~ ROLES YOU NEED TO KNOW ~
• **Submitter** • **Watcher** • **Delegate** • **Approver 1 & 2**

SUBMITTER: Person who submits ServiceNow funding change request.

- **Can edit details of request up until final approval by Approver 2, or rejection** by either Approver 1 or 2.
- **Can add comments** and communicate with anyone involved in case at any time **until case is closed**.
- **Can be either Approver 1 or 2** (if on list), but cannot be *both* Approver 1 and 2.
- If Submitter is also Approver 1, approval process moves from Submitter to Approver 2, bypassing Approver 1.
- **Can be designated as Delegate** of an Approver.
- **Notifications:** Rec, Mod, Comp, Canc, Reop, A/R, YAR, NCom, NC# (see legend below right for abbreviation key)

WATCHER: Person granted view/edit access on a submitted request.

- **Has same edit abilities as Submitters and Approvers.**
- **Can add comments** and communicate with anyone involved in case at any time **until case is closed**.
- **Notifications:** AWL, Mod, Comp, Canc, Reop, NCom, NC#

DELEGATE: Person acting on behalf of Approver that delegates authority to them.

- **Has same abilities as Approver delegating authority.**
- **Notifications:** same as Approvers.

APPROVER 1: Person responsible for INITIAL review, approval or rejection of a request.

- **Can approve or reject a request.**
- **If approved, request goes to Approver 2** for review/action.
- **If rejected, request is automatically cancelled**, and does not go to Approver 2.
- **After approving/rejecting a request, Approver 1 cannot reverse this action.**
- **Can edit request** (or require Submitter to edit request) **until final approval/rejection by Approver 2**.
- **Can add comments** and communicate with anyone involved in case at any time **until case is closed**.
- **Notifications:** AppN

APPROVER 2: Person responsible for FINAL review, approval or rejection of a request.

- **Can approve or reject a request okayed by Approver 1.**
- **If approved, request moves to CSS for final processing,** and edits can no longer be made by anyone involved in the case.
- **If rejected, the request is automatically cancelled.**
- **Can edit a request (**or require Submitter or Approver 1 to edit the request) before granting final approval or rejection.
- **Can edit a request even if already approved by Approver 1.**
- **Can add comments** and communicate with anyone involved in case at any time **until case is closed**.
- **Notifications:** AppN

Legend of Email Notifications for ServiceNow Roles

Request Received – **Rec**	Request Reopened – **Reop**	Added to Watch List – **AWL**
Request Modified – **Mod**	Approved/Rejected – **A/R**	New Comment – **NCom**
Request Completed – **Comp**	Your Action Required – **YAR**	New Case Number – **NC#**
Request Cancelled – **Canc**	Approval Needed — **AppN**	

☺ *TIP!* **Attachments** can be added by Submitter, Watcher, Approver 1 and/or Approver 2. Attachments cannot be removed, once added.

ServiceNow FAQs (Bundle 2: 12-15-16)

for CSS HR/APS

COMMON

QUESTIONS

about

SUBMITTING

REQUESTS

Berkeley Campus Shared Services

1. **Q: I entered a date in the "Start Date" field. Why do I get an error message when submitting the form?** *A: The date format needs to be YEAR-Month-Day (YYYY-MM-DD). Use the calendar button to ensure correct format. This may also happen if your start date is more than 30 days in the past.*

2. **Q: What if an appointment has no end-date?** *A: If an appointment has no end-date, leave the end-date field blank – it is not required.*

3. **Q: When submitting a request for 10 or more employees in my department, whose name do I enter in the "Name of person impacted by the request" field?** *A: Choose one person from your group and enter their name in this field. The "Affected Employee" field will only accept one name. We just need the name for routing purposes.*

4. **Q: How do I choose my Approvers if I don't know who they are?** *A: Only a Gatekeeper can submit requests to add Approvers. Contact your* Gatekeeper *for assistance.*

5. **Q: I do not see the correct Approvers for my department. How do I add them to the Approver 1 or Approver 2 lists?** *A: Only a Gatekeeper can submit requests to add Approvers. Contact your* Gatekeeper *for assistance.*

6. **Q: What do I do if an Approver rejects my request?** *A: You must open a new case and resubmit the request with corrected or updated information.*

7. **Q: How do I enter chartstring changes for future dates?** (i.e. [CHARTSTRING 1] effective 12/1/16 to 1/1/17 [CHARTSTRING 2] effective 1/2/17 to 6/30/17). *A: Submit a separate EDC form for each different start date.*

(more on next page)

ServiceNow FAQs (Bundle 2: 12-15-16)

for CSS HR/APS

COMMON QUESTIONS about SUBMITTING REQUESTS

Berkeley Campus Shared Services

8. **Q: I am submitting a request with multiple Chartstrings. Why do I get an error message when I enter the FTE?** *A: The error message will disappear after all the chartstring changes are entered. The FTE must equal the current FTE of the appointment.*

9. **Q: What is the process for changing multiple EDC's/Chartstrings?** *A: For a detailed outline, please see the Funding Change Forms Job Aid on the ServiceNow Resources for Campus section of the CSS website.*

10. **Q: What form do I use to submit a PET? What does "How many lines does the PET have" mean?** *A: The PET form is available to download from the ServiceNow case. Once you fill out and attach the PET form, indicate the number of data rows you filled out on the PET form in the "How many lines does the PET have?" text box. (This is an optional field.)*

11. **Q: How should I submit earnings distribution changes with new distributions?** *A: When changing the distribution for an appointment, only enter the desired future state of the appointment distributions in the form.*

12. **Q: Can I correct errors or update details after submitting my Funding Change Request?** *A: You can make changes up until Approver 2 approves the request. Once case status is "Approved," changes can no longer be made. To cancel a request due to error, call Campus Shared Services: 510-664-9000 x3.*

13. **Q: I have submitted many funding change requests and it is hard to review them in the "My HR Requests" list. Can I sort/filter them?** *A: Yes, you can sort your requests. Choose the column you would like to sort by, and click the three line "hamburger" icon. It will give you the option to sort alphabetically, by group, or show in a visual chart. (For details, see Custom Filters for Approvers Job Aid)*

ServiceNow FAQs (Bundle 2: 12-15-16)

for CSS HR/APS

COMMON

QUESTIONS

about

APPROVING

REQUESTS

Berkeley Campus Shared Services

1. **Q: How do I approve a request?** *A: See [Approving from Your Home Page Job Aid](#) on the [ServiceNow Resources for Campus](#) section of the CSS website. Cases needing your approval can be accessed under the "All My Tickets" option by selecting "My Approvals" at this URL:* https://berkeley.service-now.com/ess/

2. **Q: I am submitting a request, but I am also an Approver. How should I enter Approver 1 and 2 on the form?** *A: List yourself as Approver 1 (or 2). If you are not listed as an Approver, contact your [Gatekeeper](#) to be added to the list.*

3. **Q: What steps must an Approver take when rejecting a request?** *A: The Approver must specify the reason for rejection. Click on the "Post" button to post your comment, then click on the "Reject" button. To see your posted comment, you will have to log into ServiceNow.*

4. **Q: How do Approvers know if they are an Approver?** *A: Approvers will appear on the Approver list, visible by clicking on the magnifying glass icon in ServiceNow.*

5. **Q: Can anyone request to be an Approver 1 or Approver 2?** *A: No, only a Gatekeeper can determine who will be an Approver. If you want to be an Approver, contact your [Gatekeeper](#) for assistance.*

6. **Q: How do I assign/remove an Approver delegate?** *A: See the [Managing Approval Delegations Job Aid](#) on the [ServiceNow Resources for Campus](#) section of the CSS website.*

7. **Q: As an Approver Delegate, where will I see the Funding Changes that I need to approve?** *A: Cases that need your approval can be accessed from the "All My Tickets" option, available by selecting "My Approvals" at this URL:* https://berkeley.service-now.com/ess/