

# ServiceNow Documentation

## Geneva

### Geneva Human Resources application

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# HR Service Management

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The ServiceNow® HR Service Management application automates standard HR processes within your organization. This automation eliminates the number of checklists, email exchanges, and phone calls performed by the HR team. Employees can access HR services, streamlining their HR request processes. These requests are tracked and progress is monitored.

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## Understanding HR Service Management

HR Service Management benefits your enterprise by automating standard HR processes within your organization that support relationships between employees and the HR department.

The HR Service Management application is available as a separate subscription.

## Who uses HR Service Management?

The enterprise HR department uses the HR Service Management application. An enterprise HR department is composed of many areas, such as employee relations, benefits administration, policy enforcement, recruitment and employment, and performance management. The members of a large HR organization typically include:

- HR specialists who specialize in one or more HR disciplines. For example, the benefits area has specialists in insurance administration, leave and vacation time, and employee stock purchase.
- HR generalists who work with a business group or in a geographical region to assist employees with questions, careers, performance management, and other employee relations requests.
- HR managers who monitor and measure the effectiveness of the HR group in supporting employees across the organization. They also ensure that the enterprise is compliant with federal, state, and local regulations.
- HR systems administrators who configure and maintain systems such as the central employee database, payroll, learning and performance management system, and others, including the Human Resources application.

## How do you use HR Service Management?

The HR Service Management application enhances and supports your enterprise. The relationships between your employees, IT, and the HR department are supported in numerous ways:

- Employees can use the HR Service Portal or catalog to submit questions and other requests to the HR department.
- If you use the Connect Support feature, employees can chat with an HR agent who is monitoring the HR chat queue. See [Connect Support](#).
- HR staff can create, manage, and view HR cases to answer questions and process the requests that employees submit.
- HR managers can run reports and view overview information to monitor and manage work done by the HR department.
- HR and corporate IT administrators can more effectively manage the company HR systems, such as the payroll and performance management systems, through the Enterprise Configuration Management Database (ECMDB).

## How do you benefit from HR Service Management?

Your entire organization benefits by using the application in the following ways:

### **Automates standard HR processes**

Several typical HR processes are automated. This automation reduces the number of checklists, email exchanges, and phone calls performed by the HR team.

### **Improves employee access**

Employees access HR services through a service catalog, rather than having to write individual emails, make phone calls, or personally visit HR for each request.

### **Tracks requests and progress**

HR managers use reports and views to help them understand the work their staff is performing to support the company. Employees can see the status of their requests.

**Integrates with other services**

Human resources processes can include both HR tasks and tasks for other teams, to provide significant service delivery improvements.

**HR Service Management terminology**

The following terminology is used for the application.

Term	Definition
HR Criteria	Way to select groupings of HR and System users based on criteria
HR Services	List of HR Services
HR Topic Categories	List of HR Service Topic Categories
HR Relationships	User relationships with each other
HR Positions	Positions available in company table
HR Assignment Tier Definition	Specifies escalation hierarchy
HR Group Roles	List of groups that have HR group roles
HR Email Scripts	List of all HR email scripts
HR User Roles	List of users who have HR user roles
HR Templates	Templates for Case record creation based on catalog item
Client Role Rules	Specifies the rules to generate client roles
HR Topic	DetailsList of HR Service Topic Details
HR Service Options	List of HR Services options that affect case creation
HR Departments	Departments available in company table
HR Locations	Locations available in company table
HR Chat Queues	List of HR chat queues
HR Surveys	Surveys used by HR application
HR Links	External links used by HR application
HR Properties	System properties used in HR Application
HR Email Templates	List of all HR-related email templates
HR Knowledge Bases	Knowledge bases used by HR application
HR Knowledge Articles	Knowledge articles used by HR application
HR Notifications	Email notifications used by HR application
HR Service Catalog Categories	Service catalog categories used by HR application
HR Service Catalog Items	Service catalog items used by HR application

Term	Definition
HR Document Templates	Document templates for document content used in HR application
HR Groups	Groups used by HR users
HR Skills	Skills available to company users
HR Roles	Roles used by HR users
HR Benefit Provider / Plans	Benefit providers and plans used by HR Benefits service
HR Benefit Type	Benefit types used by HR Benefits service
Disciplinary Issue Types	Disciplinary issue types used by HR Employee Relations service
Disciplinary Warning Types	Warning types used by HR Employee Relations service
HR System Report Frequencies	System Report Frequencies defined for HR Systems Service
HR System Report Types	HR System Report types used by HR System service

## Human Resources getting started

As a member of the human resources (HR) organization, you interact with HR Service Management to assist employees.

The following describes how employees and HR staff interact with the HR Service Management application.

### Employees

Submit questions to or make a request of HR. An HR case is opened. For more information, see [Self-Service HR portal](#) on page 87.

### Specialist, generalist, agent

Answer questions related to your area of expertise. Initiate and manage HR processes, such as onboarding a new employee. For more information, see [HR cases](#) on page 86.

### HR administrator, such as the benefits administrator

Produce and maintain HR-related documentation, such as employee manuals, policies, and benefits information. Provide support for escalated questions or issues. For more information, see [Human Resources knowledge management](#) on page 85 and [HR cases](#) on page 86.

### HR manager

Monitor and track the effectiveness of HR assistance, for example, by reporting on the response time to inquiries. Provide support for escalated questions or issues. For more information, see [Human Resources management](#) on page 106.

**Administrator, may be a dedicated IT resource** Maintain HR systems, such as the employee database, learning and performance management system, or payroll system. The Human Resources application is another HR application that must be configured to meet your organization's HR process requirements. The Configuration Management application can be used to manage the maintenance and life cycle of these HR systems.

For more information about how to implement the Human Resources application, see [HR implementation guide](#) on page 8.

## HR implementation guide

To implement the HR Service Management application, HR management works with IT staff to set up HR data and configure the application to work with the organization's HR processes.

The following topics provide planning, configuration, and implementation guidelines for a successful rollout to your organization.

### HR and IT implementation team

Begin by assembling the team of HR staff who can make decisions about the configuration of the application and the IT staff who can configure the application.

On the implementation team, include HR and IT staff who can handle the following responsibilities.

<b>HR project manager</b>	The project manager understands the department systems and processes, and will be responsible for the timeline, budget, communications, and so on.
<b>HR IT administrator</b>	This is typically someone who manages existing HR systems and who will manage the configuration of the Human Resources application.
<b>HR managers</b>	Managers who represent different HR functions, such as benefits, payroll, and employee relations.
<b>Other stakeholders</b>	Others who must give approval, provide input, or sign off for a successful implementation. For example, the training organization.

### HR implementation decisions

With the HR implementation team, make decisions about system configuration.

As a team, discuss the following topics. You may need help from your ServiceNow account manager or from other internal groups for some of the discussions.

<b>Integration</b>	If you have an existing HR employee database, such as Workday, decide whether to integrate it with the HR profile database. You can activate a Workday plugin to import HR employee data and keep the two systems synchronized.
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	<p>If you use a different system, you may need to use professional services to help with integration.</p>
<b>Process flow</b>	<p>Decide whether to use <a href="#">state flows or workflows</a> to drive the process for resolving HR cases.</p>
<b>HR knowledge bases</b>	<p>Determine whether to set up HR knowledge bases prior to rollout, meaning you have HR documents available through the knowledge base before employees begin submitting HR cases.</p> <p>An important benefit of the HR system is the Human Resources knowledge base that can contain policies, benefits, holiday schedules, and so on. When an employee submits a case, the knowledge base is searched based on keywords the employee is entering in the short description. With a detailed knowledge base, the question may be answered without the need to submit the case.</p> <p>You can also define multiple HR knowledge bases for different sets of employees. For example, create one knowledge base for U.S. employees and another knowledge base for Mexico employees because policies, holidays, and so on, may be different.</p>
<b>Assignment of HR cases and tasks</b>	<p>Determine how you are going to assign HR cases and tasks to HR agents. Review the following information to understand the assignment process and become familiar with predefined items and options.</p> <ul style="list-style-type: none"><li>• <a href="#">How HR cases and tasks are assigned</a> on page 13</li><li>• <a href="#">User groups installed with HR Service Management</a> on page 25</li><li>• <a href="#">HR skills installed with HR Service Management</a> on page 32</li><li>• <a href="#">HR Catalog items installed with HR Service Management</a> on page 33</li><li>• <a href="#">Configure HR Service Management</a> on page 36</li></ul>
<b>Current HR processes</b>	<p>Outline important HR processes such as your organization's onboarding and offboarding processes. Compare the processes to those that are predefined with the Human Resources application, and identify how the predefined processes must be modified. Identify other processes you must configure.</p>
<b>Service level agreements (SLA)</b>	<p>Decide how long different types of HR cases should take to resolve, and use this info to define HR service level agreements (SLAs) for tracking the effectiveness of your HR processes.</p>

## HR rollout

As part of the planning process, determine how you will roll out HR to employees, and what training is needed. Consider the following questions.

- Will you roll it out to groups of employees in phases?
- Will you roll out parts of it in phases? For example, in the first phase, all employees can submit simple HR inquiries. The second phase includes training and implementation of the automated processes, such as onboarding and offboarding.
- How will you get employees excited about the new HR process so they will want to use it?
- What training will each type of user, such as those listed below, need?
  - End users who submit HR requests
  - HR agents who work on cases
  - HR approvers who need to respond in a timely manner
  - HR managers who want to track and monitor HR case activity
  - Other stakeholders not listed

## State flows vs. workflows

One configuration setting available for the HR Service Management application is whether to automate state flows. If you do not automate state flows, you can manually change the state of HR cases as work is completed, or use workflows to automate the processes.

### Definitions

#### State flows

State flows customize transitions from one state to another in tables derived from the Task [task] table. The system is configured to perform work during transitions to specific states. An example of a state transition is when the **State** field in a case changes from the **Assigned** state to **Work in Progress**.

When you create a state flow, the system automatically replaces the usual programming elements that control task states with customizable business rules, client scripts, and UI actions that give you a wide range of processing options. You can configure custom state transitions to occur automatically or manually and in any order. You can create business rules and UI actions that only appear and take effect for certain states.

#### Workflows

A workflow provides the same customization of processes, however, workflow activities can be based on triggers other than state changes. If you

use a workflow, you define activities to change the state but can include other activities such as setting a timer for an action to be taken, adding messages to the activity stream, and initiating another workflow.

You create and modify workflows in the Workflow Editor, where the entire workflow is represented graphically in one screen, as shown in this example HR workflow:

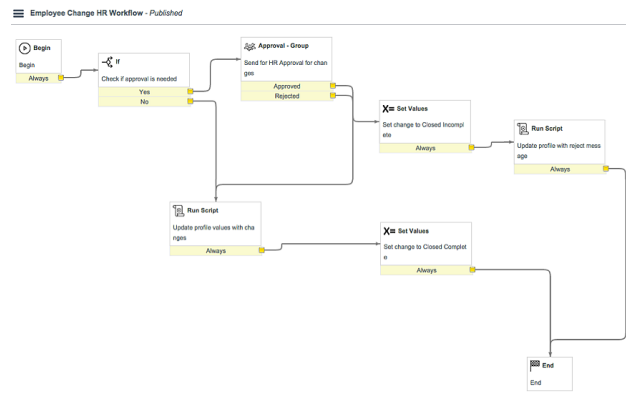


Figure 1: Example HR workflow

## Understanding the state flows and workflows installed with HR

When HR Service Management is activated, both state flows and workflows are installed. State flows are enabled by default in **Human Resources > Administration > Configuration**.

The following processes have defined workflows:

**Employee Change HR Workflow**

Checks first whether an approval is needed. If no approval is needed, or when approval is obtained, the profile is updated and the case is closed. If a change is rejected, the case is closed incomplete.

**Employee Onboarding HR Workflow**

Automatically creates an HR profile and sends approval request. When approval is obtained, creates the user record, sends a welcome email template to the new employee's manager, and initiates the Employee Onboarding HR Tasks workflow. When tasks are complete, closes the case. If the onboarding case is rejected, the case is closed incomplete and the HR profile is marked inactive.

**Employee Onboarding HR Tasks**

When initiated by the onboarding workflow, creates onboarding tasks and assigns them as specified in the properties of each task.

**Employee Offboarding HR Workflow**

Sends approval request. When approval is obtained, initiates the Employee Offboarding HR Tasks workflow. When termination date is reached and tasks are closed, HR profile and user records are set to inactive.

**Employee Offboarding HR Tasks**

When initiated by the offboarding workflow, creates offboarding tasks and assigns them as specified in the properties of each task.

**HR Case User Acceptance**

After an HR agent completes a case, notifies the user to review and accept or reject the resolution. If the user accepts the resolution or does not respond within two business days, closes case. If the user rejects the resolution, notifies the HR agent.

You can view the state flows by navigating to **Human Resources > State Flows**. Each state flow indicates the starting and ending state when the state flow is processed. If you are just beginning to use HR, you can leave state flows enabled and if the workflows are not modified they will work with state flows without conflicts.

## How HR cases and tasks are assigned

Understanding how HR agents are assigned to HR cases and tasks is important because it will help you set up auto-assignment to work as expected.

This diagram illustrates the hierarchy of the assignment process.

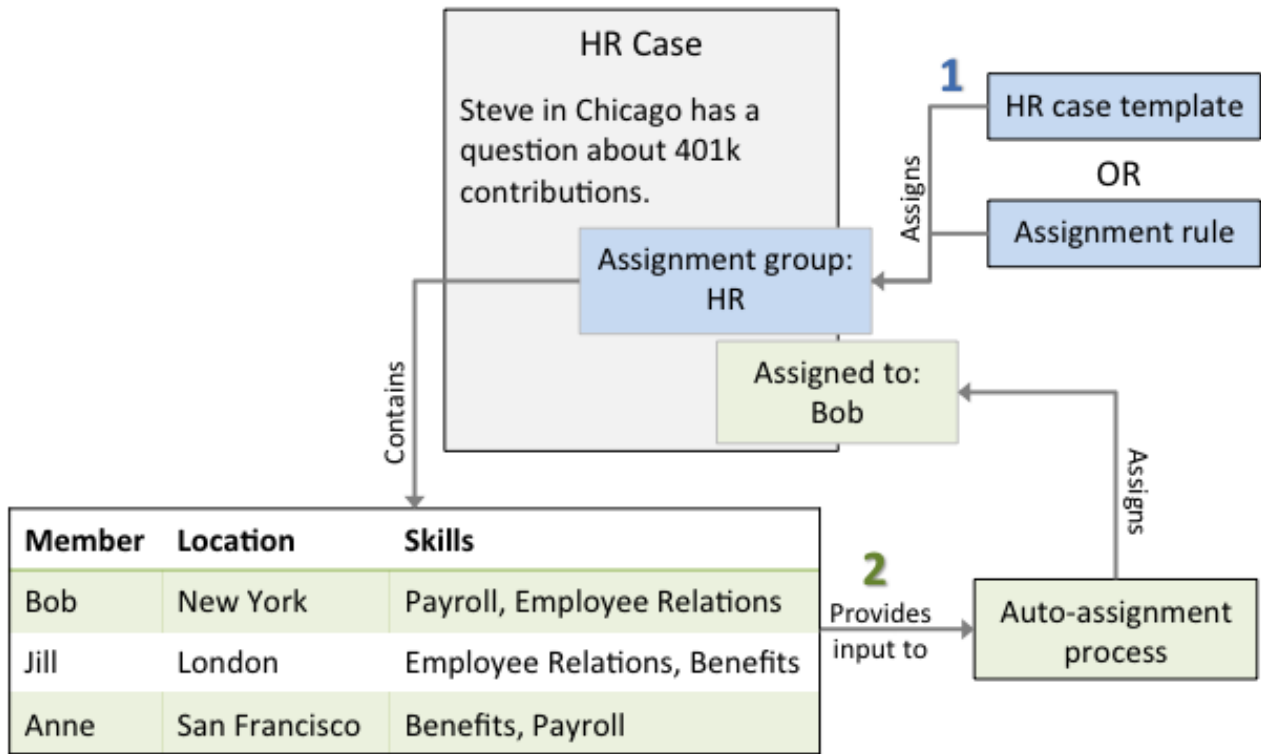


Figure 2: HR assignment process

1. When the HR case is entered, an HR group is assigned from the HR case template or from an assignment rule. The HR case template assigns the group during case entry, before the case is submitted. An assignment rule assigns the group when the case is submitted, if the assignment group is empty.
2. When the case is submitted, the auto-assignment process evaluates the time zone, location, and skills of each member of the assignment group, depending on which configuration options are enabled. It also evaluates the workload, or number of cases assigned to each user. It assigns the closest matching assignment group member based on workload.

The following predefined items support HR case and task assignment.

Table 1: Predefined HR items

Item	Description
HR groups	Several <i>HR groups</i> are predefined, including <b>HR</b> , which is intended to contain all HR staff members.

Item	Description
HR case templates	<p>Case templates are used to create catalog items. A number of predefined catalog items are provided for common HR requests, such as tuition reimbursement and 401k questions. Most HR case templates assign <b>HR</b> as the assignment group.</p> <p>There are also HR task templates that are associated with the catalog items to create tasks for fulfilling HR cases. Both case and task templates can specify the assignment group.</p>
Assignment rules	A predefined assignment rule assigns <b>HR</b> as the group when an HR case is submitted and there is no assigned group.

The following auto-assignment options are configured in the HR Configuration module.

**Table 2: HR Configuration auto-assignment options**

Option	Description
Auto-selection of agents will consider time zone for tasks	HR tasks are individual pieces of work that must be completed to resolve the HR case. HR tasks can be assigned to a time zone; if you assign a time zone, you can use the time zone of the task and the HR agent's location to auto-assign the agent.
Auto-selection of agents will consider location of agents.	If the organization is spread across two or more locations, and each has an HR team, you can use the HR agent's location. For example, a vacation question from an employee in Germany is assigned to a member of the Benefits group in the Berlin office.
Auto-selection of agents for tasks requires them to have <b>[all]</b> <b>[some]</b> <b>[none]</b> skills	Within a group, HR agents may specialize in an area. For example, on the Benefits team, some agents may know more about medical claims or leave requests. You select from <b>[all]</b> <b>[some]</b> <b>[none]</b> based on whether you assign and maintain HR skills.

## HR implementation information required

After deciding how to configure the HR Service Management application, obtain lists of the information to input or import into HR modules.

Obtain these lists from existing systems or databases, or ask department heads to compile the list of information for their department. Use the information as outlined to develop lists that are ready for input into the Human Resources application.

1. Gather the following information.

- List of positions within your organization.
- HR areas of expertise, for example, benefits, payroll, policies, and so on.

2. Use the list of HR areas of expertise to compile the following lists.

**HR roles**

Roles identify the parts of the system that each user can access.

Typically, users are placed in groups and then roles are assigned to groups. Every user in a group receives the permissions assigned to the group. Several roles are predefined for you, such as HR admin, specialist, and generalist roles. Review the predefined roles and identify new roles you need to add.

**HR groups**

The **HR** group is predefined to contain all HR users. Identify the additional groups you need. You can often start with a list of the email groups defined in your organization. You can assign roles to a group, and every member added to the group is assigned the associated roles.

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**Note:** HR groups can be set up in a hierarchy. A user assigned to a child group gets the roles assigned to the parent and child groups.

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**HR skills**

Compile a list of skills that HR users may have. These can be for areas of expertise and other skills, such as foreign languages spoken. You can assign skills to both groups and users. As with roles, skills assigned to groups are assigned to every member of the group.

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**Note:** HR skills can be set up in a hierarchy. A user assigned to a skill receives the skill and all skills that are contained by it.

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3. Obtain a hierarchical list of HR users. For each user, identify the following information. The list will be used as an input document for the HR implementation.

- User's HR group membership
- User's HR skills
- If a user will not assigned as a member of a group, a list of HR roles to assign to the user
- User's location, if applicable
- Whether the user should approve HR cases. For example, a region's HR generalist may need to approve offboarding HR cases.

4. Outline any articles to include in the knowledge base, and the source of the information for each article.



## Human Resources configuration

Use the configuration checklist to help you set up HR Service Management for your organization.

It may take some time to complete all configuration items. Most of these items can be done concurrently; exceptions are noted. If it takes several months to complete implementation, review the information entered during the initial configuration tasks and update it to reflect any changes.

**Table 3: Configure HR Service Management**

#	Configure
	<p>Enter or import the following information before importing user HR profiles.</p> <ul style="list-style-type: none"> <li>• <a href="#">Positions</a></li> <li>• HR groups. Include HR as a prefix in your group name so HR groups are easy to search for.</li> <li>• <a href="#">Skills</a></li> </ul>
	Set <a href="#">configuration options</a> .
	Populate the employee HR profile database, as determined during the decision phase.
	Assign roles to HR groups and staff. Be sure to assign hr_approver_user to anyone who approves cases.
	Assign skills to <a href="#">HR groups</a> and <a href="#">staff</a> .
	Create any <a href="#">HR templates</a> and <a href="#">catalog items</a> you need for the HR catalog. These are for the additional processes you identified during the planning phase.
	<p>Review the installed HR case and task state flows and <a href="#">customize</a> as needed.</p> <hr/> <p><b>Note:</b> If you are managing cases manually or with workflows, you can <a href="#">disable state flows</a>.</p> <hr/>
	Review the installed HR workflows and edit or create new workflows as needed.
	Review and configure <a href="#">assignment rules</a> .
	Review and configure notifications. You can customize the text of existing notifications and create new notifications.
	Review and configure HR SLAs.

#	Configure
	Set up the <i>HR knowledge bases</i> . This is completed by the HR knowledge base administrator, who owns the content and its creation. The knowledge base administrator also defines and monitors the review, publication, and retirement processes.

## Roles

Roles used with the HR Service Management application

Role title [name]	Description	Contains Roles
HR specialist hr_specialist	Can create and update HR cases.	<ul style="list-style-type: none"> <li>hr_case_writer</li> </ul>
HR generalist hr_generalist	Can create and update HR cases.	<ul style="list-style-type: none"> <li>hr_case_writer</li> </ul>
HR recruiter hr_recruiting	Can create and update HR cases.	<ul style="list-style-type: none"> <li>hr_specialist</li> </ul>
HR payroll specialist hr_payroll	Can create and update HR cases.	<ul style="list-style-type: none"> <li>hr_specialist</li> </ul>
HR manager hr_manager	Full control over all HR functions.	<ul style="list-style-type: none"> <li>hr_profile_writer</li> <li>hr_case_writer</li> <li>hr_task_writer</li> <li>survey_admin</li> <li>hr_position_writer</li> <li>hr_profile_reader</li> <li>hr_case_reader</li> <li>catalog_admin</li> <li>hr_kb_writer</li> <li>skill_admin</li> <li>hr_task_reader</li> <li>hr_agent</li> <li>hr_dispatcher</li> </ul>
Director of HR hr_director	Full control over all HR functions.	<ul style="list-style-type: none"> <li>hr_manager</li> </ul>
Assignment rule reviewer hr_assignment_reader	Can read HR assignment rules.	<ul style="list-style-type: none"> <li>None</li> </ul>
Assignment rule updater hr_assignment_writer	Can update HR assignment rules.	<ul style="list-style-type: none"> <li>hr_assignment_reader</li> </ul>

Role title [name]	Description	Contains Roles
HR information systems administrator. hris_admin	Can configure HR assignment rules.	<ul style="list-style-type: none"> <li>hr_admin</li> <li>hr_assignment_reader</li> <li>hr_assignment_writer</li> </ul>
HR system administrator hr_admin	Full control over all human resources data and can administer territories and skills.	<ul style="list-style-type: none"> <li>all HR roles</li> <li>territory_admin</li> <li>skill_model_admin</li> <li>survey_admin</li> <li>catalog_admin</li> <li>template_admin</li> <li>skill_admin</li> <li>knowledge_manager</li> <li>assignment_rule_admin</li> <li>model_manager</li> </ul>
HR agent hr_basic	Can create, update, and delete HR cases and follow up on those they created.	<ul style="list-style-type: none"> <li>document_management_user</li> <li>inventory_user</li> <li>hr_case_writer</li> <li>hr_kb_writer</li> <li>skill_user</li> <li>hr_profile_writer</li> <li>survey_reader</li> <li>territory_user</li> <li>hr_task_writer</li> </ul>
HR agent hr_agent	Can accept or reject a task and work on an HR case.	<ul style="list-style-type: none"> <li>hr_basic</li> </ul>
HR case reviewer hr_case_reader	Can read HR cases and HR profiles.	<ul style="list-style-type: none"> <li>hr_read</li> <li>hr_profile_reader</li> </ul>
HR agent hr_read	Can read and create HR cases and follow up on those they created	<ul style="list-style-type: none"> <li>hr_profile_reader</li> </ul>
HR case worker hr_case_writer	Can create and update HR cases.	<ul style="list-style-type: none"> <li>hr_case_reader</li> </ul>
HR approver hr_approver_user	Can approve HR cases.	<ul style="list-style-type: none"> <li>approver_user</li> </ul>
HR task reviewer hr_task_reader	Can read HR tasks.	<ul style="list-style-type: none"> <li>None</li> </ul>
HR task worker hr_task_writer	Can create and update HR tasks.	<ul style="list-style-type: none"> <li>hr_task_reader</li> </ul>

Role title [name]	Description	Contains Roles
HR profile reviewer hr_profile_reader	Can read HR profiles.	<ul style="list-style-type: none"> <li>None</li> </ul>
HR dispatcher hr_dispatcher	Can schedule and assign tasks to agents.	<ul style="list-style-type: none"> <li>inventory_user</li> <li>hr_basic</li> <li>skill_model_user</li> <li>territory_user</li> </ul>
Basic HR staff member hr_initiator	Can create, update, and delete HR cases and follow up on those they created. Is used also to grant UI access.	<ul style="list-style-type: none"> <li>hr_basic</li> </ul>
HR profile specialist hr_profile_writer	Can create and update HR profiles.	<ul style="list-style-type: none"> <li>hr_profile_reader</li> </ul>
HR position specialist hr_position_writer	Can create, update, and delete HR position records.	<ul style="list-style-type: none"> <li>None</li> </ul>
HR knowledge article writer hr_kb_writer	Can create and update HR knowledge articles.	<ul style="list-style-type: none"> <li>None</li> </ul>
Content formatter [content_block_open_header_user]	Can edit the HR Portal header.	<ul style="list-style-type: none"> <li>None</li> </ul>

## Activate HR Service Management

The Human Resources Application: Core plugin is available as a separate subscription. If you are using the Connect Support feature and want to set up the HR chat queue, activate the Human Resources Application: HR Connect plugin.

Role required: admin

To purchase a subscription, contact your ServiceNow account manager. After purchasing the subscription, activate the plugin within the production instance.

You can evaluate the feature on a sub-production instance without charge by requesting it from the HI Customer Service System.

1. Navigate to **System Definition > Plugins**.
2. Right-click the plugin name on the list and select **Activate/Upgrade**.

If the plugin depends on other plugins, these plugins are listed along with their activation status.

3. Optional: If available, select the **Load demo data** check box.

Some plugins include demo data—sample records that are designed to illustrate plugin features for common use cases. Loading demo data is a good policy when you first activate the plugin on a development or test instance. You can load demo data after the plugin is activated by repeating this process and selecting the check box.

4. Click **Activate**.

## Installed with HR Service Management

Several types of components are installed with HR Service Management.

The components installed with Human Resources are:

- Tables
- Roles
- User groups
- Script includes
- Client scripts
- Business rules
- Email notifications
- Events
- HR skills
- HR catalog items

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**Note:** Demo data is available with this plugin.

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## Tables installed with HR Service Management

Human Resources Application: Core plugin adds the following tables.

Table	Description
CMDB HR Case Product Model [cmdb_hr_case_product_model]	The product models used for HR case record producers.
CMDB HR Task Product Model [cmdb_hr_task_product_model]	The product models used for HR task record producers.
Content Block Open Header [content_block_open_header]	The HR Portal content header definition.
HR Assignment Data Lookup [dl_hr_assignment]	The details of who HR cases can be assigned to.
HR Case [hr_case]	The details of a submitted HR case.
HR Category [hr_category]	The categories that can be assigned to HR cases, used for assignment and reporting.
HR Emergency Contact [hr_emergency_contact]	The details of emergency contacts, displayed in the hr_profile record for a sys_user. Contains a reference to Profile [hr_profile].
HR Employment History [hr_employment_history]	The details of employment history, displayed in the hr_profile record for a sys_user. Contains a reference to Profile [hr_profile].

Table	Description
HR Position [hr_position]	The job positions and a reference to the departments the positions are part of.
HR Profile [hr_profile]	The details of a profile for an employee that contains sensitive information.
HR Task [hr_task]	The details of a task associated with a particular HR case.
HR Case Flow [sf_hr_case]	The details of HR case state flows.
HR Task Flow [sf_hr_task]	The details of HR task state flows.

Table 4: Tables for PDF generator

Table	Description
General Element [general_elements]	The formats used by the PDF generator that can be used to customize the template for the PDF document.
General List [general_list]	A list of the properties and query used to generate the PDF document, for example, the employment verification letter.

## Roles installed with HR Service Management

Human Resources Application: Core plugin adds the following roles.

Role title [name]	Description	Contains Roles
HR specialist hr_specialist	Can create and update HR cases.	<ul style="list-style-type: none"> <li>hr_case_writer</li> </ul>
HR generalist hr_generalist	Can create and update HR cases.	<ul style="list-style-type: none"> <li>hr_case_writer</li> </ul>
HR recruiter hr_recruiting	Can create and update HR cases.	<ul style="list-style-type: none"> <li>hr_specialist</li> </ul>
HR payroll specialist hr_payroll	Can create and update HR cases.	<ul style="list-style-type: none"> <li>hr_specialist</li> </ul>

Role title [name]	Description	Contains Roles
HR manager hr_manager	Full control over all HR functions.	<ul style="list-style-type: none"> <li>• hr_profile_writer</li> <li>• hr_case_writer</li> <li>• hr_task_writer</li> <li>• survey_admin</li> <li>• hr_position_writer</li> <li>• hr_profile_reader</li> <li>• hr_case_reader</li> <li>• catalog_admin</li> <li>• hr_kb_writer</li> <li>• skill_admin</li> <li>• hr_task_reader</li> <li>• hr_agent</li> <li>• hr_dispatcher</li> </ul>
Director of HR hr_director	Full control over all HR functions.	<ul style="list-style-type: none"> <li>• hr_manager</li> </ul>
Assignment rule reviewer hr_assignment_reader	Can read HR assignment rules.	<ul style="list-style-type: none"> <li>• None</li> </ul>
Assignment rule updater hr_assignment_writer	Can update HR assignment rules.	<ul style="list-style-type: none"> <li>• hr_assignment_reader</li> </ul>
HR information systems administrator. hris_admin	Can configure HR assignment rules.	<ul style="list-style-type: none"> <li>• hr_admin</li> <li>• hr_assignment_reader</li> <li>• hr_assignment_writer</li> </ul>
HR system administrator hr_admin	Full control over all human resources data and can administer territories and skills.	<ul style="list-style-type: none"> <li>• all HR roles</li> <li>• territory_admin</li> <li>• skill_model_admin</li> <li>• survey_admin</li> <li>• catalog_admin</li> <li>• template_admin</li> <li>• skill_admin</li> <li>• knowledge_manager</li> <li>• assignment_rule_admin</li> <li>• model_manager</li> </ul>

Role title [name]	Description	Contains Roles
HR agent hr_basic	Can create, update, and delete HR cases and follow up on those they created.	<ul style="list-style-type: none"> <li>document_management_user</li> <li>inventory_user</li> <li>hr_case_writer</li> <li>hr_kb_writer</li> <li>skill_user</li> <li>hr_profile_writer</li> <li>survey_reader</li> <li>territory_user</li> <li>hr_task_writer</li> </ul>
HR agent hr_agent	Can accept or reject a task and work on an HR case.	<ul style="list-style-type: none"> <li>hr_basic</li> </ul>
HR case reviewer hr_case_reader	Can read HR cases and HR profiles.	<ul style="list-style-type: none"> <li>hr_read</li> <li>hr_profile_reader</li> </ul>
HR agent hr_read	Can read and create HR cases and follow up on those they created	<ul style="list-style-type: none"> <li>hr_profile_reader</li> </ul>
HR case worker hr_case_writer	Can create and update HR cases.	<ul style="list-style-type: none"> <li>hr_case_reader</li> </ul>
HR approver hr_approver_user	Can approve HR cases.	<ul style="list-style-type: none"> <li>approver_user</li> </ul>
HR task reviewer hr_task_reader	Can read HR tasks.	<ul style="list-style-type: none"> <li>None</li> </ul>
HR task worker hr_task_writer	Can create and update HR tasks.	<ul style="list-style-type: none"> <li>hr_task_reader</li> </ul>
HR profile reviewer hr_profile_reader	Can read HR profiles.	<ul style="list-style-type: none"> <li>None</li> </ul>
HR dispatcher hr_dispatcher	Can schedule and assign tasks to agents.	<ul style="list-style-type: none"> <li>inventory_user</li> <li>hr_basic</li> <li>skill_model_user</li> <li>territory_user</li> </ul>
Basic HR staff member hr_initiator	Can create, update, and delete HR cases and follow up on those they created. Is used also to grant UI access.	<ul style="list-style-type: none"> <li>hr_basic</li> </ul>
HR profile specialist hr_profile_writer	Can create and update HR profiles.	<ul style="list-style-type: none"> <li>hr_profile_reader</li> </ul>



Role title [name]	Description	Contains Roles
HR position specialist hr_position_writer	Can create, update, and delete HR position records.	<ul style="list-style-type: none"> <li>None</li> </ul>
HR knowledge article writer hr_kb_writer	Can create and update HR knowledge articles.	<ul style="list-style-type: none"> <li>None</li> </ul>
Content formatter [content_block_open_header_user]	Can edit the HR Portal header.	<ul style="list-style-type: none"> <li>None</li> </ul>

## User groups installed with HR Service Management

Human Resources Application: Core plugin adds the following user groups.

User group	Description
HR	Parent to other HR roles. It grants the HR manager role, and its child groups inherit the HR manager role.
HR Benefits	Group members administer HR benefits. Inherits the HR manager role.
HR Investigations	Group members investigate HR cases. Inherits the HR manager role.
HR Leadership	Group members manage HR teams. Inherits the HR manager role.
HR Payroll	Group members administer HR payroll. Inherits the HR manager role.
HR VIP Watchlist	Members of this group are added to the watchlist of HR cases for VIP users. No roles are granted.
Human Resources Vendors	HR may employ consultants to teach courses or provide other employee relations services. Consultants placed in this group can work on HR cases assigned to them to track their service. Grants the HR agent role.

## Data policies installed with HR Service Management

Human Resources Application: Core adds the following data policy.

Data policy	Table	Description
Data policy for Human Resources knowledge base	Knowledge kb_knowledge]	Identifies the HR knowledge base by sys_id.

## Script includes installed with HR Service Management

Human Resources Application: Core adds the following script includes.

Script include	Description
hr_AbstractWrapper	Abstract wrapper used to wrap GlideRecord objects related to the HR application.
hr_BaseFactory	Base class providing wrappers for HR objects.
GeneralHRForm	Implementation script for the HR employment verification letter.
hr	Container for commonly used values.
SmartHierarchyProcessor	Displays hierarchical data based on a parent child relationship.
OrgChartProcessor	Draws an organization chart based on department records.
hr_Factory	Customizable class providing the correct HR wrapper type.
hr_Case	Wrapper class for HR Case records.
hr_CaseAjax	Wrapper class for HR Case Ajax requests.
hr_Task	Wrapper class for HR Task.
hr_Profile	Wrapper class for HR Profile records.
hr_SysUser	Wrapper class for HR functionality on sys_user records.
hr_Utils	Generic functionality for the HR application.
hr_Position	Wrapper class for HR Position records.

## Client scripts installed with HR Service Management

Human Resources Application: Core adds the following client scripts.

Client script	Table	Description
Adjust priority when requestor changes	HR Case [hr_case]	Adjusts HR case priority based on whether or not the user is a VIP.
Auto populate fields	HR Case [hr_case]	Automatically sets location and department fields in HR cases, based on details from the user associated with that record.
Autopopulate HR profile onLoad	HR Case [hr_case]	Populates the HR profile fields in an HR case if the opened for user has an HR profile.

Client script	Table	Description
Custom Knowledge Search	HR Case [hr_case]	Custom knowledge search in the HR case form view.
End date must be after start date	HR Employment History [hr_employment_history]	Validates that the employment end date is not before the employment start date.
Enforce unique user	HR Profile [hr_profile]	Prevents creating a new profile when the selected user already has an HR profile.
Hide Record Producer variables	HR Case [hr_case]	Hides record producer variables which would otherwise be displayed in the HR case form view.
Highlight VIP employee	HR Case [hr_case]	Formats an HR case for a VIP user in the HR case list.
Populate Category using template	HR Case [hr_case]	Populates the category based on the selected HR template.
Populate fields using sys_user	HR Profile [hr_profile]	Updates fields in a new HR profile record when an existing user is selected.
Populate HR profile onChange	HR Case [hr_case]	Updates the HR profile fields in an HR case automatically when the opened for user is changed.
Populate Opened for field onChange	HR Case [hr_case]	Updates the <b>Opened for</b> field when a profile is added to an HR case.
Populate template using category	HR Case [hr_case]	Populates the template on an HR case when a category is changed.
Start date must be before end date	HR Employment History [hr_employment_history]	Validates that the employment start date is not after the employment end date.

## Business rules installed with HR Service Management

Human Resources Application: Core adds the following business rules.

Business rule	Table	Description
Assigned Ready for work (approval off) Ready for approval Ready for work (approval on) Start work Cancellation	HR Case [hr_case]	Invokes the state flow process for HR cases.
Accept Assigned Cancel cleanup Ready for work Reassign Resume HR case Start work	HR Task [hr_task]	Invokes the state flow process for HR tasks.
Add categories to scratchpad	HR Case [hr_case]	Loads the HR case types and associated categories and maps the template to the case type.
Add HR Supervisor to watch list	HR Case [hr_case]	Adds members of the HR VIP Watchlist group to an HR case when the user is a VIP.
Add User Acceptance State	HR Case [hr_case]	Places an HR case into <b>Waiting for user acceptance</b> state.
Auto-assessment business rule	HR Case [hr_case]	Triggers an HR survey when the case is closed or cancelled.
Clear durations	HR Case [hr_case]	Clears the Duration value on hr_case records if the case is reactivated (when Active changes to true on a record inserted or updated).
Close HR task	HR task [hr_task]	Closes the HR task that was created to request documentation from an employee when the employee replies to the email and attaches the file.
Enforce unique user	HR Profile [hr_profile]	Ensures that a duplicate HR profile is not entered for a user.
Exit survey trigger	HR Task [hr_task]	Sends a link to the exit survey when the exit survey task state changes to <b>Work in Progress</b> .

Business rule	Table	Description
Remove HR Supervisor from watch list	HR Case [hr_case]	Removes HR VIP Watchlist group members from an HR case when the user is no longer a VIP.
Restrict query	HR Case [hr_case]	Amends the query used to get HR case records to display in list view.
Restrict query	HR Task [hr_task]	Amends the query used to get HR task records to display in list view.
Restrict query	Emergency Contact [hr_emergency_contact]	Amends the query used to get records to display in list view.
Restrict query	Employment History [hr_employment_history]	Amends the query used to get records to display in list view.
Send hr_case events	HR Case [hr_case]	Adds events to the event queue when records are inserted or updated.
Set HR mailto	System properties [sys_properties]	Sets the email address specified in the Configuration module when the user selects <b>Email HR</b> on the HR Portal.
Set user fields	HR Case [hr_case]	Sets the Opened for value on an hr_case record when the record is inserted or updated.
Start HR User Acceptance timer	HR Case [hr_case]	Starts the timer when an HR case is resolved. The user is notified to accept the resolution and close the case. With no user response, the case is automatically closed when the time ends.
Synchronize fields to hr_profile	User [sys_user]	Synchronizes fields between associated hr_profile and sys_user records on update of the sys_user record.
Synchronize fields to sys_user	HR Profile [hr_profile]	Synchronizes fields between associated sys_user and hr_profile records on update of the hr_profile record.
Update durations	HR Case [hr_case]	Sets the Duration value on hr_case records if the case becomes inactive (when Active changes to false on record inserted or updated).

Business rule	Table	Description
Update HR Case percent complete	Task [task]	Updates the task percent complete for an HR case based on the state of associated HR tasks.
Update hr_case when hr_task changes	HR Task [hr_task]	Updates <b>Additional comments</b> and <b>Work notes</b> fields on the associated hr_case record when an hr_task record is created or updated.
Update name field	HR Profile [hr_profile]	Updates the Name value on an hr_profile record if the First name or Last name value changes when a record is inserted or updated.
Validate end date is after start date	HR Profile [hr_profile]	Validates that Employment end date is after Employment start date if any of the two values changes when an hr_profile record is inserted or updated.
Validate opened_for against hr_profile	HR Case [hr_case]	Updates the <b>Opened for</b> value on hr_case records when <b>State</b> is not <b>Requested</b> and the record is updated.
ValidateChanges	HR Task [hr_task]	Ensures that changes are valid.
Verify Work Notes	HR Case [hr_case]	Requires that work notes are entered when the HR case state changes.
Verify Work Notes	HR Task [hr_task]	Requires that work notes are entered when the HR task state changes.

## Email notifications installed with HR Service Management

Human Resources Application: Core uses the following email notifications. All are based on the HR Case [hr\_case] table.

Script action	Description
HR Case opened	Sends an email to the caller and the user who enters the case when <b>Active</b> is true on record inserted.
HR Case created from email	Sends an email to the sender when an HR case is created from an inbound email action.
HR Case assigned to me	Sends an email to the assigned user when Active is true AND Assigned to is not empty AND Assigned to change AND On record inserted or updated.

Script action	Description
HR Case assigned to my group	Sends an email to the assignment group members when Active is true AND Assigned to is empty AND Assignment group changes AND Assignment group is not empty AND On record inserted or updated.
HR Case commented	Sends an email to the creator, the caller, the assigned user, and members of the watchlist when Active is true AND Additional Comments changes AND On record updated.
HR Case resumed	Sends an email to the assigned user when an HR task is closed complete and the HR case is automatically resumed.
HR Case changed	Sends an email to the sender and the assigned user or group when the state, assignee, assignment group, or work notes are changed in an HR case.
HR Case worknoted	Sends an email to the assigned user when Active is true AND Assigned to is not empty AND Work notes changes AND On record updated.
HR Case closed	Sends an email to the creator, the caller, the assigned user, and members of the watchlist when Active is false AND On record updated.
HR Company welcome email	Sends an email to the HR profile manager on an event fired by the Employee Onboarding HR Workflow.
HR Task assigned to me	Sends an email to the assigned user when Active is true AND Assigned to is not empty AND Assigned to change AND On record inserted or updated.
HR Task assigned to my group	Sends an email to the assignment group members when Active is true AND Assigned to is empty AND Assignment group changes AND Assignment group is not empty AND On record inserted or updated.
HR Task commented	Sends an email to the assigned user, and members of the watchlist when Active is true AND Additional Comments changes AND On record updated.
HR Task closed	Sends an email to the user assigned to the HR case when Active is false AND On record updated.
HR Task changed	Sends an email to the event creator and the users defined in event parms 1 and 2 when the hr.task.changed event is fired.
HR Employment Verification	Sends an email to the third party who requested the employment verification letter.

## Events installed with HR Service Management

Human Resources Application: Core registers the following events.

Event	Description
hrc.case.resume	Triggers when an HR task is closed and the HR case is resumed.
hrc.request.changed	Triggers when the state, assignee, assignment group and work notes are changed.
hrc.request.email.creation	Triggers when a request is inserted from an email.
hrc.task.changed	Triggers when the state, assignee, assignment group and work notes are changed.
hrc.task.closed	Triggers when a task is closed complete, but the parent case is not resumed and one or more tasks are still pending.
hr_case.approved	Triggers on approval of an HR case.
hr_case.assignment_group.changed	Triggers when the assignment group is changed.
hr_case.commented	Triggers when a comment is added to an HR case.
hr_case.emp_verification	Triggers from a UI action for employment verification to send the employment verification email to the requestor.
hr_case.inserted	Triggers on insertion of an HR case.
hr_case.inserted.assigned	Triggers on insertion and auto-assignment of an HR case.
hr_case.inserted.unassigned	Triggers on insertion of an HR case that is not auto-assigned.
hr_case.updated	Triggers when an HR case is updated.
hr_case.welcome_email	Triggers on insertion of an onboarding case to send the welcome email for a new employee.

## HR skills installed with HR Service Management

Human Resources Application: Core adds the following HR skills.

HR skill	Description
Employee Career	Provides guidance about an employee's career path
Employee Offboarding	Manages offboarding cases to ensure all tasks are completed
Employee Onboarding	Manages onboarding cases to ensure all tasks are completed



HR skill	Description
Employee Relations	Assists employees with employee relations cases
Employee Transfer	Manages process for transferring employees to ensure all tasks are completed
Exit Interviews	Interviews offboarding employees to ensure compliance and collect feedback
Hiring	Manages processes, such as personnel requisitions, for the hiring of new employees
HR	Is contained within all HR skills.
HR Benefits	Assists employees with benefits cases
HR Policy	Assists employees with questions about company policies
HR Systems	Manages HR systems, such as payroll, learning management system, and employee database
Leave of Absence	Assists employees to schedule leaves of absence, such as maternity leave
Payroll	Assists employees with payroll questions and issues
Spanish Language	Speaks Spanish, and can act as a translator if needed
Time Tracking	Assists employees with timecard questions
Vacation/Leave	Assists employees with vacation or leave questions

## HR Catalog items installed with HR Service Management

Human Resources Application: Core adds the following HR catalog items.

HR catalog item	Description
401(k) benefits	Submit a question about 401(k) benefits. For example: How much can I contribute? or When will withdrawals start?
Career guidance	Submit a question about your career at the organization. For example: What is required to be considered for a promotion?
Employee information changes	Enter and submit changes to your HR profile information, such as a new personal email address. Some fields update automatically, and others are updated by an HR agent.
Employee offboarding	Submit an offboarding request for an employee who is leaving the company. Variables include the employee who is leaving, the offboard type, and the employment end date.

HR catalog item	Description
Employee onboarding	Submit an onboarding request for a new hire that is due to start in the future. Variables include HR profile information, employment information, and personal information.
Employee relations questions	Submit a question about employee relations. For example: My office mate talks too loudly on the phone all day long.
Employment verification	Submit a request to have an employment verification letter generated and sent to a third-party contact, such as a bank loan officer. Variables include the name of the institution, contact name and info, and email address.
General	Submit a question about benefits that are not covered by the other catalog items. For example: Does the company have a discount program?
Grievance	Submit a case describing an occurrence or situation that needs to be addressed. For example: Someone is smoking cigarettes every afternoon in the 2nd floor bathroom.
Leave of absence	Submit a request for a leave of absence. Variables include the type of leave and when it starts and ends.
Life events	Submit a question about life events such as marriage or domestic partnership.
Medical/dental/vision	Submit a question about your health coverages, such as what you need to do to cover your domestic partner.
Payroll	Submit a question about payroll. For example: How do I change my W2 deductions?
Retirement	Submit a question about retirement benefits and options, such as how many years must you have with the company to qualify for retirement.
Tuition	Submit a request for tuition reimbursement following your company guidelines. Variables include the educational institution, class taken, completion date, and the tuition amount.
Vacation	Submit a question about vacation policies, such as when you get an additional week per year.

## Activate Human Resources Connect

Activating the Human Resources Application: HR Connect plugin enables the HR chat queue and puts a link to it on the HR Portal. If your organization uses the Connect feature, activate this plugin after you finish activating the Human Resources Application: Core plugin.

Role required: admin

1. Navigate to **System Definition > Plugins**.
2. Right-click the plugin name on the list and select **Activate/Upgrade**.

If the plugin depends on other plugins, these plugins are listed along with their activation status.

3. Optional: If available, select the **Load demo data** check box.

Some plugins include demo data—sample records that are designed to illustrate plugin features for common use cases. Loading demo data is a good policy when you first activate the plugin on a development or test instance. You can load demo data after the plugin is activated by repeating this process and selecting the check box.

4. Click **Activate**.

## Activate HR Performance Analytics

The Human Resources Performance Analytics plugin can be activated after you purchase subscriptions to Human Resources and Performance Analytics Premium.

Role required: admin

To purchase a subscription, contact your ServiceNow account manager. After purchasing the subscription, activate the plugin within the production instance.

You can evaluate the feature on a sub-production instance without charge by requesting it from the HI Customer Service System.

1. Navigate to **System Definition > Plugins**.
2. Right-click the plugin name on the list and select **Activate/Upgrade**.

If the plugin depends on other plugins, these plugins are listed along with their activation status.

3. Optional: If available, select the **Load demo data** check box.

Some plugins include demo data—sample records that are designed to illustrate plugin features for common use cases. Loading demo data is a good policy when you first activate the plugin on a development or test instance. You can load demo data after the plugin is activated by repeating this process and selecting the check box.

4. Click **Activate**.

## Installed with HR Performance Analytics

Several types of components are installed with Human Resources Performance Analytics.

Demo data is available.

## Tables modified with HR Performance Analytics

Human Resources Application: Performance Analytics modifies the following tables.

Table	Description
Breakdown [pa_breakdown]	Breakdown definitions.

Table	Description
Bucket [pa_bucket]	Definition of buckets belonging to bucket group
Bucket group [pa_bucket_groups]	Bucket group definition.
Indicator Source [pa_cubes]	Configuration of source (table) and conditions (filter) for the indicator.
Breakdown Source [pa_dimensions]	Configuration of source (table) and conditions (filter) for the breakdown.
Indicator [pa_indicators]	List of indicators configured.
Indicator Breakdown [pa_indicator breakdowns]	List of breakdowns that are configured for an indicator.
Job Indicator [pa_job indicators]	Indicators belonging to a data collection job.
Breakdown Widget Indicator [pa_m2m_widget_indicators]	List of breakdown widget indicators.
Script [pa_scripts]	Scripts used in data collection.
Unit [pa_units]	List of units that can be used for an indicator definition.
Widget Configuration [pa_widgets]	List of widgets for dashboard tabs.
Widget Indicator [pa_widget_indicators]	List of indicators belonging to a widget.

## Configure HR Service Management

You can set the configuration of HR Service Management to determine how to handle day-to-day operations.

Role required: admin or hr\_admin

You must be in the global domain to set HR configuration options. Administrators in domains lower than the global domain can view the Configurations page, but cannot modify the settings.

1. Navigate to **Human Resources > Administration > Configuration**.

The options on the configuration screen are arranged in a multiple-tabbed layout:

- The **Business Process** tab contains options for setting up the request lifecycle, creating catalogs and requests, and configuring notifications.
- The **Assignment** tab contains options for setting up manual and auto-assignment.
- The **Add-ons** tab contains options for enabling the knowledge base, managed documents, and task activities.
- The **Human Resources** tab contains specific options for the HR application.

A configuration option is enabled when the switch appears green and is toggled to the right. All configuration options listed in the **Dependency** column must be enabled for the option to be displayed.

2. Select configurations on the **Business Process** tab.

**Table 5: Business process tab options**

Field	Description	Dependency
<b>Lifecycle</b>		
Assignment method for requests	Select the method for assigning requests. <ul style="list-style-type: none"> <li>• <b>using auto-assignment:</b> Requests are automatically assigned.</li> <li>• <b>using a workflow:</b> You are prompted to select the workflow to use for assignment.</li> <li>• <b>manually:</b> you must manually assign requests.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Automate state flows</b> on the Human Resources tab is enabled.</li> </ul>
Use this workflow to assign requests	Select the workflow for assigning requests.	<ul style="list-style-type: none"> <li>• <b>Automate state flows</b> on the Human Resources tab is enabled.</li> </ul>
Assignment method for tasks	Select the method for assigning tasks: <ul style="list-style-type: none"> <li>• <b>using auto-assignment:</b> Tasks are automatically assigned.</li> <li>• <b>using a workflow:</b> You will be prompted to select the workflow you want to use for assignment.</li> <li>• <b>manually:</b> you must manually assign tasks.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Automate state flows</b> on the Human Resources tab is enabled.</li> </ul>
Use this workflow to assign tasks	Select the workflow for assigning tasks.	<ul style="list-style-type: none"> <li>• <b>Automate state flows</b> on the Human Resources tab is enabled.</li> </ul>

Field	Description	Dependency
<b>Lifecycle</b>		
Copy task work notes to request	Enable this option to synchronize task work notes with the work notes on the order or request. When work notes are added in the task, the same work notes appear in the order or request.	<ul style="list-style-type: none"> <li>• <b>Automate state flows</b> on the Human Resources tab is enabled.</li> </ul>
<b>Catalog and Request Creation</b>		
Create or update requests by inbound email.	Enable this option to allow inbound email messages to create or update requests.	
Templates create a dedicated catalog item	Enable this option to activate automatic publishing of catalog items for the application.	
<b>Notification</b>		
Table Field Recipients	<p>Set up notifications for changes to HR cases or tasks.</p> <ul style="list-style-type: none"> <li>• <b>Table:</b> Select whether this notification is sent for a change to the Request or the Task table.</li> <li>• <b>Field:</b> Select the field that must change for the notification to be triggered.</li> <li>• <b>Recipients:</b> Select the recipients of the notification. If you select <b>a specific user</b> or <b>a specific group</b>, you are prompted to select a user or group.</li> </ul> <p>Enter as many notifications as you need. To remove a notification, click the delete (-) icon on the right.</p>	

3. Click the **Assignment** tab and select configurations.

Table 6: Assignment tab options

Field	Description	Dependency
<b>Manual Assignment</b>		
Assign requests or tasks based on assignment group coverage areas	Enable this option to limit the selection of groups from the <b>Dispatch group</b> and <b>Assignment group</b> fields to groups that cover the location of the task.	
Auto-Assignment / Scheduling		
Auto-selection of agents will consider time zone for tasks	Enable this option to consider the time zone of the agent when assigning a task	<ul style="list-style-type: none"> <li>• <b>Automate state flows</b> on the Human Resources tab is enabled.</li> </ul>
Additional Factors		
Auto-selection of agents will consider location of agents	Enable this option to use the agent and location when determining who to assign the task to. Agents closer to the task location get preference.	<ul style="list-style-type: none"> <li>• <b>Automate state flows</b> on the Human Resources tab is enabled.</li> <li>• <b>Assignment method for requests: using auto-assignment</b></li> <li>• <b>Assignment method for tasks: using auto-assignment</b></li> </ul>
Auto-selection of agents for tasks requires them to have skills	<p>This option determines the degree to which skills must be matched to a task when determining auto-assignment.</p> <ul style="list-style-type: none"> <li>• Select <b>all</b> to require that an assigned agent have all of the skills to perform the task. An agent who lacks one skill is eliminated.</li> <li>• Select <b>some</b> if you want agents who have most of the skills needed to perform the task.</li> <li>• Select <b>none</b> if you want to auto-assign agents without taking skills into account.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Automate state flows</b> on the Human Resources tab is enabled.</li> <li>• <b>Assignment method for requests: using auto-assignment</b></li> <li>• <b>Assignment method for tasks: using auto-assignment</b></li> </ul>

Field	Description	Dependency
<b>Manual Assignment</b>		
Auto-selection will attempt to assign the same agent to all tasks in a request	Enable this option to auto-assign all tasks for a request to the same agent.	<ul style="list-style-type: none"> <li>• <b>Automate state flows</b> on the Human Resources tab is enabled.</li> <li>• <b>Assignment method for requests: using auto-assignment</b></li> <li>• <b>Assignment method for tasks: using auto-assignment</b></li> </ul>

4. Click the **Add-ons** tab and select configurations.

**Table 7: Add-ons tab options**

Field	Description	Dependency
<b>Documentation</b>		
Enable a dedicated knowledge base	Enable this option to activate the knowledge base for the application.	
Enable managed documents	Enable this option to add a related list to managed documents.	
Enable task activities	Enable this option to log the task interactions and communications, such as phone calls and email messages.	
<b>Associated Task Tables</b>		
Select associated tables	Click <b>Add</b> to select additional tables.	

5. Click the **Human Resources** tab and select configurations.

---

**Note:** If you are using Microsoft Internet Explorer 8 or 9, the **Human Resources** tab does not appear. You can set these properties in the System Properties [sys\_properties] table.

---



Table 8: Human Resources tab options

Configuration setting	Description
HR profile fields that users or managers can edit without HR approval include <number of fields>	<p>Select the HR profile fields that are editable. Click <b>Save</b> to exit the selection dialog and save your changes.</p> <p>The personal information fields that you enable, such as name, address, and personal contact information, are editable by employees directly in their HR profile. For example, you may allow employees to edit their home address and personal email address, but not their name or marital status.</p> <p>The more sensitive and the employment information fields that you mark as editable can be changed by the employee's manager or an HR agent by submitting an employee change request. If only editable information is changed, the HR profile is updated and the HR case that is created when the request is submitted is closed.</p>
Human Resources group email	Enter your organization's email address for the HR team. This is the email address for the <b>Contact HR</b> link on the HR Portal. When it is used, an HR case is created using an inbound email action.
Automate state flows	<p>Enable this option to use state flows for HR cases and tasks. Disable it to use only workflows to automate the status of HR cases and tasks.</p> <p>If state flows are automated, HR agents are not able to manually change the state of HR cases and tasks.</p> <p>If state flows are not automated, the state of HR cases and tasks can be changed manually. Additionally, the HR business rules that invoke the state flow process are inactive.</p>
Default HR case priority for VIP user is <b>2-High</b>	Select the default priority to assign to an HR case that is entered for a VIP user.

6. Click **Save**.  
Clicking **Save** on any tab saves all configuration settings.

## HR profile editable field configuration

An option in Human Resources Configuration provides a list of HR profile fields that can be enabled for edit. Understand the difference between how the personal and the employment information fields are updated in the HR profile based on this configuration.

Typically, organizations allow employees to update certain personal information, but not sensitive and employment information, which is changed by an HR agent or the employee's manager. For example, employees can change their home address and personal email address, but the manager must update the employee's position when the employee is promoted.

The **HR profile fields that users or managers can edit without HR approval include <number of fields>** option in Human Resources Configuration provides the list of editable HR profile fields. The following list of fields indicates which of the configurable fields contain personal and which contain sensitive and employment information.

Personal information fields	Sensitive and employment information fields
<ul style="list-style-type: none"> <li>• Home address</li> <li>• Home city</li> <li>• Home country</li> <li>• Home phone</li> <li>• Home state/province</li> <li>• Home zip/postal</li> <li>• Middle name</li> <li>• Personal email</li> <li>• Personal mobile phone</li> <li>• Prefix</li> <li>• Work email</li> <li>• Work mobile</li> <li>• Work phone</li> </ul>	<ul style="list-style-type: none"> <li>• Date of birth</li> <li>• Department</li> <li>• Employee number</li> <li>• Employment end date</li> <li>• Employment start date</li> <li>• Employment status</li> <li>• Employment type</li> <li>• Ethnicity</li> <li>• First name</li> <li>• Gender</li> <li>• Last name</li> <li>• Location</li> <li>• Location type</li> <li>• Manager</li> <li>• Marital status</li> <li>• Nationality</li> <li>• Notice period</li> <li>• Place of birth</li> <li>• Position</li> <li>• Probation end date</li> <li>• Probation period</li> <li>• Time type</li> </ul>

In the configuration option field list, all of the personal information fields are enabled for edit by default. This means that all employees can open their HR profile from the HRSM Portal and update these fields. If you do not want to allow employees to update one or more of these fields, disable editing by clearing the check box in the configurable list. For example, you may not want employees updating their work email address or phone number.

The HR profile personal information fields are controlled also by ACLs, which can be modified if more controlled access is needed.

The employment information fields that you enable for edit allow an employee's manager to update the field. However, the manager cannot open the employee's HR profile. The manager must submit an employee information change request with the updated information. When the request to change the editable fields is submitted, the HR Employee Change Workflow takes the following actions.

- Opens an HR case.
- Updates the employee's HR profile.
- Closes the HR case.

To update any HR profile fields that are not editable, employees or their managers submit an employee information change request. An HR case is created and the HR Employee Change Workflow is started. The workflow requires that the change request is approved. When it is approved, the fields are updated and the HR case is closed.

## Automated HR processes

You can automate HR processes, such as onboarding a new employee. There are predefined processes that launch automated workflows. You can customize the predefined processes and create new ones.

Predefined processes are available to fulfill the following requests, or HR catalog items.

- **Employee onboarding:** HR managers can submit an HR onboarding request for a new employee.
- **Employee information change:** HR managers submit requests to update an employee's HR profile information, such as when their name, position, or location changes. Employees can submit requests to change some profile fields, such as home address or personal email. The HR profile fields are changed automatically when a request is submitted.
- **Employee offboarding:** HR managers can submit an HR offboarding request for an employee.

These HR catalog items can be customized for your organization and integrated with the wider organization, for example to engage the IT team to configure a laptop for a new employee. Standard sets of tasks for HR processes are defined, and the system can be configured to automatically create and assign these tasks at the appropriate time.

Employee information can be passed to other departments automatically to start their processes. The HR team does not need to be aware of the specifics of these other processes. Departments such as IT or facilities retain control over their processes and inform the HR department when they are completed.

Here is how the predefined onboarding process works for a new employee named Allen:

1. Allen's HR manager submits an **Employee onboarding** request from the HR catalog or HR portal. The following actions occur.
  - A new HR case is created with a category of **Onboarding**.
  - A new HR profile record is created to hold Allen's personal information from the onboarding form. The HR team can add information to Allen's HR profile to store and track all the data he provides.
2. An approval request is generated and assigned automatically to the user who can verify and approve the onboarding request.
3. After approval is obtained, Allen's user record is automatically created and linked to his HR profile. Standard HR tasks are automatically created for the HR team to fulfill, such as setting up payroll and benefits, and checking the candidate's background.
4. A workflow automatically generates requests to provide Allan with the correct IT hardware, software, and systems access based on his department, location, and position.
5. When all the tasks are complete, the HR department confirms that everything is ready for Allen's first day and closes the case record.

The HR team can track the progress of the entire onboarding process.

## Use events to launch HR processes

You can use events to launch workflow processes, typically when a new HR case is created. This process works as follows:

1. When an HR case is created or modified, an HR fulfillment event occurs. For example, the `hr_case.inserted` event occurs when a new HR case is created.
2. The event triggers script actions that execute scripts as required and launch workflows. For example, the `IT_employee_onboarding_action` script action launches the **Employee Onboarding IT Workflow**.

## Workflow-based HR process design

You can design a new workflow-based HR process if the predefined processes are not sufficient. You can create an entirely new workflow or use existing components in your HR process.

To design a new workflow or customize a predefined workflow, you typically work with someone in your organization who has experience with workflow design and customization.

The following components can be used or customized for HR processes.

- The predefined processes provided for onboarding, offboarding, and information change.
- The IT Employee Onboarding Action and IT Employee Offboarding Action script actions.
- Workflows that create HR and IT tasks.
- The order guide that creates catalog item requests.
- Record producers, known as catalog items, that launch HR automated processes.

The following items work by default with HR processes. You can modify them as needed. For example, you can extend the HR Profile table to capture additional information.

- HR Profile [`hr_profile`] table
- HR Case [`hr_case`] table
- Script includes

The following list outlines the tasks you perform to design a new automated HR process.

1. Design the process stages, outlining the process flow at a high level. An example is shown in the table below.
2. Create or customize a catalog item that will create the HR case.
3. Create the workflow to process the request, including any of the following relevant configurations.

### **Approval rules**

To review and approve or reject the request. For example, to approve a request for a leave of absence.

### **Assignment rules**

To assign the request to a specific individual or group. For example, to assign benefits change records to a specific benefits administrator. HR groups, skills, and locations can all be considered for auto-assignment.

### **Email notifications**

To alert an HR team member or group about the request. For example, to send a notification to the HR agent a case is assigned to.

**Fulfillment tasks**

To create HR tasks and requests for items that other departments fulfill. For example, an HR task to reactivate a user's email account when a leave of absence ends.

4. Customize profile information, if required by the new process. For example, you can extend the HR Profile table to create a Dependents table, which may be required for processing employee insurance claims.
5. Select an event to launch the workflow when the HR case is created.

**Table 9: Example of the typical stages for an onboarding process**

Stage	Description
Capture information	<ul style="list-style-type: none"> <li>• When an employment offer is accepted, capture basic information about the new employee.</li> <li>• Create an HR case and HR profile for the employee with the captured information.</li> <li>• Request approval for onboarding.</li> </ul>
Approval	<ul style="list-style-type: none"> <li>• Approve the onboarding request, then generate the tasks for this work, such as the following.               <ul style="list-style-type: none"> <li>• HR tasks, such as performing reference checks.</li> <li>• Non-HR requests, for example, relevant hardware and software that generate service catalog requested items. These requests are fulfilled by non-HR departments, such as IT.</li> </ul> </li> </ul>
Fulfillment	<ul style="list-style-type: none"> <li>• Fulfill the generated tasks required for onboarding.</li> </ul>
Start date	<ul style="list-style-type: none"> <li>• When the employee joins, perform actions such as the following.               <ul style="list-style-type: none"> <li>• Reset the employee's password or unlock the employee's Active Directory account.</li> <li>• Add roles to the employee.</li> <li>• Send a welcome email to the employee's team.</li> </ul> </li> </ul>

For more information, see [Email notifications](#).

## Employee Onboarding HR Workflow

Review detailed overview of the predefined HR automated process for employee onboarding to ensure it meets the needs of your organization. You may need to customize the onboarding workflow or design a new workflow.

To design a new workflow or customize a predefined workflow, you typically work with someone in your organization who has experience with workflow design and customization.

The onboarding process begins when an HR manager submits an onboarding request from the HR catalog or HR portal, which enters an HR case.

The system first checks for an existing HR profile based on the first name, last name, and personal email address of the person being onboarded. For example, an existing HR profile might exist if the person is a previous employee. If a matching HR profile is found, the system adds relevant information to the profile and updates the employment status. If an existing HR profile does not exist, then an HR profile record is created for the new employee. The record is populated with the personal information entered in the catalog form.

HR profiles are created before the approval flow is triggered, to enable the recording of confidential comments and work notes in the secure HR profile record. This allows sensitive information to be captured at an early stage.

---

**Note:** If the onboarding request is created from the Create New Case form, the user must begin by selecting the **Employee onboarding** template. The **Opened for** field is not required, and the user can click **Create Profile**, complete the information, and then submit the HR case.

---

After the request is submitted, the Employee Onboarding HR Workflow sends an email to approvers to request approval to onboard the new employee.

---

**Note:** Your instance must be configured to email approvers with a notification that an approval needs their attention.

---

When an onboarding request is approved, the following actions occur.

1. A new user record [sys\_user] is created for the employee and populated with the information entered in the HR profile.
2. The user record is linked to the HR case, and the user's name appears in the **Opened for** field in the HR case.
3. The state of the HR case is set to **Work in Progress**.
4. The hr\_case.approved fulfillment event occurs. This launches the following subflows and order guide.
  - An HR tasks workflow to generate tasks for the HR team to perform.
    - New employee payroll set up
    - New employee background checks
    - New employee anti-corruption policy acceptance
    - New employee benefits set up
    - New employee training requirements
  - An IT tasks workflow, triggered by the IT Employee Onboarding Action script action, runs an order guide using the **Scriptable Order Guide** activity to generate a service catalog request for requested items to be fulfilled by the IT team.
    - The order guide uses rules to specify which items are requested based on questions answered on the onboarding request. These answers populate variable values, and determine which requested items the order guide generates. For example, all employees receive an email account, but only some employees receive a laptop. The questions are **Employment type**,

**Department**, and **Location type**. For example, if the employee is a permanent employee, office-based, and working in development, the order guide generates the following requested items.

- Email account
  - Dreamweaver
  - Office desktop
  - BlackBerry Z10
- The **Requested for** field is set to the new employee.
  - An approval request for the service catalog items is generated and a notification is sent to the IT approver.
  - After approval is received, the service catalog request is set to **Approved** and the requested item state is set to **Open**.
5. On the day before the employment start date, a welcome email is sent to the new employee's manager. To introduce the new employee, the manager can modify and send this email to the team.
  6. When all generated HR tasks and requested items are completed, the following actions take place.
    - The new employee's HR profile and HR case are updated to set the employment status to **Employed**.
    - The HR case is closed.

---

**Note:** The HR case cannot be closed if any HR tasks or requests are not completed.

---

If the onboarding request is rejected, the following actions occur.

1. The HR case is closed, and the HR profile is set to **Inactive**.
2. A work note is added to the HR profile to note the rejection.
3. An appropriate notification is sent to the creator of the onboarding record.
4. The onboarding process terminates.

## Employee Offboarding HR Workflow

Review detailed information about the predefined HR offboarding workflow process to ensure it meets the needs of your organization. You may need to customize the offboarding workflow or design a new workflow.

To design a new workflow or customize a predefined workflow, you typically work with someone in your organization who has experience with workflow design and customization.

The default offboarding process starts when an offboarding request is submitted from the HR catalog. This creates an HR case for the terminating employee and triggers the Employee Offboarding HR Workflow. If the employee does not have an HR profile record, it is created when the workflow is triggered.

An approval to offboard the employee is requested and an approval request is sent members of the **HR Leadership** group. When an offboarding request is approved, the following actions occur.

1. The **Employment status** for the HR case and the employee's HR profile are both set to **Offboarding**.
2. The state of the HR case becomes **Work in Progress**.
3. The hr\_case.approved fulfillment event occurs. This triggers:

- The Employee Offboarding HR Tasks Workflow to add HR tasks to the HR case. The predefined HR offboarding tasks include the following.
    - Terminate payroll
    - Terminate benefits
    - Conduct exit interview
    - Send departure literature and documentation
  - The `IT Employee Offboarding Action` script action to retrieve the employee's assets by generating tasks for each asset assigned to the employee.
4. When the employment end date is reached and the Employee Offboarding HR Tasks Workflow is completed, the following actions occur.
- The state of the HR case is set to **Closed Complete**.

---

**Note:** The HR case cannot be closed if any HR tasks or requests are not completed.

---

- The employment status for the HR case and HR profile are both set to **Previous employee**.
- The HR case and HR profile are both set to inactive.

If the offboarding request is rejected, the following actions occur.

1. The employment status is set to **Employed** on both the HR case and HR profile.
2. The state of the HR case is set to **Closed Incomplete**.
3. The users assigned to the HR case are notified.

## Employee Change HR Workflow

Review detailed information about the predefined Employee Change HR Workflow to ensure it meets the needs of your organization. The Employee Change HR Workflow is used to request updates to HR profile information that employees and their managers are not authorized to edit.

Typically, organizations allow employees to update certain personal information, but not employment information, which is changed by an HR agent or the employee's manager. For example, the manager updates the profile when the employee is promoted to a new position.

In the Human Resources Configuration, you can select which HR profile fields can be edited. You can select fields for personal and employment information, and other sensitive information. Employees can update any editable personal information field directly in their HR profiles.

The employment information fields that you enable for edit allow an employee's manager to update the field. However, the manager cannot open the employee's HR profile. The manager must submit an employee information change request with the updated information. When the request to change the editable fields is submitted, the HR Employee Change Workflow takes the following actions.

- Opens an HR case.
- Updates the employee's HR profile.
- Closes the HR case.

To update HR profile fields that are not editable, employees or their managers submit an employee information change request. If the specified user has an HR profile, the record producer places the available data into the corresponding fields. The requester updates the fields to be changed and submits the request which launches the following Employee Change HR Workflow.

- Opens an HR case.



- Sends an approval request to members of the HR group. The notification lists the changes that are being requested and contains links to approve or reject the changes.
- If approval is given, the HR profile is updated and the HR case is closed. Because this is a simple HR profile update, no further notifications are sent.
- If the requested changes are rejected, a comment is added to the HR profile to specify who rejected the request, the HR case is set to **Closed Incomplete**, and HR agents assigned to the case are notified.

When an HR agent submits an HR employee change request, such as when an employee or manager calls the HR agent, the HR profile is updated and the case is closed. No notifications are sent.

## Customized profile information

As part of designing the organization's HR processes, you can customize the way HR profile information is processed. Keep in mind that certain fields are synchronized between HR profile and user records.

If you have the hr\_admin role you can customize HR profile information.

### Extend profile information

You can collect additional profile information in a separate table. For example, you can create a Dependents table that extends the HR Profile [hr\_profile] table.

Because profile information is sensitive and confidential, it is secured from being viewed by the system administrator. For more information, see [HR profile security](#) on page 71.

### Associate profiles with user records

An employee's HR profile record must be associated with the employee's record in the User [sys\_user] table, to ensure that both employee records can be accessed conveniently, and to synchronize shared information. During the creation of an HR profile record, you can select the user record to associate with the profile.

With the default employee onboarding process, this association occurs automatically when an onboarding record is created and approved. As a general practice, retain automatic association for onboarding processes you design.

### Synchronize profile and user information

When the user and HR profiles are associated, an update to either the HR profile or the user record updates the corresponding field in the other record automatically.

For example, if an employee's last name changes because of marriage, and an HR manager updates that information in the employee's HR profile record, this change is also applied to the equivalent field in the employee's user record. If you extend the tables and add fields that contain the same information to both tables, ensure that the new field names and types in both tables are identical to enable this synchronization.

---

**Note:** For most synchronized fields, matching is done against the field names within the relevant tables, not against the field labels displayed on the forms. Other fields are synchronized using the business rule.

---

The following fields are synchronized automatically between the HR profile and user records by matching the field names.

- Prefix [introduction]
- First name [first\_name]
- Middle name [middle\_name]
- Last name [last\_name]
- Manager [manager]
- Department [department]
- Location [location]
- Home phone [home\_phone]

The following table describes the other fields that are synchronized by the Synchronize fields to hr\_profile and Synchronize fields to sys\_user business rules.

**Table 10: Fields synchronized using the business rule**

HR profile [hr_profile] field	User [sys_user] field	Notes
Position [position]	Title [title]	Position in the HR profile is a referenced field. If the title is updated in the User form and a position record with the same value does not exist, the user sees a message that the HR profile could not be updated.
Home address [address]	Street [street]	

HR profile [hr_profile] field	User [sys_user] field	Notes
Country [country]	Country code [country]	Although the field names are the same, these fields are of different types. In the HR profile, [country] is a reference field. In the user record, [country] is a choice list. If the country that is selected in the HR profile is not in the choice list, the country code is displayed in the User form instead of the country name.
Work email [work_email]	Email [email]	The HR profile contains both personal and work email fields, while the user record only contains the work email.
Work phone [work_phone] Work mobile [work_mobile]	Business phone [phone] Mobile phone [mobile_phone]	The HR profile contains a personal mobile number field as well as the work mobile phone. The user record only contains one mobile phone number field.

---

**Note:** The User form must be configured to show address, country, email, work phone, and mobile phone fields.

---

# Human Resources administration

You can define and maintain HR organization data that is used for creating and assigning cases.

The following information is set up and maintained as part of administering the Human Resources application.

- Positions that describe employee job functions within the organization
- HR skills that facilitate auto-assignment of HR cases
- Rules that automatically assign cases to specific users or groups
- HR templates and catalog items that are used to create HR cases
- HR profile records

HR managers or administrators set up the information. HR agents can create and maintain HR profile records.

A process must be defined to maintain this data. For example, positions may be redefined, new areas of expertise may be set up within the HR organization, or new HR request processes may be needed. It is important for an HR administrator to define the process and assign responsibility appropriately so the HR data is accurate.

## Define an organization position

As part of the Human Resources setup process, you define positions to describe employee job functions within the organization. Positions are associated with employees in the HR profile.

Role required: admin, hr\_admin, hr\_position\_writer, hr\_agent, hr\_dispatcher, or hr\_manager

Create position records for your organization. Other organization information, such as location and department information, is already set up in the ServiceNow system and used in User [sys\_user] records.

1. Navigate to **Human Resources > Organization > Positions**.
2. Click **New** to create a position, or click an entry to open an existing position.  
If you view an existing position, the **HR Profiles** related list displays HR profiles of users assigned to the position.
3. Enter the **Position** title and select the **Department**.
4. Click **Submit** or **Update**.

## View a location

Location records store the address and contact details for each site in your organization, and are assigned in the employee's HR profile and user records. The location of an HR agent can be used for automatic assignment of HR cases.

Role required: admin or hr\_agent

HR agents can view locations but do not have permission to update them.

1. Navigate to **Human Resources > Organization > Locations**.
2. Click a location name to view details for that location.

## View a department

Departments are assigned in an employee's user profile, and are synchronized to the HR profile.

Role required: admin or hr\_agent

HR agents can view departments but do not have permission to update them.

1. Navigate to **Human Resources > Organization > Departments**.
2. Click a department name to view details for that department.

## HR skills management

Your organization can define HR skills to establish the qualifications of HR staff. Skills can be included in the auto-assignment process used to assign HR agents to HR cases and tasks.

Some HR skills are predefined, and you can create as many other skills as you need. You can assign skills to users or groups. When you assign a skill to a group, the skill is assigned to every group member.

Skills can contain other skills. For example, you may have an **HR Policies** skill that contains **Travel & Expense** and **Corporate Policies** skills.

You can create skills from the Manage HR Skills module in Human Resources or from the Skills application. However, you must use the Skills application to define the skill hierarchy.

### Skills and auto-assignment of HR cases and tasks

In the Configuration module for Human Resources, the **Auto-selection of agents for tasks requires them to have skills** option determines whether the organization is including skills in the auto-assignment of HR cases and tasks. If this option is set to **some** or **all**, then it is important to ensure that the proper skills are defined and assigned to HR staff.

You then assign the necessary skills to the HR case and task templates that are used to create HR cases. For example, an HR task template for submitting a travel & expense policy question is assigned the **HR Policies** and **Travel & Expense** skills. When the template is used to submit an HR case, the auto-assignment process finds an HR agent with one or both of these skills, depending on the configuration setting.

## Create or modify an HR skill

You can create HR skills and assign them to HR staff to assist with the auto-assignment of HR cases and tasks.

Role required: admin or hr\_admin

Skills can contain other skills. For example, you may have an **HR Policies** skill that contains **Travel & Expense** and **Corporate Policies** skills.

The following procedure describes how to create and edit HR skills from the Skills application. Although you can create and edit skills in the **Human Resources > Catalog & Templates > Manage HR Skills** module, you must use the Skills application to assign child skills.

1. Navigate to **Skills > Skills**.
2. Click **New** or open an existing skill.
3. Enter or edit the skill **Name** and **Description**.
4. Save or submit your changes.

5. To associate child skills, complete the following steps.
  - a) In the **Contains Skills** related list, click **Edit**.
  - b) Double-click skills in the **Collection** list to move them to the **Contains Skills List**.
  - c) Click **Save**.

If you add child skills to a skill that is assigned to a group, the child skills are assigned to the members of the group. Messages are displayed to notify you of the group members who were assigned the child skills.

6. To assign users to the skill, complete the following steps.
  - a) In the **Users** related list, click **Edit**.
  - b) Double-click users in the **Collection** list to move them to the **Users List**.
  - c) Click **Save**.

If you add users to a skill with child skills, the child skills are assigned to the user. Messages are displayed to notify you of the skills that were assigned.

7. To associate task models with the skill, complete the following steps.
  - a) In the **Models** related list, click **Edit**.
  - b) Enter a term in the filter field above the **Collections** list to see just the HR models. For example, enter `hr` if this is a standard prefix used to name tasks that are added to HR templates.
  - c) Double-click a model in the **Collection** list to move it to the **Models List**.
  - d) Click **Save**.
8. Click **Submit** or **Update**.

## Assign an HR skill to a group

When you assign skills to HR groups, all members of the group inherit the skills and any child skills.

Role required: admin or hr\_admin

1. Navigate to **Skills > Groups**.

This is the same list that appears under **User Administration > Groups**.
2. Select the HR group that you want to assign skills to.
3. In the **Skills** related list, click **Edit**.
4. Double-click skills in the **Collection** list to move them to the **Skills List**.
5. Click **Save**.

Messages are displayed to notify you of the skills that were assigned to each group member.



Figure 3: Messages displayed for group skill assignment

## Assign an HR skill to a user

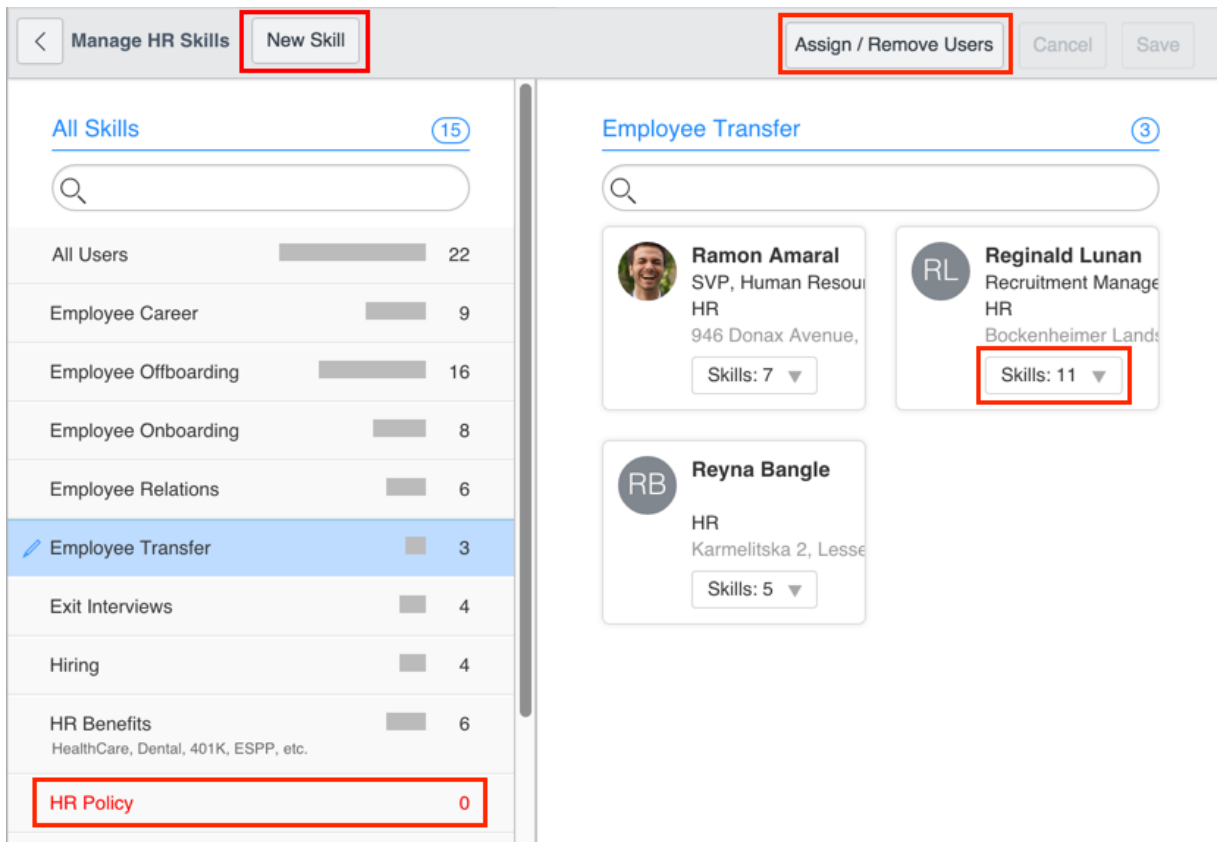
You can assign skills to HR users to facilitate the auto-assignment of HR cases and tasks.

For more information about HR skills and the auto-assignment process, see [HR skills management](#) on page 53.

Role required: admin or hr\_manager

The following procedure describes how to assign HR skills in the Manage HR Skills module. If you want to define a parent and child hierarchy for HR skills, you must use the Skills application.

1. Navigate to **Human Resources > Catalog & Templates > Manage HR Skills**.



**Figure 4: HR skills assignment**

Skills appear on the left. Select a skill to see the assigned users on the right. The user cards indicate how many skills each employee is assigned. If no skills are assigned to a user, the number on the user card is red. Skills with no assigned users are red in the skills list.

2. Select a skill in the **All Skills** list to assign to users.



**3. Click Assign/remove users.**

The list of all users in the HR department appears on the right. Users assigned to the skill are highlighted in blue.

**4. To search for an HR user, type any information, such as name, location, or title, in the search box above the list of users.**

As you type, the list narrows to display user cards that contain those letters in any field.

**5. Perform any of the following actions.**

Option	Description
<b>Assign a user</b>	Click the user card. It is then highlighted in blue.
<b>Unassign a user</b>	Click the highlighted user card. Its highlight is removed.

**6. Click Save.****7. To assign other skills to a user, complete the following steps.**

- Select **All Users** in the list on the left and locate the user on the right.
- Click the arrow next to **Skills: #** in the user card.
- Select the skills for the user, and click **Save**.

**8. To configure skills, perform any of the following actions.**

Option	Description
<b>Add a skill</b>	Click <b>New Skill</b> , enter the skill name and description, and click <b>Submit</b> .
<b>Edit a skill</b>	Click the pencil icon beside the skill name in the <b>HR Skills</b> list. Change the information and click <b>Submit</b> .

## Assignment rules in HR

You can define rules to automatically assign cases to specific users or groups based on the rule conditions.

Assignment rules help quickly assign new or modified HR cases for resolution. For example, an assignment rule could specify that cases submitted by users in Germany are automatically assigned to the HR group in Berlin.

Assignment rules contain the following elements.

- **Applies To:** conditions that must be met for the rule to process.
- **Assign To:** users and groups to assign the case to if the conditions are met.
- **Script:** entry to further customize the assignment rule, if needed.

Assignment rules are applied only when an HR case is submitted and either no template was selected or the **Assignment group** is not assigned by the selected template. In either of these cases, a predefined assignment rule assigns HR cases to the HR group.

If you have more than one HR department, you can remove the HR group assignment from the HR template and use assignment rules to assign the HR group. For example, if you have HR departments in both the U.S. and German offices, you can create an HR group for each office. You set up assignment rules to assign the HR group based on the location of the employee who submitted the HR case.

If your organization is using HR skills to qualify HR case assignments, ensure that the assigned user or group members have the required skills. To determine whether skills are being used and assigned, check the following configuration options.

- **Human Resources > Administration > Configuration:** From the Assignment tab, check **Auto-selection of agents for tasks requires them to have skills**. If **all** or **some** is selected, continue to check the following options.
- **Human Resources > Catalog & Templates > Human Resources Templates:** Look at the template that corresponds to the assignment rule to see what skills, if any, are required.
- **Human Resources > Catalog & Templates > Manage HR Skills:** Find the HR user who will be assigned the case and click the **Skills: #** button to see whether the required skill is assigned. If not, check the box to assign it, and click **Save**.

## Create an HR assignment rule

An assignment rule is used to assign the HR group when it is not assigned from the catalog item template.

Role required: admin, hr\_admin, or hris\_admin

1. Navigate to **Human Resources > Administration > Assignment Rules**.
2. Click **New**.  
By default, the assignment rule is for the HR Task table.
3. Complete the form.

**Table 11: Assignment Rules form**

Field	Description
Name	The descriptive name for the HR assignment rule.
Order	The order in which the rule processes. Rules with lower order numbers are processed first. If a rule is applied, rules with a higher order number are not processed.  For example, an assignment rule with order 100 states to assign the case to a group with the specified skill.  An assignment rule with order 200 states to assign the case to the group <b>HR</b> .  If a group has the specified skill, then it is assigned. If not, then the second rule runs and assigns it to <b>HR</b> .
Active	Check box that specifies the rule is in use.
Applies To	
Table	The table with the records that the assignment rule applies to. The default is the HR Task [hr_task] table.
Conditions	The conditions in which the assignment rule applies.
Assign To	

Field	Description
User	The user to assign to the case when this rule is applied.
Group	The group to assign to the case when this rule is applied.
Script	
Script	<p>A script to define advanced assignment rule functionality. The current.variable_pool set of variables is available.</p> <hr/> <p><b>Note:</b> Two example scripts are provided as a comment. You can modify either script or use the information as a starting point for your own script. Remove the examples when you are finished.</p> <hr/>

#### 4. Click **Submit**.

After creating the assignment rule, you can test it to verify that it works.

## Test an assignment rule

Test a new assignment rule to verify that it works as intended.

Role required: admin, hr\_admin, or hris\_admin

1. Create a new HR case.
2. Fill in the fields with data that matches the assignment rule conditions.
3. Submit the HR case.
4. Reopen the case and check that the correct assignment information was added.

If the correct assignment information was not added, check to see whether you are using HR skills and if the user has the required skills.

- **Human Resources > Administration > Configuration:** From the Assignment tab, check **Auto-selection of agents for tasks requires them to have skills**. If **all** or **some** is selected, continue to check the following options.
- **Human Resources > Catalog & Templates > Human Resources Templates:** Look at the template that corresponds to the assignment rule to see what skills, if any, are required.
- **Human Resources > Catalog & Templates > Manage HR Skills:** Find the HR user who will be assigned the case and click the **Skills: #** button to see whether the required skill is assigned. If not, check the box to assign it, and click **Save**.

After verifying that the necessary skills are assigned to the correct users, test the assignment rule again.

## HR catalog management

The HR catalog contains the catalog items that employees use to request HR assistance. Predefined catalog items have an associated HR case category and HR case template.

You can review and modify the predefined catalog items as needed. You can create new catalog items to use for other types of HR requests that are important to your organization. It is recommended that you maintain a 1:1 relationship between the catalog item, HR case category, and HR case template. Doing so makes it easier to organize items in the catalog, manage case workload, and produce reports. The Manage HR Catalog module lets you create catalog items and automatically create the HR case category and HR case template.

## Terms used with the HR catalog

Several terms used throughout the Human Resources application are synonymous with each other. These items may be referred to one way in the navigator, but when you open the module the name at the top is different. The following list includes those used for items associated with the HR catalog.

**Table 12: Synonymous HR catalog terms**

Term	Synonymous with term
Catalog item	Record producer
HR request	HR case
HR template	Product model or Model
Knowledge article	Knowledge model

It is also important to understand the two types of HR categories.

- HR catalog categories, which are used to group catalog items in the HR Portal or HR Catalog.
- HR case categories, which are used for reporting and selected to assign a template to an HR case. Typically this is used when an HR agent is entering a case for a caller through **Human Resources > Case Management > Create New Case**.

## Catalog item planning and creation

The following outlines a process to use when planning for and creating new catalog items.

1. Define the new catalog item: Determine the purpose of the HR request, and whether it needs variables, tasks, or both.
  - Variables are used to ask questions and to map the answers to fields, such as the comment field.
  - Tasks are used to define work that must be completed in a specified order before the request can be completed. Tasks can be assigned to different HR agents.
2. Create the catalog item: Use the Manage HR Catalog module to create a new catalog item. It provides a simplified form where you enter a name and description, and select a catalog category, assignment group, and default priority.

You can submit or publish the catalog item. If you click **Submit**, the catalog item is saved but is not active. This allows you to update it, for example, to add variables, before you publish it. You can publish the catalog item to make it active immediately.

When you submit or publish in the simplified form, a catalog item, HR case category, and HR case template are all created.

3. Modify the catalog item: After you create the catalog item, you can access the catalog item or the HR case template from the Manage HR Catalog page. Access the HR case template to add fields, define

required skills and assignment group, and add tasks. Access the catalog item to add variables and specify user criteria.

## Manage HR catalog categories

HR catalog categories provide a way to group HR catalog items. For example, the **HR Benefits** catalog category contains catalog items such as **Retirement** and **Vacation**.

Before you create a new HR catalog category, you must determine where employees access it. After you create it, you must add it to the HR Catalog, the HR Portal, or both.

Adding it to the HR Catalog is easy to do, as it is a type of homepage. Adding it to the HR Portal requires knowledge of the Content Management System (CMS). Before you create the catalog category, ensure that you have the proper resources available to update the HR Catalog and HR Portal. If you do not have a CMS developer in your organization, contact ServiceNow customer support.

Role required: admin, hr\_manager, or hr\_admin

1. Navigate to **Human Resources > Catalog & Templates > Manage HR Catalog**.
2. To create or modify a catalog category, perform one of the following actions.

Option	Description
<b>Create a catalog category</b>	Click <b>New Category</b> , enter the category name and description, and click <b>Submit</b> .
<b>Edit an existing catalog category</b>	Point your cursor to the category and click the edit icon. Modify the category or description fields as needed and click <b>Submit</b> .

For information about making the new category available in the HR catalog, see [Add a new HR catalog category to the HR Catalog](#) on page 61.

3. To assign HR catalog items to a category, select the HR category in the list on the left and complete the following steps.
  - a) Click **Assign / Remove Catalog Items**.
  - b) Select the catalog items to assign and deselect catalog items to remove.
  - c) Click **Save**.
4. To assign a category to a catalog item, select **All Catalog Items** in the list on the left and complete the following steps.
  - a) Locate the catalog item on the right and open the **Categories** choice list.
  - b) Select the categories to assign the catalog item, and deselect the categories to remove the assignment.
  - c) Click **Save**.

## Add a new HR catalog category to the HR Catalog

After you create a new HR catalog category, you must add it to the HR Catalog to make it visible to employees.

Role required: admin, hr\_manager, or hr\_admin

If you create a new HR catalog category, you must add it to the HR Catalog, the HR Portal, or both to be visible to your employees. Adding it to the HR Catalog is easy to do, as it is a type of homepage.

Adding it to the HR Portal requires a developer's knowledge of the Content Management System (CMS). If you do not have a CMS developer in your organization, contact ServiceNow customer support.

To add the new HR catalog category to the HR Catalog, complete the following steps.

1. Navigate to **Human Resources > HR Catalog**.
2. Click the plus icon on the upper right.  
The **Sections** dialog box opens.
3. Select the HR category, and then click the drop zone to place it.  
Drop zones are identified by the words **Add here**. As you make changes, they appear on the page so you can preview the change.
4. Click the **(X)** icon to close the dialog.
5. Optional: To move the new category on the page, drag it to its new location.

## Create an HR catalog item

You can create an HR catalog item from the Manage HR Catalog module.

Role required: admin, hr\_manager, or hr\_admin

When you create a new HR catalog item from the Manage HR Catalog module, an associated HR case category and HR case template are created automatically.

1. Navigate to **Human Resources > Catalog & Templates > Manage HR Catalog**.
2. Click **New Catalog Item**.
3. Enter the catalog item **Name** and **Short description**.  
The short description is used to help the employee make a selection from the HR catalog. It also appears in the **Short description** field when an employee selects the catalog item.
4. Select the **Catalog category** from the choice list.
5. Optional: Select the HR **Assignment group** to enable an HR agent to be auto-assigned when this catalog item is submitted.
6. Optional: Change the **Priority** to prioritize HR cases higher or lower.
7. Click **Publish** to save the catalog item and make it available for use immediately.  
If you click **Submit**, the catalog item is saved but is not active. You can update it to add variables before you publish it.  
The following three items are created.
  - Catalog item that includes the **hrsm\_benefit\_questions** variable set. The defined fields include **Opened for**, **Priority**, **Short description**, and **Question**. Contextual search of the knowledge base is enabled also for the **Short description** field.
  - HR case category with the name of the catalog item.
  - HR template with the name of the catalog item.

To customize the new, published catalog item, by adding variables, click the edit icon that appears when you hold your cursor over it. Follow the steps in [Modify an HR catalog item](#) on page 63. If you submitted the catalog item without publishing it, its listing has a gray background. When you edit it, be sure to check **Active** to enable it for use.

To edit the associated HR case template, you can click the template icon next to the edit icon. Follow the steps in [Modify an HR case template](#) on page 64.

## Modify an HR catalog item

An HR catalog item is a record producer that enables users to submit HR requests from the HR catalog. You can modify catalog items.

Role required: admin, hr\_manager, or hr\_admin

The easiest way to create new catalog items is from the Manage HR Catalog module. When you create a catalog item, an associated HR case category and HR template are also created. You can then customize the catalog item.

Some catalog items are predefined. Before you customize the predefined **Employee information change**, **Employee onboarding**, or **Employee offboarding** catalog items, review the following variable conditions.

**Table 13: Variables in catalog items**

Catalog item	Description
Employee onboarding	Ensure the following variables are entered in the catalog item to correctly populate corresponding mandatory fields in the HR profile: <b>First name</b> , <b>Last name</b> , and <b>Personal email</b> .
Employee offboarding	Ensure the following variables are entered in the catalog item: <b>Employee to offboard</b> , <b>Offboard type</b> , and <b>Employment end date</b> .
Employee information change	Ensure the variable names match the field names on the HR Profile table to allow automated updates of shared data through the Employee Change HR Workflow process.

You can edit a catalog item after you create it in the Manage HR Catalog module. If you click the edit catalog item icon, it opens the same form described in the following steps.

1. Navigate to **Human Resources > Catalog & Templates > Maintain Catalog Items**.
2. Open the catalog item to customize.
3. Modify the catalog item as needed, and do not change the **Model**, which is the HR case template.

The **Category** selection in the Accessibility section identifies where the catalog item you are creating appears in the catalog, for example, under Requests or Benefits.

4. In the **What it will contain** section, make sure the **Script** field includes one of the following scripts based on the HR case type.

Option	Description
<b>Case Management</b>	<pre>hr_Factory.wrap (current, gs).configure (producer, "case_management", "&lt;HR category&gt;");</pre>
<b>Employee Change</b>	<pre>hr_Factory.wrap (current, gs).configure (producer, "employee_change", "&lt;HR category&gt;");</pre> <p><b>Note:</b> Employee change case type is used for the employee onboarding, offboarding, and information change catalog items.</p>

Where `<HR category>` is the case category, such as Onboarding or Benefits, that is displayed in the **Category** field of a case opened from this catalog item. When you create a new catalog item, the default script must be replaced with one of the scripts listed above.

5. Verify that variable names match column names in the HR Profile [hr\_profile] table. For example, to have a `personal_email` catalog item variable, there must be a matching field named `personal_email` in the `hr_profile` table.
- This ensures that the value entered in the catalog item is automatically populated in the HR profile and corresponding HR case.
6. Click **Update**.

## Modify an HR case template

HR case templates are used to create HR catalog items. HR case templates specify what actions are taken when a certain type of HR case is submitted.

Role required: admin or model\_manager

Several predefined HR case templates are used in HR catalog items. You can modify the predefined HR case templates or create ones.

The easiest way to create catalog items is from the Manage HR Catalog module. When you create a catalog item, an associated HR case category and template are also created. You can then customize the HR case template, for example, to add variables. The following list includes ways to customize an HR case template.

- Specify required skills and assignment group or user.
- Define tasks for HR agents that must be completed.
- Define the order of task completion by assigning a task dependency.

A template can have attached knowledge models. A knowledge model is a knowledge article that is associated with the template. When a new case is created, the knowledge article is automatically assigned to the case to provide information to the HR agent.



You can edit an HR case template after you create the catalog item in the Manage HR Catalog module. If you click the edit HR case template icon for the new catalog item, it opens the same form described in the following steps.

1. Navigate to **Human Resources > Catalog & Templates > Human Resources Templates**.  
The Product Models list opens and displays both HR case and HR task templates. Look at the **Model categories** field to determine whether you are opening an HR case or HR task template.
2. Open an HR case template to modify.  
If you are creating a template from the list, select **HR Case Model** in the Interceptor page.
3. Complete the form or edit the fields.  
As you enter information, you can click the min and max buttons to the right of the **Name** field to collapse and expand the displayed fields. The fields listed in the table are from the HR case template that is automatically created with a catalog item from the Manage HR Catalog module.

**Table 14: HR case template fields**

Field	Description
Name	Unique and descriptive name for this template.
Short description	Content that is copied into the <b>Short description</b> field of an HR request when this HR case template is used to submit an HR request from the associated catalog item.
Description	Detailed description copied into an HR request created from this template.
Checklist template	An informal list of questions or tasks used as a reminder for the HR agent working on this case.
Workflow	The workflow used to process an HR case from this template.
Billable	Does not apply to HR cases.
Assignment group	The HR group to assign to a case or task when this template is used. The HR group provides the list of HR agents for auto-assignment.
Skills	The skills that the HR agent must have to be assigned to this case or task. Select as many skills as are needed. Click away from the selection list to close it. Your organization configures whether to use skills for auto-assignment.
Priority	The default priority when the HR request is created from this template.
The following field is used in several of the predefined templates. Edit fields and add this field to the template to use it in a new catalog item.	

Field	Description
Suspended reason	The information required to complete this task for which the HR agent may need to suspend the parent HR case. Selecting one of the following options places the associated related link in the HR task. <ul style="list-style-type: none"> <li>• <b>User:</b> Request additional user info</li> <li>• <b>Document:</b> Request document</li> <li>• <b>Other, Company, Group:</b> Suspend case</li> </ul>

Table 15: Task information

Field	Description
Copy Task Template	The task template to use for this task, if any. Click the link, and then select the template from the choice list.
Task type	The type of task. <b>HR Task</b> should be selected.
Name	Unique and descriptive name for the task. When entering a name for a new task, fields for an extra task appear. <p style="text-align: center;"><b>Note:</b> If you enter information in any of the other fields for a task, the <b>Name</b> field is required.</p>
Description	Content that is copied into the description of the task when this HR case template is used.
Depends on	The task that must be completed before this task can be performed. Options appear in this list after you have created subsequent tasks.
Checklist template	An informal list of questions or tasks used as a reminder for the HR agent working on this task.

4. To add more fields for either the request or task sections, complete the following steps.
  - a) Click **Edit Fields**.  
An **add field** choice list appears in the **Request information** and **Task information** sections.
  - b) Select the field to add.  
The field is added to the form and you can add more fields, if desired.
5. To attach a knowledge model to the template, scroll to the **Model knowledges** related list.
6. Complete the following steps for every knowledge model to add.
  - a) Click **New**.
  - b) Click the lookup icon beside the **Knowledge** field.

- c) Locate the knowledge article to add and click its number.
- d) Click **Submit** in the **Model Knowledge** form.

7. Click **Save**.

A new HR task template is created for each HR task you added to the HR case template.

## Modify an HR task template

HR task templates are created automatically when you add tasks to an HR case template. HR task templates allow you to define assignment rules for the HR tasks.

Role required: admin or model\_manager

Several HR task templates are predefined. Or, you can create HR case templates with associated HR tasks.

1. Navigate to **Human Resources > Catalog & Templates > Human Resources Templates**.  
The Product Models list opens and displays both HR case and HR task templates. Look at the **Model categories** field to determine whether you are opening an HR case or HR task template.
2. Open an HR task template to modify.
3. Edit the fields as needed.

**Table 16: HR task template fields**

Field	Description
Display name	Read-only field that is populated from the <b>Name</b> field when the template is saved.
Name	Unique and descriptive name for this template.
Checklist template	An informal list of questions or tasks used as a reminder for the HR agent working on this task.
Short description	Content that is copied into the <b>Short description</b> field of an HR task when this template is used.
Description	Information about this HR task template.
Task template	A task template to use as a starting point for this template.

4. To assign this HR task template to other HR case templates, complete the following steps.
  - a) In the **Task Model** related list, click **Edit**.
  - b) Double-click an HR case template in the **Collection** list to move it to the **Task Model List**.
  - c) Click **Save**.
5. Click **Update**.

## View or modify HR case categories

You can view and modify the HR case categories that are created automatically when you create a new catalog item in the Manage HR Catalog module.

Role required: admin or hr\_admin

In the Human Resources application, there is a 1:1 relationship between a catalog item, an HR case category, and an HR case template. If an HR agent creates a new HR case without using a catalog item, selecting the category also selects the associated template. This populates some fields in the form, such as assignment group. Use the Manage HR Catalog module to view case categories and modify them as necessary.

1. Navigate to **Human Resources > Catalog & Templates > HR Categories**.
2. Select the category to view or modify.  
You can create a new HR case category, but it is recommended that you use the Manage HR Catalog module to create catalog items and associated categories.
3. Review the details and edit them as needed.  
If you need to change the template, only templates that are not assigned to a category are listed. The HR case type is useful for filtering reports.
4. Optional: To disable a category you no longer use, clear the **Active** check box.
5. If you made changes, click **Update**.

## HR case categories

HR case categories are associated with HR catalog items. There is a one-to-one relationship between HR case categories and HR catalog items.

The following HR case categories are predefined. Administrators can create new HR categories in the HR Categories module and define catalog items to use the categories. New catalog items can be created in the Manage HR Catalog module, and the associated HR case category is created automatically.

**Table 17: HR categories**

Category	Description	Example
401(k)	Ask about the 401(k) plan.	How much can I contribute from each paycheck?
Career guidance	Ask a question regarding your career path.	What do I have to do to get a promotion to senior level?
Employment verification	Request an employment verification letter.	I need a letter sent to my bank to verify employment for my loan.
General	Ask a general question for which a specific record producer does not exist.	Does the company organize an end of year party for its employees?
Grievance	Ask for redress of a grievance.	My office mate talks on the speaker phone and I can't concentrate on my work.
Leave	Ask about taking time off that is not vacation time.	How do I arrange for paternity leave?

Category	Description	Example
Life events	Ask about what to do after getting married.	How do I change my name in the system?
Medical/dental/vision	Ask about health benefits.	Can I add my spouse to the vision plan?
Payroll questions	Ask a question about payroll or salary.	On what day of the month does my account get credited?
Retirement	Ask about retirement benefits.	What is the minimum age at which I can retire?
Tuition	Request tuition reimbursement.	Please reimburse me for the class I just completed.
Vacation	Ask about taking vacation time.	When will I begin to earn more vacation per year?
Employee change	Ask for an update to the HR profile.	How do I change my employee's status from temp to permanent?
Offboarding	Complete tasks to close a terminating employee's accounts and retrieve company assets.	An employee resigns.
Onboarding	Complete tasks to set up accounts for a new employee and provide company assets, such as a computer.	A new employee is hired.

## Configure the employment verification letter

One of the predefined catalog items is the request for an employment verification letter. A PDF file is generated from information in the HR profile and the employment verification request. You configure the employment verification template with your company information and logo.

Obtain the following items and information.

- A page of your company letterhead.
- A copy of your current employment verification letter template, if available. It should contain the company contact information that the third party who is requesting the employment verification letter should contact with questions.
- The logo image to use in your header. The header image can be a maximum of 50 px high. If your letterhead includes a logo and text, ensure that the logo image includes the text, as you can only configure the image in the header.
- The logo image to use in your footer, if applicable. The logo image can be a maximum of 15 px high. You can configure both an image and text in the footer.

Role required: admin, hr\_manager, or hr\_admin

1. Navigate to **Human Resources > Catalog & Templates > Employee Verification Template**. The template opens with configurable areas for the header, body, and footer. The letter body is a WYSIWYG text editor. Variable fields in the body are enclosed in curly brackets, such as {{Date}}.
2. To add a header image, such as your logo, complete the following steps.

- a) Next to **Header image**, select **Click to add**.
  - b) Click **Choose File** and select the header logo image from your computer, then click **OK**.
  - c) From the **Image position** list, select the position of the logo.
3. To edit the body, perform the following steps.
- a) Review the text and update it with the text from your current employment verification letter template.
  - b) Add any additional variables as needed. The following list contains all variables that you can add.

{{Date}}	{{Work email}}	{{Department}}
{{Name}}	{{Work phone}}	{{Employee number}}
{{Position}}	{{Prefix}}	{{Employment status}}
{{Time type}}	{{Nationality}}	{{Employment type}}
{{Employment start date}}	{{Manager}}	{{Gender}}

To modify the list of available variables, edit the `generalhrform` script include.

- c) Optional: Use the formatting tools to perform any of the following actions.

Format the text	Select the text to format and apply any of the formatting options, such as bold, italic, underline, font styling. You can apply justification, bullets, and numbers as needed.
Add an image	Click the image icon and attach the image or search for it in the image library. You can also add a new image to the library.

4. To configure the footer, perform the following steps.
- a) If you have a footer image, select **Click to add** next to **Footer image**.
  - b) Click **Choose File**, select the footer logo image from your computer, then click **OK**.
  - c) From the **Image position** list, select the position of the logo.
  - d) Enter the footer text, if applicable.  
The footer text appears based on the selected footer image position. If you selected to position the image on the right or centered, the footer text is left-justified. If you selected to position the image on the left, the footer text is right-justified. If there is no footer image, the footer text is center-justified.
  - e) Select the page size.
5. Click **Update**.

Review the look of the generated letter by impersonating an employee and submitting the Employment Verification catalog item. Impersonate the user assigned to work on the case to generate the letter within the HR case. Continue editing and testing the employee verification letter template until you are satisfied with the generated PDF.

## HR profile records

HR profile records store confidential employee data, such as name, personal contact information, email addresses, and emergency contacts.

HR profile records enable the organization to access and track employee information throughout the period of employment and beyond. HR profile records are associated with user records, but unlike user records, HR profile records are stored confidentially and are not publicly viewable.

HR profile records may be created as part of an HR process, such as the onboarding process. The default onboarding process creates an HR profile record for the new employee and automatically associates this to the employee's user record when the onboarding case is approved.

Organizations can use an integration method to populate HR profile records from their employee database. Workday integration is available. In addition, when a new HR case is created through the Create New Case module, the **Create Profile** button lets you generate an HR profile for the selected user.

Besides basic user information that is also in the user record, the HR profile includes the following sections and related lists.

**Table 18: HR profile sections and related lists**

Section or related list	Description
Notes	Comments and work notes.
Employment Information	Information such as employment status and type of employment, employee number, and start and end dates.
Contact Information	Information such as address, phone number, personal email address. Some field values are copied from the onboarding form or from Workday if that integration is being used.
Emergency Contacts	A list of the employee's emergency contacts. One contact in the list is designated as the primary and others can be entered as alternates.
Employment History	List of prior employers and dates of employment.
The following related lists are automatically populated. You can view records in the list, but you cannot enter new records from the related list.	
Direct Reports	List of the employees who report directly to the user.
Colleagues	List of other employees who have the same manager as the user.
Cases	Open HR cases for the user.

## HR profile security

Because HR profile information is sensitive and confidential, it is secured from being viewed by the system administrator.

In the system, system administrators with the admin role are able to perform all tasks and view all data. However, HR profile information is confidential and should be viewed only by authorized HR personnel who are assigned a role that includes hr\_profile\_reader or hr\_profile\_writer, such as hr\_agent.

Therefore, access to specific HR profile data is restricted from view by users with the admin role. This restriction includes the **Description** field of HR cases and HR tasks, as the field often contains HR profile information when a request is submitted through the HR Portal.

## HR profile information that system administrators can access

System administrators cannot create a new HR profile. They can see the list of HR profiles and open HR profile records, but have access only to the following information.

- The HR profile number and employee's prefix.
- Employment information that is synchronized with the user record [sys\_user]. This includes name, employee number, department, manager, and location.
- Work contact information, such as work email address and work phone number. Personal information is hidden.
- Comments. Work notes are hidden.
- Information that appears in the following related lists.
  - Emergency Contacts
  - Employment History
  - Direct Reports
  - Colleagues
  - Cases

## Impersonating a user

If the system administrator impersonates a user, even if the impersonated user has an HR role that allows access to the HR profile, the system administrator is restricted from viewing HR profile information. The following constraints are applied when a user is impersonated.

- If the impersonated user has HR profile access, the HR profile list displays a message that the records are removed based on security constraints. No HR profile records are listed.
- For any impersonated user, the **My HR profile** link from the HRSM Portal displays no profile information. It displays only information in the related lists described above.

## Customized profile information

As part of designing the organization's HR processes, you can customize the way HR profile information is processed. Keep in mind that certain fields are synchronized between HR profile and user records.

If you have the hr\_admin role you can customize HR profile information.

### **Extend profile information**

You can collect additional profile information in a separate table. For example, you can create a Dependents table that extends the HR Profile [hr\_profile] table.

Because profile information is sensitive and confidential, it is secured from being viewed by the system administrator. For more information, see [HR profile security](#) on page 71.

### **Associate profiles with user records**

An employee's HR profile record must be associated with the employee's record in the User



## Synchronize profile and user information

[sys\_user] table, to ensure that both employee records can be accessed conveniently, and to synchronize shared information. During the creation of an HR profile record, you can select the user record to associate with the profile.

With the default employee onboarding process, this association occurs automatically when an onboarding record is created and approved. As a general practice, retain automatic association for onboarding processes you design.

When the user and HR profiles are associated, an update to either the HR profile or the user record updates the corresponding field in the other record automatically.

For example, if an employee's last name changes because of marriage, and an HR manager updates that information in the employee's HR profile record, this change is also applied to the equivalent field in the employee's user record. If you extend the tables and add fields that contain the same information to both tables, ensure that the new field names and types in both tables are identical to enable this synchronization.

---

**Note:** For most synchronized fields, matching is done against the field names within the relevant tables, not against the field labels displayed on the forms. Other fields are synchronized using the business rule.

---

The following fields are synchronized automatically between the HR profile and user records by matching the field names.

- Prefix [introduction]
- First name [first\_name]
- Middle name [middle\_name]
- Last name [last\_name]
- Manager [manager]
- Department [department]
- Location [location]
- Home phone [home\_phone]

The following table describes the other fields that are synchronized by the Synchronize fields to hr\_profile and Synchronize fields to sys\_user business rules.

**Table 19: Fields synchronized using the business rule**

HR profile [hr_profile] field	User [sys_user] field	Notes
Position [position]	Title [title]	Position in the HR profile is a referenced field. If the title is updated in the User form and a position record with the same value does not exist, the user sees a message that the HR profile could not be updated.
Home address [address]	Street [street]	
Country [country]	Country code [country]	Although the field names are the same, these fields are of different types. In the HR profile, [country] is a reference field. In the user record, [country] is a choice list. If the country that is selected in the HR profile is not in the choice list, the country code is displayed in the User form instead of the country name.

HR profile [hr_profile] field	User [sys_user] field	Notes
Work email [work_email]	Email [email]	The HR profile contains both personal and work email fields, while the user record only contains the work email.
Work phone [work_phone] Work mobile [work_mobile]	Business phone [phone] Mobile phone [mobile_phone]	The HR profile contains a personal mobile number field as well as the work mobile phone. The user record only contains one mobile phone number field.

---

**Note:** The User form must be configured to show address, country, email, work phone, and mobile phone fields.

---

## Create or modify an HR profile

Employees can directly edit some information in their HR profile, such as emergency contact information, but they are restricted from editing certain fields. If employees want to change information that they are restricted from editing, they must submit requests to HR for the changes.

Role required: hr\_profile\_writer, hr\_agent, or hr\_manager

The HR administrator [hr\_admin] can configure which HR profile fields an employee can update. An update to information that the employee cannot update requires that the employee enter an HR employee information change request. To update the HR profile when an employee information change request is assigned to you, complete the following steps.

1. Navigate to **Human Resources > Organization > HR Profiles**.
2. Click **New** or click a profile number to open an existing user profile.
3. If you are creating a new HR profile, select the user in the **User** field.  
You cannot change the user after an HR profile is saved.  
The name, manager, department, location, and work email fields are populated from the user record.
4. Complete or update the form with as much additional information as you have.

Table 20: HR profile sections and related lists

Section or related list	Description
Notes	Comments and work notes.
Employment Information	Information such as employment status and type of employment, employee number, and start and end dates.
Contact Information	Information such as address, phone number, personal email address. Some field values are copied from the onboarding form or from Workday if that integration is being used.
Emergency Contacts	A list of the employee's emergency contacts. One contact in the list is designated as the primary and others can be entered as alternates.
Employment History	List of prior employers and dates of employment.
The following related lists are automatically populated. You can view records in the list, but you cannot enter new records from the related list.	
Direct Reports	List of the employees who report directly to the user.
Colleagues	List of other employees who have the same manager as the user.
Cases	Open HR cases for the user.

5. Click **Submit** or **Update**.

---

**Note:** Some HR profile information, such as department, is synchronized between the User [sys\_user] and HR Profile [hr\_profile] records. Updating information in one record automatically applies the updates in the other record.

---

## Update your HR profile

Employees can update some of the information in their HR profile, including some personal information, contact information, emergency contacts, and employment history.

The HR administrator configures which personal information fields are editable by the employee. For example, employees may be allowed to update their date and place of birth. Fields that are not editable are disabled when employees view their HR profiles.

1. Navigate to **Self-Service > HR Portal**.
2. Click **My HR profile** in the **My Stuff** category.
3. Add or update your personal information.
4. To add or update your contact information, select the **Contact Information** tab and enter the information.
5. Click **Update**.

## Add your emergency contact

Employees can add information to their HR profile about who to contact in case of an emergency.

1. Navigate to **Self-Service > HR Portal**.
2. Click **My HR profile** in the **My Stuff** category.
3. In the **Emergency Contacts** related list, click **New**.
4. Enter the contact's name, telephone numbers, and other information.
5. Select the priority of the contact, **Primary** or **Alternate**.
6. Click **Submit**.

## Add your employment history

Employees can add employment history information about an their previous employment, including company name, employment dates, and position held.

This information is typically provided by new employees as part of the onboarding process to allow HR staff to conduct reference and background checks. All employees can update their HR profiles with employment history.

1. Navigate to **Self-Service > HR Portal**.
2. Click **My HR profile** in the **My Stuff** category.
3. Click **New** in the **Employment History** related list.
4. Enter the company name and any other information you have about the former employment.
5. Click **Submit**.

## View the user directory

The HR user directory is a view of the corporate user directory with HR case information in a related list.

Role required: admin, hr\_admin, hr\_agent, or hr\_manager

The corporate user directory refers to the records in the User [sys\_user] table.

1. Navigate to **Human Resources > Organization > User Directory**.
2. Click a user record to view or edit the Human Resources view of that user's record.
 

This view is a subset of the user information, including job information and contact details. In addition, there are two related lists:

  - **HR Cases:** lists all of that user's HR cases.
  - **Users:** lists users who are managed by that user.

## HR surveys

HR surveys let users rate their satisfaction with HR case resolution, and provide management with feedback to improve HR processes.

Two predefined HR surveys are provided: HR Request Satisfaction Survey and HR Exit Survey. HR administrators and HR managers can edit HR surveys and the associated trigger conditions.

The HR Request Satisfaction Survey is triggered randomly for 50% of closed or canceled cases. Users receive an email with the survey link after they accept the resolution or when the HR case is canceled.

The HR Exit Survey is triggered for employees in the offboarding process. It is sent to all offboarding employees when the HR task state is **Work in Progress**.

HR managers and administrators can review responses by question and see a scorecard. Comments entered by users provide feedback that can be used to improve the performance of HR case management. The following survey options can be configured.

- The look and feel of the questionnaire, for example, by adding the company logo.
- Conditional questions that appear when users answer other questions in a certain way.
- The trigger condition, for example, to send it for every case or to a lower percentage of users.

With trigger conditions, the system generates a survey instance each time a specific action occurs on a given table, such as when an HR request closes. You can choose to send a survey every time the condition is met, or set a probability for the system to send a survey at random when the condition is met. Trigger conditions are ideal for sending surveys to measure satisfaction with a recent experience, such as closing an HR request.

For more information, see [Survey designer](#)

## Create or modify an HR survey

You can modify the predefined HR satisfaction surveys to suit the organization's needs, and create new HR surveys.

Role required: admin, hr\_admin, or hr\_manager

For example, you may want to create an HR survey to gauge the satisfaction for more complex HR processes, such as onboarding.

The following steps describe how to work with survey questions in the Survey Definition form. You can also click **Survey Designer** to open the survey and its questions in the survey designer. When you save the survey, the survey definition is automatically added.

1. Navigate to **Human Resources > Surveys > HR Surveys**.
2. Click **New** or open an existing survey.
3. Complete the form.

**Table 21: Survey Definition form**

Field	Description
Name	Name of the survey, which appears on the questionnaire.
Description	Helpful information about the survey.

Field	Description
Signature	<p>Acknowledgement by a survey recipient of requirements, admonitions, or policies related to the survey. The signature might require the recipient to select a check box or type a full signature to verify having read these assertions. You can display assertions without requiring a signature. Select an existing signature from the list or click <b>New</b> to create a new one. The signature form contains these fields:</p> <ul style="list-style-type: none"> <li>• <b>Name:</b> Descriptive name for this signature.</li> <li>• <b>Signature type:</b> Type of signature required. The selections are <b>Check box</b>, <b>Full name</b>, or <b>Assertion only</b>. If <b>Assertion only</b> is selected, no signature is required to submit the survey.</li> <li>• <b>Assertion:</b> Text you want to display to recipients.</li> </ul> <p>By default, a property called Require authentication for user signature is configured to require users to authenticate when providing a full name signature.</p>
Active	<p>Check box for activating the survey definition. When the <b>Active</b> check box is cleared, new survey instances cannot be generated and users cannot complete existing survey instances. Use the <b>Active</b> check box to deactivate or activate a survey that is published.</p>
Anonymize responses	<p>Check box for ensuring that all responses for this survey are stored without the submitting users' names. When a user submits a survey, the system clears the <b>Assigned to</b> field for the associated survey instance. Additionally, survey responses for anonymous surveys do not contain <b>Assigned to</b> values.</p>
State	<p>Status of the survey: <b>Draft</b> or <b>Published</b>.</p>

Field	Description
Schedule period	Option that determines how often a user can take the same survey and whether the system generates survey instances on a schedule.  <b>Note:</b> If you use a trigger condition for a survey, ensure the schedule period is set to No Limit. Trigger conditions use a different method to regulate how often users can receive survey instances.
Introduction	Introductory content to display on survey questionnaires. Consider adding a company logo, a welcome message, background information about the survey, or instructions.
End note	Content to display on the screen that appears when someone submits a survey questionnaire. Consider adding a thank you message, follow-up instructions, or other applicable information.

4. Click **Submit** or **Update**.
5. To add the new survey to the list of HR surveys, complete the following steps.
  - a) Click the **Manage HR surveys** related link.  
The SM Configuration - Human Resources [Survey view] form opens.
  - b) Click the lock icon beside **Surveys**.
  - c) Click the lookup icon below the list of HR surveys to open the pop-up survey selection window.
  - d) Select the new HR survey you added.
  - e) Click **Update**.

For more information, see [Survey designer](#)

## Create or modify HR survey categories and questions

When an HR survey definition is created, a survey category is automatically added. You can create questions that are associated with this category or define another category for questions.

Familiarize yourself with the question data types before you begin entering questions.

Role required: admin, hr\_admin, or hr\_manager

For example, the HR Request Satisfaction Survey has one category, with four questions about satisfaction with the HR request process. You can define another category to ask about satisfaction with the HR agent who handled the case, or you can add more questions to the existing category.

The following steps describe how to work with survey questions in the Survey Definition form. You can also click **Survey Designer** to open the survey and its questions in the survey designer.

1. Navigate to **Human Resources > Surveys > HR Surveys**, and open the survey to add questions.
2. In the **Metrics Categories** related list, complete one of the following actions.



Option	Description
<b>Add or edit questions in an existing category</b>	Click the category name.
<b>Add a category and questions</b>	Click <b>New</b> . Enter the category name and description, right-click the form header, and click <b>Save</b> .

The Survey Category form that appears includes the **Assessment Metrics** related list, which contains any questions that are already defined.

3. To edit a question, complete the following steps.
  - a) Click the question text and edit the fields on the form.
  - b) Click **Update**.
  - c) If required by the question type, add definitions in the **Assessment Metric Definitions** related list.  
For example, Likert and numeric scale data types require the scale metric definitions.
  
4. To add a question, complete the following steps.
  - a) Click **New** and complete the form.
  - b) Right-click the header and click **Save**.  
Additional fields may appear based on the selected data type. For example, if you select **Choice**, you must enter the scale definition.
  - c) If applicable, add definitions in the **Assessment Metric Definitions** related list.  
For example, the Choice data type requires that you enter the choices.
  
5. Click **Update**.  
The Survey Definition reopens.

For more information, see [Survey designer](#)

## Publish a new HR survey

You must publish a new survey before users can complete it.

Role required: admin, hr\_admin, or hr\_manager

After a survey is published, you can edit it and it remains published. The **State** field on the Survey Definition form indicates whether the survey is published.

1. Navigate to **Human Resources > Surveys > HR Surveys**, and open the survey to publish.
2. Click **Publish**.

If there are assigned users, the system automatically generates a survey instance. You can click **Send Invitations** to send a notification to the assigned users with a link. Assigned users can also navigate to **Self-Service > My Assessments and Surveys** to take the survey.

---

**Note:** A survey cannot be returned to the **Draft** state after it has been published. You can, however, deactivate a survey by clearing the **Active** check box.

---

If you want employees to receive a link to a survey, such as the HR Request Satisfaction Survey, create a notification. To get the URL of the published survey so it can be included in the notification, click the **View Survey URL** related link. You can copy the URL and paste it as a hyperlink in the notification.

For more information, see [Email notifications](#).

## Create a trigger condition for an HR survey

When you create a new HR survey, you can add a trigger condition to specify when the survey is sent and to whom.

Role required: admin, hr\_admin, or hr\_manager

Trigger conditions are ideal for sending surveys to measure satisfaction with a recent experience, such as closing an HR request. Some of the descriptions below use the Incident table as an example; substitute HR case information to create an HR survey trigger condition.

1. Navigate to **Human Resources > Surveys > Trigger Conditions**.
2. Complete the form.

**Table 22: Trigger condition fields**

Field	Description
Assessment	Survey to send.
Table	Table to run the trigger condition on. You can select only tables in the current application scope. For example, to send a survey whenever an incident closes, select the Incident [incident] table.
User field	Field that stores the users you want to send the survey. You can select any field, on the selected table or on a referenced table, that references the User [sys_user] table. Use the tree picker to select a field.
Repeat interval	Minimum period that must pass before the trigger condition can resend the survey to the same user. For example, assume the repeat interval is set to 30 days. Even if the same user qualifies for multiple surveys from this trigger condition, the system can send her only one survey every 30 days.  <b>Note:</b> Ensure that the Schedule period of the selected survey definition is set to <b>No Limit</b> . If the schedule period is set to a different value, it may prevent the trigger condition from sending surveys as expected.
Active	Check box that determines whether this trigger condition is active (selected).
Business rule	[Admin only] Business rule the system creates to monitor the selected table. When the condition is met, the business rule sends the survey to the correct user. No configuration is necessary for this business rule.

Field	Description
Trigger randomly	Check box that determines whether to send the survey to the appropriate user every time the condition is met (cleared) or only a percentage of the time (selected).
Probability (%)	Approximate probability that the survey is sent each time the condition is met. For example, if the probability is set to 50, the system sends the survey approximately 50% of the time the conditions are met, assuming there are no repeat interval restrictions. This field is visible and required only when Trigger randomly is selected.
Related Field 1- 4	<p>Field that contains a value you want to store for reporting purposes. You can pick any reference field on the selected table. When the trigger condition generates a survey instance, the system stores the value from the triggering record. Specify up to four fields.</p> <p>For example, if you select the Incident table, you might select <b>Assigned to</b> and <b>Problem</b> as related fields. The system stores the assigned user and problem associated with the incident as Related record 1 and Related record 2 in the survey instance record. To view the fields, configure the form for any survey instance.</p> <hr/> <p><b>Note:</b> You cannot use a related field for the ticket number because you cannot select the Number column. You can, however, use the trigger_id column of the table.</p> <hr/>
Description	Summary information to identify the trigger condition.
Condition	Condition builder that defines the criteria that must be true to send the survey. For example, to send a survey whenever an incident closes, create the condition <b>[State] [is] [Closed]</b> .

3. Click **Submit**.

## Manage the HR chat queue

You can configure the HR department chat queue and review the chat records to measure how well employees are being assisted when they initiate a conversation.

To use the HR chat queue, the administrator must activate the Human Resources Application: HR Connect plugin.

Role required: admin or hr\_admin

You can configure the assignment group for monitoring the chat queue, and the messages that employees see when they initiate a conversation and while they are waiting.

You can review the chat records to see how long employees waited for a response and who is accepting the chat requests.

1. Navigate to **Collaborate > Administration > Queues**.
2. Select **HR Department Chat Queue** from the Chat Queues list.
3. Fill in the fields, as appropriate.

**Table 23: Chat Queue form**

Field	Description
Name	Name of the queue.
Active	Not used in Connect.
Assignment group	User group that contains the support staff for the queue. Any user in the group can view the queue in the Connect sidebar and accept chats. No other users can access the queue. This field must be populated.
Average wait time	Average time it takes for an agent to accept a chat in the queue. This value is automatically calculated and should not be edited manually.
Confirm problem	Not used in Connect.
Escalate to	Different queue to which an agent can escalate a chat. For example, there might be a queue for high priority support chats. When a queue is defined in this field, agents can access the <b>Escalate</b> option in conversations.
Initial agent response	Message that users see when an agent accepts their chat. For example, <b>Thank you for contacting support. We are looking into your question now and will be with you shortly.</b>
Not available	Message that users see when they attempt to start a chat outside the queue's defined <b>Schedule</b> . You can use HTML to format the message and include links or media.
Question	Initial phrase that users see when they start a new chat in the queue. For example, <b>How can I help you?</b>

Field	Description
Schedule	Schedule that defines when the queue is available. Leave the field blank to make the queue available all the time. Users cannot start a new conversation in the queue outside the schedule hours.

4. To review conversations associated with the queue, scroll to the **Chat Queue Entries** related list and review the records for the following information.

Option	Description
<b>How long the user waited and the result</b>	Review information in the <b>Action</b> and <b>Wait time</b> columns. <b>Abandoned</b> in the <b>Action</b> column indicates the chat was completed.
<b>Who is actively helping employees in the queue</b>	Review the names of HR agents in the <b>Assigned to</b> column.
<b>Review a conversation</b>	Click the <b>Created</b> value.

## Human Resources knowledge management

An important benefit of the HR system is the Human Resources knowledge base that can contain policies, benefits, holiday schedules, and so on.

HR knowledge management allows you to create and maintain articles specific to HR and share them across the organization. The Human Resources application provides the Human Resources General Knowledge base specifically for this content. Benefits of using this knowledge base include the following.

- Employees have one source of information that is easy to search.
- Information can be kept up-to-date, as knowledge articles have a defined life cycle: create, review and update, publish, retire.
- Contextual search of the HR knowledge base is performed during HR case entry based on words entered in the short description. A list of the relevant articles displays automatically. If an article answers the employee's question, the employee does not need to submit the case.
- HR agents can attach knowledge articles to HR cases to respond to the employee request.

Organizations may have different HR policies and benefits packages based on location or business unit. For example, holiday schedules and medical benefits may vary by country, or different policies may be in effect for a manufacturing plant than for your corporate offices. You can define multiple HR knowledge bases as needed, and define user criteria to specify which knowledge base users have access to.

It is important to assign a knowledge manager to each HR knowledge base. Users with the `hr_kb_writer` role can create and edit HR knowledge articles. The HR knowledge manager has the following responsibilities.

- Ensure that the HR knowledge base contains all of the HR documentation.
- Devise a way to identify missing content, such as questions from employees that are not answered in knowledge articles, and to add the content.
- Implement a process for HR knowledge article life cycle: author, review, update, publish, retire.
- Schedule regular review of content so it can be updated or retired.

HR knowledge articles are managed through **Human Resources > Knowledge Management** modules.

For more information about how to create, edit, publish, and retire knowledge articles, see [Knowledge Management](#).

## Attach a knowledge article to an HR case

You can add a knowledge article to an HR case to help process that record. For example, you can attach an article about the company dress code policy when an HR case is submitted that asks about wearing shorts to work.

Role required: hr\_agent or hr\_case\_writer

When you open an active HR case record, a list of **Knowledge results** appears below the comments based on keywords in the text. There are two tabs of results based on the user criteria that is associated with the knowledge base.

- **My Results** displays a list of articles you can access.
- **(employee name) Results** displays a list of articles that the **Opened for** employee can access.

You can preview an article, and, if it is relevant, attach it to the case. You can also scroll to the **Attached Knowledge** related list to add or view knowledge articles related to that record.

1. Navigate to **Human Resources > Case Management** and open one of the modules, such as **Assigned to me** or **Open**.
2. Open the HR case.
3. Review the list of suggested knowledge articles, and do any of the following:

Option	Description
<b>Preview the article</b>	Click <b>Preview</b> next to the article. After reviewing the article in the pop-up window, click <b>Attach to HR Case</b> if it is relevant, or click <b>(X)</b> to close the article.
<b>Attach the article without previewing it</b>	Click <b>Attach</b> next to the article.

When you attach an article, its text is copied to **Additional comments**. After you save the case, it appears also in the **Attached Knowledge** related list.

4. To attach a knowledge article in the **Attached Knowledge** related list, complete the following steps.
  - a) In the **Attached Knowledge** related list, click **Edit**.
  - b) Optional: If necessary, change the knowledge base to search within.
  - c) To search for articles based on content in the article, add a condition, for example, **[Short description] [contains] [dress code]**, and click **Run filter**.
  - d) Select the knowledge base number in the **Collection** list and click the right arrow to move it to the **Attached Knowledge List**.  
When you select an article number, its topic and short description appear below the list.
  - e) Click **Save**.

## HR cases

HR cases hold the details of HR requests, such as requests for information, and HR processes, such as onboarding.

Users can submit HR cases through the HR Portal or the HR Catalog in Self-Service.

HR specialists, generalists, and managers can perform any of the following tasks.

- Create HR cases for employees to record the processing of HR requests, such as a request from an employee for a leave of absence.
- Create HR cases for automated HR processes, such as employee onboarding and offboarding.
- View HR case information and manage the overall HR workload. For example, a manager may work with all HR cases that are not assigned.

HR cases can have one or more associated HR tasks to manage individual pieces of work within the case.

Administrators can customize the predefined HR case processes such as inquiries, onboarding, and offboarding. New HR processes can be designed to meet your organization's requirements. For example, you may have a process for maternity and paternity leave requests that you can automate.

Processes may vary depending on the employees they relate to, their teams, locations, positions, and other factors. For example, an onboarding process for a sales employee may differ from the onboarding process for an IT employee, and an employee who travels requires a laptop, but an employee based in the office is given a desktop. After a process is defined, the associated department can set up and maintain the rules and conditions for the process.

### Example HR request

An employee named Alan wants to find out about the company's paternity leave policy. He also wants to discuss flexible working hours around the expected time of the birth of his child.

1. Alan submits an HR request asking about paternity leave policies and requesting a meeting to discuss flexible working hours.
2. An HR case is created and assigned to an HR agent, such as a specialist or generalist, based on assignment rules.
3. The HR agent processes the HR case, creating two HR tasks for this two-part request. Each task is assigned to the user who can process it.
4. When all the tasks are completed, the HR case is closed.

## Self-Service HR portal

From the Self-Service HR Portal, you can get HR benefit and policy information, and request help from the HR team.

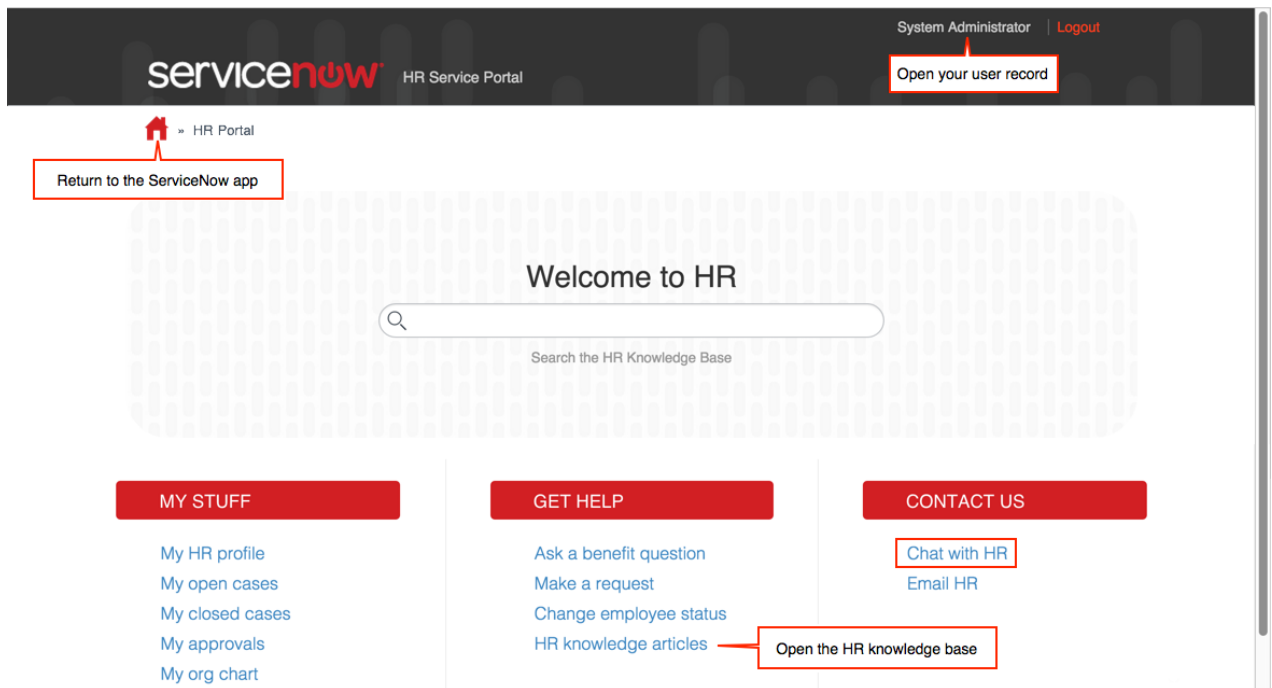


Figure 5: HR Portal



From the HR Portal, you can take the following actions.

- Search for HR knowledge articles that answer your questions. As you type, articles are suggested based on keywords.
- Open your HR profile from the link under **My Stuff**. You can update fields that are not disabled in your HR profile.
- View your HR requests, approvals (if you are an approver), and organization chart.
- Submit HR questions and requests that are not answered in HR knowledge articles.
- Open a chat window with an HR specialist. An administrator must enable the HR chat queue for the link to appear.
- Send an email to HR to create your request.

---

**Note:** The HR Portal page does not work in Microsoft Internet Explorer 8. Use the HR Catalog module to submit an HR case.

---

## Submit a request from the HR Portal

You can open the HR Portal to submit questions and request help from the HR team.

There are three types of HR requests in the **Get Help** list on the HR Portal.

### Ask a benefit question

Use this link when you have a question about your organization's benefits or policies. There are a number of predefined topics, such as 401K or retirement, or you can ask a general question.

### Make a request

Use this link when action is needed, such as changing your HR profile information or requesting a leave of absence.

### Change employee status

Use this link for onboarding new employees or offboarding employees who are leaving the organization. Typically, HR managers request employee status changes. Employees who do not have authority to create employee status change requests see a blank page.

1. Navigate to **Self-Service > HR Portal**.
2. Under **Get Help**, select the type of request to submit.
3. Select the item to request.

The **Short description** is filled out, and a list of related knowledge articles based on keywords in the text appears below the text field where you enter additional information, such as your question.

4. Review the knowledge articles that appear, and if your question or request is resolved, exit the form. Otherwise, continue with the remaining steps.
5. Answer the questions in the request form.  
Questions vary depending on the item selected. Mandatory fields have a red asterisk (\*) beside them.
6. Click **Submit**.

The page refreshes to display your open HR cases. A link to the case appears at the top of the page, and, if the case was automatically assigned, a message tells you who the case was assigned to.

## Request employment verification

You can submit an HR request to generate an employment verification letter and have it sent via email to the institution making the request.

When you enter the request, you enter the contact's name, address, and email address. The letter is generated based on your HR profile information. The HR agent assigned to your request can attach the letter to an email message and send it to the contact email address you provide.

1. Navigate to **Self-Service > HR Portal**.
2. Under **GET HELP**, select **Make a request**.
3. Select **Employment verification**.
4. Enter the name of the institution, the name of your contact and the address, and the contact's email address.
5. Complete the form.
6. Click **Submit**.

## Request tuition reimbursement

If your organization reimburses the tuition you paid for courses that support your role, a tuition reimbursement request form is available from the HR Portal or HR Catalog.

When you submit the request, you must attach required documentation to the case. Typically this is your payment receipt and final grade. You must also enter a justification describing how the course supports your role in the organization.

1. Navigate to **Self-Service > HR Portal**.
2. Under **GET HELP**, select **Make a request**.
3. Select **Tuition**.
4. Enter a short description and the justification for taking the course.
5. Enter the course details and amount of the reimbursement you are requesting.
6. If you have digital copies of your payment receipt and final grade, drag and drop the documents from your file browser into the form.  
The documents appear at the top of the form. You can view them, or click **Manage Attachments** to remove them if necessary.
7. Click **Submit**.  
The case is created with two tasks: one for the HR agent to review the documents, and one for a payroll agent to process the reimbursement. The list of HR requests you opened appears, and messages at the top tell you who the HR request and tasks are assigned to.

If you did not attach the required documents, you can attach them to the HR request when you are ready. Open the HR request, and drag and drop the documents from your file browser, or click the attachment icon to navigate to the document location and select them.

## View your open HR cases

You can view your open HR cases from the HR Portal.

1. Navigate to **Self-Service > HR Portal**.  
You can also navigate to **Self-Service > My Requests**, however, the list that appears contains all of your open requests, not just HR cases.
2. Click **My open cases** under **My Stuff**.

3. Click the case number to see its details.  
Based on keywords in the **Short description** field, a list of knowledge articles may appear below the activity section. Review the articles for a resolution to your question or request.
4. Optional: Enter comments or change the priority if necessary.
5. Optional: To view your manager in a hierarchy, scroll to **Related Links** and click **Show employee org chart**.  
Click the back arrow on the upper left to return to the case.
6. If you made changes, click **Update**.

## Use the HR knowledge base

When you have a question about the organization's policies or benefits, search the HR knowledge base before submitting an HR request.

On the HRSM Portal, you can enter search text and see matching articles as you type. If an article answers your question, you do not need to submit an HR request.

1. Navigate to **Self-Service > HR Portal**
2. In the HR knowledge base search box, enter your search text and do one of the following:

Option	Description
<b>Open an article that appears below the search box</b>	Click the article name.
<b>Open the HR knowledge base advance search</b>	Click <b>Advanced search</b> at the top of the list. You can also click <b>HR knowledge articles</b> under <b>Get Help</b> .

3. To complete the advanced search, enter text above the list of articles and press the Enter key. Matching articles are listed, and a filter appears on the left to let you refine search results by knowledge bases, categories, or authors.
4. To refine the search, check the box for a filter.  
The list refreshes with the narrowed search results.
5. Click the article to read.

When you access knowledge base articles, it is a good practice to rate and review the information presented, especially if information is missing or out-of-date. Your organization may choose not to show rating and comment fields, but if they appear in the article, take the time to rate it. This helps ensure that information stays current and useful to others.

## Chat with HR

You can use the **Chat with HR** link on the HR Portal to ask a question of an HR agent who is monitoring the chat queue. The HR agent can open a case from the conversation if your question needs further investigation.

The HR chat queue is available if the administrator has enabled it. If it is not enabled, the chat link does not appear in the HR Portal.

1. Navigate to **Self-Service > HR Portal**.
2. Click **Chat with HR** under **Contact Us**.  
The HR department chat queue opens in a new window.
3. Enter your question and press the Enter key.

An HR agent who is monitoring the queue will join the conversation. The HR agent can transfer the conversation to another HR agent if necessary, or create an HR case. Either of you can attach files in the chat window, such as policy documents or screen shots.

## Submit a case from the HR catalog

You can submit HR cases from the HR catalog.

1. Navigate to **Self-Service > HR Catalog**.
2. Select the appropriate category and item.
3. Answer the questions in the request form.  
Questions vary depending on the item selected. Mandatory fields have a red asterisk (\*) beside them.
4. Click **Submit**.  
The case is submitted to HR for processing. A link to the case appears at the top of the page, and, if the case was automatically assigned, a message tells you who the case was assigned to.

## Attach documentation to an HR case

You may receive a request from an HR agent to submit documentation, such as receipts or legal documents.

For example, if you are asking for tuition reimbursement, the HR agent needs a copy of the tuition payment receipt to submit the reimbursement request. When documentation is required, a task is generated for you to attach the document(s), and you receive an email notification.

If you have a digital copy of the requested document when you receive the email notification, you can reply to the notification and attach the file to the reply email. The system attaches it to the task and closes the task for you. The following procedure describes how to attach it to the HR case in the system.

1. When you receive notification of required documentation, scan or upload the documents to your computer.
2. Click the link to the task that is in the notification email.  
The HR Task form opens. The **Description** lists the document that is needed.
3. To attach the document, perform one of the following actions.
  - Open your file browser to its location, and drag it to the header of the task.
  - Click the paperclip attachment icon, browse to the file, attach it, and close the attachment window.

The HR task state automatically changes to **Closed Complete**. A notification is sent to the HR agent that the documentation is available.

## Create an HR case

HR agents may create HR cases for employees, for example, if an employee calls them with a question that must be investigated. Typically, employees use Self-Service to create HR cases for themselves by submitting a request through the HR Portal or HR Catalog.

Role required: hr\_agent or hr\_case\_writer

HR agents can create a new HR case using the Create New Case form. The HR agent can select a template to create standard tasks for each type of case.

1. Navigate to **Human Resources > Case Management > Create New Case**.

The HR Case form opens. The workflow stages are listed across the top, and the new case is in the **Assigned** stage.

2. Complete the fields on the left side of the form.

**Table 24: HR case fields**

Field	Description
Number	The auto-assigned case ID number, which cannot be changed.
Opened for	The user who needs HR assistance. Click the lookup icon and select the user. The user's location and department information is filled in automatically if it is known.
Location	The geographical location of the user associated with the case.
Department	The department of the user associated with the case.  If you select the department, the <b>Manager</b> field is populated if there is an assigned department head.
Category	The category of the HR case.  <b>Note:</b> Some of the case categories have an associated workflow.
HR profile	The associated HR profile, if any.  Click <b>Create Profile</b> to automatically generate the HR profile if none exists.
Template	The template is populated when the category is selected.  To choose a different template, click the lookup icon and select one. The <b>Category</b> is updated. If there are associated tasks, they are created when the case is saved.

By selecting the category and template, you can save the new case and initiate the auto-assignment process, if one is available.

3. Enter a short description.

As you enter the short description, a list of knowledge articles matching words you type appears below the field. You can preview the articles to determine whether the caller's question is answered.

4. Right-click the form header and click **Save**.

When the new case is auto-assigned, the workflow stage and **State** fields move to **Assigned**. The **Assignment group** and **Assigned to** fields are populated. You can change these fields if necessary.

Knowledge articles that appeared when you entered the short description are listed below the notes section. There are two tabs; one showing articles that you have access to, and one showing articles that the caller can access. These may be different, for example, if you are located in the U.S. and the caller is located in Mexico and there are different articles for each country's holiday schedule.

5. To preview and attach a knowledge article to the case, complete the following steps.
- Click **Preview** next to an article.  
If you know the article contains the information you need without previewing it, click **Attach** next to the article.  
The article opens in a pop-up window. Click the up or down arrow to review the previous or next article. Click (X) to close the window.
  - To attach the article, click **Attach to HR Case**.

The article content is copied into the **Activity** field. After you update the case, the article appears in the **Attached Knowledge** related list.

6. Complete the form.

**Table 25: HR case fields**

Field	Description
State	The state of the case.
Priority	The precedence of the case, based on the template and whether the employee is a VIP.
Opened	The date and time the case is opened.
Opened by	The user creating the record.
Assignment group	The group the record is assigned to. If the group is not set automatically, assign an HR group to provide a selection of HR users in the <b>Assigned to</b> field. Assignment groups are restricted to those groups with a type of human_resources.
Assigned to	The user assigned to work on this case. If the user is not auto-assigned, click the lookup icon to select a user who is a member of the selected assignment group.
Watch list	The list of users who receive notifications regarding this case. Click the lock icon to add users. Click the add me icon to include yourself.
Skills	The required skills of the person assigned to this category of HR case.
Short description	A brief description of the case. A default value appears if you selected a template.
Description	A longer, more detailed description of the case.
Additional comments or work notes	Additional information about the case. Enter the information and click <b>Additional comments</b> if you want the user to see it. Click <b>Work notes</b> to add it as an internal work note.

7. Optional: Depending on the case category, HR profile fields may appear. Enter any new or changed profile information for the user.
8. Optional: Click an option under **Related Links** to add tasks, employment history, or emergency contacts, or to see the caller's organization chart.
9. Click **Update**.

After the HR case is created, a service level agreement (SLA) is applied to track its progress. SLAs define the duration of time it takes to close an HR case. By default, HR onboarding and offboarding cases are set to two days, and other HR cases are set to four hours. The SLA can be suspended, for example, if the HR agent has to contact a vendor to obtain the information and the vendor is not immediately available.

HR managers and administrators can view case SLA records by navigating to **Human Resources > Case Management > Case SLAs**. You can also run SLA reports.

## View HR case information

Role required: hr\_case\_reader

1. Navigate to **Human Resources > Case Management**, then select one of the following modules.
  - **Assigned to me:** all cases assigned to the logged-in user.
  - **Open:** all open cases.
  - **Open - Unassigned:** all open cases that have not been assigned.
  - **All:** all cases.
  - **Closed:** all closed cases.
2. Select the case to view.

## Checklists in HR cases and tasks

Adding a checklist is a feature of tasks. In an HR case or task, a checklist can serve as a reminder to the HR agent and to ensure that the correct procedure is followed.

A checklist can be added as a reminder for just the current case, or the HR agent can save the checklist for reuse. Do not confuse checklists with HR tasks. Here is an example of how both might be used for a request to change employee HR profile information.

1. A manager submits an employee change request through the HR Portal when the employee gets a promotion. An HR case is created with the request to change the title and position of an employee. This HR case involves changes not only to the HR profile, but also to the records in the payroll and performance management systems.
2. HR tasks are added to the HR case to update the payroll and performance management systems. Each HR task is assigned to an agent on the appropriate HR team, such as a payroll clerk and an HR generalist.
3. The payroll clerk adds a checklist to the HR task as a reminder of how to time the payroll record update for the correct payroll cycle.
4. The HR agent adds a checklist to the HR case as a reminder to announce the promotion within the organization. Example checklist items are:
  - Get the promotion into the next company newsletter.
  - Let the manager know when the change reflects in the system.
  - Remind the employee to order new business cards, when applicable.

## Enable and reuse checklists

The checklist does not appear automatically in the HR case and HR task forms. If you decide to use the checklist feature, the administrator must configure the forms in the form designer to add the checklist formatter. Refer to [Form designForm designForm design](#).

If you plan to reuse checklists for certain types of tasks, determine a naming convention that makes it easy to find the checklist. All checklists are saved in the same list and are available for selection in every type of task. For example, you may construct checklist names to begin with **HR** and then specify if it is for a case or task, and its purpose. Examples based on the scenario include:

- HR case promotion reminders
- HR task payroll timing

Refer to [Create a new checklistCreate a new checklist](#).

## HR cases for VIPs

Your organization can assign VIP status to users, such as the CEO and vice-presidents, to ensure that the resolution of their tasks is given high priority.

If your organization uses the VIP feature, set up the following to ensure that VIP HR cases are handled appropriately.

- Add HR managers to the group **HR VIP Watchlist**. When an HR case is submitted, members of this group receive notification as the case progresses.
- Review the HR service level agreement (SLA) for handling VIP cases; the duration is two hours. When the duration is reached, the SLA is breached and the members of the watchlist are notified.
- Set the default priority to assign to HR cases for VIPs in the Human Resources configuration options.

VIP status is assigned to users in the user profile. Organizations using VIP status can customize the user form in the Form Designer to show the VIP check box.

You can identify VIP HR cases in the following ways:

- **HR Cases** list: A VIP icon appears in the **Opened for** field. You may have to personalize the list to see the **Opened for** field.
- **HR Case** form: The employee name in the **Opened for** field is red.
- HR catalog items: When the form is submitted, a message appears at the top identifying the submitter as a VIP.

## Approve an HR case

HR cases may require review and approval before the HR case process can proceed.

Role required: hr\_admin, hr\_approver\_user, hr\_agent, or hr\_manager

Approvals can be assigned to individual users or to members of a specified group. For example, all members of the HR group are approvers for the predefined HR processes, such as onboarding and offboarding.

Only one member of the group must respond and approve or reject the request for it to proceed.

---

**Note:** Employee onboarding and offboarding HR cases always require approval.

---



After a new case is submitted, a group approval task is created and approvers are assigned. An email notification is sent to all approvers. They appear in the **Approvers** related list in the HR case.

1. Open the HR case by performing one of the following actions.
  - Click the link provided in the email.
  - Navigate to **Human Resources > My Approvals**, and then select the record.
  - Navigate to **Self-Service > HR Portal** and click **My approvals** under **My Stuff**.
2. Review the HR case and click **Approve** or **Reject**.
  - If the request is approved, the process continues and the HR case state moves to **Work in Progress**. Related items are auto-created, such as HR tasks and requests as defined in the template or workflow.
  - If the request is rejected, the process terminates, the HR case state moves to **Closed Incomplete**.
  - After one approver responds, the approval state for other approvers changes to **No Longer Required**.

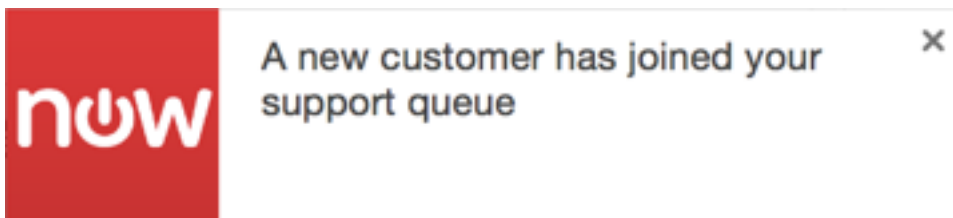
## Monitor the HR chat queue

Employees can ask a question from the **Chat with HR** link on the HR Portal. Their question is placed in the HR chat queue, and any HR agent monitoring the queue can respond to it.


To use the HR chat queue, the administrator must activate the Human Resources Application: HR Connect plugin.

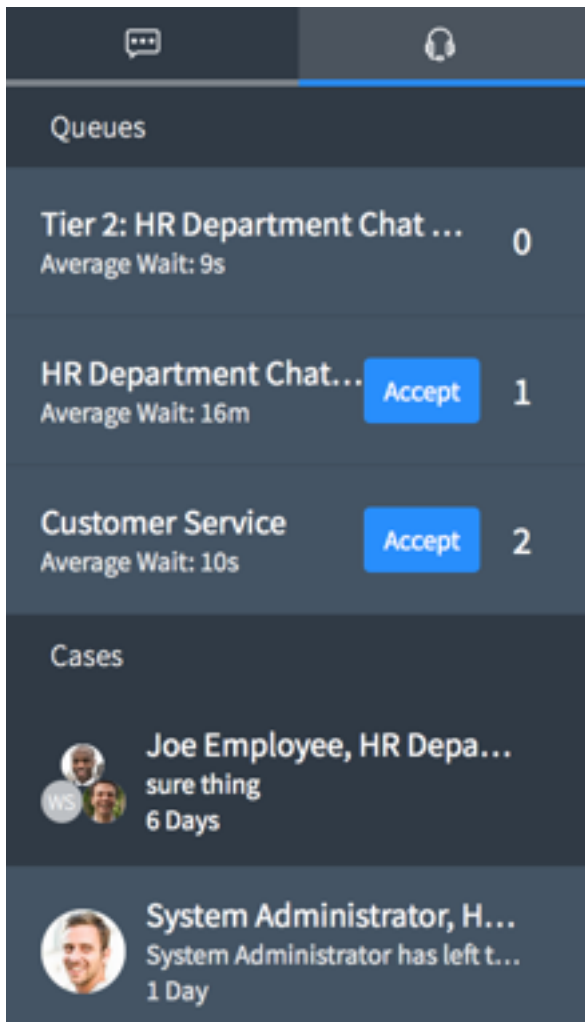
Role required: hr\_agent

By default, all members of the HR group monitor the HR chat queue. When a question is submitted to the queue, a pop-up notification appears.



**Figure 6: HR chat queue notification**

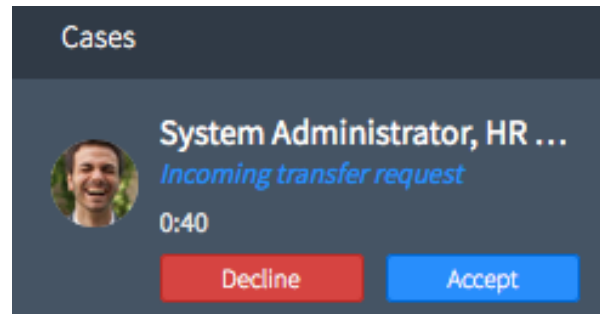
1. Navigate to **Collaborate > Connect Support**.  
The Connect workspace opens in a new tab.
2. Click the support tab of the Connect sidebar, indicated by a headset icon ().  
The support tab displays **Queues** to which you belong. It also displays your open support conversations under **Cases**. When a user starts a support conversation or an agent transfers a conversation to a queue, any agent who belongs to the associated queue has the option to accept the conversation. An agent can also request to *transfer a conversation* directly to you.



3. Accept a conversation in one of the following ways.

Option	Description
<b>Accept a conversation from a queue</b>	Under <b>Queues</b> , click <b>Accept</b> by the queue.  The conversation opens in the conversation pane and an entry appears in the <b>Cases</b> section of the sidebar.

Option	Description
<b>Accept a transfer request</b>	Under <b>Cases</b> , click <b>Accept</b> by a transfer request.



The conversation opens in the conversation pane. The agent who transferred the conversation may or may not stay in the conversation.

---

#### 4. Respond to the user and help resolve the issue.

By default, your messages are added to the conversation record as comments and are visible to the user.

If necessary, you can open a new HR case or incident from the conversation for further investigation. You can also transfer the conversation to a different agent or queue, or escalate the conversation to a higher priority queue.

For more information, see [Connect Support](#)

## Work on an HR case

You work on an HR case to answer the question or resolve the issue. You can use the HR Case Dashboard to review the priority and work on your assigned cases.

Role required: hr\_agent or hr\_case\_writer

The HR Case Dashboard shows you, at a glance, how many cases are assigned to you, how many cases are high priority, and the number of breached cases. Your assigned HR cases display in a list.

There are several ways that an HR case may be resolved.

- Enter an answer in the **Additional comments** field.
- Attach knowledge articles that describe the benefit or policy in question.
- Add request items if applicable. For example, a case to change an employee's department and position may require a task to obtain software needed in the new role.
- Add tasks and assign them to the fulfillment group.

---

**Note:** The state changes described below are for the default HR configuration. Your organization may have configured the workflow. If so, you may experience differences in the process flow.

---

#### 1. Navigate to **Self-Service > HR Case Dashboard**.

You can also navigate to **Case Management > Assigned to me**.

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**Note:** If the name in the **Opened for** field is in red, this case is for a VIP user and must be prioritized ahead of other cases. The service level agreement (SLA) is set to a shorter duration.

---

2. Open an HR case to work on, starting with high-priority or breached SLA cases.  
Based on the short description, the system looks for similar cases that may help you resolve this HR case. As you look at the HR case details, review the **Similar Cases** related list.
3. If the state is **Draft** or **Assigned**, click **Start work** in the form header.  
The state changes to **Work in Progress**.
4. Perform any of the following actions.

Option	Description
<b>Update employee HR profile information</b>	<p>Enter information in any of the following sections or related lists:</p> <ul style="list-style-type: none"> <li>• <b>Employment Information</b></li> <li>• <b>About Employee</b></li> <li>• <b>Contact Information</b></li> <li>• <b>Emergency Contacts</b></li> <li>• <b>Employment History</b></li> </ul> <p style="text-align: right;"><b>Note:</b> Depending on the case category, you may not see all of these sections and related lists.</p>
<b>Attach a knowledge article</b>	Follow the steps in <a href="#">Attach a knowledge article to an HR case</a> on page 86.
<b>Order request items</b>	Click <b>New</b> in the <b>Requested Items</b> related list. Complete the form and click <b>Submit</b> .
<b>Add tasks</b>	<p>Click <b>Add Task</b> under <b>Related Links</b>. Complete the form and click <b>Submit</b>.</p> <p>You can click <b>Start Work</b> if the task is assigned to you and you are ready to work on it.</p>

5. Optional: To view the manager of the user in the **Opened for** field, scroll to **Related Links** and click **Show employee org chart**.  
When you're finished viewing the org chart, click the back arrow on the upper left.
6. Optional: If you determine that the case can be cancelled, enter the reason in the **Work notes** field and click **Cancel** at the top of the form.
7. Optional: To add a checklist, click the arrow beside **Checklist** and select the checklist to add. To create a new checklist, perform the following steps.  
**Checklist** appears if the administrator configured the form to display it.
  - a) Click the arrow beside **Checklist** and select **Create new**.
  - b) Enter the first item in the text box that appears and press the enter key.
  - c) Enter subsequent items as needed to complete the checklist.
  - d) Optional: To save the checklist for reuse, click the arrow beside **Checklist** and select **Save as Template**. Enter the name and click **Save**.

You can click the minus icon to the right of a checklist item to delete it. You can click and drag a checklist item to another position in the list.

8. When you're finished, perform one of the following actions.

Option	Description
<b>Close the case</b>	Enter resolution information and click <b>Comment</b> for the caller to see the note or <b>Work Note</b> for internal information. Click <b>Close Complete</b> at the top of the form.  <b>Note:</b> All HR tasks must be closed before the parent HR case can be closed.
<b>Save the case to continue working on it</b>	Enter work notes describing your progress and click <b>Update</b> .

If you closed the case, the caller is notified to review it and accept or reject the resolution or reopen the case. When it is accepted, the state changes to **Closed - Complete**. If there is no response within two business days, the case closes automatically.

If the resolution is rejected, the case is reopened to the **Work in Progress** state.

## View and update an HR task

You can work on the HR tasks assigned to HR cases.

Role required: hr\_agent or hr\_task\_writer

You can view HR tasks from the parent HR case by scrolling to the **Tasks** related list. To work with HR tasks directly, follow these steps.

1. Navigate to **Human Resources > HR Tasks**, and select a module, such as **Open** or **Assigned to me**.
2. Click the task to view.
3. Perform any of the following actions.

Option	Description
<b>Begin working on a new task</b>	Click <b>Start work</b> .  <b>Note:</b> The parent HR case must be in progress for you to start work on the task.
<b>Close a task</b>	Enter information in the <b>Work notes</b> field and other fields as needed, and change the <b>State</b> to <b>Closed Complete</b> .  <b>Note:</b> All HR tasks must be closed before the parent HR case can be closed.
<b>Clone the task to create a new task</b>	Click the <b>Clone Task</b> related link. Enter the new task information in the task form and click <b>Update</b> .
<b>Cancel the task</b>	Click <b>Cancel Task</b> in the form header.
<b>Review the progress of sibling tasks</b>	Scroll to the <b>Sibling Tasks</b> related list. If sibling tasks are listed, click a task number to see the details.

When all tasks are closed for an HR case, an email notification is sent to the HR agent who is assigned to the case.

4. Optional: To suspend the parent HR case service level agreement (SLA) because you need more information, look for one of the following options under **Related Links**. If one appears, select it and enter a description of the information you need.
  - **Request document**: suspend a task because a document is needed
  - **Request additional user information**: suspend a task because more information is needed
  - **Suspend case**: suspend a task for any other reason

If no choices appear and you need to suspend the case, open the parent HR case and suspend it.

The HR case is suspended. The employee receives an email notification and responds by providing the information. You are notified when this action is completed.

5. Optional: To add a checklist, click the arrow beside **Checklist** and select the checklist to add. To create a new checklist, perform the following steps.

**Checklist** appears if the administrator configured the form to display it.

- a) Click the arrow beside **Checklist** and select **Create new**.
- b) Enter the first item in the text box that appears and press the enter key.
- c) Enter subsequent items as needed to complete the checklist.
- d) Optional: To save the checklist for reuse, click the arrow beside **Checklist** and select **Save as Template**. Enter the name and click **Save**.

You can click the minus icon to the right of a checklist item to delete it. You can click and drag a checklist item to another position in the list.

6. Click **Update**.

## Suspend and resume an HR case

You can suspend an HR case if you are unable to close the case within the duration specified in the service level agreement (SLA).

Role required: hr\_agent or hr\_case\_writer

For example, you may need to contact a vendor, such as the insurance administrator or payroll processing company, to obtain the information needed to close the case. After beginning work on the case, you can suspend it until the information is received. This way the HR case does not show that the SLA is breached. When the information is received, you enter it into the case and resume SLA tracking.

1. Navigate to **Human Resources > Case Management > Assigned to me**.
2. Open the HR case to suspend.  
You must begin work on the case before you can suspend it.
3. Click **Suspend**.  
The **Suspend Reason** pop-up window opens.
4. Select one of the following suspension reasons and enter the information you are waiting for.
  - **User**: If you need more information from the employee before proceeding.
  - **Company**: If you are waiting for a reply from a vendor or other outside company.
  - **Document**: If the employee needs to attach documentation to the HR case.
  - **Group**: If you are waiting for a reply from an internal group.
  - **Other**: If you suspend the case for any other reason.

For example, if you are waiting for the health insurance administrator to investigate an employee claim, select **Company** for the reason and enter "Results of investigation" or something similar.

**5. Click **Suspend**.**

The SLA stops progressing and the suspension notes appear in the activity stream as work notes. You can continue to add work notes to a suspended case.

**6. To resume a suspended HR case, open the case and click **Resume**.**

The SLA progress is resumed.

## Approve an employee change request

You may receive a notification to approve a request to change employee HR profile information. Approving the request updates the HR profile and automatically closes the case.

Role required: hr\_agent or hr\_approver\_user

An employee can change certain personal information in his or her own HR profile. The employee must submit an employee information change request to have other information updated. The employee's manager can submit a request to change the HR profile information of a direct report, such as when the direct report is promoted to a new position.

When the employee information change request is submitted, an HR case is opened, the Employee Change HR Workflow evaluates whether the request needs to be approved, and one of the following happens.

- If no approval is needed, the HR profile is updated automatically and the HR case is closed.
- If it does need approval, HR group members receive a notification with the approval request. When the request is approved, the HR profile is updated and the HR case is closed automatically.

**1. To approve the request, begin by opening the HR case in one of the following ways.**

- Click a link in the email notification to approve, reject, or view the case.
- Navigate to **Human Resources > Case Management > Assigned to me** and select the case.

**2. If you opened the HR case from the email link or the menu, review the proposed changes.**

**3. In the **Approvers** related list, set your approval record to **Approved**.**

The HR profile is updated and the HR case is set to **Closed Complete**.

If the HR case is rejected, the HR profile is updated with a reject message and the HR case is set to **Closed Incomplete**.

## Request user documentation

You can request that an employee attach required documentation to an HR case.

Role required: hr\_agent or hr\_case\_writer

To request documentation, you suspend the case with a **Document** suspend reason. The case SLA is stopped and a task is created and assigned to the **Opened for** employee. Examples of required documentation include the following.

- Receipts for tuition reimbursement
- Affidavits of domestic partnership to extend benefits
- Work visas

**1. Open an HR case that requires documentation.**

**2. Click **Suspend**.**

The Suspend Reason pop-up window opens.

3. Select **Document** from the **Reason** choice list.

4. Enter a **Work Note** describing the document that is required to resolve the case.

The employee sees this description in the email notification they receive.

5. Click **Suspend**.

The case is suspended and a task is assigned to the user who must submit the documents. An email notification with a link to the task is sent to the employee.

The employee clicks the link in the email to open the task. When the documentation is attached, it is automatically set to **Closed Complete**. The attached documentation is moved to the HR case, and you receive notification that the HR case is resumed and the task is closed.

You can click the link in the email notification to open the HR case. Review the attachments, and then complete and close the HR case.

## Complete an employment verification request

You can generate an employment verification letter when an employee requests one. The letter is generated from a button in the HR case form.

Role required: hr\_agent or hr\_case\_writer

The employment verification letter is generated as a PDF. You can print and mail the letter, or attach it to an email from the HR case.

1. Open an employment verification request and click **Start Work** if necessary.

2. Review the contact information provided by the employee.

3. Optional: If you need further information, complete the following steps.

- a) Click **Suspend**.

- b) Select **User** as the reason and enter the information you require in **Work Note** field.

The employee receives an email notification with your comment about the missing information. After the employee adds the information, you receive an email notification that the information was added in a comment.

- c) Reopen the employment verification request and click **Resume**.

4. To generate the letter as a PDF, click **Generate letter**.

The letter is generated as a PDF and added to the case as an attachment. You can manage it as you would any attachment. The case is set to the **Awaiting Acceptance** state and the employee who requested the letter is sent notification to review and close the request.

5. To send the letter, complete one of the following actions.

Option	Description
<b>Send as an email attachment</b>	Click <b>Send Email</b> . Confirm that the <b>Requestor email</b> is correct and click <b>OK</b> .
<b>Mail the letter</b>	View the letter and use the browser PDF tools to print it.

## Approve a tuition reimbursement request

To approving a tuition reimbursement request, you review the documentation and justification that the employee submitted to ensure that the course supports the employee's job functions.

Role required: hr\_agent or hr\_approver\_user



The employee who submits the request attaches the payment receipt and grades to the Tuition form. When the request is submitted, two HR tasks are generated: one to review and approve the payment, and one for payroll to process the payment.

1. Open a tuition reimbursement request and click **Start work**.
2. Verify the documents that are attached and review them to determine whether to approve the request.
3. Optional: If one or more of the documents are not attached or are incorrect, click **Suspend**, select **Document** for the reason, and enter a note about the documents that you need.  
The HR case is suspended. The employee receives an email notification and responds by attaching the documents. You are notified when this action is completed.
4. Open the first task. and click **Start Work**.
5. Complete one of the following actions.

Option	Description
<b>Request is approved</b>	Click <b>Close complete</b> , enter a note that the documents and reimbursement are approved, and click <b>OK</b> .
<b>Request is not approved</b>	Click <b>Close incomplete</b> , enter a note about why you do not approve the documents or justification, and click <b>OK</b> .

6. To notify payroll that this request is approved for payment, open task assigned to HR payroll and enter a comment that the task is ready for work.  
This sends an email notification with the comment to the assigned payroll agent.

After the payroll agent processes the payment, they notify you that the case can be closed.

## Process a tuition payment

After a tuition reimbursement request has been reviewed and approved, you are notified that the task to process the reimbursement payment is ready to work on.

Role required: hr\_agent or hr\_task\_writer

When the tuition reimbursement request was submitted, an HR task was created to process the payment. The HR agent who reviews the documents enters a comment in the HR task for payroll, and you receive email notification with a link to the task.

1. Click the link in the email notification to open the HR task.  
You can also navigate to **Human Resources > HR Tasks > Assigned to me**.
2. Click **Start work**.
3. Complete the process in the payroll system to reimburse the employee.
4. In the HR task, click **Close Complete**, enter a note regarding the reimbursement, and click **OK**.

When this task is closed, an email notification is sent to the HR agent assigned to the tuition reimbursement case. The HR agent can review the information and close the HR case.

## Escalate an HR case

You can escalate an HR task if you are unable to resolve the issue. This action reassigns it to the manager of the HR group.

Role required: hr\_agent or hr\_case\_writer

An HR case may need to be escalated when you encounter any of the following conditions.

- Are unable to complete the task due to excessive workload.
- Do not have the necessary skills.
- Need help with some part of the HR case.

An escalated HR case is reassigned to the manager of the HR group assigned to the case. The manager can resolve the case or reassign it to someone with the necessary skills or available time.

---

**Note:** The manager must be a member of the assigned group. If the manager is not a member of the group, then an error message appears when the escalation is submitted and no action is taken.

---

1. Open an HR case to be escalated.
2. Under **Related Links**, click **Escalate case**.
3. Enter a reason for the escalation in the dialog window that opens.
4. Click **OK**.

The case is reassigned to the manager. An email notification is sent that contains the escalation reason so the manager can determine how to proceed.

## Human Resources management

You can use the Human Resources dashboards, reports, and other HR management modules to monitor and manage HR cases and employee satisfaction.

Depending on your HR job function, you can use any of the following tools to help you with day-to-day HR operations.

- Dashboards, including the Overview, Manager Dashboard, and Onboarding Dashboard. Dashboards are a type of homepage containing gauges and reports. You click a listed record or a segment in a chart to see details.
- HR reports, including those that are available on the dashboards. A number of HR reports are predefined for you, and you can create additional reports.
- Survey response charts and detail for the HR case satisfaction survey or other HR surveys that you create.

### HR Performance Analytics

You can subscribe to Human Resources Performance Analytics to provide additional metrics for evaluation and planning purposes.

## Manage HR cases by category

You can use the Human Resources Overview dashboard to monitor and manage HR cases by category.

Role required: hr\_agent

By default, the Overview dashboard displays the following gauges and reports.

- **HR Cases Opened in the Last 6 Months By Category:** Evaluate the types of cases that are handled over time and ensure there is enough skilled HR staff to manage the case load.
- **Active HR Cases by Category:** See a pie chart of all open HR cases by category.
- **Active HR Case Breakdown by Category:** Review the numbers of HR cases assigned to each HR agent by category so workload can be adjusted if necessary.

- **Active HR Cases Pivot Table by Category:** Use another type of report to see HR agent by category.

You can customize any dashboard that you can access to add or remove gauges and reports. For example, an HR benefits administrator may add a report to the Overview dashboard that displays the status of HR cases in the **Benefits** category.

1. Navigate to **Human Resources > Overview**.
2. Perform any of the following actions.

Option	Description
<b>See the information represented by a chart segment</b>	Hold your cursor over the segment to see a tooltip with the details.
<b>See the corresponding cases for a chart segment</b>	Click the chart segment. A list of the cases opens.
<b>Save the chart as an image file</b>	If a menu icon appears when you point your cursor to a chart, you can click the icon to export the chart to an image file.

## Use the HR Manager Dashboard

You can use the Manager Dashboard to monitor HR team effectiveness based on metrics such as state of assigned cases by HR agent and service level agreement (SLA) elapsed time percentage.

Role required: hr\_manager

By default, the Manager Dashboard displays gauges and reports for the following information.

- **Case Satisfaction Survey - 30 Day AVG:** Evaluate the satisfaction of employees with the handling of HR cases. This chart displays information if you ask employees to complete the HR Request Satisfaction Survey.
- **HR Case SLAs by Elapsed Time Percentage:** Monitor the time to resolve HR cases and follow up when case SLAs are breached.
- **Active HR Cases by Assignment And State:** Review the numbers of HR cases assigned to each HR agent by state, for example, **Ready** or **Work in Progress**, to help you evaluate the effectiveness of each HR agent.
- **HR Case Transfer Rate:** Review the number of cases transferred to a different HR agent by case category to determine whether the right assignments are taking place.

You can customize any dashboard that you can access to add or remove gauges and reports. For example, an HR benefits administrator may add a report to the Manager Dashboard that displays the assignment and state of HR cases in the **Benefits** category.

1. Navigate to **Human Resources > Manager Dashboard**.
2. Perform any of the following actions.

Option	Description
<b>See the information represented by a chart segment</b>	Hold your cursor over the segment to see a tooltip with the details.
<b>See the corresponding cases for a chart segment</b>	Click the chart segment. A list of the cases opens.
<b>Save the chart as an image file</b>	If a menu icon appears when you point your cursor to a chart, you can click the icon to export the chart to an image file.

## Monitor HR onboarding cases

You can use the Onboarding Dashboard to monitor the progress and status of employee onboarding cases. It helps you ensure that onboarding requests are being approved in a timely manner, and that tasks and fulfillment requests are completed before the new employee starts work.

Role required: hr\_manager

You can also use the Onboarding Dashboard to balance the workload of HR agents and recruiters who work on the tasks associated with onboarding. By default, the dashboard displays the following gauges and reports.

- **Active HR Onboarding Cases:** View a snapshot of each case and its workflow stage and state, and see who it is assigned to.
- **Open Onboarding Cases / Requests Awaiting Approval / Number of HR Profiles:** Click any of these quick links to see the corresponding records.
- **HR Onboarding Cases by Location:** Review the number of onboarding cases by state for each location.
- **Active HR Onboarding Cases by Assigned To:** Evaluate the workload of onboarding cases assigned to each HR agent.
- **Active HR Onboarding Tasks by Assigned To:** Evaluate the workload of onboarding tasks assigned to each HR agent.
- **Active HR Onboarding IT Requests:** Review a list of IT fulfillment requests by state. An example is the request to set up and deliver a computer to the new employee.

You can customize any dashboard that you can access to add or remove gauges and reports. For example, an HR recruiting manager may add a report to the Onboarding Dashboard that lists the requests waiting approval grouped by location.

1. Navigate to **Human Resources > Onboarding Dashboard**.
2. Perform any of the following tasks.

Option	Description
<b>See workflow task descriptions in the list of onboarding cases</b>	Point your cursor to a workflow icon to see a tooltip with the description. You can also click the arrow to the left of the icons to expand the list of icons and their descriptions.
<b>Work on an HR case</b>	Click the case number. After you make changes and click <b>Update</b> , the Onboarding Dashboard reopens.
<b>See the cases for a chart segment</b>	Click the chart segment. A list of the cases opens.
<b>Review the cases or tasks assigned to an HR agent</b>	Click the HR agent's name in the <b>Active HR Onboarding Cases by Assigned To</b> or <b>Active HR Onboarding Tasks by Assigned To</b> list.
<b>See the status of IT fulfillment requests</b>	Click the request state in the <b>Active HR Onboarding IT Requests</b> list. Select a request, and view the items in the <b>Requested Items</b> related list.
<b>Save the chart as an image file</b>	If a menu icon appears when you point your cursor to a chart, you can click the icon to export the chart to an image file.

## Run HR reports

You can run reports to view and monitor the current status of HR cases.

Role required: hr\_manager or hr\_admin

Use HR reports to improve overall efficiency and effectiveness. For example, you can view all Employee Relations cases that were created in the past month.

### 1. Navigate to **Human Resources > Reports**.

Reports in the HR report group are listed. The icon to the left of the report indicates the type of report, such as a list, pie chart, or bar chart. Point your cursor to the icon to see a pop-up window of report information. Click the star on the left to make the report a favorite; you can filter for favorite reports by clicking the star above the Reports list.

### 2. Click the name of the report to run.

The report opens with the runtime options at the top and the results below.

### 3. Perform any of the following actions.

- Change any runtime option and click **Run** to see the results.
- In a list report, click a listed case to see its details.
- In a chart, click a segment to see the corresponding cases.
- Publish or schedule the report.
- Edit the runtime options and save a new report.

If you want to create additional HR reports, click **Create a report** above the Reports list. After you create reports, share them with the HR report group so they can be viewed by the group on the Reports list.

### [Reporting](#)

## Available HR reports

Predefined HR reports are available in the **Human Resources > Reports** list.

**Table 26: Available reports**

Report name	Description	Displays
Active HR Cases	Tabular view of all active cases.	Number, Type, Category, State, Short description, Opened by, Assignment group, Assigned to
Active HR Cases Pivot Table by Category	Pivot table view of all active cases.	Assigned to, Category
Active HR Onboarding Cases by Assigned To	Tabular view of active onboarding cases, grouped by Assigned to.	Number, Priority, State, Short description, Opened by, Opened for, Assignment group, Assigned to
Active HR Onboarding IT Requests	Tabular view of onboarding tasks assigned to IT, for example, for computers and other office equipment.	Number, Priority, State, Short description, Assigned to, Location

Report name	Description	Displays
Active HR Onboarding Tasks by Assigned To	Tabular view of open HR tasks for active onboarding HR cases, grouped by Assigned to.	Number, Case, Priority, State, Short description, Assignment group, Assigned to
Case Satisfaction Survey - 30 Days AVG	Bar chart showing the averages over 30 days of responses to the HR case satisfaction survey.	Average Actual Value, Metric
HR Case SLAs by Assigned	Bar chart showing the number of overdue cases by the assigned user.	Count, User, State
HR Case SLAs by Elapsed Time Percentage	Bar chart showing the number of cases by the elapsed time percentage until the SLA is breached.	Count, Elapsed time percentage
HR Case Transfer Rate	Bar chart showing the number of times the assigned HR agent was changed by category for the last six months.	Number of reassignments, Category
HR Cases Opened Last Month by Category	Bar chart of cases raised over the last month by HR case category.	Category, Count, Month
HR Cases Opened This Month by Category	Bar chart of cases raised over the current month by HR case category.	Category, Count
HR Onboarding by Location	Bar chart showing the number of onboarding cases by location.	Location, Count
My HR Cases by Category	Pie chart of cases assigned to you, where each slice represents an HR case category.	Category, Count
Number of HR Profiles	Count of HR profile records.	Number
Open High Priority Cases	Count of active high priority HR cases	Number
Open Onboarding cases	Count of active onboarding cases	Number
Requests Awaiting Approval	Count of unapproved HR requests, or cases	Number
SLA Breached	Count of HR cases with a breached SLA	Number
Unassigned HR Cases	List of HR cases not assigned to any user.	Number, Type, Category, State, Short description, Opened by, Assignment group, Assigned to

## HR case SLAs

HR service level agreements, or SLAs, let you track the progress of HR cases. SLAs are used to ensure that an HR case or task is resolved within a certain amount of time.

An SLA is a record that defines a set amount of time for a task to reach a certain condition. For example, a benefits inquiry should be resolved within a few business days, and an onboarding case should be resolved within two weeks. If the case or task does not reach the condition by the set amount of time, it is marked **Breached**.

SLAs are defined in **Service Level Management > SLA > SLA Definitions**. The following HR SLAs are predefined.

**Table 27: HR SLAs**

SLA	Assigned to
HR Case SLA - 4hours	HR cases in the <b>Case Management</b> category that are not entered for a VIP.
HR VIP Case SLA - 2Hours	HR cases entered for a VIP.
HR Change SLA - 2days	HR cases in the <b>Employee Change</b> category that are not entered for a VIP. For example, onboarding and offboarding cases are assigned this SLA.

One of these SLAs is automatically assigned to each opened case. An administrator can modify these SLAs or create new SLAs for HR cases.

Whenever a case is entered, an SLA record is created to track the case duration. You can view the SLA progress and status for cases in any of the following modules for the Human Resources application.

**Table 28: Modules to view HR SLAs**

HR Module	Description
<b>Manager Dashboard</b>	Displays the <b>HR Case SLAs by Elapsed Time Percentage</b> gauge, which shows the aging of active HR case SLAs.
<b>Performance Analytics</b>	Displays the <b>Active HR Cases SLA Indicator per Week- By AVG</b> chart, which shows the average number of cases that were in each aging bucket, from the past four weeks.
<b>Case Management &gt; Case SLAs</b>	Displays a list of all HR cases with their SLAs.
<b>Reports</b>	Lists the <b>HR Case SLAs by Assigned</b> and <b>HR Case SLAs by Elapsed time percentage</b> HR reports, which you can run to view SLA information.

The SLA elapsed time is recalculated via scheduled jobs on the Schedule Item [sys\_trigger] table. The scheduled job runs based on when the SLA is breached.

Table 29: SLA scheduled jobs

Name	Description
SLA update (already breached)	Repeats every day.
SLA update (breach after 30 days)	Repeats every 5 days.
SLA update (breach within 1 day)	Repeats every hour.
SLA update (breach within 1 hour)	Repeats every 10 minutes.
SLA update (breach within 10 min)	Repeats every 1 minute.
SLA update (breach within 30 days)	Repeats every day.

## View the SLA of an HR case

You can view the SLA record that is created when an HR case is open.

Role required: hr\_admin or hr\_manager

1. Navigate to **Human Resources > Case Management > Case SLAs**.

You can click the HR case number in the **Task** column to open the case, or click the **SLA definition** value to view the SLA conditions.

2. To open the SLA record for a case, click the value in the **Stage** column.



Task SLA  
Created 2015-08-19 09:36:25

Update Refresh Repair Delete

SLA definition:  🔍 ℹ️

Task:  🔍 ℹ️

Updated:  📅

Stage:  ⌵

Has breached:

Schedule ?  🔍 ℹ️

Timezone ?  ⌵

### Timings

Start time:  📅

Stop time:  📅

Actual elapsed time: Days

Hours

Actual elapsed percentage:

Actual time left: Days

Hours

Breach time:  📅

Business elapsed time: Days

Hours

Business elapsed percentage:

Business time left: Days

Hours

Update Refresh Repair Delete

**Related Links**

[Show SLA Timeline](#)

[Show Workflow](#)

The record includes the actual and business elapsed times and the time left before the SLA is breached. The business elapsed times and time left take the schedule into account. In the record example displayed in the figure above, the SLA started at 4:30 PM and the time was paused from 5:00 PM to 8:00 AM.

3. When you are viewing the SLA record, you can perform any of the following actions.
  - To update the SLA percentage and elapsed time values, click **Refresh**.
  - To recreate and recalculate the SLA record, click **Repair**.
  - To view the SLA in a graph, click the **Show SLA Timeline** related link.

## View HR Performance Analytics

HR Performance Analytics helps you align resources and systems to strategic objectives.

Before HR performance analytics data can be viewed, your organization must purchase a subscription to Performance Analytics Premium and the plugin must be activated by an administrator.

Role required: hr\_agent

After HR Performance Analytics is activated, the collection job runs daily. Collected data is kept for 30 days. The data in performance analytics reports is collected based on a daily scheduled job, therefore, the date is one day in the past. Over time, more data is available for historical trending.

The **Performance Analytics** dashboard displays the following reports.

### Volume of Open/Closed Cases by Category

The line chart displays the trend of open and closed cases for each of the last four weeks. Click a point on a line to see open or closed cases for the duration. The **Breakdowns** tab displays the number of open or closed cases by category. Select **Stacked bar** from the choice list for the best data format.

### Active HR Cases per Week - by AVG

The bar chart displays the average number of active cases by state for each of the last four weeks. It also displays the total number of cases for each week. The **Breakdowns** tab displays the aging buckets and the total number of cases in each bucket.

### Active HR Cases by State

The trending chart displays a trend of the cases that moved to each HR case state during the past 30 days. The gray bar to the left of the Trend column represents the proportion of moved cases to the total number of cases. The **Breakdowns** tab displays aging buckets and the number of cases in each bucket for that date.

### Active HR Cases Managed by Agent - Weekly AVG

The trending chart displays the number of cases that each agent was assigned to over the past four weeks.

### Active HR Cases SLA Indicator per Week- By AVG

The bar chart displays the average number of cases that were in each aging bucket for each of the last four weeks. The **Breakdown** tab displays the agent and the number of cases on that date in

the selected aging bucket. Select **Column** from the choice list for the best data format.

1. Navigate to **Human Resources > Performance Analytics**
2. Perform any of the following actions.
  - Point your cursor to an element, such as a bar or pie segment, to see what the element represents.
  - Click a segment to see more details about the element. You may need to scroll up to view the information. The detail contains the following tabs, depending on the selected element.
    - **Chart:** The detail of the element displayed in a chart. You can use the controls on the upper right to add or change comments, targets, and thresholds.
    - **Breakdowns:** The breakdown of the buckets used in the report. Select a chart type from the choice list on the upper right to see the data in another format.
    - **Records:** The records that comprise the element you selected. You can view the detail of each record.
    - **Scores:** The number of records for each week in the report.
    - **Comments:** Comments entered for this report. The tab is disabled unless comments exist.
    - **More info:** A description of the logic that generates the report, how often the job runs, and when the data was last collected.
  - If a menu icon appears when you point your cursor to a chart, you can click the icon to export the chart to an image file.

For more information about performance analytics and how to develop and modify widgets for your organization, see Performance Analytics.

## Evaluate HR survey responses

After you have collected responses to an HR survey, you can review the survey responses and scorecard.

Role required: admin, hr\_manager, or hr\_admin

A scorecard displays charts for survey results, in which category and question responses are analyzed and current ratings are compared with previous ratings. Users can examine ratings over time, compare question ratings, or compare the ratings of all categories. All ratings are averages for the time range selected. The system dynamically updates a scorecard each time you view it, so the ratings reflect recently completed surveys.

1. Navigate to **Human Resources > Surveys > HR Surveys**.
2. Click the survey to evaluate responses.
3. To review individual responses to each question, click the **View Responses** related link and perform any of the following tasks.

Task	Action
<b>See individual responses for a metric (question)</b>	Expand the metric group in the Metric Results list.
<b>View responses based on when the survey was taken</b>	Personalize the Metric Results list to include the <b>Created</b> column, and add a filter using the condition builder. For example, to see all responses since the beginning of the month, add this condition: <b>[Created] [at or after] [&lt;select date&gt;]</b>

If the survey was not submitted anonymously, you can see how users answered and follow up if necessary.

- To review the survey scorecard, click the **View Scorecard** related link and perform any of the following tasks.

Task	Action
<b>Display a different view for the scorecard</b>	<p>Select the view from the left choice list above the chart.</p> <p>The scorecard contains a header that displays the name of the survey and a section that displays results or compares the ratings. The scorecard presents results in the following views:</p> <ul style="list-style-type: none"> <li>• Category Results</li> <li>• Question Results</li> <li>• Average Ratings</li> <li>• History</li> </ul>
<b>Save a chart as an image</b>	<p>Click the menu icon and select the type of image file. After the file is generated, click <b>Download</b>. The file is downloaded to the browser's download folder.</p>

For more information, see [Survey designer](#)

## Workday integration

The Workday integration synchronizes employee profile information in the HR Service Management application with your organization's existing Workday solution.

You need a Workday account with administrative privileges to configure the Workday integration. The instance supports Workday API version 24.1.

### How Workday integration works

Workday is the primary source of all employee data. After you put employee information in Workday and enable the integration on the instance, the instance uses SOAP web services to pull data from Workday on a regular basis. The data is then populated in the HR Profile [hr\_profile], Job Profiles [hr\_job\_profile], Department [cmn\_department], and Location [cmn\_location] tables.

The data taken from Workday is contained in the Worker object. By default, the integration pulls the following data from the Worker object.

- Employee information, such as user name, first and last name, and email addresses
- Location
- Department
- Job profile

In the Workday integration transform maps, you can view the information that is pulled from the Workday record and the corresponding fields that are populated in the HR profile. For each Workday transform map, the source and target tables are listed and you can view the scripts that are run.

When the integration script is processed, all HR profiles are created and activated, even if all data is not present. If a mandatory field is not populated during the import, it must be filled in the next time the record is updated.

The integration also supports automatic record updates based on future dates for events such as employee onboarding, offboarding, transfers, or promotions. For example, after you add information in Workday for a new employee who starts work in a week, the instance retrieves the employee data at the scheduled pull and creates the user and HR records but does not activate the records until the onboard date.

Offboarding works in a similar manner. When you set a termination date for an employee in Workday, the system automatically inactivates the user profile and HR record for the employee on the day after the termination date.

## Synchronizing HR profile information with Workday

Workday integration can synchronize, or push, updates to specific fields that are made in the HR profile. The push runs after the updated information is pulled from Workday. The fields that are pushed include first names, middle names, last names, address, phone numbers (up to 4), email addresses (work and personal), and prefixes.

This synchronization helps maintain the status of contingent workers, such as contractors or temporary employees. This status is defined in the employee's Workday record, and is maintained based on the employee type assigned in the HR profile. If the contingent worker's status changes in Workday, for example, changed to permanent status, the HR profile is updated the next time the integration script runs.

If you have defined custom contingent employment types in Workday, you must add them to the **workday** script include as shown below. The contingent employment types listed are those that Workday provides as a default.

```
// Contingent Worker Employment Type
workday.CONTINGENT_EMPLOYMENT_TYPE=[ 'Consultant', 'Contractor', 'Vendor' ];
```

## Set up the Workday integration

You must subscribe to the Workday integration, and then configure it to synchronize employee profile information.

The following topics provide the steps to activate and set up the Workday integration. Perform them in the order listed.

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