ServiceNow for CSS HR/APS

Reviewing & Editing an Expense Distribution Change Request

Navigating to your Home Page

**Step 1:** Go to [http://berkeley.service-now.com/ess](http://berkeley.service-now.com/ess) (you’ll be asked to CalNet Authenticate). The ServiceNow Home page shown below will appear.

**Step 2:** Click on My Approvals (below All My Tickets) and your Approvals list will appear.

The Approvals list (screenshot below) displays:
- the current State of the request
- the type of Case in which approval action is being requested
- the name of the Approver
- any Comments made by the Approver
- the Approval Case #
- the request Created date.

The State of an approval case may be:
- **Requested:** You have not yet acted upon this approval request.
- **Approved:** You have approved this request and moved it forward in the process.
- **Rejected:** You have rejected this request and halted the process.

For additional resources visit [http://sharedservices.berkeley.edu/hr-aps-sn-resources](http://sharedservices.berkeley.edu/hr-aps-sn-resources)

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Step 3: To take action on an approval request click on the word “Requested” in the row of the request you wish to take action on.

![Requested Case](image)

Step 4: Double click on the Information Icon next to the Case Number (below the action buttons in the upper right corner.) This will open the HR Case view, where you can review and edit the case detail.

![Case View](image)

Note:
Approver 1 may drill down into a Funding Change Request to see more detail and make edits until Approver 2 has Approved or Rejected a case.
Approver 2 may drill down into a Funding Change Request to see more detail and make edits until CSS has started work on the request.
ATTENTION: You can see the current chartstring data by looking in the Notes section of the case by scrolling to the bottom of the case activity log. This section will contain the name of the person who completed the original EDC request form, and the current state chartstring data. (See picture below).

![Table Example](image)

ATTENTION: The case activity log (located in the Notes section of the HR case) captures all actions and comments made by those with access to a case in ServiceNow. This log is a rich source of information. It is important that individuals involved with a case document their questions and rational for action in the activity log so others reviewing the case can understand the “story” of the case. An excerpt from a case activity log is pictured below.

![Activity Log Example](image)
**Step 5:** The HR Case Funding Changes window will appear. Scroll down to the **Funding Changes** section of the window (pictured below, several sections down). If this is an 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 applicable) 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.

**Step 6:** If you have no changes and are ready to Approve or Reject the case, click the Back arrow to return to the previous window and click the appropriate button.
**Step 7:** If you wish to make changes to the case data, click on the date in the **Start Date** column. Clicking the date will take you to the **HR Funding Items** window where you can make edits.

In the **HR Funding Items** window, you can edit **Dates, Distribution %, Budgeted FTE, Friendly Name, New Chartstring, and Earn Code** fields by clicking directly into the field and editing.

**Step 8:** After making desired edits, click on the **Update** button to save your work and return to the previous window.
Step 9: Scroll down to the Additional comments field in the Notes section and document why you made the edits to the EDC Request.

ATTENTION: All comments and notes should be made in the “Additional comments” section of the HR Case Funding Changes record. Comments made in the Approval Case view do not link to the overall HR Case Funding Changes record. For the “whole comment story” to be available to all interested parties, comments should be made only in the HR Case Funding Change record.

It can be confusing to know if you are in the "Approvals" view or the “HR Case Funding Changes” view as they look similar. However, you can easily identify which view you are in by checking the upper left corner of the screen. If you are in Approvals view it will read “Approval – HRCXXXXXX”.

The HR Case will read "HR Case Funding Changes – HRCXXXXXX". Note both views will have the same HRCXXXXXX number.

!!!Only make comments in the “HR Case Funding Changes – HRCXXXXXX” view!!!
Step 10: 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.

![Update button](image)

Step 11: Scroll to the top of the window and click the **Home** button to return to your **My Approvals** list.

![My Approvals](image)

After you have Approved a case, the **State** of that case will change in your approval list from “Requested” to “Approved”.

If you have Rejected a case, the State will change from “Requested” to “Rejected.”

Clicking on the State of a case (**Requested**, **Approved**, **Rejected**) will open the case for you to peruse.

For additional resources visit
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