tell you your request number:

Home > Service Management > Ask an HR Question or Report an HR Problem

Ask an HR Question or Report an HR Problem

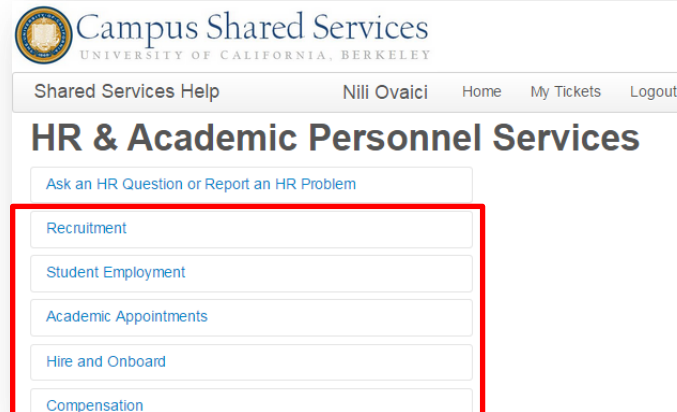
HR Cases [Create New Case](#) Search for text Search 1 to 4 of 4

Your request has been received. HR Case HRC0001310 has been created.

|                          | Number                     | Category                | Type             | Subject                            | Status    | Watch list   | Opened by                        | Created             | Updated             |
|--------------------------|----------------------------|-------------------------|------------------|------------------------------------|-----------|--------------|----------------------------------|---------------------|---------------------|
| <input type="checkbox"/> | <a href="#">HRC0001228</a> | Benefits Services       | Ask a Question   | When is Open Enrollment this year? | Requested | Cal Oskibear | <a href="#">Carolyn Warfield</a> | 2015-10-19 18:05:58 | 2015-10-22 01:18:10 |
| <input type="checkbox"/> | <a href="#">HRC0001230</a> | Payroll and Timekeeping | Report a Problem | Hibernated too long this year      | Requested | Oski Bear    | <a href="#">Cal Oskibear</a>     | 2015-10-19 18:13:38 | 2015-10-19 18:14:54 |

### 3.2 Creating a New Case: Service Request

Please continue to use the Shared Services Webforms when you have specific service request needs. (See **3.1 Creating a New Case: Ask a Question or Report a Problem** for directions on how to get to this page):



Campus Shared Services  
UNIVERSITY OF CALIFORNIA, BERKELEY

Shared Services Help    Nili Ovaici    Home    My Tickets    Logout

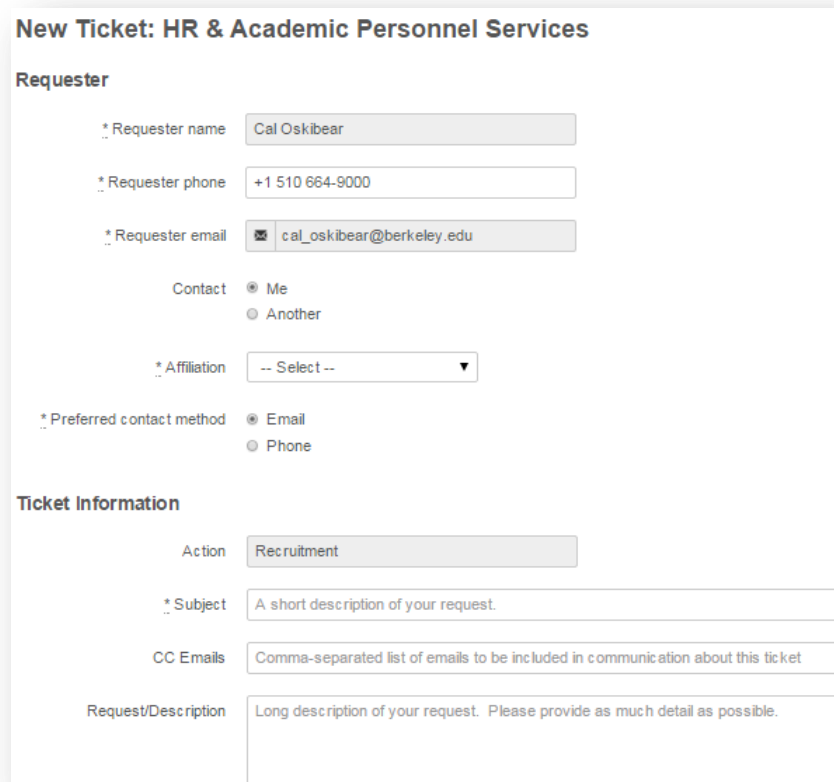
## HR & Academic Personnel Services

Ask an HR Question or Report an HR Problem

- Recruitment
- Student Employment
- Academic Appointments
- Hire and Onboard
- Compensation

From there, you will choose the link that is most appropriate for you and fill out the form as usual.

**Attaching the applicable PDF form will expedite service and is also strongly encouraged.** Once submitted, the request will be created within ServiceNow.



### New Ticket: HR & Academic Personnel Services

**Requester**

\* Requester name: Cal Oskibear

\* Requester phone: +1 510 664-9000

\* Requester email: cal\_oskibear@berkeley.edu

Contact:  Me  Another

\* Affiliation: -- Select --

\* Preferred contact method:  Email  Phone

**Ticket Information**

Action: Recruitment

\* Subject: A short description of your request.

CC Emails: Comma-separated list of emails to be included in communication about this ticket

Request/Description: Long description of your request. Please provide as much detail as possible.

**NOTE:** There may be a brief delay between you submitting the request using the Shared Services Webforms and the request being visible in ServiceNow due to system communications.

### 3.3 Your View of Your Request

HR Case - HRC0001230

Number: HRC0001230

Status: Requested

Submitter: Cal Oskibear

Opened by: Cal Oskibear

Affected Employee: Cal Oskibear

Created: 2015-10-19 18:13:38

Type: Report a Problem

Related Case: [Search]

Category: Payroll and Timekeeping

Watch list: Oski Bear

\* Subject: Hibernated too long this year

Description: Hi all, I hibernated a little too long this year and forgot to turn in my timesheet from the last Cal game. Could you help me solve this problem so I get paid for my hard work? My supervisor is copied on the Watch list so that you see I have approval.

Notes

Additional comments: [Text Area]

Activity: 2015-10-19 18:13:38 Cal Oskibear Changed: Submitter, Status, Watch list

Submitter: Cal Oskibear

Status: Requested

Watch list: Oski Bear

#### Terms and Definitions

The grayed-out fields in your request view are not editable.


- **Number:** This is your request (“case”) number. Every HR request begins with “HRC” to indicate that it is an HR/APS request.
- **Submitter:** This is the person who submitted the request. This person will be the point of contact for this request and will receive email notifications.
- **Affected Employee:** This is the person that is either receiving service or being affected by the service. This person will not have visibility into the case. If you wish for this person to have visibility into the request, you must add them to the Watch list.
- **Type:** This is the type of request that you submitted: Ask a Question, Report a Problem, or Service Request.
- **Category:** This is the category of the request (e.g., Compensation or Records Management).

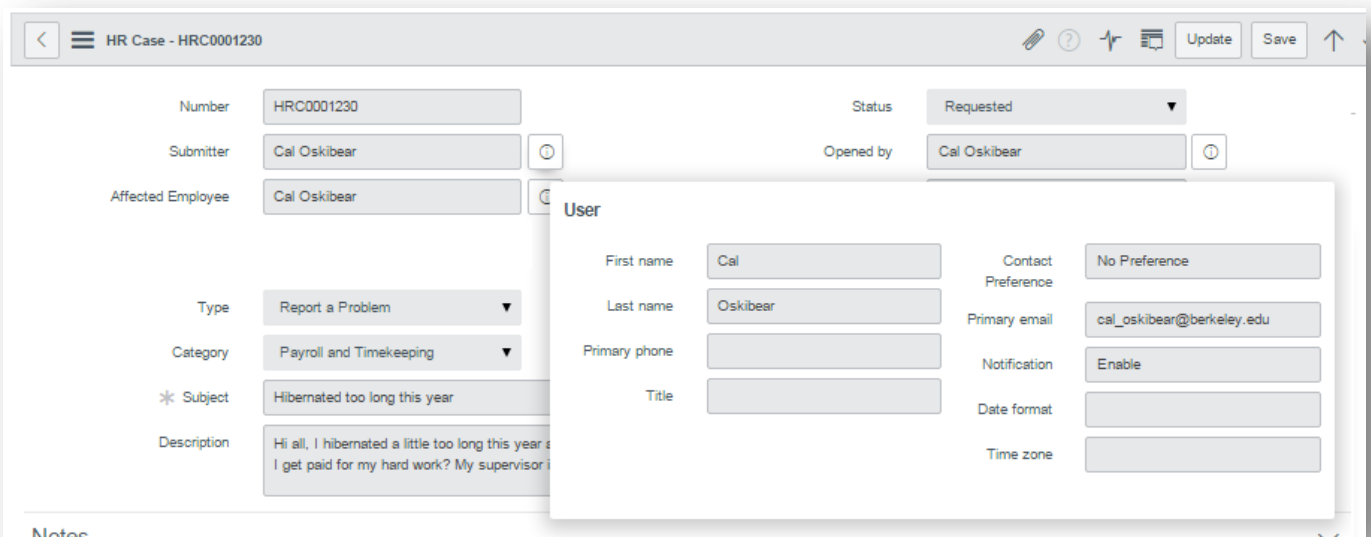
- **Status:** This is the status of the request. See Section **1.2 Your Request Status** to understand what each status means.
- **Opened By:** This shows the person who physically opened the request.
- **Created:** This is the date and time that the request was created within ServiceNow.
- **Related Case:** This searchable field allows you to indicate if you believe that this request is related to a request that you've submitted in the past. You can search by request number or subject line.
- **Watch List:** This is a list of individuals who can view and receive email notifications about this request. Watchers can also add additional comments and upload attachments to a request.
- **Subject:** This is a short description of the request that will be the subject line of email notifications. There is an 80 character limit on the subject line. **This field should not contain any sensitive information.**
- **Description:** This is a longer description of the request that will have more details.

#### Notes Section

- **Additional Comments:** This area allows you to communicate with CSS HR/APS Staff. If you have any changes or updates for your request, or if you are responding to a request for further information, you can write a comment in this box and click **Save**. You can enter an additional comment at any time that work is being performed on the request.
- **Activity:** This is a history of all the communication and changes made in the request.

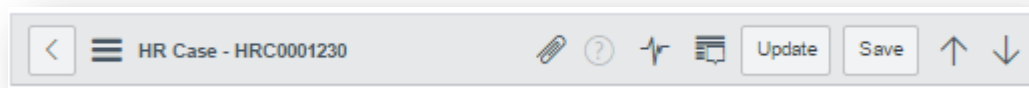
#### Information Hover Button






If you hover over the **Information** button (  ) next your name, it will show more information about you, such as your name, job title, and email address. If any of this information is incorrect, you cannot update it within ServiceNow. Please update your directory listing at [directory.berkeley.edu](http://directory.berkeley.edu) and the change will be reflected in ServiceNow within 24 hours.



The screenshot displays the ServiceNow interface for an HR Case (HRC0001230). The form includes fields for Number, Submitter, Affected Employee, Status, Opened by, Type, Category, Subject, and Description. A modal window titled "User" is open, showing fields for First name (Cal), Last name (Oskibear), Primary phone, Title, Contact Preference (No Preference), Primary email (cal\_oskibear@berkeley.edu), Notification (Enable), Date format, and Time zone.

### Top Bar Icons



- **Back Arrow** (): Clicking this back arrow will take you back to the previous page.
- **Hamburger** (): Clicking this icon opens a dropdown menu of options, including the ability to export the request as a PDF. See Section **4.2 Exporting Your Requests** for more information about how to export your requests.
- **Attachments** (): Clicking this icon will allow you to add an attachment to your request. See section **3.3 Adding an Attachment** for more information about how to do this.
- **Activity Stream** (): Clicking this icon will show a pop-up window of all the activity within the request.
- **Live Feed** (): Clicking this icon will open a social IT application that allows the posting and sharing of content across ServiceNow. CSS HR/APS currently does not use this functionality.

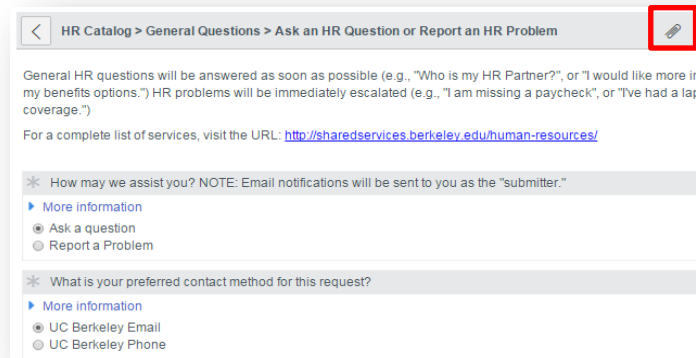


### 3.4 Adding an Attachment

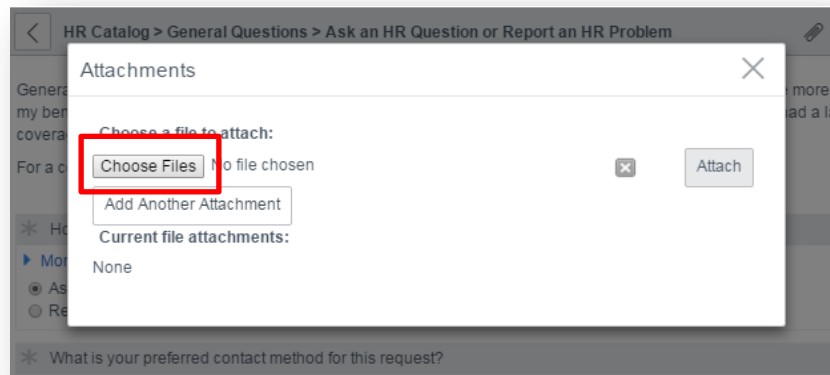
Attachments can be added at any point of the request creation process for all request types.

#### *During Ask a Question/Report a Problem Creation*

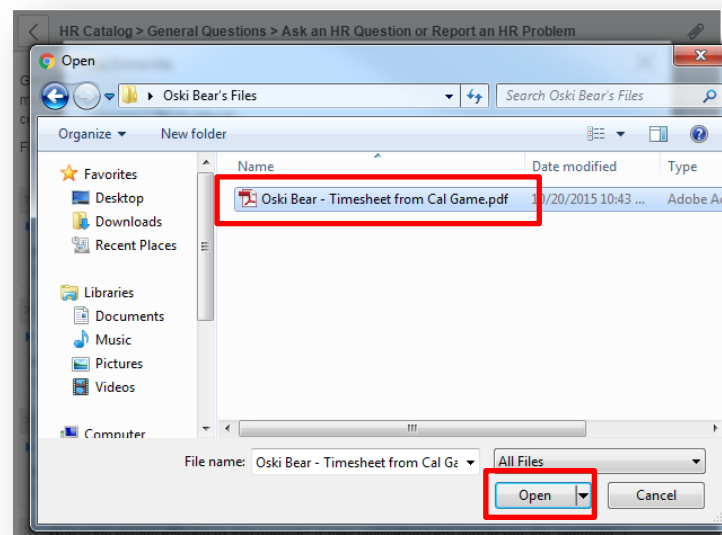
When filling out the Ask a Question/Report a Problem form on ServiceNow, you can upload an attachment to your request by clicking the paperclip icon in the top right.



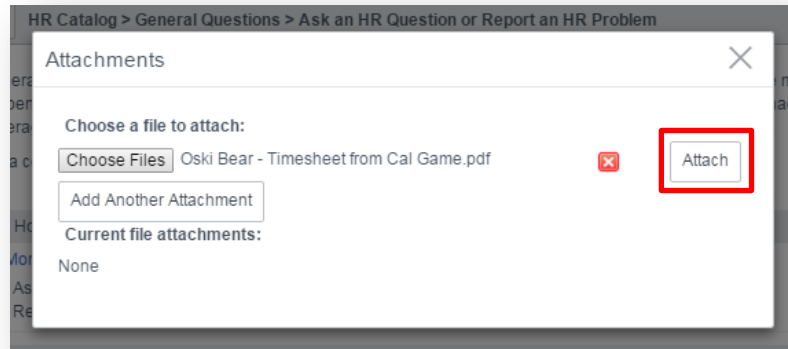
Click the **Choose Files** button in the pop-up window that appears.



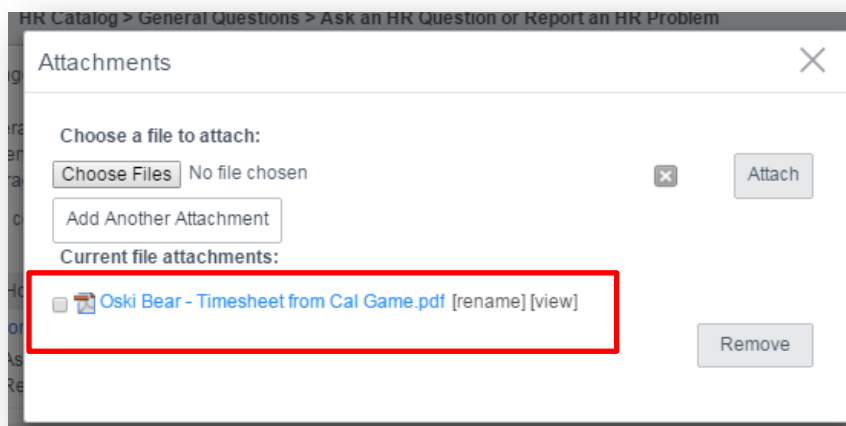
A second pop-up window will appear. In that window, find the file you wish to attach and click on it. Then click **Open**.



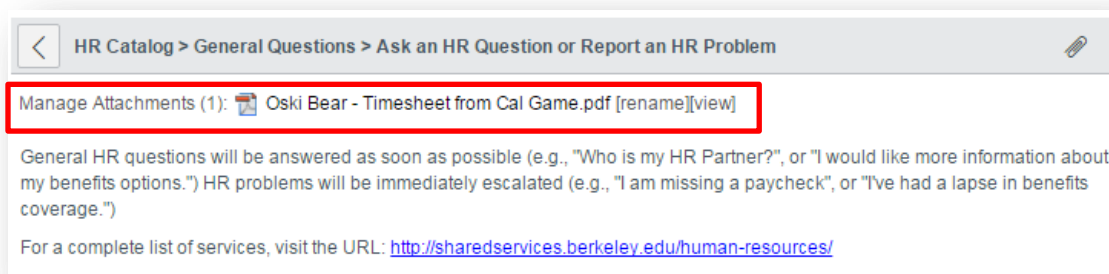
It will show your attachment file name in the first pop-up window. If you wish to continue with attaching this file, then click **Attach**. If you wish to change your file, click the red x button (✖) and choose the appropriate file again. You can also click **Add Another Attachment** to add additional attachments to your request.



Once you click Attach, the file will automatically be attached to your request and will show under the **Current File Attachments** section of the pop-up:

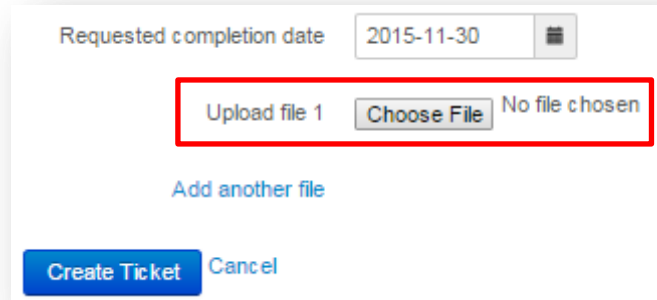


From there, you can click **[rename]** to rename your file or **[view]** to view it. If you have no more files to upload, click the **X** button at the top right to close the pop-up window and return to the Ask a Question/Report a Problem form. The attachment will now be listed at the top of the form. You can now continue filling out the form as usual.



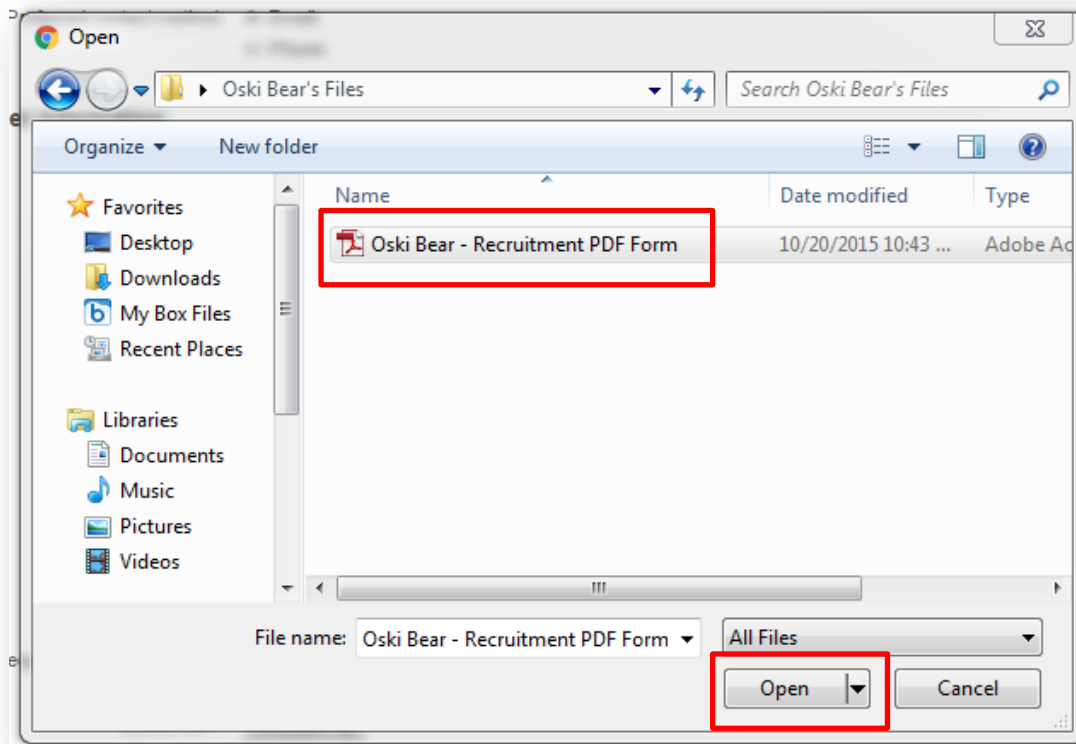
### During Service Request Creation

When filling out a Service Request form on the Shared Services Webforms, the **Upload file** area the bottom of the form allows you to upload any attachments.




The screenshot shows a section of a web form. At the top, there is a field for "Requested completion date" with the value "2015-11-30" and a calendar icon. Below this is a red-bordered box containing the text "Upload file 1", a "Choose File" button, and "No file chosen". Underneath the box is a blue link that says "Add another file". At the bottom of the form section are two buttons: a blue "Create Ticket" button and a grey "Cancel" button.

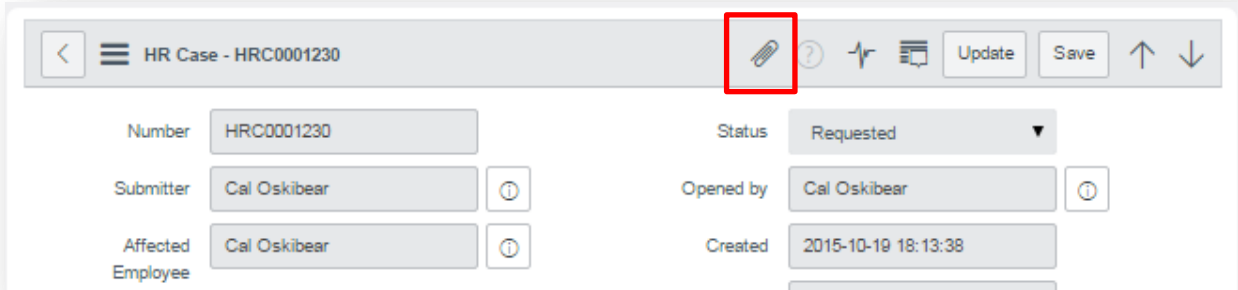
Click the **Choose File** button to open up a pop-up window. Find the file you wish to attach and click on it. Then click **Open**.



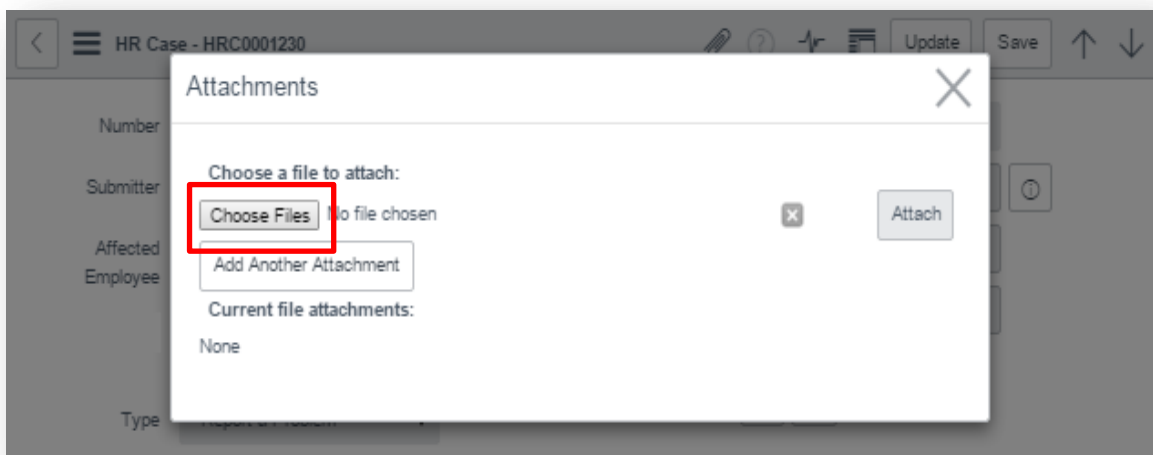
This will automatically attach your file to your request within ServiceNow after you submit the form.

### After Request Creation

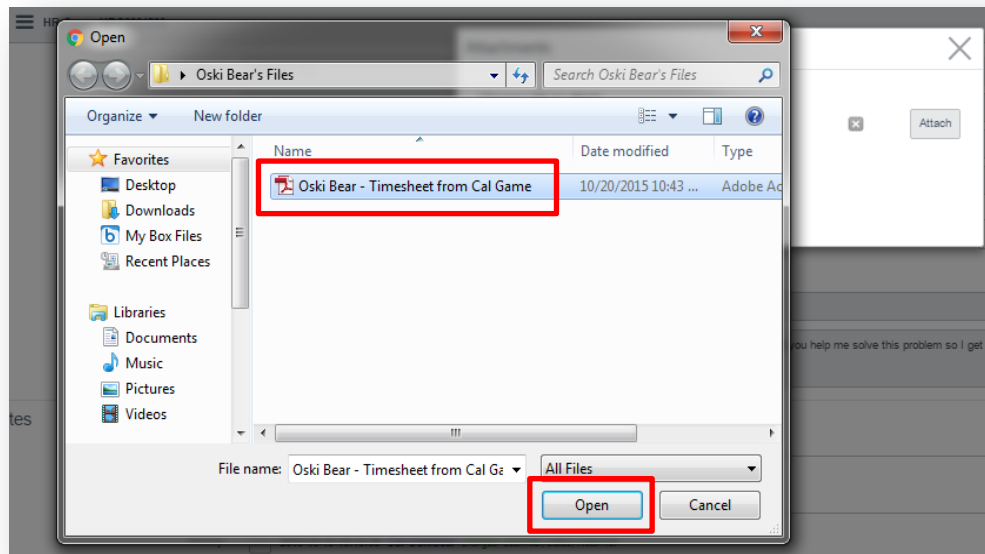
After you have created your request within ServiceNow, you can still upload new attachments. Click the paperclip icon (  ) at the top right of your request:



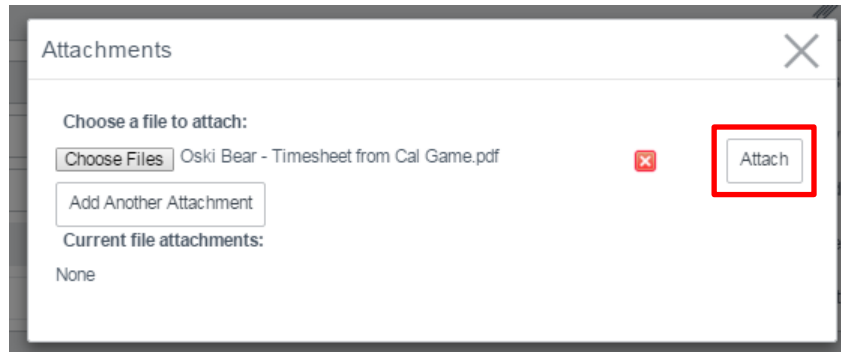
This will open up a pop-up window. Click the **Choose Files** button in the pop-up window.



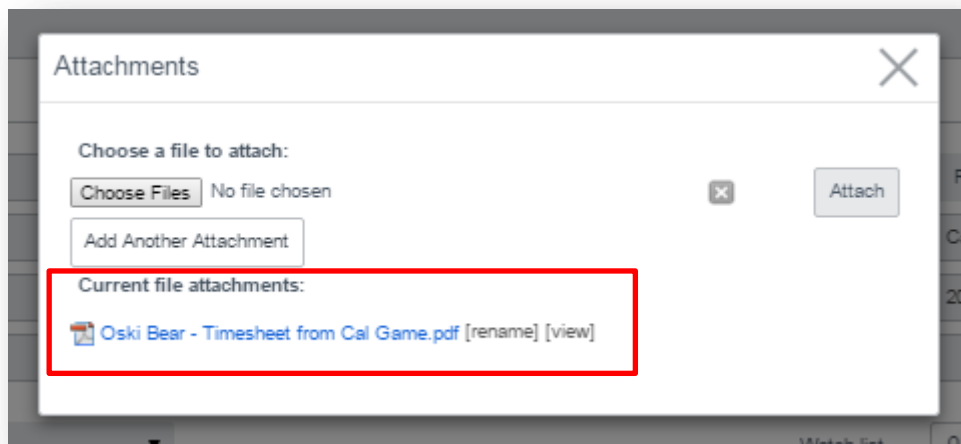
A second pop-up window will appear. In that window, find the file you wish to attach and click on it. Then click **Open**.



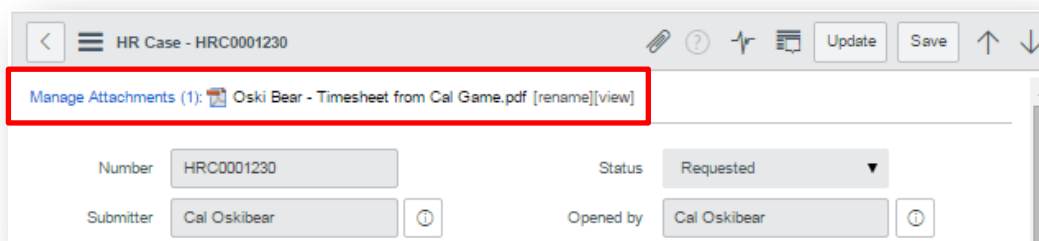
It will show your attachment file name in the first pop-up window. If you wish to continue with attaching this file, then click **Attach**. If you wish to change your file, click the red x button (✖) and choose the appropriate file again. You can also click **Add Another Attachment** to add additional attachments to your request.



Once you click Attach, the file will automatically be attached to your request and will show under the **Current File Attachments** section of the pop-up:



From there, you can click **[rename]** to rename your file or **[view]** to view it. If you have no more files to upload, click the x button at the top right to close the pop-up window and return to your case view. The attachment will now be listed at the top of the case. You do not need to click **Save** to save this attachment.



### 3.5 Adding or Removing Someone to the Watch List

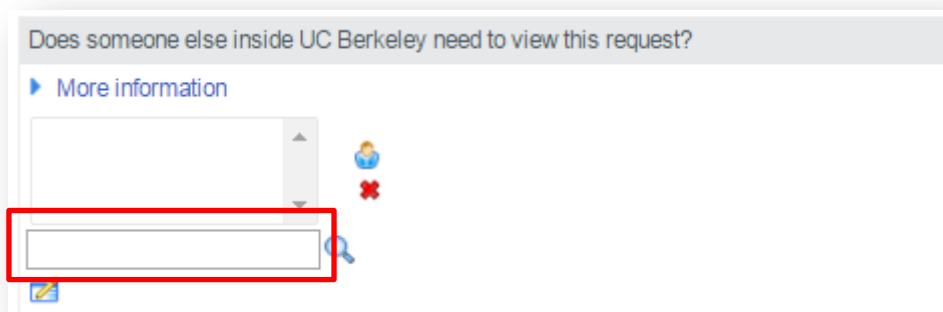
The Watch list allows you to grant users visibility into your request. The only non-CSS HR/APS Staff who can view a request within their ServiceNow queue are the people in the **Submitter** field and the **Opened By** field of a request – meaning, the people who created and requested the request. If you would like anyone else to have visibility into your case, such as your supervisor, your funding approver, or your departmental manager, you must add them to the Watch list of your request. Individuals added to the Watch list will also receive email notifications about the request. You do not need to add your HR/APS Partner or Representative to the Watch list, as they will already have visibility into the request.

#### Adding Someone to the Watch list

Users can be added to the Watch list in different ways, depending on whether the request has been created or not.

#### During Ask a Question/Report a Problem Request Creation

The following question on the Ask a Question/Report a Problem will allow you to add users to the Watch list:

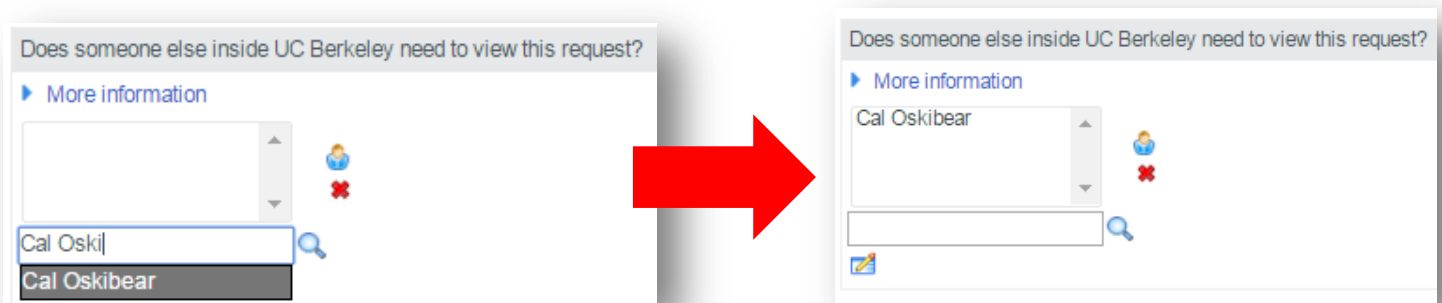


Does someone else inside UC Berkeley need to view this request?

More information

[Search input field highlighted with a red box]

To add someone, simply type their name in the look-up field (highlighted above). As you type, the look-up field will show you a dropdown list of names that match your typed text. Click the appropriate one to add them to the Watch list. **NOTE:** You can only look up individuals inside of UC Berkeley in this field.



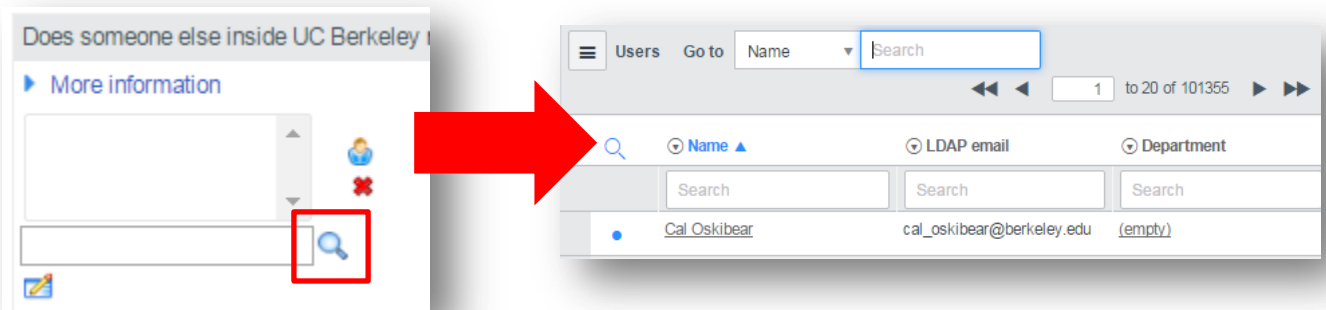
Does someone else inside UC Berkeley need to view this request?

More information

Cal Oskij  
Cal Oskibear

Cal Oskibear

If you are having difficulty finding the individual, click the magnifying glass to the left of the look-up field and a pop up window will appear that will allow you to perform a more advanced search.



### TROUBLESHOOTING TIP: HAVING TROUBLE FINDING SOMEONE?

Using an asterisk (\*) at the beginning of your search will act as a wildcard in the search (meaning that the asterisk will substitute as any letter or number). For example, if Cal Oskibear is saved in the system as “Cal B. Oskibear,” searching for “Cal Oskibear” might not return the appropriate result. Instead, search for “\*Cal Oskibear.” Note that the asterisk (\*) must be at the beginning of the search term in order for the wildcard to work.

Once you have found the appropriate individual and added them to the Watch list, they will have visibility into your request when you click **Submit** at the bottom of the form.

### During Service Request Creation

When filling out a Service Request form on the Shared Services Webforms, you can only add users to the Watch list by entering their email in the **CC Emails** field. Users added in this manner will receive email notifications about this request but will not have visibility into the ticket when they log into ServiceNow.

**New Ticket: HR & Academic Personnel Services**

**Requester**

\* Requester name

\* Requester phone

\* Requester email

Contact  Me  Another

**Ticket Information**

Action

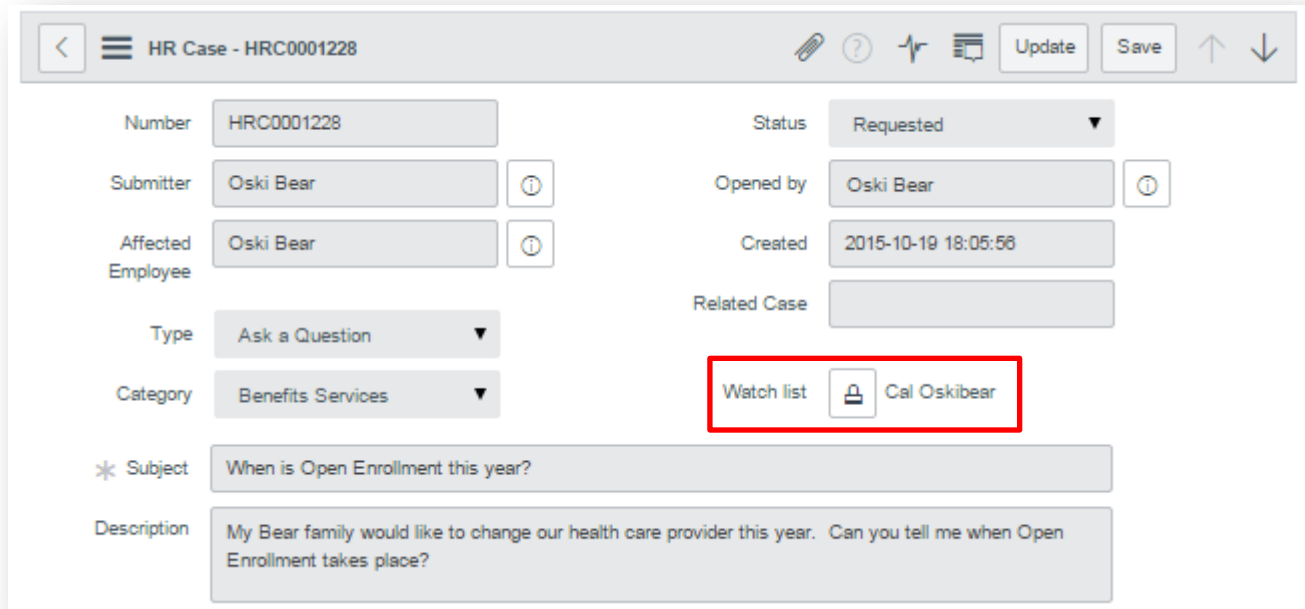
\* Subject

**CC Emails**

### After Request Creation

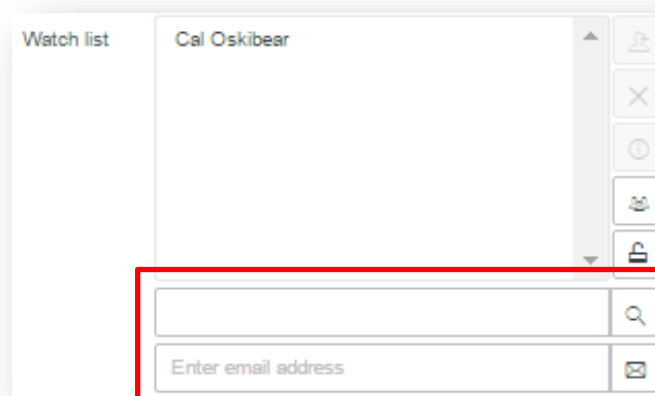
When your request has been created, you can add users to the Watch list through the look-up field or using their email address.

To add a user after the request has been created, open your request within ServiceNow and click the **Unlock Icon** (🔓) next to the **Watch list** field.



The screenshot shows the ServiceNow interface for an HR Case (HRC0001228). The form includes fields for Number, Status, Submitter, Affected Employee, Type, Category, Subject, and Description. The Watch list field is highlighted with a red box, showing 'Cal Oskibear' and an unlock icon.

This will expand the Watch list area to allow you to add users.



The screenshot shows the expanded Watch list area. The Watch list field is expanded to show 'Cal Oskibear' and a search field. The search field is highlighted with a red box, showing a magnifying glass icon and the text 'Enter email address'.

If the user you wish to add to the Watch list is a part of UC Berkeley, you can use the look-up field next to the magnifying glass to add them to the Watch list. This is the encouraged method of adding users to the Watch list, as they will have visibility into the request and will receive email notifications. If you cannot find



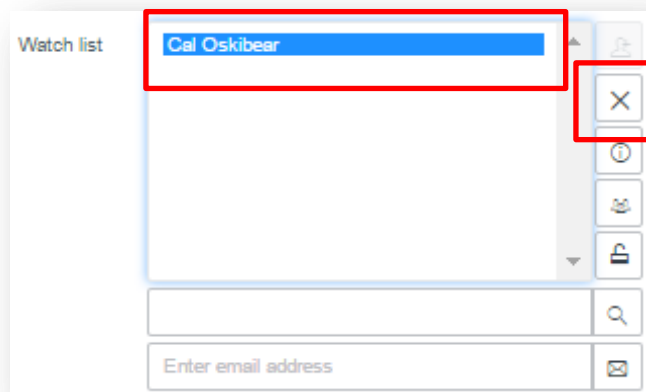
the user, click the magnifying glass to the left of the look-up field to perform a more advanced search.

If the user you wish to add to the Watch list is outside UC Berkeley (or if it is not a user, but instead a mailing list), enter the email address in the email field. **NOTE:** Users added by their email address cannot see the request within their ServiceNow queue, even if they are a UC Berkeley employee. Only use the email address field to add users if they are not within UC Berkeley. If entering a mailing list into the watch list, the users on the mailing list will not have visibility into the request when logging into ServiceNow. They will need to be added to the Watch list individually in order to have visibility.

Click **Save** to save your changes.

### **Removing Someone to the Watch list**

To remove a user from the Watch list, click the **Unlock Icon**  next to **Watch list** field to expand it. Then highlight the user in the Watch list box and click the **X** button to remove them.



After you click **Save** on the request, the user you removed will no longer have visibility into your request nor will they receive any further email notifications.

## Chapter 4 - Navigating and Understanding Your Queue

You can access your queue by clicking **My HR Requests** from the ServiceNow homepage or by clicking the link provided in email notifications.

|                          | Number                     | Category                | Type             | Subject                            | Status    | Watch list   | Opened by                        | Created             | Updated             |
|--------------------------|----------------------------|-------------------------|------------------|------------------------------------|-----------|--------------|----------------------------------|---------------------|---------------------|
| <input type="checkbox"/> | <a href="#">HRC0001228</a> | Benefits Services       | Ask a Question   | When is Open Enrollment this year? | Requested | Cal Oskibear | <a href="#">Carolyn Warfield</a> | 2015-10-19 18:05:56 | 2015-10-22 01:18:10 |
| <input type="checkbox"/> | <a href="#">HRC0001230</a> | Payroll and Timekeeping | Report a Problem | Hibernated too long this year      | Requested | Oski Bear    | <a href="#">Cal Oskibear</a>     | 2015-10-19 18:13:38 | 2015-10-19 18:14:54 |
| <input type="checkbox"/> | <a href="#">HRC0001229</a> | Payroll and Timekeeping | Service Request  | Extra hours from Cal game          | Requested | Cal Oskibear | <a href="#">Carolyn Warfield</a> | 2015-10-19 18:08:46 | 2015-10-19 18:10:00 |

Your queue will show every request that you have visibility into. These include requests that you created, that an HR Staff member created for you, or for which you have been added to the Watch list.

To view the details of a request, you can click on the request number in the **Number** column to be taken into your request. To open a new request, click on the **Create New Case** button, which will take you back to the Shared Services Webforms.

**NOTE:** The queue will show every request that you have visibility into within ServiceNow. If you submit a large number of requests, you should consider sorting and grouping them. See **4.1 Sorting and Grouping By** for more information.

## 4.1 Sorting and Grouping By

In your ServiceNow queue, you will see every request that you have visibility into, even if the request has already been fulfilled and closed. If you have many requests in your queue, it might make it harder to find a specific request. **Sorting** and **Grouping By** will allow you to organize your queue and find requests more easily.

### Sorting

You can sort your requests by clicking on the column header that you wish to sort by. This will allow you to sort your requests in alphabetical/reverse alphabetical order or by ascending/descending order, if it is a numerical or date column (such as **Created** or **Updated**). For example, if you click on the **Status** column header to sort, it will list your requests alphabetically (A to Z) by Status name. Clicking the **Status** column header again will re-sort your tickets in reverse alphabetical order (Z to A).

|                          | Number                     | Category                | Type             | Subject                            | Status    | Watch list   | Opened by        | Created             | Updated             |
|--------------------------|----------------------------|-------------------------|------------------|------------------------------------|-----------|--------------|------------------|---------------------|---------------------|
| <input type="checkbox"/> | <a href="#">HRC0001228</a> | Benefits Services       | Ask a Question   | When is Open Enrollment this year? | Requested | Cal Oskibear | Carolyn Warfield | 2015-10-19 18:05:56 | 2015-10-22 01:18:10 |
| <input type="checkbox"/> | <a href="#">HRC0001230</a> | Payroll and Timekeeping | Report a Problem | Hibernated too long this year      | Requested | Oski Bear    | Cal Oskibear     | 2015-10-19 18:13:38 | 2015-10-19 18:14:54 |
| <input type="checkbox"/> | <a href="#">HRC0001229</a> | Payroll and Timekeeping | Service Request  | Extra hours from Cal game          | Requested | Cal Oskibear | Carolyn Warfield | 2015-10-19 18:08:46 | 2015-10-19 18:10:00 |

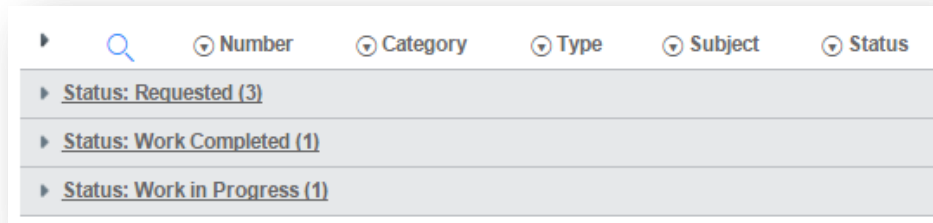
### Grouping By

Another option you can use to organize your requests is the **Group By** feature. Using this will allow you to “group” your requests by the criteria listed in your queue columns (**Type**, **Category**, **Status**, etc.). (Please note that the only columns in your queue that you will not be able to group your requests by are **Watch list**, **Created**, and **Updated**.)

To group your requests, right-click on the column in your queue that contains the criteria that you wish to group by (for example, **Status**) and click the **Group By** option that appears in the dropdown menu:

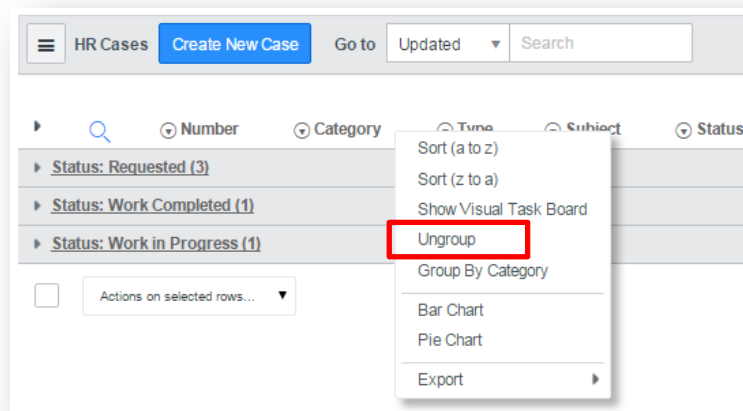
|                          | Number                     | Category                | Type             | Subject   | Status           | Watch list   | Opened by        | Created             | Updated             |
|--------------------------|----------------------------|-------------------------|------------------|---|------------------|--------------|------------------|---------------------|---------------------|
| <input type="checkbox"/> | <a href="#">HRC0001228</a> | Benefits Services       | Ask a Question   | When is Open Enrollment this year?                | Requested        | Cal Oskibear | Carolyn Warfield | 2015-10-19 18:05:56 | 2015-10-22 01:18:10 |
| <input type="checkbox"/> | <a href="#">HRC0001230</a> | Payroll and Timekeeping | Report a Problem | Hibernated too long this year                     | Requested        | Oski Bear    | Cal Oskibear     | 2015-10-19 18:13:38 | 2015-10-19 18:14:54 |
| <input type="checkbox"/> | <a href="#">HRC0001310</a> | Benefits Services       | Ask a Question   | How do I enroll my new cub up for Benefits?       | Work in Progress | Cal Oskibear | Carolyn Warfield | 2015-10-22 01:18:49 | 2015-11-02 15:24:10 |
| <input type="checkbox"/> | <a href="#">HRC0001573</a> | Compensation            | Ask a Question   | How can I get more information about Spot Awards? | Work Completed   | Cal Oskibear | Carolyn Warfield | 2015-11-02 15:26:46 | 2015-11-02 15:29:36 |
| <input type="checkbox"/> | <a href="#">HRC0001229</a> | Payroll and Timekeeping | Service Request  | Extra hours from Cal game                         | Requested        | Cal Oskibear | Carolyn Warfield | 2015-10-19 18:08:46 | 2015-10-19 18:10:00 |

This will group your requests by that option as well as show you a count of how many requests there are under each result. Grouping by Status in the example below shows three requests in **Requested** status, one request in **Work Completed** status, and one request in **Work in Progress** status:



From here, you can click on any of the groups to only see those results in your queue. For example, clicking **Status: Work in Progress (1)** will only show the one request that is in **Work in Progress** status.

You can ungroup the cases by right-clicking on any column header and then clicking **Ungroup**.

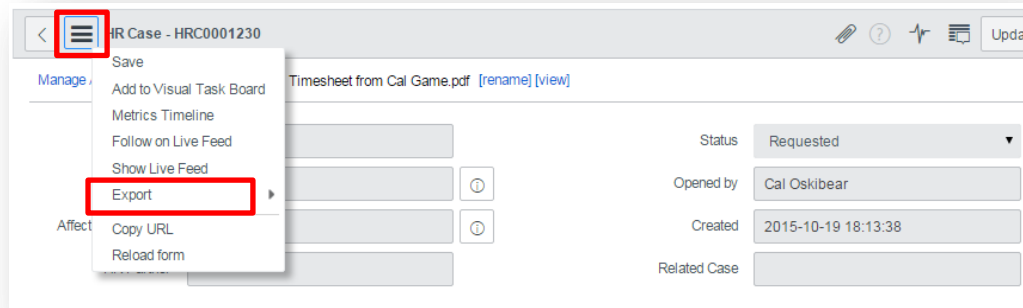


## 4.2 Exporting Your Requests

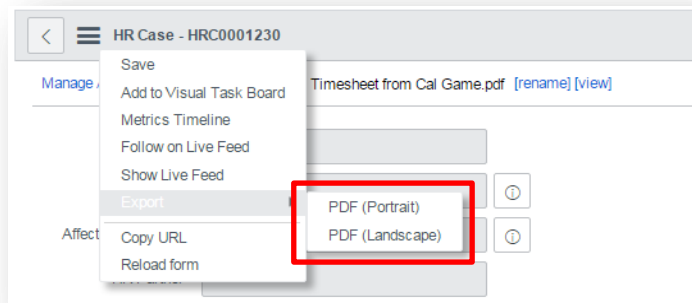
ServiceNow offers you the ability to export your request, either individually (in PDF format) or en masse (in PDF, Excel, or CSV format).

### Exporting a Single Request

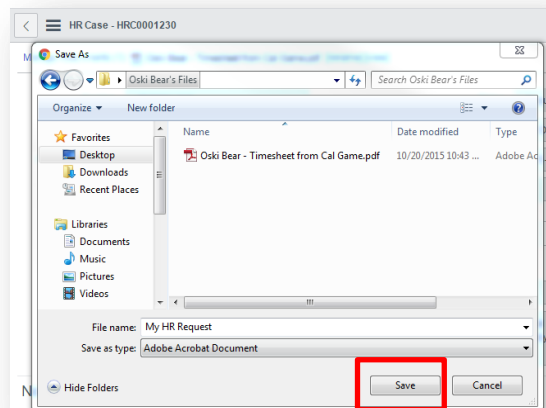
Individual requests can only be exported in PDF format. To export your request, right click on the hamburger icon at the top left of your request and hover over the **Export** option.



This will give you page orientation options for the PDF export of your request: Portrait and Landscape. If you wish for your request's page orientation within the PDF to be Portrait, click on **PDF (Portrait)**. Otherwise, click **PDF (Landscape)**.



This will open up a window that will allow you to save the PDF export to your computer. Choose the appropriate location within your computer to save. Next, name your file. Finally, click **Save** inside the pop-up window to export your request.

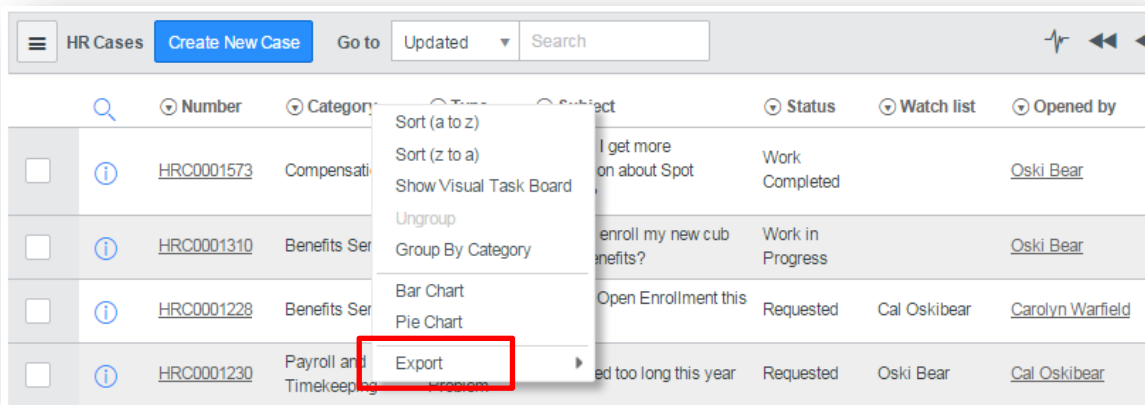


Your exported PDF will show all of the fields that you saw in your request within ServiceNow:

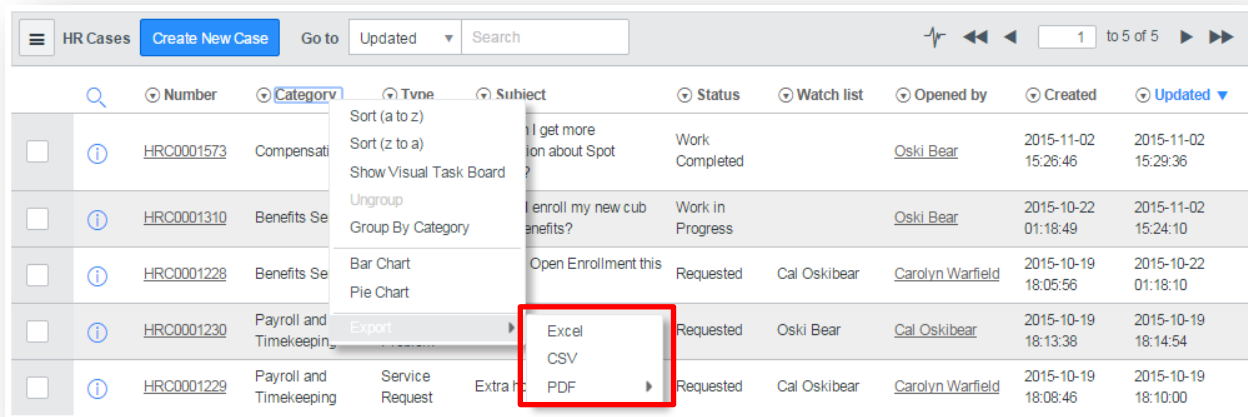
| HR Case   |                         |               |                     |
|---|-------------------------|---------------|---------------------|
| Number:   | HRC0001230              | Status:       | Requested           |
| Submitter:  | Cal Oskibear            | Opened by:    | Cal Oskibear        |
| Affected Employee:  | Cal Oskibear            | Created:      | 2015-10-19 18:13:38 |
| Preferred contact method:   |                         | Related Case: |                     |
| Type:   | Report a Problem        | Watch list:   | Oski Bear           |
| Category:   | Payroll and Timekeeping |               |                     |
| Subject:  |                         |               |                     |
| Hibernated too long this year   |                         |               |                     |
| Description:  |                         |               |                     |
| Hi all, I hibernated a little too long this year and forgot to turn in my timesheet from the last Cal game. Could you help me solve this problem so I get paid for my hard work? My supervisor is copied on the Watch list so that you see I have approval. |                         |               |                     |
| Notes   |                         |               |                     |
| Additional comments:  |                         |               |                     |

### Exporting Your Queue

In addition to exporting individual requests, you can also export your entire queue. To export your queue, right-click on any column header within your queue and hover over **Export**.

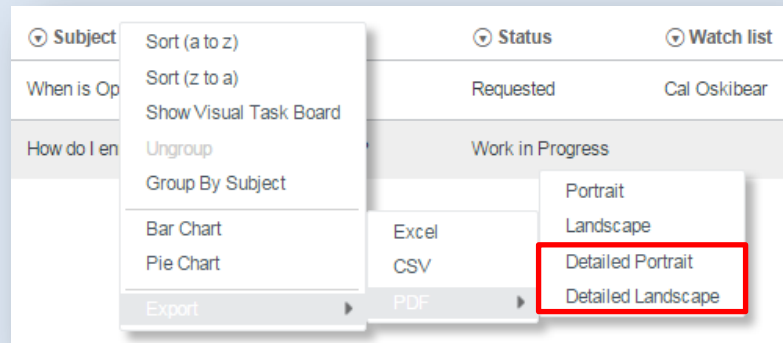


This will give you three options for file types. Unlike individual requests which can only be exported as a PDF, an export of your queue can be saved in Excel, CSV, or PDF format. Click on the one that is most appropriate for your purposes. For example, to export your queue in Excel format, click **Excel**.

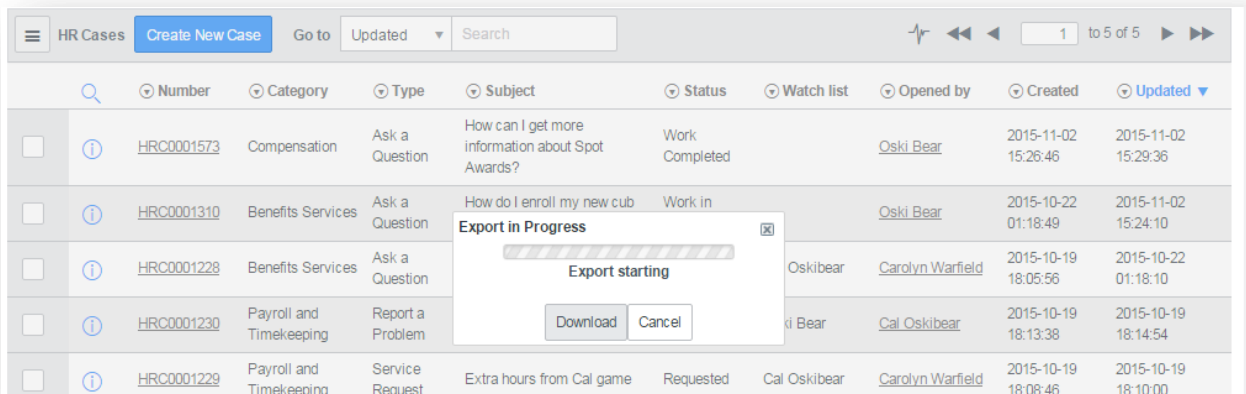


### Quick Tip: Detailed Exports

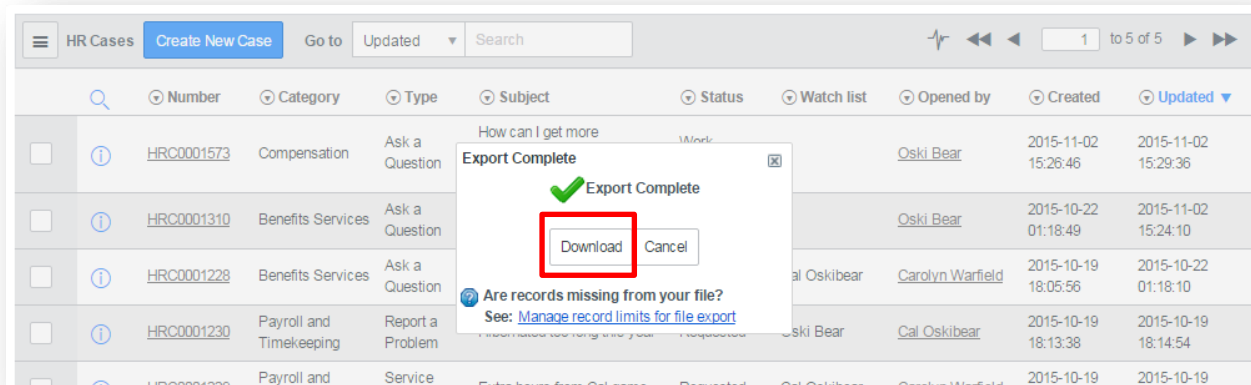
When exporting your queue, hovering over the **PDF** selection in the **Export** dropdown menu shows an additional dropdown menu with four options: **Portrait**, **Landscape**, **Detailed Portrait**, and **Detailed Landscape**. While the **Portrait** and **Landscape** options only export your queue, the **Detailed Portrait** and **Detailed Landscape** options will export your queue and provide you with individual pages for each request shown in the exported queue.



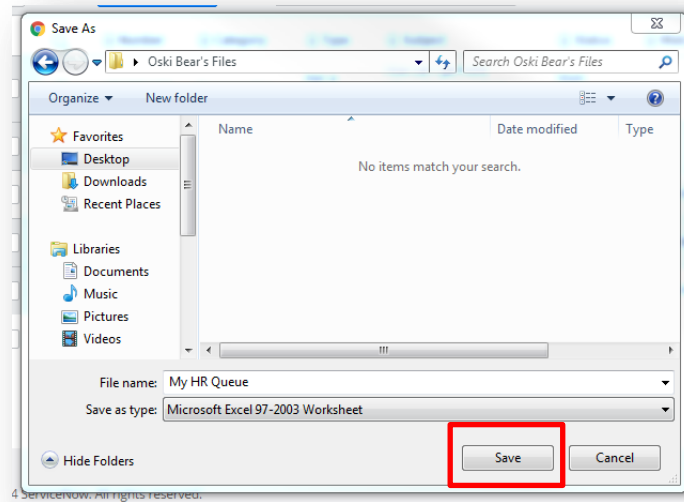
Clicking the appropriate file type will show an **Export in Progress** window as ServiceNow readies your queue for export. This may take a while, depending on how many requests are in your queue.



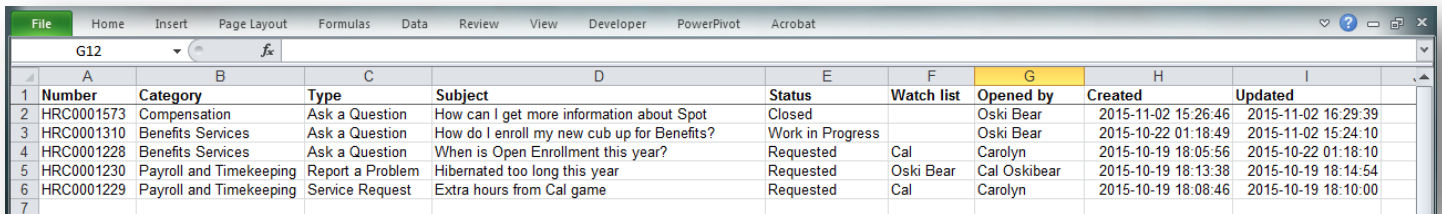
Once it shows the **Export Complete** window, you can now download your export by clicking the **Download** button.



This will open up a window that will allow you to save your export to your computer. Choose the appropriate location within your computer to save. Next, name your file. Finally, click **Save** inside the pop-up window to export your queue.



Your exported file will show all of the information in your queue that you saw in ServiceNow. The below example is an export in Excel format:



|   | A          | B                       | C                | D   | E                | F          | G            | H                   | I                   |
|---|------------|-------------------------|------------------|---|------------------|------------|--------------|---------------------|---------------------|
| 1 | Number     | Category                | Type             | Subject                                     | Status           | Watch list | Opened by    | Created             | Updated             |
| 2 | HRC0001573 | Compensation            | Ask a Question   | How can I get more information about Spot   | Closed           |            | Oski Bear    | 2015-11-02 15:26:46 | 2015-11-02 16:29:39 |
| 3 | HRC0001310 | Benefits Services       | Ask a Question   | How do I enroll my new cub up for Benefits? | Work in Progress |            | Oski Bear    | 2015-10-22 01:18:49 | 2015-11-02 15:24:10 |
| 4 | HRC0001228 | Benefits Services       | Ask a Question   | When is Open Enrollment this year?          | Requested        | Cal        | Carolyn      | 2015-10-19 18:05:56 | 2015-10-22 01:18:10 |
| 5 | HRC0001230 | Payroll and Timekeeping | Report a Problem | Hibernated too long this year               | Requested        | Oski Bear  | Cal Oskibear | 2015-10-19 18:13:38 | 2015-10-19 18:14:54 |
| 6 | HRC0001229 | Payroll and Timekeeping | Service Request  | Extra hours from Cal game                   | Requested        | Cal        | Carolyn      | 2015-10-19 18:08:46 | 2015-10-19 18:10:00 |
| 7 |            |                         |                  |   |                  |            |              |                     |                     |



## Chapter 5 – Frequently Asked Questions

- **How can I tell who's working on my request?**

The Activity section of the request will show the name of the person who most recently worked on your request. Requests may change hands inside CSS HR/APS depending on the work process taking place. All members of CSS HR/APS can see your request.

- **How can I tell what's happening with my request?**

CSS HR/APS Staff are responsible for timely updates to you as progress is made. The Activity section of the request should show the most recent work that has taken place. In addition, you can check the request's status to monitor the current state of the request. See Section **1.2 Your Request Status** for an explanation of what each status means.

- **How do I escalate a request that's urgent?**

When creating an urgent request, place "URGENT" into the subject line. If an ongoing request becomes urgent, please add the term "URGENT" and any additional information into the request's Activity section.

- **Can I still call my HR Partner?**

CSS HR/APS recommends contacting your HR Partner when consultation is needed, particularly when the issue is sensitive or urgent.

- **How do I respond to a request when more information is needed?**

There are two options: First, you can respond via return email if you received an email notification that more information is needed. Alternatively, you can respond inside ServiceNow in the request itself by using the "Additional Comments" field.

- **What if my new request is related to a previous request?**

On the Ask a Question/Report a Problem form, you can enter the previous request number in the following question: "Does this request relate to a previous case? If so, note the case number below." After a request has been created, the **Related Case** field allows you to add a new or change a related case after the form has been submitted.

- **How do I cancel a request?**

Contact CSS HR/APS at (510) 664-9000, x3 to cancel requests.

- **Who can see a request that I open?**

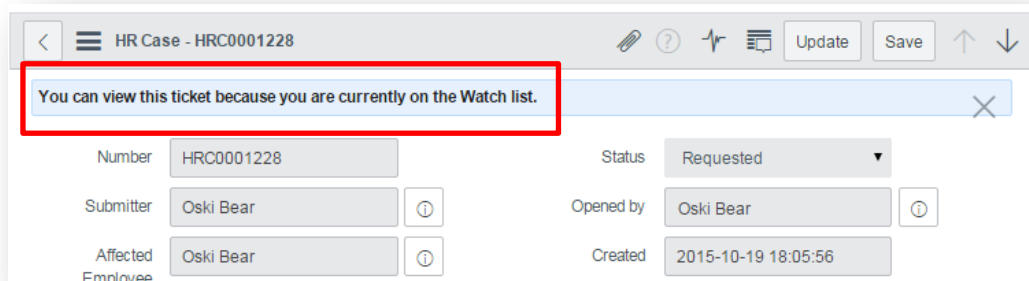
CSS HR/APS Staff can see all requests. Outside CSS HR/APS, only the person who opens or submits the request and those on the Watch List can see your requests.

- **How can I give someone visibility into my request?**

Add that person to the Watch List. See Section **3.4 Adding or Removing Someone to the Watch List** for more information.

- **I didn't open this request. Why do I see it in my queue?**

You're likely on the Watch list for that request. Click into the request and look for a message similar to the one outlined below in red.



- **What email address do ServiceNow emails come from?**

All ServiceNow emails will come from "Service at UC Berkeley", email address: servicenow@berkeley.edu.

- **Why should I attach a form to the ServiceNow request?**

The forms provide information CSS HR/APS needs to begin working on your request. The more information received up front, the more quickly work can be completed.

- **Why doesn't ServiceNow include approvals (e.g., for funding)?**

ServiceNow is being implemented in stages. Future stages will include approvals.

- **Why does my completed request say Work Completed, instead of Closed?**

Every request stays active for five business days after CSS HR/APS completes work. This active period provides you with time to automatically re-open and escalate the request if you're dissatisfied with the service you received. Requests will change to Closed status after five days.

- **I tried searching for someone I know is part of UC Berkeley but I couldn't find them. What's wrong?**

Try a wildcard search. Using an asterisk (\*) at the beginning of your search acts as a wildcard in the search (meaning that the asterisk will substitute as any letter or number). For example, if Cal Oskibear is saved in the system as "Cal B. Oskibear," searching for "Cal Oskibear" might not return the appropriate result. Instead, search for "\*Cal Oskibear." Note that the asterisk (\*) must be at the beginning of the search term in order for the wildcard to work.