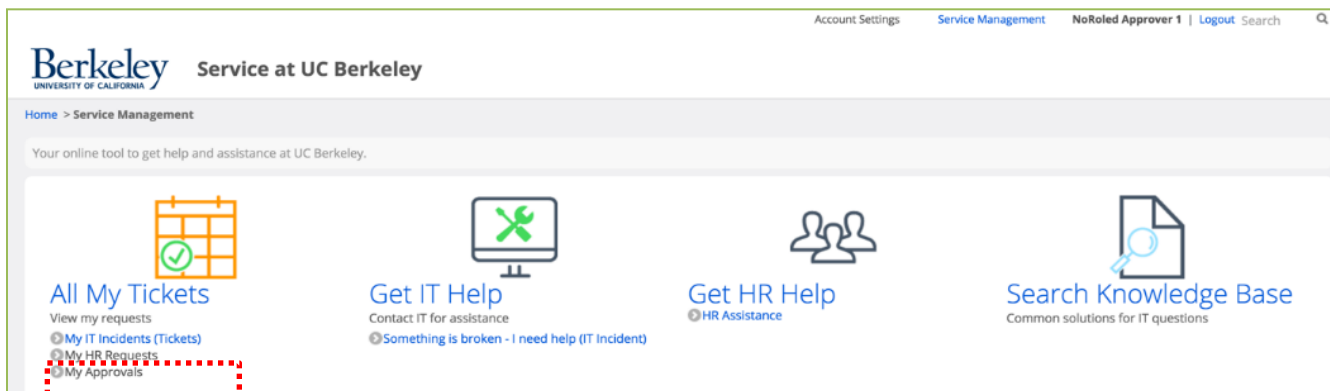


Reviewing & Editing an Expense Distribution Change Request

Navigating to your Home Page

Step 1: Go to <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:

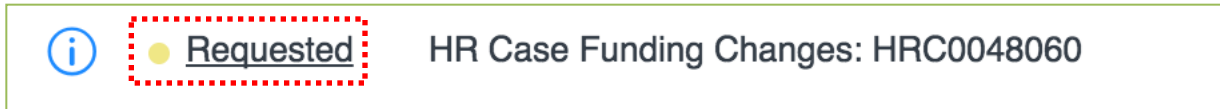
- **Requested:** You have not yet acted upon this approval request.
- **Approved:** You have approved this request and moved it forward in the process.
- **Rejected:** You have rejected this request and halted the process.

State	Approving	Approver	Comments	Approval for	Created
Approved	HR Case Funding Changes: HRC0048061	NoRoled Approver 1		HRC0048061	2016-10-24 10:24:25
Requested	HR Case Funding Changes: HRC0048060	NoRoled Approver 1		HRC0048060	2016-10-24 10:22:11
Rejected	HR Case Funding Changes: HRC0048059	NoRoled Approver 1	2016-10-24 11:58:31 - NoRoled Approver 1...	HRC0048059	2016-10-23 13:40:50

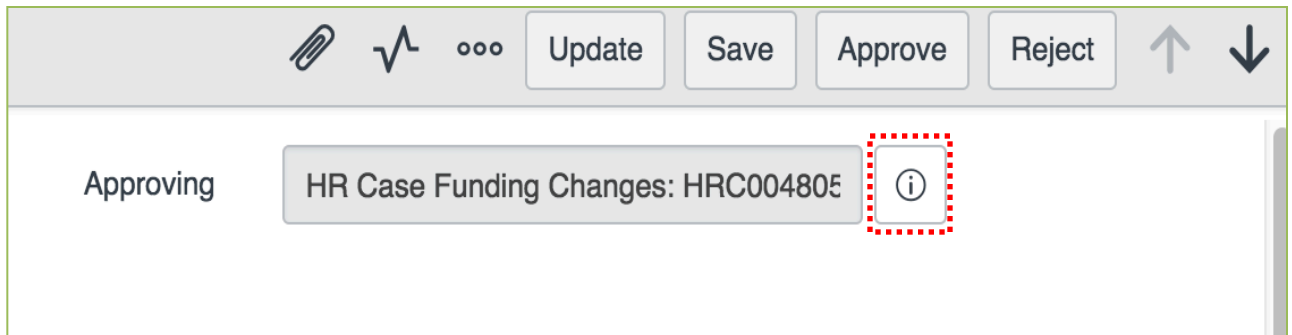
ServiceNow for CSS HR/APS

Reviewing and Editing an EDC (continued)

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.



Step 4: Double click on the Information Icon (i) 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.



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.

ServiceNow for CSS HR/APS Reviewing and Editing an EDC (continued)

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).

Lyle Hendricksen
2017-02-15 13:09:01

For easy reference, you can compare the appointment and chartstring information shown here (current state) with that contained in this funding change request (future state).

Record selected: 0 | 4163U | Trainer 3 | AZADM | Javier Rodriguez

Start Date	End Date	Dist %	Earning Code	Budgeted FTE	Chartstring
Thu Sep 01 2016	-	100	REG	0	1-51210-69799-32478-72--

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 rationale 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.

Notes

Additional comments

Activity

Adam Berke
2017-02-15 13:17:46

This is an example of notes added to a funding change approval case.

Lyle Hendricksen
2017-02-15 13:09:03

Case Approval Decision	Requested	was Not Yet Requested
Status	Awaiting Approval	was Requested
Approval 1 Decision	Requested	

ServiceNow for CSS HR/APS Reviewing and Editing an EDC (continued)

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.

Funding Changes
▼

PET Priority:

Number of Lines:

PAN Confirmation Emails:

Funding Change Type:

Record Number:

Reflect Change in Position Management:

Position Number:

Earnings Distribution Details
Go to:
◀◀ 1 to 1 of 1 ▶▶

HR Funding Items

	Start Date	End Date	New Chartstring	Distribution %	Budgeted FTE	Earn Code	Friendly Name
<input type="checkbox"/>	2016-12-08		1-51231-07427-10004-72	49		REG	

Actions on selected rows...
 ◀◀ 1 to 1 of 1 ▶▶

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.

ServiceNow for CSS HR/APS Reviewing and Editing an EDC (continued)

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.

Funding Changes

PET Priority:

Number of Lines:

PAN Confirmation Emails:

Funding Change Type:

Record Number:

Reflect Change in Position Management:

Position Number:

Update Save

Earnings Distribution Details Go to Search 1 to 1 of 1

	Start Date	End Date	New Chartstring	Distribution %	Budgeted FTE	Earn Code	Friendly Name
<input type="checkbox"/>	2016-12-08		1-51231-07427-10004-72	49		REG	

Actions on selected rows... 1 to 1 of 1

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.

HR Funding Items - HRFI0001626 Update Save

Number:

Start Date: End Date:

Distribution %:

Budgeted FTE:

Friendly Name: * HR Case Funding Changes:

New Chartstring:

Earn Code:

Activity:

LH Lyle Hendricksen 2016-10-25 09:24:01

Distribution % 100

Earn Code REG

End Date 2017-12-31

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

Start Date 2016-11-01

Update Save

ServiceNow for CSS HR/APS Reviewing and Editing an EDC (continued)

Step 9: Scroll down to the Additional comments field in the Notes section and document why you made the edits to the EDC Request.

Notes ▼

Additional comments

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.

Home > My Approvals

Manage approval requests.

Approval - HRC0077250

HR Case Funding Changes - HRC0077250

You can view this ticket because you are currently on the Watch list.

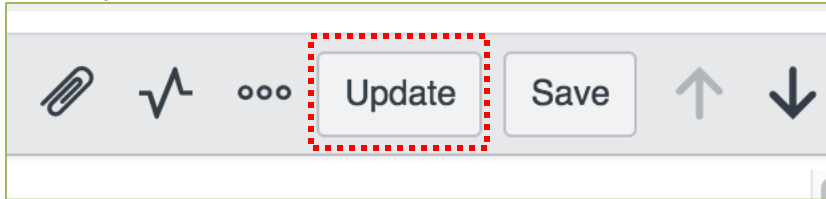
Number: HRC0077250

Submitter: George Noble


!!!Only make comments in the “HR Case Funding Changes – HRCXXXXXX” view!!!

ServiceNow for CSS HR/APS Reviewing and Editing an EDC (continued)

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.



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



Service at UC Berkeley

Home > **My Approvals** For additional resources visit
<http://shareservices.berkeley.edu/hr-aps-sn-resources>

Manage approval requests.

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.”**

Approvals for text Search Grid Split						
All > Approver = NoRoled Approver 1						
<input type="checkbox"/>	<input type="checkbox"/>	State	Approving	Approver	Comments	Approval for
<input type="checkbox"/>	<input type="checkbox"/>	Approved	HR Case Funding Changes: HRC0048061	NoRoled Approver 1		HRC0048061
<input type="checkbox"/>	<input type="checkbox"/>	Requested	HR Case Funding Changes: HRC0048060	NoRoled Approver 1		HRC0048060
<input type="checkbox"/>	<input type="checkbox"/>	Rejected	HR Case Funding Changes: HRC0048059	NoRoled Approver 1	2016-10-24 11:58:31 - NoRoled Approver 1...	HRC0048059

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

For additional resources visit
<http://shareservices.berkeley.edu/hr-aps-sn-resources>